Engage
SUPPORTING THOSE WHO SERVE

Engage
Service Provider Guide

V2.1 20 November 2017

Contents

1 Introduction

1.1   Document Overview

This document provides Service Providers with an overview on how to register for Engage and create a profile for publication on the site.

This document walks through the key steps and explains how to enter and update information to ensure that your profile remains current, maximising the chances of users finding services that meet their needs.

1.2   Engage Overview

Engage is an online portal where users can search free services and support designed to benefit current and former ADF members; their families, and/or those involved in their support. Engage simplifies the process of accessing support by providing information on not-for-profit services available from a range of service providers.

Engage 'connects' users to support services based on different criteria including:

- Need
- Physical location – local, regional and national
- Service or support required

 Engage will readily link to a range of support and services from:

- Government, including Defence and Department of Veterans Affairs.
- Not-for-profit service providers and charities.
- Other service providers who choose to participate.

Engage will be operated by the Department of Defence, with data maintained by participating service providers.
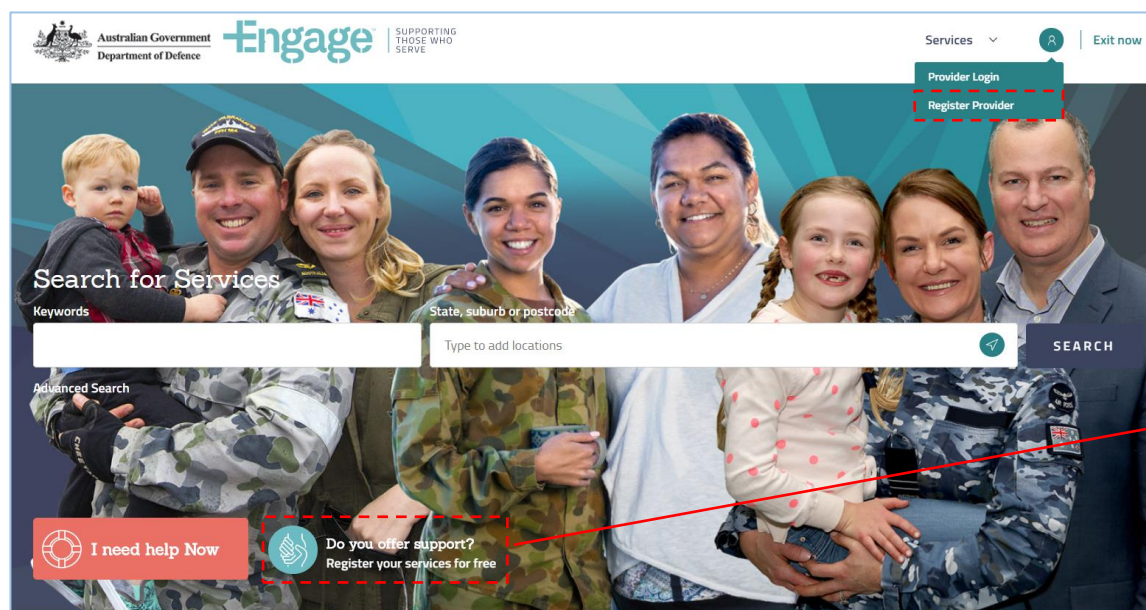
2   Registration

2.1   Overview

Registration is currently only available for Service Providers that provide free services to current and/or former ADF members and their families.

It is easy to register for Engage, and once registered, you have the ability to create your own profile on the site and list your services, free of charge.

It should be noted that only services your organisation offers to ADF members and their families for free, are allowed to be registered on the site.

Figure 1. Engage Home Page – Service Provider Registration

Register

Click either of these links to register for Engage.

Alternatively, you can also select 'Registration' under 'Service Providers' in the footer of the site.
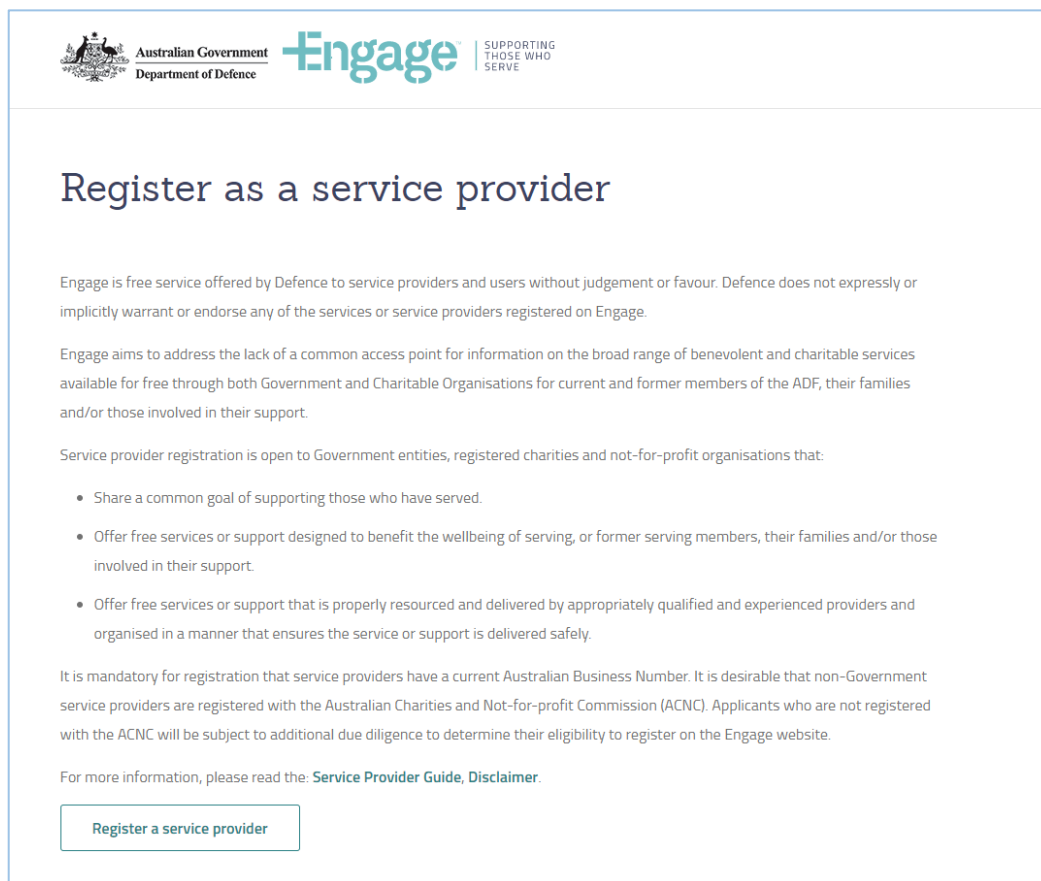
2.2   Registration Information Page

This page outlines basic Service Provider guidelines and relevant information, including links to the:

- Service Provider Guide; and
- Disclaimer.

Select the 'Register a service provider' button to proceed with registration.

Figure 2. Service Provider Registration Information Page

2.3　　Registration page

The site has an easy registration page that will prompt you if information is entered incorrectly.

The image below calls out a few specifics that may assist you in entering your information.

Once you select 'Register', you will receive an email to activate your account.

Once activated you can login and commence your profile creation.

All fields marked with a red asterix are mandatory and must be completed in order to progress your registration.

Registration Name

A unique registration name must be used. The site will not allow you to use the same name as another provider.

Please note that you can only user letters, numbers and spaces up to 100 characters. Special characters are not allowed.

For big organisations with sub branches consider adding extra information to your name like the state or district for each group.

Point of contact details

This information will not be publicly available and does not show up on the site, only Engage staff can view this information.

This information can be modified after registration if required.

Note: The system will not allow you to register using an email address already assigned to another Service Provider.

Organisation Type

Select the type of organisation you represent.

Each selection will present different registration fields to complete.

ABN

An ABN must be provided in order to register as a Service Provider.

Set password

Set your password here. Your password must be at least 8 characters long and contain a mix of upper and lower case characters and numbers.

① *Mandatory fields

Enter service provider details

Do you represent an organisation that provides free services to current and/or former ADF members or their families?

◉ Yes　　◯ No

☐ I confirm I have checked to see if my organisation has already registered *

What type of organisation do you represent?
◯ A registered charity or not-for-profit organisation
◯ My organisation is a Government department or agency
◯ Other

Service Provider's Name (100 characters max) *

Service Provider's ABN (11 digits required)

Key point of contact details

This contact information will not be displayed on the website. It is for your account management purposes only and will only be visible to the Department of Defence Site Administrators.

First Name *

Last Name *

Email *

Phone *

Mobile Phone

Set password

Please create a new password for your Engage account.

Your password must be at least 8 characters long and contain a mix of upper and lower case characters and numbers. Maximum 15 characters

Password *

Confirm Password *

Register

Figure 3. Service Provider Registration Page

Registration Successful
You should see this message if you have registered successfully.

The next step is to check your nominated email account for the Activation email titled 'Engage Registration – Account Activation'.

If the email doesn't show up in a few minutes make sure to **check your spam/junk folder.**
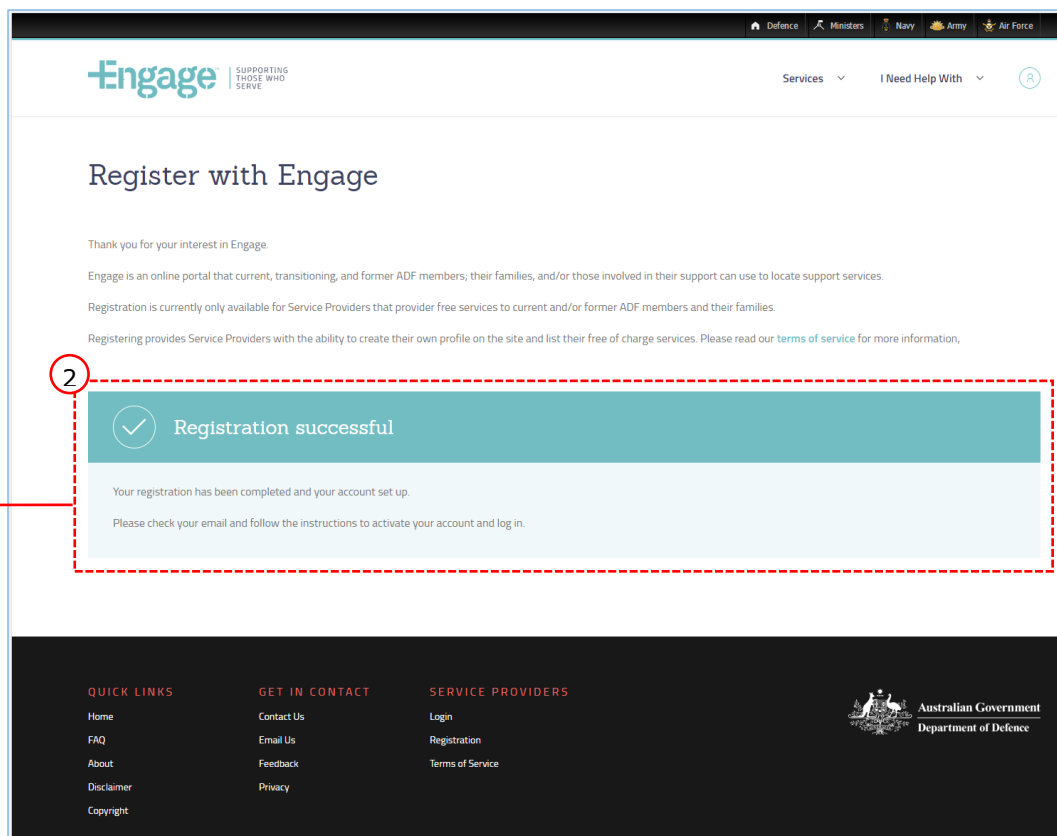
Figure 4. Registration Successful

Activate Account
Click here to activate your account and complete the registration process.

Figure 5. Registration Email

Activation Success
Once you have clicked the link in your activation email, you should see this page.

Login
You can now login here using the information entered during registration.

Figure 6. Service Provider Login Page

Service Provider Features
Once you are logged in, click on this icon at any time to:

- Manage your Profile;
- Edit your Account Settings; and
- Logout.
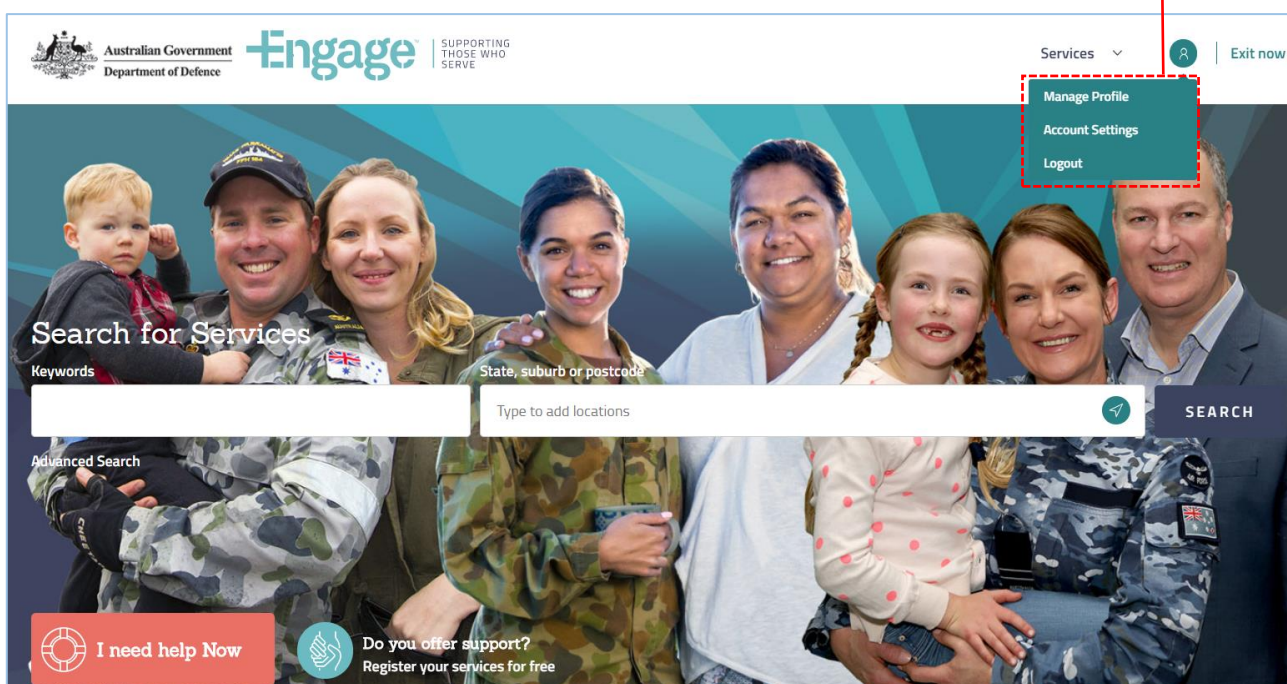
Figure 7. Service Provider Menu

3 Manage your Profile

3.1 About Us profile page

When you first login you will see your main profile page which has the following elements to it.

As a minimum your Profile must have a tagline, abstract, overview and at least one service prior to being able to submit it for publishing.

Service Provider Banner

Service Provider Icon

Welcome Text

Overview Information
Information entered here will appear on your 'About Us' page of your profile on the site.

Main Contacts
Here you select your main office, phone number and website once you have entered some. These will also show up on your 'About Us' page.

Useful Links
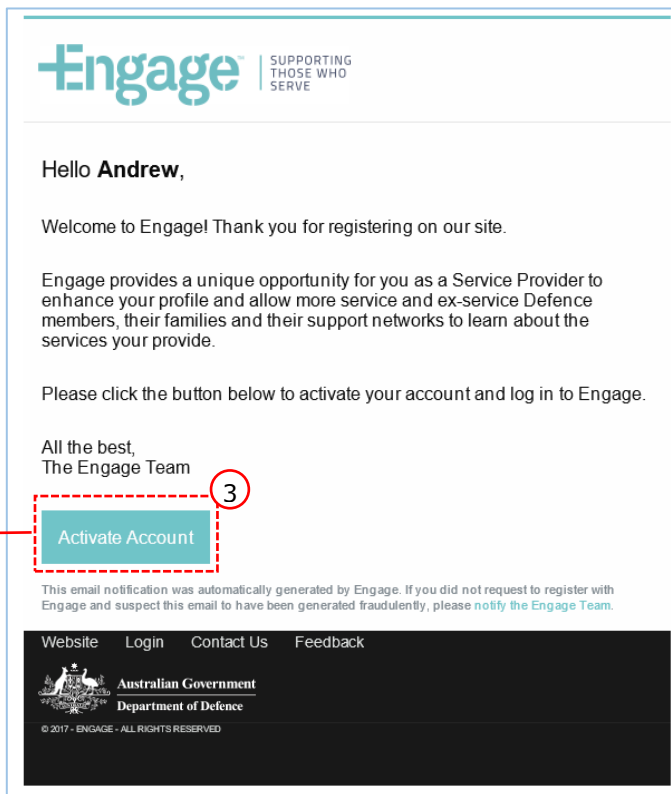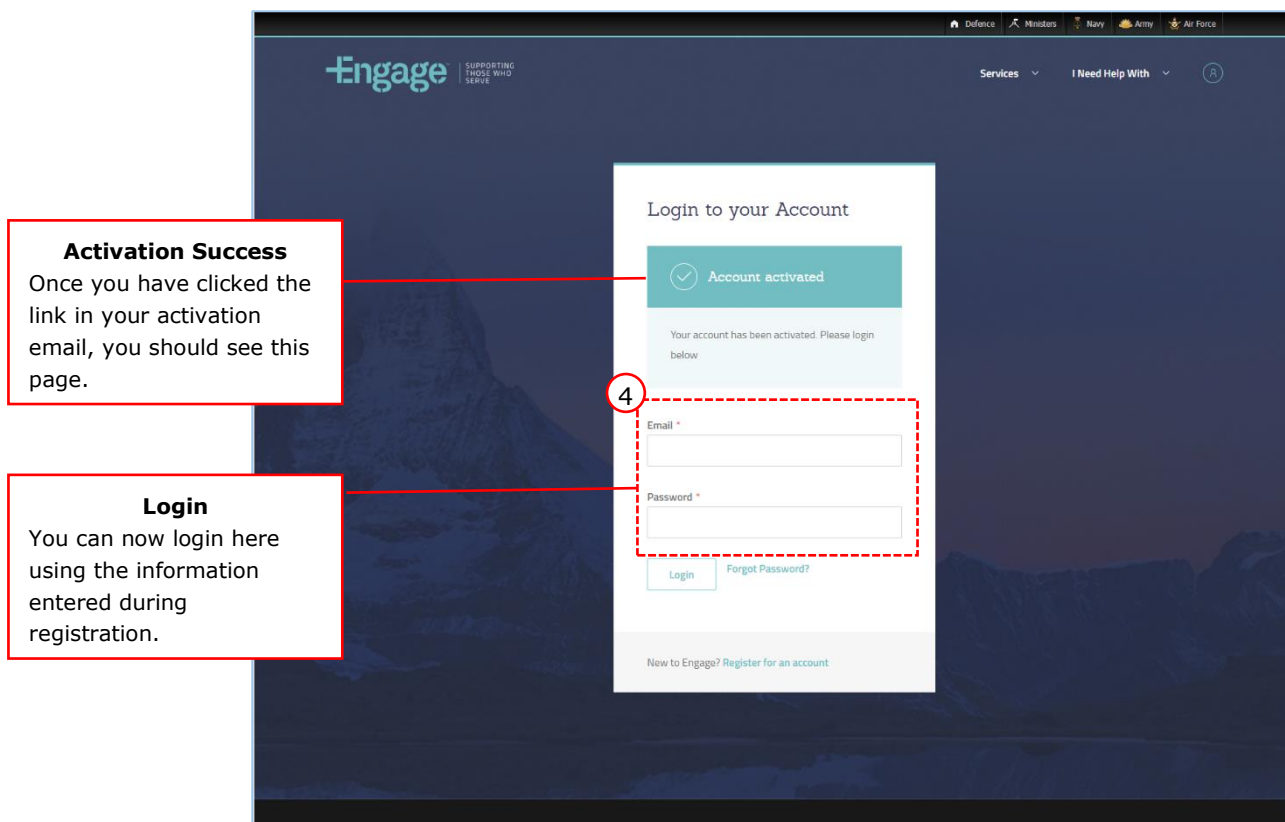You can add additional webpages here for inclusion on your 'About Us' page. These could include links to your social media accounts or particular pages on your own website you think are important.

Profile Health Module
Contains handy tips on what is left to fill out in your profile.

Publishing
You can see what your profile will look like when published as well as publish here too.

Note: The publish button will be disabled until you have finished all the mandatory 'Things to do' or if you have no outstanding edits to publish.

Profile Menu Navigation
This is how you navigate around elements of your profile. Just click the required menu item and it appears highlighted.

Figure 8. 'About Us' Profile Page

3.2 Overview section

The overview section on your main Profile page has the following elements:

- Tagline;
- Abstract; and
- Detailed Overview.

These are mandatory fields, meaning you must complete these prior to being able to submit your Profile and Services for publishing on Engage.

Tagline

The Tagline field should be used to enter your organisations motto, catchphrase or slogan. For example Nike's tagline is 'Just do it'.

Note this is mandatory information for your profile so once entered you can't delete it completely but you can change it.

Character Limit = 100

Overview

Tagline	Edit
You have no tagline yet. Want to add one?	

Abstract	Edit
You have no abstract yet. Want to add one?	

| Overview | View/Edit |

Figure 9. Overview Section

Abstract

The abstract field should be used to enter a very brief description of your organisation. This will appear on each of your services to give the users a snapshot of your organisation and what you are attempting to achieve.

Note this is mandatory information for your profile so once entered you can't delete it completely but you can change it.

Character Limit = 200

Detailed Overview

The detailed overview section loads in a separate page and allows you to enter a lot more information about your organisation. (see next page)

3.3   Detailed Overview page

The Detailed Overview page allows you to enter a detailed description of your organisation.

You can also format this information using the basic controls shown in the text box.

Take care to review what you type in this fields as this will form the main body of information to describe your organisation.

Figure 10. Detailed Overview Page

Detailed Overview
You can enter a detailed description of your organisation here and format it using the controls at the top of the text box.

Click 'Update' to save any changes. If you wish to abandon changes just navigate somewhere else

Once entered this will show on your 'About Us' page.

Note this is mandatory information for your profile so once entered you can't delete it completely but you can change it.

Character Limit = 2000

Navigation
Notice you are on the 'Overview' tab now. Click 'About Us' to get back to the main page.

3.4   Services page

The Services page allows you add and edit services on your profile.

Services require at least one office, webpage or phone line linked to them so you can either create these first or create them on the fly as you fill out your service.

In order to publish your Profile, you need to have listed at least one Service as a minimum.

If your organisation provides multiple types of Services (i.e. Advocacy, Financial Assistance, Counselling), be sure to list these individually to assist users in locating relevant Services quickly.

Note: The addition of any new Services to your Profile will require Engage Administrator review prior to being published to the site.

Figure 11. Services Page

Service Listing
Your list of services will show here once added. Click 'Add' to add a new service.

Navigation
Notice you are on the 'Services' tab now. Click 'About Us' to get back to the main page or select a different tab if you want.

Add Service

Service Name
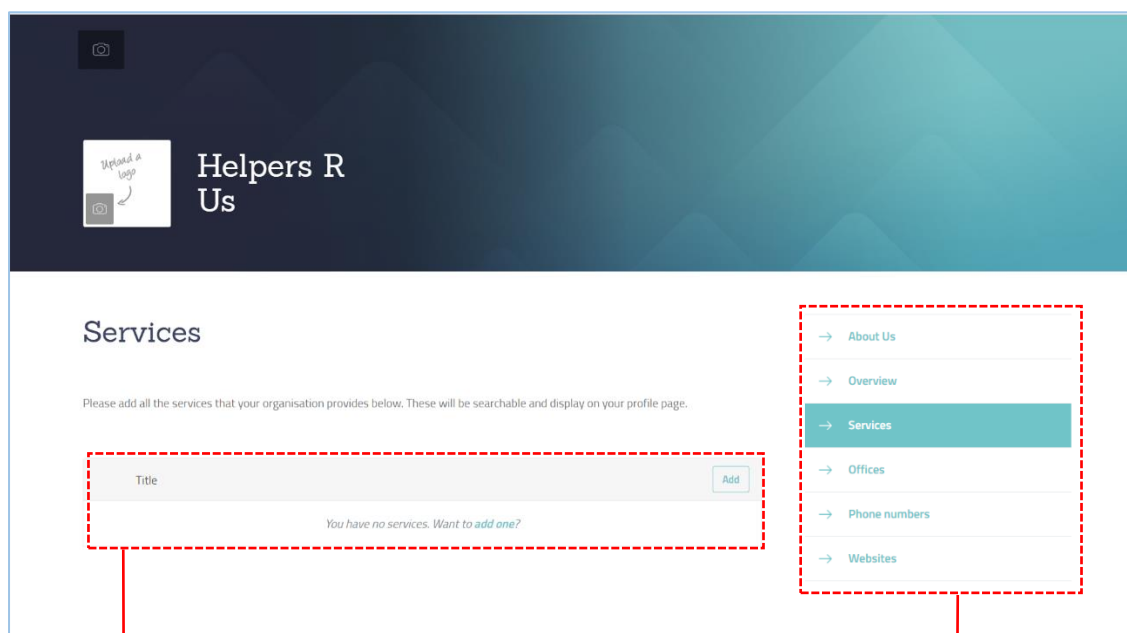Enter the name of your service or program

Character limit = 50

Service Name *

Service Description
Enter a description of your service or program. Please note that words included will match keyword searches.

Character limit = 2000

Service Description *

Service Type Selection *

☐ Select all

☐ Emergency Support   ☐ Staying Active

☐ Financial and Legal Support   ☐ Employment Services

☐ Claims Help   ☐ Partners, Parents and Families

☐ Counselling   ☐ Health Care

☐ Other

Category Selection
Select which categories your service is applicable to. These categories are used when users search for services.

Use the drop-down arrow to the right of the main category to select specific sub-categories.

Select and order point of contacts for this service

Please select which offices, phones and webpages are relevant to your service. Once you have selected these they can be ordered based on how you would like them displayed on your profile page. Note that when the user searches for services the closest contact point will always be displayed first.

Offices

Title	City	
		Select

You have no offices selected. Want to *select some*?

Websites

Title	URL	
		Select

You have no websites selected. Want to *select some*?

Phone

Title	Number	
		Select

You have no phones selected. Want to *select some*?

Points of contact
As a minimum, each Service requires at least one of the following:

- Office,
- Website; or
- Phone Number.

Select which offices, websites and phone numbers are relevant for your service.

If you choose to link a website to your Service, be sure to provide a link to the most relevant page of your website applicable to the specific service. This will assist users to locate relevant information quickly.

Submit   Cancel

Figure 12. Add Services Page

Select points of contact
This pop-up will appear when you click 'Select' on any of Point of Contact.

From here, you can select your points of contact or click 'Add' to create some if you haven't already.

Select a value   ✕

Add

You have no offices to choose from. Want to *add one*?

Cancel   Update

3.5   Offices page

On this page you can add and edit offices for your profile. Once created they can be linked to services or selected as your 'Main Office' on your 'About Us' page.

When entering Office locations it is important to include a physical location, not a PO Box as this address is used in geolocational searches to allow users to find Services in their area.
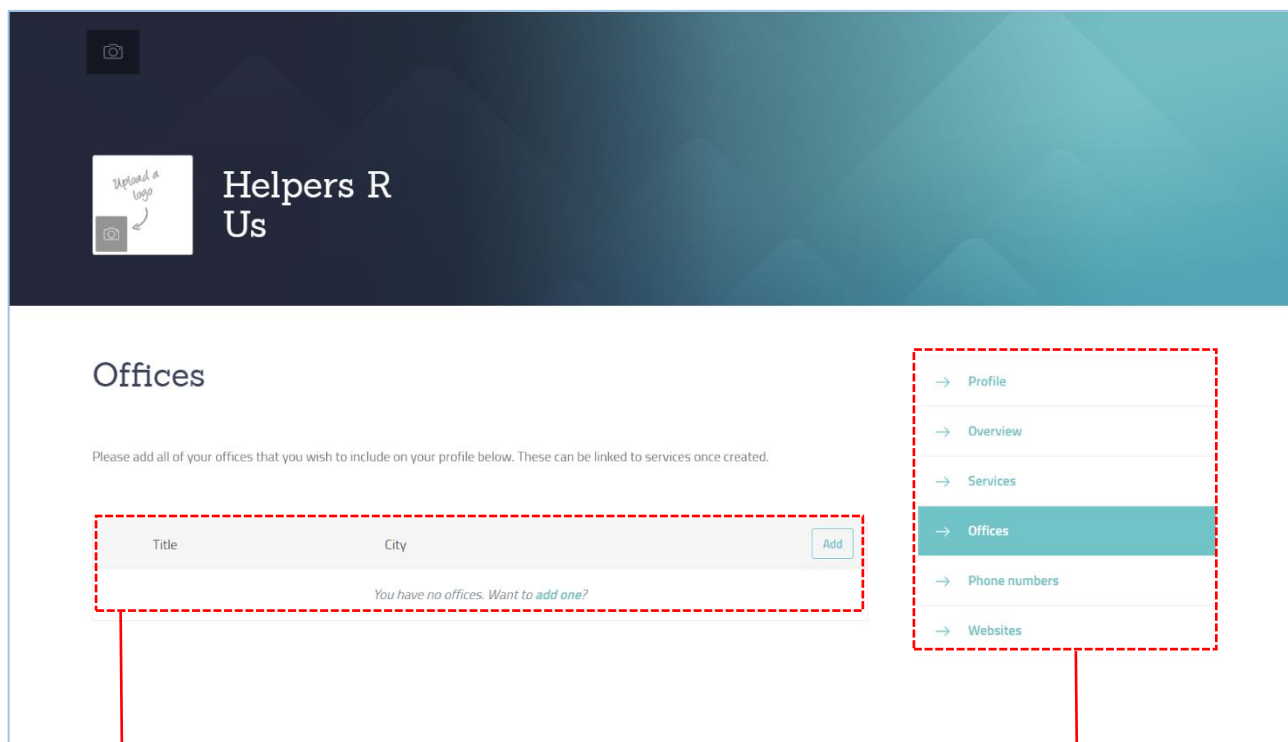
Figure 13. Offices Page

Office Listing
Your list of offices will show here once added. Click 'Add' to add an office location.

Navigation
Notice you are on the 'Offices' tab now. Click 'About Us' to get back to the main page or select a different tab if you want.

Office Title
Enter an office name here

Max Characters = 40

Street Address
Enter a physical street address here. PO boxes should not be used.

Note that this address is checked against Google Maps to enable geo-location matching on search.

If you get an 'Address not found' error when attempting to save please check to see if it can be found in Google Maps. If it can't please try refining it. For example, if you have a 'building' or 'floor' in your address try leaving this off.

City
Type your suburb in here and select an option from dropdown.

Phone numbers
The site only allows Australian phone numbers.

If entering a landline please include the area code.

Create office

Office title *

Please enter a title that easily allows you to identify and distinguish the office from line from others.

Street address line 1 *

Street address line 2

City *

Type to find a location

Office e-mail *

Office phone *

Office mobile

Cancel   Save

Figure 14. Add Offices Page

3.6   Phone numbers page

On this page you can add and edit phone numbers for your profile. Once created they can be linked to services or selected as your 'Main Phone Number' on your 'About Us' page.
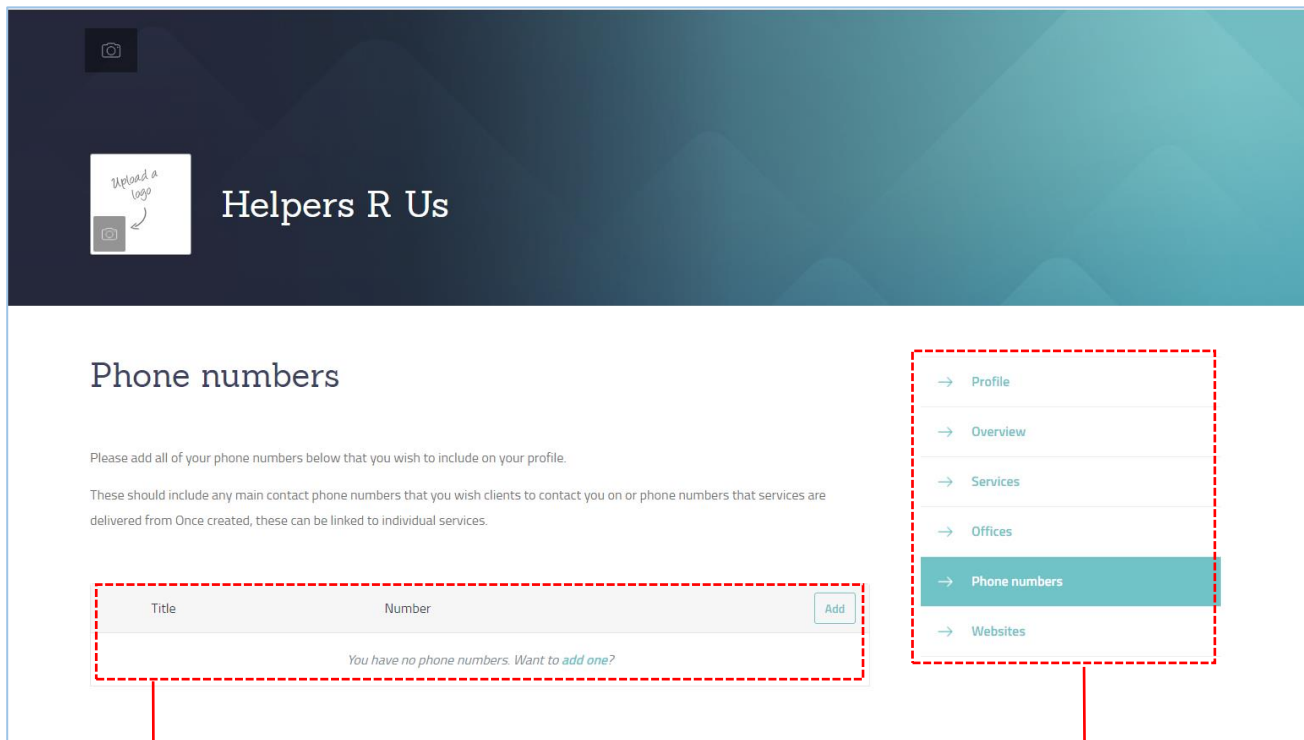
Figure 15. Phone Numbers Page

Phone numbers listing
Your list of phone numbers will show here once added.
Click 'Add' to add a phone number.

Navigation
Notice you are on the 'Phone numbers' tab now. Click 'About Us' to get back to the main page or select a different tab if you want.

Phone Title
Enter a phone title here.

Max Characters = 50

Phone numbers
The site only allows Australian phone numbers. If entering a landline please include the area code.

State selection
Select which states that this phone line is applicable to.

When a user does a location based search for services this phone line will then show for the selected states.

For example if you have a number that you want your clients in WA to call and a different number for NSW then create two phone lines and select the appropriate states.

Create phone lines ✕

Phone title *

Please enter a title that easily allows you to identify and distinguish the phone from line from others. This title is not visible to the public.

Phone number *

eg (03) 9555 5555

Location(s) *

☐ Select All

☐ ACT

☐ NSW

☐ NT

☐ QLD

☐ SA

☐ TAS

☐ VIC

☐ WA

Cancel   Save

Figure 16. Add Phone Lines Page

3.7   Websites page

On this page, you can add and edit websites for your profile. Once created they can be linked to services or selected as your 'Main Website' on your 'About Us' page.

If linking a website to a specific Service, we recommend you provide the link directly to the page where information relevant to that Service is located. Try not to link Services to your website homepage as it may be difficult for users to locate the information relevant to them and the chosen Service.
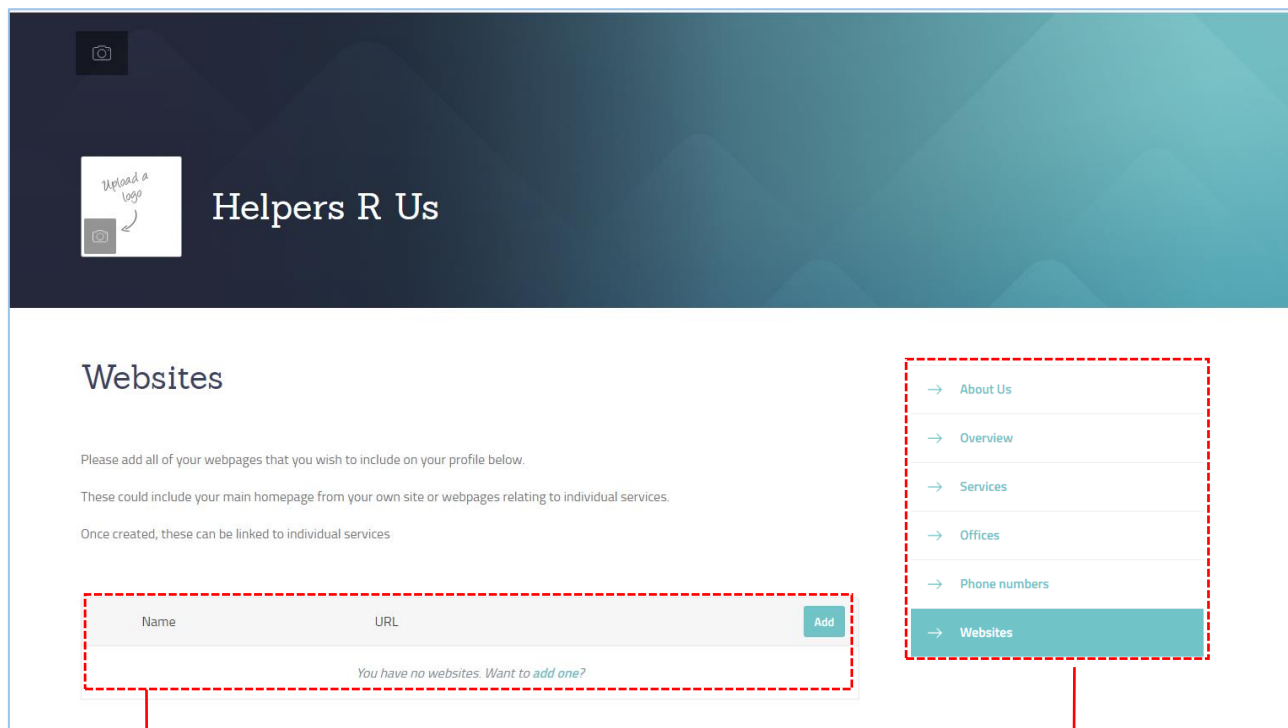
Figure 17. Websites Page

Websites listing
Your list of websites will show here once added. Click 'Add' to add a new website.

Navigation
Notice you are on the 'Websites' tab now. Click 'About Us' to get back to the main page or select a different tab if you want.

3.8   Updating Images

Your profile also has the ability to add an icon and banner image.

Click on the corresponding camera icons at the top of your profile to upload images.

Images must be less than 2MB in size have the following minimum pixel sizes.

Minimum Image sizes

Icon image = 100 x 100 pixels

Banner image = 1000 x 200 pixels

Note: By uploading an image to Engage, you confirm that your organisation has appropriate licencing and or permission to use that image.

Update / Remove Images
Once you have uploaded an image you can always upload a new one or remove your existing one.

Just click on the camera and then click an option from the dropdown.
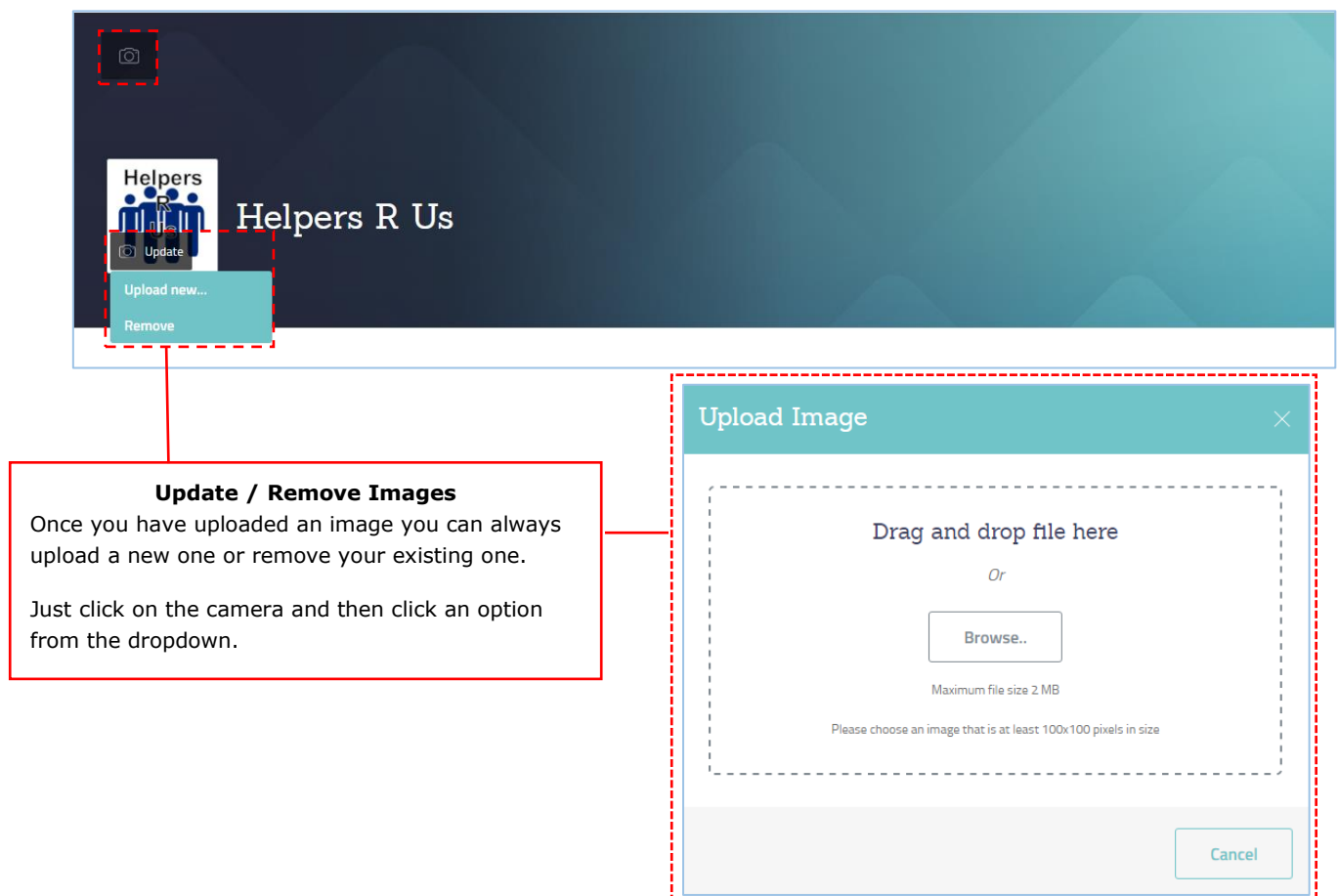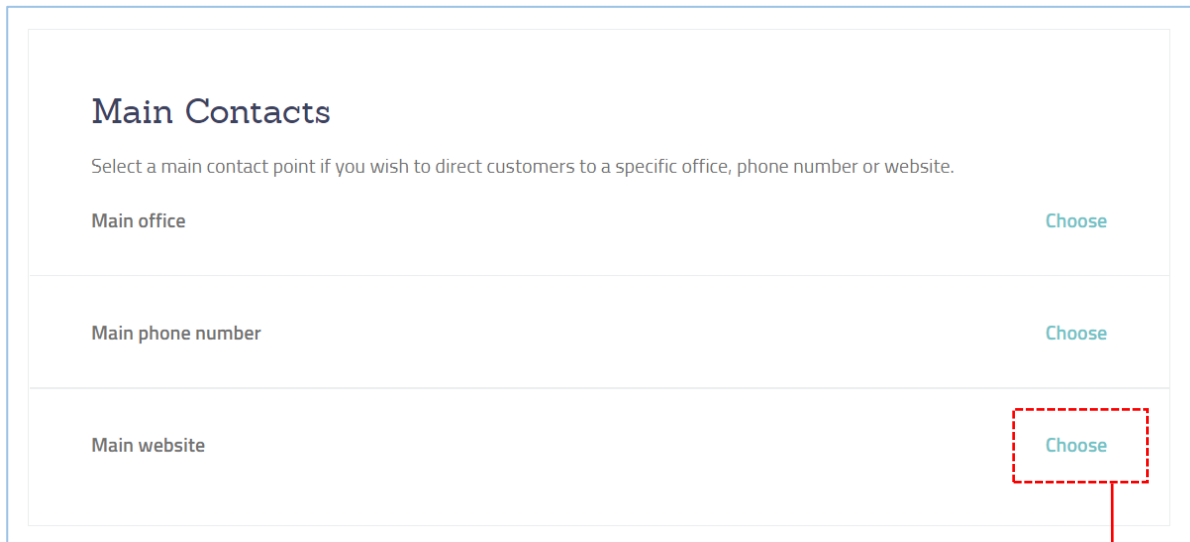
Figure 18. Upload Image Prompt Box

3.9   Main Contacts section

This section allows you to select the main contacts for your organisation, including:

- Main office;
- Main phone number; and
- Main website.
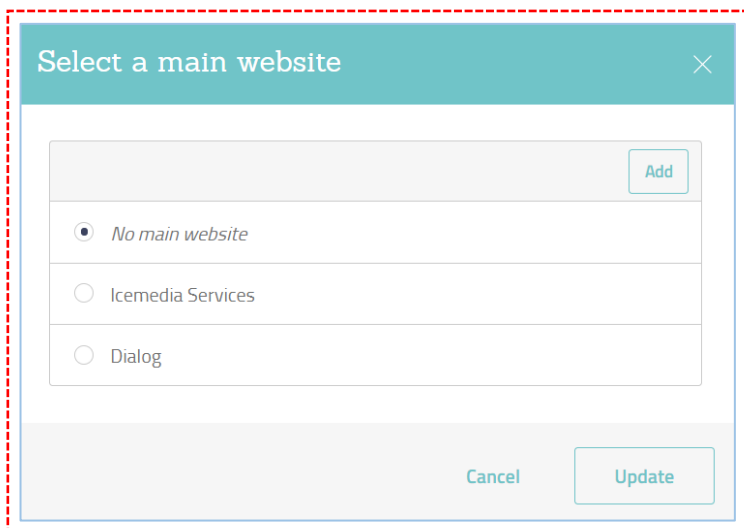
These details will be displayed to the right-hand side of your organisations 'About Us' page.

Figure 19. Main Contacts Section

Choose
You have the option to select existing contacts or create new ones as required.

3.10   Useful Links section

You can add additional webpages here for inclusion on your 'About Us' page.

These could include links to your social media accounts or particular pages on your organisations website you think are important.

Figure 20. Useful Links Section

Useful Links
Click 'Add' to create a new link.

Your list of useful links will display here once added.

3.11   Preview and publish your profile

Once you have completed all the elements of you profile you can choose to preview how it would look or publish it straight away.

On the 'About Us' main page of your profile, you'll see a 'Preview' and a 'Publish' button under 'Publish Profile' to do this (as shown in images below).

Once you have submitted your profile for review an Engage Admin staff will be notified and this should be completed within 3 working days. Once approved you will receive an email and your profile will be published on the site for public view.

Note: You can continue to make changes even after you have submitted it for review. Just remember to click 'Publish' again and submit these changes. The Engage Admin staff will review the latest copy of your profile.
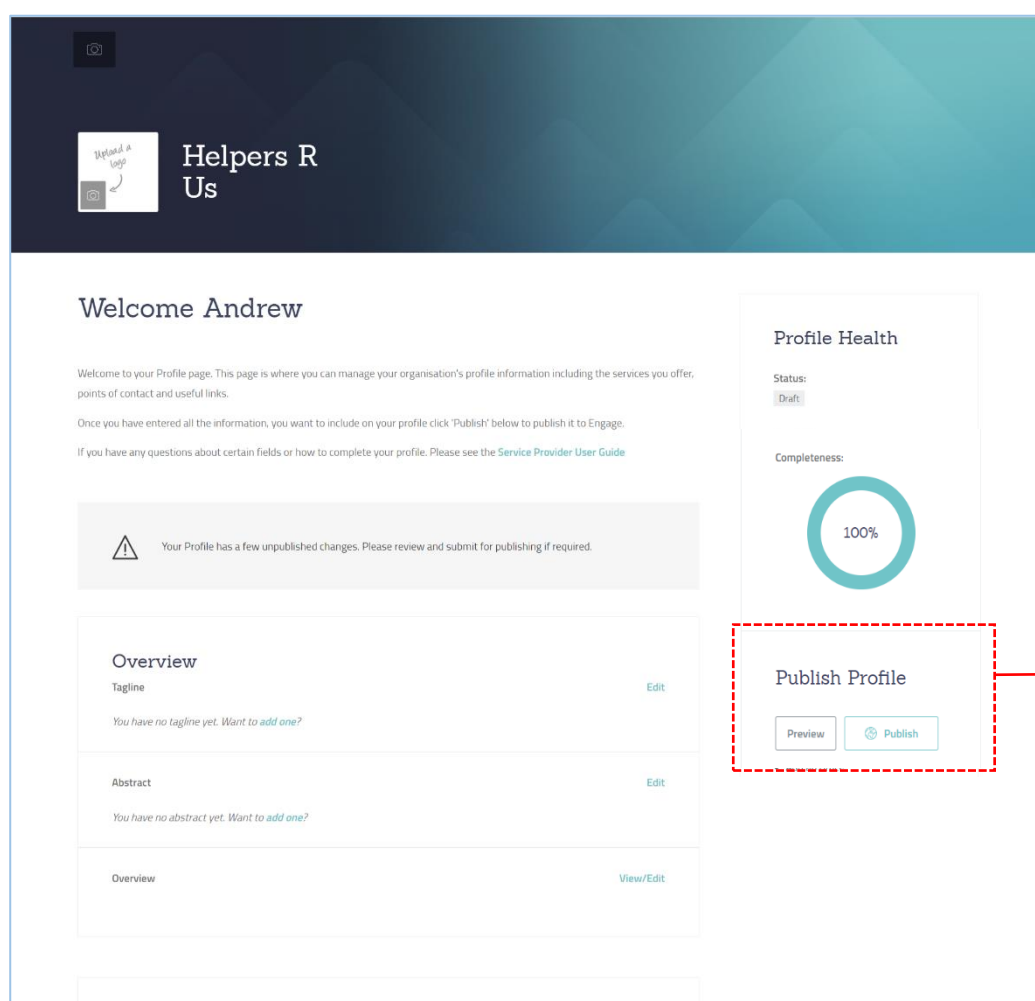
Preview / Publish Profile

Here you can click 'Preview' to see what your profile will look like when published.

Once you are ready to publish, click 'Publish' and follow the prompts.

If this button is greyed out and unavailable for selection, it means you still have items left to complete from your 'To Do' list before you are allowed to submit your Profile for publishing.

Figure 21. 'About Us' Profile Page

Submit Profile

→ Profile

→ Overview

→ Services

→ Offices

→ Phone numbers

→ Websites

✓ **Profile successfully submitted**

Thank your for submitting your profile

Please allow up to 3 business days for a site administrator to you review your profile.

If you need to make changes in the meantime. Please update your profile and resubmit.

Back to dashboard

Figure 22. Profile Submitted Successfully

Welcome Andrew

Welcome to your Profile page. This page is where you can manage your organisation's profile information including the services you offer, points of contact and useful links.

Once you have entered all the information, you want to include on your profile click 'Publish' below to publish it to Engage.

If you have any questions about certain fields or how to complete your profile. Please see the **Service Provider User Guide**

⚠ Your Profile is currently in the process of being reviewed by our Site Administrators before publishing. This review process is usually completed within three business days.

You will be notified via email once the review is complete.

If you wish to make changes to your profile while waiting for a Site Administrator to review, you can Edit fields as normal and click 'Publish profile'. Your profile will automatically be updated before review.

Profile Health

Status:
Pending

Completeness:

100%

Publish Profile

Preview   ⊛ Publish

Under Review
Once you have submitted your profile for review your profile will display this message on the main 'About Us' page.

This will update to Published when your profile has been approved by the Engage Administrator. Stay tuned for the approval email and remember it could appear in your junk folder.
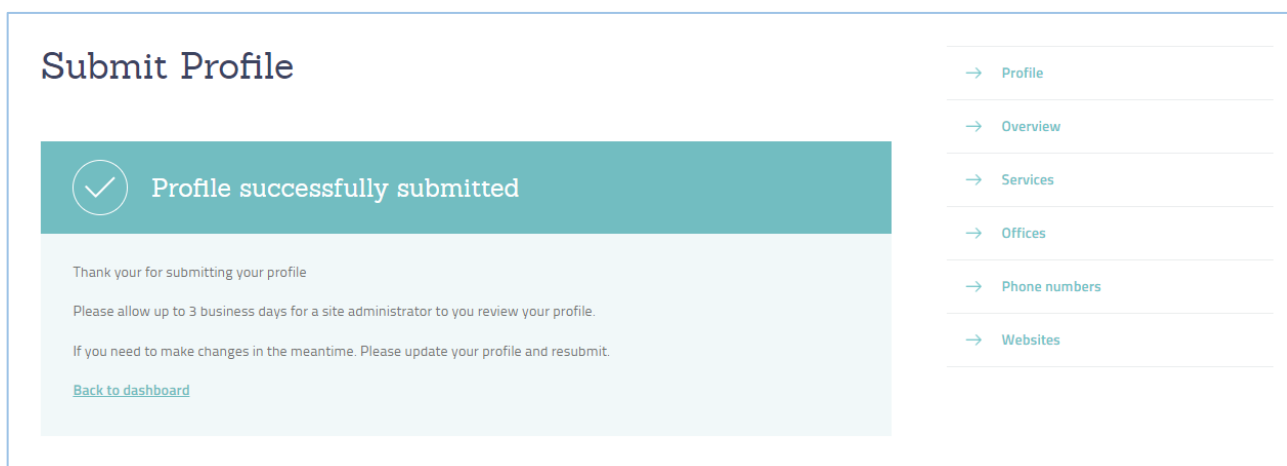
Status
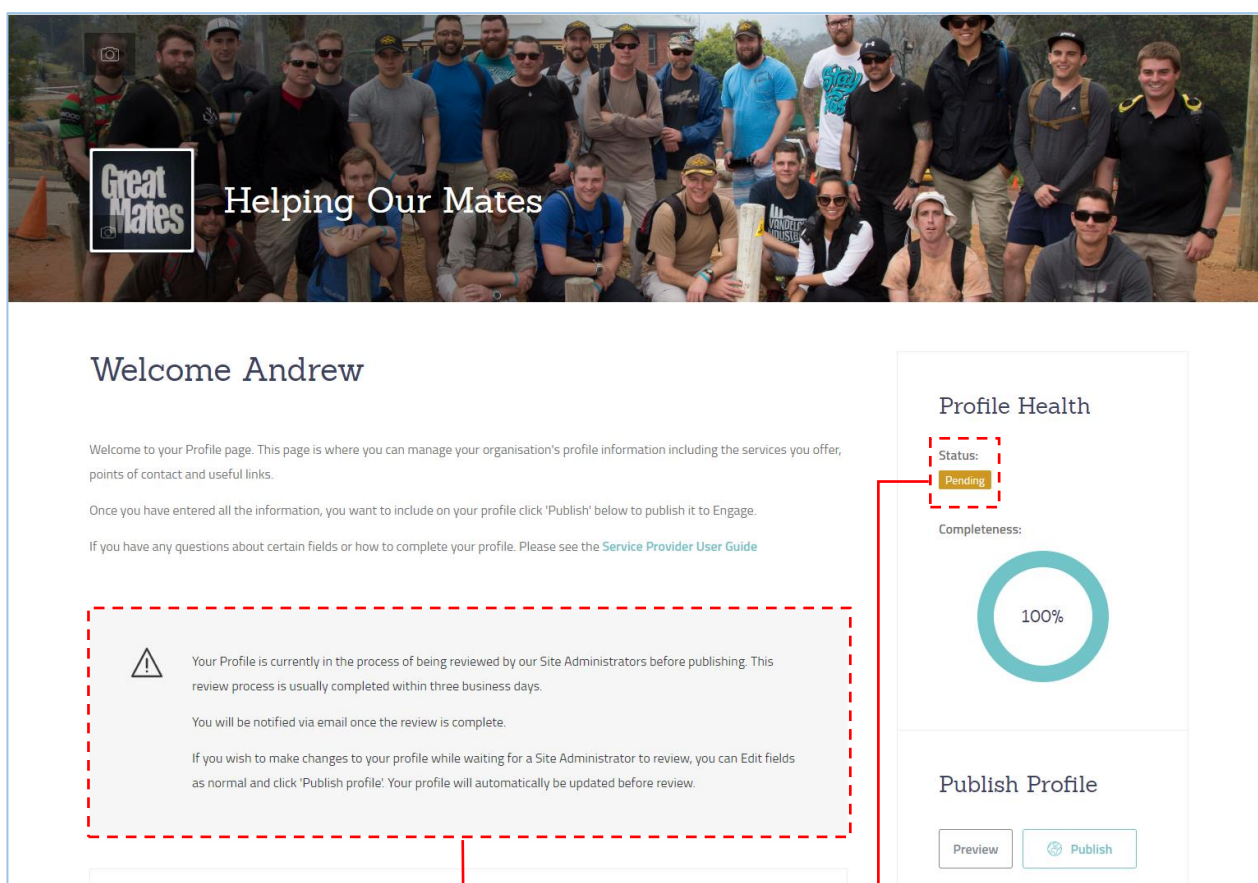Status will display as 'Pending' until your Profile is approved for publishing.

Figure 23. Service Provider Profile Under Review

4 Account Management

4.1   Account Settings

You may need to update your account information sometimes including your contact information or your password. A common example of this is if you are handing over the management of you organisations profile to someone else.

This can easily be done through the sites 'Account Settings' functionality as shown in the following images.

Account Settings
Once you are logged in, click on this icon and then 'Account Settings'.
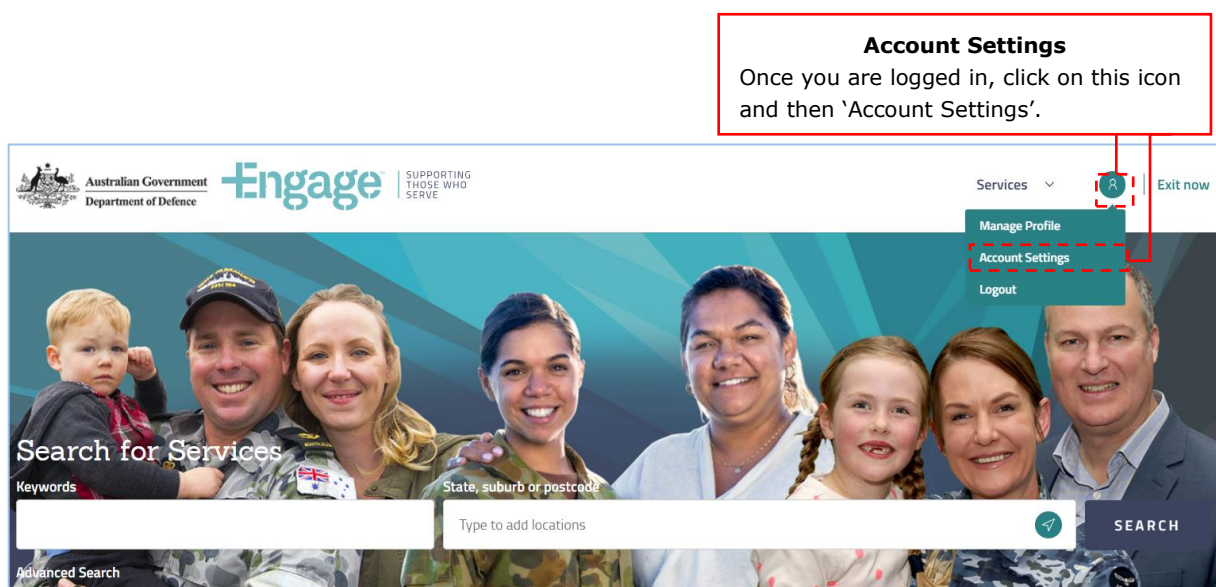
Figure 24. Service Provider Menu – Account Settings

Current Password
For security reasons your current password must be entered to make changes to your account.

Update details
Here you can update all your contact detail associated with your account. Useful if you are handing over the management of your organisation's profile to someone else.

Navigation Menu
Note you are on the 'Account' settings page.

Click 'Change Password' to navigate to that section.

Figure 25. Change Contact Details Page

Current Password
For security reasons your current password must be entered to make changes to your account.

Update details
Here you can update your password.

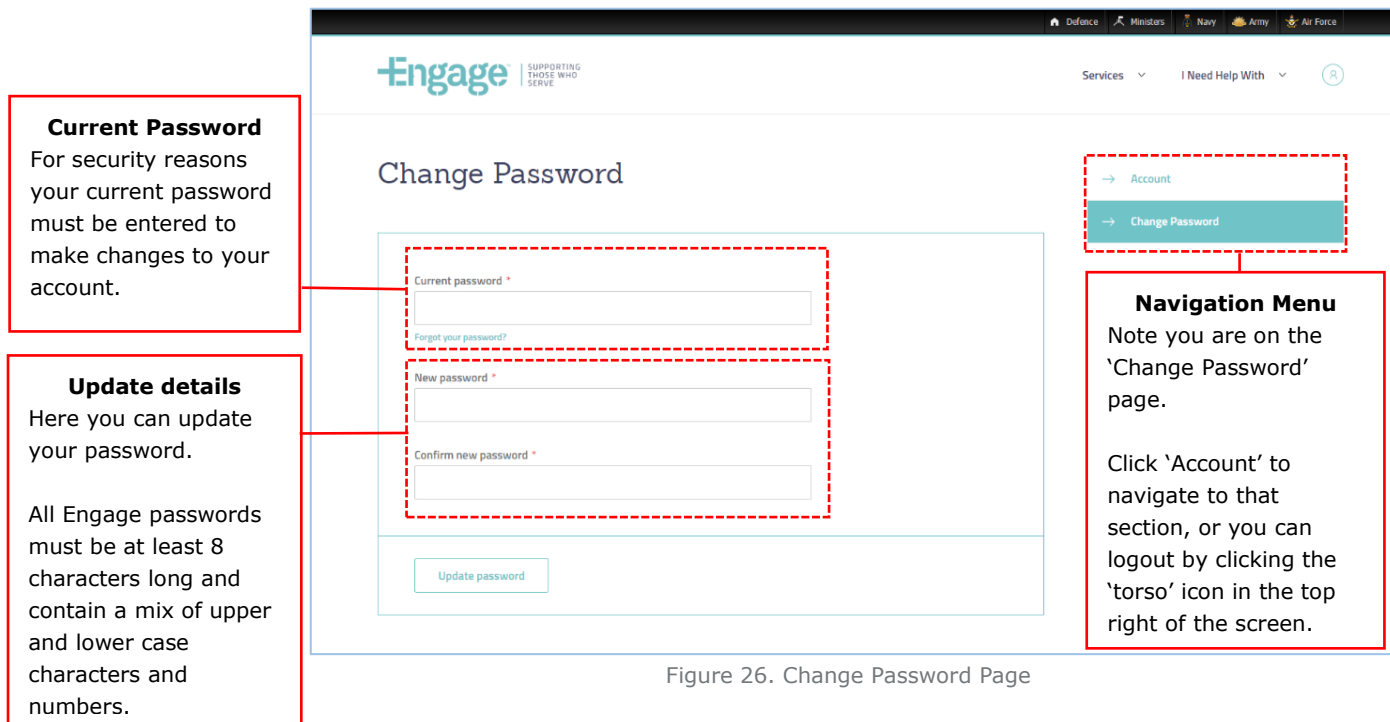All Engage passwords must be at least 8 characters long and contain a mix of upper and lower case characters and numbers.

Figure 26. Change Password Page

Navigation Menu
Note you are on the 'Change Password' page.

Click 'Account' to navigate to that section, or you can logout by clicking the 'torso' icon in the top right of the screen.