

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

Project or LWIA Coordinator/Manager Role – This role allows staff to approve new partner account requests, manage existing partner accounts, and view reports that drill down to partner level information in their project or LWIA. State agencies, Commerce and/or LWIA Directors identify appropriate staff for this role; the Coordinator/Manager roles have the same access. Initially, Illinois workNet (IwN) Program Admin Staff assign this role. Once a person has Project or LWIA Coordinator/Manager, 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).

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

- Initially, IwN Program Admin Staff, Project, or LWIA Coordinators/Managers assign this role.
- Once a person has Primary or Secondary 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 Primary or Secondary 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).

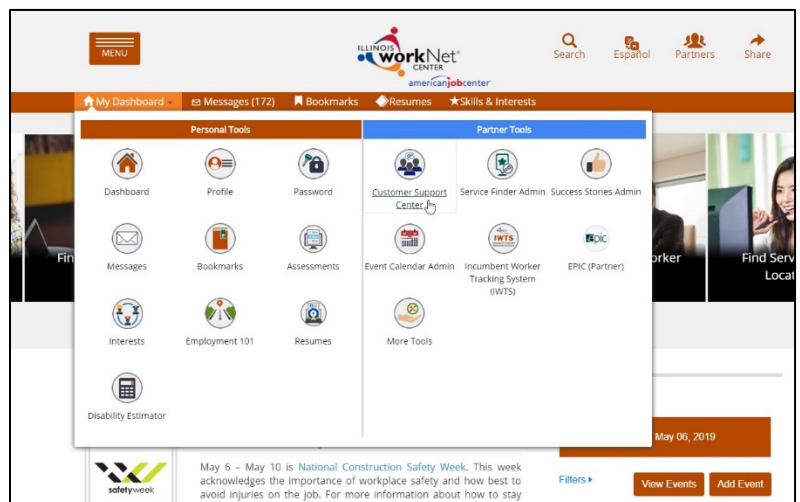
Public Viewer Role – This role allows staff to access partner tools and view report information for their site(s). It does NOT allow partners to approve new partner account requests or manage other existing partner accounts.

- IwN Program Admin Staff, Project, LWIA Coordinators/Managers, or Organization Admins (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:

The screenshot shows the 'USER MANAGEMENT' interface. At the top, there are navigation tabs for 'DASHBOARDS', 'GROUPS', and a user profile icon (highlighted with a red box). Below the navigation is a search bar and a table of users. A blue button labeled 'Add Partner to Group' is visible in the top right corner of the user management area.

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):

The 'ADD PARTNER' modal window contains the following fields and options:

- First Name: Ethel
- Last Name: McGoo
- Birth Date: 05/06/1994
- Phone Number: 6546546547
- Email: ethel@123noemail456.com
- ZIP Code: 60124
- Organizations or Groups to Add Partner to*:
 - CYEP - Austin Peoples Action Center
- Buttons: Search, Add Partner, Close
- Message: No Account has been found with this information. Would you like to search non-active accounts?
 -

The dropdown menu for 'Organizations or Groups to Add Partner to*' shows the following options:

- Career Pathways - Youth Build McLean County (highlighted)
- CYEP - Austin Peoples Action Center
- Oswego East High School
- SIUC-Lincoln Land College
- Youth Apprenticeship - Prairie State College
- Youth Apprenticeship - Youth Build McLean County

- 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.

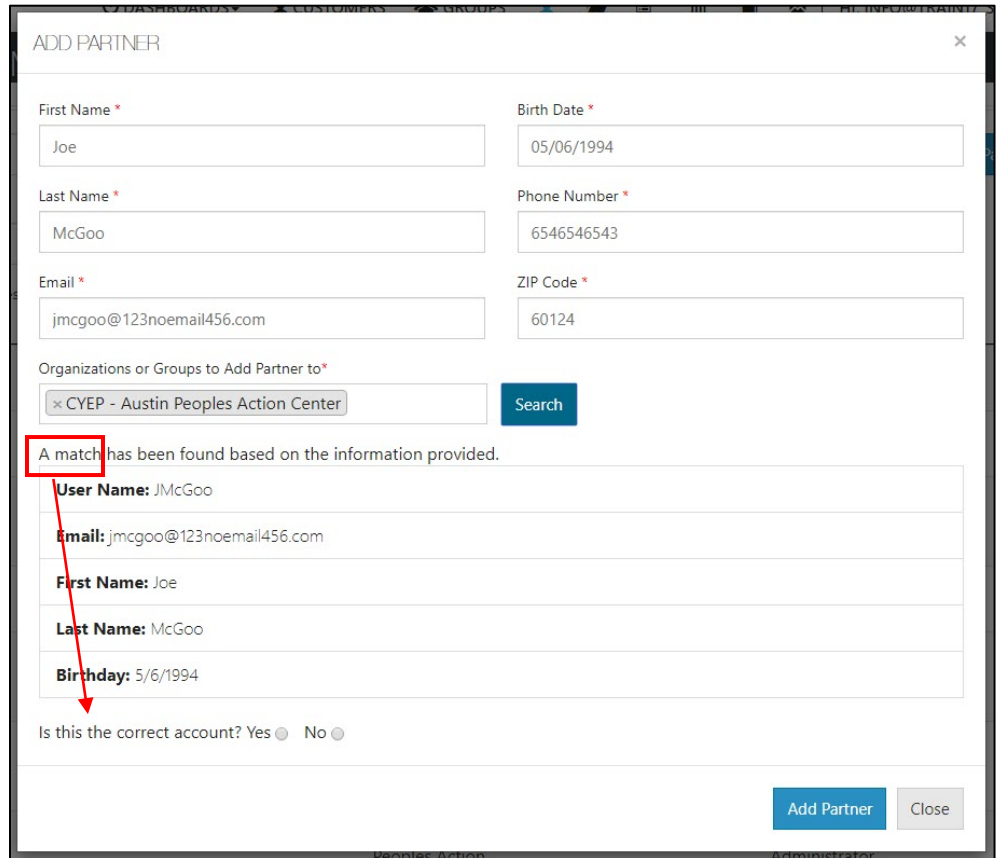
- v. When all agencies have been selected, click **Search**.
 - h. If an active account is not found, the following appears *“No Account has been found with this information. Would you like to search non-active accounts?”* Click the Search Non-Active Accounts blue button.
 - i. If no active or non-active account is found, the following appears *“No Account has been found with this information. Would you like to create one?”* Answer **Yes**.
 - j. Answer two possible questions:
 - i. 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.
 - ii. Does this account need to have access to manage account information for project sites or partner sites in their LWIA? The info bubble reads: *“Would this user need to add users to any other sites in the project or LWIA?”*
 - k. Select **Add Partner**.
8. 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.*
 9. Close the modal window by clicking **Close**.
 10. 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.
 11. 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.

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	

Adding Access for Users with an lwN Account

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

1. lwN 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).
2. Answer two possible questions:
 - a. 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.
 - b. Does this account need to have access to manage account information for project sites or partner sites in their LWIA? The info bubble reads: *"Would this user need to add users to any other sites in their project or LWIA?"*
3. Select **Add Partner**.



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

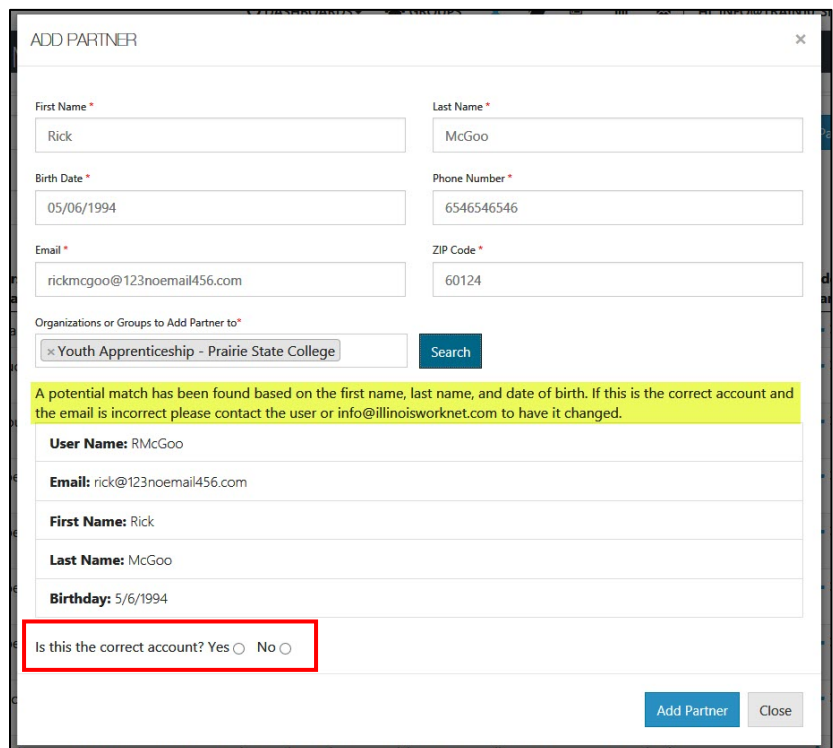
First Name: Joe

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**

- 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.

User Account was Found After Searching:

- 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.
- 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.
- 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.
- 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.
- Answer two possible questions:
 - 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.
 - Does this account need to have access to manage account information for project sites or partner sites in their LWIA? The info bubble reads *“Would this user need to add users to any other sites in their project or LWIA?”*
- Select **Add Partner**.
- 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 *

Birth Date *

Email *

Last Name *

Phone Number *

ZIP Code *

Organizations or Groups to Add Partner to*

x CYEP - Austin Peoples Action Center

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