

Surfguard

1 — Last update: Jun 24, 2020

Surf Life Saving Australia

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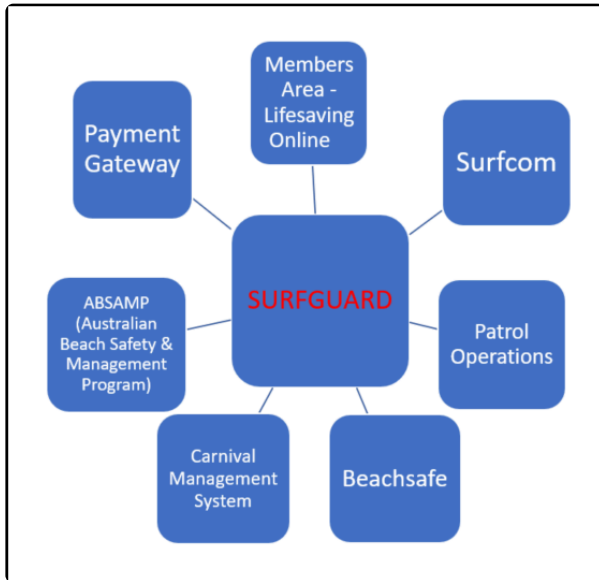
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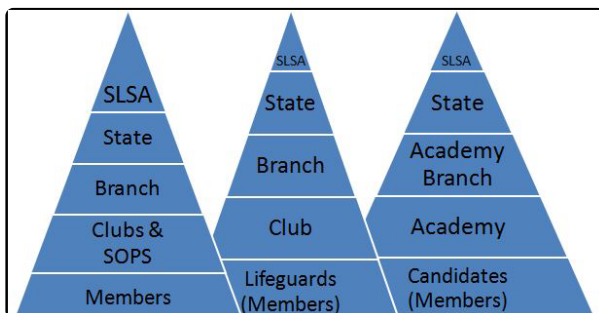
Introduction

Surfguard is a web-based application and is part of a suite of applications that enables Members, Clubs, Branches, State Offices and Surf Life Saving Australia to access the national membership database



Surfguard's relationship to other SLSA websites & online resources

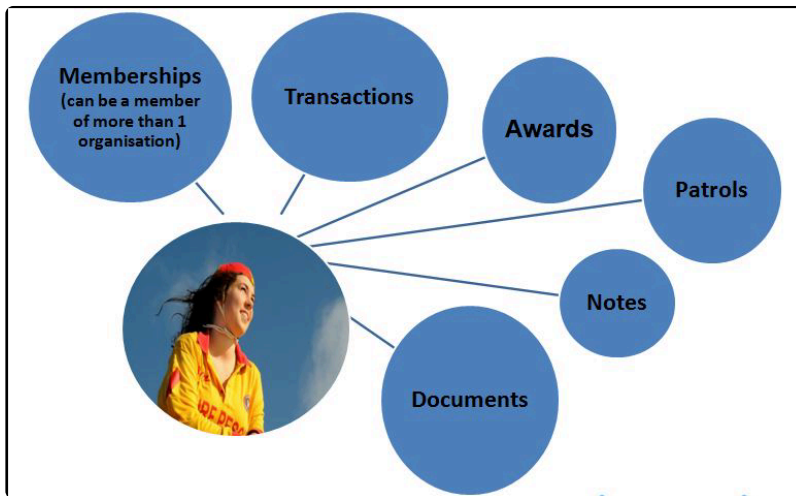
The Surfguard database security is set up on a Child (Club), Parent (Branch) and Grandparent (State) and Great Grandparent (SLSA) pyramid structure. People who have access at a higher level can see the data below them in the structure. Clubs consist of Surf Life Saving Clubs as well as Services such as RWC operations and Lifeguard Services. Where a State has no Branches, all Clubs are entered in the 'Misc Branches' for that State. Those with Club access can only see their own Club data and the membership details of their Club.



Pyramid structure: Clubs & Support Ops, Lifeguards, Academy

A person's record is the centre piece of data in Surfguard around which all records are based. A person is a member of an entity (Club or Clubs) which is connected to a Branch/ State etc. Awards, Patrols and other

details are attached to the member record and used by many parties in the organisation; therefore, it is vital that all member details are kept up to date.



Individuals Details in Surfguard

The Surfguard User Guide is designed as a training resource for those undertaking training in Club, Branch, State or National administration, and a reference tool for those already involved in Club, Branch, State or National administration.

1. User Access

If you don't have a Surfguard User account you will need to complete the IT System User Account Application [Form F049](#),

Access to Surfguard is restricted to Club Officers/ Administrators and Branch/ State/ National staff of related SLSA Organisations and Support Operations. When you apply for a user login you can choose from Full Edit Access, Full Read-Only access or access to specific area/s eg Full Edit for Assessments and rest Read Only. Access to the Incident Reporting Database (IRD), Full or Read Only access, can also be requested. Users should be clear about what access is appropriate. Check with your Club Administrator for more information.

Once the Surfguard Helpdesk at SLSA has processed a Form 049, the system will email the user their log in details.

1.1 Logging In

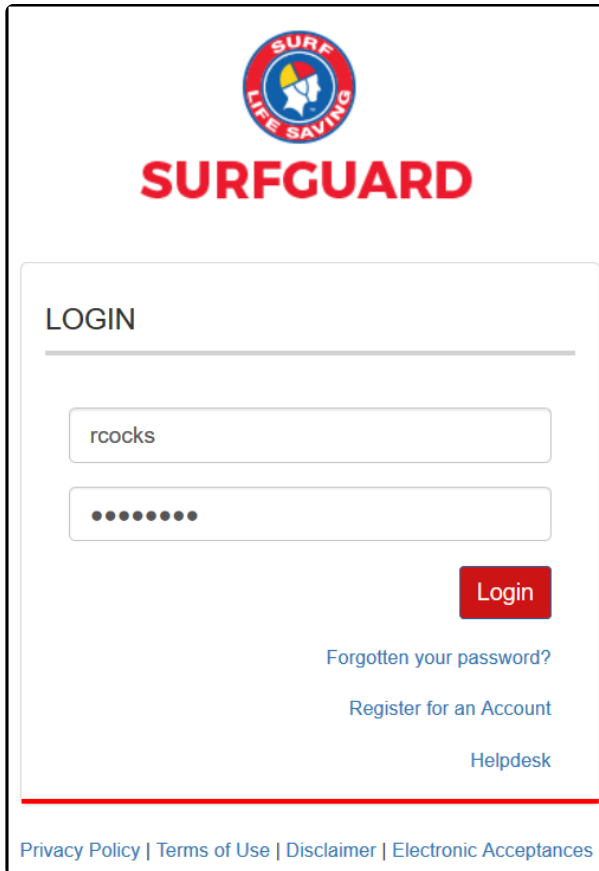
Login instructions

The Surfguard Entry Point is found by browsing to <https://www.surfguard.sls.com.au>.

Once you are at the Surfguard Entry Point screen, you will need to enter your Username and Password.

If a user enters incorrect login details 5 times their account will automatically be marked as 'inactive'.

A completed Form 49 is required to reactivate any Surfguard User Account.

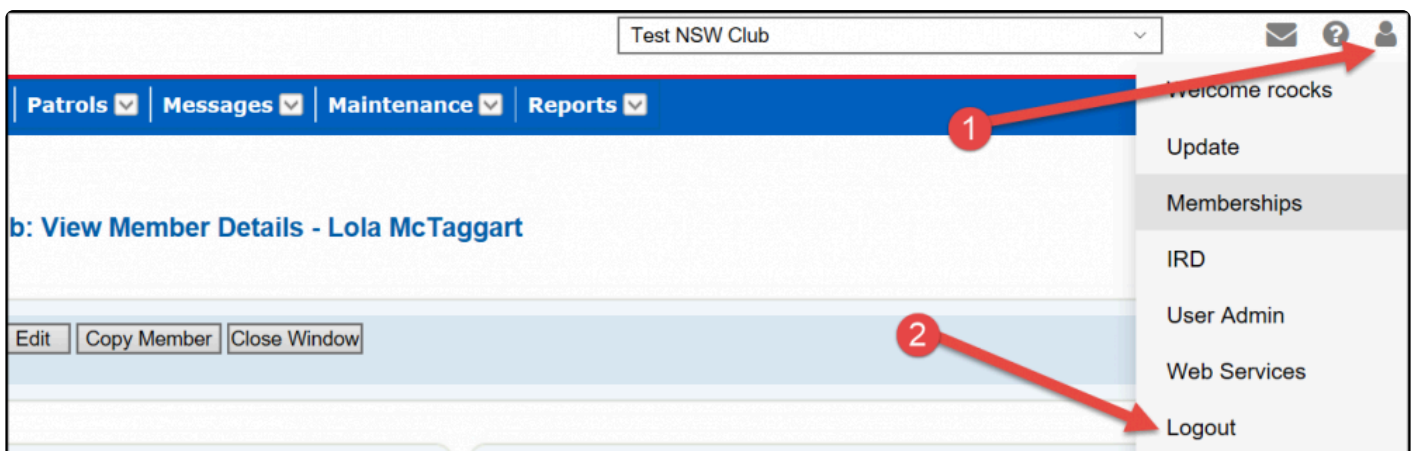


Surfguard Login screen

1.2 Logging Out

Logout Instructions

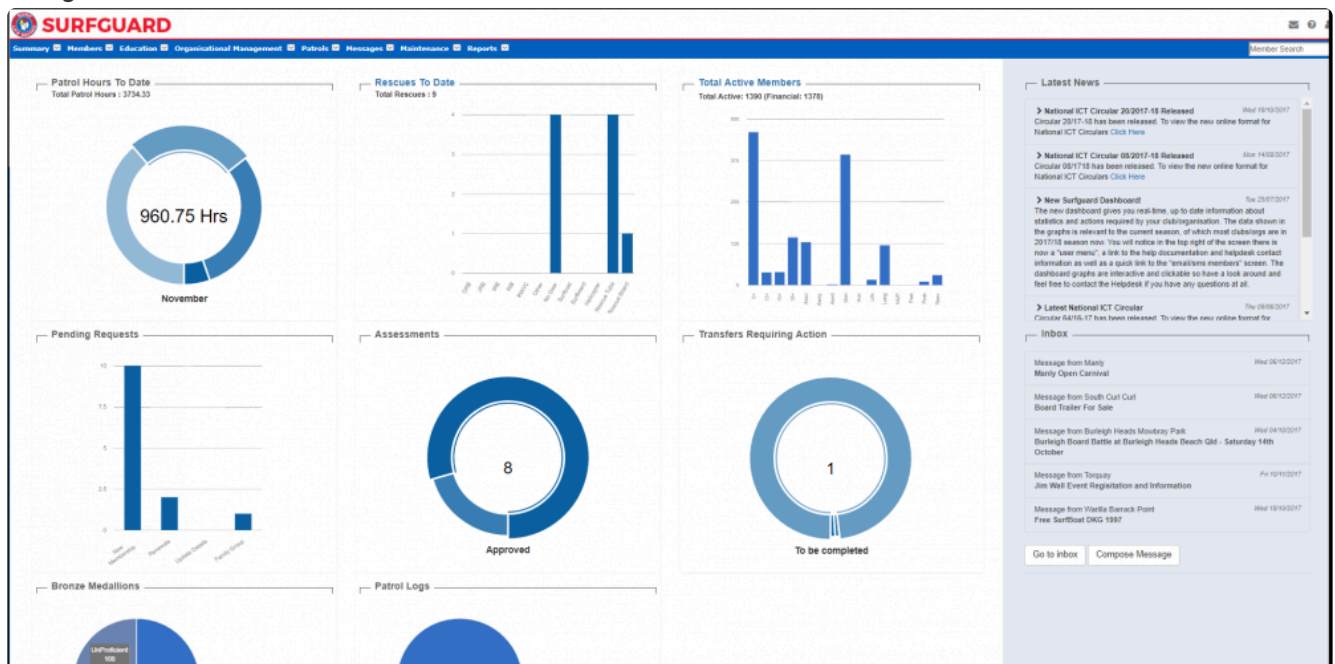
To logout of Surfguard click the person icon on the top right-hand side and click Logout



1.3 Surfguard Dashboard

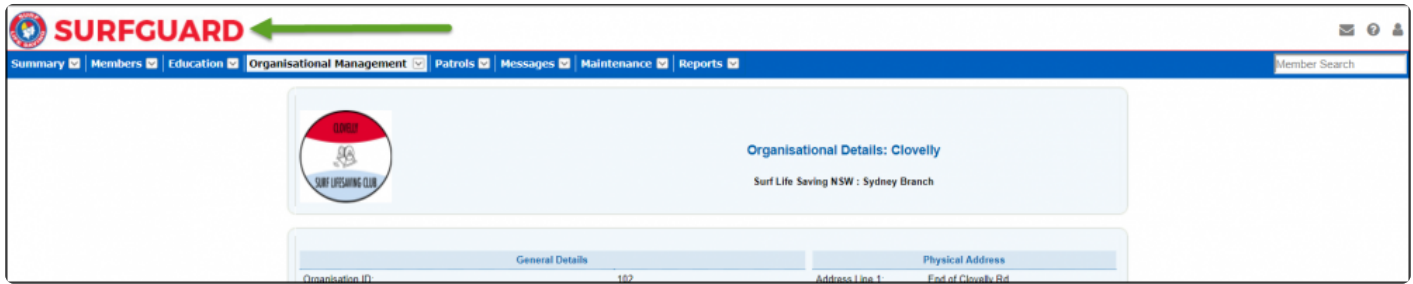
On successful login you will automatically be taken to the interactive Dashboard with links to specific tasks and/or detailed reports, including:-

- Patrol Hours to Date
- Rescues to Date
- Total Active Members
- Pending Requests
- Assessments
- Transfers requiring Action
- Bronze Medallion Status
- Patrol Logs
- Latest News
- Surfguard Intranet



Returning to the Dashboard

The easiest way to return to the Dashboard is to click on the word **Surfguard** at top left next to the SLSA Rondel



1.4 Update Password Every 60 days

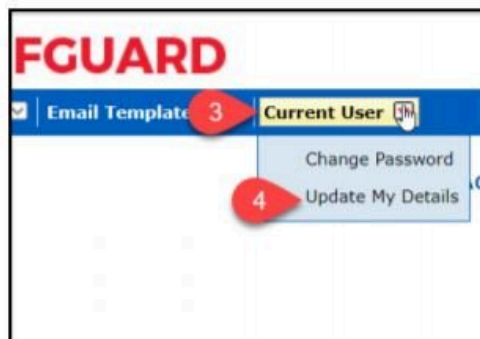
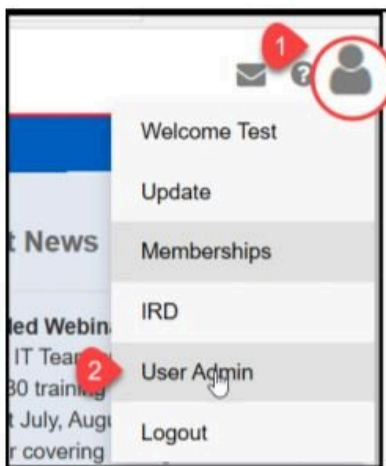
Update Password Every 60 days

Additional security has been added to Surfguard User accounts to ensure that SLSA meets current security standards.

Surfguard Users now have to update their password every 60 days.

Users should keep their account details up to date. Once you have logged into Surfguard, follow these steps.

1. At top right of screen click the **Person** icon
2. Select **User Admin**
3. Click the drop-down for **Current User**
4. Select **Update My Details**
5. Ensure the following highlighted fields (**Mobile Phone & Email**) are updated.
6. Click **Update**



User Name:	rcooks
First Name: *	Rexocca
Surname: *	Coxos
Main Organisation: *	Surf Life Saving Australia
Position:	National IT, Membership and Business
Phone Number: *	029215xx97 (include area code)
Mobile Phone: *	0413xxxx035
Email: *	rcooks@xxx.asn.au
Force Password Change:	[]
Registered for Newsletter:	<input checked="" type="checkbox"/>
Status:	Active
User Account Start Date:	
User Account End Date:	
Send Email:	
Email Template:	Updated Account


1.5 Two Factor Authentication

Two Factor Authentication

1. When logging into SurfGuard for the first time the following screen will prompt you to enter a code to log in. Enter the code you received via Email/SMS.
2. Select the box 'Remember me on this PC for the next 20 days' to remember your device for 20 days.
3. Select 'Resend access code on SMS/Email' if a new access code is required.
4. Select the red Submit Access code button and you will be directed to the homepage of SurfGuard.

Note: For each device you browse SurfGuard on Two-Factor Authentication will be required to access the system.

To update your details for Two-Factor Authentication to work see [Section 1.4](#)


SURFGUARD

Please Enter Access Code

An SMS has been sent to your mobile number ending with 697. Please enter access code in the below field. Please don't refresh the page or don't press the browser back button. It will redirect you to login page.

1

2 Remember me on this PC for next 20 days

3 [Resend access code on SMS/Email](#)

4

2. Summary

Using Summaries

Some routine administration tasks can be viewed via the Summary function. Depending on your level of access to the database, when you login to Surfguard, you will see the 'Summary' menu item at the top left.

The Summary menu contains three sub menu categories. The description of each is below:

Summary Names	Description
Assessment Requests	Optional: include proficiency assessments and breakdown by month. Gives user a summary of how many Assessments have been approved, archived and incomplete
Award: By Current Membership Location	A list of the SLSA Awards with Male and Female total numbers detailing how many of your members attained an award regardless of which club they were at when they obtained the award (can be filtered by season and with a month by month breakdown)
Awards: Originating FROM this Club	A list of the SLSA Awards with Male and Female total numbers detailing how many of your organisations members have attained an award that originated from your organisation. (can be filtered by season and with a month by month breakdown)
Membership Categories	Provides a snap shot of an organisations membership for a specific season detailing membership numbers by membership categories and gender that can be compared to previous seasons
Patrol hours – Organisations	Provides a total number of patrolling hours that your membership has logged against your organisation in a given season
Patrol Hours – Top Members	Provide a report on the Top 10 Female and Male patrolling members who have accumulated the most patrol hours in a specific season. Can be filtered by membership category.
Patrol Stats	A full report of all patrolling stats including # of rescues, beach attendance, first aids performed, patrol weather conditions, preventative actions
Proficiencies	A list of the SLSA Awards with Male and Female total numbers detailing how many of your organisations members have completed a proficiency by season (with breakdown by month optional)
Transfers	This Summary is used to determine the Number of Members who have Transferred in and out of the Club for the desired season.

You can change the summary view by selecting an alternative category from the drop-down 'Display' menu. You can also look at historical data by changing the year in the 'Season' field.

All fields shown in these lists are clickable links that will take you immediately to a listing of all relevant

members.

South Maroubra Summary Details

Display: Sub-Membership Categories ▼ Season: 2019

Output Format: Single HTML Page ▼

Include non-financial members

Retention Comparison Years: 1

Retention details will only be shown if a number greater than zero is entered.

Summary – Dashboard

By selecting the Dashboard you will be redirected to your Surfguard Dashboard (home page)

Summary – Display Statistics

Displays a variety of statistics in a graphical format The user can specify the image refresh rate.

Click 'GO' to commence the Statistic display

2.1 Assessment Request

The Assessment Requests is sorted based on two assessment types: Awards and Proficiencies.

Data can be viewed based on the season, by month by month breakdown or the status of completion, :

Status of Completion includes:

Archived — The Assessment process has been completed and once Archived the Assessment will no longer show in the Assessment Request List.

Complete — Shows in Green and the Assessment can now be Archived.

Incomplete — Shows in Red and there are still additional steps to be done.

To see the detail of Archived, Complete or Incomplete Assessments, click the appropriate word and this will take you to the Assessment Request screen.

South Maroubra Summary Details

Display: Season: Breakdown by Month

Include proficiency assessments

Go

Assessment Requests	
South Maroubra	248
Archived	245
Complete	2
Incomplete	1

From this screen you can perform a number of actions, including modifying, cancelling or submitting the request, depending on your access level.

2.2 Awards (by Current Membership Location)

Awards: by Current Membership Location', provides a list of all new awards and proficiencies held by members of your club.

When viewing the 'Awards: by Current Membership Location' report, by clicking the award type link (e.g. Bronze Medallion) you can view a list of members' names, the date each member gained their award or proficiency and any relevant expiry date. By clicking the 'Awards' link beside each member displayed, you can view a full list of that member's awards and proficiencies.

Depending on your level of access, further sorting options are available when viewing a list of members with the specified award.

2.3 Awards Originating from this Club

Awards: Originating From This Club lists new awards that members have gained from your club specifically.

2.4 Patrol Hours – Organisations

Patrol Hours — Organisations will display the total patrol hours for the given Club or Clubs within a Branch, State.

A Patrol Statistics Summary (Patrol stats) is also available which will output a clubs total patrol statistics for a given season.

By default this report will only show hours for the current organisation, users can select the option to show all hours across all organisations.

By default this report will only show hours for the current organisation, users can select the option to include visitor hours.

South Maroubra Summary Details

Display: Season: Breakdown by Month

This summary will include all patrol hours logged against this organisation in the SLSA hierarchy for the given season. The membership of a person is not taken into consideration during the production of this summary.

Include visitors hours

Total Patrol Hours	
South Maroubra	7,423.88

2.5 Patrol Hours – Top Members

Patrol Hours — Top Members will display the top ten active members based on the total to date of their

patrol hours for a given season.

A number of filtering options are available including season, including non-financial members and organisation hour type.

South Maroubra Summary Details

Display: Patrol Hours - Top Members Season: 2019

Include non-financial members

Sub-Membership Category: All

Leading number of patrolling members: 10

Organisation Hours Type: Lifesaving Hours

Patrol Hours Specifically For Organisation: *(Otherwise, Patrol Hours Cumulative Across All Organisations)*

Total Patrol Hours	
South Maroubra	7,423.88

2.6 Patrol Stats

A Clubs Patrol Stats can be displayed with the option to display Patrolled and/or Unpatrolled Stats. Select the 'Stats Type', the season and click GO.

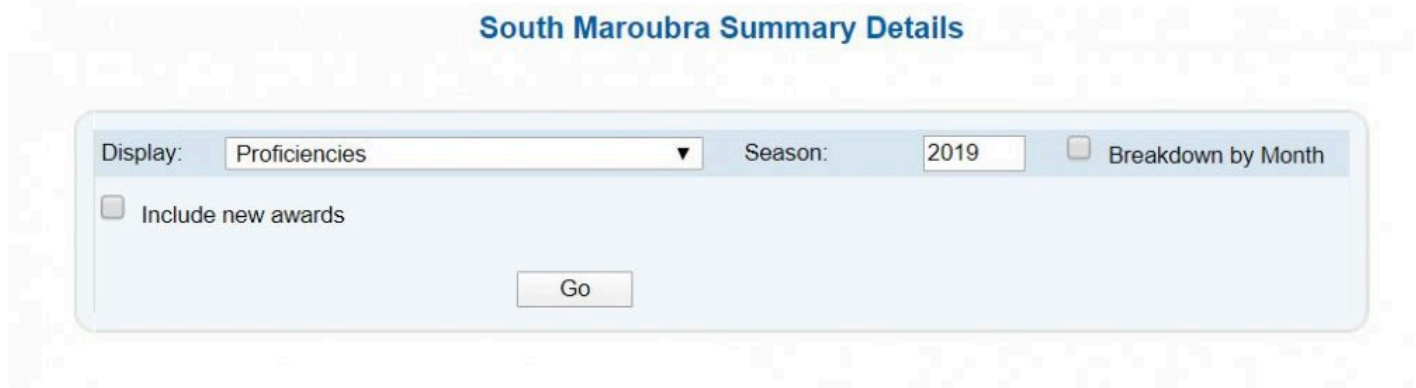
South Maroubra Summary Details

Display: Patrol Stats Season: 2019

Stats Type:
 All
 All
 Patrolled Stats
 Unpatrolled Stats

2.7 Proficiencies

The Proficiencies Summary screen shows the proficiencies gained during a given season. In addition to only re-qualifications, you may also select the check-box to display proficiency awards gained for the first time.



The screenshot shows a web form titled "South Maroubra Summary Details". The form has a light blue background and contains the following elements:

- A "Display:" label followed by a dropdown menu set to "Proficiencies".
- A "Season:" label followed by a text input field containing "2019".
- A checkbox labeled "Breakdown by Month" which is currently unchecked.
- A checkbox labeled "Include new awards" which is currently unchecked.
- A "Go" button centered at the bottom of the form.

2.8 Sub Membership Categories

The Sub-Membership Categories Summary is a list of all the club's members sorted based on their sub-membership category.

Sub-Membership categories follow the SLSA Regulations and Policies, which can be found in the Member's Portal.

The following Sub-Membership Categories are used:

- Probationary
- Junior Activity Member (5-13 years)
- Cadet Member (13-15 years)
- Active (15-18 yrs)
- Active (18 yrs and over)
- Award Member
- Reserve Active
- Long Service
- Past Active
- Associate
- Life Member
- General

- Honorary
- Non Member Participant
- Leave/Restricted

Filtering option include:

Output format

Include non-financial members

Season

Retention comparison years

South Maroubra Summary Details

Display:	<input type="text" value="Sub-Membership Categories"/>	Season:	<input type="text" value="2019"/>
Output Format:	<input type="text" value="Single HTML Page"/>		
<input type="checkbox"/>	Include non-financial members		
Retention Comparison Years:	<input type="text" value="2"/>		
Retention details will only be shown if a number greater than zero is entered.			
<input type="button" value="Go"/>			

Display: Season:

Output Format:

Include non-financial members

Retention Comparison Years:

Retention details will only be shown if a number greater than zero is entered.

Sub-Membership Categories							
The figures in this summary are those at 1st July of the selected season (or earlier if elected in the screen 'Registration Season End Settings').							
Sub-Membership Category	Total Members	Male Members	Female Members	Indeterminate Gender	Unknown Gender	2018 Season Total Members	Member Retention (%)
Probationary	4	3	1	0	0	1	400 %
Junior Activity Member (5-13 years)	864	451	413	0	0	817	105.75 %
Cadet Member (13-15 years)	51	24	27	0	0	41	124.39 %
Active (15-18 yrs)	38	16	22	0	0	44	86.36 %
Active (18yrs and over)	174	110	64	0	0	181	96.13 %
Award Member	1	1	0	0	0	1	100 %
Reserve Active	12	8	4	0	0	15	80 %
Long Service	35	33	2	0	0	29	120.69 %
Associate	32	27	5	0	0	30	106.67 %
Life Member	22	20	2	0	0	22	100 %
General	246	127	119	0	0	254	96.85 %
Honorary	7	7	0	0	0	7	100 %
Total	1486	827	659	0	0	1442	103.05 %

2.9 Transfers

The Transfer Summary screen shows the numbers of members transferring in or out of your club, branch or state during the specified season.

You can use the Transfers area within Surfguard – Members – Transfers for organising member transfers easily between your club and other clubs.

South Maroubra Summary Details

Display: Transfers Season: 2019 Breakdown by Month

Transfers					
	Total Members	Male Members	Female Members	Indeterminate Gender	Unknown Gender
Total	172	91	81	0	0
Incoming	99	45	54	0	0
Outgoing	73	46	27	0	0

3. Members

The 'Members' tab allows you to access member information and process membership changes. The Members tab has the following sub-tabs



Members Tab & Sub-Tabs

3.1 Find Member

To find a member select the 'Find Member' sub-tab and enter the member's details such as first name, surname, email, phone and/ or Member ID number, and click the 'Submit' button. Data can be further sorted using the options listed on the screen. The options allow you to include active, archived, suspended and/or deceased records, as well as enabling you to search on part of a name or return only members with Awards, Patrol hours, etc. Making the search as specific as possible will speed it up.

For National, State and Branch users, mandatory input of at least 2 characters of the first name/ surname or 5 digits of the member ID is required when searching for active or archived members.

Search For a Member

Member ID:

First Name:

Last Name:

Date of Birth - From: To: (dd/mm/yyyy)

Home Phone: Mobile:

Email:

Competitor:

- Include active records

- Include archived records

- Include suspended records

- Include deceased records

- Include expelled records

- Only members with awards

- Only members with patrol data

- Only members with pending member requests

- Only members with notes

- Only members with documents

- Check this to search on part of name

Records Per Page:

You can then view a range of member details from the resulting list. You can view the full details for a member by clicking the relevant link. For example, click the 'View' link in the user options section to access an individual member's details

Members @ Test NSW Club

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Membership Category	Competitor	Contact Number	User Options
<input checked="" type="checkbox"/>	4738420	McBean	Tin Tin	28/09/1981	Test NSW Club	2012 - 2013	Active	Active (18yrs and over)	Yes	0429965321	View Edit Awards Transaction Patrols Notes Documents

Criteria: Surname begins with mcbean; Competitor = All; Status = Active,Archived.

Page: 1
Total Records: 1

Actions:

3.1.1 Duplicate Member Records

When you come across a Member with duplicate Membership files, to initiate a Surfguard 'merge' of their duplicate files ensure the following information is identical in both Membership ID's

- First Name
- Last Name
- Gender
- Date of Birth (You must contact State office to request a change of DOB)

Once the information in Surfguard for both Member ID's is identical, Archive the Member ID you don't want and leave the preferred ID as Active.

A script in the system will run overnight and look for any duplicate accounts with the same first name, last name and DOB and merge the accounts.

If the duplicate member records do not merge overnight please browse to <https://help.sls.com.au> and log a Support Ticket

3.1.2 Find Member – View

The 'View' option allows users to open up a members profile and view all information attached to the members profile

Members @ South Maroubra

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	South Maroubra	2019 - 2020	Active	Life Member	Yes	0432159669	View Edit Awards Transaction Patrols Notes Documents

Criteria: First Name begins with yvette; Surname begins with rutherford; Competitor = All; Status = Active,Archived.

Page: 1
Total Records: 1

Actions:

3.1.3 Find Member – Edit

The 'Edit' option allows users to open up a members profile and edit fields as necessary

Members @ South Maroubra

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	South Maroubra	2019 - 2020	Active	Life Member	Yes	0432159669	View Edit Awards Transaction Patrols Notes Documents

Criteria: First Name begins with yvette; Surname begins with rutherford; Competitor = All; Status = Active,Archived.

Page: 1
Total Records: 1

Actions:

3.1.4 Find Member – Awards

A members list of awards can be viewed by accessing the user option 'Awards'.

Members @ South Maroubra

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	South Maroubra	2019 - 2020	Active	Life Member	Yes	0432159669	View Edit Awards Transaction Patrols Notes Documents

Criteria: First Name begins with yvette; Surname begins with rutherford; Competitor = All; Status = Active,Archived.

Page: 1
Total Records: 1

Actions:

At the bottom of the awards screen, users can 'print record of results'

3.1.5 Find Member – Transactions

Click **Transactions** to view transactions made by the member via the Members Area and also transactions added manually by the club.

Members @ South Maroubra

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	South Maroubra	2019 - 2020	Active	Life Member	Yes	0432159669	View Edit Awards Transaction Patrols Notes Documents

Criteria: First Name begins with yvette; Surname begins with rutherford; Competitor = All; Status = Active,Archived.

Page: 1
Total Records: 1

Actions:

1. Use the date fields 'from – to' to list transactions from previous seasons
2. All Transactions will be listed and these can be viewed, edited or deleted

Transaction Details for Yvette Rutherford

From Date: To Date:

Transaction Date: *
Transaction Type:
Payment Method:
Amount:
Paid:
Outstanding:
Receipt No.:
Description:

Date	Type	Amount	Outstanding	ReceiptNo	Actions
28/02/2020	Other	1.00	0.00	2645869021	View Edit Delete
27/02/2020	Function	400.00	0.00	2644357800	View Edit Delete
05/02/2020	Function	70.00	0.00	2627151669	View Edit Delete
02/08/2019	Other	1.00	0.00	2489274167	View Edit Delete

3. Add a Transaction manually by completing the fields and clicking 'save'.

Transaction Date: *
Transaction Type:
Payment Method:
Amount:
Paid:
Outstanding:
Receipt No.:
Description:

A transaction report can be obtained by clicking Reports – General Reports – Member Reports and then selecting Transactions from the report type drop down box. Select the output format and select a date range or customise your report by clicking on the ‘advanced search’ button

3.1.6 Find Member – Patrols

Click to view members Patrol Roster, detailed Patrol Hours including season competition hours.

[Members @ South Maroubra](#)

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	South Maroubra	2019 - 2020	Active	Life Member	Yes	0432159669	View Edit Awards Transaction Patrols Notes Documents

Criteria: First Name begins with yvette; Sumame begins with rutherford; Competitor = All; Status = Active,Archived.

Page: 1
Total Records: 1

Actions:

3.1.7 Find Member – Notes

Click on **Notes** to view any notes created about the member.

[Members @ South Maroubra](#)

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	South Maroubra	2019 - 2020	Active	Life Member	Yes	0432159669	View Edit Awards Transaction Patrols Notes Documents

Criteria: First Name begins with yvette; Surname begins with rutherford; Competitor = All; Status = Active,Archived.

Page: 1
Total Records: 1

Actions:

Notes are date stamped. Members notes will be viewable by all organisations that a member belongs to however each note can only be edited by the creating entity. Notes can also be accessed from within a member record from the Members Link section.

1. Use the date filter ‘from and to’ fields to view all members notes

Notes for Yvette Rutherford @ South Maroubra

1

Note Dates From: To:

Note Type: Only Display Current Organisation Notes:

3

Note Date	Organisation	Note Type	Heading	Options
01/06/2019	South Maroubra	Recognition	Clubman of the Year	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

Total: 1 Note(s).

2. All notes attached to the members file will be displayed

3. From this screen you can create a new Notes. Click 'create note' and fill in the Date, Type, Heading and Details sections.

Notes for Yvette Rutherford @ Surf Life Saving Australia

Organisation: Surf Life Saving Australia

Note Date:

Note Type:

Heading:

Details:

3.1.8 Find Member – Documents

Surfguard allows users to upload Documents against a members file.

Members @ South Maroubra

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All											
<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Sub-Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/>	3660048	Rutherford	Yvette	06/05/1966	South Maroubra	2019 - 2020	Active	Life Member	Yes	0432159669	View Edit Awards Transaction Patrols Notes Documents

Criteria: First Name begins with yvette; Surname begins with rutherford; Competitor = All; Status = Active, Archived.

Page: 1
Total Records: 1

Actions:

Click the Documents link in the user options (see above image) to view any documents attached to the member (e.g., Members ID, Blue Card, Birth Certificate, Drivers Licence, Marine Licence, RPL Documents).

1. Click on View, Update or Delete to manage uploaded documents.

Documents for Yvette Rutherford @ South Maroubra

Document Name From: To:

Document Type: Document Description:

Document Name	Description	Type	Size	Options
Drivers Licence	Drivers Licence	PDF	37 Kb	<input type="button" value="View"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>
Honour Blazer Nomination	Honour Blazer Nomination (4pg)	PDF	148 Kb	<input type="button" value="View"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>
Life Membership Speech for YR by Nominator LP	Yvette Rutherford	DOC	33 Kb	<input type="button" value="View"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>
Member Protection Declaration	Member Protection Declaration	PDF	337 Kb	<input type="button" value="View"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>
Member Protection Officer Certificate	Member Protection Officer Certificate 2017	PDF	86 Kb	<input type="button" value="View"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>
P1 Old member card	Page 1 Member card	PDF	71 Kb	<input type="button" value="View"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>
P2 Old Member card	Page 2 Member card	PDF	55 Kb	<input type="button" value="View"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>
P3 Old member card	Page 3 Member card	PDF	38 Kb	<input type="button" value="View"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>
WWCC	WWCC	PDF	514 Kb	<input type="button" value="View"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>

Total: 9 Documents(s).

2. From this screen you can also attach a new Document. Document size is a maximum of 2Mb

Click on 'Attach New Document', type in the document name and description and upload image.
Click 'Save'

Documents for Yvette Rutherford @ South Maroubra

Attach New Document

Document Name: *

Document Description: *

Upload Document: * No file chosen

Please Note:

Acceptable Document Types: DOC
DOCX
GIF image
JPEG image (jpeg)
JPEG image (pjpeg)
PDF
PNG image
TXT

Maximum File Size: 2M

3.2 Add Member

To add a member click the 'Add Member' sub-menu. You can then add an individual's details using the drop-down option lists on this screen.

A red asterisk (*) indicates a field that must be completed for the record to be successfully submitted to the Surfguard database.

Mandatory fields include First Name, Last Name, Gender and Date of Birth, Home & Postal Address fields and Date Joined. These criteria help identify individual sets of data within Surfguard. By clicking the 'Check for Duplicate' button under Date of Birth, you can search the database for similar entries using the four mandatory fields (First and Last Name, Gender and DOB). For example, if two family members with the same name join the same Club, they will be differentiated by their respective dates of birth.

 [Top Tips for Add Member](#)

- **Occupation Field** – A member’s occupation will automatically default to “Student” if the member is aged up to 16 years old.
- **Preferred Name/ Family name** – use if a member wishes to go by nickname or maiden/ married name.
- **Post nominal** – This is a list of letters displaying after a members name that have been nominated by orders from the government and letters from Professional associations in Australia. eg AO, OAM, QC, JP
- **Returned Mail flag** – A checkbox for each address type (Home, Postal and Emergency Contact) displays. This allows club administrators to flag the address if it is incorrect and mail has been returned to sender. The flag has been added to a number of member details reports giving access to reporting on all members with incorrect addresses.
- ***Email Address *** - 2 email addresses can be added, however, email communication sent via Surfguard only sends to Email Address 1.
- **Do not Send SMS/Email** – It is a legal requirement of the Privacy Act that Clubs action requests by members who do not want any information sent to them via Email or SMS. These must be checked for a member who requests either or both options. Once any or all of the boxes are ticked the member will no longer receive any communication from any level of the organisation.
- **Member Protection Fields and Police Check** – please check with your State centre how to complete these fields as each State has different requirements based on the state legislation requirements.
- **Member injured/ Light Duties information** – a person will not be able to have patrol hours entered against their name if the Injured/ Light Duties box has been ticked in the member details area. This is to prevent a person from patrolling if they are under a Workcover/return to work activity.
- **Members Portal Account Details** – will be blank if a member has not created a Member Area account. If there is an account created the details displayed include Username, Created Date & Last Login Date.

3.3 List Members

The list members view contains a list of all members in your organisation with an Active Status. From this screen you can view or edit each individual member’s record. It should be noted that, where the Club List runs onto a second page, you can access the next screen by clicking the ‘Next >>’ link. This list can be alphabetically sorted using the letters above the list or by clicking the column header to sort by a specific column. When an individual member record is selected, you can access the member’s awards, patrols and transactions data by clicking the member links.

When editing a member; mandatory fields are marked with a red asterisk. When archiving a member (or setting their status to deceased or suspended), you may specify to remove them from patrol teams, mailing groups and/ or internal memberships. A number of options will be displayed when the archive, suspended or

deceased statuses are selected.

When you are viewing a list of members, you can SMS or email the member/s direct from this screen. To SMS or email member/s from their member record, tick the relevant boxes besides the Member ID, then click either/ or both, SMS Selected Members or Email Selected Members.

Members @ Test NSW Club

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Membership Category	Competitor	Contact Number	User Options		
<input type="checkbox"/>	5738880	Account	Test	05/02/1969	Test NSW Club 2017 - 2018	2017 - 2018	Active	General	No	0406353383	View Edit	Transaction Patrols	Notes Documents
<input type="checkbox"/>	5734454	Ahsan	Feedaa	25/09/2011	Test NSW Club 2017 - 2018	2017 - 2018	Active	Junior Activity Member (5-13 years)	Yes		View Edit	Transaction	Notes Documents
<input type="checkbox"/>	5734085	Ahsan	Kazi	15/01/1982	Test NSW Club 2017 - 2018	2017 - 2018	Active	Active (18yrs and over)	Yes		View Edit	Transaction	Notes Documents
<input type="checkbox"/>	5639220	allens	stevie	01/06/2001	Test NSW Club 2017 - 2018	2017 - 2018	Active	Active (15-18 yrs)	Yes	12345678	View Edit	Transaction Patrols	Notes Documents
<input type="checkbox"/>	5473094	Andrews	r	19/11/1966	Test NSW Club 2015 - 2016	2015 - 2016	Active	Active (16yrs and over)	Yes		View Edit	Transaction Patrols	Notes Documents
<input type="checkbox"/>	5783297	Bakhsh	Roy	12/12/1982	Test NSW Club 2017 - 2018	2017 - 2018	Active	Active (18yrs and over)	Yes	0416812176	View Edit	Transaction Patrols	Notes Documents
<input type="checkbox"/>	5545386	Baum	Adam	06/06/2004	Test NSW Club 2017 - 2018	2017 - 2018	Active	Junior Activity Member (5-13 years)	Yes		View Edit Awards	Transaction Patrols	Notes Documents
<input type="checkbox"/>	5740174	bec	test	05/10/1965	Test NSW Club 2017 - 2018	2017 - 2018	Active	Probationary	Yes	0413457035	View Edit Awards	Transaction	Notes Documents
<input type="checkbox"/>	5740561	bloggs	jo	05/05/2005	Test NSW Club 2017 - 2018	2017 - 2018	Active	Junior Activity Member (5-13 years)	Yes		View Edit	Transaction	Notes Documents
<input type="checkbox"/>	5628610	blue	Purple	01/01/1999	Test NSW Club 2017 - 2018	2017 - 2018	Active	Active (15-18 yrs)	Yes	0421875547	View Edit Awards	Transaction Patrols	Notes Documents
<input type="checkbox"/>	5729856	Bobby	Billy	03/11/1988	Test NSW Club 2016 - 2017	2016 - 2017	Active	Active (18yrs and over)	Yes	0400975283	View Edit	Transaction	Notes Documents

Criteria: Status = Active.

Page: 1 2 3 4 5 6 7 8 9 10 11 Next >>
Total Records: 202

Actions:

List Members Screen

3.4 Family Groups

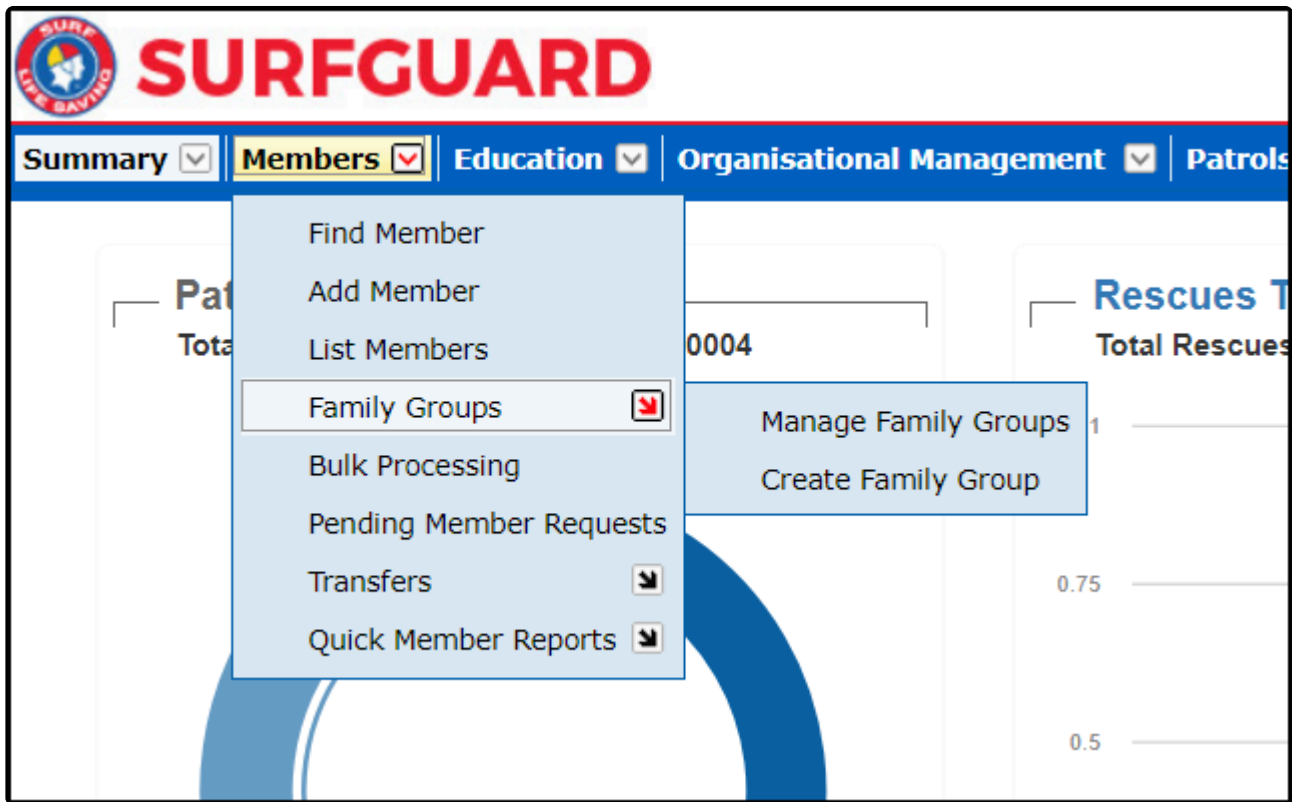
Key Information

- A Family Group is simply an artificial grouping of people in one club for the purposes of data management where it is assumed the primary member(s) in control of the group have some sort of legal standing to manage the Family Group.
- Family Groups consist of Primary member(s) who can manage the group and standard members who can be managed in the group.
- A Family Group can only exist where there is at least one Primary and one Standard member.
- A Primary member must be over 18 years old.
- Notifications will be sent when a person is demoted or removed from a group.
- You can be a member of more than one family group in one club and/or a member of a family group in more than one club.

3.4.1 Creating a Family Group

Surfguard administrators can create a Family Group by selecting Members > Family Groups > Create Family Group.

People can be added as a PRIMARY or a Standard member of the Family Group.



The following screen will display. The Primary Contact must be added First, these are the members who can manage the other members in the family group (over the age of 18 yrs)

Note: You may need to tick the box Include Non-Financial Members.

Create a Family Group @ Test NSW Club

Family Group Details

Family Group Name: *

Select Primary Contact

Include Non Financial Members

Filter Available Members Further: (recommended for organisations with a large amount of members)

Member ID:

First Name:

Last Name:

Date of Birth: (dd/mm/yyyy)

Sub-Membership Categories:

- Probationary
- Junior Activity Member (5-13 years)
- Cadet Member (13-15 years)
- Active (15-18 yrs)
- Active (18yrs and over)
- Award Member
- Reserve Active
- Long Service
- Past Active

Available Members:

Testerman, Joshua (DOB: 29/03/1998, Reg Season: 2018, Life Member) - Active

Selected Members: *

Testerfield, Joshua (DOB: 29/03/1998, Reg Season: 2018, Probationary) - Active

Once you have found all members from the Available Members section and moved them across to Selected Members, scroll down and click **Create Family Group**

The Primary member will receive an email once the group has been approved in SurfGuard.

3.4.2 Deleting a Family Group

Surfguard administrators can delete a family Group by selecting Members > Family Groups > Manage Family Groups

To delete a family group, select the 'Delete' option next to the desired group. **NOTE:** an email will be sent to the Primary Member when a Family Group is deleted.

Family Groups @ Test NSW Club

Family Group name - From: To:

Family Group Contaning Surnames - From: To:

Family Group Name	Number of Members	Primary Contact	Actions
georgetest	3	peter tester	Edit View Delete Renew Memberships
GPT FG 7065	2	Rebecca Cocks	Edit View Delete Renew Memberships
Sems Family	4	Margaret Sems	Edit View Delete Renew Memberships

3.4.3 Editing Family Groups

Surfguard administrators can manage a family Group by selecting the following Members > Family Groups > Manage Family Groups.

Note: If you have a large number of family groups, you can simply use the Search facility to find and edit a family group.

Family Groups @ Test NSW Club

Family Group name - From: To:

Family Group Contaning Surnames - From: To:

Family Group Name	Number of Members	Primary Contact	Actions
McTaggart	3	Rebecca McTaggart	Edit View Delete Renew Memberships

Editing A Family Group

1. To update the name of the Family Group type in the update name details in the 'Family Group Name' field.
2. To remove a member from the family group, click **Remove**.
3. To update a member's individual member profile click **Edit**
4. To add another family member to the group select either **Add new member as primary contact** or **Add new member as a standard member**

Edit Family Group @ Test NSW Club

Family Group Details

Family Group Name: *

Organization: Test NSW Club

Primary Contact Details

Member ID	Member Name	DOB	Contact Number	Email	Registered Season	Status	Sub-Membership Category	Action
5464537	Rebecca McTaggart	05/10/1966	0413444555	test@mctaggart.com	2019	Active	Active (18yrs and over)	Edit

Standard Member Details

Member ID	Member Name	DOB	Contact Number	Email	Registered Season	Status	Sub-Membership Category	Action
5845999	Donald McTaggart	18/02/1961	0413444555	test@mctaggart.com	2019	Active	Active (18yrs and over)	Edit Remove Promote as Primary Contact
5740416	Lola McTaggart	10/10/2010	0413444555	test@mctaggart.com	2018	Active	Probationary	Edit Remove

Renewing a Family Group

Options are available next to each family group to 'Renew Memberships'. By selecting this link it will take you to the bulk processing screen and provide the ability to renew the membership for all members of that family. **NOTE:** This action should only be done once you are using paper renewal forms and they have been signed and payment has been made.

3.5 Bulk Processing

You can easily process a number of club members at once by using the 'Bulk Processing' sub-menu. You can use the Bulk Processing function to:-

- Activate Members
- Archive Members

- Clothing Sizes
- Create Member Notes
- Dissolution of Family Groups
- Internal Memberships
- Member Protection
- Register Members for Current or Next Season
- Transactions
- Update Member Declarations
- Update Member Details
- Update Member Source Companies
- Update Sub-Membership Categories

Depending on the Process Type selected from the drop-down you may be prompted to remove the member from Patrol Teams and Internal Membership groups.

Highlight members by clicking their name in the Available Members list and clicking the > to move to Selected Members. The quickest way to add names to the Selected Members list is by holding the Control key down and clicking multiple members name in the “Available Members” list and then click > to move them to Selected Members.

You will be prompted before being allowed to process any member records. Click ‘OK’ to continue or ‘Cancel’ if you want to review or change your selection.

You can clear all the fields selected and start again by clicking the ‘Reset’ button at the bottom of the screen.

Bulk Processing for Test NSW Club

Process Type: Archive Members ▼

Filter Available Members further: (recruitment of members)

Member ID:

First Name:

Last Name:

Also remove Members from:

- Internal Memberships
- Mailing Groups
- Patrol Teams
By removing this members from patrol team you will also remove any patrol substitution requests linked to this members in their specific team.

Available Members:	Selected Members: *
Account, Test (5738880) 05/02/1969 - 2017/2018 Ahsan, Feedaa (5734454) 25/09/2011 - 2017/2018 Ahsan, Kazi (5734085) 15/01/1982 - 2017/2018 allens, stevie (5639220) 01/06/2001 - 2017/2018	

3.6 Pending Member Requests

Any pending request submitted by a member via their Members Area account must be approved by the club before the members details in Surfguard will be updated. Members can submit a number of pending requests via their Members Area account, including:-

- Dissolve Family Group
- Leave Family Group
- New Club Membership
- New Family Group
- New Family Group Member
- Renew Club Membership
- Update Personal Details

Approving or Requesting from the Pending Request landing page

1. Tick the check box in the Select column beside each request you wish to process.
2. If a tick box in the select column cannot be ticked it means the request cannot be actioned until another process is completed.
3. A ? displays next to the Request Type. Hover over the ? with your mouse to display a pop-up that will

provide an explanation for why you cannot action the request

4. Select from either “Accept”, “Reject” or “Archive” request(s)

Pending Member Requests View @ Test NSW Club

Request Status: Accepted
Archived
Pending
Rejected

Request Dates From: **To:** (dd/mm/yyyy)

Member First Name:

Request ID:

Member ID:

Member Last Name - From: **To:**

Request Type: Change Membership Category
Dissolve Family Group
Leave Family Group
New Club Membership
New Family Group
New Family Group Member
Renew Club Membership
Update Personal Details

Select	Request ID	Request Date	Member ID	Member Name	Membership Category	Season	Status	Links
<input type="checkbox"/>	504744	19/10/2017 18:19:55	5773703	Ryan, Patrick	Probationary	2017/2018	Pending	View Transactions
<input checked="" type="checkbox"/>	504746	19/10/2017 18:26:41	5773703	Ryan, Patrick	New Family Group [2]	2017/2018	Pending	View Transactions
<input type="checkbox"/>	504747	19/10/2017 18:26:45	5773704	Ryan, Lola	Probationary	2017/2018	Pending	View Transactions
<input type="checkbox"/>	512817	31/10/2017 10:33:38	4655552	Klerck, Travis	Active (18yrs and over)	2017/2018	Pending	View Transactions

3.7 Transfers

The three types of transfers that can be processed are:

Complete: Used when the member is doing a complete transfer from one club to another club.

Non-competition Rights: used when transferring a member to another club, but keeping their competition rights with their original club. This will give the member Dual Membership at one or more clubs.

Competition Rights: used when moving a member's competition rights to another club, but still retaining their membership at their original club as a non-competitor. This will give the member Dual Membership at one or more clubs.

When initiating a transfer you can either transfer a member out of your club and into another club (Transfer Out) or choose a member from another club to transfer into your club (Transfer In).

An example of a transfer can be seen below:

Membership Transfer Request @ Test NSW Club

Transfer Into Organisation

Losing Club

State:

Branch:

Club:

Enter either member ID or full name

Member ID:

First Name:

Last Name:

The process involves selecting the club that the member is coming from and then entering their details like a name or member ID if known. Assuming the member is found, a new screen will display asking for information relating to the transfer. Once submitted, the transfer will then be available in your “Transfer In” area of the main transfer Summary page.

The “Transfer Out” process is almost identical, but you are selecting a member from your club instead of another club.

Once a transfer has been created, the person’s contact phone number and email address will be displayed to allow the winning club to contact the member before the completion of the transfer.

Members can initiate a transfer via their Members Area account, this will appear as a pending member request in Surfguard (needs to be processed under the Transfers Tab in the first instance).

To view a list of membership transfers, select the relevant options from the drop-down menu in the search fields on the Transfer Summary page.

By clicking the 'Incoming' or 'Outgoing' links you can view a full list of the relevant members.

Membership Transfers Request List @ Test NSW Club

[\[Help \]](#)

[New Transfer In](#)
[New Transfer Out](#)

Type: <input type="text" value="All"/>	Status: <input type="text" value="All"/>
Winning Club: <input type="text" value="All"/>	Losing Club: <input type="text" value="All"/>
Direction: <input type="text" value="Transfer In/Out"/>	Member Name: <input type="text" value="All"/>
Sort By: <input type="text" value="Most Recent"/>	<input type="button" value="Reset Filters"/> <input type="button" value="Go"/>

Transfer Out										
ID	Member ID	Name	Winning Club	Losing Club	Transfer Type	Create Date	Most Recent Action Date	Age	Status	Action
11880	4443605	bob hoskins	Test Vic Club	Test NSW Club	Full Transfer	18/09/2008	18/09/2008	0 days	New	Endorse Not Endorse Update Delete
Total: 1										

[New Transfer In](#)
[New Transfer Out](#)

From this screen, you can perform a number of actions, including approving or rejecting each transfer request if your access allows. As an example, after you click the 'Endorse' or 'Not Endorse' links you are taken to a screen that displays the individual's details and allows you to action the transfer request by clicking 'Submit'.

You can also view the contact details for the winning or losing club and their respective branch and state by clicking the club name. The summary information can also be sorted using filters contained in the drop-down options.

You can obtain further transfer information about a transfer by clicking the Transfer ID number. This will

open a summary page about that member's transfer.

Transfer Details			
Transfer ID:	98057		
Transfer Type:	Non-competition rights		
Transfer Status:	Completed		
Winning Club			
Winning State:	Surf Life Saving NSW		
Winning Branch:	Test NSW Branch		
Winning Organisation:	TestNSW 2 Club		
Losing Club			
Losing State:	Surf Life Saving NSW		
Losing Branch:	Test NSW Branch		
Losing Organisation:	Test NSW Club		
Sub-Membership Category:	Non Member Participants		
Member Details			
Member ID:	4688026		
First Name:	test		
Last Name:	person		
Gender:	Male		
Date of Birth:	28/09/1995		
Contact Number:	9960734408		
Email Address:	vinit.chaware@fieldsolutions-group.com		
The member is in the following organisations:			
Organisation	Registered Season	Competitive Rights	Status
Test NSW Club	2017 - 2018	Yes	Active
TestNSW 2 Club	2018 - 2019	No	Active
Create Details			
Date:	18/02/2019		
By:	Travis Klerck		
Comment:	test		
Endorsed/Not Endorsed Details			
Date:	18/02/2019		
By:	Travis Klerck		
Comment:	Endorsed.		
Approved/Rejected Details			
Date:	18/02/2019		
By:	Travis Klerck		
Comment:	Approved.		
Completed/Refused Details			
Date:	18/02/2019		
By:	Travis Klerck		
Comment:	Completed: test		
Archive Details			
Date:			
By:			

See Transfer Process Below:

Transfer Details	
Transfer ID:	603
Transfer Type:	Full
Transfer Status:	New
Winning Club	
Winning State:	Life Saving Victoria
Winning Branch:	Flinders (District)
Winning Organisation:	Gunnamatta
Losing Club	
Losing State:	Life Saving Victoria
Losing Branch:	Morrison
Losing Organisation:	Rossmore
Member Details	
Member ID:	4621778
First Name:	Georgia
Last Name:	Cripps
Gender:	Female
Date of Birth:	06/06/1968
Contact Number:	98940090
The member is in the following organisations:	

Create Details	
Date:	17/09/2015
By:	Online Renewals
Comment:	Initiated from Lifesaving Online.
Endorsed/Not Endorsed Details	
Date:	
By:	
Comment:	
Approved/Rejected Details	
Date:	
By:	
Comment:	
Completed/Refused Details	
Date:	
By:	
Comment:	
Archive Details	
Date:	
By:	

Can be created by Member via Lifesaving Online in Members Portal, Winning or Losing club

Action by "Losing" Club

Action by Losing State Centre or Branch

Action by "Winning" Club

Action by 'Winning' or 'Losing'

Create — this is done by either the winning or losing club or by a member via Lifesaving Online.

Endorsed/Not Endorsed Details — this step is done by the losing club.

Approved/Rejected — this step is done by the losing Branch or State office.

Completed/Refused — this step is done by the Winning club.

Archive — this step is done by either the Winning or Losing club.

When a transfer request has been initiated in SurfGuard a member's transfer history is displayed at the bottom of the screen.

Alternatively, a member transfer report can be obtained from the Reports section. (General Reports > Transfer Reports)

Hide Member Transfer History

Member Transfer History					
Transfer ID	Winning Organisation	Losing Organisation	Type	Status	Created Date
38584	Test QLD Club	Test NSW Club	Full Transfer	Archived (Completed)	19/12/2012
*97022	Test NSW Club	Test QLD Club	Full Transfer	Completed	21/12/2018

* Current transfer.

Total Full and Competitive-Rights transfers this calendar year (excluding this transfer): 0.

The system will also indicate how many transfer requests the member has had for the calendar year.

3.8 Quick Member Reports

Quick Member Report is already pre-formatted in the system and no other filtering is available.

There is currently one Quick Member Report available

1. Member Contact Details

3.9 Managing Members Webinar

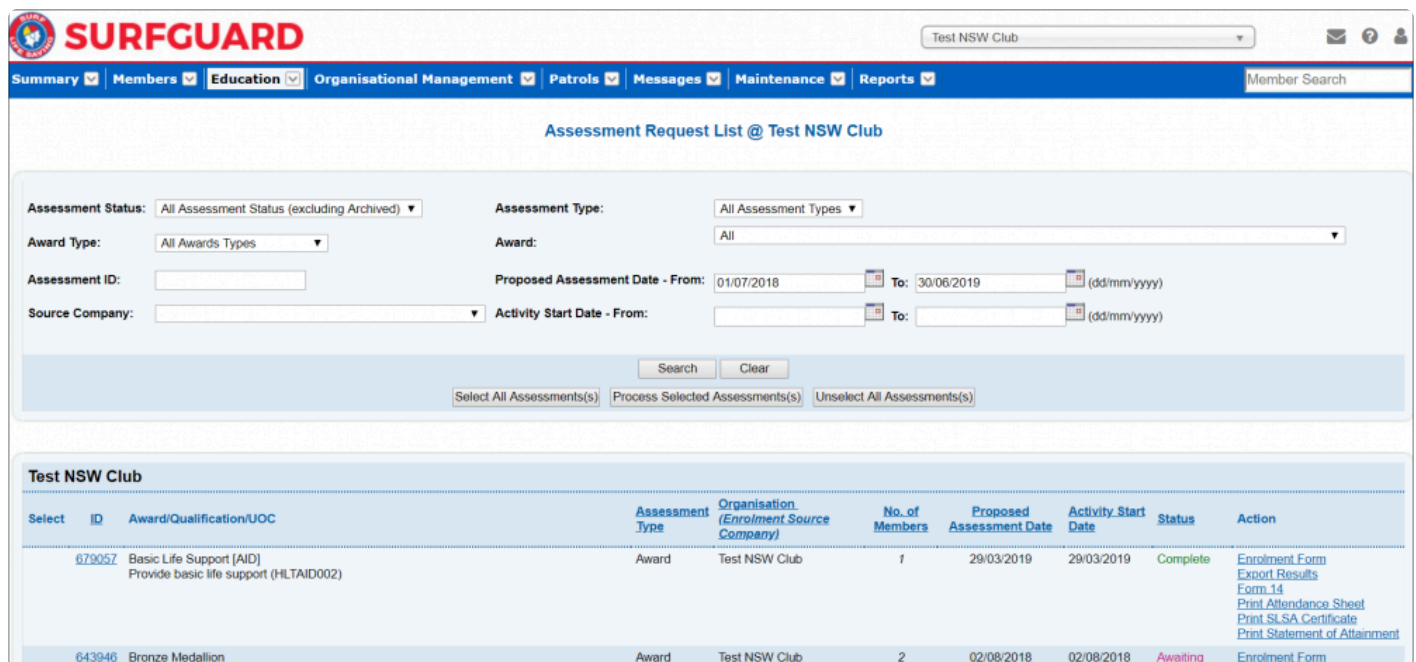
Overview of Managing Members within Surfguard and associated systems, presented as a webinar on 16th July 2019.

4. Education

4.1 Assessment Request List

By clicking the sub-menu item 'Assessment Request List' you can view all assessment requests that fall within your club.

Select from the drop-down options to short-list specific assessments.



SURFGUARD Test NSW Club

Summary Members **Education** Organisational Management Patrols Messages Maintenance Reports Member Search

Assessment Request List @ Test NSW Club

Assessment Status: All Assessment Status (excluding Archived) Assessment Type: All Assessment Types

Award Type: All Awards Types Award: All

Assessment ID: Proposed Assessment Date - From: 01/07/2018 To: 30/06/2019 (dd/mm/yyyy)

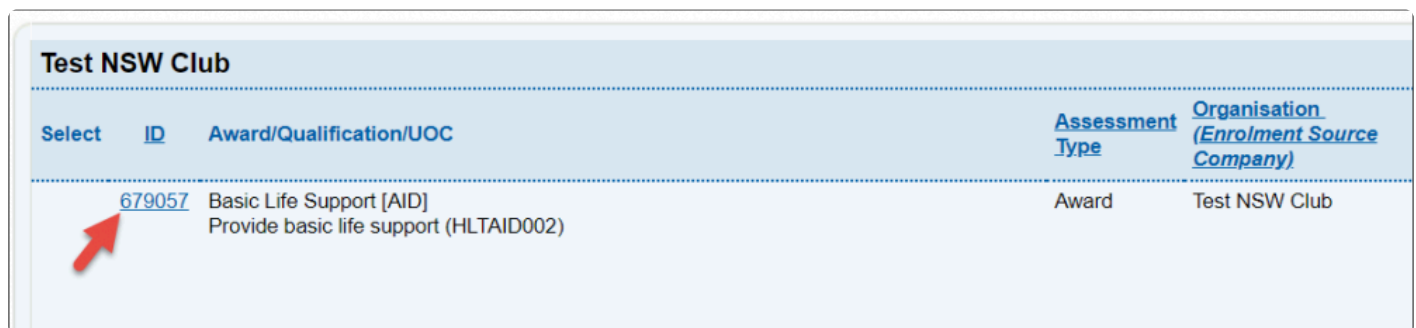
Source Company: Activity Start Date - From: To: (dd/mm/yyyy)

Search Clear

Select All Assessments(s) Process Selected Assessments(s) Unselect All Assessments(s)

Select	ID	Award/Qualification/UOC	Assessment Type	Organisation (Enrolment Source Company)	No. of Members	Proposed Assessment Date	Activity Start Date	Status	Action
	679057	Basic Life Support [AID] Provide basic life support (HLTAID002)	Award	Test NSW Club	1	29/03/2019	29/03/2019	Complete	Enrolment Form Export Results Form 14 Print Attendance Sheet Print SLISA Certificate Print Statement of Attainment
	643946	Bronze Medallion	Award	Test NSW Club	2	02/08/2018	02/08/2018	Awaiting	Enrolment Form

Once you have added a new assessment request, it will appear in the Assessment Request List. Each assessment created is given an ID number. Click the ID number to see more information about a specific Assessment.



Test NSW Club

Select	ID	Award/Qualification/UOC	Assessment Type	Organisation (Enrolment Source Company)
	679057	Basic Life Support [AID] Provide basic life support (HLTAID002)	Award	Test NSW Club

You can sort the list of assessments by ID, Assessment Type, Organisation, Number of Members, Proposed Assessment, Activity Start Date or Status by clicking the respective column header.

You will also see on the Assessment Request Screen that the Status of the assessment is color coded.

Note: Clubs should check with their Branch or State office regarding who actions each step of the assessment.

Status	Color	Description
Incomplete	Red	Assessment needs to be submitted, updated or deleted
Awaiting Approval	Orange	Branch or State have to approve the assessment
Approved	Purple	Assessment request has been approved by Branch or State but the assessment has not been done.
Awaiting Candidate Approval	Pink	Results have been entered for each member as either C/DNA/DNC/NYC
Award Allocation	Blue	Done By State
Complete	Green	Archived by State

Assessment Documentation

On the Assessment Request list under the “Action” tab there are a number of documents you can download and print relating to the assessment

- **Enrolment Form** – you can view, save and/ or print a PDF file which lists all the attendees for the specified course.
- **Attendance Sheet** — you can view, save and/ or print a PDF file which lists all the attendees for the specified course.
- **Form 14** — generates a pre-filled document with details of the assessment, candidate’s details and Competency Status for the assessment.

To see what steps have been completed on an assessment look at the “Assessment History”.

Assessment History

To see what steps have been completed in an assessment

1. Click the Assessment ID.
2. Scroll to the bottom of page
3. Click “Show Assessment History”

Assessment History			
Date	Action Performed	By	Level
Fri 29/03/2019 20:10:48	Created	System	National
Fri 29/03/2019 20:11:03	Submit	System	National
Fri 29/03/2019 20:11:11	Approve	System	National
Fri 29/03/2019 20:11:22	Process Results	System	National
Fri 29/03/2019 20:12:26	Approve Candidates	System	National
Fri 29/03/2019 20:13:52	Allocate Award(s)	System	National

4.2 New Assessment Requests

New Assessment Request page has a number of sections. Scroll down to view more details for some of the sections

1. Assessment Details
2. Award Details
3. Units of Competency
4. Contact Information
5. Assessors
6. Trainers
7. Enrolment Source Details
8. Comments
9. Candidates
10. List Candidates In Other Assessments
11. External Candidates

Assessment Details

Assessment Type

- **Award** – Upon the successful completion of an assessment, the member is allocated the new award(s)
- **Proficiency** – The member must already hold the award in order to participate in the assessment for a proficiency. Upon successful completion of the assessment, the member's award record(s) is/ are updated with the proficiency date.
- **Bulk Proficiency** – One-step processing of Skills Maintenance/ Proficiencies. The bulk proficiency process cuts out three stages of the approval process in a current proficiency assessment (States can restrict function if they wish).

- **Credit Transfer** – Upon the successful completion of an assessment, the member is allocated new award(s) but does not have to actually sit an assessment since they already did the assessment at another external organisation. It is when an award is exactly the same. An example is Red Cross/ St John's First Aid, a member will be given Credit Transfer as it is identical as the SLSA award.
- **Recognition of Current Competence/ Prior Learning** – Upon the successful completion of an assessment, the member is allocated new award(s) but does not actually sit an assessment since they have the experience from such things as work, etc.

Assessment Dates

New: Assessment Request @ Test NSW Club

Assessment Details

Assessment Type: *

Time (24hr): *

Activity Start Date: * (dd/mm/yyyy)

Proposed Assessment Date: * (dd/mm/yyyy)

Planned Total Training and Assessment Time in Hours :

Planned Aquatic Activity Time in Hours :

Commercial course / Fee for Service course:

Award Details

Award Type:

Award:

Delivery Mode:

Funding Source:

Equivalent Award: N/A

Allocate/Update Equivalent Award:

Do Not Allocate SLSA Award to Public Members:

Units of Competency

This is the date the candidates commence training

The date the candidates are assessed

Award Details and Units of Competency

Award Types

The default is to display All Award Types, however, from the drop-down you can select

- AQTF Module
- AQTF Qualification
- AQTF Unit of Competency
- Other
- Recognition
- Service
- SLSA Education

Awards

The awards drop-down will show all Awards based on the Award Type selected. **Note:** awards that have been created for a specific State will only display for Users in that State eg QLD Tractor Induction will only display for Queensland Users.

Units of Competency (UOC)

The UOC's are all added in the Award creation and will prefill based on the selected Award.

The screenshot shows the 'Award Details' form with the following fields:

- Award Type:** SLSA Education
- Award:** Bronze Medallion
- Delivery Mode:** Classroom based
- Funding Source:** Domestic full fee-paying client
- Equivalent Award:** Certificate II in Public Safety (Aquatic Rescue) (PUA21012)
- Allocate/Update Equivalent Award:**
- Do Not Allocate SLSA Award to Public Members:**

The **Units of Competency** section is divided into two columns:

- Available:** Provide cardiopulmonary resuscitation [CPR] (HLTAID001)
- Selected:**
 - Apply surf awareness and self-rescue skills (PUASAR012C)
 - Communicate in the workplace (PUACOM001C)
 - Follow defined occupational health and safety policies and procedures (PUAOMS001C)
 - Operate communications systems and equipment (PUAOPE013A)
 - Participate in an aquatic rescue operation (PUASAR013A)
 - Provide basic emergency life support (HLTFA211A)
 - Work effectively in a public safety organisation (PUATEA004D)

Navigation arrows (> and <) are located between the two columns.

Assessors and Trainers

If you need to add an Assessor or Trainer to an assessment you can search by either Member ID or First Name and Last Name. Once the Assessor or Trainers appears in Available on LHS you can use the > to move them across to Selected.

Assessors

Enter either the Assessor's Member ID or all or part of the Assessor's name before clicking Get Assessors/Facilitators.

Search Assessor Member ID:

Search Assessor First Name:

Search Assessor Last Name:

Available:

Selected:

Trainers

Enter either the Trainer's Member ID or all or part of the Trainer's name before clicking Get Trainers.

Search Trainer Member ID:

Search Trainer First Name:

Search Trainer Last Name:

Available:

Candidates

To retrieve a list of eligible members for the Award you have two options

1. Search by Member ID, First Name or Last Name and click Get Candidates; or
2. Click Get candidates button

A list of members will appear that fulfil all prerequisite requirements for the chosen award. Eligible candidates, who fulfil all prerequisite requirements for the chosen award, will appear in Available on LHS you can use the > to move them across to Selected on RHS.

3. If a member does not display and you believe they are eligible, tick the box next to **Include Non-Financial Members**

Only members who are not already in another incomplete assessment request for the chosen award or proficiency will be listed in the available candidate's list.

To view the prerequisites for an award, use the **Award Reference Report** at bottom of the screen.

4.3 Assessment Candidate Qualifications Check

If candidates, trainers or assessors do not appear when you are creating a new assessment, you need to select **Assessment Candidate Qualification Check** from the Education tab drop-down

1. If you have an Assessment ID enter the number and click Get Assessment Details
2. If you don't have an Assessment ID then make sure you
 - a. Select the correct Assessment Type
 - b. Enter the proposed Assessment Date
 - c. Select the Award from the drop-down

Scroll down to the Select Person section and

1. Select position for qualification check from the drop-down (either Candidate, Assessor, Training Officer)
2. Enter either the Member ID or First and Last Name
3. Click Check at bottom of the screen
4. The reason for the member, not displaying will appear in Results at bottom of the screen

Assessment Candidate/TAF Qualifications Check @ Test NSW Club

Assessment Details

Enter the Assessment ID or the Assessment and Award Details

Assessment ID: [Get Assessment Details](#)

Assessment Type: *

Proposed Assessment Date: * (dd/mm/yyyy)

Award Details

Award Type:

Award: *

Equivalent Award:

Allocate Equivalent Award:

Units of Competency

Available: <div style="border: 1px solid #ccc; height: 80px; width: 100%;"></div>	Selected: <div style="border: 1px solid #ccc; padding: 5px; width: 100%;">Operate and maintain a small powercraft and motor for rescue operations (PUASAR014A) Prepare maintain and test response equipment (PUAEQU001B)</div>
---	--

Select Person:

Select position for qualification check:

Include non financial candidate

Member ID:

First Name:

Last Name:

[Check](#) [Cancel](#)

Results:

The candidate does not fulfill the prerequisite conditions for the award :
- Proficient in Bronze Medallion AND Proficient in IRB Crew Certificate. => The candidate does not hold the award IRB Crew Certificate. => The candidate is not proficient in Bronze Medallion

5. Organisational Management

5.1 Organisational Details

The Organisational Details sub-menu allows users to view the official contact details and other general details of their own Surf Lifesaving organisation.

Clubs, Branches and States can add their logo and other details that relate to the organisation.

It is vital that Clubs, Branches, and States complete this area accurately, as it determines how all other parts of the SLSA organisation contact you.

Users can *edit *information for which they have administrative access — in other words, Club Secretaries can only edit Club information and Branch officials can only edit Branch information, and so on.



Organisational Details: Test NSW Club

Surf Life Saving NSW : Test NSW Branch

General Details		Physical Address	
Organisation ID:	544	Address Line 1:	Upstairs level
Display Name:	TEST NSW Club	Address Line 2:	789 botany rd
ABN:	123	Suburb:	rosebery
DGR Number:		State:	NSW
INC Number:		Post Code:	2018
Fundraising Authority No:	23452rtegf	Country:	Australia
History:	This is a test club for t6esting purposes		
Organisation Colours:		Postal Address	
Logo Description:	blah blah blah	Street & No:	upstairs 789 botany rd
Organisation Cap:		Suburb:	Rosebery
Cap Description:	cap test	State:	NSW
Local Gov. Area:		Post Code:	2018
Beach Name:	Test Beach	Country:	Australia
Beach Key:	nsw846790a	Contact	
Map Reference:	657678ffuy	Name:	Helpdesk
GPS Latitude (decimal format):		Phone (with area code):	1300724006
GPS Longitude (decimal format):		Mobile:	
GPS Datum:		SMS Details	
Office Phone (with area code):	0292158000	SMS Enabled:	[x]
Office Fax (with area code):		Max SMS/Year:	Unlimited
Email:	ithelp@slsa.asn.au		
Website:	www.sls.com.au		
Facebook Uri:			
Twitter Uri:			
Entity Phone (with area code):	0292158001		
Entity Fax (with area code):	029158000		

Edit

5.1.1 Bank Account Details

To view or edit the bank account details stored in Surfguard for a club or support entity, click Organisational Details > Bank Account Details.

To edit these details your Surfguard account must have Organisational Management permissions. Click on

the Edit button to revise the stored details.


Note: DDR Form submitted can only be modified by national Surfguard users and this is only modified when a club or support entity signs up for the Payment Gateway. DDR form is required when initially setting up Payment Gateway.

Entities can make their banking account details become viewable to users within the Members Area and associated payment notification screens.

To activate this, check the Allow Direct Deposit box from within the Organisational Management Tab. (Organisational Details > Bank Account Details > Edit)

Update Bank Account Details @ Test NSW Club

Bank Account Details

BSB Number: *	<input type="text" value="111"/> - <input type="text" value="222"/>
Bank Account Number: *	<input type="text" value="12345678"/>
Bank Account Name: *	<input type="text" value="TEST"/>
Email Address: *	<input type="text" value="lthelp@slsa.asn.au"/>
Is Default Bank Account:	<input checked="" type="checkbox"/>
Allow Direct Deposits:	<input checked="" type="checkbox"/> 

Online Payment Gateway

DDR Form Submitted:	<input type="checkbox"/>
DDR Form Unsubscribe Date:	N/A

See how the banking details display to users below

The screenshot displays the 'SURF CLUBS' section of the SLSA Online system. On the left, a table lists details for the 'Test NSW Club'. On the right, a pop-up window titled 'Bank Details - Test NSW Club' shows account information.

Test NSW Club	
Branch	Test NSW Branch
State	Surf Life Saving NSW
Registered Season	2018
Membership Category	Award Member
Competition Rights	Yes
Competition Age Category	Under 21
Child Protection Completed	Yes (Expires 06/05/2020)
Online Payments	Direct Deposit Information

Buttons: [Renew](#) [Change Category](#)

Bank Details - Test NSW Club

BSB Number: 111222
 Account Number: 12345678
 Account Name: TEST

[\[Close Window\]](#)

5.2 Service Profiles

The 'Service Profiles' sub-menu takes you to a screen that allows you to further edit the profile of your Club. This includes nominating the Club's service hours and patrol details.

It is important that each organisation's Service Profile is kept up-to-date as this information is transferred to the Beachsafe website.

If your club patrols at more than one beach, a service profile must be created for each beach.

If a service profile is created/ edited the page will provide a time stamp of who last updated the section, with a date and time.

If your club patrols at more than one beach, you must create a service profile for each beach.

Go to Organisational Management > Service Profile > Add Beach Profile

Click the relevant link to edit each section of the Profile

Service Profiles @ Test NSW Club - test1a

Select a Beach:

> test1a

test2

[Add Beach Profile](#)

Beach: test1a [Edit Beach Name](#)

Date Period	Service Hours	Edit Delete
01 Jan - 07 Feb	Mondays:	08:00 - 18:00
	Tuesdays:	04:00 - 18:00
	Wednesdays:	08:00 - 18:00
	Thursdays:	00:00 - 00:00
	Fridays:	00:00 - 00:00
	Saturdays:	11:00 - 18:00
	Sunday/Public Holidays:	08:00 - 18:00
Last Updated By: Travis Klerck Updated Date: 03/09/2018 22:53:17		
08 Feb - 01 Jun	Mondays:	08:00 - 16:00
	Tuesdays:	12:00 - 15:00
	Wednesdays:	12:00 - 15:00
	Thursdays:	12:00 - 15:00
	Fridays:	00:00 - 00:00
	Saturdays:	08:00 - 16:00
	Sunday/Public Holidays:	08:00 - 16:00
Last Updated By: Rebecca Cocks Updated Date: 07/02/2017 08:28:21		
	Mondays:	09:00 - 10:00
	Tuesdays:	00:00 - 10:00

5.3 Committees

The 'Committees' sub-menu allows clubs to group members into functional committees.

You can assign new committee's a name and nominate positions including the chairperson, secretary, treasurer, and members by completing the 'Add Committee Details'

To view an existing committee click the 'Name' link and a list of those committee members will be displayed. To edit an existing committee click the 'Members' button in the User Options and change the composition of a committee by selection a member from the left side column and placing them into the right side column. Click 'Save'

BOM 19/20 Membership Settings

Aaron, Kate (3660875) 11/11/1987	< Chairperson >	Fownes, Paul (3660067) 08/08/1962
Aaron, Rosalie (5795589) 08/12/2012	< Secretary >	Garay, Marcelo (4644005) 21/10/1965
Ackman, Aisha (5857425) 19/04/2011	< Treasurer >	Rutherford, Yvette (3660048) 06/05/1966
Adams, Blaze (5848154) 23/08/2012		Cooney, Nicole (5494048) 22/05/1978
Adams, Miller (5848156) 06/03/2014		McLean, Darren (4668934) 08/08/1968
Adlawan, Samantha Kyleigh (5849206) 05/03/2014		Perrin, Linda (3659954) 01/12/1960
Airlie, Cameron (4475338) 26/03/1982		Turton, Greg (5666970) 29/09/1971
Alban, Isaac (5852278) 28/02/2013		
Alexiou, Amelia (5701077) 15/02/2011		
Alexiou, Damien (5416345) 26/05/1975		
Alexiou, George (5653101) 19/03/1969		
Alexiou, Jasmine (5596564) 10/12/2007		
Alexiou, Liliana (5581384) 14/08/2005	< Member >	
Alexiou, Matthew (5416339) 24/07/2007		

To remove the committee from the database, click the 'Delete' button.

Most Clubs have a number of Committees and each Club should have a Surfguard record of their Management, Lifesaving, and Surf Sports Committees.

Committees @ South Maroubra

Add Committee Details

Name:

Please select the positions you require to be on this Committee/Board

Positions:

Type: Committee Board

Name	Type	User Options		
BOM 19/20	Board	Members	Edit	Delete
Competition Committee 19/20	Committee	Members	Edit	Delete
Constitution Committee 19/20	Committee	Members	Edit	Delete
Disciplinary Committee 19/20	Committee	Members	Edit	Delete
Endorsed Club Trainers & Assessors	Committee	Members	Edit	Delete
Finance Committee 19/20	Committee	Members	Edit	Delete
Life Membership Committee 19/20	Committee	Members	Edit	Delete
Lifesaving Committee 19/20	Committee	Members	Edit	Delete
Sub Committee Heritage Room Memorabilia	Committee	Members	Edit	Delete
Trainers & Assessors incl probat	Committee	Members	Edit	Delete
Youth Committee 19/20	Committee	Members	Edit	Delete

5.4 Internal Memberships

The 'Internal Memberships' sub-menu has two options which allows you to manage internal memberships or add new internal membership categories.

Internal memberships are those specific to your club but are not recognised outside the club, such as gym membership, social club membership, school groups etc

Internal Memberships @ South Maroubra

Internal Membership Category	Display Order	User Options	
Gold Member 2019	1	Edit	Delete
Gym Member 2019	2	Edit	Delete
Dolphins 2019	3	Edit	Delete
GYM 2018	4	Edit	Delete
Gold Member 2018	5	Edit	Delete

[Add New Internal Membership Category](#)

5.4.1 Adding Internal Memberships

To add a new category of internal membership, use the sub-menu option or click the 'Add New Internal Membership Category' button.

This will take you to the 'Add New Internal Membership' screen, which allows you to nominate the name of a Internal Membership Category

Add New Internal Membership @ Test NSW Club

Intl Membership Category: *

Display Order:

The display order column will simply display the internal memberships in your selected order.

To add members to an Internal Membership Category, you must move them into the category while editing the member's record within the Internal Memberships field box.

Internal Memberships

Perpetual Including L 5Yrs No Locker or G 10Yrs Including Lock 10 Yrs No Locker or	<input type="button" value=">"/> <input type="button" value="<"/>	Nippers Parents Patrol team 13
---	--	-----------------------------------

5.4.2 Bulk Processing Internal Memberships

If you have many members who need to be added to an Internal Membership you can use Bulk Processing:

1. Go to Bulk Processing under the Members tab.
2. Select Process Type — Internal Membership.
3. Select Internal Membership Category.
4. Click Search and move members to be added across to Selected Members.

Bulk Processing for Test NSW Club

Process Type:

Filter Available Members further: (recommended for organisations with a large amount of members)

Member ID:

First Name:

Last Name:

Internal Membership Category:

Add Members
 Remove Members
 Include Non-Active Members

Available Members:	Selected Members: *

5.5 Officers

The Officers menu has three sub-menus under it: Officers, New Officer Position, and Officer Position Synonyms.

All three items relate to the establishment and management of individuals ('Officers') who have specific responsibilities within your club.

To view the member details of an Officer, simply click their name.

You can change the data on this screen by clicking the 'New', 'Edit' or 'Delete' buttons, as shown below in

View Officers @ Test NSW Club

Held Position From: To: Format: dd/mm/yyyy

Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
Chairman	National, State, Branch, Club	Bee McGinty Bumble	31/05/2018	22/09/2018		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Digital Communications Executive	State, Branch, Club					<input type="button" value="New"/>
HAMster	State, Branch, Club					<input type="button" value="New"/>
MPIO	State, Branch, Club					<input type="button" value="New"/>
Medic	State, Club					<input type="button" value="New"/>
After Hours Emergency Contact	State, Branch, Club					<input type="button" value="New"/>
BBQ Chef	Club				<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/>
Chief Training Officer	National, State, Branch, Club	Klerck Travis	30/08/2018	22/12/2019		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Complaints Officer 1	National, State, Branch, Club	Cocks Rebecca	01/06/2019	31/12/2020		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Complaints Officer 2	National, State, Branch, Club					<input type="button" value="New"/>
Complaints Officer 3	National, State, Branch, Club					<input type="button" value="New"/>
Digital Communications Executive	Club				<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/>
JS Tester	Club	Testerman Joshua	28/06/2018	28/06/2019	<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Junior Activities	National, State, Branch, Club					<input type="button" value="New"/>
Lifesaving	National, State, Branch, Club	Klerck Travis	30/05/2018	24/06/2019		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
MPIO Officer for Claire	Club				<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/>
Member_Services	State, Branch, Club					<input type="button" value="New"/>
OH&S	State, Branch, Club					<input type="button" value="New"/>
OHS Assessor	Club				<input type="button" value="Edit"/> <input type="button" value="Delete"/>	<input type="button" value="New"/>

See Webinar below on how to assign Administrative Functions in the Officer section in SurfGuard.

5.5.1 Setup Officer Position

To assign someone to a position, click the 'New' button beside that position. This will enable you to add a club member to fill that position; you must also choose the dates that the member held that position.

The Officer Position Synonyms area is used to rename positions that have been set by SLSA. For example, your club might call their Education position a Surf Teacher, therefore, renaming the positions to better relate to your organisation.

To add a new officer position to your club, click the 'New Officer Position' sub-sub-menu. This will open another screen that allows you to enter the name of the new position



Setup Officer Position @ Test NSW Club

Officer Position

Officer Position Name:

5.5.2 Officer Admin Functions

Once an Officer has been added into a position there is the option to 'Edit' the officer.

By editing the position you will be able to select an Officer, select a date and assign Administrative Functions.

[New Officer Position](#) [Setup Officer Position Synonyms](#)


Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
Chairman	National, State, Branch, Club		29/01/2020	29/01/2021		New Edit Delete
Digital Communications Executive	State, Branch, Club					New


Select the Administrative Functions you wish to assign with the relevant date.

Allocate Officer

Officer Position Name: Chairman

Officer: *

From Date: * 

To Date: * 

Administrative Functions

- Approve Members Area News content
- Approve Members Area Library content
- SLSA Online Member Store/Shop Administrator
- Online Form Approver

[Update](#) [Reset](#) [Cancel](#)

5.5.3 Officer Position Synonym

Different clubs and organisations will use different types of Officer names.

To rename your officer positions simply navigate to the Officer Position Synonym section in SurfGuard.

Organisational Management > Officers > Officer Position Synonym

To rename a position simply type the new position name in the box next to the Officer Name and hit 'Save'

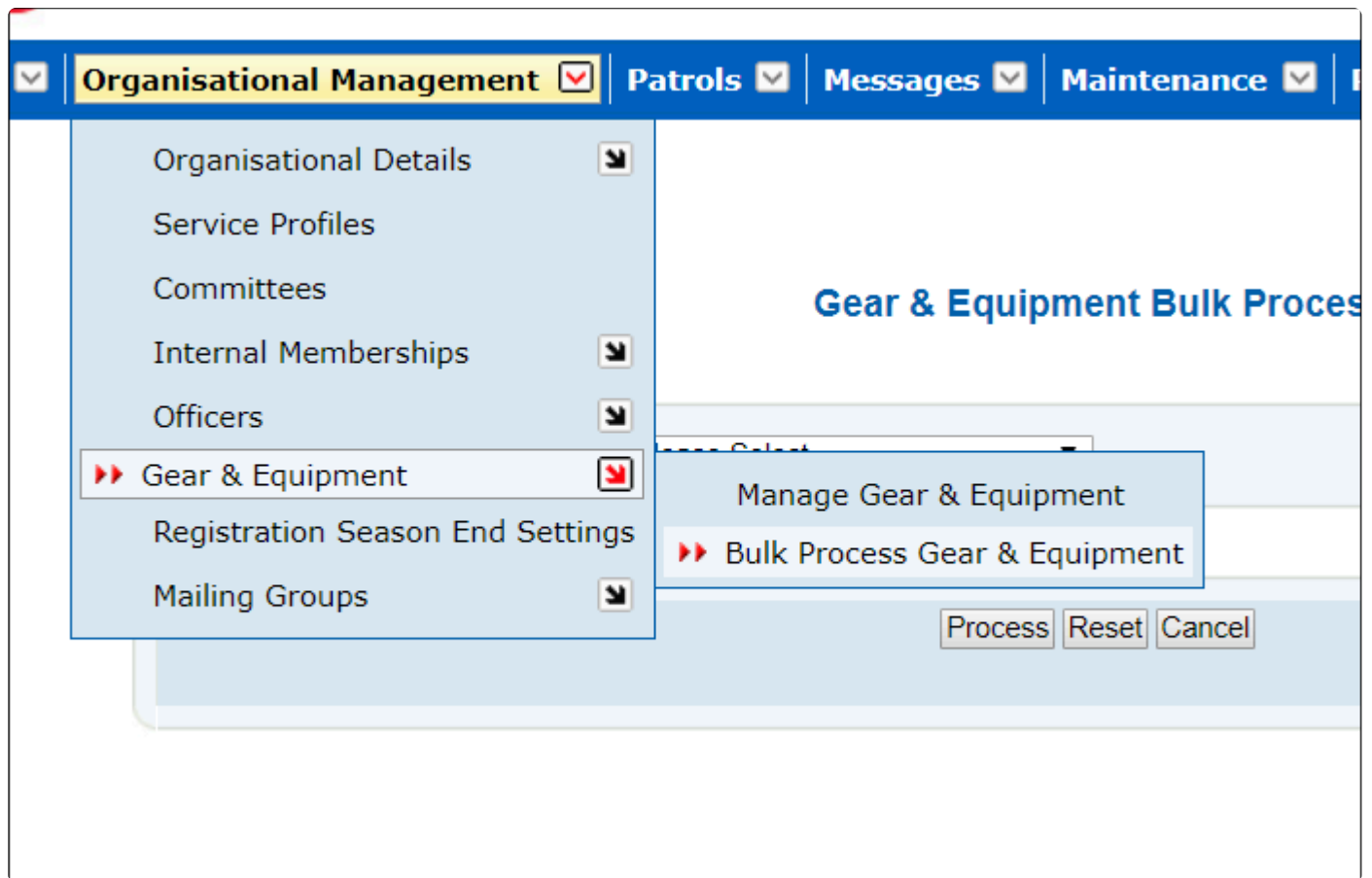
Officer Position Synonyms @ Test NSW Club

Officer Name	Officer Synonym
Active Kids Voucher 1	<input type="text"/>
Active Kids Voucher 2	<input type="text"/>
Active Kids Voucher 3	<input type="text"/>
Administration	secretary2
After Hours Emergency Contact	<input type="text"/>

5.6 Gear and Equipment

'The Manage Gear & Equipment' sub-sub-menu option allows you to view a list of all the equipment, tools and other resources that the club owns. From this screen, any item's details can be added/modified by clicking the 'Manage' button. — from there you can add, edit and delete items of equipment each piece of equipment is allocated specific attributes that relate to the type of equipment

Users can also Bulk Process Gear and Equipment from here.



5.6.1 Manage Gear & Equipment

How to print a checklist

To print a checklist for a piece of equipment, select the “Print Checklist” button beside the required piece of equipment. You can only print a checklist when you have entered at least one piece of gear into an equipment type.

You can also print a “View Patrol Equipment Checklist” from the screen shown in the Gear and Equipment management screen.

View Gear & Equipment @ Test NSW Club

Add blank columns when printing checklist(s)

[Print All Checklists](#) [View Patrol Equipment Checklist](#)

Type	Total	Options	
Administration Equipment	0	Manage	
Beach Vehicle (ATV)	0	Manage	
Buildings and Structures	0	Manage	
Club Equipment	0	Manage	
Competition Equipment	1	Manage	Print Checklist
Computer and Electrical	0	Manage	
Defibrillator	0	Manage	
First Aid Equipment	0	Manage	
Fuel Cell	0	Manage	
Inflatable Rescue Equipment	0	Manage	
IRB	1	Manage	Print Checklist
IRB Motor	0	Manage	

5.7 Registration Season End Settings

“Registration Season End Settings”, under Organisational Management allows clubs to manage the end of their season.

Clubs will now need to mark when their registration season ends in order to freeze the Summary statistics for Membership Categories.

If the registration season summary statistics period is not ended manually, it will be automatically ended on June 30 of the current year at 11:59pm EST.

The ending of the registration season only affects the Summary screen.

Registration Season End Settings @ Test NSW Club: 2018 Season

Display Criteria	Organisation	Membership Statistics End Date
Season: <input type="text" value="2018"/> <input type="button" value="Go"/>	Test NSW Club	<input type="button" value="Close Current Season Summary Statistics"/>

Information

Closing the summary statistics for the current season will affect the Membership Categories summary screen only.

Doing so will mean that any changes to a member's membership details (e.g. archiving the member) from this date onwards will NOT be reflected in the Membership Categories summary for this season.

This will not affect Reports. Any changes made to a member's details after the close date will still be reflected in Reports.

If the registration season summary statistics period is not ended manually, it will be automatically ended on June 30 of the current year at 11:59pm EST.

Please contact the help desk if the membership statistics for the current season were closed accidentally and need to be re-opened.

5.8 Mailing Groups

The 'Mailing Groups' sub-menu allows you to view various sets within the database that form specific mailing groups. The mailing groups are used to sort your members into family or other groups whereby you can easily create mailing labels or report on them.

The screenshot displays the SURFGUARD web application interface. At the top, the 'SURFGUARD' logo is visible. Below it is a navigation bar with tabs for 'Education', 'Organisational Management', 'Patrols', 'Messages', 'Maintenance', and 'Re'. The 'Organisational Management' tab is selected and expanded, showing a list of options: 'Organisational Details', 'Service Profiles', 'Committees', 'Internal Memberships', 'Officers', 'Gear & Equipment', 'Registration Season End Settings', and 'Mailing Groups'. The 'Mailing Groups' option is highlighted, and its sub-menu is also expanded, showing 'Mailing Groups', 'New Mailing Group', and 'Mailing Group Types'. The main content area is titled 'Mailing Groups View @ Test' and contains two filter fields: 'Mailing Group Type' (set to 'All') and 'Member' (set to 'All'). Below these filters, a table is partially visible with columns labeled 'Type' and 'Group Name'.

The pre-set mailing group types include 'Board', 'Family', 'Committee' and Patrol Groups. Users can also create new mailing group types.

You can view all your mailing groups by clicking the drop-down arrow beside 'Mailing Groups' on the menu tab, then clicking 'Mailing Group' on the submenu. Select 'All' from the Mailing Group Type drop-down list to display a complete list.

Mailing Groups View @ Test NSW Club

Mailing Group Type:

Member:

New Mailing Group
New Mailing Group Type
View Mailing Group Types

Type	Group Name	Actions	
Committee	abc		
Committee	Awards		
Committee	Education		
Committee	Family_Group_1		
Family	Boink	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Family	Suuuuuuuuuu	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Family	test	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

5.8.1 New Mailing Group

You can add a new Mailing Group by clicking the 'New Mailing Group' button or sub-menu. You can select members from the Add/ Delete Mailing Group Members column by using the add (>) or remove (<) arrows. The mailing group must be given a name and a type of group selected. A primary member for the group can also be chosen.

As an example, if you were to enter a new mailing group for the Smith family. You would select Family as the group type, Smith Family as the name of the group and choose the mother or father of the Smith family as the Primary member. Then the rest of the Smith family can be selected using the Add/ delete members section on the right

Click 'Submit' to add the Mailing Group. You can then do this for all your families within the club to have a

complete list of your families, the members in them and the primary mailing member. You will also notice that your committee's and patrol teams are automatically created as mailing groups. When a patrol team is changed, those changes will automatically reflect in the mailing group's area. For the purpose of a primary member, the Patrol Captain is selected.

Mailing Group Add @ Test NSW Club

Mailing Group Type Family ▼

Mailing Group Name

Primary Member smith, bob (5675993) 23/04/1970 ▼

Add/Delete Mailing Group Members

bobbyyy, johnny (5729957) 13/11/2003 bombo gamoonix, cabbage (5692089) 16/04/1987 Bond, James (5689261) 12/12/1978 Bond, James (5711018) 18/05/1984 Boo, Becky (5841995) 05/10/1965 Boonda, Gammy (5689252) 12/12/1980 Bova, Catherine (5776536) 07/08/1964 Box, Brand (5524350) 14/11/1966 Bradman, Mark (4263834) 12/07/1956 Browne, Penelope (5844080) 15/01/1976 Bryce, Fannie (5630867) 21/09/1989 bumblebelly, bing bling (5641282) 03/03/1999 bumblebimby, boogerbango (5673210) 23/04/1980 Bunny, Benny (5651112) 01/10/1966 Bunny, Bugs (5742325) 05/10/1965 Bunny, Little (5651121) 01/01/2008 Burgess, George (5678616) 04/06/1999 Burgess, Sammy (5678614) 05/05/1983 chanel, coco (5691491) 29/07/1992 Chapman, Jack (5769122) 01/01/1995 Chiller, Kitty (5612902) 01/01/1950	▲ ▼ > <	test, ron (5638766) 19/11/1966 Test, Bec (5659679) 28/03/1969
--	--------------------------	--

SUBMIT
CLEAR
CANCEL

5.8.2 Mailing Group Types

SurfGuard contains a number of established mailing group types. These can be viewed by going to the 'Mailing Group Types' sub-menu,
 The different types of mailing groups can be accessed by clicking the relevant hyperlink.

Mailing Group Types View @ Test NSW Club

All Mailing Group Types

Type	Actions
Board	
Committee	
Family	
My specials	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Patrol	
Surfcom	

To add a new mailing group type, you can click the 'New Mailing Group Type' button on the Mailing Group Types screen.

This screen allows you to name a new mailing group. After clicking the 'Submit' button, you will be asked to confirm that you want to create this new group. You will then be able to access this group and add members to it, as described above.

6. Patrols

6.1 Manage Patrol Teams

The Manage Patrol Teams sub-tab has four options:

- Manage Patrol Teams
- Add Patrol Team'
- Add Individual as Team
- Substitution Management

The first option 'Manage Patrol Teams' screen displays the Patrol Teams your club has created.

You can add, edit and view the members of each team by selecting the 'Members' link.

You can schedule a roster for the team by selecting the 'Roster' link.

Other actions are available for renaming or removing the patrol team by clicking the 'Edit' or 'Delete' link under the option.



Patrol Teams @ Test NSW Club

Team Name	Actions
Josh Test Team	Edit Delete Members Roster
YR SEMS TEST	Edit Delete Members Roster

[Add a Patrol Team](#) [Add Individual as Team](#)

6.1.1 Adding Patrol Teams

By clicking the 'Add a Patrol Team' button on the Patrol Teams screen, you can set up a new Patrol Team.

Frist step will be to name the Patrol Team.



Add a Patrol Team

Team Name: *

Once you have created the Patrol Team then you will need to assign Members to that team.

Add Patrol Team

test test has been successfully inserted.

[\[Assign Members to Team\]](#)

[\[Assign Dates/Times to Team\]](#)

[\[Back to Team List\]](#)

When adding new members to a Team, the list will show all active members registered for the current season by default. To view all active members regardless of season, you must check the box marked "Include Non-Financial Members"

When managing your patrol team members it is important to note that they may not hold the correct award(s) to be eligible for the position. SurfGuard will alert you if a member does not hold the correct awards by displaying a red 'No' beside the member. If they do hold the correct awards, SurfGuard will display a green 'Yes'.

For a list of the award requirements, click **Details of Patrol Positions and Awards** at the bottom of the screen.

Team Members - Josh Test Team @ Test NSW Club

Position	Member	Contact Number	Award(s) Held?	Last Proficiency
Patrol Captain	Test Tester	0400770993	No	-
Patrol Captain	Joshua Testerfield	0435100268	No	-
Vice Captain	-	-	-	-
IRB Driver	-	-	-	-
IRB Crew	-	-	-	-
ART Operator	-	-	-	-
Patrol Application Captain	-	-	-	-
First Aid Officer	-	-	-	-
Bronze Member	Cocks, Rebecca	0413457035	Yes	Bronze Medallion: 17/11/2018 Certificate II in Public Safety (Aquatic Rescue) (PUA21012): 28/10/2015 Certificate II in Public Safety (Aquatic Rescue) (PUA21004): 24/03/2010 Certificate II in Public Safety (Aquatic Rescue) (PUA21010): 11/12/2012
Radio Operator	-	-	-	-
Award Member	-	-	-	-
SRC	-	-	-	-
RWC Operator	-	-	-	-
Surfcom Supervisor	-	-	-	-
SurfCom Radio Operator	-	-	-	-
ORB Skipper	-	-	-	-
ORB Driver	-	-	-	-
ORB Crew	-	-	-	-
ORB Trainee	-	-	-	-

Shows as "No" as the two members do not have the award.

Shows as a "Yes" as Rebecca has the correct award & is proficient.

One or more Members fail to meet the awards criteria.


Details of Patrol Positions and Awards

When viewing a patrol team you can also view the Patrol Requirements for your State by clicking the link below.

ORB Crew	-	-	-	-
ORB Trainee	-	-	-	-

One or more Members fail to meet the awards criteria.

[Edit Team Members](#)
[Delete All Team Members](#)
[View Team Roster](#)
[Back to Teams List](#)

 [\[Details of Patrol Positions and Awards\]](#)

✿ Each State has different Patrol Position Requirements if you have any queries I would suggest contacting your State Office directly.

Patrol Position Requirements For NSW Clubs

Patrol Position	Position Type	Award Conditions
Patrol Captain	Lifesaving	Advanced Resuscitation Techniques [AID] AND Silver Medallion Beach Management AND Bronze Medallion OR Bronze Medallion AND Silver Medallion Beach Management AND Advanced Resuscitation Techniques Certificate OR Bronze Medallion AND Silver Medallion Beach Management AND Radio Operator Certificate OR Bronze Medallion AND Silver Medallion Beach Management AND Apply (Senior) First Aid OR Bronze Medallion AND Silver Medallion Beach Management AND Resuscitation Certificate OR Silver Medallion Beach Management AND Bronze Medallion AND Advanced Resuscitation Techniques Certificate OR Silver Medallion Beach Management AND Bronze Medallion OR Silver Medallion Beach Management AND Bronze Medallion AND Spinal Management OR Silver Medallion Beach Management Do Not Use
Vice Captain	Lifesaving	Silver Medallion Beach Management AND Bronze Medallion AND Advanced Resuscitation Techniques [AID] OR Silver Medallion Beach Management AND Bronze Medallion AND Radio Operator Certificate OR Silver Medallion Beach Management AND Bronze Medallion AND Resuscitation Certificate OR Silver Medallion Beach Management AND Bronze Medallion OR Silver Medallion Beach Management AND Bronze Medallion AND Apply (Senior) First Aid OR Silver Medallion Beach Management AND Bronze Medallion AND Spinal Management OR Silver Medallion Beach Management AND Bronze Medallion AND Advanced Resuscitation Techniques Certificate OR Silver Medallion Beach Management Do Not Use OR Silver Medallion Patrol Captain
IRB Driver	Lifesaving	Silver Medallion IRB Driver AND IRB Crew Certificate AND Bronze Medallion
IRB Crew	Lifesaving	IRB Crew Certificate AND Bronze Medallion
ART Operator	Lifesaving	Advanced Resuscitation Techniques [AID] OR Advanced Resuscitation Techniques Certificate OR Resuscitation [AID] OR Resuscitation Certificate

6.1.2 Substitute Management

Access: Patrols > Manage Patrol Teams > Substitute Management

Club officers/administrators can use this section to view all patrol substitution requests created by members via the Members Area and also create new Substitution requests on behalf of a member.

In the example below the club officer/administrators is requesting to display patrols for “All” Patrol Teams in “All” Patrol Positions where a “Substitution” has been requested between 22/06/2015 – 22/07/2015.

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:

Patrol Position:

Patrols to Display:

First Name:

Last Name:

Date Range: From: To: (dd/mm/yyyy)

In the example below the club officer/administrator has been contacted by Yvette Test advising that she is not able to do her patrol on the 29th June 2015 and can the club create a substitution request.

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:

Patrol Position:

Patrols to Display:

First Name:

Last Name:

Date Range: From: To: (dd/mm/yyyy)

The following screen displays and the club officer/administrator can either select “Add Substitute” if they know the name of a member who is able to do the sub or they can select “Need a Substitute” and this will then display in Members Area for all members to see.

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:

Patrol Position:

Patrols to Display:

First Name:

Last Name:

Date Range: From: To: (dd/mm/yyyy)

Date	Time	Club	Patrol Team	Position	Status	Person Requiring sub	Person/Substitute	Action
29/6/2015	09:00 - 18:00 (09:00 hrs)	Test NSW Club	Team-Test	First Aid Officer	Rostered	Yvette Test		<input type="button" value="Add Substitute"/> <input type="button" value="Need a Substitute"/>

If the club officer/administrator selects the “Add Substitute” option the following screen will display and they will need to enter the details of the member who will do the sub.

Home | Go

Retrieve Patrol Members:

Member ID:

First Name:

Last Name:

Date of Birth: From: To: (dd/mm/yyyy)

Eligible Members only

The screenshot below displays all Substitutions requested for the date range and the status of either “Substituted” or “Requesting Substitute”.

Club Officers/Administrators – can do the following for each status type:-

Substituted – Remove the substitute or Change the substitute.

Requesting Substitute – Add a substitute or Cancel the Substitution Request

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:
 Patrol Position:
 Patrols to Display:

First Name:
 Last Name:
 Date Range: From: To: (dd/mm/yyyy)

Date	Time	Club	Patrol Team	Position	Status	Person Requiring sub	Person/Substitute	Action	
22/6/2015	02:00 - 03:00 (01:00 hrs)	Test NSW Club	Warriors	Member	Substituted	Andrew Hutchinson	Yvette Rutherford	Change Substitute	Remove Substitute
27/6/2015	09:00 - 18:00 (09:00 hrs)	Test NSW Club	Team-Test	IRB Driver	Requesting Substitute	Andrew Hutchinson		Add Substitute	Cancel Substitution Request
22/6/2015	02:00 - 03:00 (01:00 hrs)	Test NSW Club	Warriors	Patrol Captain	Substituted	Cheryl White	Rahul David	Change Substitute	Remove Substitute
23/6/2015	09:00 - 18:00 (09:00 hrs)	Test NSW Club	Team-Test	Patrol Captain	Requesting Substitute	Yvette Rutherford		Add Substitute	Cancel Substitution Request
22/6/2015	02:00 - 03:00 (01:00 hrs)	Test NSW Club	Warriors	Award Member	Requesting Substitute	Yvette Test		Add Substitute	Cancel Substitution Request

6.2 Patrol Logs

✿ Depending on what State you are located in the Patrol Logs section will be managed differently. All States (except VIC & QLD) use the Operations App to manage patrols. The Patrol Log can be updated even if you are using the Operations App.

All States (except VIC & QLD) – Patrol Logs will automatically be Opened and prefilled with data from the Operations App

VIC & QLD – the log will need to be Created and then update with information in the Patrol Logbook

Patrol Dates From: To:
 Log Status: Patrol Name Contains:

Organisation	Date	Beach	Patrol Name	Start Time	Finish Time	Status	Days Open	Actions			
<input type="checkbox"/>	Sun 15/12/2019		Patrol 2	13:15	18:00	Not Created	-	Create Log	Print Log		
<input type="checkbox"/>	Sun 15/12/2019		Patrol 7	08:45	13:30	Not Created	-	Create Log	Print Log		
<input type="checkbox"/>	Sat 14/12/2019		Patrol 5	13:15	18:00	Open	1	Edit Log	Print Log	Stats	Notes
<input type="checkbox"/>	Sat 14/12/2019		Patrol 10	08:45	13:30	Open	1	Edit Log	Print Log	Stats	Notes
<input type="checkbox"/>	Sun 08/12/2019		Patrol 6	13:15	18:00	Open	10	Edit Log	Print Log	Stats	Notes

If you have entered all your patrol teams and rostered patrol times for each team, then an entire list of your patrol logs for your season should be available on this screen.

Use the options and date range to filter your search or display logs from other seasons.

You can print a patrol log in PDF format straight from the patrol log page or alternatively from the patrol roster page.

The printable patrol log will be pre-filled with team member information, date and time information relating to the log.

The statistics and rescue activity fields are also printed in the PDF log.

To enter information into a patrol log use the 'Create' button beside the required patrol log.

The screenshot shows the 'Patrol Log Details' form and the 'Available Members' list. The form includes fields for Patrol Name, Date, Patrol Beach, Patrol Type, Patrol Start Time, and Patrol Finish Time. The Available Members list is on the left, and the main table shows the patrol log details for five positions.

No.	Position	Remove Member	Add Member	Add Visiting Member	Member	Patrol Type	Remove Sub.	Add Sub. Member	Add Sub. Visitor	Substitute	Start Time	Finish Time	Total Time
1	PC	<	Mbr >	Vis >	Boonda, Gammy	Rostered	<	Mbr >	Vis >		22 30	23 00	00:30
2	VC	<	Mbr >	Vis >	Accountie, Test	Rostered	<	Mbr >	Vis >		22 30	23 00	00:30
3	IRBD	<	Mbr >	Vis >			<	Mbr >	Vis >		00 00	00 00	00:00
4	IRBC	<	Mbr >	Vis >			<	Mbr >	Vis >		00 00	00 00	00:00
5	ART	<	Mbr >	Vis >			<	Mbr >	Vis >		00 00	00 00	00:00

To move members into the log you can select from the list of members on the left and use the '>' arrow button.

To move a member out of the patrol log simply use the '<' arrow button.

The list automatically shows all active members for the current season by default. To view all active members regardless of season, you must check the box marked "Include Non-Financial Members"

Each member must be assigned a patrol type and if a substitute was arranged, the substitute must be moved into the substitute column.

To add a visitor to your patrol log from another club, select the 'Add Visitor (with update)' If you have more than 18 members involved in your log, use the 'Next Positions' (with update)' to move to the next page of members. Using both these options will save the patrol log.

6.2.1 Adding a Visitor

To add a visitor to a patrol log you need to edit the log you wish to add the visitor to and click on the Get Visitor button.

ID
15	▼	<	Mbr >	Vis >	▼
16	▼	<	Mbr >	Vis >	▼
17	▼	<	Mbr >	Vis >	▼
18	▼	<	Mbr >	Vis >	▼

Visiting Member

Get Visitor (with Update)

The following screen will open up when you click on the Get Visitor button.

Search for Member

State: ==> Please Select <== ▼

Branch: ==> Please Select <== ▼

Organisation: ==> Please Select <== ▼

Enter either member ID or full name

Member ID:

First Name:

Last Name:

Find Member Clear Cancel

Simply locate the member by selecting the members state, branch and club.

Once this information is selected type in the member's name and click on the Find Member button.

Adding the visiting member into the patrol log

Once the member has been located the visitor will be displayed under the Visiting Member section.

Click on the 'Vis' button to add the visitor into the patrol log.

The screenshot shows a table of members with columns for ID, status, name, and role. A red arrow points to the 'Vis' dropdown menu in the row for member 18. Below the table is a 'Visiting Member' section with a text input field containing 'Sommerfield, Joshua' and a 'Get Visitor (with Update)' button.

6.3 Unpatrolled Stats

A new listing can be added via the 'Add Unpatrolled Stats' button. This will open a new screen, on which you can enter details that pertaining to a certain date. This differs slightly from the Statistics that are entered for specific patrol logs as the unpatrolled stats are details of incidents in which a patrol was not rostered for the time or date. Details include time and number of rescues performed, beach attendance, first aid required, tide information and weather conditions.

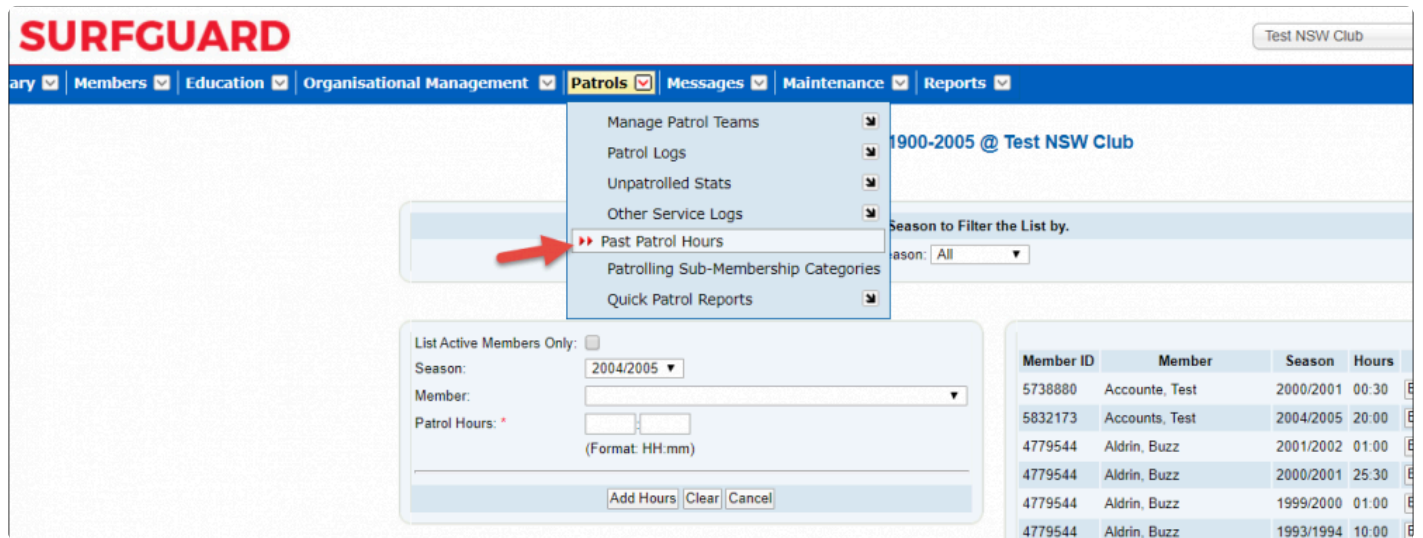
The screenshot shows a detailed form for recording unpatrolled statistics. It is divided into several sections:

- Weather Conditions:** Fields for Start, Mid, and Finish times; Weather; Wind Direction; Wind Strength (kts); Wave Type; Wave Height (m); No. of Rips; Sea Conditions; and Water Temp (°C).
- Ocean Outfalls (please tick):** Checkboxes for Nil, Stormwater, Algae, Jellyfish/Stingers, Seaweed, Floating Debris, Oil Spills, Sewage Pollution, and Other.
- Tide Times:** High and Low tide times for both the current and next day.
- Beach Closed - Reason:** Checkboxes for Dangerous Surf, Sharks, Marine Stingers, Nets Removed, Crocodiles, Pollution, Storms, and Algae.
- Beach Attendance (specify total number of people at each time increment):** A grid with columns for each hour from 01:00 to 23:00 and rows for Swimmers, Swimmers Outside Flags, Craft, On Beach, and Attendance Totals.

6.5 Past Patrol Hours

Member patrol hours gained prior to the start of SurfGuard can be manually added by clubs in the Patrols section.

See screenshot below on how to access this section.



SURFGUARD Test NSW Club

ary Members Education Organisational Management **Patrols** Messages Maintenance Reports

1900-2005 @ Test NSW Club

Season to Filter the List by. Season: All

List Active Members Only:

Season: 2004/2005

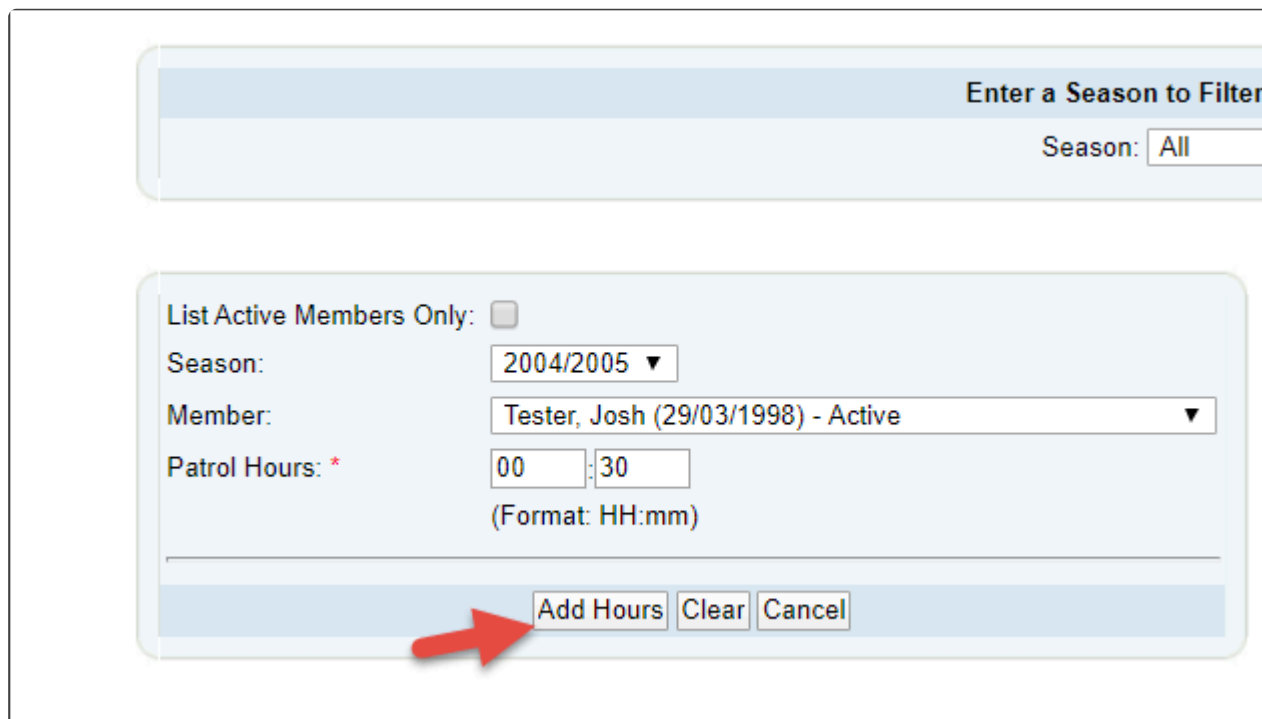
Member: [Dropdown]

Patrol Hours: * [00] : [00] (Format: HH:mm)

Add Hours Clear Cancel

Member ID	Member	Season	Hours
5738880	Accounte, Test	2000/2001	00:30
5832173	Accounts, Test	2004/2005	20:00
4779544	Aldrin, Buzz	2001/2002	01:00
4779544	Aldrin, Buzz	2000/2001	25:30
4779544	Aldrin, Buzz	1999/2000	01:00
4779544	Aldrin, Buzz	1993/1994	10:00

To add patrol hours to a member simply locate the member in the dropdown menu below and type in the number of hours you wish to add.



Enter a Season to Filter

Season: All

List Active Members Only:

Season: 2004/2005

Member: Tester, Josh (29/03/1998) - Active

Patrol Hours: * 00 : 30 (Format: HH:mm)

Add Hours Clear Cancel

6.6 Patrolling Membership Categories

The 'Patrolling Membership Categories' screen is used as a member type filter for the rest of the Patrol module. The member lists that appear in all the screens in the Patrol module (such as the 'Add Members to a Patrol Team' screen and the 'Patrol Log' screen) can be controlled by selecting only the membership

categories you wish to be displayed.

By doing, this you can significantly reduce the number of members that appear in the lists to make a selection of members easier. (This will only delete the Membership Category from your club's list of membership categories of patrolling members.) For example, if you remove 'Junior Activity Member (5-13 years)' and 'Associate' from the list by using the 'delete' link, none of the members in these two membership categories will be displayed in the member lists on all your patrol screens. Add a membership category back into the list by selecting it from the drop-down list and click the 'Add' button

Patrolling Sub-Membership Categories @ Test NSW Club

Sub-Membership Category:

Probationary ▼

Sub-Membership Category	Actions
Probationary	Delete
Junior Activity Member (5-13 years)	Delete
Cadet Member (13-15 years)	Delete
Active (15-18 yrs)	Delete
Active (18yrs and over)	Delete
Award Member	Delete
Reserve Active	Delete
Long Service	Delete
Past Active	Delete
Life Member	Delete
Honorary	Delete

6.2 Managing Patrols Webinar

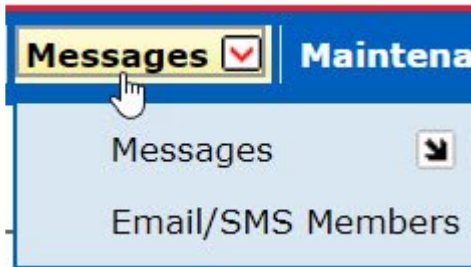
Overview of Managing Patrols within Surfguard and associated systems, presented as a webinar on 7th August 2019.

7. Messages

There are two forms of Message's with Surfguard.

From the Menu tab Messages, you can choose between

1. Messages – a communication tool to contact other Surfguard Users
2. Email/SMS Members – a communication tool to contact your Club/Organisation Members



7.1 Messages

Messaging is used by Administrators of Entities (Clubs, Branches, or States) to send Surfguard related messages using the system itself.

This messaging system may only be used infrequently and is not intended to replace normal email.

There are two sub-menu options under 'Messages'.

1. Messages
2. Create Messages.

Messages

The default Messages screen lists all unread messages; however, you can sort your messages using a number of options, including read, sent, draft, or archived listed in the View Message drop down box.

Once you have read a message

Organisational Management ▾ | Patrols ▾ | **Messages ▾** | Maintenance ▾ | Reports ▾

Messages @ South Maroubra

Create Message View Messages: Unread ▾

Subject	Sender	Date
<input type="checkbox"/> Caves Beach SLSC Ocean Swim - Sat 21st M...	Caves Beach	Sun 08/03/2020 11:28:57
<input type="checkbox"/> Propeller guards for sale	Port Macquarie	Wed 04/03/2020 06:23:02
<input type="checkbox"/> Jim Wall 2020 Iron Event NEW DATE	Torquay	Sat 01/02/2020 14:21:41
<input type="checkbox"/> [none]	Wamberal	Tue 10/12/2019 14:17:20
<input type="checkbox"/> Jim Wall Iron Race January 10	Torquay	Mon 25/11/2019 08:31:18
<input type="checkbox"/> Newport SLSC's 110th Anniversary Celebra...	Newport	Thu 26/09/2019 12:34:12
<input type="checkbox"/> FOR SALE - 2 x Defibrillator Batteries	Kawana Waters	Tue 03/09/2019 11:36:09
<input type="checkbox"/> FOR	Kawana Waters	Tue 03/09/2019 11:32:55
<input type="checkbox"/> South West Rocks SLSC - Wanting 2nd Hand...	South West Rocks	Sat 20/07/2019 10:04:01
<input type="checkbox"/> IRB Achilles for sale - Make us an offer	Broulee Surfers	Sat 01/06/2019 11:49:22
<input type="checkbox"/> Philips FR3 Defibrillator For Sale	Clovelly	Tue 26/03/2019 16:42:35
<input type="checkbox"/> Select All		

Mark as Read | Archive

Create messages

There are two ways to initiate a new message. You can click the 'Create Message' link from the default messages screen or you can click the sub-menu item on the toolbar. The screen that is displayed allows you to select the message recipients from the available list. You can do this by using the add (>) or remove (<) arrows. Once you have composed your message you have the option of sending it or saving it as a draft to be sent at a later time.

Messages @ Test NSW Club

New Message

National:

State:

Branch:

Organisation:

Select Recipient/s:

- Bondi
- Burning Palms
- Coogee (NSW)
- Elouera
- Garie
- North Bondi
- South Maroubra
- Surf Rescue 30 Sydney
- SYD - RWC Group
- Wanda


>
<

Recipient List

- Sydney Branch
- Bondi
- Bronte
- Burning Palms
- Clovelly
- Coogee (NSW)
- Cronulla
- Elouera
- Era
- Garie

Subject:

Message:



[\[Back to Messages \]](#)

View Messages

To view a message, click the message subject. The message will be displayed with the details of the message, including who sent it and who it was sent to.

To view all recipients of the message, click the 'Show Recipients' link.

A message can be forwarded as an email by clicking the "Forward as email" link. This will open the message in your email application with the subject and message content already filled out.

Messages @ Test NSW Club

From:	Test NSW Club
Sent by user:	Joshua Somerfield
Recipient/s:	Show Recipients
Subject:	Test
Date Sent:	Tue 25/06/2019 09:46:14
Status:	Read on Tue 25/06/2019 09:46:18 by Joshua Somerfield
Message:	This is what a message looks like in SurfGuard

[Forward As Email](#)

[\[Back to Messages \]](#)

7.2 Email/SMS

The email/SMS function allows for organisations to extract a list of members and then email/SMS a message to selected people on the list.

This will allow for reminders, information and other updates to be sent directly to people from SurfGuard.

Both the email and SMS messages are sent one way only — replies cannot be received.

For a person to receive email and SMS messages, they must have a valid email address and/or mobile phone number entered in their SurfGuard membership details.

If a person does not wish to receive Email/SMS communication then a checkbox, Do not send SMS and/or Do not Send Email, must be ticked in the persons details in SurfGuard. The check boxes are located at the bottom left-hand side of the members details screen under Other Details.

7.2.1 Sending an Email or SMS Message

To send an Email or SMS Message

1. Select whether an email or SMS is to be sent by selecting Output Format from the dropdown list (Email is the default).
2. Use the filters to select the group of people you wish to email or SMS.
3. Ensure you select the appropriate filters so you only email or SMS the group of people you want.
4. Click Display Report when all appropriate fields have been selected. A new screen will open with the results.
5. Enter the message details such as title and message.
6. Email Attachments: To attach a file to an email, click the 'Add Attachment' button and then click the Browse button and navigate to the file you wish to attach.
7. To add further attachments, click the 'Add Attachments' button again. To remove an attachment click on the Remove button.
8. Agree to the declaration in order to send an email or SMS.
All people searched for are returned whether they have a valid email/mobile number or not, and including those who may have opted not to receive email/SMS communication. This allows you to see those who can be sent a message and those who will not be
9. Select people from the list by ticking their box.
10. When all message recipients are selected, click Send.

Note: You can only attach files of the following types: csv, images, pdf, power point, rich text, spreadsheets, text, word documents, zip/gzip. Total Max File Size (sum of all file sizes) = 1.5Mb%

When sending an SMS, a maximum of 150 recipients may be selected using the SMS function.

A maximum of 140 characters per SMS message is allowed for Latin/ English Character Set encoding (i.e., standard English). A maximum of 30 characters per message is allowed for Universal Character Set (for Non-English characters) encoding.

The message will end in 'powered by telstra'

SMS are for emergencies and recommend using it for Email Functionality.

Email/SMS Members @ Test NSW Club

Message Type: Communicate With Members ▼ **Advanced Search**

Output Format: Email ▼

Enter the following fields to narrow your search:

Member ID:

First Name:

Last Name - From: **To:**

Gender: All Male Female Indeterminate

Registered Season: eg. 2012 = registered season 2012/2013

Display Report **Clear**

To filter by different fields simply hit the 'Advanced Search' button

Message:

Message Title: *

Font Size... B I U

Test

Message: *

Attachments:

Form 75.pdf (Max 1.5Mb per file)

Total Max File Size (sum of all file sizes): 1.5 Mb

Allowed Attachments: csv, images, pdf, power point, rich text, spreadsheets, text, word documents, zip/gzip

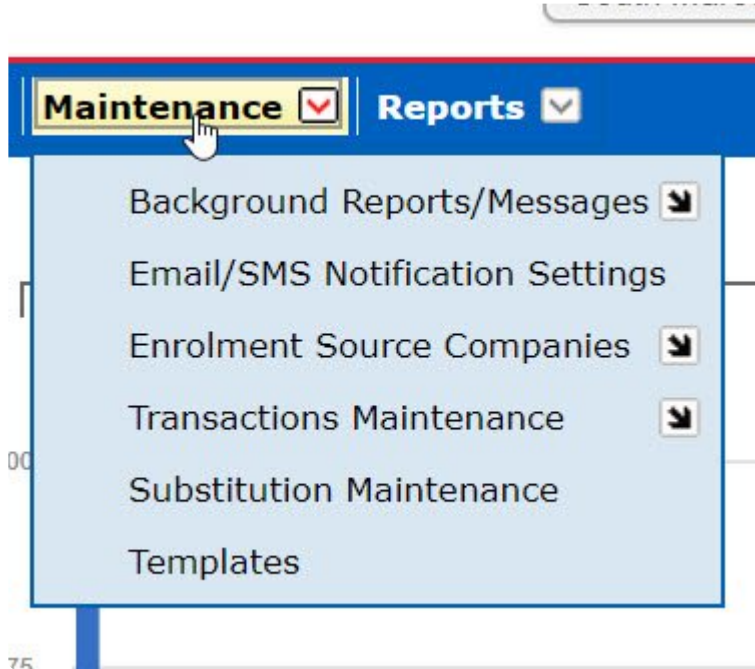
Declaration:*

I will only send messages to people who have consented to receive them and I am complying with all SLSA policies and with all relevant legislation.

Once you have typed your message & attached any documents you will need to check the declaration to send your message

8. Maintenance

Under the Maintenance tab, Club level users can access the sub-menus shown below:



8.1 Background Reports/Messages

Scheduled Background Reports

Users can set up a series of scheduled reports specifically for your Club or Organisation that will be automatically created and emailed to a user.

This screen will display any such scheduled reports set up by your club.

Click on the View, Edit or Delete Option buttons to make changes to a scheduled report.

Once a report has been scheduled, the report type and selection criteria cannot be changed. Only the parameters that affect the actual scheduling of the report can be changed (such as who will receive it, when it is run and how often, etc.)

Scheduled Background Reports/Messages View @ Test NSW Club

Report Type: Report:

Output Format: Enabled:

Scheduled Run Date - From: (dd/mm/yyyy) Scheduled Run Date - To: (dd/mm/yyyy)

Report Type	Report Name	Output Format	Recurring Type	Recurring Interval	Scheduled Date/Time	Enabled	No. of Email/SMS Recipients	Options
Custom Reports	Test Report	CSV Style (Excel Format)	Non-recurring		Wed 29/06/2016 13:15:00	No	1	<input type="button" value="View"/>

Messages

Through this screen Users are able to view all their emails and/or SEMS sent to their members.

To view, for example, all Email Messages sent by your club surfguard users following these instructions:

1. From the Maintenance Menu Tab – select Background Report/Messages – Scheduled Background Report/Messages
2. Report Type: Messages
3. Output Format to: Email (or if you wish to see SMS message sent then choose this)
4. Report to: Communicate with Members
5. Enabled to: All
6. Click the GO button

Scheduled Background Reports/Messages View @ South Maroubra

Report Type: Report:

Output Format: Enabled:

Scheduled Run Date - From: (dd/mm/yyyy) Scheduled Run Date - To: (dd/mm/yyyy)

You can click on the column header ie: **Scheduled Date/Time** to bring the most recent date to the top of the report.

The screen will list all Email communication messages sent from your club.

If you click on the **View** option button this will display the details of the message emailed, who sent the email and so forth.

8.2 Email/SMS Notification Settings

Email notifications allow clubs to be sent notification emails when certain events take place or areas of

Surfguard are updated.

Anything that has been changed in Surfguard (such as status updates and new items requiring action) within the modules available will be sent in an email. This is a great way for Officers of your Organisation to be alerted of re-opened patrol logs, approved assessments, transfers requiring action, members licenses expiring etc.

Simply go to the Email/SMS Notification Settings from the Maintenance menu drop down box. Clicking on the 'edit' button, clubs can add a number of email address to receive email notifications from surfguard.

When adding more than one email address use a comma with no space ie:

test@slsa.asn.au,beach@slsa.asn.au,surf@slsa.asn.au

Email/SMS Notification Settings @ Test NSW Club

Email Notification Settings

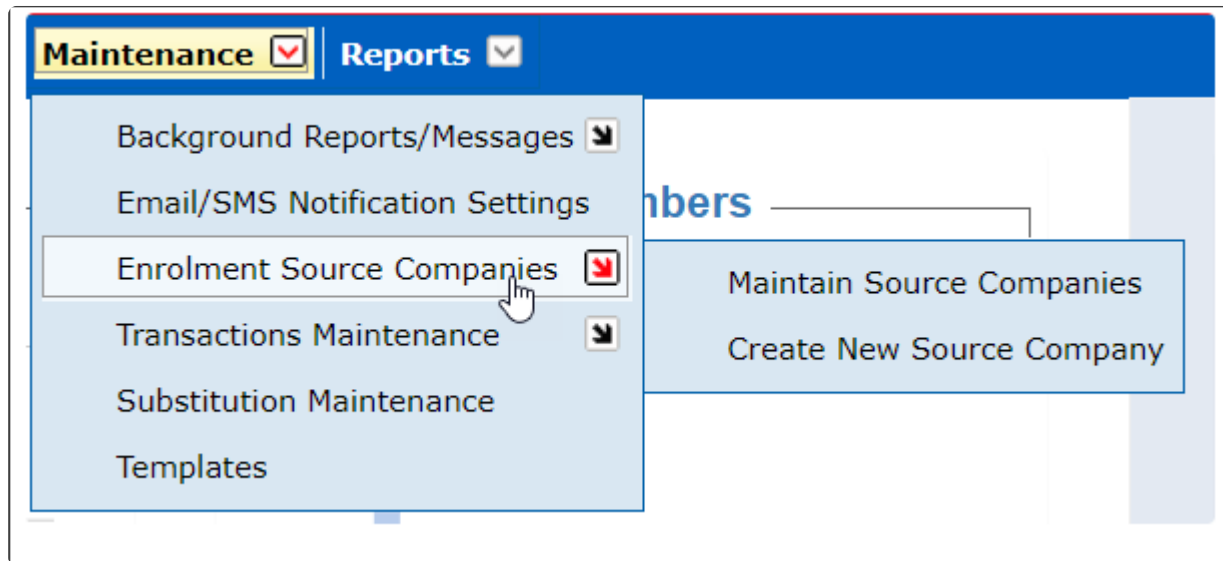
Notifications	Subscribed	Email Address(es)
Assessments	[x]	test@slsa.asn.au, surf@slsa.asn.au
Expiring Member Licenses	[x]	test@slsa.asn.au
Expiring Member Protections	[x]	test@slsa.asn.au
Messages	[]	
New Memberships - Linked Systems	[x]	beach@slsa.asn.au, surf@slsa.asn.au
Patrol Log Requests	[x]	test@slsa.asn.au
Pending Member Requests	[x]	beach@slsa.asn.au
Transfers	[x]	surf@slsa.asn.au

8.3 Enrolment Source Companies

Source Companies are those entities that describe where a member or course registrant comes from. To update source company information, select the 'Maintain Source Companies' option from the menu.

Users are given two choices:

1. Maintain Source Companies
2. Create New Source Company



Maintain Source Companies lists all Source Companies created in the system. You can only delete Source Companies that are not in use by other users.

In the Add Source Company space fill in the compulsory fields to create a new Source Company

8.4 Transactions Maintenance

Transaction types can be added to the already default available list.

To add new transaction types, select “New Transaction Type” while in the transaction maintenance screen. It’s important to remember that you cannot delete a transaction type once members have transactions linked to it.

Patrols | Messages | **Maintenance** | Reports

View Transaction Types @ South Maroubra

Transaction Type Name	Options
Presentation Night 2019	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
60th Anniversary Ball Tickets	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Carnival entry fee	
Club key	
Course fee	
Donation	
Function	
Gym fee	
Invoice	
Joining Fee	
Levy	
Locker key	
Membership fee	
Merchandise	
Non fee paying member	
Other	
Special Event	
Training material/manuals	

8.5 Substitution Maintenance

It is within the Maintenance – Substitution Maintenance screen that users/Clubs can set rules/timelines that apply to how notifications are sent and updated to users of the patrol sub functions in the Members Area. By clicking on the Edit option, Users/Clubs can adjust the time period (value) or who in a patrol receives substitution notifications.

Substitution Maintenance @ South Maroubra			
Substitution Parameter	Description	Value	Options
Future patrols - Hours prior	Defines the period prior to the patrol starting where a substitute request can no longer be created.	72	<input type="button" value="Edit"/>
Deselect Substitution - Hours Prior	Defines the period prior to the patrol starting where a confirmed substitute can no longer cancel the patrol substitution.	72	<input type="button" value="Edit"/>
Patrol Not Taken - Hours Prior	Defines the period prior to the patrol starting whereby all unaccepted substitution requests will be cancelled and an email sent to notify the member who created the request.	72	<input type="button" value="Edit"/>
Patrol Not Taken - Notification	Enable or Disable the email notification that is sent when a substitution request has not been accepted by anyone.	Yes	<input type="button" value="Edit"/>
Patrol Taken - Notification	Enable or Disable the email notification that is sent when a substitution request is confirmed.	Yes	<input type="button" value="Edit"/>
Patrol Taken - Positions Notified	Defines the Positions on the patrol team that will be notified when a substitution request is confirmed.	Patrol Captain Vice Captain	<input type="button" value="Edit"/>
Upcoming Patrol - Hours Prior	Defines the period prior to the patrol starting where nominated positions are emailed a list of Patrol Members for the upcoming patrol.	72	<input type="button" value="Edit"/>
Upcoming Patrol - Positions Notified	Defines the Positions on the patrol team that will be emailed a list of Patrol Members for the upcoming patrol.	Patrol Captain	<input type="button" value="Edit"/>
Upcoming Patrols - Email/SMS - Days	Defines the number of days prior to the patrol starting where the rostered patrol will appear in the 'Filter by Patrol Team Fields' area within 'Email/SMS members'.	7	<input type="button" value="Edit"/>
Eligible Members Only	Defines whether club administrators are able to select from eligible members only while using Surfguard to manage substitutions.	No	<input type="button" value="Edit"/>

Example:

Patrol Taken Notification

If the Patrol Taken Notification value is enabled (Value is YES) then when a person accepts a patrol substitution (within the Members Area – patrol section) the patrolling member applying for the sub will receive an email notification that another club member is doing the sub for them.

8.6 Templates

There are two default templates in Surfguard: **Membership Details and Membership Renewal Form** that are accessible for viewing or editing via the Maintenance-Templates screen.

When club officers use the option of emailing out either Membership Details or Membership Renewal Forms they can choose to include the appropriate Template cover letter.

To email Membership Renewal Forms from Surfguard including the template Cover Letter: Go to Reports > General Reports > Member Reports and make the following selections.

Report Type: Membership Renewal Form

Output Format: PDF

Click 'Advanced Search' button and make the following selections

Renewal Season: Select 2020/21

Status: Active

Registered Season: 2020

Email to Members: tick the box and the Declaration box that then appears

Print Cover Letter: Yes

****Note: *** When you select Yes to Print Cover Letter template option will appear. You can make changes to the template on the screen but any changes made will not be saved.

To keep changes made to a template then use the Maintenance/ Templates menu for full edit functionality and to save the new format of the template.*

Print Declaration: Yes

Print Membership Details: No

Display Report Here box

Surfguard will then produce a report advising which members have been emailed their pre-filled membership forms and provide you with pre-filled membership forms for those without email addresses in Surfguard.

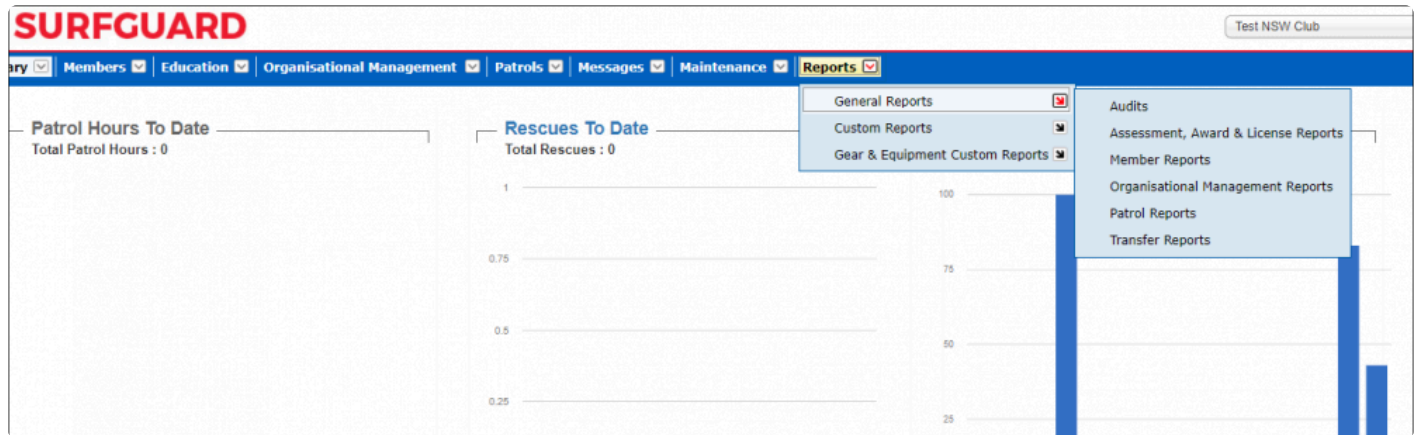
Note: If electronically sending or printing forms for all your members, it is important to break the output up into a number of groups based on age/ name/ Membership category.

Because this report can be large, printing all members at once may fail. We suggest that you print one output for all members with last names starting from 'a' to 'c', then another output of members from 'd' to 'f', etc.

9. Reports

9.1 General Reports

Click on Reports > General Reports



General Reports: Overview

Report Category	Report Name	Description
Audit	Audit	Reports on audit trail and summary of changes made to Patrol logs and Member DOB's over a set period of time.
Assessment, Awards and License	Assessments Eligibility	Description Reports on who in your organisation is eligible to commence training for a specific award
	Assessments	Provides a report on who in your organisation sat for an assessment over a specific period of time. Includes awards and proficiencies
	Assessors	Provides a report on who in your organisation acted in the capacity of an Assessor over a specific period of time for a specific award
	Assessor Activity History	A report that lists your organisations Assessors Activity History
	Awards History	Gives you a report on members or an individual member within your organisation on their award history. This report can be filtered by award, date, membership type, proficiency, registered season & person
	Current	Report that outputs a list of members that have a specific award. Report can be

	Awards	filtered by Award, person, registered season, award date
	Reference: Awards	A report that details the criteria for a specific award including award pre-requisite conditions for candidates, assessor and trainers.
	Reference: Licenses	A report that details what licenses are required for a specific award.
	Totals By Assessment Date	Gives a break down, by month and by award, of your organisations total numbers for Assessments and their subsequent award status.
	Trainers	Provides a report on who in your organisation acted in the capacity of a Trainer over a specific period of time for a specific award
	Trainers Activity History	A report that lists your organisations trainers Activity History
Member	Competition Age Category	Lists members current competition age category within a specific registered season. Report can be filtered by membership category, gender, age
	Contact Details	Provides a comprehensive report on members contact details which can be filtered by groups, officer, gender, registered season, registration date and membership type.
	Email Lists	A list of members email addresses
	Family Groups	This report is for Clubs to determine the Number of Family Groups that have been created within the Club, Members who have a Family Group, Primary and Standard Members of each Family Group and Contact Information.
	Mailing Labels – Members	Provides the function to grab member information to create mailing labels. System is set up to use Avery L7160 labels or you can output information into excel format to create your own labels
	Members Portal Accounts	This report is for Clubs to determine if Members do or do not have a Members Portal Account. Report also details members Account Usernames and when Portal accounts were created and last used.
	Membership Details	A report that details a members details including a list of awards, contact information, emergency contact details, ID verification, Member Protection status
	Membership History	Provides a list of dates for when a members membership record was updated including registered seasons, membership categories and competition rights.
	Membership Protection Details	This report is for Clubs to determine who is up to date with their Member Protection and who is required to update their Members Protections (WWCC).
	Membership Renewal Form	This report is for Clubs to print out or email prefilled Membership Renewal Forms to Members.

	Nipper Attendance Sheet Template	A list of members, that can be determined by competition age category, membership type, registered season, gender. Can be exported into excel format to be used as a nipper attendance sheet.
	Pending Member Requests	Provides a club with a list of all transactions that have passed through the pending member request function. Report can be filtered by Pending Member Request status i.e: completed, pending, rejected for a specific date period.
	Reference: Occupations	A list of members occupations
	Transactions	A list of members transactions for a specific period of time. Can be filtered by a particular transaction type, date period or payment method
Organisational Management Reports	Gear and Equipment	Lists all (or selected) organisation equipment, detailing equipment information such as make, date of purchase, gear inspection dates, registration numbers.
	Gear and Equipment Totals	An equipment list containing total numbers of inventory for each type of equipment
	Officers Club/ Organisation	List of club officers that can be filtered by date, registered season, position, person. List also contains Officers contact information
	Organisation details	Details an organisations address, contact information, GPS location, bank account information, RTO info (if applicable),
	SMS totals	Provides a total of SMS sent to members over a specific date period or registered season
	Service Profiles	A report that details when an organisation is providing a lifesaving service including, dates, days & times and a description on where an organisation provides such services ie: location
	Users	This report is for Clubs to determine who has Active access to Surfguard. You can also check who has previously had access and is now inactive.
Patrol Reports	Member Patrol History	This report will provide a list of a members Full Patrolling History, Note: Surfguard only begun in 2004 and any Patrol Hours prior to this date will not display in this report unless they have been manually added by an organisation. Patrol History prior to surfguard will need to be obtain from previous Annual Report and Patrol Logs.
	Member Patrol Summary	Can provide a report on an individual, whole patrol or all members total patrol hours for a particular season/s broken down into Lifesaving and/or competition seasons
	Patrol Attendance: 100%	Provides a list of patrolling members who have completed 100% of their own rostered patrols during a season
	Patrol Deficit	A report that details patrolling members who are in arrears of their rostered

	Hours	patrolling duties for a specified period of time or season
	Patrol Log/ Service Profile Comparison	Details all patrol logs (in weekly increments) and their current status in relation to logs being completed.
	Patrol Rosters	A report that can list all patrols or individual patrols team members and their seasons roster (including patrol teams contact details optional)
	Patrol Service	Details an organisations patrol service history including Beach Attendance and Activity, Prevention Actions, First Aids with last year comparisons. Report can be filtered using monthly or weekly breakdowns
	Patrol Team Member Qualifications	Lists members in a rostered team together with their patrol position and award qualification status, contact information is optional
	Patrol Team Member Qualifications and Roster	A report by Patrol that lists all patrolling team members, their patrol position and their award and proficiency details, (Contact email and mobile information optional) and their rostered patrol dates and start/finish times.
	Patrol Type Hours	Details patrolling members patrol service for a specific date/season period including a breakdown of each of their rostered patrols with the members start and finish time, patrol type ie: rostered, no shows, arranged substitutes and hours
	Patrolled and/or Unpatrolled Stats	A full report of all patrolling stats including # of rescues, beach attendance, first aids performed, patrol weather conditions, preventative actions
	Patrolled and/or Unpatrolled Stats – Attendances	Extracts information from the Patrol logs to display total beach attendance numbers
	Patrolled and/or Unpatrolled Stats – First Aid	Reports total number of first aids performed over a specific period of time (includes day by day breakdown)
	Patrolled and/or Unpatrolled Stats – First Aid Analysis	Specific report on any first aid incidents involving ambulance, Methoxyflurane usage
	Patrolled and/or Unpatrolled	Extracts information from patrol logs to display each patrolling days Prevention Action statistics with an accumulative total

	Stats – Preventions	
	Patrolled and/or Unpatrolled Stats – Rescues	Extracts information from patrol logs to display total number of rescues with a breakdown for specific date range & rescue periods.
	Patrolled and/or Unpatrolled Stats Comparison	An organisations patrol stats with comparison flexibility by month, years for a number of patrolling data including first aid, attendance, Preventatives, rescue types
	Substitution Statistics	Lists all patrolling members together with any substitutions that have been performed and make up. Ie: patrols given upo and patrols accepted
	Total Member Patrol Hours	A detailed report of all patrolling members total patrol hours performed in a specific season including a breakdown for rostered hours, patrol rostered hours completed, substitute, volunteer, water safety. (report can be filtered for individuals a registered season, membership type
	Total Team Patrol Hours	A report that gives a patrol by patrol breakdown of each teams total patrolling hours and the make up of these hours.
Transfer Reports	Transferred Out Members	Members that transferred out of the organisation
	Transfers	A report that details all transfers, both in and out of an organisation. Includes transfer type, winning/ losing club and the transfer approval process
	Transfers History	Breaks down per member the transfer history, transfer type and status for a given period/season

Report Scheduling

To run reports at a specified time or on a regular basis a feature is available that allows scheduling of both standard reports and custom reports. Reports can either be run once at a scheduled time or can be reoccurring.

The results of each scheduled report can be emailed and/or sent via Surfguard messaging to you rather than having to export/view them from within Surfguard.

This feature appears at the bottom of both General Reports and Custom Reports screens.

Enter the mode of delivery:

Display Report Here:

Send Report Via Surfguard Message:

Send Report Via Email: Send to Email:
Enter multiple email addresses separated with commas. Do not include blank email addresses.

Recurring Type: Recurring Interval: eg. Weekly Recurring Interval of 2 = report to run once every 2 weeks.

Scheduled Date: (dd/mm/yyyy) Time (24hr):
Leave scheduled date/time blank to schedule immediately.

9.2 Custom Reports

Creating a new Custom Report

To create a new custom report, select Reports > Custom Reports > New Custom Reports

The screenshot shows the 'Reports' menu with options: General Reports, Custom Reports, and Gear & Equipment Custom Reports. The 'Custom Reports' option is selected, leading to a sub-menu with 'Custom Reports' and 'New Custom Report'.

Below the menu, a report configuration table is visible. The table has two columns: a blue column for selecting output fields and a green column for selecting criteria. The table shows 'Rescues To Date' with 'Total Rescues : 0'. A bar chart shows a value of 100 for the top row and 75 for the bottom row.

Output Fields (Blue Column)	Selection Criteria (Green Column)
Rescues To Date	100
Total Rescues : 0	75

To create a custom report, select the output fields that you wish to see in your report by clicking the applicable check-box on the left (blue column). A tick will appear, indicating your selection. The right side of the report (green column) is used to determine your selection criteria. You can also select the display type and the desired document set-up

For example, to create a report to see the first name, last name and age of all male members with the occupation of Student. Add a tick beside the first name, last name, and age on the left, and select gender as Male and occupation as Student on the right. Click 'Display Report' at the bottom.

Report Title:

Select All Columns Un-Select All Columns Show All Sections Hide All Sections

Include Column?	Sort Order (not column order)	Column Header	Selection Criteria
<input type="checkbox"/> General Details			Hide General Details
<input checked="" type="checkbox"/>		Member ID:	Member ID: <input type="text"/>
<input type="checkbox"/>		Title:	Title: <input type="text"/>
<input checked="" type="checkbox"/>		First Name:	First Name: <input type="text"/>
<input type="checkbox"/>		Middle Name:	Middle Name: <input type="text"/>
<input checked="" type="checkbox"/>		Last Name:	Last Name - From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>		Preferred Name:	Preferred Name: <input type="text"/>
<input checked="" type="checkbox"/>		Gender:	Gender: <input type="radio"/> All <input checked="" type="radio"/> Male <input type="radio"/> Female
<input type="checkbox"/>		Date of Birth:	Date of Birth - From: <input type="text"/> To: <input type="text"/> (dd/mm/yyyy)
<input checked="" type="checkbox"/>		Age:	Age - From: 18- To: 21
<input checked="" type="checkbox"/>		Occupation:	Occupation: <input type="text" value="Student"/>

Display Type: HTML Downloadable CSV (Excel Format) Delimited Text File

Records Per Page: Delimiter: or Tab:

Create Template:

Clear Display Report Cancel

Saving a Custom Report as an XML file

To save a Custom Report as an XML file you will need to run the report and then save the template file to your computer.

Note: The Display Type needs to be selected as CSV to see this screen to save your report.

Custom Reports @ Test NSW Club

Template:
[Please right mouse click here to save the template file.](#) Then, select **Save Target As** to save the template anywhere on your computer. Please use .xml as your file extension.

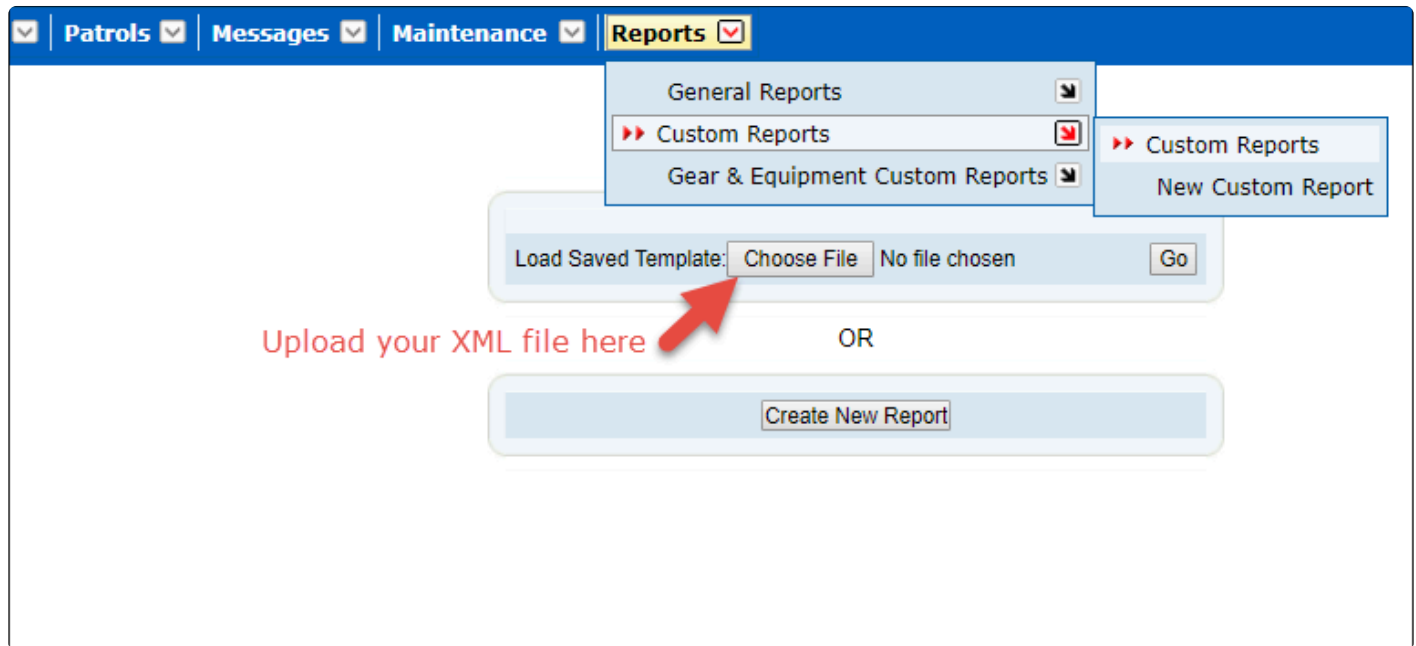
Selection Criteria:
 Status = Active; Registered Season = 2019.

Total Records:
 293

Please click here to download result file

Uploading your Custom Report XML file to SurfGuard

Once you have saved your report you can simply upload the XML file to SurfGuard.



9.3 Gear and Equipment Custom Reports

Gear and Equipment reports work in the same way as the custom reports. This area is used to report on all aspects of a Club, Branch or State's gear and equipment recorded in SurfGuard.

To create a new Gear and Equipment custom report, follow the same procedure as described in **Creating a new Custom Report**.

When your report is output to the screen, a link will be provided to save the report for opening at a later date. You can also sort the report on each column by clicking the relevant column header. This report also has the ability to filter by specific Gear and Equipment types.

9.4 Report Examples

9.4.1 Member Reports – examples

REPORT – Who is NOT REGISTERED for the current season

Go to New Custom Report

Tick on LHS – Member ID, First Name & Last Name (from within the General Details section) and the

following below from within the Organisation Membership details section

Organisation Membership Details

Hide Organisation Membership Detail

Membership Type:

 Date Joined:

 Date Archived:

 Is Archived in All Organisations:

 Status:

 Registered for Season:

Membership Type:

Probationary
 Junior Activity Member (5-13 years)
 Cadet Member (13-15 years)
 Active (15-18 yrs)
 Active (18yrs and over)
 Award Member
 Reserve Active
 Long Service
 Past Active

Use the Ctrl or the Shift key to select multiple membership types.

Date Joined - From: (dd/mm/yyyy)
Date Archived - From: (dd/mm/yyyy)
Is Archived in All Organisations: **

**** Please be especially careful when using the Is Archived in All Organisations. Your report may fail due to the processing that is required by this field. If you do require it, please filter your selection so a small data set is retrieved.**

Status:

 Registered for Season:

Status:

Active
 Archived
 Deceased
 Expelled
 Suspended

Registered for Season: OR Not Registered for Current Season:

eg. 2010 = registered season 2010/2011.

REPORT: FIND OUT ACTIVE MEMBERS FOR THE 2019/20 SEASON THAT EITHER DON'T HOLD A BM OR SRC AWARD OR THEIR PROFICIENCY HAS EXPIRED

General Details: Tick LHS: Member ID, First Name, Last Name & Age

Membership Type: Tick LHS and Active (15-18yrs) and Active (18yrs & over)

Status: Tick LHS and Highlight Active

Registered for Season: Tick LHS and put in 2019

Award Name: Tick LHS

Award Expiry Date: Tick LHS

Display the Report.

Use the template first to generate the Report for Bronze Once you generate the report if you scroll to the bottom you will see that there are Active members who hold no Awards. I have copied and pasted these into the 2nd tab of the spreadsheet. We then sorted the spreadsheet by Awards and Expiry date. You can then scroll down and find the Bronze members who have expired proficiency. I have copied these members into the 3rd tab. Then sorted the 2 extra tabs (No Awards & Expired BM) by the club.

To find Active members for the 2019/2020 season that either has no SRC or expired SRC change the Membership Type to Cadet Member

REPORT: EMAIL ADDRESS FOR MEMBER/S

Reports – General Reports – Member Reports

Report Type: Email Lists

Report Output: CSV Style

REPORT – EMAIL ADDRESS FOR MEMBERS TO PUT IN OUTLOOK

Why Do It: Get emails to send out in Outlook to see if they bounce back

General Reports – Member Reports

Report Type: Email Lists

Output: Semi Colon Delimited (Text Format)

Display Report

Copy & Paste into outlook email.

You will then see what emails bounce back

REPORT – CLUB WANTING TO KNOW HOW MANY MEMBERS THEY HAD IN A PREVIOUS SEASON**Option 1**

Reports – General Reports – Member Reports

Report Type – Membership History

Report Output: CSV

Season: put in date you are checking for

You will get the number of members for the season listed at top and also name of each member.

Option 2

If you just want total numbers for each Sub-Membership Category for a specific season you can also go to the Summary Tab

Summary Tab

Display: Sub-Membership Categories

Season: Type in the season you want stats for

You will then be given a list of members in each Membership Category. If you click on the Membership Category you will then be given a list of members in that category

REPORT: FIND OUT WHO DOES AND DOESN'T HAVE A MEMBERS AREA ONLINE ACCOUNT

Go to Reports > General Reports > Member Reports

Report Type: Member Area Accounts

%(color-red)*REPORT – FIND OUT MEMBERS WHO HAVE RENEWED VIA MEMBERS AREA* %

(Can Be Generated For Club, Branch, State Etc)

Reports > General Reports > Member Reports

Report Type: Pending Member Requests

Output Format: CSV Style

Click “Advanced Search”

Leave Branch & Organisation as “All”

Organisation Type: Highlight SLS Organisations, Support Operations, Other SLS Organisations

Pending Member Request Type: Highlight “Renew Club Membership”

Pending Members Request Date: 01/07/2019 – 30/06/2020 (for second report change to 01/07/2019-30/06/2020)

Display Report

When you have it in Excel format you may want to De-duplicate by Member ID & Organisation.

REPORT – LIST ALL AWARDS HELD BY EACH MEMBER OF A PATROL TEAM

Reports – Custom Report – New Custom Report

General Details: First Name & Last Name

Organisation Membership Details: Active & fill in Registered for...

Awards: Tick Award Name on LHS only

Patrol Rosters: Tick Rostered Team Name on LHS and also Patrol Roster Date (you will need to go to the Patrol Roster for a specific date for a specific team.

REPORT – SENDING OUT MEMBERSHIP RENEWALS

The first step is to amend the ‘Cover Letter’ Template to ensure it has all the information your members need to renew their membership eg. preferred renewal method; club contact details; club fees, etc. Go to Maintenance > Templates > Edit Membership Renewal Form. Amend and save this template. Then:

- Go to ‘Reports’ > ‘General Reports’ > ‘Member Reports’.
- Click on ‘Advanced Search’
- Report Type = ‘Membership Renewal Form’
- Output Format = PDF

- Renewal Season = 2020
- Status = 'Active'/'
- Registered Season = 2019
- Tick the 'Email to Members' box
- Tick the 'Declaration' box
- Print Cover Letter: 'Yes'
- Print Declaration: 'Yes'
- Print Membership Details: 'No'
- Tick the Display Report Here box.
- Display Report.

Surfguard will then produce a report of members that have been emailed their pre-filled membership form and provide you with pre-filled forms for those without email addresses.

REPORT – SHOW WHO DOESN'T HAVE OR HAS EXPIRED MEMBER PROTECTION

Reports – Custom Reports – New Custom Report

Once report is created you can save a Template of the report for future use.

General Details:

Member ID – Tick LHS only

First Name – Tick LHS only

Last Name – Tick LHS only

Age – put in 18-99

Phone

Mobile – Tick LHS only

Email

Email address 1 – Tick LHS only

Organisation Membership Details

Status – Tick LHS & Active in Green section

Registered for season – Tick LHS and date for current season in Green section

Pick Membership Categories it is relevant to.

State Based Details

Tick all boxes on LHS except for Student Number

REPORT – CHILD PROTECTION DETAILS & PATROL TEAM

Reports – Custom Reports – New Custom Report

Once report is created you can save a Template of the report for future use.

General Details: Member ID – Tick LHS only

First Name – Tick LHS only

Last Name – Tick LHS only

Age – put in 18-99

Phone

Mobile – Tick LHS only

Email

Email address 1 – Tick LHS only

Organisation Membership Details Status – Tick LHS & Active in Green section

Registered for season – Tick LHS and date for current season in Green section

Pick Membership Categories it is relevant to.

State-Based Details

Tick all boxes on LHS except for Student Number

Patrol Rosters

Rostered Team Name – Tick LHS only

Patrol Roster Date – Tick LHS only

Display Type: CSV (Excel)

Display Report

Once in Excel De-Duplicate by Member ID

REPORT – FIND OUT MEMBERS WHO HAVE RENEWED VIA MEMBERS AREA

(Can Be Generated For Club, Branch, State Etc)

Reports > General Reports > Member Reports

Report Type: Pending Member Requests

Output Format: CSV Style

Click “Advanced Search”

Leave Branch & Organisation as “All”

Organisation Type: Highlight SLS Organisations, Support Operations, Other SLS Organisations

Pending Member Request Type: Highlight “Renew Club Membership”

Pending Members Request Date: 01/07/2019 – 30/06/2020 (for second report change to 01/07/2012-30/06/2013)

Display Report

When you have it in Excel format you may want to De-duplicate by Member ID & Organisation.

REPORT – FIND OUT WHO HAS PAID THEIR GYM FEES VIA PAYMENT GATEWAY

Reports – General Reports – Member Reports

Report Type – Transactions

Click on Advanced Search

Transaction Type – Gym

Transaction Payment Method – Credit Card

Date range – default for dates of current season

Display Report

Note: Transaction No. & Payer Name come over from the Members Area

BRANCH NEED TO RUN A REPORT ON ALL U13'S FROM EACH CLUB REGISTERED FOR 2020

To create report:-

Reports – General Reports

Report Type: Membership History

Organisation: need to do for each individual organisation

Age: 12 to 14

Status: Active

Registration Date: 01/07/2019 to 31/03/2020

Download report.

Highlight Column A and then under Data tab click Remove columns not required.

Then sort by Date of Birth.

Looking for DOB between 01/10/1999 to 30/09/2000

REPORT – MEMBER ATTRITION / HOW MANY MEMBERS HAVE LEFT/NOT RETURNED

Reports – General Reports – Member History

Advanced Search

Age 14 – 99 (if desired)

Status: Archived / Deceased / Transferred Out

Membership Type: Active (15-18) / Active (18 and over)

Membership Date: last five years

Go.

Note the CSV/Excel version of this report is horrible. If you need it, best bet is to select the table and sort by member id. You lose some relevant data because the records are not flat but there isn't much else you can do with it in it's current format.

9.4.2 Assessment Reports – examples

REPORT: STATE OFFICE FINDING OUT HOW MANY OF A SPECIFIC AWARD HAVE BEEN ALLOCATED IN A SEASON AND HOW MANY PROFICIENCIES ARE DONE

To generate a report for the information you need you can do the following

Reports > General Reports > Assessment, Awards & License Reports

Award Type: Current Awards

Output Format: CSV Style (Excel Format)

Branch: All

Organisation: All

Awards: You can either do them 1 by 1 or select the different award types

Award Allocation (Processed) Date – From: 01/07/2019 to 11/02/2020

Display Report: once you have the report in Excel you can then do sub-totals by Organisation.

Proficiencies: you would run the same report but instead of Award Allocation date you would fill in the Proficiency Allocation Date.

You can then do sub-totals for each club when in Excel

- Club level*** – If doing this same report for a club you would sort by Award Date and NOT Award Allocation date.

REPORT: WHO IS PROFICIENT FOR CURRENT SEASON FOR AN AWARD

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Current Awards

Status: Active

Award Type: All

Award: Choose the Award

Award Expiry Date – From: enter dates as required depending on the search

REPORT: HISTORICAL ASSESSMENT REPORT

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Awards History

Award Type: All

Award: Choose the Award

Either:

1. Award Date From: Awards given for date range
2. Proficiency Date: Proficiency given for a specific Date Range

REPORT –CHECK REQUIREMENTS OF THE AWARD FOR CANDIDATE, TRAINER & ASSESSOR

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Reference: Awards

Award: Choose the Award

Display Report

REPORT – BRANCH TRYING TO FIND OUT WHERE A MEMBER HAS DONE AN AWARD OR PROFICIENCY

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Assessments

Report Output: CSV

Organisation: All

Put in First & Last Name of Candidate

Award Type: All

Award: find the award

Assessment Date: When you run the Assessment Report it is sometime a good idea to put in a large date range in the Assessment Date, eg 01/01/2002 to 01/01/2025. Just in case someone has entered an incorrect date.

Display Report

REPORT: TO FIND OUT WHO IS NOT PROFICIENT IN NIPPER PROFICIENCIES FOR CURRENT SEASON (CAN BE USED FOR OTHER PROFICIENCIES)

Open General Details: First Name & Last Name

Open Organisation Membership Details

Put In: Member Type, Active, Season eg 2019 and Age Category if a Nipper Report

Open Awards

Tick LHS box for "Awards" but don't highlight any award type.

Tick LHS boxes "Award Date" & "Proficiency Date" & Award Expiry Date

Download Report in CSV

Once in Excel sort by Award column

Remove any unnecessary Awards in the Award Column

Change back to sort by surname

There will be gaps next to names of people who don't have proficiencies

REPORT: LIST OF AWARDS GAINED IN A SEASON

Note: This report will show Awards gained by members at any Originating Organisation.

Go to Reports > General Reports > Assessment, Awards & License Reports

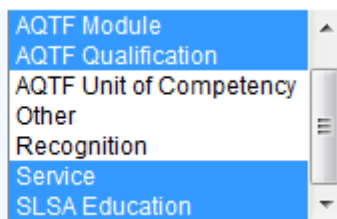
Report Type: Current Awards

Output Format: CSV Style (Excel Format)

Status: Active

Registered Season: Leave blank

Award Type:



This can be changed depending on the needs of the club, you can display all Award Types if required including all Units of Competency.

Award Date: 01/07/2012 – 30/06/2013

Display Report

Once in Excel get rid of all columns not required.

Sort by Award Name.

If you want to get a total of each Award then do a Sub-total based on change of Award Name and do a count.

REPORT: CLUB WANTS TO FIND OUT WHO IS ELIGIBLE/QUALIFIES TO BE RAISED IN AN ASSESSMENT FOR AN AWARD

Go to Reports > General Reports > Assessment, Awards & License Reports

Report Type: Assessment Eligibility

REPORT – CAN'T ADD A MEMBER TO A NEW ASSESSMENT REQUEST IT SAYS THEY ARE

ALREADY IN AN ASSESSMENT

Go to General Reports – Assessments, Awards & License Reports

Report Type: Assessments

If searching from SLSA or a state level, and you don't know where the assessment occurred, set Branch and Organisation to "ALL"

Put in Member ID or First & Last Name

Don't choose any specific award

Extend assessment dates – eg 01/07/2000 – 30/06/2025

Display Report

This will show any Assessment the member has ever been in and if it is complete or incomplete.

Report – Show when awards expire before 31/12/xx

Reports/General Reports/Assessment and Award reports and select the Current Awards report.

In the Advanced section, you can select specific awards (e.g. Bronze Medallion) and Expiry date range – use 01/07/2019 to 31/12/2020 (for this seasons expiry)

Output to CSV.

If you want to communicate with these members to remind them of when the next proficiency is, use the Communications menu item and use the same filters.

REPORT – RTO NEEDS TO KNOW HOW MANY WERE ENROLLED VS COMPLETED (C / DNC / DNA / NYC)

Reports/General Reports/Assessment and Award reports and select the Assessments report.

CSV Output.

Advanced Search

If you are at "State", select "ALL" for Branch and Organisation

Award Type: AQTF Unit of Competency

Awards: Select the Award(s) you are interested in or "All"

Assessment Date – Generally the states need this for the calendar year (e.g. 01/01/2015 to 31/12/2015)

Assessment Type: Award

Assessment Status : Select Completed and Archived

Assessment Result: Select C, DNA, DNC, NYC

Download and use a pivottable to summarise (tick (row labels) Unit Code, Result & (sum value) Member ID)

STATE CENTRES: TRACKING AWARDS CREATED AND ALLOCATED VIA THE MEMBERS AREA

Awards fully processed via the Members Portal are automatically uploaded into the National Membership Database (Surfguard) within a members award file.

To correctly invoice for these awards, State Administrators should run an Award History report:-

Reports > General Reports > Assessment, Award and License Report Reports Type: Awards History
Advanced search Output: CSV Style (Excel Format) Award Type: Service Award Allocation (Processed)
Date: insert date range required Display Report Sort the spreadsheet by 'Processed by' which will show all awards processed via the Portal

9.4.3 Patrol Reports – examples

REPORT – PATROL TYPE HOURS FOR A MEMBER

Reports – General Reports

Report Type: Patrol Type Hours

Output: CSV (Excel)

First Name

Last Name

REPORT: HOW TO ASCERTAIN TOTAL PATROL HOURS FOR EACH MEMBER

Note: This report allows you to break down by Patrol Log Name

This report will give you members patrol hours for 'all' organisations that they have patrolled for.

Reports

General Reports

Patrol Reports

Select – Patrol Type Hours report

Click on advanced search – and select the following patrol types (Make Up, Rostered, Substitute, Visitor, Voluntary and Water Safety

Report Output – CSV.

Intl Membership: Supporter Member
Sponsor

Patrol Log Name:

Patrol Type: No-Show
Not Rostered/Excused
Other (Non Inclusive)
Penalty
Rostered
Substitute
Trainee
Visitor
Voluntary
Water Safety

Organisation Hours Type: Lifesaving Hours

Season Type: Competiton Season Patrol Season

Once you have produced the report

Delete first row so that column headers are at the top

Highlight all data – click on data from top menu – click on subtotal

Select in 'subtotal' box – Member ID, Sum and Member hours (see diagram below)

Brighton / Nipper Pa Water Sat

Subtotal

At each change in:
Member ID

Use function:
Sum

Add subtotal to:

- Member Start Time
- Member Finish Time
- Organisation Name
- Patrol Log Name
- Patrol Type
- Member Hours

Replace current subtotals

Page break between groups

Summary below data

Remove All OK Cancel



If you are a genius at excel spreadsheets and subtotal you could close the subtotal columns on the left hand side which will leave you with just member ID and total number of patrol hours.

Scroll down to find any members with the patrol hour numbers that you are looking for

TOTAL MEMBER PATROL HOURS REPORT – Custom report

- With membership category
- Does not include Water Safety

- Does not include other organisations
- Template Saved – Total Member Patrol Hours with Membership Category & Specific Patrol Types

Custom Report

General Details (tick LHS) First name Last name Member ID

Organisation Membership Details (tick LHS) Membership Type Status (highlight all status options (RHS)

Registered for season (type in 2019 (RHS))

Patrol Logs (tick LHS) Patrol Log Date (type in 01/07/2019 to 30/06/2020 RHS) Patrol Log Status

Patrol Log Members (tick LHS) Member Patrol Type (select – Make Up, Rostered, Substitute, Visitor, Voluntary (RHS) Member Patrol Time Duration

Select CSV excel format for download format

REPORT: TOTAL ROSTERED PATROL HOURS AND WATER SAFETY FOR EACH MEMBER BREAKING IT DOWN BY MEMBERSHIP CATEGORY

Reports > General Reports > Patrol Reports

Report Type: Patrol Type Hours

Display: CSV

Advanced Search

Status: Active

Registered Season: 2019

Membership Type: Highlight one Membership Type (will have to do report for each membership type) as the Membership Type does not appear as a column in Excel.

Patrol Type: Highlight for example (Make Up, Rostered, Substitute, Visitor, Voluntary and Water Safety)

Date Range: use default date unless you want specific dates

Display Report

Once you have displayed the report you can do “sub total” in Excel by Member ID and add up hours

REPORT: STATE OFFICE WANTING TO SEE HOW MANY PATROL TEAMS EACH CLUB HAS

Reports > General Reports > Patrol Reports

Report Type: Total Team Patrol Hours

Output: CSV

Advanced Search

Branch: All

Organisation: All

Leave the Default Date Range

Once you download the report into Excel. You can delete all columns except for Organisation and Team Name

You can then do a Sub Total based on each change of Organisation Name and then get a Count based on Team Name

REPORT: FIND MEMBERS WHO ARE NOT COMPLETING THEIR PATROL HOURS

Reports > General Reports > Patrol Reports

Report Type: Total Member Patrol Hours

Output Format: CSV Style

Click: Advanced Search

Status: Active

Registered Season: 2019

Season Type: Patrol Season

Total Hours: Choose how you want to filter from the drop-down menu and put the number of hours.

Display the Report

REPORT: TOTAL MEMBER PATROL HOURS

You can obtain a report for each club of their members 'Total Patrol Hours'.

Drill down to the club level (as this report is only available at club level)

Click on reports – general reports – patrol reports

Select 'total Member Patrol Hours' report.

Select the output format.

At the bottom of the screen change the date range to 01/07/2019 to current date (see below). Some clubs have put into surfguard 'past patrol hours' gained by members prior to surfguard birth in 2003 so you may wish to set the date range back even further.

Once you have this report (in CSV style – delete all columns except first name, last name and All Patrolled Hours (Excluding Penalty Hours)).

REPORT: TOTAL MEMBERS PATROL HOURS FOR MARCH

Patrols – General Reports – Patrol Reports

Report Type: Total Member Patrol Hours

Output Format: CSV Style (Excel Format)

Click on Advanced Search

UNTICK "Include Postal Address and DOB in Output"

Status: Active

Organisation Hours Type: Lifesaving Hours

Season Type: Make sure the default is date range

Put in the date range 01/03/2020 – 31/03/2020

UNTICK Include Deficit Hours in Output

Click on Display Report at bottom of page.

REPORT TO GET THE FOLLOWING STATS BY A BRANCH FOR EACH MONTH

- Rescues performed
- Activity during rescue i.e. swimming, boardriding
- Equipment uses during rescue i.e. board or IRB
- No first aid cases performed
- No Marine stings
- No visitors to the beach

Go to Reports > General Reports>Patrol Reports

Report Type: Patrolled and/or Unpatrolled Stats

Output Format: CSV Style (Excel Format)

Click Advanced Search

Organisation: All

Include Breakdown by Organisation: Tick this box if you want an additional breakdown for each club

Organisation Type: SLS Organisations

Stats Type: All

Season Type: Make sure the Date Range is highlighted and then you would put in the date range for each month, eg 01/11/2019 – 30/11/2020

Display Section: All

Under the Summary tab, you can also get a summary of Patrol Stats but it only does it for the entire season, there is no option to breakdown by month.

REPORT – PATROLLED AND/OR UNPATROLLED STATS

Reports – General Reports – Patrol Reports

Report Type: Patrolled and/or Unpatrolled Stats

Output: CSV/Excel

Click on Advanced Search

Branch: All
Organisation: All
Include Breakdown by Branch/Organisation: Tick box
Organisation Type: Highlight "SLS Organisations"
Stats Type: All
Season Type: Leave as default date range or modify
Display Sections: Highlight "Rescues"
Display Report

PATROL HOURS IN SUMMARY TAB DIFFERENT TO PATROL HOUR CALCULATION IN CUSTOM REPORT

We've been looking into the SQL for both of these queries and we now understand the reason for the difference in values:

The Patrol Hours Organisation summary takes into account all hours logged for that organisation
The custom report only takes into account hours logged in that organisation by members of that organisation.

So the summary is actually working as it should.

In the Summary It is countable hours. Specifically, it excludes Penalty, No Show, Non Rostered, Arranged Substitute, Trainee, Other.

PATROL LOG / SERVICE COMPARISON REPORT

Below are some notes on what this report is comparing and why you may get Completed or Partial in the report.

The report is comparing the hours that a club is supposed patrol based on their Service Profile times entered in Surfguard and the start and finish times entered in the patrol log.

For the log on the 24th February in their Service Profile they should have patrolled from 0900-1700hrs but the log for this day shows they patrolled from 1000 – 1400hrs. Therefore they partially patrolled based on their service profile.

For the log on the 4th March the report shows as completed as the service profile for this date range is 1000-1400hrs and this is the same as the hours in the patrol log.

9.4.4 Messaging Reports – examples

REPORT: SEND MESSAGE TO MEMBERS ADVISING WHEN THEIR AWARD IS EXPIRING

To do this a club can go to the Email/SMS option

Once loaded open the "awards" filtering section by ticking the "awards" box.

You can then select the award (eg Senior First aid) and
Select an expiry date period (eg “from” 01/02/2020 – “To” 30/04/2020).

This will then list all members in the club who hold an award of that type that will be expiring in the next 3 months.

The club can then send an SMS message or email to all these people letting them know that their award is expiring and suggest some requal days etc.

TROUBLESHOOTING MESSAGES NOT BEING SENT

The most likely cause for Surfguard errors with messaging is cutting and pasting text into the Surfguard message. If you have a short message, try just typing it – Surfguard likes PLAIN Text only (no formatting) and avoid use of a lot of special characters (<>()@#\$\$%^& etc). If you have a long message, or really want/ need to use formatting, save the document and send it as an attachment to the message – Email attachments can be CSV, images, pdf, powerpoint, rich text, spreadsheets, text, word docs, zip/gzip. Total Max file size 1.5Mb. We are working on an enhancement to make Surfguard more tolerant of formatting and special characters.

If you continue to have trouble with messaging, please ring us on 1300 724 006 while you are at your computer, logged onto Surfguard and we'll sort out what is causing your problems together.

Causes for issues:

Type PLAIN Text only (no formatting) and avoid use of a lot of special characters. <>()@#\$\$%^& etc
SMS can be sent to a maximum of 150 recipients.

Email attachments can be CSV, images, pdf, powerpoint, rich text, spreadsheets, text, word docs, zip/gzip.
Total Max file size 1.5Mb.

For a person to receive email, they must have a valid email address and/or mobile phone in their Surfguard membership details.

If someone is not receiving messages, check their Surfguard membership details, is the checkbox Do not send email/SMS communications ticked?

SEND EMAIL TO ACTIVE MEMBERS IN CURRENT SEASON AND ALSO THOSE WHO HAVE NOT RENEWED FROM PREVIOUS SEASON

Go to Message > Email/SMS

Message Type: Communicate With Members

Output Format: Email

Click 'Advanced Search'

DON'T USE “Registered Season” USE: Registration Date eg 01/07/2019 – 31/05/2020

MESSAGE HISTORY HOW TO FIND A MESSAGE OR EMAIL THAT WAS SENT BY SURFGUARD

Select the Club/Organisation that sent the message

Click Maintenance > Background Reports/Messages > Scheduled Background Reports / Messages

Change “Enabled” to “All”

If you know when the message was sent, you can limit your output by using the Scheduled Run Date To/From boxes.

You can sort the messages by “Output Format” (email, sms) or by Scheduled Date/Time if you know when the original message was sent.

Select the message, click “View” on the right hand side, and you can see who the message was sent to.

9.5.5 Reporting Webinar

Overview of Managing Members within Surfguard and associated systems, presented as a webinar on 16th July 2019. Produced by Surf Life Saving Australia as part of ongoing training and support to clubs and membership.

10. Branch/State Additional Functions

The details displayed in SurfGuard are dependent on your level of access. For those who have Branch or State level administrative access, a range of different sub-menu options is available. The available view on some screens will also be expanded to include all Club information within your Branch or State.

10.1 Members

There are two additional features under this tab

1. Membership at Multiple Organisations Display
2. Endorsing Transfers on Behalf of Losing Clubs

1. Membership at Multiple Organisations Display

If searching for a member at a Branch, State or National level and the member belongs to more than one organisation, instead of listing them many times, the Find Member screen displays the member once only and a link is provided to view all their organisations and details related to them.

SURFGUARD Surf Life Saving Australia

Summary | **Members** | Education | Organisational Management | Patrols | Messages | Maintenance | Reports

Members @ Surf Life Saving Australia

<input type="checkbox"/>	Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/>	4263832	Border	Allan	15/10/1965	Multi-Memberships						

Criteria: First Name begins with allan; Surname begins with bor; Competitor

Page: 1
Total Records: 1

No.	Organisation	Registered Season	Status	Membership Category	Competitor
1	Test NSW Club	2017 - 2018	Active	Life Member	No
2	Test Vic Club	2017 - 2018	Active	Award Member	Yes
3	Avalon Beach	2016 - 2017	Archived	Award Member	No
4	Life Saving Victoria Academy	2017 - 2018	Active	Non Member Participants	No
5	Test NSW Support Ops Club	2014 - 2015	Active	Active (18yrs and over)	No
6	TEST WA Club	2015 - 2016	Active	Award Member	No

Membership at Multiple Organisations

To turn off this feature, use the checkbox beside Return single row for multi- memberships on the Find Member screen

Find Member @ Surf Life Saving Australia

Search For a Member

State:

Branch:

Organisation:

Member ID:

First Name:

Last Name:

Date of Birth - From: To: (dd/mm/yyyy)

Home Phone: Mobile:

Email:

Competitor:

- Include active records

- Include archived records

- Include suspended records

- Include deceased records

- Include expelled records

- Only members with awards

- Only members with patrol data

- Only members with pending member requests

- Only members with notes

- Only members with documents

- Check this to search on part of name

- Return single row for multi-memberships

Records Per Page:

If a member is not appearing in your list when searching a member, please ensure you also tick boxes such as 'Include Suspended records, Expelled and deceased'. SLSA is the only organisation that can change a member file to Expelled.

Where a person belongs to more than one organisation within a branch/state, all the person's memberships are listed in a simple, easy to view membership section. A button is available next to each organisation to open the details and view/edit as required.

Normal View

SurfGuard Administrators who have club access will see this view.

Lifesaving Membership(s) v Expand All Lifesaving ^

1. Surf Life Saving SA Academy ^

Membership Category: ▼

Sub-Membership Category: ▼

Suggested Sub-Membership Categories: [expand](#)

Date Joined: * (dd/mm/yyyy)

Membership Status: ▼

Registered for Season:

Register for Season:

Locker No:

Club Keys:

Guardian Information

Guardian First Name:

Guardian Last Name:

Declaration Information

Signed Membership Declaration:

Signed Liability Declaration:

Signed Guardian Declaration:

Signed Date: (dd/mm/yyyy)

Member Verification

Condensed View

SurfGuard Administrators who have Branch/State or National will see the condensed view.

Lifesaving Membership(s) v Expand All Lifesaving ^

1. Surf Life Saving SA Academy v

2. Test NSW Club v

3. Test NSW Support Ops Club v

4. Test QLD Club v

5. Test Vic Club v

2. Transfers

The transfer rules and definitions which apply in SurfGuard are explained in [Section 3.7](#)

If a Branch/State approves a Not Endorsed transfer, they are overriding the decision of the Club and, in effect, endorsing the transfer on behalf of the Club.

To carry out the wishes of the Club, the Branch/State should reject the transfer.

Note: Branch and State can only get involved in processing a transfer on behalf of a club if the club has not actioned the transfer in 21 days.

Type:

Winning Club:

Direction:

Sort By:

Status:

Losing Club:

Member Name:

Transfer In										
ID	Member ID	Name	Winning Club	Losing Club	Transfer Type	Create Date	Most Recent Action Date	Age	Status	Action
110653	476		Wanda	Elouera	Full Transfer	14/02/20	14/02/20	3 days	New	Endorse for Club Not Endorse for Club

10.1.1 Membership at Multiple Organisations Display

1. Membership at Multiple Organisations Display

If searching for a member at a Branch, State or National level and the member belongs to more than one organisation, instead of listing them many times, the **Find Member** screen displays the member once only and a link is provided to view all their organisations and details related to them.

The screenshot shows the SURFGUARD interface. At the top, there is a navigation bar with tabs for Summary, Members, Education, Organisational Management, Patrols, Messages, Maintenance, and Reports. The current view is 'Members @ Surf Life Saving Australia'. Below this, a table displays member information. A member with ID 4263832, surname Border, and first name Allan is shown with a 'Multi-Memberships' link. A pop-up window titled 'Multi-Memberships' is open, showing a detailed list of organisations.

Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Membership Category	Competitor	Contact Number	User Options
<input type="checkbox"/>	4263832	Border	Allan	15/10/1965	Multi-Memberships					

Criteria: First Name begins with allan; Surname begins with bor; Competitor

Page: 1
Total Records: 1

No.	Organisation	Registered Season	Status	Membership Category	Competitor
1	Test NSW Club	2017 - 2018	Active	Life Member	No
2	Test Vic Club	2017 - 2018	Active	Award Member	Yes
3	Avalon Beach	2016 - 2017	Archived	Award Member	No
4	Life Saving Victoria Academy	2017 - 2018	Active	Non Member Participants	No
5	Test NSW Support Ops Club	2014 - 2015	Active	Active (18yrs and over)	No
6	TEST WA Club	2015 - 2016	Active	Award Member	No

Membership at Multiple Organisations

To turn off this feature, use the checkbox beside Return single row for multi- memberships on the Find Member screen

Find Member @ Surf Life Saving Australia

Search For a Member

State:

Branch:

Organisation:

Member ID:

First Name:

Last Name:

Date of Birth - From: To: (dd/mm/yyyy)

Home Phone: Mobile:

Email:

Competitor:

- Include active records

- Include archived records

- Include suspended records

- Include deceased records

- Include expelled records

- Only members with awards

- Only members with patrol data

- Only members with pending member requests

- Only members with notes

- Only members with documents

- Check this to search on part of name

- Return single row for multi-memberships

Records Per Page:

If a member is not appearing in your list when searching a member, please ensure you also tick boxes such as 'Include Suspended records, Expelled and Deceased'. SLSA is the only organisation that can change a member file to Expelled.

Where a person belongs to more than one organisation within a Branch/State, all the person's memberships are listed in a simple, easy to view membership section. A button is available next to each organisation to open the details and view/edit as required.

10.1.2 Viewing Multiple Memberships

Normal View

SurfGuard Administrators who have club access will see this view.

Lifesaving Membership(s) v Expand All Lifesaving ^

1. Surf Life Saving SA Academy ^

Membership Category: ▼

Sub-Membership Category: ▼

Suggested Sub-Membership Categories: [expand](#)

Date Joined: *
(dd/mm/yyyy)

Membership Status: ▼

Registered for Season:

Register for Season:

Locker No:

Club Keys:

Guardian Information

Guardian First Name:

Guardian Last Name:

Declaration Information

Signed Membership Declaration:

Signed Liability Declaration:

Signed Guardian Declaration:

Signed Date:
(dd/mm/yyyy)

Member Verification

Condensed View

SurfGuard Administrators who have Branch/State or National will see the condensed view.

Lifesaving Membership(s) v Expand All Lifesaving ^

1. Surf Life Saving SA Academy v
2. Test NSW Club v
3. Test NSW Support Ops Club v
4. Test QLD Club v
5. Test Vic Club v

10.1.3 State/Branch Transfers

Transfers

The transfer rules and definitions which apply in SurfGuard are explained in [Section 3.7](#)

If a Branch/State approves a Not Endorsed transfer, they are overriding the decision of the Club and, in effect, endorsing the Transfer on behalf of the Club.

To carry out the wishes of the Club, the Branch/State should reject the transfer.

Note: Branch and State can only get involved in processing a transfer on behalf of a club if the club has not actioned the transfer in 21 days.

Transfer In										
ID	Member ID	Name	Winning Club	Losing Club	Transfer Type	Create Date	Most Recent Action Date	Age	Status	Action
110653	4 76		Wanda	Elouera	Full Transfer	14 20 14 020	3 days	New		Endorse for Club Not Endorse for Club

10.2 Education

Generally, only members who are not in another incomplete assessment request will be listed as the available members for assessment.

Age restrictions and pre-requisites are implemented; hence, minimum and maximum ages are as of 30 September of the current registration season or as of the current date if past 30 September.

The following Assessment rules or definitions apply in SurfGuard.

Manual Award Number: This is a manual number that the state can allocate to a member for an award. It will appear in the engravers report and certificate.

Proficiency Type: Only members who hold the award will be listed in the available members.

All Other Assessment Types: Only members who do not hold the award will be listed in the available members.

Clubs, Branches and States can Archive Assessments.

To archive complete assessments if you are a State, select 'Assessment Status – Complete' and 'All' Assessment Types.

To archive complete assessments if you are a Branch (or Club), select 'Assessment Status – Complete' Status and 'Proficiency' Assessment Type.

To archive rejected assessments, select 'Rejected' Status. An 'Archive' button will appear against each individual Assessment/Proficiency. When clicked, it will archive the currently displayed assessment request.



It should be noted that Clubs and Branches should follow their State Office procedures in relation to Archiving Awards.

Assessment Request List @ Surf Life Saving Australia

State: For This Organisation:
 Branch: Organisation:

Assessment Status: Assessment Type:
 Award Type: Award:

Assessment ID: Proposed Assessment Date - From: To: (dd/mm/yyyy)
 Source Company: Activity Start Date - From: To: (dd/mm/yyyy)

Surf Life Saving Australia [\(Award Finance Summary\)](#) [\(Award Issue Advice\)](#)

Select	ID	Award/Qualification/UOC	Assessment Type	Organisation (Enrolment Source Company)	No. of Members	Proposed Assessment Date	Activity Start Date	Status	Action
<input type="checkbox"/>	534183	SS - Craft Scrutineer Official	Award	Surf Life Saving Australia	4	03/10/2019	03/10/2015	Complete	Update Enrolment Form Export Results Form 14 Print Attendance Sheet Print Engravers Report Print SLSA Certificate Archive

Total: 1 assessment(s).

Total: 1 assessment(s) in 1 organisation(s).

10.3 Patrols

Closing and re-opening Patrol Logs

At a State and branch level, the 'Authorise Requests' option allows you to authorise changed to Patrol Logs that need to be made by clubs.

This screen has a number of options and allows you to sort data by Council, Beach, Action Types, Request Types/or Status Types.

Authorise Requests by clicking the 'Accept' or 'Reject' buttons in the 'Actions' column for the relevant Patrol Log entry.

You will be required to notate a reason for rejecting or accepting the requested action before continuing.

URFGUARD Life Saving Victoria

Members Education Organisational Management **Patrols** Messages Maintenance Reports Member S...

Patrol Log/Unpatrolled Stats Requests View @ Life Saving Victoria

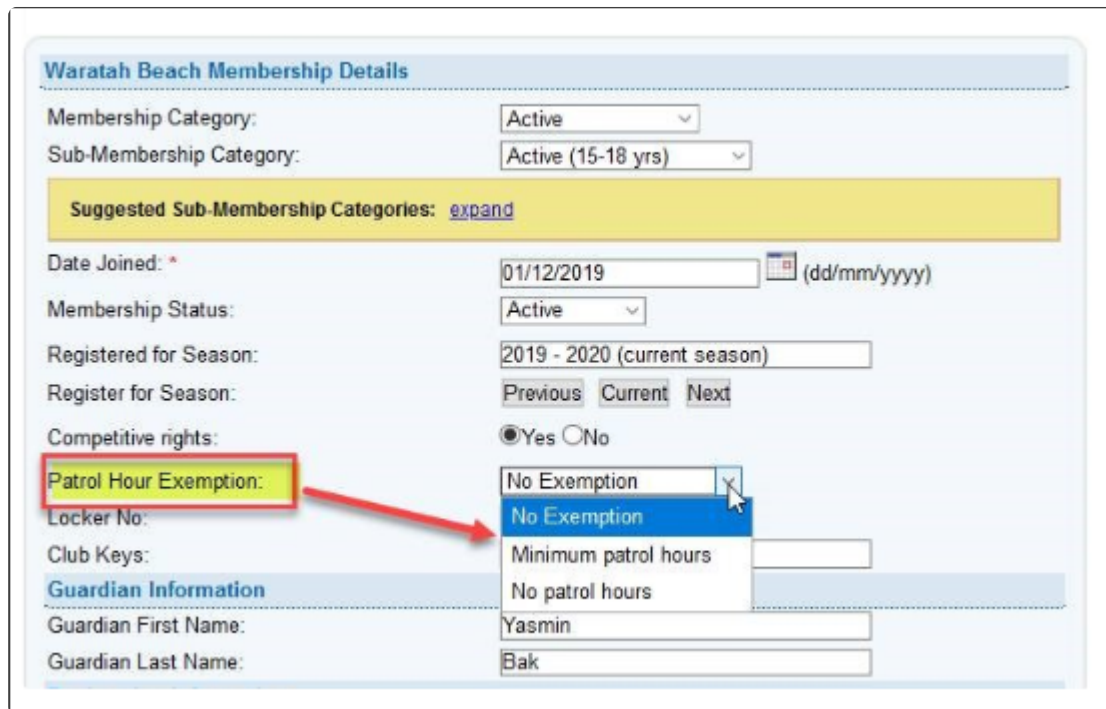
Branch: Organisation: Request Types:
 Action Types: Request Status:

Organisation	Request Date	Request Type	Requested By	Action Type	Request Reason	Status	Patrol Date	Patrol Name	Authorise Date	Authorise Reason	Date Closed	Actions
Test Vic Club	15/04/2020	Patrols	Somerfield, Joshua	Delete	test	Waiting	15/04/2020	TEST IT Morning Checks				<input type="button" value="Accept"/> <input type="button" value="Reject"/>

Other Service Hours

See below how to add Other Service Hours in SurfGuard

Mark in the members profile in SurfGuard if they are eligible for an exemption



Waratah Beach Membership Details

Membership Category:

Sub-Membership Category:

Suggested Sub-Membership Categories: [expand](#)

Date Joined: * (dd/mm/yyyy)

Membership Status:

Registered for Season:

Register for Season:

Competitive rights: Yes No

Patrol Hour Exemption:

Locker No:

Club Keys:

Guardian Information

Guardian First Name:

Guardian Last Name:

State Centre can setup in SurfGuard Other Service position types for Service Hours in the case of South Australia, they have set up one position called Sport Official.

Surf Life Saving SA

Patrols Messages Maintenance Reports

Patrol Positions @ Surf Life Saving SA

Position Type: All

NOTE: Patrol Positions with Position Type 'Other Service' have no Award Criteria.

Position	Position Type	Display Order	Actions
Age Group Manager	Other Service	1	Details Edit Delete
Club Management/Administration	Other Service	1	Details Edit Delete
Patrol Captain	Lifesaving	1	Details Edit Award Criteria Delete
Sport Coaching	Other Service	1	Details Edit Delete
Sport Official	Other Service	1	Details Edit Delete
Vice Captain	Lifesaving	2	Details Edit Award Criteria Delete
IRB Driver	Lifesaving	3	Details Edit Award Criteria Delete
IRB Crew	Lifesaving	4	Details Edit Award Criteria Delete
ARTC Operator	Lifesaving	5	Details Edit Award Criteria Delete
Bronze Medallion	Lifesaving	6	Details Edit Award Criteria Delete

Add Member and Hours to the Other Service Log once the positions are setup by State clubs can then enter the other service hours. To do this select Patrols > Other Service Log > Add Other Service Log

Other Service Log Details:

Patrol Name: Other Service

Date: 31/01/2020 dd/mm/yyyy

Retrieve Available Members:

Include Non-Financial Members:

Available Members	
Accounto, Test	
Accounts, Test	
Ahsan, Kazi	
allans, stevie	
Anderson, Michael	
Andres, r	
Rakhdh, Rnu	

No.	Position	Remove Member	Add Member	Member	Start Time	Finish Time	Total Time
1	Official	<	Mbr >	Bunny, Bugs	10:00	16:00	06:00
2	BBQ	<	Mbr >	Butler, Peanut	09:00	17:00	08:00
3		<	Mbr >		00:00	00:00	00:00
4		<	Mbr >		00:00	00:00	00:00

10.3.1

Closing and re-opening Patrol Logs

At a State and branch level, the 'Authorise Requests' option allows you to authorise changed to Patrol Logs that need to be made by clubs.

This screen has a number of options and allows you to sort data by Council, Beach, Action Types, Request Types/or Status Types.

Authorise Requests by clicking the 'Accept' or 'Reject' buttons in the 'Actions' column for the relevant Patrol Log entry.

You will be required to notate a reason for rejecting or accepting the requested action before continuing.

10.3.2 Other Service Hours

Other Service Hours

See below how to add Other Service Hours in SurfGuard

Mark in the members profile in SurfGuard if they are eligible for an exemption

State Centre can setup in Surfguard Other Service position types for Service Hours in the case of South Australia, they have set up one position called Sport Official.

Surf Life Saving SA

Patrols Messages Maintenance Reports

Patrol Positions @ Surf Life Saving SA

Position Type: All

NOTE: Patrol Positions with Position Type 'Other Service' have no Award Criteria.

Position	Position Type	Display Order	Actions
Age Group Manager	Other Service	1	Details Edit Delete
Club Management/Administration	Other Service	1	Details Edit Delete
Patrol Captain	Lifesaving	1	Details Edit Award Criteria Delete
Sport Coaching	Other Service	1	Details Edit Delete
Sport Official	Other Service	1	Details Edit Delete
Vice Captain	Lifesaving	2	Details Edit Award Criteria Delete
IRB Driver	Lifesaving	3	Details Edit Award Criteria Delete
IRB Crew	Lifesaving	4	Details Edit Award Criteria Delete
ARTC Operator	Lifesaving	5	Details Edit Award Criteria Delete
Bronze Medallion	Lifesaving	6	Details Edit Award Criteria Delete

Add Member and Hours to the Other Service Log once the positions are setup by State clubs can then enter the other service hours. To do this select Patrols > Other Service Log > Add Other Service Log

Other Service Log Details:

Patrol Name: Other Service

Date: 31/01/2020 dd/mm/yyyy

Retrieve Available Members:

Include Non-Financial Members:

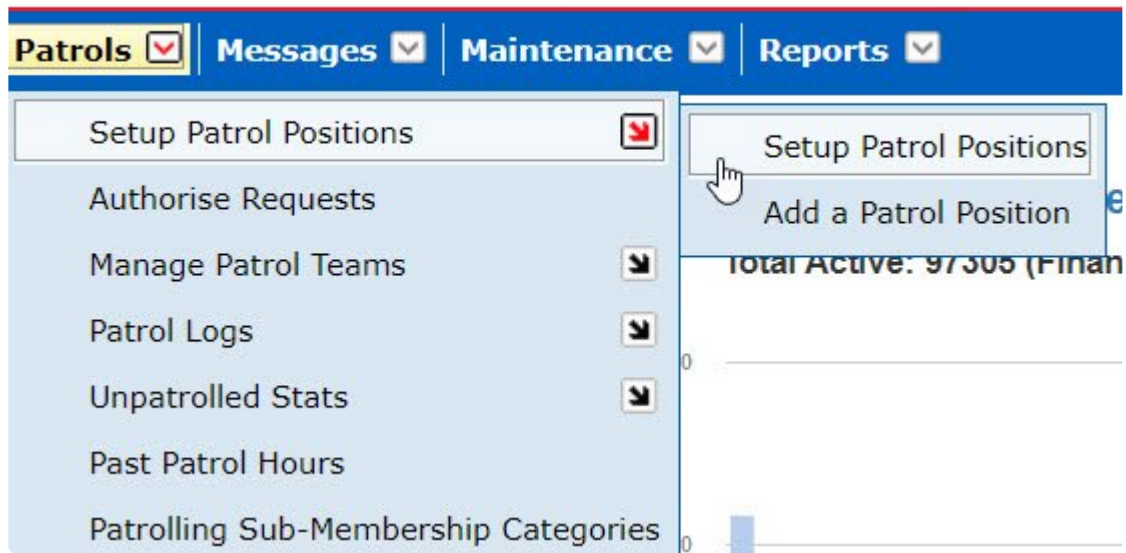
Available Members

- Accounto, Test
- Accounts, Test
- Ahsan, Kazi
- allans, stevie
- Anderson, Michael
- Andres, r
- Rakhdh, Rnu

No.	Position	Remove Member	Add Member	Member	Start Time	Finish Time	Total Time
1	Official	<	Mbr >	Bunny, Bugs	10:00	16:00	06:00
2	BBQ	<	Mbr >	Butler, Peanut	09:00	17:00	08:00
3		<	Mbr >		00:00	00:00	00:00
4		<	Mbr >		00:00	00:00	00:00

10.3.3 Set Up Patrol Positions

From the Patrols Menu tab – select ‘Set Up Patrol Positions’



The screen will display a list of the current Patrol Positions set up for the users State that are displayed in a patrol log.

The Options buttons allows for viewing the details of each patrol position, editing, viewing the award criteria for each patrol position and deleting.

[Patrols](#) |
 [Messages](#) |
 [Maintenance](#) |
 [Reports](#)

Patrol Positions @ Surf Life Saving NSW

Position Type:

All

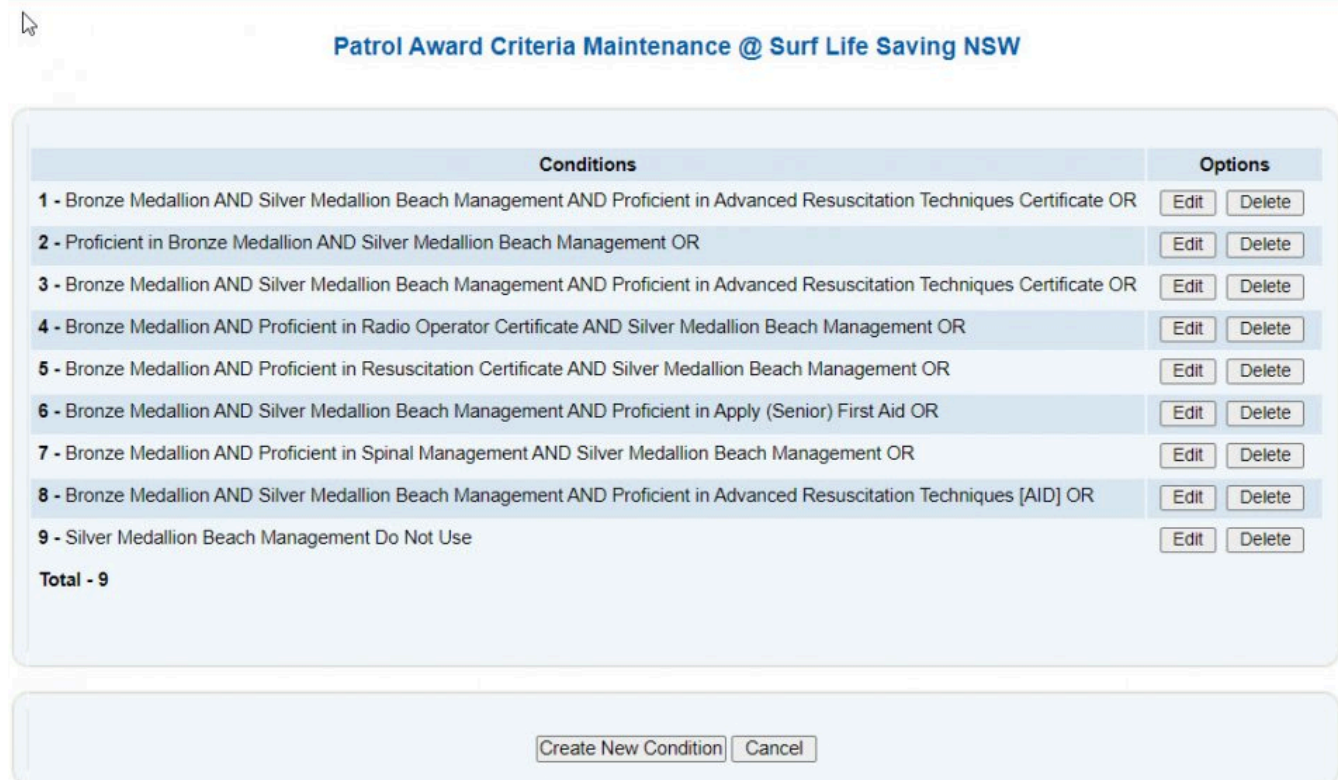
NOTE: Patrol Positions with Position Type 'Other Service' have no Award Criteria.

Position	Position Type	Display Order	Actions			
Patrol Captain	Lifesaving	1	Details	Edit	Award Criteria	Delete
Vice Captain	Lifesaving	2	Details	Edit	Award Criteria	Delete
IRB Driver	Lifesaving	3	Details	Edit	Award Criteria	Delete
IRB Crew	Lifesaving	4	Details	Edit	Award Criteria	Delete
ART Operator	Lifesaving	5	Details	Edit	Award Criteria	Delete
Patrol Application Captain	Lifesaving	5	Details	Edit	Award Criteria	Delete
First Aid Officer	Lifesaving	6	Details	Edit	Award Criteria	Delete
Bronze Member	Lifesaving	7	Details	Edit	Award Criteria	Delete
Radio Operator	Lifesaving	7	Details	Edit	Award Criteria	Delete
Award Member	Lifesaving	8	Details	Edit	Award Criteria	Delete
SRC	Lifesaving	9	Details	Edit	Award Criteria	Delete
Supervisor	Lifeguard	10	Details	Edit	Award Criteria	Delete
Senior Lifeguard	Lifeguard	11	Details	Edit	Award Criteria	Delete
Lifeguard	Lifeguard	12	Details	Edit	Award Criteria	Delete
RWC Operator	Lifesaving	13	Details	Edit	Award Criteria	Delete
Surfcom Supervisor	Lifesaving	14	Details	Edit	Award Criteria	Delete
SurfCom Radio Operator	Lifesaving	15	Details	Edit	Award Criteria	Delete
ORB Skipper	Lifesaving	16	Details	Edit	Award Criteria	Delete
ORB Driver	Lifesaving	17	Details	Edit	Award Criteria	Delete
ORB Crew	Lifesaving	18	Details	Edit	Award Criteria	Delete
ORB Trainee	Lifesaving	19	Details	Edit	Award Criteria	Delete

Patrol Position Award Criteria

Click on the Action Button 'Award Criteria' for a patrol position to view all the awards that a member must/should hold.

From the screen users can add additional award criteria by clicking on the 'create new condition' button located bottom of the screen.



Patrol Award Criteria Maintenance @ Surf Life Saving NSW

Conditions	Options
1 - Bronze Medallion AND Silver Medallion Beach Management AND Proficient in Advanced Resuscitation Techniques Certificate OR	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2 - Proficient in Bronze Medallion AND Silver Medallion Beach Management OR	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
3 - Bronze Medallion AND Silver Medallion Beach Management AND Proficient in Advanced Resuscitation Techniques Certificate OR	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
4 - Bronze Medallion AND Proficient in Radio Operator Certificate AND Silver Medallion Beach Management OR	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
5 - Bronze Medallion AND Proficient in Resuscitation Certificate AND Silver Medallion Beach Management OR	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
6 - Bronze Medallion AND Silver Medallion Beach Management AND Proficient in Apply (Senior) First Aid OR	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
7 - Bronze Medallion AND Proficient in Spinal Management AND Silver Medallion Beach Management OR	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
8 - Bronze Medallion AND Silver Medallion Beach Management AND Proficient in Advanced Resuscitation Techniques [AID] OR	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
9 - Silver Medallion Beach Management Do Not Use	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Total - 9	

10.3.4 Patrolling Sub-Membership Categories

Patrolling Sub-Membership Categories

Each State is responsible for setting up the Patrolling Sub-Membership Categories.

Only members/lifeguards that fall into one of their States Patrolling Sub-Membership Categories can be added to a patrol log.

SURFGUARD Surf Life Saving NSW

Summary Members Education Organisational Management **Patrols** Messages Maintenance Reports Member Search

Patrolling Sub-Membership Categories @ Surf Life Saving NSW

Sub-Membership Category:
 Junior Activity Member (5-13 years) ▼
 Add Clear Cancel

Sub-Membership Category	Actions
Probationary	Delete
Junior Activity Member (5-13 years)	Delete
Cadet Member (13-15 years)	Delete
Active (15-18 yrs)	Delete
Active (18yrs and over)	Delete
Award Member	Delete
Reserve Active	Delete
Long Service	Delete
Past Active	Delete
Associate	Delete
Life Member	Delete
General	Delete
Honorary	Delete
Non Member Participants	Delete
Trainee Lifeguard	Delete
Casual Lifeguard	Delete
Part-Time Lifeguard	Delete
Full-Time Lifeguard	Delete
Senior Lifeguard	Delete
Lifeguard Supervisor	Delete

10.4 Maintenance

Allocating Awards to a Member

Only States can manually allocate Awards to Members using the 'Awards Allocations' sub-menu in SurfGuard. This allows you to search for a member by using their full name or member identification number. You can use drop-down options to enter all relevant information including their club name and the details of the award as seen in the image below.

Award Type Details

Allocation Type:

Award Type:

Available Awards:

- Safeguarding Children and Young People Awareness
- Safer Surf Clubs Online Part 1
- Safer Surf Clubs Online Part 2
- Safer Surf Clubs Online Part 3
- Safer Surf Clubs Online Part 4
- Search as a member of an air search team (PUAAMS0)
- Search as a member of an aquatic search team (PUAS)
- Secure cargo (TLIA1001)
- Show leadership in the workplace (BSBMGT401)
- Silver Medallion Aquatic Rescue
- Silver Medallion Beach Management
- Silver Medallion Communications Centre Operator
- Silver Medallion IRB Driver
- Sir Adrian Curlewis Scholarship
- SLSA Life Member

Select award and then use the > arrow to move award to Selected Awards column

Selected Awards:

- Silver Medallion Advanced First Aid [AID]

Override Prerequisite Checks:

Included Units of Competency

Available:

Selected:

- Provide advanced first aid (HLTAID006)

Member Search

State:

Branch:

Organisation:

Member ID:

First Name:

Last Name:

Filter by Branch/Organisation
And search for a member by using their
Member ID or First and Surname

Available Members:

Selected Members:

- Joshua Sommerfield

Trainers

Enter either the Trainer's Member ID or all or part of the Trainer's name before clicking Get Trainer List.

Search Trainer Member ID: Add a trainer by searching using their Member ID or First and Surname
The trainer must have the appropriate award to be a trainer and must be proficient

Search Trainer First Name:

Search Trainer Last Name:

Available:
Selected:

Award Details

Award Issue Date: (dd/mm/yyyy)

Manual Award Number:

Proficiency Date: (dd/mm/yyyy)

Evaluation Date: (dd/mm/yyyy)

Document Location:

Pool Time: : : (hrs : mins : secs)

Activity Time: : : (hrs : mins : secs)

Fill in Award Details as require
These must be filled in otherwise you will not be able to allocate the award

SL SA Originating Organisation

National: ▼

State: ▼

Branch: ▼

Organisation: ▼

Select Originating Organisation accordingly

Enrolment Source Details

Enrolment Source Type: ▼

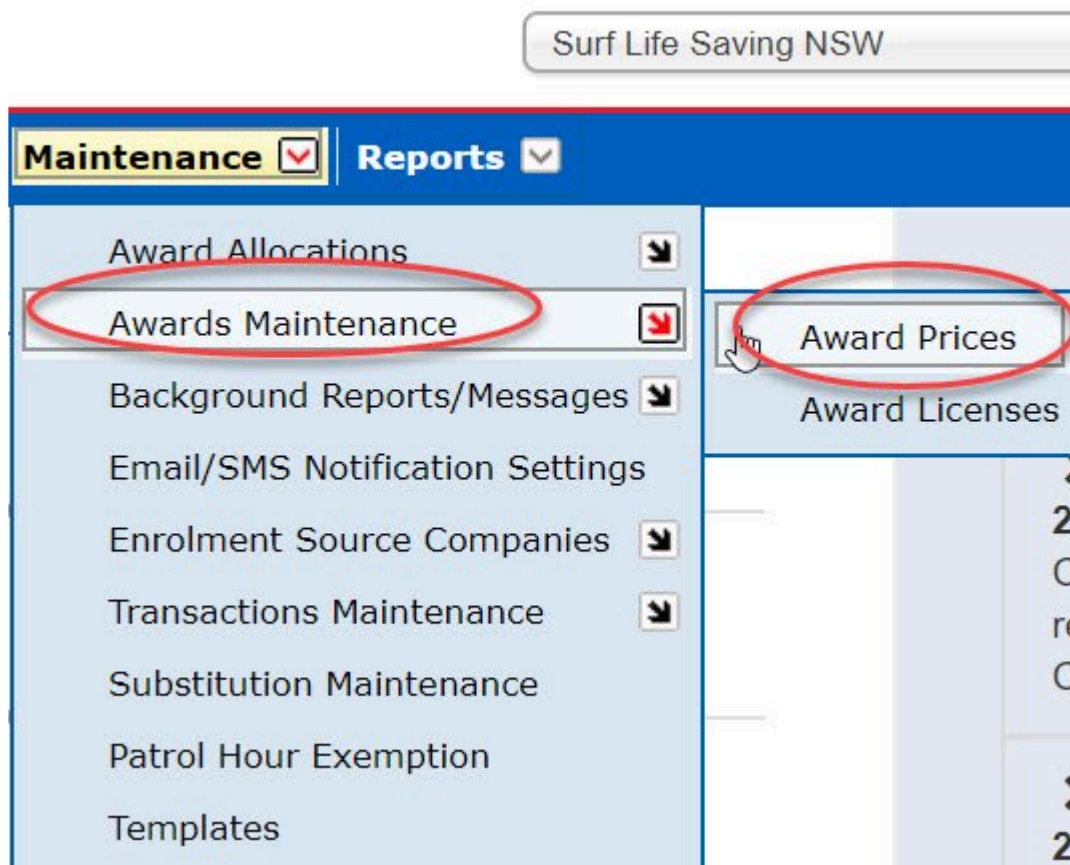
Source Company Name: ▼

Once you are completed filling in all the data click 'Allocate' and the next screen will advise if the Award has been successfully allocated

Award Maintenance

This area allows State Users to set prices for Awards.

Select **Award Maintenance** from the Maintenance Menu tab and select sub menu **Award Prices**



The screen will display (by default) all awards in the surfguard system allowing States to set a price for each award.

Using the Options keys to view, edit, delete or set new price for an award.

Use the drop down search fields to find a specific award.

Award prices set are State specific.



Surf Life Saving NSW

- Summary
- Members
- Education
- Organisational Management
- Patrols
- Messages
- Maintenance
- Reports

Member Search

Award Prices View @ Surf Life Saving NSW

Status: All Award Type: All Award: All

Prices Valid On: 21/05/2020 Format: dd/mm/yyyy (Leave blank to retrieve all prices.)

GO

Award Name	Award Type	Price Valid From	Price Valid To	Price	Options
10 Year Age Manager Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Assessing Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Coaching Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Facilitating Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Officiating Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
10 Year Training Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
15 Year Age Manager Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
15 Year Assessing Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
15 Year Coaching Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete
15 Year Facilitating Service Certificate	Service	01/07/2019	30/06/2020	17.20	New Price View Edit Delete

10.5 Reports

State Level Reports

License Processing

License Processing @ Surf Life Saving Australia

Award License: ▼
Output Format: ▼

Selection Criteria:

Reprint License: (Only licenses and member award allocations/proficiencies that have not changed since the last extract.)

State: ▼

Branch: ▼

Organisation: ▼

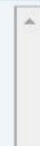
Please Note: The query may time out if branch or organisation is not selected.

Also, you may accumulate members from different organisations in the Selected Members list until you are ready to process the license.

Available Members:



Selected Members:



11. National Users

The details displayed in SurfGuard are dependent on your level of access. For those who have National level administrative access, a range of different sub-menu options is available. The available view on some screens will also be expanded to include all Club information, and allow you to sort information by Club, Branch, State or National sets.

11.1 SurfGuard User Administration

User Administration

The 'User Admin' function is located beneath the Banner in the Login Details area of your SurfGuard screen. All members have access to their own membership details via the 'Current User' menu item. You can change your contact details or password using this feature.



Certain users have been granted administrator rights within SurfGuard, as indicated by the option being available to you once you have logged on. The details displayed to you as an administrator are dependent on your level of access. If you believe you require higher User Admin access at Club, Branch, State and/or National level, contact the Help Desk.

Groups

The 'Groups' option allows you to manage the permissions groups that fall within your access level. Groups are listed by Name and can be sorted based on the Environment and Application to which they relate. For example, the SLSA Memberships Group has access to the Production environment and Membership application. This means that the data is live (as opposed to the playpen) and drawn from the membership database.

A number of actions are accessible from this screen. The 'Edit' button allows you to change certain information about the group — such as the name. Specific details about the group can be accessed via the 'View' button. The 'Permissions' button features a list of the different types of areas within SurfGuard that

the group can access. Using this function, as an administrator, you can assign read, write, update, delete and grant permissions to the group for all areas within SurfGuard.

Groups @ Surf Life Saving NSW

Group Name - From: To:

Environment: Application:

Group Name	Environment(s)	Application(s)	Actions			
Academic Only - Patrol stats Read Only	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>
Mailing Groups and Messaging	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>
NSW - Branch ONLY - Read-Only	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>
NSW Assessments (Rest NO ACCESS)	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>
NSW Assessments (Rest Read Only)	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>
NSW Club ONLY - Full access	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>
NSW Email and SMS Only (rest NO ACCESS)	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>
NSW Email and SMS Only (rest read only)	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>
NSW Full Access (Read Only Patrols)	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>
NSW Gear and Equipment (rest NO ACCESS)	Production	Memberships	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="View"/>	<input type="button" value="Permissions"/>

Users

The 'Users' option allows you to access and update users of the system. You can also add a new user via this menu option. To add a user, you must ensure that all mandatory fields are completed. These are indicated by an asterisk. A number of drop-down menus and tick boxes are also available.

Usually, a user's Main Organisation will be the organisation that they will be using the most within SurfGuard. A user can have access to other organisations as well by selecting them in the 'Available Organisations:' area. A new user must also be assigned permissions to a number of Groups by selecting from the available list. The groups set up previously will determine the access rights that the user has within SurfGuard.

A user remains 'active' from the time they first log in to SurfGuard. If your account has not been accessed for over three months, you will need to send the Help Desk a Form 49 requesting reactivation of the account.

Add User @ Surf Life Saving NSW

User Name: *

User Password: *

First Name: *

Surname: *

Main Organisation: *

Position:

Phone Number: * (include area code)

Mobile Phone:

Email: *

Force Password Change:

Registered for Newsletter:

Status: Active

User Account Start Date: (dd/mm/yyyy)

User Account End Date: (dd/mm/yyyy)

Send Email:

Email Template: New Account

User Created By: Surf Life Saving NSW

Please Note: Changing the 'User Created By' will give authority to the selected organisation (and others above it) to manage this user.

Groups

Available Groups:

- Academic Only - Patrol stats Read Only
- Mailing Groups and Messaging
- NSW - Branch ONLY - Read-Only
- NSW Assessments (Rest NO ACCESS)
- NSW Assessments (Rest Read Only)
- NSW Club ONLY - Full access
- NSW Email and SMS Only (rest NO ACCESS)
- NSW Email and SMS Only (rest read only)
- NSW Full Access (Rest Only Patrols)
- NSW Gear and Equipment (rest NO ACCESS)
- NSW Incidents
- NSW Incidents Administrators

selected Groups:

Organisations

State Level: All

Branch Level: All

Organisation Lowest Level: All

Organisation Sub-Type:

- Academy
- Beach Lifeguards
- Lifeguards (Non-ALS)
- Pool Lifeguards
- RTOs
- SLS Organisations
- Support Operations
- Other SLS Organisations

Available Organisations:

- Aslings (Lifeguards)
- AustInner
- AustInner (Lifeguards)
- Australian Lifeguard Service NSW (Lifeguards)
- Avaton Beach
- Avaton Beach (Lifeguards)
- Avoca (Lifeguards)
- Avoca Beach
- Ballina Lighthouse and Lismore SLSC
- Ballina Shire (Lifeguards)
- Bar Beach Bega (Lifeguards)
- Bar Beach Newcastle (Lifeguards)

selected Organisations:

[Retrieve Available Organisations](#)

Save Clear Cancel

User Created by: System at: // :
User Last updated by: System at: // :

11.2 Organisational Management

The 'Organisational Management' area allows you to undertake a number of functions, including defining and managing equipment. The 'Manage Gear and Equipment' option allows you to view a listing of all equipment held by the organisation. You can update stock details and add new items by clicking the 'Manage' button and following the prompts on the relevant sequence of screens. You can update stock details and add new items by clicking the 'Manage' button and following the prompts on the relevant sequence of screens.

Define Gear and Equipment Screen

View Gear & Equipment Definitions @ Surf Life Saving Australia

Name	Type	Options			
Administration Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Beach Vehicle (ATV)	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Buildings and Structures	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Club Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Competition Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Computer and Electrical	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Defibrillator	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
First Aid Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Fuel Cell	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Inflatable Rescue Equipment	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
IRB	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
IRB Motor	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
JRB	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Lifejacket	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Manikin	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
ORB	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Oxygen Resuscitator	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Patrol Equipment (Misc)	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Patrol Uniforms	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Personal Locator Beacons	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist
Radio	Complex	Edit	Delete	View & Edit Attributes	View & Edit Inspection Checklist

The 'Define Gear and Equipment' and 'Define Gear and Equipment Attributes' options allow you to name, describe and assign attributes to new equipment brought into service by any entity of SLSA

Define Gear and Equipment Attributes Screen

Gear & Equipment Definition @ Surf Life Saving Australia

Name: *

Description:

Type: ▼

Available Attributes:

- AMSA registration number (Large Text (100 characters); -)
- Board Make (List; -)
- Board Type (List; -)
- BSEF Grant (Boolean (Yes/No); -)
- Colour (List; -)
- Current Gear Inspection Date (Date; -)
- Date of Purchase (Date; -)
- Defibrillator Make (List; -)
- Defibrillator Model (List; -)
- Disabled Access (Boolean (Yes/No); -)

Selected Attributes:

- Age in Years (Number; -)
- Amount (Number; -)
- AMSA Registered (Boolean (Yes/No); -)

Checklist Settings

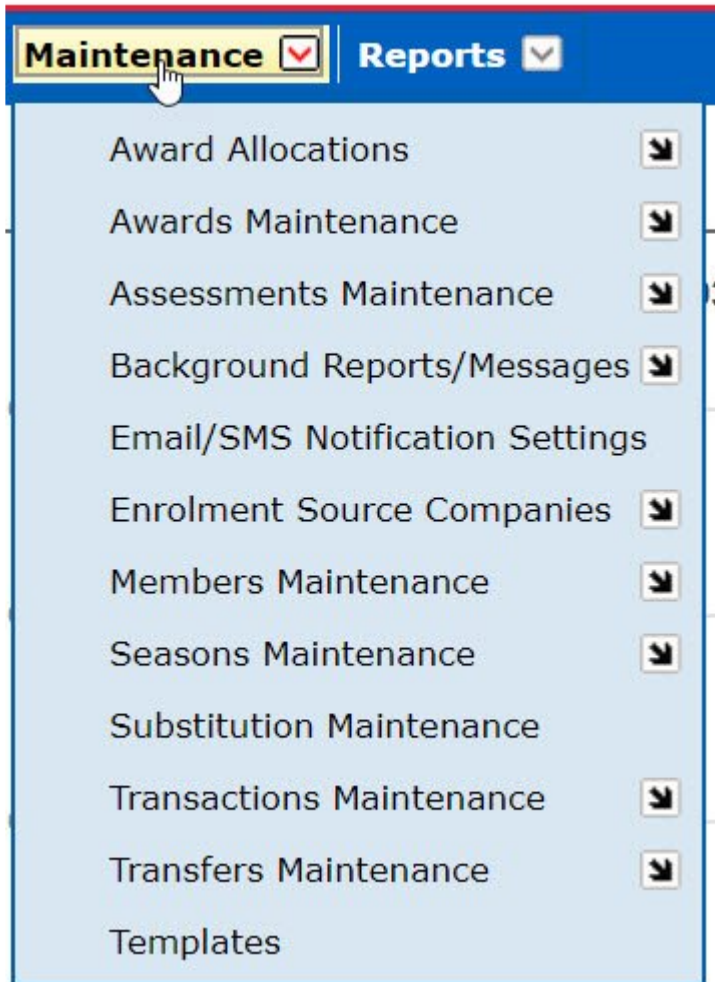
Inspection Checklist Item:

Form Number:

11.3 Maintenance

National Surfguard users have a number of additional functions located within the Maintenance Menu.

1. Award Allocations
2. Award Maintenance
3. Assessment Maintenance
4. Member Maintenance
5. Season Maintenance
6. Transacton Maintenance
7. Transfer Maintenance



11.3.1 Award Allocations

National Users may need to manually add an award to a members profile

Go to Maintenance – Award Allocations – Allocate New Awards

Select the 'Allocation Type': Award/CR/RCC/RPL

Select the 'Award Type'

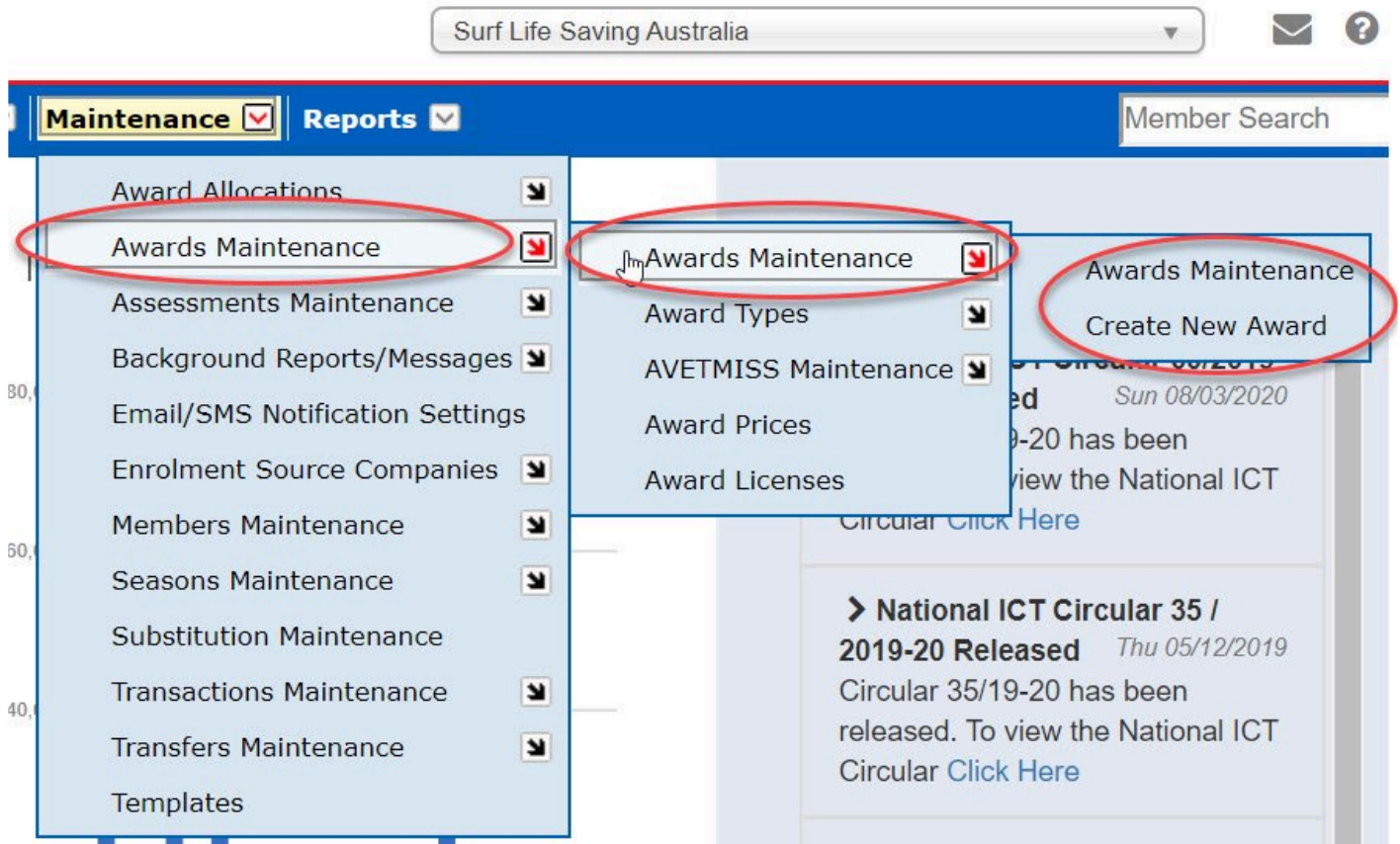
Select the Member, Assessor, Trainer

Add Manual Award Details

11.3.2 Award Maintenance

Award Maintenance and its sub menus allows National Users to maintain and create awards.

Only at a National Level can you create a new award.



Award Maintenance

From the Maintenance Menu – select Award Maintenance

The screen will list (by default) all awards in the Surfguard system.

Using the **Options** available you can view all the details for a specific award, look at the award prereqs also view the prereqs for the award Trainer and Assessor

Members ▾ Education ▾ Organisational Management ▾ Patrols ▾ Messages ▾ Maintenance ▾ Reports ▾ Member S

Awards Maintenance @ Surf Life Saving Australia

Award Type: All ▾ Status: Active ▾
Award ID: Award Name:
Submit Create New Award

Award Name	Award Type	Options					
10 Year Age Manager Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Assessing Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Coaching Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Facilitating Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year National Patrol Service Award	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Officiating Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs
10 Year Training Service Certificate	Service	View	Edit	Archive	Prereqs	Assessor Reqs	Trainer Reqs

Create New Award

From the Maintenance Menu – select Award Maintenance – Create New Award

Users need to input information pertaining to the award such as – award name, proficiency requirements, set award pre-requisites, set AVETMISS Reporting, identify who can raise and allocate the award, set the Units of Competency, set bulk proficiency dates (if applicable) etc.

Once all the new award fields are completed – click '**Add Award**'.

Award Types

The sub menu 'Award Types' (from Maintenance Menu – Award Maintenance) allows National users to set an Award Type against an award

Maintenance ▾ Reports ▾

Award Allocations ▾
Awards Maintenance ▾
 Assessments Maintenance ▾
 Background Reports/Messages ▾

Awards Maintenance ▾
Award Types ▾
 AVETMISS Maintenance ▾

Latest News
 Award Types
 Create New Award Type

By selecting **Award Types** the screen will list all the Award Types set in the system. Users can view, edit or delete from this screen

Messages Maintenance Reports

Award Types View @ Surf Life Saving Australia

Award Type	Options
AQTF Module	<input type="button" value="View"/> <input type="button" value="Edit"/>
AQTF Qualification	<input type="button" value="View"/> <input type="button" value="Edit"/>
AQTF Unit of Competency	<input type="button" value="View"/> <input type="button" value="Edit"/>
Other	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Recognition	<input type="button" value="View"/> <input type="button" value="Edit"/>
Service	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
SLSA Education	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
* System Award Types	
Total: 7	

11.3.3 Assessment Maintenance

Assessment Request Status (from the Maintenance Menu – Assessment Maintenance) allows National Users the ability to view or edit all the Assessment Request commands that are displayed in the Surfguard Education Module when processing awards at each level of the organisation.



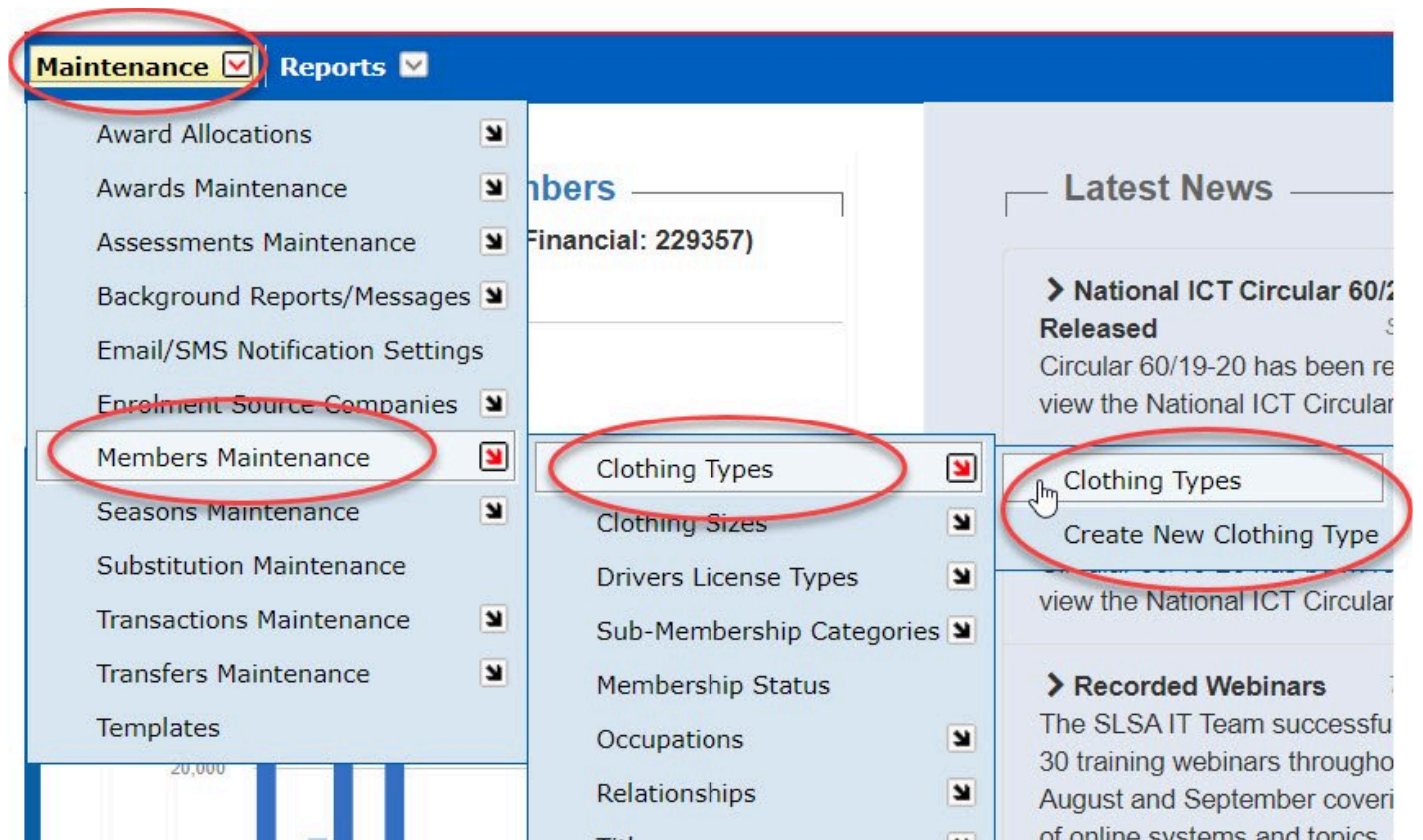
Assessment Request Status View @ Surf Life Saving Australia

Status	Options
Incomplete	<input type="button" value="Edit"/>
Awaiting Approval	<input type="button" value="Edit"/>
Approved	<input type="button" value="Edit"/>
Deleted	<input type="button" value="Edit"/>
Rejected	<input type="button" value="Edit"/>
Awaiting Candidate Approval	<input type="button" value="Edit"/>
Award Allocation	<input type="button" value="Edit"/>
Complete	<input type="button" value="Edit"/>

11.3.4 Member Maintenance

In the Member Maintenance, a number of sub menus exist for National Users to set the Surfguard parameters for fields that display in a persons membership profile such as clothing types, clothing sizes, sub-membership categories, drivers license information, occupations, titles etc.

Members Maintenance – Clothing Types



Currently there are four (4) Clothing Types set up. National Users can edit or add new Clothing Types. Once a new 'Clothing Type' is created this will be displayed in the Members Details View.

Messages Maintenance Reports

Clothing Types View @ Surf Life Saving Australia

Create New Clothing Type

Clothing Type	Options
Lycra Vest	View Edit Delete
Shirt	View Edit Delete
Short	View Edit Delete
Swimsuit	View Edit Delete

Total: 4

Members Maintenance – Clothing Sizes

The screenshot shows a web application interface with a blue header. On the left, there is a navigation menu under the 'Maintenance' tab. The menu items are: Award Allocations, Awards Maintenance, Assessments Maintenance, Background Reports/Messages, Email/SMS Notification Settings, Enrolment Source Companies, **Members Maintenance** (circled in red), Seasons Maintenance, Substitution Maintenance, Transactions Maintenance, Transfers Maintenance, and Templates. Below the menu is a bar chart with a value of 20,000. In the center, there is a section for 'Members' with a 'Financial: 229357' label. On the right, there is a 'Latest News' section with two news items: 'National ICT Circular 60 Released' and 'National ICT Circular 35'. Below the news is a 'Recorded Webinars' section. A secondary menu is open over the 'Members Maintenance' item, listing: Clothing Types, **Clothing Sizes** (circled in red), Drivers License Types, Sub-Membership Categories, Membership Status, Occupations, Relationships, and Titles. A sub-menu is open over the 'Clothing Sizes' item, listing 'Clothing Sizes' and 'Create New Clothing Size', both of which are circled in red.

Members Maintenance – Drivers License Types

The screenshot shows a web application interface with a blue header. On the left, there is a navigation menu under the 'Maintenance' and 'Reports' tabs. The 'Members Maintenance' option is highlighted with a red oval. A sub-menu is open for 'Members Maintenance', and the 'Drivers License Types' option is also highlighted with a red oval. A further sub-menu is open for 'Drivers License Types', showing the option 'Create New Drivers License Type' which is also highlighted with a red oval. The main content area on the right includes a 'Latest News' section with two news items: 'National ICT Circular 60/2019-20 Released' and 'National ICT Circular 35 / 2019-20 Released'. Below the navigation menu, there is a bar chart with a y-axis labeled '20,000'.

Drivers License Types View @ Surf Life Saving Australia

Filter Drivers License Types

Drivers License Type From: Drivers License Type To:

Drivers License Type	Options
Bus	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Car	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Motor Cycle	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
None	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Truck - Rigid	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Truck - Semi	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

Total: 6

Members Maintenance – Sub-Membership Categories

The screenshot shows a web application interface with a blue header. On the left, there is a 'Maintenance' menu with a dropdown arrow, containing items like 'Award Allocations', 'Awards Maintenance', 'Assessments Maintenance', 'Background Reports/Messages', 'Email/SMS Notification Settings', 'Enrolment Source Companies', 'Members Maintenance' (circled in red), 'Seasons Maintenance', 'Substitution Maintenance', 'Transactions Maintenance', 'Transfers Maintenance', and 'Templates'. Below this is a bar chart with a y-axis value of 20,000. In the center, there is a 'Members' section with a 'Financial: 229357' label. To the right of the 'Members Maintenance' item, a secondary menu is open, listing 'Clothing Types', 'Clothing Sizes', 'Drivers License Types', 'Sub-Membership Categories' (circled in red), 'Membership Status', 'Occupations', 'Relationships', and 'Titles'. On the far right, there is a 'Latest News' section with two news items: 'National ICT Circular 60/2019-2020 Released' (dated Sun 08/03/2020) and 'National ICT Circular 35 / 2019-20' (dated Thu 05/12/2019). Below the news items, there is a 'Sub-Membership Categories' section with a link 'Create New Sub-Membership Category' (circled in red).

Members Maintenance – Membership Status

Membership Status View @ Surf Life Saving Australia

Filter Membership Status

Membership Status Description From: Membership Status Description To:

Retrieve Membership Status

Status Description	Options
Active	View Edit
Archived	View Edit
Deceased	View Edit
Deleted	View Edit
Expelled	View Edit
Suspended	View Edit
Transferred Out	View Edit
Total: 7	

Members Maintenance – Occupations

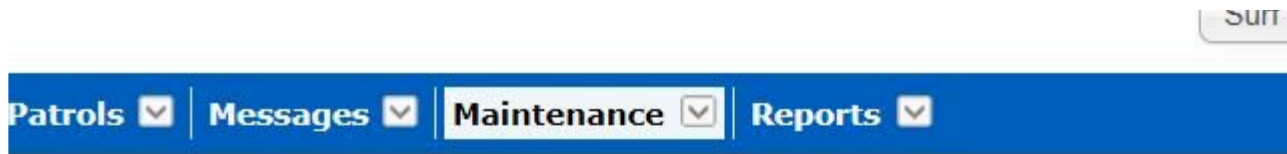
Users can view the Occupations listed in Surfguard by selecting the sub menu 'Members Maintenance – Occupations'

A list will be displayed whereby National users can view, edit or delete an Occupation.

These occupations are available in the surfguard member details section for selection.

Occupation:	SLSA National Office Staff
Home Address (E	
Building Name :	Security
Flat Or Unit Details:	Security Alarm Engineer
Street Number : *	Security Officer
Street Name : *	Self Employed
Suburb: *	Service Station Attendant
State: *	020
Country: *	▼
Returned Mail:	
Postal Address	Sheet Metal Worker
<input type="checkbox"/> Same as h	
Building Name:	Shipping Officer
Flat Or Unit Details:	Shoemaker
Street Number .**	Shop Assistant
Street Name: **	Shop Fitter
Delivery Postal Box : **	Shop Owner
Suburb: *	
State: *	020
Country: *	▼
Returned Mail:	SLSA National Office Staff

Users can add a new occupation to the list via the 'Members Maintenance – Occupations – Creat New Occupation'.



Add Occupation @ Surf Life Saving Australia

Occupation: *

Members Maintenance – Titles & Relationships

Users can view and or create the list of available Titles ie: Mr, Mrs or Relationship selections from this section of the Members Maintenance.

Select the sub-menu and view. Click on the options to edit or delete.

[▼](#) | [Patrols](#) [▼](#) | [Messages](#) [▼](#) | [Maintenance](#) [▼](#) | [Reports](#) [▼](#)

Relationships View @ Surf Life Saving Australia

Filter Relationships

Relationship From: **Relationship To:**

Relationship	Options		
Aunt	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Brother	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Brother-in-Law	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Cousin	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Daughter	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Daughter-in-Law	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Defacto	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Ex-Partner	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Father	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Father-in-Law	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Friend	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Grandfather	<input type="button" value="View"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

11.3.5 Season Maintenance

Season Maintenance – Season

National Users can set organisation date parameters for patrol, competition and registration seasons.

Using the filter options to find a specific organisation, National Users can edit or view information.

Organisation	Competition Season	Patrol Season	Registration Season	Options
Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	-	View Edit
Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	-	View Edit
Sydney Branch : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	-	View Edit
Bondi : Sydney Branch : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	01/07 - 30/06	View Edit
Bronte : Sydney Branch : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	01/07 - 30/06	View Edit
Burning Palms : Sydney Branch : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	01/07 - 30/06	View Edit
Clovelly : Sydney Branch : Surf Life Saving NSW : Surf Life Saving Australia	01/01 - 31/12	01/07 - 30/06	01/07 - 30/06	View Edit

11.3.6 Transaction Maintenance

The Transaction Maintenance section allows users to view a list of the default 'Transaction Type Names' that clubs can use to manage their transactions.

Management ▾ | Patrols ▾ | Messages ▾ | **Maintenance ▾** | Reports ▾

1

View Transaction Types @ Surf Life Saving Australia

Transaction Type Name	Options
Carnival entry fee	
Club key	
Course fee	
Donation	
Function	
Gym fee	
Invoice	
Joining Fee	
Levy	
Locker key	
Membership fee	
Merchandise	
Non fee paying member	
Other	
Special Event	
Training material/manuals	

2

3

Users can also 'Create New Transaction Type' by clicking on the 'new transaction' link.
Type in the new name for your Transaction Type and click on 'add transaction type'

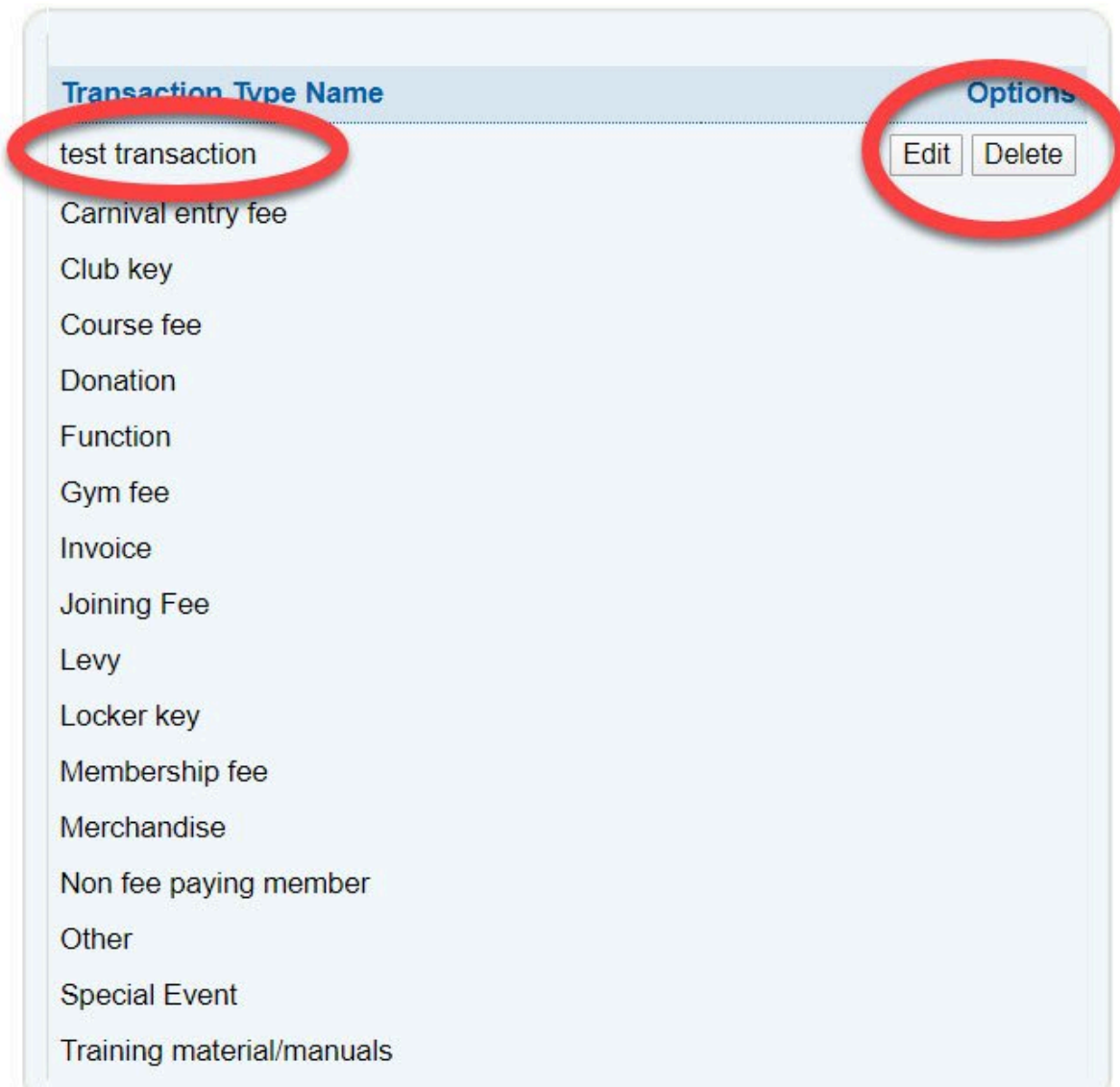
Add Transaction Type @ Surf Life Saving Australia

Transaction Type Details

Transaction Type Name: *

Users can edit or delete the transaction types that they have created however It's important to remember that you cannot delete a transaction type once members have transactions linked to it

View Transaction Types @ Surf Life Saving Australia



Transaction Type Name	Options
test transaction	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Carnival entry fee	
Club key	
Course fee	
Donation	
Function	
Gym fee	
Invoice	
Joining Fee	
Levy	
Locker key	
Membership fee	
Merchandise	
Non fee paying member	
Other	
Special Event	
Training material/manuals	

11.3.7 Transfer Maintenance

Transfer Maintenance

This section allows National Admin Users the ability to set the Transfer Status/descriptions such as New, Approved, Endorsed, Complete, Rejected, Not-endorsed, Refused, Archive.

[Personal Management](#) ▼ |
 [Patrols](#) ▼ |
 [Messages](#) ▼ |
 [Maintenance](#) ▼ |
 [Reports](#) ▼

Transfer Status View @ Surf Life Saving Australia

Filter Transfer Status

Transfer Status From:

Transfer Status To:

Retrieve Transfer Status

Status Description	Options	
Approved	View	Edit
Archive	View	Edit
Completed	View	Edit
Endorsed	View	Edit
New	View	Edit
Not Endorsed	View	Edit
Refused	View	Edit
Rejected	View	Edit

Total: 8

Within the Transfer Status View, click on the View or Edit Button to edit action tags relating to each Transfer step.

View Transfer Status @ Surf Life Saving Australia

Transfer Status:	Approved
Transfer is Active:	[x]

Action Tags (on buttons/links)

Action Tag - Next Highest Authority:	Approve
---	---------

Edit Transfer Status

Cancel

12. IRD

Incident reporting represents the recording of drowning, rescues, first aid etc. Data relating to the incident should be entered as near as possible in timing to the occurrence of the incident. Clubs, Branches and Other Services who require access to the IRD need to apply for access via the SLSA Form 49.

(Form 49 can be found on <https://help.sls.com.au>)

The following incidents need to be entered into the IRD:

- Drowning
- Near Drowning
- Resuscitation
- Member Injury
- Employee Injury
- Major First Aid (Spinal etc.)

* Note that this is only SLSA's minimum requirement for data entry and some states may have additional mandatory requirements — check with your state center if you're not sure. Data for other incident types is optional, but we strongly encourage the entry of all incidents, to give us the best possible dataset. Very minor incidents (minor first aid etc) are not required to be entered; however, you can enter them if you choose. States and branches should also pay special attention to entering all incidents resulting from their local carnivals, as well as state and branch championships.

12.1 Accessing Incident Database

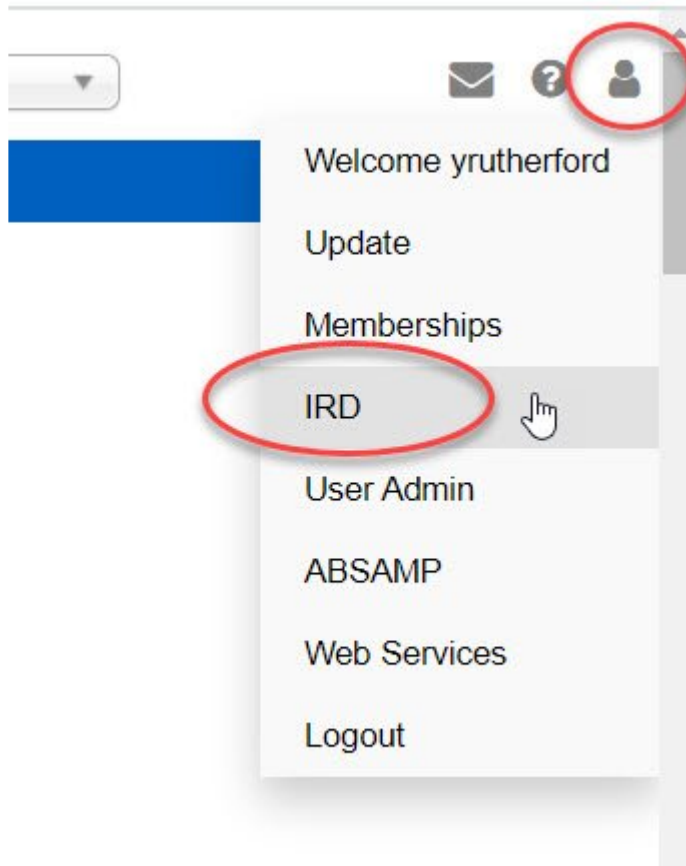
Before attempting to login to the Incident Database you must have a User Account set up on your behalf. This is done by completing the SLSA Form 49.

To access the form, go to <https://help.sls.com.au> – Forms – Form49

You need to log a ticket to the IT Helpdesk with your Form 49 for processing to get access to the Incident Report Database.

[Click Here](#)

Once you have logged on to SurfGuard, change the database name to IRD by selecting it from the Application list (see below).



12.2 Incident Reports

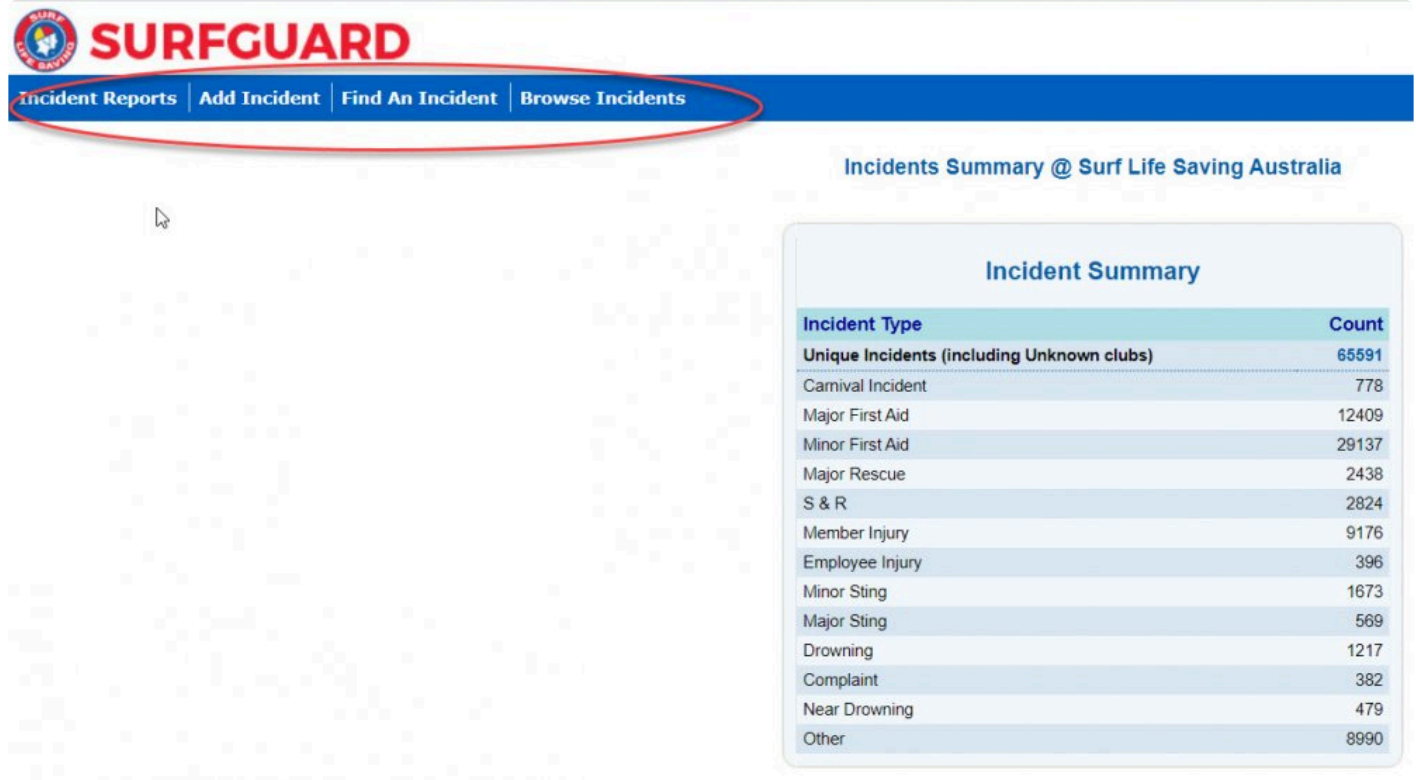
Incident reporting represents the recording of drowning, rescues, first aid etc. Data relating to the incident should be entered as near as possible in timing to the occurrence of the incident. The following incidents need to be entered into the IRD:

- Drowning
- Near Drowning
- Resuscitation
- Member Injury
- Employee Injury
- Major First Aid (Spinal etc.)

Note that this is only SLSA's minimum requirement for data entry and some states may have additional mandatory requirements — check with your state centre if you're not sure. Data for other incident types is optional, but we strongly encourage the entry of all incidents, to give us the best possible dataset. Very minor incidents (minor first aid etc) are not required to be entered; however you can enter them if you

choose. States and branches should also pay special attention to entering all incidents resulting from their local carnivals, as well as state and branch championships. The data entered is based upon the SLSA Incident report form (SLSA F161).

Upon accessing IRD a summary is displayed showing a statistical table of logged IRD reports for the Organisation.



Incident Type	Count
Unique Incidents (including Unknown clubs)	65591
Carnival Incident	778
Major First Aid	12409
Minor First Aid	29137
Major Rescue	2438
S & R	2824
Member Injury	9176
Employee Injury	396
Minor Sting	1673
Major Sting	569
Drowning	1217
Complaint	382
Near Drowning	479
Other	8990

Note: All data held within IRD has been collected over nearly 17 years and it is vital that the integrity of the data should be maintained. All data being entered or revised should be checked for accuracy before it is entered.

12.3 Add Incident

From the Menu tab – select 'Add Incident'.

The add incident area allows the user to input the required fields by following the order of the paper based Incident Report.

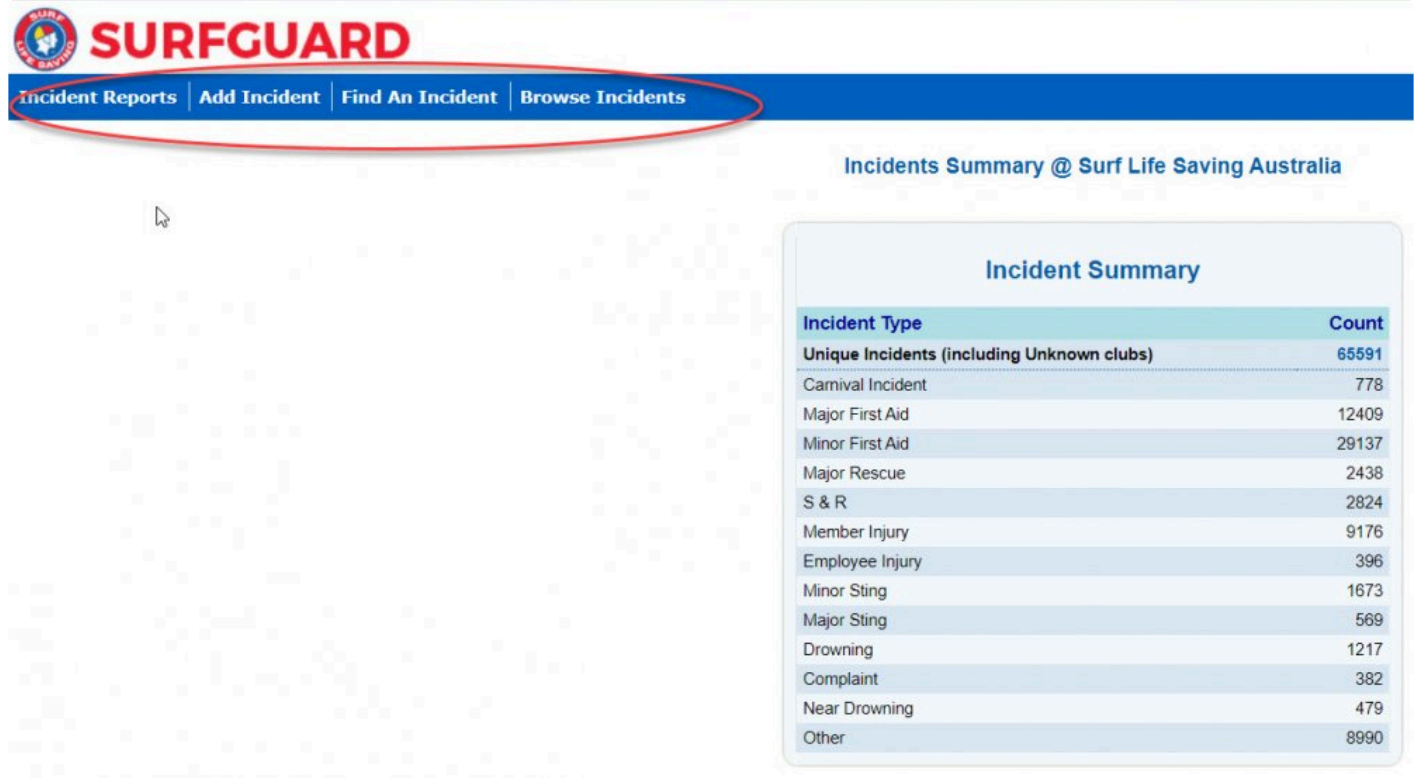
Those fields marked with a red * are mandatory.

For incidents where resuscitation was required, the CPR/Oxygen/Defib options must be chosen when completing the 'Initial Treatment' area.

This is necessary to allow you to complete the CPR/Oxygen report form.

12.4 Find Incident

Using the IRD menu tabs, select 'Find An Incident'



SURFGUARD

Incident Reports | Add Incident | **Find An Incident** | Browse Incidents

Incidents Summary @ Surf Life Saving Australia

Incident Summary	
Incident Type	Count
Unique Incidents (including Unknown clubs)	65591
Carnival Incident	778
Major First Aid	12409
Minor First Aid	29137
Major Rescue	2438
S & R	2824
Member Injury	9176
Employee Injury	396
Minor Sting	1673
Major Sting	569
Drowning	1217
Complaint	382
Near Drowning	479
Other	8990

Using the 'Selection Criteria' fields type in any information pertaining to the Incident that you wish to find such as Organisation, Date range or the Incident Number.

Click 'Find Incident'.

Find An Incident @ Surf Life Saving Australia

Selection Criteria

Club or Service: Surf Life Saving NSW

Exclude Unknown:

Period Start: 01/05/2019 (dd/mm/yyyy)

Period End: 01/10/2019 (dd/mm/yyyy)

Incident ID:

Incident Type: Any(All), Carnival Incident, Major First Aid, Minor First Aid

Find Incident(s)

12.5 Browse Incident

By clicking on the sub-menu tab – **Browse Incidents** the screen will display a list of all incidents listed for your Organisation.

Users have the options to view an incident by clicking on the Incident number or via the User Options can edit or delete.

Browse Incidents @ Surf Life Saving Australia

Incident Number	Club	Date	Time(if known)	Location	Incident Type(s)	User Options
96038	Toowoan Bay (Lifeguards)	2020-05-25	16:05:00	TOOWOON BAY	Other	Edit Delete
96032	FSC - Duty Officers	2020-05-24	13:30:00	LONG BEACH	Major First Aid	Edit Delete
96039	FNC - Duty Officers	2020-05-24	14:00:00	CABARITA	S & R	Edit Delete
96034	Freshwater	2020-05-24	17:18:00	FRESHWATER HEADLAND	Other	Edit Delete
96037	SNB - Duty Officers	2020-05-24	16:08:00	FRESHWATER	Other	Edit Delete
96028	Westpac Helicopter - Sydney Region	2020-05-23	12:05:00	DOBROYD HEAD	S & R	Edit Delete
96029	Trigg Beach (Lifeguards)	2020-05-23	07:55:00	BROKEN LEG	Minor First Aid	Edit Delete
96030	Umina	2020-05-23	16:18:00	PEARL BEACH	Other	Edit Delete
96035	HUN - Duty Officers	2020-05-23	10:33:00	SHOAL BAY WHARF	Other	Edit Delete
96036	HUN - Duty Officers	2020-05-23	09:32:00	FLY POINT	Other	Edit Delete
96023	Newport	2020-05-22	15:28:00	NEWPORT BEACH	Other	Edit Delete

13. ABSAMP

The Australian Beach Safety & Management Program (ABSAMP) was established in 1990 as a joint program between SLSA and the Coastal Studies Unit, University of Sydney.

ABSAMP is an ambitious project that aims to be the most comprehensive study ever undertaken on the beaches of any part of the world's coast. Detailed information on every beach in Australia has been amassed.

The main aims of the program are to:

- Develop a comprehensive, standardised and scientific information base on all Australian beaches with regard to their location, physical characteristics, access, facilities, usage, rescues, physical and biological hazards, and level of public risk under the various wave, tide and weather conditions.
- Expand and improve the management and safety services of all Australian beaches, and to assist other countries to develop similar programs

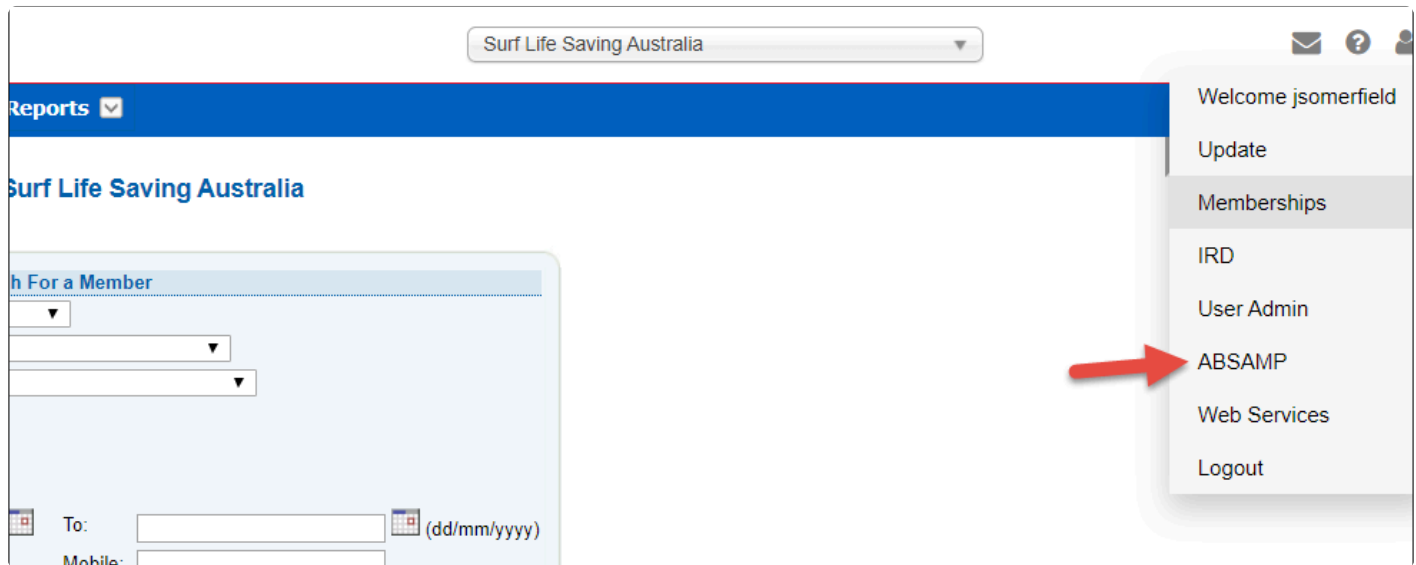
Data on each beach is acquired from a range of interrelated sources: topographic maps and aerial photographs, aerial and ground site inspections, beach conditions (produced on a daily basis by patrolling surf lifesavers filling in beach maps) and published data. All information is filed as a hard copy and all appropriate information then extracted for entry into the database.

13.1 Accessing ABSAMP

The ABSAMP database can be accessible in SurfGuard by selecting "ABSAMP" from the application list.



To access the ABSAMP tab within SurfGuard you need to fill in a Form 49 and have this form authorised.



13.2 Data Integrity

All data held within ABSAMP has been collected over nearly 20 years and it is vital that the integrity of the data should be maintained. All data being entered or revised should be checked for accuracy before it is entered. No data should be deleted without the approval of the Coastsafe Manager.

All data held within the ABSAMP database is owned by SLSA. No data, image or map should be passed on to a third party for research or commercial use without the permission of the Coastsafe Manager.

13.3 Data Access Policy

Responsibility

It is the responsibility of SLSA, through the National Manager Coastal Safety Services, to implement and maintain procedures to effectively manage and provide necessary access to ABSAMP Data, while at the same time ensuring the confidentiality, integrity, availability, accountability, and auditability of the information.

Use

Any individual granted access to ABSAMP Data is responsible for the ethical usage of that data. It will be used only in accordance with the authority delegated to the individual to conduct SLSA operations.

Data Access

The Responsible Officers will coordinate ABSAMP Data access nationally and for each SLSA State/Territory. The Responsible Officers will maintain records of Approved ABSAMP Data Users, and serve as

contact point for ABSAMP enquiries

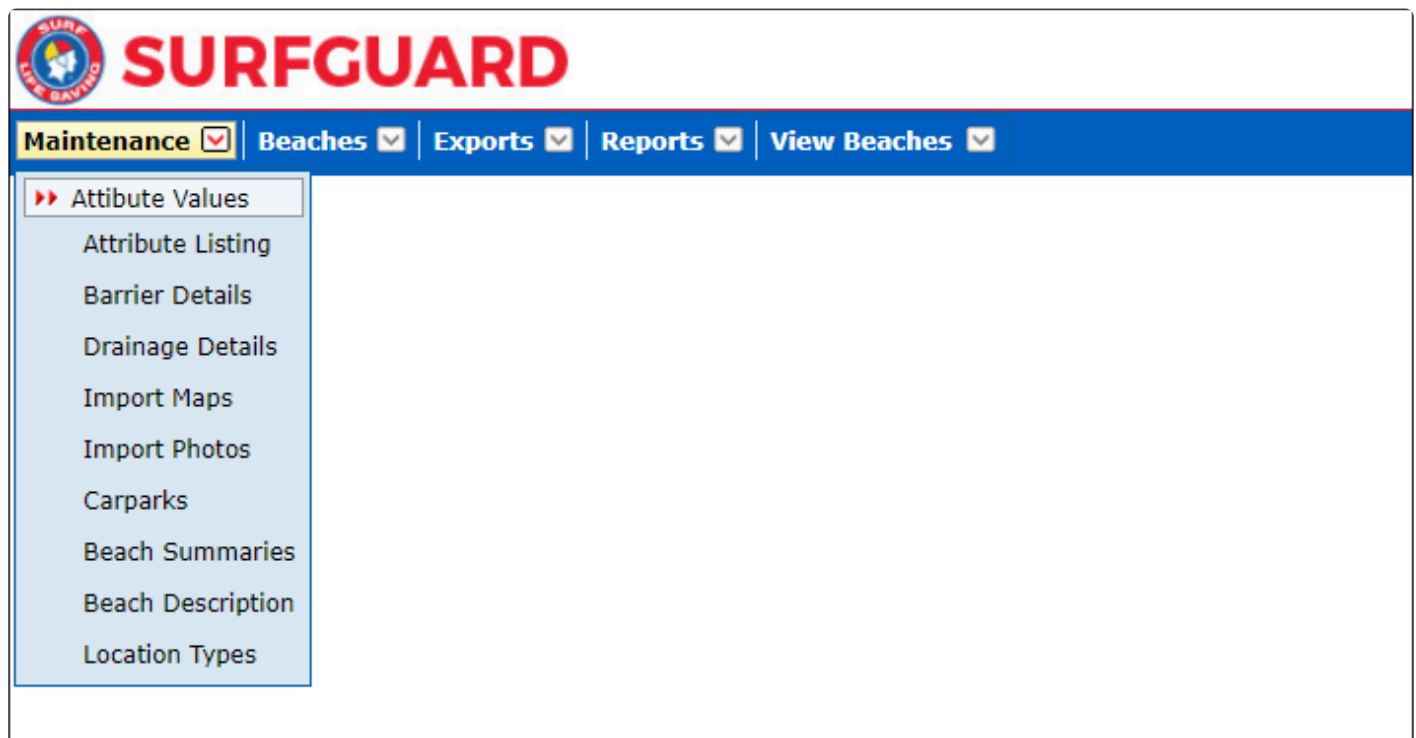
Compliance

Approved ABSAMP Data Users are expected to observe any restrictions that apply to sensitive data; and to abide by applicable laws, policies, procedures and guidelines with respect to access, use, or disclosure of information.

The unauthorised storage, disclosure or distribution of ABSAMP Data in any medium, except as required by an employee's job responsibilities is expressly forbidden, as is the access or use of any ABSAMP Data for one's own personal gain or profit, for the personal gain or profit of others, or to satisfy one's personal curiosity or that of others

13.4 Maintenance

The maintenance functions are managed via the 'maintenance' menu. From this menu the parameters relating to a field or a file can be added, changed or removed.



The screenshot displays the SURFGUARD web application interface. At the top left is the SURF LIFE SAVING logo. The main header features the word "SURFGUARD" in large red letters. Below the header is a blue navigation bar with several menu items: "Maintenance" (highlighted with a yellow background and a dropdown arrow), "Beaches", "Exports", "Reports", and "View Beaches", each with a dropdown arrow. A dropdown menu is open under "Maintenance", listing the following options: "Attribute Values" (with a red double arrow icon), "Attribute Listing", "Barrier Details", "Drainage Details", "Import Maps", "Import Photos", "Carparks", "Beach Summaries", "Beach Description", and "Location Types".

13.5 Attribute Values

Attribute values allow the Administrator to add a new attribute and to sequence the attribute (order) so that it

appears on the screen in the correct place. Click the 'Modify' button to change the sequence of an attribute.

ABSAMP Attribute Maintenance

Total Attributes for this Type: 34

Attribute Type:

Explanation:

Attributes List

Attribute:

Sequence:

Attribute Name	Display Sequence	Action
Swimming	1	<input type="button" value="Modify"/>
Board riding	2	<input type="button" value="Modify"/>
Wind surfing	3	<input type="button" value="Modify"/>
Kite surfing	4	<input type="button" value="Modify"/>
PWCs	5	<input type="button" value="Modify"/>
Recreational boating	6	<input type="button" value="Modify"/>
Commercial boating	7	<input type="button" value="Modify"/>
Aquaculture	8	<input type="button" value="Modify"/>
Snorkelling	9	<input type="button" value="Modify"/>
SCUBA	10	<input type="button" value="Modify"/>
Beach fishing	11	<input type="button" value="Modify"/>
Rock fishing	12	<input type="button" value="Modify"/>
Jetty fishing	13	<input type="button" value="Modify"/>
Spear fishing	14	<input type="button" value="Modify"/>
Rock walking	15	<input type="button" value="Modify"/>
Jogging	16	<input type="button" value="Modify"/>
Cycling	17	<input type="button" value="Modify"/>
Rollerblade	18	<input type="button" value="Modify"/>
Skateboard	19	<input type="button" value="Modify"/>
Dog walking	20	<input type="button" value="Modify"/>
Volleyball	21	<input type="button" value="Modify"/>
4WD	22	<input type="button" value="Modify"/>
Other	23	<input type="button" value="Modify"/>
Personal Training	24	<input type="button" value="Modify"/>

13.6 Attribute Listing

The attribute listing generates a report that lists all fields and their attributes. To create the report click the generate button. The output will show the list of attributes for each area of ABSAMP.

13.7 Beach Barrier

The Beach Barrier maintenance screen allows a user to Find, delete or add a new barrier and to change the characteristic of a barrier type. Click the relevant button to perform this task.

ABSAMP Beach Barrier Maintenance

Total Number of barriers: 2693

Barrier Key: Barrier Name:

State: Island:

Holocene: Pleistocene: Back barrier saltflats width (m):

Vegetation:

Barrier Type:

Barrier Usage:

Back Barrier Type:

Comments:

Barrier Characteristics

Barrier Characteristics: Value:

Barrier Characteristics	Value	Action
Orientation (deg)	51.00	<input type="button" value="Delete"/>
Minimum width (?)	100.00	<input type="button" value="Delete"/>
Maximum width (?)	250.00	<input type="button" value="Delete"/>
Length (?)	0.63	<input type="button" value="Delete"/>
Total area (?)	0.75	<input type="button" value="Delete"/>
Stable area (?)	0.75	<input type="button" value="Delete"/>
Mean height (?)	5.00	<input type="button" value="Delete"/>
Maximum height (?)	10.00	<input type="button" value="Delete"/>

13.8 Beach Drainage

The beach Drainage maintenance allows a user to Find, Delete or Create a beach drainage attribute for a particular key. Click the relevant button to use this functionality.

ABSAMP Beach Drainage Maintenance

Total number of Drainages: 2501

Drainage Key: Drainage Name:

State: <input type="text" value="NSW"/> Drainage Type: <input type="text" value="River"/> Estuary Type: <input type="text" value="barrier estuary"/> Intel Name: <input type="text"/> Intel Stability: <input type="text"/> Intel Mouth: <input type="text" value="open"/> Drainage Trained: <input checked="" type="checkbox"/> On Headland: <input type="checkbox"/> Lagoon: <input type="checkbox"/> Comments: <input type="text" value="Tweed river, boundary of beaches 1 & 2, training walls."/>	Island: <input type="text"/> Wetland Area (Ha): <input type="text" value="0.00"/> Estuary Maturity: <input type="text" value="mature (totally infilled)"/> Intel Width (m): <input type="text" value="0.00"/> Intel Depth (m): <input type="text" value="0.00"/> Lagoon Name: <input type="text"/>
--	--

13.9 Import Maps

This feature will allow the user to import a map as an image into ABSAMP and connect it to a particular beach. To perform this function, enter the map reference information and the map type. Click the Browse button and browse to where the file location of the map is stored and select it. The map image should appear once the map has been uploaded.

ABSAMP Beach Map Maintenance

Total number of maps: 0

Map Code:

Reference No.:

Reference Name:

Map Type:


Scale: 1 :

Map Date:
 (dd/mm/yyyy)

Description:

File Name:

No file chosen



13.10 Adding and Deleting Photos

Adding Photos

NOTE: Photos can only be uploaded if they have a minimum width of 700 and a maximum of 1300. The ideal width is 1000. If the new image has to be resized open the image up in “paint”. When you have it opened in Paint

1. click Resize
2. tick the Pixels also
3. tick Maintain aspect ratio.
4. Change the Horizontal to 1000 and

5. click OK.

Step 1 – Uploading A Photo in ABSAMP

1. Click Maintenance > Import Photos (the most recent photo will appear)
2. Click “New Photo” (Failing to do this will replace the “current” photo if you save)
3. Click “Choose File”, update the details (Typical settings are Photo Type : Ground, Scale 1:1, current date)
4. Click “Save”


Step 2 – Attaching a Photo to a Beach to Display in Beachsafe

1. Click “Beaches” from the main menu
2. Click “General Details”
3. Clear the Beach Key and Beach Name (they both default to “delete”) and type your Beach key into the Beach Key field, click “Find Beach”. Use caution using “Beach Name to “search” as duplicate beach names do exist (e.g. Sorrento WA vs Sorrento Vic).
4. On the lower right-hand side of the page, click “Attach Photos”
5. Click “View New Photos” then click “Select Photo”. Uses the drop-down arrow, the photos are named images/yyyy-mm-dd followed by a timestamp and the original file name.
6. Display Sequence: If you only have one photo for that beach, put in 1; if you have more than one photo for that beach, update “Display Sequence” with the sequence number for that photo (e.g. 3).
7. Click Attach Photo
8. Once you have uploaded new photos they either update overnight or if it is urgent you can [log a support ticket](#) with the SLSA IT Helpdesk including the name of the beach & beach key and we can do a forced update.

ABSAMP Beach Photo Maintenance

Item has been successfully updated.

No. of Photos loaded: 14917

<p>Photo Code: <input type="text" value="images/2019-07-24-1"/></p> <p>Reference No.: <input type="text"/></p> <p>Photo Type: <input type="text" value="Ground"/></p> <p>Scale: 1 : <input type="text" value="1"/></p> <p>Photo Date: <input type="text" value="17/01/2018"/> </p> <p style="font-size: small;">(dd/mm/yyyy)</p> <p>Description: <input style="width: 100%; height: 80px;" type="text"/></p>	<p>File Name:</p> <p><input type="button" value="Choose File"/> No file chosen</p> <div style="text-align: center;">  </div> <p style="text-align: center;"> <input type="button" value="Delete Photo"/> <input type="button" value="New Photo"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </p>
--	--

Deleting Photos from a Beach

The following steps will enable you to remove photos from a beach

1. Click on the “Beaches” tab in the drop-down select “General Details”
2. Enter the beach key or beach name and click Find Beach
3. Scroll down to the bottom and on Right Hand Side (RHS) click “Attach Photo”
4. From the “Select Photo” drop-down find the photo you don’t want
5. Scroll down to the bottom and select “Detach Photo”

13.11 Beach Summaries


The beach summary maintenance area will allow the user to display, update, delete and create summary descriptions. Click the appropriate box to achieve this.

These summaries relate to swimming, surfing, fishing, and general.

ABSAMP Summaries Sets Maintenance

No. of Summaries Sets defined: 0

Set Name:

Swimming: 

Surfing:

Fishing:

General:

13.12 Beach Description

The beach description maintenance area will allow the user to display, update, delete and create beach descriptions. Click the appropriate box to achieve this.

ABSAMP Beach Description Maintenance

No. of Beach Descriptions defined: 1

Description Name:

Description:

13.13 Beaches

The beaches area of ABSAMP is where all detail is held on a particular beach.

To search for beach information delete the beach key and beach name and enter your known information. This information will be reused when you click other beaches functions.

Note: When adding a new beach you will need to create the beach and then in the MAINTENANCE area create the summaries, carparks and other features and attach them to this beach.

13.14 Exports

The export function allows users to select any number of combinations of fields and export them as a variety of outputs.

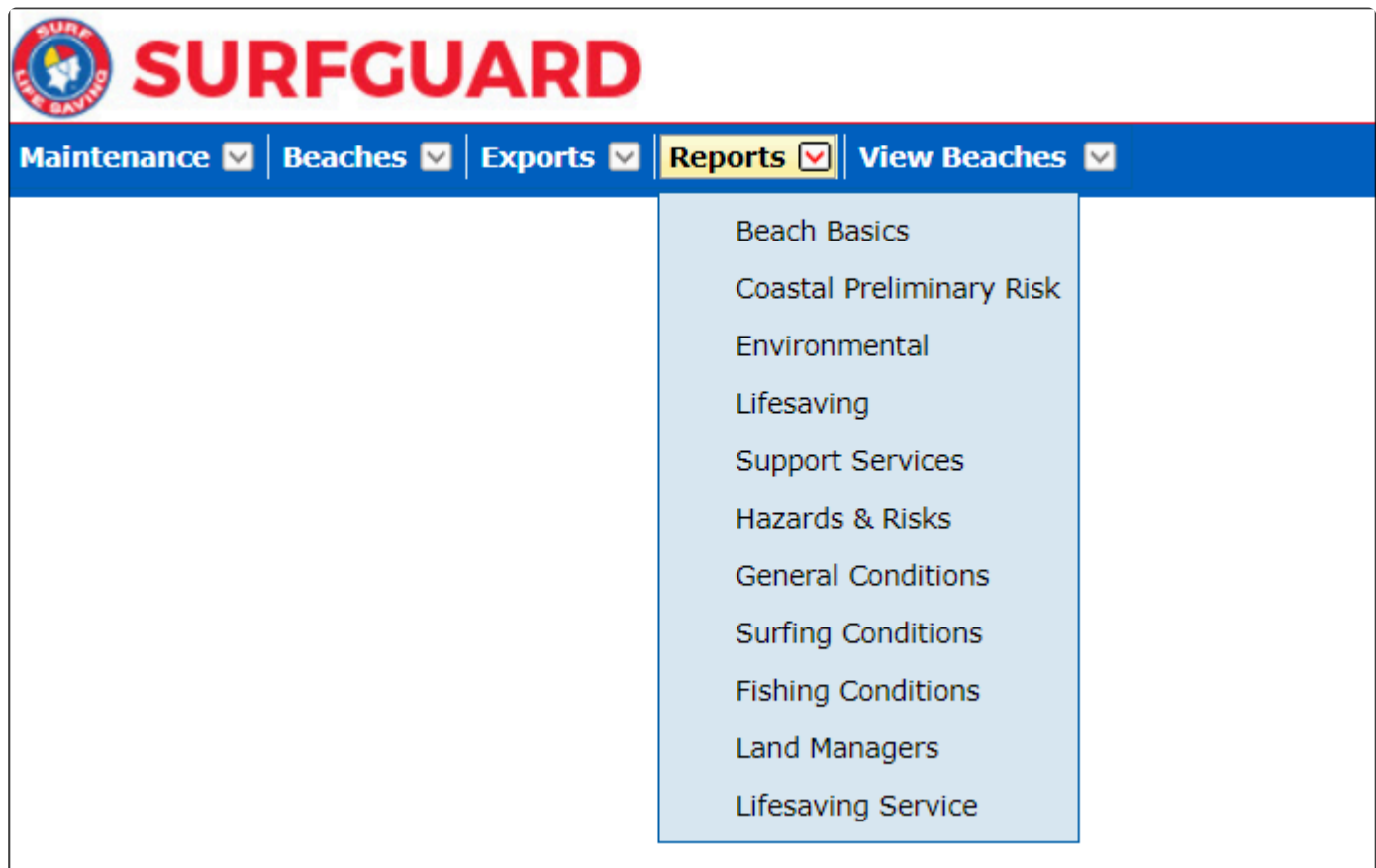
Each area is expandable by clicking the relevant button as shown below.

Name the report and once the export file is created, select the location where it is to be saved.

* Note: Permission must be sought before any exported information is used by any person other than SLSA staff.

13.14 Reports

The reports area allows users to run a series of pre-setup reports and display them to a screen for printing. Reports selection shows the list of reports.



The screenshot displays the SURFGUARD web application interface. At the top left is the SURF LIFE SAVING logo. The main header features the word "SURFGUARD" in large red letters. Below the header is a blue navigation bar with several menu items, each with a dropdown arrow: "Maintenance", "Beaches", "Exports", "Reports", and "View Beaches". The "Reports" menu is currently selected and expanded, showing a list of report categories: Beach Basics, Coastal Preliminary Risk, Environmental, Lifesaving, Support Services, Hazards & Risks, General Conditions, Surfing Conditions, Fishing Conditions, Land Managers, and Lifesaving Service.