ISAAC Application
Quick Start User Guide
for Company Users

Funded by the Pennsylvania Department of Community & Economic Development, WEDnetPA provides funding to qualified employers to train their employees.

View our Company Guidelines for current program eligibility requirements.

This Quick Start User Guide will assist in accessing and using the *Information Sharing, Administration & Analysis Center* (ISAAC) portal. ISAAC manages all data aspects of the WEDnetPA program. Beginning in December 2024, ISAAC will be housed on a Salesforce platform.

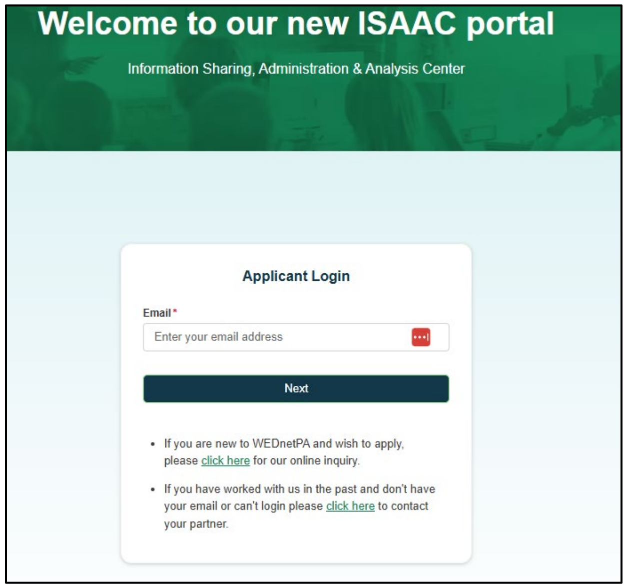
For additional information or assistance, please reach out to one of our 22 WEDnetPA partners: https://wednetpa.com/our-partners/

Contents

Log in

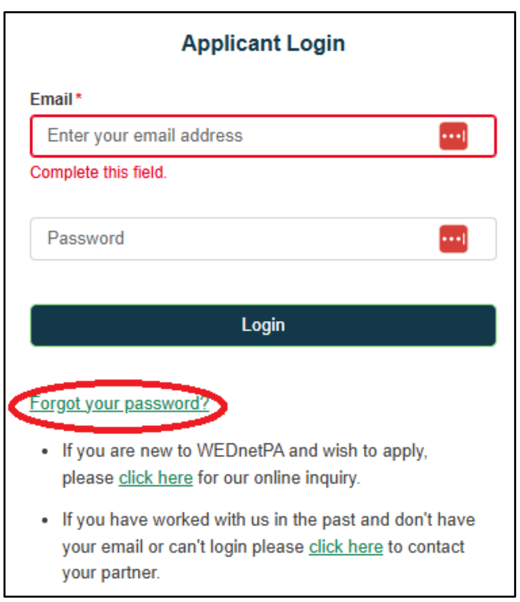
How do I log in?

You can log in at the following URL: https://wednetpa.my.site.com/company using your username and password. You will be required to login using multi-factor authentication. If you forget your password, you can click the link at the bottom of the page.



How do I recover my password?

On the log in page, a user can click on "Forgot your password" link. The user will receive an password.



Do I need to use Multi-Factor Authentication (MFA)?

Yes. All users are required to log in using MFA. Each time a user logs out of Salesforce, they will be required to log in again using MFA. A forced logout will occur every 24 hours.

The recommended apps for MFA are:

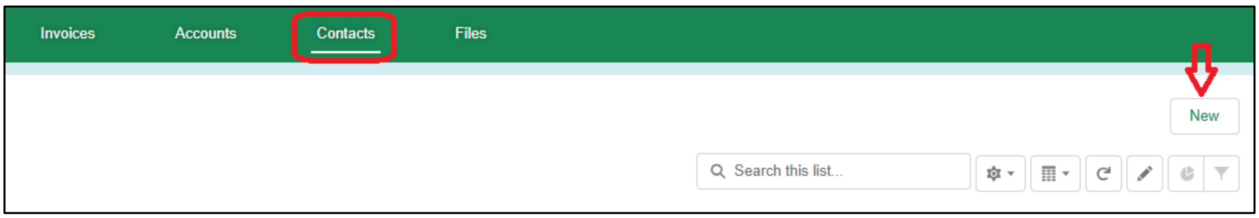
- Salesforce Authenticator. More information can be found here.
- Google Authenticator
- Microsoft Authenticator

Different authenticator apps may have unique features and user interfaces which can lead to variations in how to complete the MFA process. Apps may require a code or allow a tap to log in, depending on the one you choose.

Company Administration

How do I add additional users?

Users who are listed as the **Primary** can add company users by selecting the Contacts menu option. Once on the Contacts menu, the user can click on "New" to add additional users. Do not overwrite an existing user with another user's email address; the username will not be updated.



What permissions can I assign to users?

All primary contacts will be added with Manager permissions by default. All executive contacts will be added with Staff permissions by default and must be of higher authority than the primary contact. There can only be one primary and one executive. Others will be added with Associate permissions by default but can be requested to be changed by the SWO to Staff. Below are the available permissions:

- Manager level access has any/all permissions and they can add/modify/delete users.
- Staff level access has any/all permissions except they cannot add/modify/delete users.
- Associate level access is view only with no permissions.

When changing types from one to another, due to permissions differences, the system batches the changes and the affected permissions are not immediately available.

If the primary or executive is changed on the account's contact, the same change needs to be made to the current application/contract.

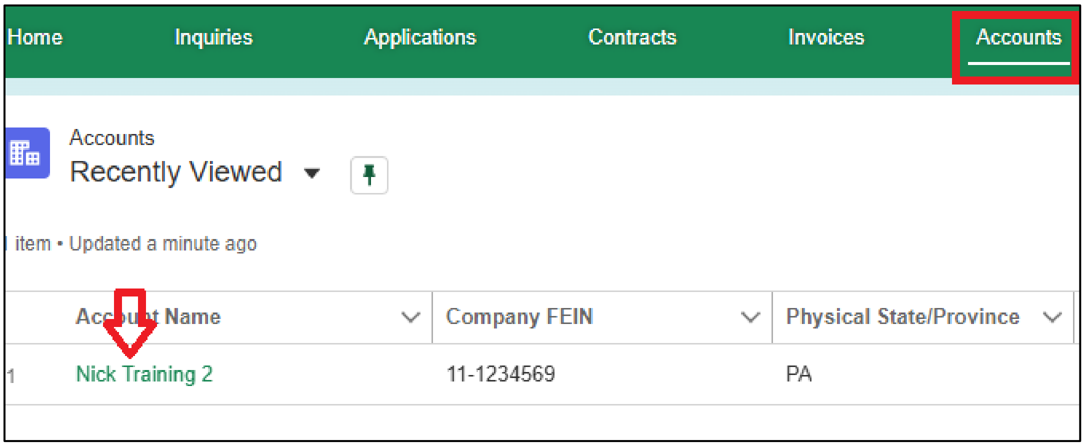
Company Permission Definitions

- Approver – Can approve/send application/contract/invoices to the next level.
- Signer – This type of permission is used while creating partner or third-party invoice.

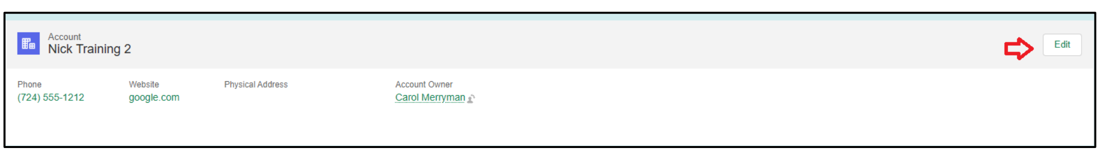
- Banker - This type of permission is used while submitting/approving/voiding an application and contract.
- Salaries - This type of permission is used while creating In-house invoice.

How do I edit my Company information?

Users who are listed as the **Primary** can edit their company information by first selecting the Accounts menu option. Once on the Accounts menu, the user can click on the name of their organization to view the Account Detail screen.



Once on the Account Details screen, the user can click on "Edit" to make the necessary changes. FEINs cannot be modified so if a company's FEIN has changed, the user will need to submit as a new company through the public inquiry site <u>or</u> the WEDnetPA partner can create the new Account/FEIN. If the company's name has changed but their FEIN remains the same, the existing Account can be updated.



Email notifications: if contact is listed as primary or executive on inquiry/application/contract, they will receive all email notifications regardless of the specific email notifications selected.

Inquiry

How do I submit an inquiry as a new company?

As a new company, a user can visit https://wednetpa.com/apply/ and click on "Apply" and follow the instructions for a new company. The user will be presented with a form to complete as part of the Inquiry process. A few fields to note:

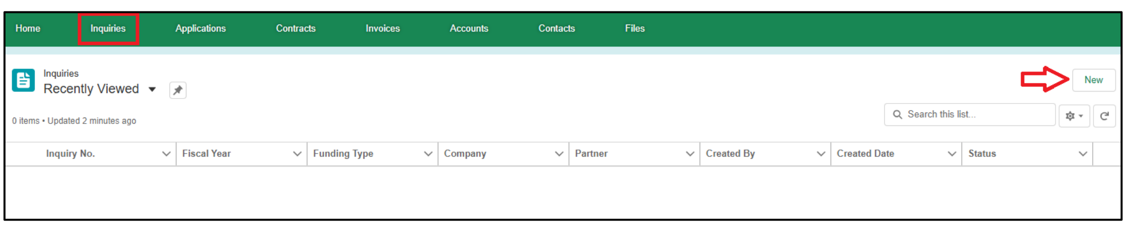
- All fields with a red asterisk are required.
- Enter the correct NAICS code if available. Users can visit https://www.census.gov/naics/ if they have any questions.
- Zip Codes should be zip +4. If a user does not know their +4, the user can enter 0000 and the +4 will be determined in the address validation screen.
- Please make sure that all email information entered for Primary and Executive contacts is accurate as this will be where the new user invite emails will be sent.

Users will receive a confirmation email that the inquiry was submitted successfully. The user will be able to login after the partner accepts the Inquiry.

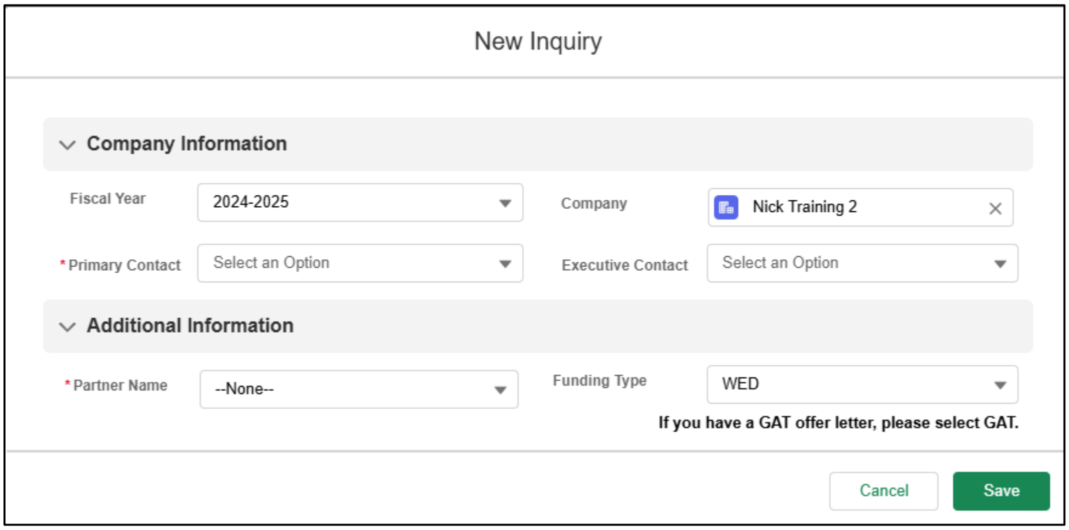
If you applied as a new company and your inquiry was rejected, you must apply again as a new company through our public inquiry site; you will not reapply as an existing company.

How do I submit an inquiry as an existing company?

A user can submit a new inquiry as an existing company by logging in to ISAAC and selecting the Inquiries menu option. Once on the Inquiries screen, the user can select "New" to submit a new Inquiry for the current fiscal year.

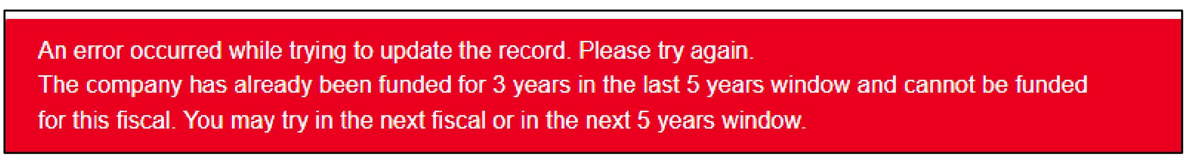


The user will be presented with a New Inquiry form to complete.



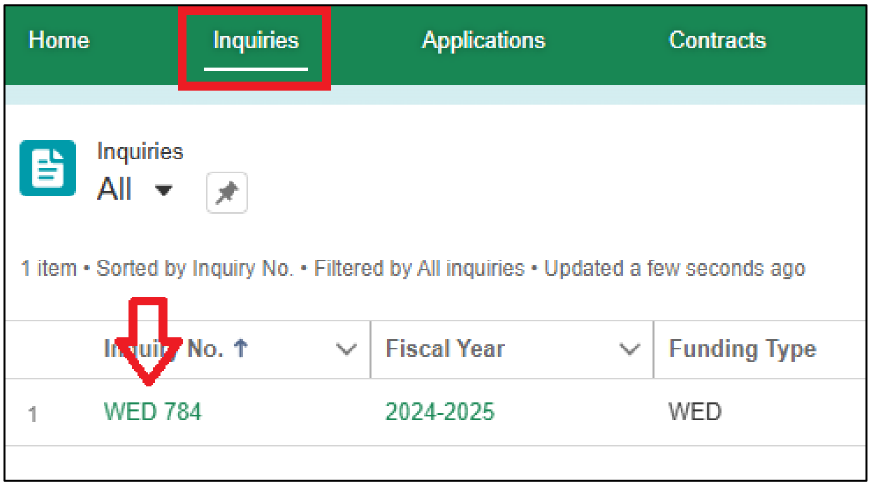
What will a company see if they are not eligible for funding this year?

Users will be presented with a descriptive alert if they are not eligible for funding in the current fiscal year.



How do I view my Inquiry Information?

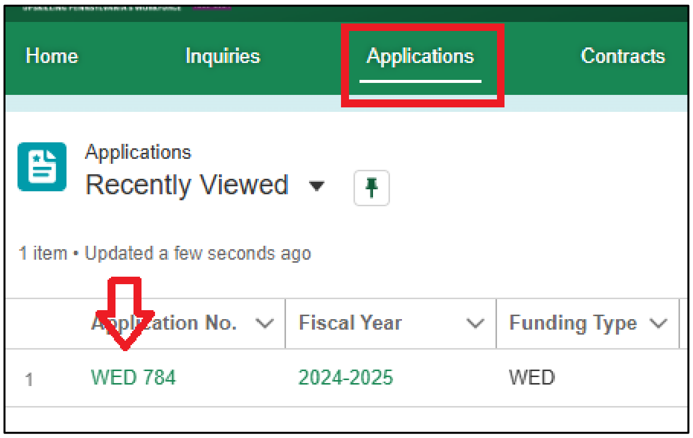
Users can view information related to their inquiry by selecting the Inquiries menu option. Once on the Inquiries screen, the user can click on the inquiry they would like to view.



Applications

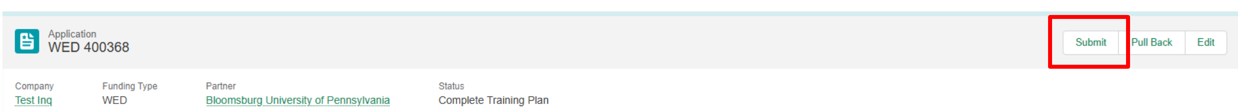
How do I view or edit my application information?

Users can view information related to their application by selecting the Applications menu option. Once on the Application screen, the user can click on the Application they would like to view.

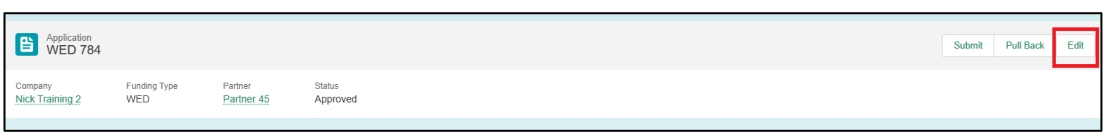


How to submit pending application to partner review?

Users click on Submit button in the upper right corner of their pending application. If this button is not visible, you do not have permission to submit applications for approval.

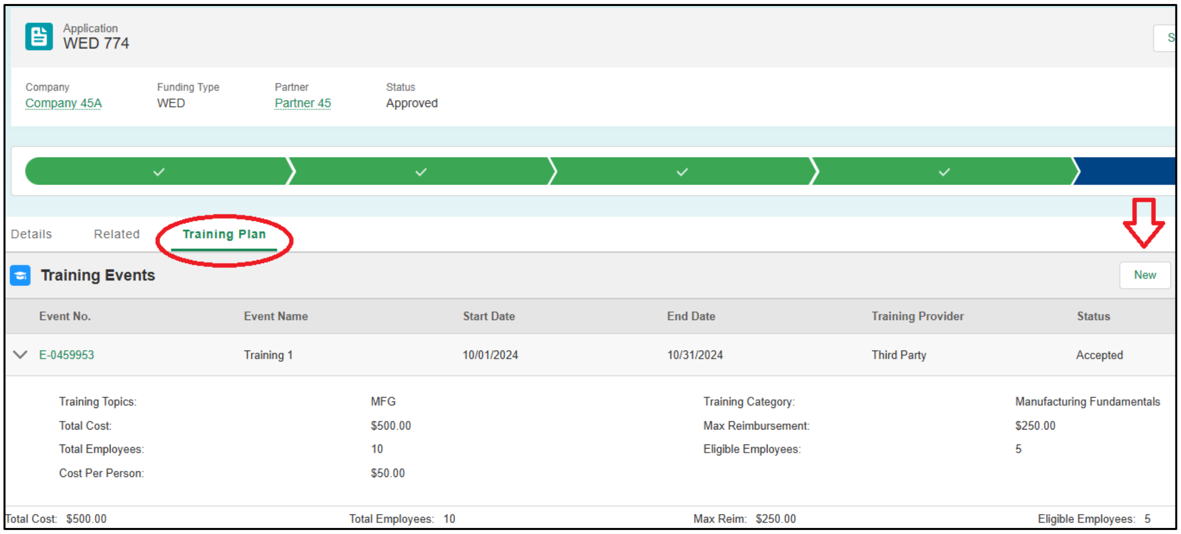


Users can edit their application by then clicking "Edit" from the Application details screen.



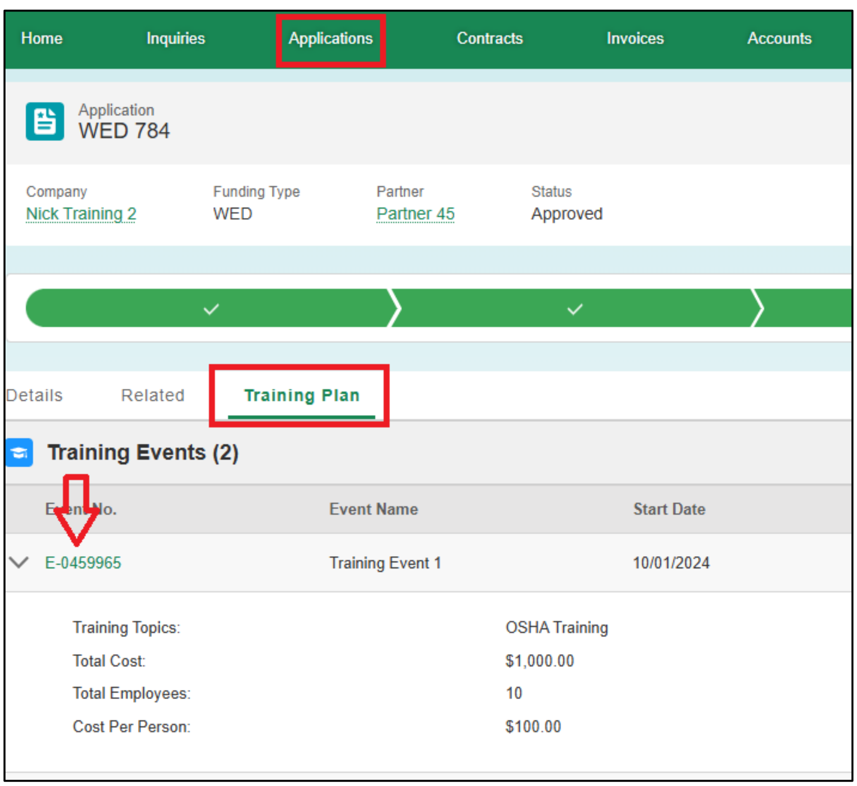
How do I create a Training event?

Users can add a training event by clicking on an application. This will open the details screen for their application. Once in the Application screen, the user can click on the Training Plan tab and add training events associated with their Training Plan by clicking "New".



How can I edit a Training event?

Users can edit a training event by clicking on an application. This will open the details screen for their application. Once in the Application screen, the user can click on the Training Plan tab and edit training events associated with their Training Plan by clicking on the Training Event they wish to edit.

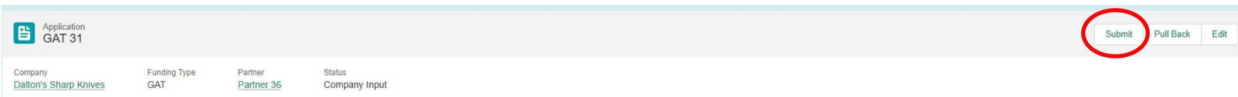


Attachment File Names:

When adding a file attachment, the file name must be informative. Good Example: GAT Offer Letter Dated 12/15/24 for Acme Widget Company. Bad Example: File1726692274683.pdf doesn't indicate what the attachment is.

How to Submit Application to Partner Review:

Press the Submit button in the upper right corner of pending application.

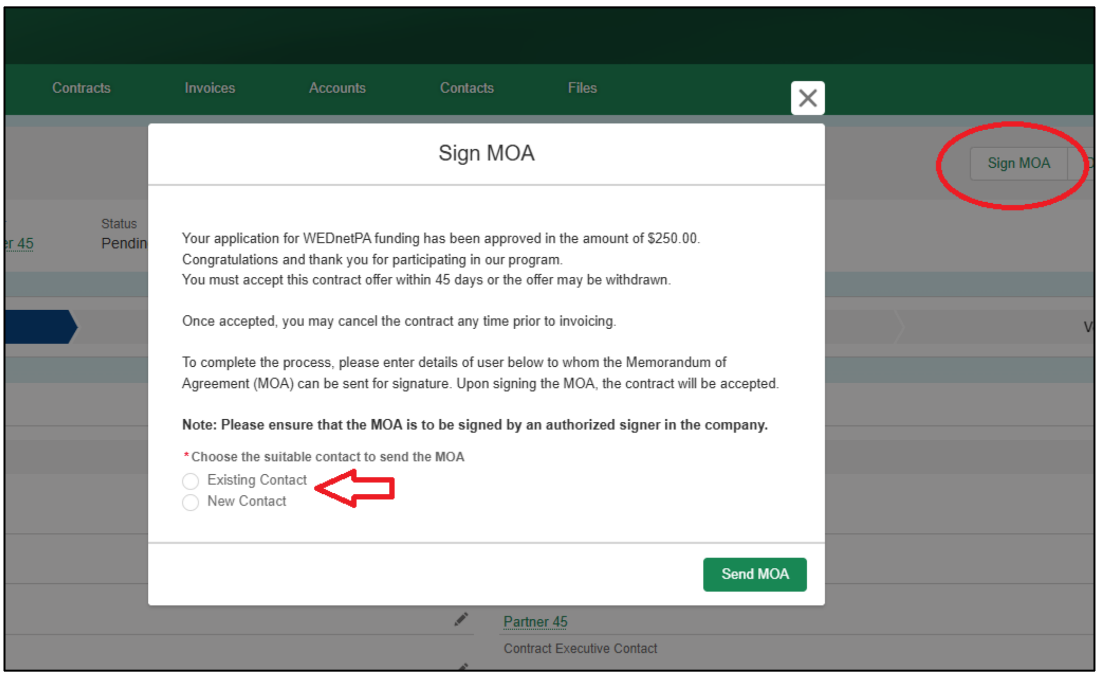


Contracts

How do I sign my Memorandum of Agreement (MOA)?

MOA must be executed for the contract to be accepted and to begin invoicing. Contract acceptance must be done within 45 days of the contract award date or risk losing funding.

Users must first select "Sign MOA" from the contract details page. A user will then be presented with a popup that will allow them to send the MOA to an existing user within the application or to a user that is outside of the system to electronically sign the MOA.



After sending the MOA:

1. Users will receive an email from Docusign.
2. Use the link embedded in their Docusign email to execute the MOA.
3. Checkbox the "I agree to use electronic records and signatures" box and press the Continue button.
4. Click on the Sign button.
5. Adopt your signature.
6. Adopt and Sign.
7. Press the Finish button in the upper right corner.
8. Press the Continue button.

9. Once the MOA is fully executed, the status of the contract on ISAAC will change from pending acceptance to In Contract and you will be emailed a copy of the fully executed MOA.

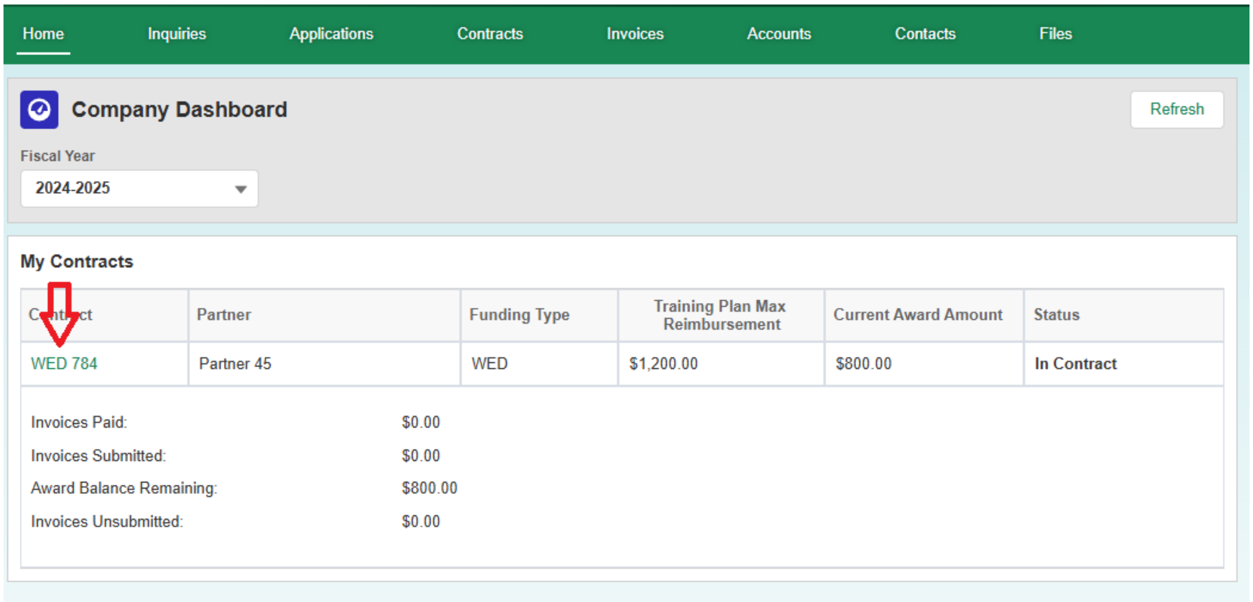
Can I send the MOA to someone other than myself?

Yes. Users must first select “Sign MOA” from the contract details page. The user will then be presented with a popup to send the MOA to a user that is outside of the system to electronically sign the MOA by selecting “New Contact” and then entering the signer’s email address.

MOA should be accepted within 10 days of contract approval date.

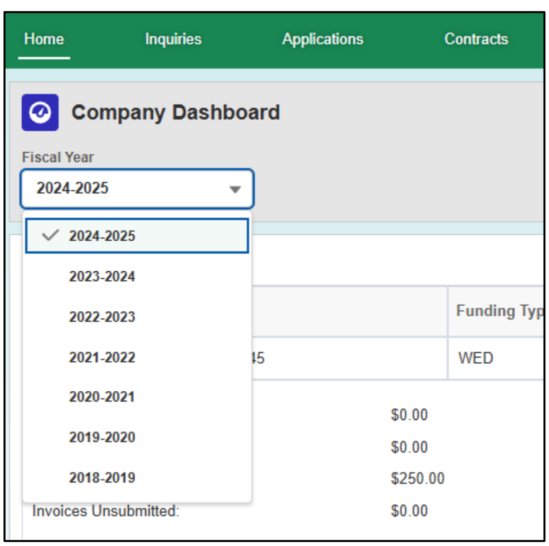
How can I view information about my contract?

Once an application is approved, users will see the active contract on their dashboard. High-level information will be available on the dashboard. A user can click on the Contract number to see the contract details.



How can I see previous years' information?

Users can view previous years' information using the Fiscal Year Dropdown on the Dashboard.



Invoicing Module:

We expect to have the invoicing module available in Spring 2025.

Questions: please contact your WEDnetPA partner directly; do not reply to any ISAAC generated emails from isaac@wednetpa.com as that mailbox is not monitored.