

ENgage – People

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This section of the system is where administrators can view the records of all individuals related to the organisation. It is only available to those with the correct access level.

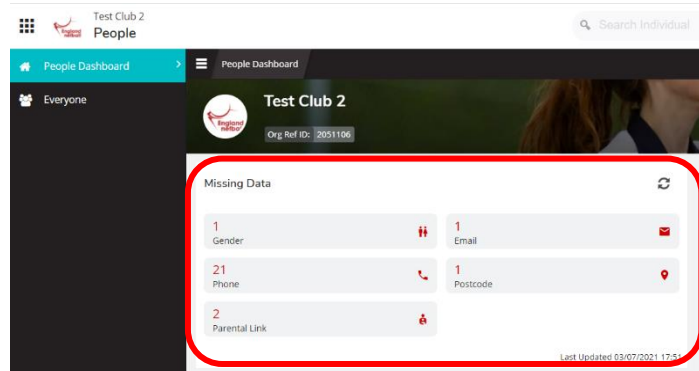
1 – People Dashboard

The People Dashboard provides an overview of the data relating to people associated with the organisation.

Missing Data

The Missing Data section of the **People Dashboard** indicates the data quality by highlighting where records are missing data.

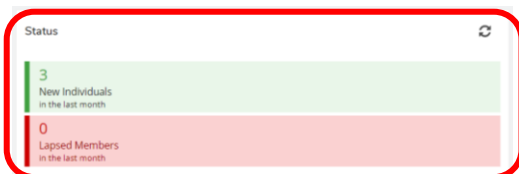
You can click through and access the specific records this relates to and if you have the appropriate access level (see Roles and Access Levels Guide) can update these to improve the data quality.



Status

The **Status** section of the **People Dashboard** indicates recent changes including new individuals in the last month and lapsed members.


You can click through and access the specific records these relate to.




2 – Everyone

The **Everyone** tab provides a table of all individuals linked to the organisation such as members, parents, coaches, volunteers etc. Here you can perform a number of functions, as follows.

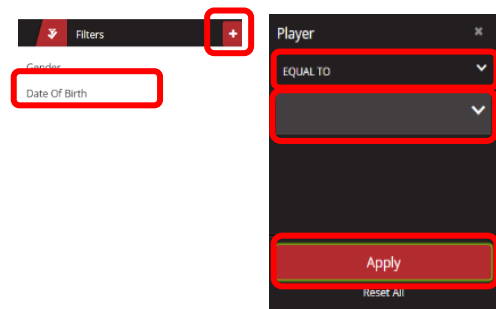
Search

You can use the search bar  to search for a specific individual. By default this searches by last name.


Filter

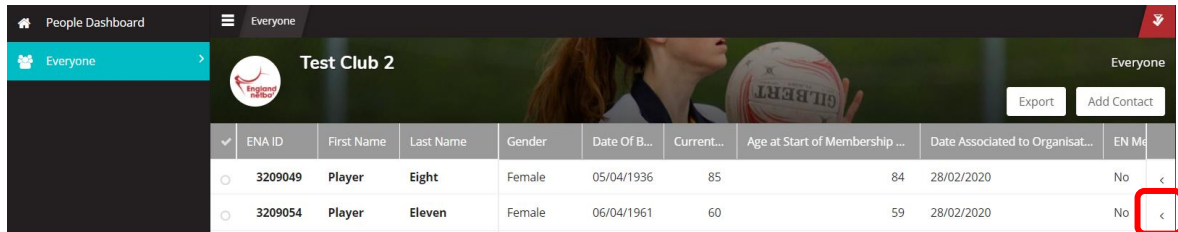
Using the funnel symbol  you can filter the contents of the table based on various parameters.

1. Select the plus + symbol to add a filter
2. Select from the list what you want to filter by
3. Select the rule you wish to filter with
4. Select or enter the filter parameter
5. Select **Apply**



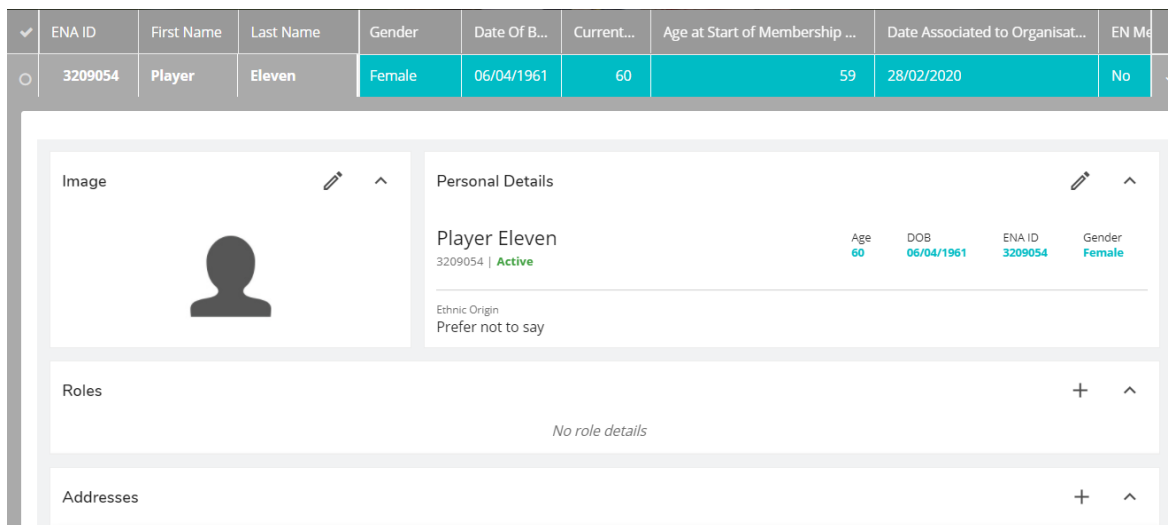
View Individuals Dashboard

You can view the summary dashboard of an individual through the table. To do this, click on the expander arrow  to the right of the record.




✓	ENA ID	First Name	Last Name	Gender	Date Of B...	Current...	Age at Start of Membership ...	Date Associated to Organisat...	EN Me	
<input type="radio"/>	3209049	Player	Eight	Female	05/04/1936	85	84	28/02/2020	No	<
<input type="radio"/>	3209054	Player	Eleven	Female	06/04/1961	60	59	28/02/2020	No	<

This will open up a summary of the individual's profile providing a snapshot overview of their information. From here, if you have the appropriate access level, you can perform some administrative functions e.g. edit details, add role etc.



✓	ENA ID	First Name	Last Name	Gender	Date Of B...	Current...	Age at Start of Membership ...	Date Associated to Organisat...	EN Me	
<input type="radio"/>	3209054	Player	Eleven	Female	06/04/1961	60	59	28/02/2020	No	▼

Image



Personal Details

Player Eleven
3209054 | Active

Age 60 DOB 06/04/1961 ENA ID 3209054 Gender Female

Ethnic Origin
Prefer not to say

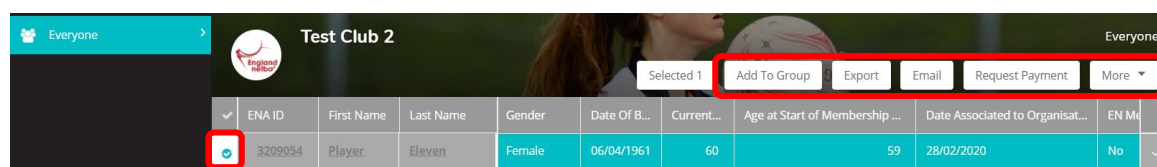
Roles

No role details

Addresses

Select

If you want to perform an action in relation to an individual(s), you can select them using the tick box to the left of their record.

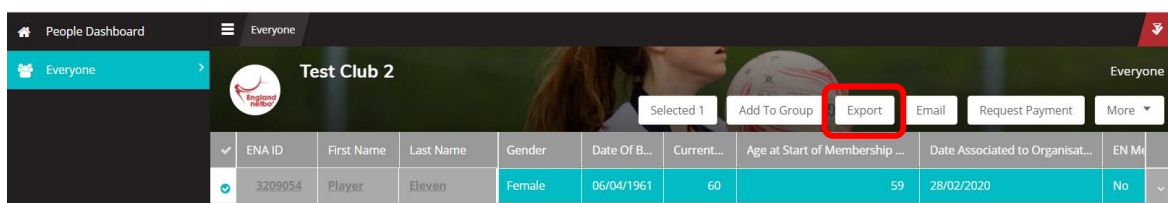


✓	ENA ID	First Name	Last Name	Gender	Date Of B...	Current...	Age at Start of Membership ...	Date Associated to Organisat...	EN Me	
<input checked="" type="checkbox"/>	3209054	Player	Eleven	Female	06/04/1961	60	59	28/02/2020	No	▼

Once you have selected a record(s), you can perform a number of actions using the buttons at the top of the screen.

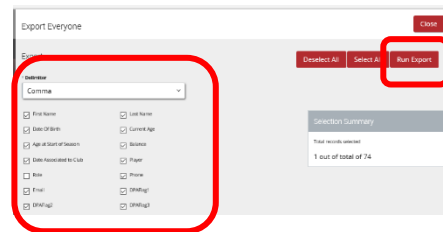
Export

Once you have selected a record(s), you can press the **Export** button in the top panel.



✓	ENA ID	First Name	Last Name	Gender	Date Of B...	Current...	Age at Start of Membership ...	Date Associated to Organisat...	EN Me	
<input checked="" type="checkbox"/>	3209054	Player	Eleven	Female	06/04/1961	60	59	28/02/2020	No	▼

You will then be asked to indicate what fields you want to be included in the export. Once you've indicated this by ticking the relevant boxes, click **Run Export**.



The system will then download a spreadsheet containing the selected records and details.

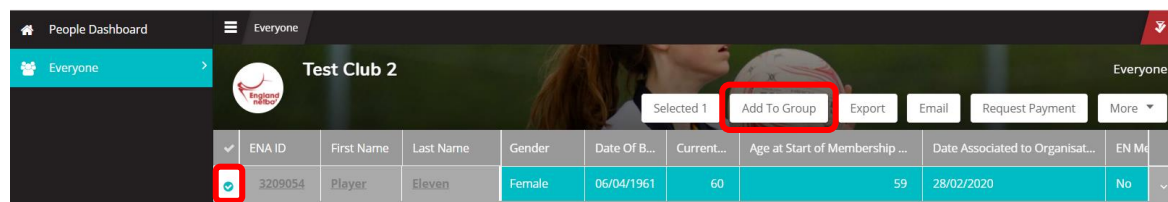
Group

You can create groups of records to help you administer your organisation. These groups will only be presented to you, they are not shared with other administrators within your organisation.

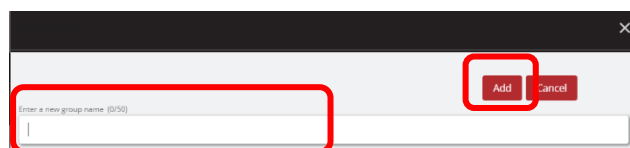
Create a New Group

To create a new group:

1. Select the individual(s) you want to be added to this group
2. Press **Add to Group**



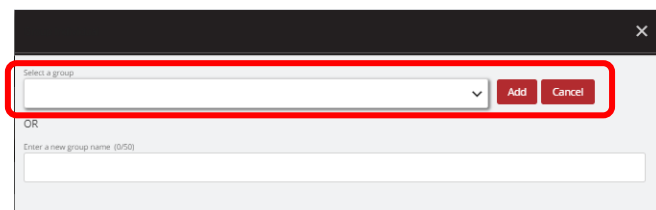
3. Add a name for a new group
4. Press **Add**



Add to Existing Group

To add an individual to an existing group:

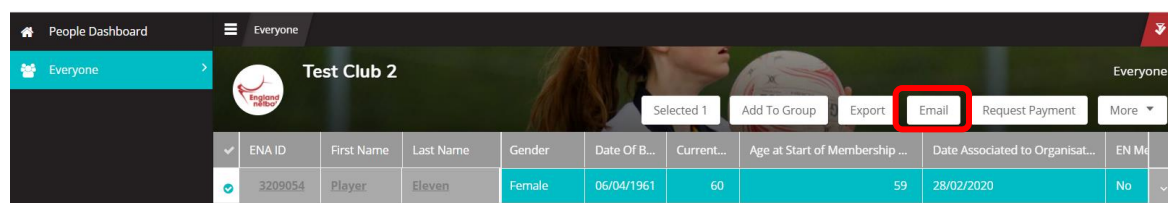
1. Select the individual(s) you want to be added to this group
2. Press **Add to Group**
3. Select an existing group from the dropdown list
4. Press **Add**



Email

Once you have selected an individual(s), you can send them an email through the system.

1. Select the individual(s) you want to email
2. Press **Email**



You will be presented with a window which provides an overview of the distribution list and allows you to create the email content.

3. Compose the email you wish to send
4. Press Send

Test Club 2 Compose Email

From Name: Test Club 2 Email From: 1312370@first-sports.com

To: Player Four

* Email Subject

Message Body

Enter text here...

☐ CC Sender on each Email
☐ Delivery Receipt
☐ Read Receipt

Selection Summary

1 Records selected
1 Adult records selected 100%

Data Analysis

1 Recipients in total
1 Recipients do not want marketing or promotional messages 100%

Attachments

* Attach Name

Where you have selected to send an email to a child the system will automatically send the same email to the Parent. There is a section in the email composer where it states why the parent is receiving the email. You are able to amend this section also.

Dear {{FullName}},
You are receiving this email as you are registered as the Parent/Guardian of {{Child_FullName}} and it is our policy to keep you informed of all communication.

Add Relationship

The ENGage system allows you to add relationships between people; this is important from a safeguarding perspective for children but also allows you to gain a better understanding of any relationships within your database.

It is important that you conduct the necessary GDPR check to ensure that the accounts should be linked together before doing so.

To create a relationship between two accounts:

1. Select two individuals records
2. Press **More**
3. Select the **Add Relationship** option

Test Club 2 Everyone

Selected 2 Add To Group Export Email Request Payment **More**

✓	ENA ID	First N...	Last Name	Gender	Date Of B...	Current...	Age at Start of Membership ...	Date Associated to	Buy Membership	Merge
<input type="radio"/>	3209049	Player	Eight	Female	05/04/1936	85	84	28/02/2020		
<input type="radio"/>	3209054	Player	Eleven	Female	06/04/1961	60	59	28/02/2020		
<input checked="" type="checkbox"/>	3209044	Player	Five	Female	03/03/1956	65	64	28/02/2020	No	<
<input checked="" type="checkbox"/>	3209043	Player	Four	Prefer to self c	01/03/1953	68	67	28/02/2020	No	<

Add Relationship

Remove From Club

4. Select the relationship between the individuals
5. Press Save

Add Relationship

Relationship


Player Four is the Relationship Type of Player Five

Business Contact
Child

Save Cancel

Adding Roles

You can add a role (other than Committee Roles) to an individual via their profile.

1. Expand the details of the individual by selecting  next to their record
2. In the **Roles** section select the + sign.

ENA ID	First N...	Last Name	Gender	Date Of B...	Current...	Age at Start of Membership ...	Date Associated to Organisat...	EN M...
3209049	Player	Eight	Female	05/04/1936	85	84	28/02/2020	No
3209054	Player	Eleven	Female	06/04/1961	60	59	28/02/2020	No

Player Eleven
3209054 | Active

Age: 60, DOB: 06/04/1961, ENA ID: 3209054, Gender: Female

Ethnic Origin: Prefer not to say

Roles
No role details

+

3. Select the role to allocate the individual
4. Press **Save**

Test Club 2
New Role

Full Name: Player Eleven
Organisation Name: Test Club 2

* Role

Job Title

Status: Active

* Valid From: 03/07/2021, Valid To:

Save

Remove from Club

This function allows you to maintain the organisations database in accordance with the retention period in the organisations privacy policy. However an individual may request that you remove them from your records before this or you may wish to remove them for another reason.

1. Select an individual(s) record
2. Press **More**
3. Select **Remove from Club**

✓	ENA ID	First N...	Last Name	Gender	Date Of B...	Current...	Age at Start of Membership ...	Date Associated to	
<input type="radio"/>	3209049	Player	Eight	Female	05/04/1936	85	84	28/02/2020	Buy Membership Merge Add Relationship Remove From Club
<input type="radio"/>	3209054	Player	Eleven	Female	06/04/1961	60	59	28/02/2020	
<input checked="" type="radio"/>	3209044	Player	Five	Female	03/03/1956	65	64	28/02/2020	No

4. Confirm that you want to remove them by pressing OK

Test Club 2

Changes

The Individual(s) displayed within the People Affected panel will be Removed from the club; all Memberships and Roles will be Archived.

People Affected (1)

Player Eleven

No Membership

OK **Cancel**

View Individuals Full Details

If you have the right access levels you can view the individual's full profile by clicking on their name

✓	ENA ID	First Name	Last Name	Gender	Date Of B...	Current...	Age at Start of Membership ...	Date Associated to Organisat...	EN Me
<input type="radio"/>	3209049	Player	Eight	Female	05/04/1936	85	84	28/02/2020	No
<input type="radio"/>	3209054	Player	Eleven	Female	06/04/1961	60	59	28/02/2020	No

What each column shows

The **Everyone** tab contains a summary of a range of information about individuals linked to the organisation as follows:

ENA ID – The individuals England Netball ID number. This is the number they will need in order to log into their ENGage account

First Name – the individuals first name

Last Name – the individuals last name

Gender – the individuals gender

Date of Birth – the individuals date of birth. This needs to be accurate to ensure that they are presented with the correct membership package options

Current Age – the age of the individual on the date you are viewing the data

Age at Start of Membership Year – the age of the individual on the 1st September of the current membership year

Date Associated to Organisation – this is the date the individual was linked with the organisation

EN Member – this indicates if the individual has an active England Netball membership for the current membership year regardless of which membership category and which organisation the membership was purchased through

Player – this indicates if the active England Netball membership the individual has purchased allows them to play/coach/officiate in competitions. E.g. *EN member* = Yes &

Player = Yes means they have purchased a full England Netball membership for their age category. *EN member = Yes & Player = No* means that they have purchased a Social and Supporting membership and are not eligible to play/coach/umpire but can be a committee member

Organisation Member – this indicates if the individual has an active membership purchased through the organisation directly. If the organisation sells club fee only membership packages there may be a scenario where an individual is an organisation member but not an England Netball member

Role – this column indicates any roles the individual has

Balance – this indicates the balance of any outstanding orders that have been raised for this individual with the organisation

Primary Club – this is the club identified as the individuals Primary Club. Some leagues require players to play for their primary club in the competition in order to be eligible

DBS – the DBS system is not yet linked to ENgage. Once this has been complete information about an individual's DBS status will be presented here

DBS Valid To – As above

Qualifications – this column lists all the qualifications the individuals has

Phone – the individuals phone number

Email – the individuals email address

Photo Consent – this column indicates if the individual has consented to their photo being used by any netball organisation they are linked to

Relationships – this column indicates if the individuals account has a relationship link to any other account