

Navigating the ISAAC Dashboard

Welcome to WEDnetPA's Information Sharing Administration & Analysis Center (ISAAC)

The purpose of this document is to help navigate the company dashboard in ISAAC. This training guide will explain such features as Contract Management, User Management & Inquiry, Application & Contract detail.

This ISAAC dashboard consists of three main parts.

Casey's Cookies

Casey's Cookies

1224 Lose Ave
Williamsport, PA 17701-3702
Phone: (570) 555-6497
Fax #: (570) 327-6497
hbaldwin@pct.edu

Description: Cookie and Cracker Manufacturer

POC Name: Casey Baldwin
Company Exec.: Ben Baldwin
Company ID: 9125
FEIN: 57-9169644
NAICS: 311821
Size of Company: 1 - 100 Employees
Turnover Rate: 6%

County: Lycoming
Team PA Region: Central
WIB Region: Central PA
Senate District #: 23
House District #: 83

Eligibility: Eligible in 2015-2016 -- Company may apply for funding this year based on participation history. Check other eligibility criteria to ensure that the company is eligible. [View Funding History](#)

* No Active Contracts Found *

NEW INQUIRY [+]

HELP REPORT ERROR LOGOUT

1. **Contract Manager** – contains information regarding people within your company with access to ISAAC
2. **Company Data** – provides contact information for your company, as well as your company's eligibility and funding history.
3. **Inquiry, Application & Contract** – lists status information for both ES and AT contracts

Contract Manager Section

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HELP REPORT ERROR LOGOUT

The **Contract Manager** section provides data on employees assigned by the company Point of Contact (POC) to have certain rights in ISAAC

- Update personal data by selecting either your name or photo
- Add Company Location - A POC can also be assigned to another company contract that shares the same FEIN but has a different location (each company location would need its own WEDnetPA profile in ISAAC)
- Add, manage, and delete users through User Management

Navigating the ISAAC Dashboard

Company Data Update

The screenshot shows the WEDnetPA Client Portal interface. On the left, there is a profile for Casey Baldwin, Manager of Casey's Cookies. The main content area displays company details for 'Casey's Cookies', including address, phone, and various identification numbers. An 'Update Company Data' dialog box is open, allowing for the modification of company information such as name, description, address, and contact details. A red arrow points from the 'Casey's Cookies' link in the main content area to the dialog box. The top right of the page indicates '2015-2016' and 'No Active Contracts Found'. Navigation links for 'HELP', 'REPORT ERROR', and 'LOGOUT' are visible at the bottom right.

Update Company information by selecting the company name.

Company Data - Eligibility

This screenshot shows the same WEDnetPA Client Portal interface, but with the eligibility information for 'Casey's Cookies' highlighted. The eligibility text states: 'Eligibility: Eligible in 2015-2016 -- Company may apply for funding this year based on participation history. Check other eligibility criteria to ensure that the company is eligible. [View Funding History](#)'. A red arrow points to the 'View Funding History' link. The rest of the page layout, including the company profile and navigation elements, remains the same as in the previous screenshot.

Companies are eligible to participate in WEDnetPA for 2 consecutive years or 3 out of a 5 year period. ISAAC automatically tracks this data and provides a comprehensive report by selecting "View Funding History". If company is NOT eligible, the eligibility box will change to this

Eligibility: Not eligible in 2015-2016 -- Company has been funded for two consecutive years. [View Funding History](#)

Navigating the ISAAC Dashboard

Company Data - User Management

WEDnetPA Client Portal | 2015-2016

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User Management

* No Active Contracts Found *

NEW INQUIRY [+]

Add New User

Last Name	First Name	Access Level	Contact	Options
Ayers	betty	Manager	Not Selected	
Baldwinski	Casey	Manager	Primary	
McLean	Connor	Staff	Executive	

HELP | REPORT ERROR | LOGOUT

User Management

The User Management tool is located in the Contact Manager and Company Data sections

- Add and inactivate ISAAC users
- Set Access Level for each user
- Determine Primary and Executive contacts
- Under **Options**, set
 - Setting Preferences and Privileges
 - Reset Password
 - Inactivate user

User Management: Add New User

WEDnetPA Client Portal | 2015-2016

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Company User Management

NEW INQUIRY [+]

Add New User

Add New User

First Name: Connor
Middle Initial:
Last Name: McLean
Title: CEO
Work Phone: (570) 555-6497
Work Phone Ext:
Fax: (570) 327-8987
Email: hbaldwin@pct.edu
Username: cmclean
Zip Code: 17701-1770
State: PA
City: Williamsport
Address: 1224 Lose Avenue
Level: Staff

ADD USER | CANCEL

HELP | REPORT ERROR | LOGOUT

Select User Management Icon to add new user

Navigating the ISAAC Dashboard

User Management: Setting Access Level

WEDnetPA Client Portal | 2015-2016

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Casey Baldwin
Casey's Cookies 1
Access: Manager

Company User Management

Last Name	First Name	Access Level	Contact	Options
Baldwinski	Casey	Manager	Primary	[Icons]
McLean	Connor	Staff	Not Selected	[Icons]

Ask ISAAC > Access Levels

WEDnetPA's Information Sharing, Administration & Analysis Center (ISAAC) employs multiple security measures to keep your data safe. One such technique is a system of access levels which determine to what actions and what information each user is granted access. Some of these include:

- Manager** -- The manager level is for a point of contact (POC) and any other user who manages the settings and assigns other users on ISAAC for your company. This does not reflect the title or authority level the user has in your company, only the level of access on ISAAC.
- Staff** -- The staff level is for any user who may view and enter data for your company, but does not manage other users or your company's settings on the system. This level may be for data entry personnel or supervisors who need to view data but not manage your company's ISAAC settings.
- Associate** -- The associate level is for any user who may view your company data, but does not manage other users or your company's settings on the system. This level may be for personnel or supervisors who need to view data but not manage your company's ISAAC settings.

Only the Primary Point of Contact should have Manager Access, which will be assigned in ISAAC by the WEDnetPA Partner.

User Management: Setting Contact Level

WEDnetPA Client Portal | 2015-2016

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Casey Baldwin
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Access: Manager

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Company User Management

Last Name	First Name	Access Level	Contact	Options
Baldwinski	Casey	Manager	Primary	[Icons]
McLean	Connor	Staff	Not Selected	[Icons]

Each company MUST have a Primary Point of Contact (POC). Companies with 100 or more employees must also have a Company Executive listed. To assign a contact level, click on the user's Contact box and select either "Primary" or "Executive".

Navigating the ISAAC Dashboard

User Management: Options>Preferences

The screenshot shows the 'Casey's Cookies' company profile with the following details:

- Address: 1224 Lose Ave, Williamsport, PA 17701-3702
- Phone: (570) 555-6497
- Fax #: (570) 327-6497
- hbalwin@pct.edu
- POC Name: Casey Baldwinski
- Company Exec.: Casey Baldwinski (Manager, Primary)
- Company ID: 57-9169644
- FEIN: 311821
- NAICS: 311821
- Size of Company: 1 - 100 Employees
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The 'Connor McLean Preferences' window shows notification settings:

NOTIFICATION TYPE	EMAIL	MEMO
New Inquiry	<input type="checkbox"/>	<input checked="" type="checkbox"/>
New Application	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Application Approval	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice Completed	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Training Plan Change	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Made	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User Access Request	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Application Sent Back By SWO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pending Invoice	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice Sent Back By SWO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reallocation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Preferences determines how a user will be notified when changes are made to a contract. Primary POC's should have all boxes checked in the "Email" column. "Memo" notifications provide a note in ISAAC.

User Management: Options>Privileges

The screenshot shows the 'Casey's Cookies' company profile with the following details:

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The 'Connor McLean Privileges' window shows the following permissions:

- Banker: Allowed to move money between the bank and contracts.
- Approver: Submit, confirm, or reject inquiries, invoices, etc.
- SSNs: Enter and view employee Social Security numbers.
- Salaries: Enter and view employee salary information.
- Signer: Authorized to sign contracts.

Privileges determine what a user is permitted to do when working in ISAAC.

Navigating the ISAAC Dashboard

User Management: Options>Reset Password and Disable User Access

WEDnetPA Client Portal 2015-2016

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Company User Management

Add New User

Last Name	First Name	Access Level	Contact	Options
Baldwinski	Casey	Manager	Primary	[edit] [delete] [X]
McLean	Connor	Staff	Not Selected	[edit] [delete] [X]

NEW INQUIRY [+]

HELP | REPORT ERROR | LOGOUT

- Reset User Password – to be used when other User's assigned to the company's contract need a password reset.
- X Select when disabling a user's access.

Contract Section

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The 3rd section of the ISAAC dashboard provides detail and access to company inquires, applications, and contracts.