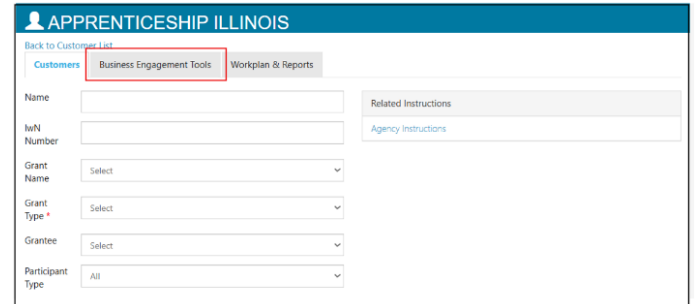


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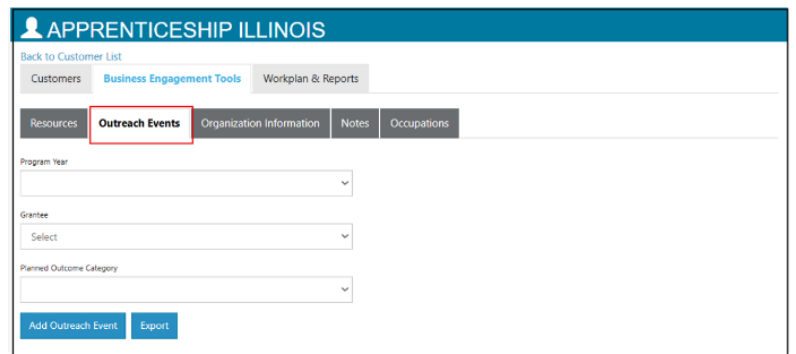
Accessing Business Engagement Tools

1. Select **Business Engagement Tools**



The screenshot shows the 'APPRENTICESHIP ILLINOIS' header. Below it, a navigation bar has three tabs: 'Customers', 'Business Engagement Tools' (which is highlighted with a red box), and 'Workplan & Reports'. On the left side of the page, there are several dropdown menus: 'Name', 'InN Number', 'Grant Name', 'Grant Type', 'Grantee', and 'Participant Type'. On the right side, there is a section titled 'Related Instructions' with a link to 'Agency Instructions'.

2. Select **Outreach Events**



This screenshot shows the same system interface as the previous one, but now the 'Business Engagement Tools' tab is active. Below it, a sub-navigation bar has five tabs: 'Resources', 'Outreach Events' (highlighted with a red box), 'Organization Information', 'Notes', and 'Occupations'. Below the sub-navigation bar, there are three dropdown menus: 'Program Year', 'Grantee', and 'Planned Outcome Category'. At the bottom left, there are two buttons: 'Add Outreach Event' and 'Export'.

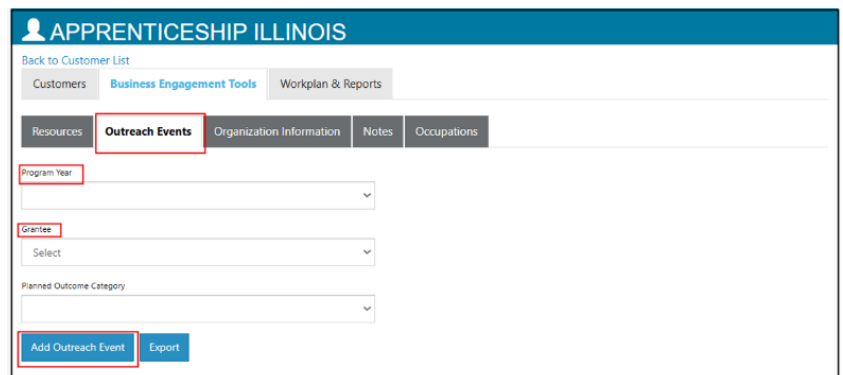
Add Outreach Event

Outreach Events document business and individual engagement in the system.

1. On the **Outreach Events** tab, filter for:

- **Program Year**
- **Grantee**

2. Click **Add Outreach Event**



This screenshot is similar to the previous one, showing the 'Outreach Events' tab selected. However, the 'Add Outreach Event' button at the bottom left is now highlighted with a red box, indicating the next step in the process.

3. Complete the **Add Outreach Event** modal:

- Outreach Name*
- Outreach Type* – See definitions of event types at the top of the modal.
- Event Date*
- Number of Attendees

4. Select **Add Follow-Up Note** to add a note about the Outreach Event.

5. Complete the **Add Outreach Note** modal:

- Case Note Type*
- Contact Date*
- Subject*
- Comment*
- Delivery Method*
 - Select how to send the Case Note:
 - As an Illinois workNet message. This will also be saved as a Case Note.
 - As an Illinois workNet message and email. This will go to the email associated with the Illinois workNet account of the person selected from the list and be saved as a Case Note.
 - Save as a Case Note without sending a message/email.
 - Send Message/Email to
 - If you choose to send it as a message/email, select to whom the message/email should be sent.



6. From the Add Outreach Event modal, select **Upload** to upload documents related to the Outreach Event.

ADD OUTREACH EVENT

OUTREACH EVENT DEFINITIONS

Community/Membership Event/Meetings - A community organization meeting or event or a membership organization meeting or event. i.e. Chamber of Commerce networking, Society of Human Resources guest speaker, National Night Out Booth.

Cold Calls (phone, email, mailers) - Partner initiated communication with a business who has never interacted with the partner before.

Follow-up - Communication with a business after communication was initiated by the business. i.e. Business reached out through Apprenticeship IL website and partner is sending a response communication.

Integrated Business Services Team (IBST) - Any activity initiated by a business services team member.

Regional, State, WIB events - An event sponsored by a regional, state or WIB.

Social media/website - Connection through any social media platform or Apprenticeship IL website.

Referral - Received a referral from another person or business.

Outreach Name *

Audience Type *

Outreach Type *

Event Date *

mm/dd/yyyy

Number of Attendees

Add Follow-Up Note **Upload**

Save Close

7. Clicking Upload will take you to the Provider Info section. The Provider Info section will **open the File Uploads tab**.

PROVIDER INFO

Appointments **File Uploads** Grantee Details Training Programs Compliance Reports

Project Apprenticeship Illinois

Provider Apprenticeship Illinois - ABC Location - 123 Test Lane Testville IL 62704

Filter **Upload File** Reset Filters

File Uploads

Date	File Name	Description	Category	Uploaded By	Remove
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8. Click **Upload File**

9. Complete the **Upload File** modal:

- Select a **Category** from the dropdown list.
- Choose the **file**
- Provide a **detailed description**
- Click **Upload**

The upload details will display in the table after it has been uploaded.

UPLOAD FILE

Category --Select--

File **Choose File** No file chosen

File Types Accepted: .xls,.xlsx,.pdf,.doc,.docx

Description

Upload



10. Go back to the Outreach Event and click **Save**.

11. The new Outreach Event will be displayed in the Outreach Events list.

12. Filter the **events** using the up/down arrows:

- Outreach Name
- Outreach Audience
- Outreach Type
- Number of Attendees
- Event Type

A screenshot of a web interface for managing Outreach Events. At the top left, there are two buttons: 'Add Outreach Event' and 'Export'. Below these is a dropdown menu set to '10' with the text 'entries per page'. To the right is a search bar labeled 'Search:'. Below these elements is a table with six columns: 'Outreach Name', 'Outreach Audience', 'Outreach Type', 'Number of Attendees', 'Event Date', and 'Action(s)'. Each column header has a small up/down arrow icon next to it. The 'Export' button and the table headers are highlighted with red boxes in the original image.

13. Click **See Notes in the right-hand column** of the Outreach Events list to add additional follow-up notes.

14. Click **Export** on the list of events to obtain a list of all events.