

Purpose

The Customer Support Center (CSC) Account/User Management Tool provides partners who have been granted access the ability to:

- Manage access of CSC Tools for staff and/or other partner accounts.
- Access reports associated with their organization/site(s) and/or special projects.

Illinois workNet Roles for Those Who Enter/Maintain Data

Super Administrators – This role allows Illinois Works and Illinois workNet staff to approve new partner account requests, manage existing partner accounts, and view reports that drill down to partner level information in their project. Illinois Works and Illinois workNet staff identify appropriate staff for this role. Initially, Illinois workNet (IwN) Program Admin Staff assign this role. Once a person has Illinois Works Super Administrator access, they can assign roles (that are equal to or lower access) to others. They cannot assign a role higher than their own. Access to customer-level information is based upon the CSC group(s).

Service Provider Program Administrators – This role allows staff to approve new partner account requests, manage existing partner accounts, and view report information for their site(s). Service Provider Program Admin contact accounts, identified in the Illinois workNet Service Finder, should have these roles.

- Initially, IwN Program Admin Staff, Project, or Illinois Works Super Administrators assign this role.
- Once a person has Service Provider Program Admin role, they can assign roles (equal to or less access roles) to others. They cannot assign a role higher than their own role.
- If a Service Provider Program Admin role is combined with a CSC group (e.g., Special Project) that allows them to manage accounts in that group, they will have access to manage partner accounts outside of their organization.
- Access to customer level information is based upon the CSC group(s).

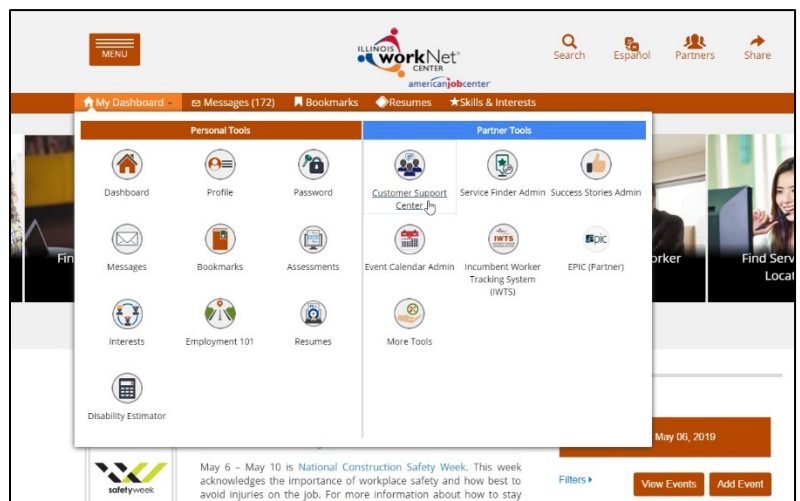
Public Viewer Role (Service Provider/Service Provider Manager)– This role allows staff to access partner tools and view report information for their site(s). It does NOT allow partners to approve new partner account requests or manage other existing partner accounts.

- IwN Program Admin Staff, Illinois Works Super Administrators and Service Provider Program Administrators (of that site) assign this role.
- Access to customer level information is based upon the CSC group(s).

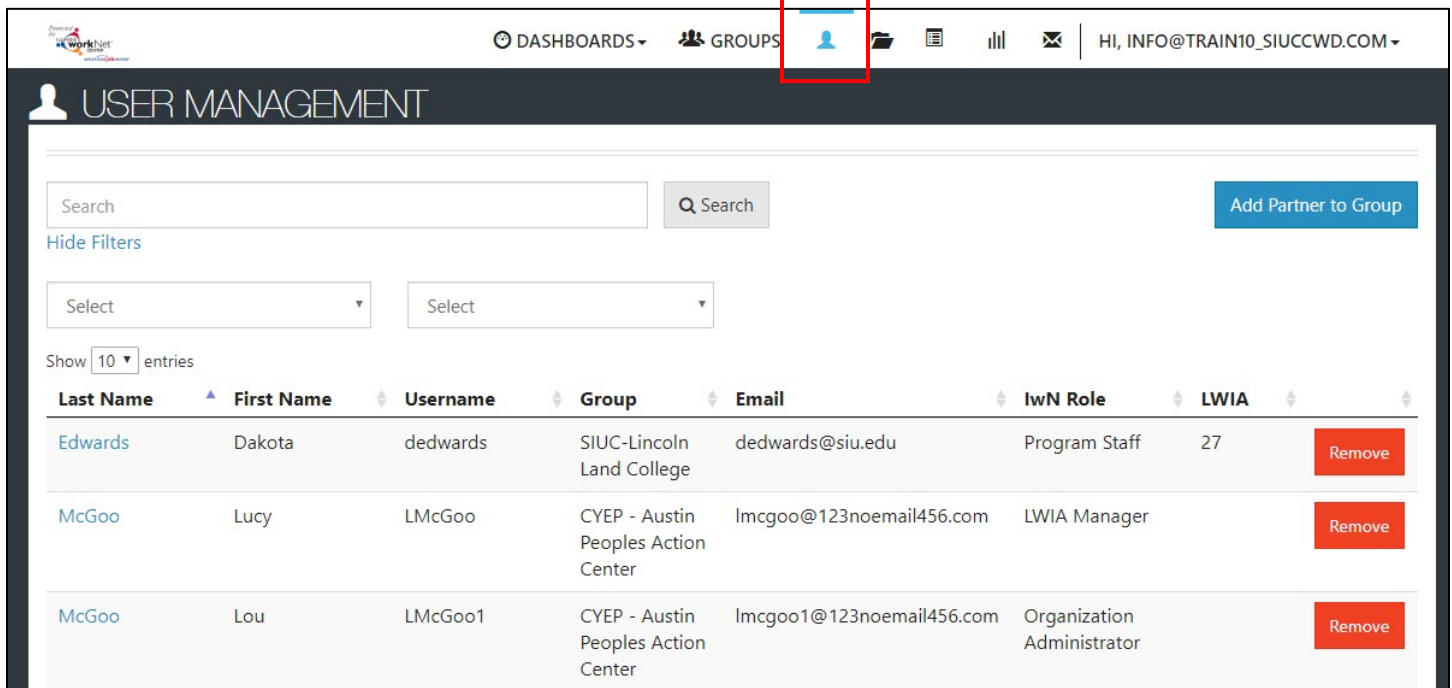
Individual Role – This role does not have access to partner tools.

Access Customer Support Center Tools

1. Log into <https://www.illinoisworknet.com/>.
2. Select **My Dashboard**.
3. Select **Customer Support Center**.
4. Select **User Management Tool** icon. *The icon is the man head image in the Customer Group menu.*

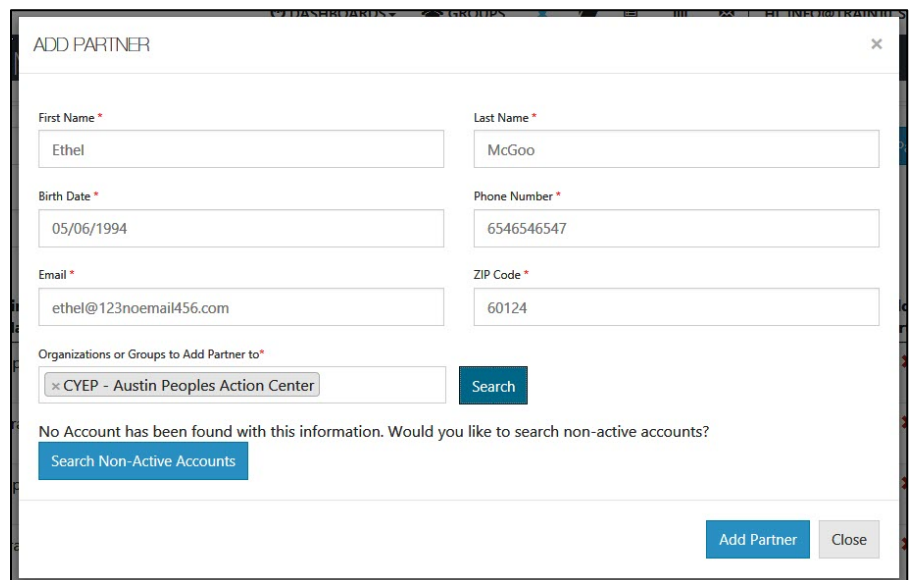
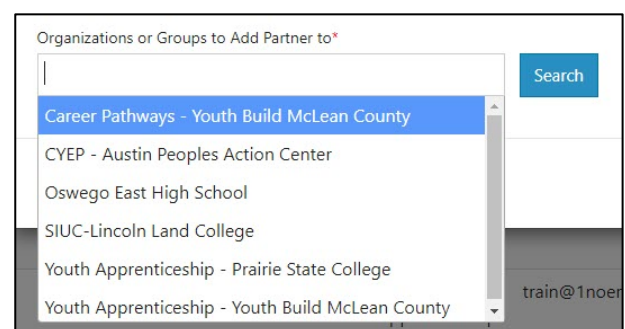


Adding a Customer Without an IwN Account



| Last Name | First Name | Username | Group | Email | IwN Role | LWIA | |
|-----------|------------|----------|-------------------------------------|---------------------------|----------------------------|------|------------------------|
| Edwards | Dakota | dedwards | SIUC-Lincoln Land College | dedwards@siu.edu | Program Staff | 27 | Remove |
| McGoo | Lucy | LMcGoo | CYEP - Austin Peoples Action Center | lmcgoo@123noemail456.com | LWIA Manager | | Remove |
| McGoo | Lou | LMcGoo1 | CYEP - Austin Peoples Action Center | lmcgoo1@123noemail456.com | Organization Administrator | | Remove |

5. Search by the customer's name and agency to check if this user exists in the system. *See instructions in User Account was Found After Searching.*
6. If the user is not found, select the **Add Partner to Group** blue button.
7. In the modal window that opens, enter the information about the user, including:
 - a. First Name
 - b. Last Name
 - c. Birth Date
 - d. Phone Number
 - e. Email
 - f. Zip Code
 - g. Organization(s):
 - i. Click the box to view a list of available organizations.
 - ii. Find the agency to which the partner is to be assigned. Hover to highlight the agency and click to select the appropriate agency.
 - iii. If adding more than one organization, click the box again, then select an additional organization, following the instructions in *ii*.
 - iv. Continue selecting until all appropriate agencies have been added.
 - v. When all agencies have been selected, click **Search**.

- h. If an active account is not found, the following appears *"No Account has been found with this information. Would you like to search non-active accounts?"* Click the Search Non-Active Accounts blue button.
 - i. If no active or non-active account is found, the following appears *"No Account has been found with this information. Would you like to create one?"* Answer **Yes**.
 - j. Does this account need to have access to view or manage this organization's staff? The info bubble reads: *"Yes = User will have ability to add and remove staff for their location. No = User will only see reports and customer information"*.

Does this account need to have access to view or manage this organization's staff? * ⓘ

Yes
 - k. Select **Add Partner**.
- At the bottom of the modal, the User Name and Password will appear. Save this information for the user. *A new Illinois workNet account has been created for the user.*
 - Close the modal window by clicking **Close**.
 - From the list of accounts, click on the user's last name. On the user's profile, click on the Groups tab to check the agencies to which the user has access.
 - Once the account is established, if user status is changed, their account can manage other users by checking the box under the *User Management* tab in their profile. Checking the box allows access to manage other users at an equal or a lower user level.

ADD PARTNER

First Name *

Joe

Birth Date *

05/06/1994

Last Name *

McGoo

Phone Number *

6546546543

Email *

jmcgoo@123noemail456.com

ZIP Code *

60124

Organizations or Groups to Add Partner to*

CYEP - Austin Peoples Action Center

Youth Apprenticeship - Prairie State College

Search

A new account has been created for you. Please write down the account information below.

User Name:

JMcGoo

Password:

McGoo050694

Close

MCGOO, JOE

Profile: Joe McGoo

workNet ID 26262

IWDS User ID N/A

Last 4 SSN

User Name JMcGoo

Groups

Career Plan

Assessments

Optimal Resume

Success Stories

Worksites

Outcomes

User Management

Allow Access to User Management

ILLINOIS workNet[®] CENTER

DASHBOARDS

GROUPS

HI, INFO@TRAIN10.SUCCWD.COM

CUSTOMERS - PROFILE

Search

MCGOO, JOE

Profile: Joe McGoo

workNet ID 26262

IWDS User ID N/A

Last 4 SSN

User Name JMcGoo

Email jmcgoo@123noemail456.com

Account Created 5/6/2019

Active Yes

See All

Reset Password

Send Message

Groups

Career Plan

Assessments

Optimal Resume

Success Stories

Worksites

Outcomes

User Management

Groups

Partners can see if a customer has been added to other program/personal groups. Once the customer submits an application or accepts an invitation, they are automatically placed in that specific group. It does not mean the customer participated in the program, but an action was taken to put them into the specific group.

GROUPS

Show 10 entries

Search:

| Group Name | Group Type | Role | Is Active | Remove |
|----------------------------------------------|---------------|---------|-----------|--------|
| CYEP - Austin Peoples Action Center | Authorization | Partner | True | |
| CYEP - Community Youth Employment Program | ProjectGroup | Partner | True | |
| Youth Apprenticeship | ProjectGroup | Partner | True | |
| Youth Apprenticeship - Prairie State College | Authorization | Partner | True | |

Showing 1 to 4 of 4 entries

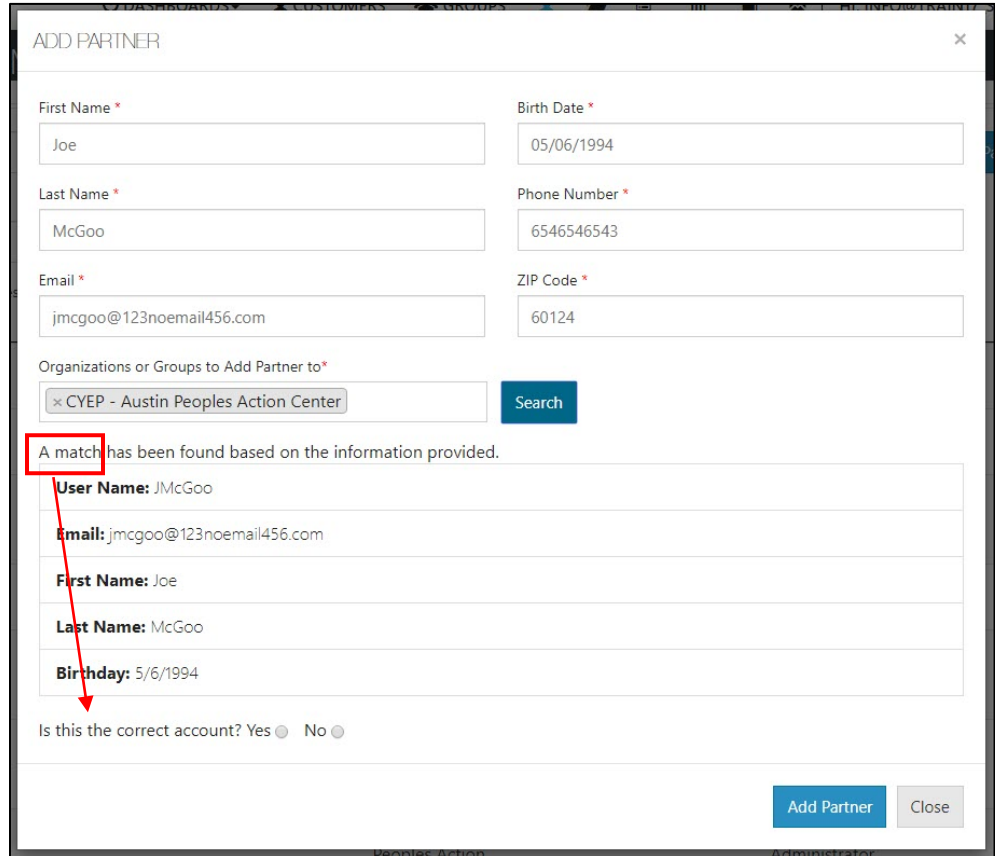
Previous 1 Next

Add Subgroup

Adding Access for Users with an IwN Account

After clicking the **Search** button, if the user already has an account, verify that the account is correct.

1. IwN returns matches based on the search process:
 - a. 1st by Email, 2nd by name and DOB, 3rd by active accounts.
 - b. If no match is found in active accounts, the system will ask to **Search Non-Active Accounts**.
 - c. If an exact match is available, select Yes. Clicking NO closes the account.
 - d. If an exact match is not present, verify the information for the user that was returned. If updates are needed (i.e. email or last name, contact the user or info@illinoisworknet.com).
 - e. Does this account need to have access to view or manage this organization's staff? The info bubble reads: "Yes = User will have ability to add and remove staff for their location. No = User will only see reports and customer information." Answering "Yes" to this question will open the second question.
2. Select **Add Partner**.
3. If the user already exists in the group, a message will popup that reads "**Partner Already Exists in this Group**", if not, the user will be added to the new group.



ADD PARTNER

First Name * Birth Date *

Last Name * Phone Number *

Email * ZIP Code *

Organizations or Groups to Add Partner to * **Search**

A match has been found based on the information provided.

User Name: JMcGoo

Email: jmcgoo@123noemail456.com

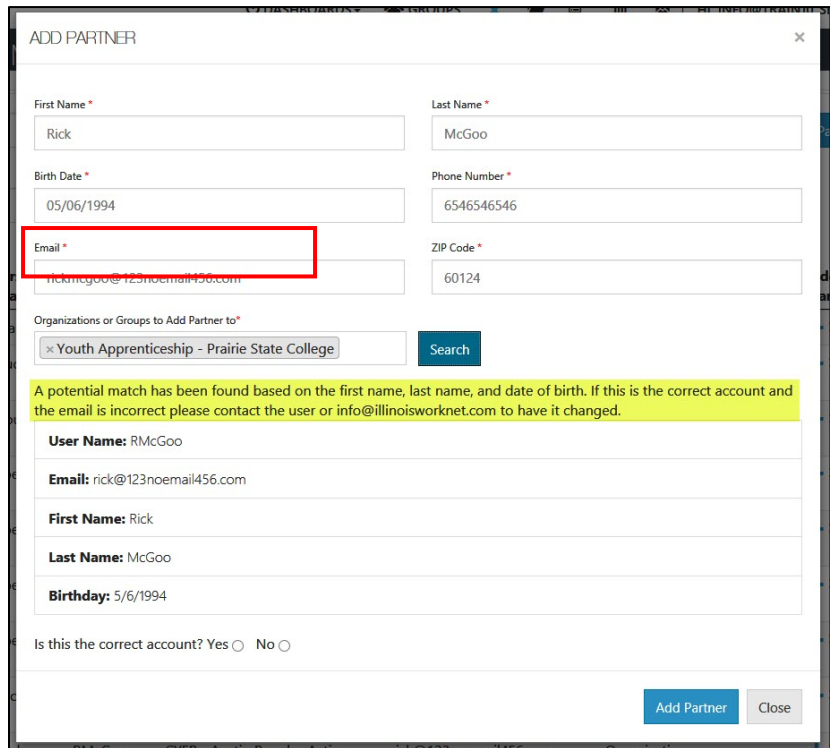
First Name: Joe

Last Name: McGoo

Birthday: 5/6/1994

Is this the correct account? Yes ☐ No ☐

Add Partner **Close**



ADD PARTNER

First Name * Last Name *

Birth Date * Phone Number *

Email * ZIP Code *

Organizations or Groups to Add Partner to * **Search**

A potential match has been found based on the first name, last name, and date of birth. If this is the correct account and the email is incorrect please contact the user or info@illinoisworknet.com to have it changed.

User Name: RMcGoo

Email: rick@123noemail456.com

First Name: Rick

Last Name: McGoo

Birthday: 5/6/1994

Is this the correct account? Yes ☐ No ☐

Add Partner **Close**

User Account was Found After Searching

1. Click the “+” icon, in the row with the partner’s name, **to Add Partner to Group**. Users who are inactive will have an info bubble by the “+” and “x” icons. Once added to the group, they automatically become active again.
2. Information in user’s profile will autofill required fields needed for addition into the group. Complete the required fields missing information. If updates are needed (i.e. email or last name), then contact the user or info@illinoisworknet.com.
3. Select the group(s) to which the user is to be added. Click in the box to see a list of groups from which you can select.
4. **Click Search**. *The results will return that some information does not match if information is missing on partner account. In this example, the Birth Date* was added.* If the account is correct, select “Yes” and continue.
5. Does this account need to have access to view or manage this organization’s staff? The info bubble reads “Yes = User will have ability to add and remove staff for their location. No = User will only see reports and customer information.” Answering “Yes” to this question will open the second question.
6. Select **Add Partner**.
7. Verify information was properly added by clicking on the user’s hyperlinked Last Name in the list.

| | | | | | | |
|----------|--------|----------|--------------------------------------------------|------------------------|---------------|-------|
| Partner1 | Train | trainWP1 | Youth Apprenticeship - Youth Build McLean County | train@1noemail.com | Public Viewer | + x i |
| Partner1 | Cptest | CPtest1 | Career Pathways - Youth Build McLean County | cptest1@noemail123.com | Public Viewer | + x i |

ADD PARTNER

First Name *

WPP

Last Name *

Train25

Birth Date *

05/06/1994

Phone Number *

2177897897

Email *

info@train25_illinoisworknet.com

ZIP Code *

62707

Organizations or Groups to Add Partner to *

> CYEP - Austin Peoples Action Center

Search

An account has been found with this email address but some information does not match.

User Name:

info@train25_siuccwd.com

Email:

info@train25_illinoisworknet.com

First Name:

WPP

Last Name:

Train25

Birthday:

N/A

Is this the correct account?

Yes ☐ No ☐

Add Partner

Close