



# Surf Life Saving Australia SurfGuard User Manual

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Version 2.0



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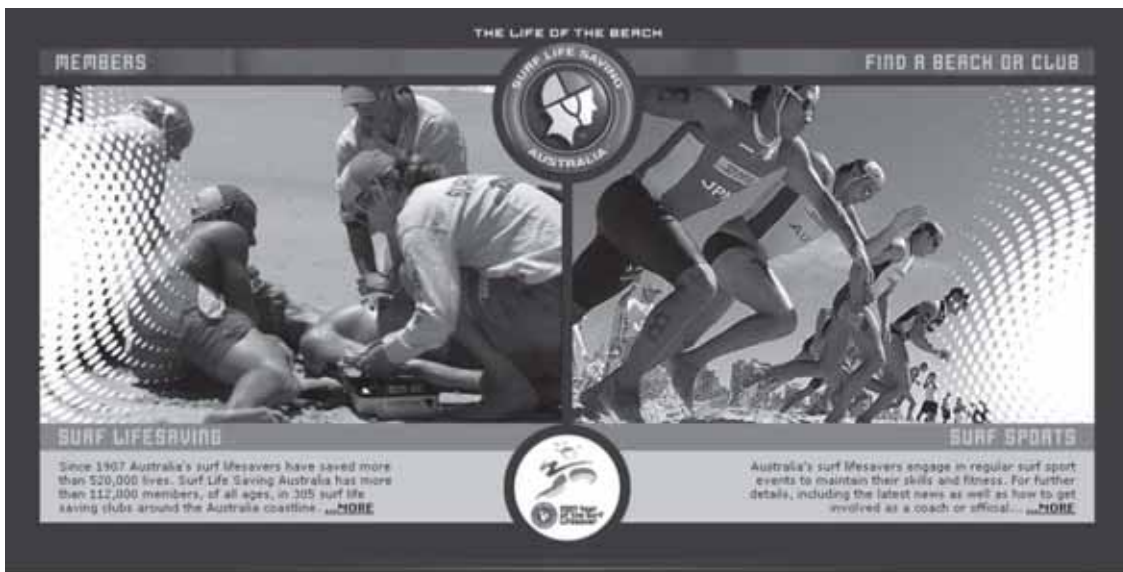


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## PART 1: SURFGUARD USERS — CLUBS

### 1. Introduction



**Figure 1.1:** SLSA Home Page

#### 1.1. About SurfGuard

The SurfGuard national membership and club administration database has undergone a phased process of implementation around Australia. SurfGuard is a new, fully web-based front-end that has been built for the database, using open, international web standards, and conforming to the Surf Life Saving Australia (SLSA) Information Technology (IT) Strategic Plan. SurfGuard caters for around 350 User Groups and contains details on over 300,000 individual members

What this means is that the entire system, source code and all, is owned by Surf Life Saving Australia. It also means that data sharing and management will be much more streamlined and efficient and also users will be able to access the system from any computer connected to the internet

#### 1.2. How to use this book

The purpose of this User Guide is two-fold. It is both designed as a training resource for those undertaking training in Club administration, and a reference tool for those already involved in Club, Branch or State administration.



This User Guide is divided into multiple sections, each focusing on the purpose and use of a separate section of the SurfGuard software. It follows the same order as the content presented on the SurfGuard site (i.e.: Summary, Members, Assessments, Transfers, Organisational Management, Patrols, Mailing Groups, Messages, and Reports). All examples refer to the 'Playpen' environment and are based on Club-level access. Each section concludes with a summary, which includes 'tips'.

### 1.3. Registration information

Before attempting to login to SurfGuard, you must have a User Account set up on your behalf. This is done by completing the SurfGuard Registration/User Administration form (SLSA F049), which can be downloaded via the 'Admin and Resources' page of the Members section of the SLSA website. The completed form must be returned to the SurfGuard Manager at SLSA. Further information and assistance can be obtained from the SurfGuard Manager via email at: [surfguardhelp@slsa.asn.au](mailto:surfguardhelp@slsa.asn.au)

When you apply for a User login you can choose from Edit or Browse, as well as from the multiple databases available — Membership, IRD, ABSAMP and so on. Users should be clear about what access is appropriate. Check with your Club Administrator for more information.

### 1.4. Logon instructions

The SurfGuard Entry Point is found by navigating from the Home Page of the Surf Life Saving Australia website, as shown in Figure 1.1 ([www.slsa.asn.au](http://www.slsa.asn.au)), via the Members access point in the top left-hand side of your screen. Then go to the 'Members' tab and drill down to the 'Information Technology' section. You will then notice the SurfGuard introduction at the top of the left side column. Click on the 'read more' prompt to access the 'Login Point'. Once you are at the SurfGuard Entry Point screen, you will need to enter your Username and Password, as shown in Figure 1.2. To make logging in quicker next time, consider saving this screen to your favourites



## SurfGuard Entry Point

A screenshot of the SurfGuard login interface. It features a central form with a grey header bar containing the text "Enter login information:". Below this, there are two input fields: "User Name: \*" and "Password: \*". Under the password field is a link that reads "[Forgot my Password - generate new one?](#)". At the bottom of the form are two buttons: "Login" and "Clear".

Enter login information:

User Name: \*

Password: \*

[Forgot my Password - generate new one?](#)

Login Clear

**Figure 1.2:** SurfGuard Login Screen

### 1.5. Messages

You will notice that the SurfGuard Entry Point screen also displays any messages. This includes messages to all SurfGuard users about system updates and other important messages. An example is shown at Figure 1.3.

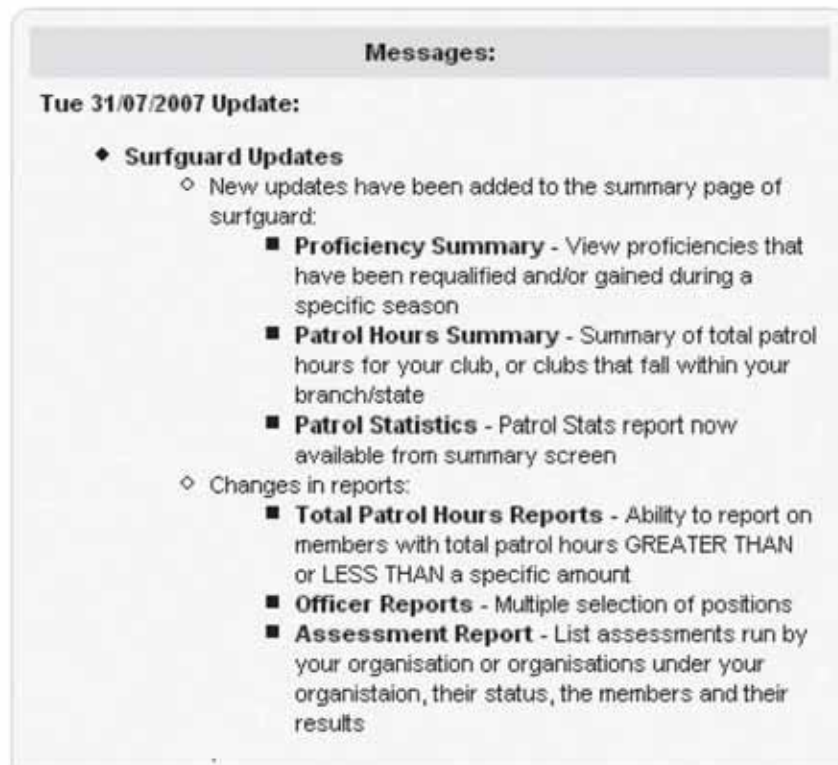


Figure 1.3: Message displayed on the Login Screen

## 1.6. SurfGuard Help Desk

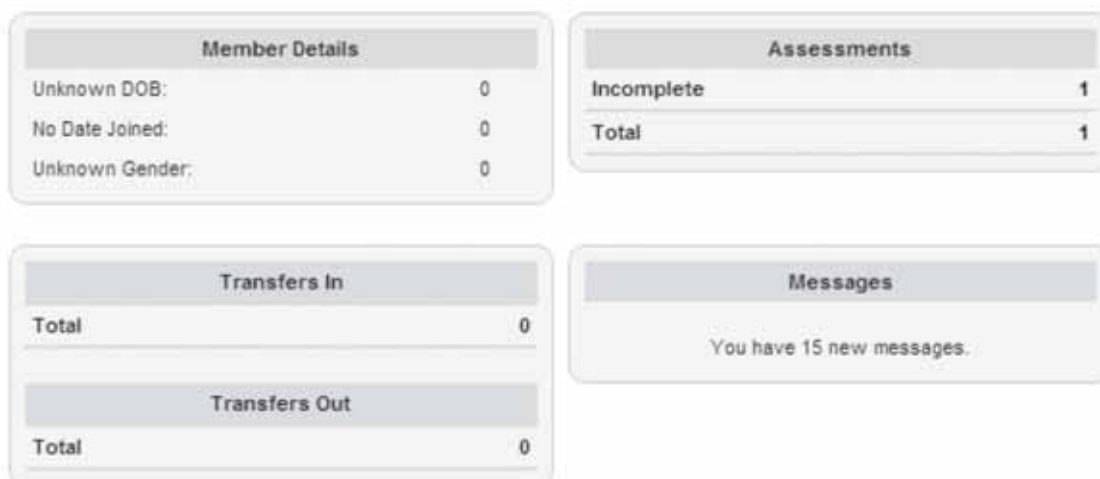
If you experience any difficulties when trying to login or when using SurfGuard, call the SurfGuard Helpdesk on 1300 724 006 or email: [surfguardhelp@slsa.asn.au](mailto:surfguardhelp@slsa.asn.au). The Help Desk is staffed weekdays from 9 am to 5 pm EST. Once you are logged on to SurfGuard you can access the 'Help Desk' and 'Frequently Asked Questions' at any time.

## 1.7. Navigating SurfGuard

Once you have logged onto SurfGuard, you will automatically be taken to the 'Memberships@' summary screen (see Figure 1.4). A summary of outstanding tasks including membership updates, assessments, transfers and messages are listed on this screen. Further information about accessing, creating and sending messages is in Section 9



### Memberships @ Test NSW Club



**Figure 1.4:** The 'Memberships' summary screen is displayed after login.

You will notice that there are two navigation bars at the top of the screen (under the SurfGuard banner). The top navigation bar indicates your current status on the SurfGuard site, in terms of what organisation you are viewing, the administrative environment you are within and the application or database that you are accessing, as well as your registered username.

Your SurfGuard user account is set-up to give you relevant access to the national membership and club administration database. If you are a registered club user you will have access to your club's information. This is indicated in the organisation area of the toolbar — your club name will be available in the drop-down list. Likewise, branch and state registered users can select any club from their branch or state from the drop-down list to view information for that club.

Another feature of SurfGuard is the ability to 'practice' within the Playpen environment, using real (but not live) data. When you select the Playpen environment, any changes you make will not be saved to the national database. Regular users should ensure they use the production environment when updating the national database. The application area indicates which part of the national database you are working within. For example, Figure 1.5 shows that the user is logged into the Surf Life Saving Australia Organisation; the Playpen Environment; and the Memberships Application.

The Playpen area can be accessed via the drop-down menu where the domain 'Environment' is shown. This area is used by Club and Branch Administrators, and other Managers, who want to test changes before they are implemented into production. If you would like Playpen access, ensure you specify this on your Registration form (SLSA F049).

The lower navigation bar, or Main Menu, allows you to access different functions within SurfGuard. These options are referred to as the Main Menu items. Sub-menu items are indicated by a down-arrow to the right of the Main Menu item. For example, you can add



a new club member by rolling your cursor over the Members item and clicking on the Add Member tab.

The Third Line Menu includes a short-cut to the SurfGuard home page. Depending on your level of access, this will take you to the 'Memberships@' page. By clicking on the 'Help Desk' link, a new window opens up giving you the relevant contact details. Both the 'Suggestion Box' and 'Report a Bug' links will initiate an email to the Help Desk.

You will also notice that clicking on some links opens a new window in your Internet Browser. This new window can be closed, without affecting your login status to the main program, by clicking on the red 'X' in the top right-hand corner of the window.

## 1.8. Logging off

When you have finished using SurfGuard, click on the 'Log Off' link to end the session (as seen in Figure 1.5). The 'Log Off SurfGuard' screen will then be displayed (as per Figure 1.6), indicating that your session has been ended. When you have finished using SurfGuard, click on the 'Log Off' link to end the session.

### Log Off SurfGuard

**You have successfully logged off.**

Click [here](#) to re-login.

## 1.9. Data integrity

As a database, SurfGuard is only as good as the quality of the data loaded into it by users. It is a good idea to check that you have spelt and punctuated member and place names correctly, as this will affect the accuracy of the information upon which your Club relies. Data entry should be checked before it is submitted and rechecked when renewal forms or other data is being entered. Wherever possible, ensure that all Fields are filled out on template forms and that you check regularly for duplicated member records.

## 1.10. SurfGuard security

The SurfGuard database security is setup 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. Where a State has no Branches, all Clubs are entered in the 'Misc Branches' for that State.

As this User Guide is structured to follow the layout of the SurfGuard interface, it is suggested that new users read the Guide whilst also viewing the site online. To save time, add the SurfGuard Entry Point page to your favourites.

Those with Club access can only see their own Club data and the membership details of their Club. Membership types, data entry screens and the processes required to enter data follow the SLSA Regulations and Policies all of which can be found at [www.slsa.com.au](http://www.slsa.com.au)

Changes to these screens need to be nominated through each State and agreed to by all States before they are implemented. This may cause some delay in suggestions being implemented. It is also important to note that your Club Administrator can change or create permissions for people within that entity (i.e.: Club or Branch) and they can also create logins as required.

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. 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.

## Tips

To log on to SurfGuard: enter your registered username, enter your password.

SurfGuard is a web based application that allows members, clubs, branches and state groups of Surf Life Saving Australia to access the national membership and club administration database. It also provides information to members of the public who are participating in SLSA Activities.

Information about SurfGuard registration can be obtained from the SurfGuard manager ([surfguardhelp@slsa.asn.au](mailto:surfguardhelp@slsa.asn.au)). The registration form can be downloaded from the website.

The SurfGuard help desk can be contacted on phone 1300 724 006 or via email at: [surfguardhelp@slsa.asn.au](mailto:surfguardhelp@slsa.asn.au)

To find SurfGuard on the SLSA website: go to [www.slsa.asn.au](http://www.slsa.asn.au), click on members, click on Information Technology, click on 'read more' under the 'SurfGuard – National membership Database' item, at the Logon Point, click on the link to the SurfGuard logon screen.



## 2. Summary

### 2.1. 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 page is a quickly accessible outline of all SurfGuard areas including awards, patrols and the breakdown of your memberships. The Summary information available is grouped into categories; these being: Assessment Requests, Awards, Membership, Patrols, Proficiencies and Transfers.

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.

"**Display Statistics**" under the Summary Menu will display a variety of statistics in a graphical format. It is aimed at organisations that would like to display these statistics to the public in their foyer on a large screen. The user can specify the image refresh rate.

### 2.2. Displaying summaries

To display a summary select from the options in one or more of the fields in the top panel and click on the 'Go' button or press 'Enter' on your keyboard (see Figure 2.1). You can sort the data to be displayed in the summary by including or excluding non-financial members or by including or excluding proficiency assessments by clicking on the check box for that option.

**Test NSW Club Summary Details**

Display: Membership Categories Season: 2006

include non-financial members       include proficiency assessments

Membership Categories				
Category	Total Members	Male Members	Female Members	Unknown Gender
Probationary	4	4	0	0
Active (16yrs and over)	2	1	1	0
Academy (Non-Members)	1	1	0	0
<b>Total</b>	<b>7</b>	<b>6</b>	<b>1</b>	<b>0</b>

**Figure 2.1:** Create a Summary using the drop-down 'Display'



## 2.3. Assessment Request Summary

The Assessment Requests Summary is sorted based on two assessment types: Awards and Proficiencies. Data can be viewed based on a variety of award types and their status or level of completion. There are a number of 'Status' categories, including the following.

**Incomplete:** The assessment has not been submitted for approval to branch or state. The club is still able to modify any of the assessment details.

**Awaiting Approval:** The assessment has been submitted for approval to branch or state. This step is skipped for proficiencies.

**Exam Approved:** The assessment has been approved by the branch or state. The assessment results can now be processed.

**Exam Rejected:** The assessment has been rejected by the branch or state. The assessment will not take place and this entry can now be archived. A new Assessment Request should be created once the issue has been resolved.

**Exam Cancelled:** The assessment has been deleted. An assessment can be deleted by Branch or State at any stage before the award is allocated. A Club can only cancel/delete an assessment before it is submitted for approval to Branch or State.

**Awaiting Candidate Approval:** The results have been entered for the members. Branch or state needs to approve the results and may also amend any of the results.

**Award Allocation:** The issuing authority (State or National) will grant an award/qualification once the paperwork is checked. The award will then appear against the member's name.

To see the detail of outstanding assessment requests, click on the 'Incomplete' link. This will take you to the Assessment Request screen. From this screen you can perform a number of actions, including modifying, cancelling or submitting the request, depending on your access level.



### Test NSW Club Summary Details

Display:  Season:

Include non-financial members  Include proficiency assessments

---

**Assessment Requests**

<b>Test NSW Club</b>	<b>1</b>
Incomplete	1

**Figure 2.2:** Assessment Request List showing optional search fields

## 2.4. Awards Summary

There are two types of Awards Summaries available. The first — ‘Awards: by Current Membership Location’ provides a list of all new awards and proficiencies held by members of your club or that fall within clubs in your branch, state for the selected season. The second option is ‘Awards: Originating FROM This Club’ and lists new awards that members have gained from your club specifically or a club within your branch, state for the selected season.

When viewing the ‘Awards: by Current Membership Location’ report, by clicking on 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 on the ‘Awards’ link next to 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. As an example you may have the option of checking to view archived members in your list.



### Test NSW Club Summary Details

Display: Awards: originating FROM this club Season: 2002

Go

Award	Total	Male	Female	Unknown
Advanced Resuscitation Certificate	2	2	0	0
Bronze Medallion	40	30	10	0
IRB Crew Certificate	11	10	1	0
Senior First Aid Certificate	1	1	0	0
Silver Medallion IRB Driver	12	12	0	0
Surf Awareness One	44	15	29	0
Surf Awareness Two	23	11	12	0
Surf Rescue Certificate	25	19	6	0
Surf Safety One	25	18	7	0
Surf Smart One	47	19	28	0
Surf Smart Two	31	17	14	0
Training Officer Bronze Medallion	2	1	1	0
Training Officer Resuscitation	1	1	0	0
<b>Total</b>	<b>264</b>	<b>156</b>	<b>108</b>	<b>0</b>

**Figure 2.3: Awards Summary Details**

## 2.5. DEST Report – Printed Certificates/Statements

The 'DEST Report – Printed Certificates/Statements' is the Department of Education, Schools and training quarterly report. Each state is required to report on the award certificates/statements it has issued. It totals the printed certificates – not the awards allocated – during the selected quarter. Re-prints are not included in the totals. The following items are totalled:

- Certificates to Members
- Certificates to Non-Members
- Statements of Attainment to Members
- Statements of Attainment to Non-Members
- AQTF Certificates to Members
- AQTF Certificates to Non-Members
- Total Issued for the quarter
- Total Issued for the current Financial Year to Date

## 2.6. Membership categories summary

The Membership Categories Summary is a list of all the club's members sorted based on their membership category. Membership categories follow the SLSA Regulations and



Policies, which can be found at [www.slsa.com.au](http://www.slsa.com.au)

The following membership categories are used:

Junior Activity Member (5-13 years)

Cadet Member (13-15 years)

Active (15-18 years)

Active (18 years and over)

Reserve Active

Probationary

Associate

Award Member

Long Service

Life member

Honorary

General

Academy (Non-Members)

## 2.7. Patrols summary

'Patrol Hours — Top Members' will display the top ten members based on the total to date of their patrol hours for a given season. 'Patrol Hours - Organisations' will display the total patrol hours for the given club or clubs within a branch, state. A Patrol statistics summary is also available which will output a clubs total patrol statistics for a given season.

## 2.8. Proficiencies Summary

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

## 2.9. Transfers Summary

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 for organising member transfers easily between your club and other clubs.



## Tips

Change the summary view by using the drop down 'Display' menu.

View season data by changing the year in the 'Season' field.

Create a summary by selecting from the options in one or more of the fields in the top panel and click on the 'Go' button or press 'enter' on your keyboard.

## Summary

The Summary information available is grouped into the following categories:

- assessment requests
- awards
- membership
- patrols
- transfers



## 3. Members

### 3.1. Members

The 'Members' tab allows you to access member information and process membership changes. The Members section of the database is divided into the following categories:

- Find Member
- Add Member
- List Members
- Bulk Processing

### 3.2. Find Member

Searching for a member in SurfGuard is very easy. Simply go to the 'Find Member' sub-menu screen and enter the member's details such as first name, surname and (if known) member ID number, and then click on the 'Submit' button.

Data can be further sorted using the options listed on the screen. A green 'tick' will appear when you click on a box. 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. 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 are required when searching for active or archived members

#### Find Member @ Surf Life Saving Australia

A screenshot of the 'Find Member' search screen. The title is 'Search For a Member'. It contains input fields for 'Member ID:', 'First Name:' (with 'david' entered), and 'Last Name:' (with 'smith' entered). Below these are five checkboxes: 'Include active records' (checked), 'Include archived records' (checked), 'Include suspended records' (unchecked), 'Include deceased records' (unchecked), and 'Check this to search on part of name' (checked). At the bottom are 'Reset' and 'Submit' buttons.

**Figure 3.1:** Find Member search screen

You can then view a range of member details from the resulting list. You can view the full details for a member by clicking on the relevant link. For example, click on the 'View' link to access an individual member's details (as shown in Figure 3.2).



Members @ Test NSW Club

Criteria: Status: Active

MemberID	Surname	First Name	DOB	Club	Registered Season	Status	Contact Number	User Options
4447823	Blackwood	Billy	12 Mar 1973	Test NSW Club		Active		View Edit Transaction
4263832	Border	Alan	15 Oct 1965	Test NSW Club	2006 - 2007	Active		View Edit Transaction Patrols
4263834	bradman	mark	12 Jul 1956	Test NSW Club	2006 - 2007	Active		View Edit Transaction Patrols
4443605	hoskins	bob	18 Jan 1983	Test NSW Club		Active		View Edit Transaction Patrols
4263836	johnson	magic	06 May 1967	Test NSW Club	2006 - 2007	Active		View Edit Transaction
4447824	mandpeeboog	james	11 May 1956	Test NSW Club	2006 - 2007	Active		View Edit Transaction
4079340	O'brien	Belinda	28 Jan 1991	Test NSW Club	2004 - 2005	Active		View Edit Transaction Patrols

Page: 1  
Total Records: 7

Figure 3.2: Member's list in the Test NSW Club

### 3.3. Add member

You can simply add a member by clicking on the 'Add Member' sub-menu button. You can then add all an individual's details using the drop-down option lists on this screen (as shown in Figure 3.3). A red asterisks (\*) 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. These criteria help identify individual sets of data within SurfGuard. By clicking on the 'Check for Duplicates' button, you can search the database for similar entries using these four mandatory fields. A member's occupation will automatically default to "Student" if the member is aged up to 16 years old.

For example, if two family members with the same name join the same Club, they will be differentiated by their respective dates of birth.

### 3.4. List members

The members list view contains a list of all Active club's member's status. From this screen you can view or edit each individual member's record or complete transactions or patrol details pertaining to individual members (see Figure 3.4). It should be noted that, where the Club List runs onto a second page, you can access the next screen by clicking on 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 on the member links.

**Avoca Beach: Add Member Details**

Reset Submit Cancel

<p><b>General Details</b></p> <p>Title: <input type="text" value="Unknown"/></p> <p>First Name: <input type="text"/></p> <p>Middle Name: <input type="text"/></p> <p>Last Name: <input type="text"/></p> <p>Preferred Name: <input type="text"/></p> <p>Gender: <input type="radio"/> Male <input type="radio"/> Female</p> <p>Date of birth: <input type="text" value="dd/mm/yyyy"/> <a href="#">Check for duplicates</a></p> <p>Occupation: <input type="text" value="Not Supplied"/></p> <p><b>Home Address</b></p> <p>Street &amp; Number: <input type="text"/></p> <p>Suburb: <input type="text"/></p> <p>State: <input type="text" value="NSW"/> Postcode: <input type="text"/></p> <p>Country: <input type="text" value="Australia"/></p> <p><b>Postal Address</b></p> <p><input type="checkbox"/> Same as home address</p> <p>Street &amp; Number: <input type="text"/></p> <p>Suburb: <input type="text"/></p> <p>State: <input type="text" value="NSW"/> Postcode: <input type="text"/></p> <p>Country: <input type="text" value="Australia"/></p> <p><b>Phone Numbers</b></p> <p>Home: <input type="text"/> H/Fax: <input type="text"/></p> <p>Business: <input type="text"/> B/Fax: <input type="text"/></p> <p>Alternate: <input type="text"/> Mobile: <input type="text"/></p> <p>Preferred No: <input type="text"/> <input type="text" value="Mobile Phone"/></p> <p><b>Email Addresses</b></p> <p>Email Address 1: <input type="text"/></p> <p>Email Address 2: <input type="text"/></p> <p><b>Other Details</b></p> <p>Notes: <input type="text"/></p> <p>Drivers License Type: <input type="text" value="None"/></p> <p>Drivers License Number: <input type="text"/></p> <p>License Expiry Date: <input type="text" value="dd/mm/yyyy"/></p> <p>Marine License Number: <input type="text"/></p> <p>Marine License Expiry Date: <input type="text" value="dd/mm/yyyy"/></p> <p>Shirt Size: <input type="text"/></p> <p>Short Size: <input type="text"/></p>	<p><b>Organisation Membership Details</b></p> <p>Organization: <input type="text" value="Avoca Beach"/></p> <p>Membership Category: <input type="text" value="Probationary"/></p> <p>Date Joined: <input type="text" value="dd/mm/yyyy"/></p> <p>Membership Status: <input type="text" value="Active"/></p> <p>Registered for Season: <input type="text"/></p> <p>Register for Season: <input type="text" value="Previous"/> <input type="text" value="Current"/> <input type="text" value="Next"/></p> <p>Competitive rights: <input type="radio"/> Yes <input type="radio"/> No</p> <p>Locker No: <input type="text"/></p> <p>Club Keys: <input type="text"/></p> <p><b>Member Protection</b></p> <p>Member Protection Form: <input type="checkbox"/> Completed</p> <p>Member Protection Date: <input type="text" value="dd/mm/yyyy"/></p> <p>Member Protection Registration No: <input type="text"/></p> <p>Member Protection Registration Date: <input type="text" value="dd/mm/yyyy"/></p> <p><b>Member Verification</b></p> <p>Member Verification ID Sited: <input type="checkbox"/></p> <p>Member Verification ID Sited Date: <input type="text" value="dd/mm/yyyy"/></p> <p>Member Verification ID Type: <input type="text"/></p> <p>Member Verification ID Number: <input type="text"/></p> <p><b>Medical Details</b></p> <p>Registered Asthmatic: <input type="radio"/> Yes <input type="radio"/> No</p> <p>Organ Donor: <input type="radio"/> Yes <input type="radio"/> No</p> <p>Blood Type: <input type="text"/></p> <p>Medical Notes: <input type="text"/></p> <p>Hepatitis B Vaccination: <input type="radio"/> Yes <input type="radio"/> No</p> <p>Vaccination Club &amp; Date: <input type="text"/></p> <p><b>Emergency Contact Details</b></p> <p><input type="checkbox"/> Prefill with member info</p> <p>Title: <input type="text" value="Unknown"/></p> <p>First Name: <input type="text"/></p> <p>Middle Name: <input type="text"/></p> <p>Last Name: <input type="text"/></p> <p>Relationship: <input type="text" value="Unknown"/></p> <p><b>Emergency Contact Home Address</b></p> <p>Street &amp; Number: <input type="text"/></p> <p>Suburb: <input type="text"/></p> <p>State: <input type="text" value="NSW"/> Postcode: <input type="text"/></p> <p>Country: <input type="text" value="Australia"/></p> <p><b>Emergency Contact Numbers</b></p> <p>Home Phone: <input type="text"/> Home Fax: <input type="text"/></p> <p>Business Phone: <input type="text"/> Business Fax: <input type="text"/></p> <p>Alternate Phone: <input type="text"/> Mobile Phone: <input type="text"/></p>	<p><b>Enrolment Background Details</b></p> <p>Cultural Background: <input type="text"/></p> <p>Second Language: <input type="text"/></p> <p>Aboriginal: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Torres Strait Islander: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Country of Birth: <input type="text"/></p> <p>Country of Citizenship: <input type="text"/></p> <p>English Spoken: <input type="text"/></p> <p>Highest School Level: <input type="text"/></p> <p>Year Completed School: <input type="text"/></p> <p>Still Attending School: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Previous Qualifications:</p> <p><input type="checkbox"/> Trade</p> <p><input type="checkbox"/> Advanced/Technician Certificate</p> <p><input type="checkbox"/> Undergraduate Diploma</p> <p><input type="checkbox"/> Associate Diploma</p> <p><input type="checkbox"/> Degree or Postgraduate Diploma</p> <p><input type="checkbox"/> Other</p> <p>Previous Qualification Details: <input type="text"/></p> <p>Employment Status: <input type="text"/></p> <p>Disabilities:</p> <p><input type="checkbox"/> Hearing/Deaf</p> <p><input type="checkbox"/> Physical</p> <p><input type="checkbox"/> Learning</p> <p><input type="checkbox"/> Mental Illness</p> <p><input type="checkbox"/> Visual/Sight</p> <p><input type="checkbox"/> Intellectual</p> <p><input type="checkbox"/> Other</p> <p><input type="checkbox"/> Acquired Brain Impairment</p> <p><input type="checkbox"/> Medical Condition</p> <p><input type="checkbox"/> Unspecified</p> <p><b>Enrolment Source Details</b></p> <p>Enrolment Source Type: <input type="text"/></p> <p>Source Company Name: <input type="text"/></p> <p><a href="#">New Company</a> <a href="#">Refresh List</a></p> <p><b>Internal Memberships</b></p> <p>Ladies Aux. Assoc. <input type="text"/></p> <p>Gym Member <input type="text"/></p> <p><b>Mailing Groups</b></p> <p><input type="text"/></p> <p><b>Member Links</b></p>
--	--	---

Reset Submit Cancel

Figure 3.3 Add Members details screen



### 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									
Member ID	Surname	First Name	DOB	Organisation	Registered Season	Status	Membership Category	Contact Number	User Options
4447823	Blackwood	Billy	12/03/1973	Test NSW Club		Active	Probationary		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Transaction</a>
4263832	Border	Allan	15/10/1965	Test NSW Club	2007 - 2008	Active	Active (18yrs and over)		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Transaction</a> <a href="#">Patrols</a>
4263834	bradman	mark	12/07/1956	Test NSW Club	2006 - 2007	Active	Probationary		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Transaction</a> <a href="#">Patrols</a>
4443605	hoskins	bob	18/01/1983	Test NSW Club		Active	Academy (Non-Members)		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Transaction</a> <a href="#">Patrols</a>
4263836	johnson	magic	06/05/1967	Test NSW Club	2006 - 2007	Active	Probationary		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Transaction</a>
4079340	O'brien	Belinda	28/01/1991	Test NSW Club	2004 - 2005	Active	Active (18yrs and over)		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Transaction</a> <a href="#">Patrols</a>

**Criteria:** Status: Active.

**Page:** 1  
**Total Records:** 6

Figure 3.4 List Members Screen

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.

## 3.5. Bulk Processing

You can easily process a number of club members at once by using the 'Bulk Processing' sub-menu. This will allow you to carry out a number of administrative processes: activate members, archive members, register members for the current season or previous season and a number of other options. More functions will be added to this feature over time.

Once you have selected a processing type from the drop-down option list, you need to select the relevant State, Branch and Club if need be. Then you can highlight members by clicking on their name and using the arrow to transfer members from the Available Members list to the Selected Members list.

The quickest way to add names to the Selected Members list is by holding the Control button down on you keyboard (it is marked with the letters "Ctrl") and clicking on a number of names. This will highlight a number of members at once

You will be prompted before being allowing 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 on the 'Reset' button at the bottom of the form.



### Bulk Processing for Test NSW Club

Process Type:

Renewal Season:

Available Members:	Selected Members: *
Blackwood, Billy (4447823) 12/03/1973 - bradman, mark (4263834) 12/07/1956 - 2006/2007 hoskins, bob (4443605) 18/01/1983 - johnson, magic (4263836) 06/05/1967 - 2006/2007 O'Brien, Belinda (4079340) 28/01/1991 - 2004/2005	

5 members available.

Figure 3.5: Bulk Processing screen



## Tips

Go to the 'Find Member' sub-menu screen and enter the member's details such as first name, surname and member ID number, and then click on 'Submit' button.

Click on the 'Add Member' sub-menu button. Add all an individual's details using the drop down option lists on this screen. A red asterisks indicates fields that must be completed.

The quickest way to add names to the 'Selected Members' list in the Bulk Processing screen is by holding the Control button down on your keyboard.

The 'Members' tab allows you to access member information and process membership changes.

## Summary

The Members section of the database is divided into the following categories:

- Find Member
- Add Member
- List Member
- Bulk Processing



## 4. Assessments

### 4.1. Assessments

The Assessments menu allows users to view current or past assessments or to enter new assessment information. Users can only add, edit and view information for which they have access.

### 4.2. Assessment Request List

By clicking on the sub-menu item 'Assessment Request List', you can view all assessment requests that fall within your club, branch or state. (See Figure 4.1). Select from the drop-down options to short-list the specific assessments.

Assessment Request List @ Test NSW Club

[Help]

Assessment Status:	All Assessment Status	Assessment Type:	All Assessment Types
Award Type:	All Awards Types	Award:	All Awards
Assessment Date - From:	01/07/2005	Assessment Date - To:	30/06/2005

Test NSW Club						
Award/Qualification/UOC	Type	Organisation	Date	Status	Action	
View Form 14 Advanced Resuscitation Certificate	Award	Test NSW Club	16/04/2007 12:00	Incomplete	<input type="button" value="Submit"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Print Attendance Sheet"/>	

Total: 1 assessment(s).

Total: 1 organisation(s).

**Figure 4.1:** Assessment Request screen

Once you have added a new assessment request, you will notice that it appears in the Assessment Request List.

When an assessment has a status of 'Incomplete', you are given a chance to make any changes before you submit into the system, The 'Update' button allows the assessment request to be changed. If you click on the 'Delete' button, you will be prompted to confirm that you want to delete the assessment request.

Once you have clicked the 'Submit' button for an 'Incomplete' assessment, a window will appear confirming that the information has been submitted for approval by your Branch or State. Alternatively, if the assessment is a proficiency, you will be prompted to process results once you have submitted, as approval is not needed.



When asked to ‘process results’, you can now confirm members results by putting a tick next to each member who successfully completed the assessment. For some awards, a Pool Time or Activity Time will be displayed. Members results can be recorded in the format “*Hours : Minutes : Seconds*”. The results are then sent to your Branch or State for approval. The status of your assessment at this stage becomes ‘Awaiting Candidate Approval’. After an assessment’s results have been approved, Assessments of Award type, will move to ‘Award No allocation’ status, in which your State will allocate the awards to the successful members. For Proficiency assessments, once the assessment is approved by your Branch or State, the member’s award will be updated with the new proficiency information.

Throughout the assessment process, By clicking on the ‘Print Attendance Sheet’ button, you can view, save and/or print a PDF file which lists all the attendees for the specified course. You can also use the “Form 14” link to generate a pre-filled form 14 for the assessment. Note: Only assessments of Award type can have a form 14 generated.

Once an assessment has been completed it will move to a status of ‘Completed’.

Please note that only States can archive Award assessments since they need to do extra processing upon receiving notification from Clubs and Branches (such as printing of certificates, etc). Once Archived, an assessments status will be ‘Archived’ and can be viewed by selecting Archived in the Assessment Status: option in figure 4.1.

### 4.3. New Assessment Requests

By clicking on the sub-menu item ‘New Assessment Request’, you can create an assessment record for club members. (See Figure 4.2). You can select assessment specifics by choosing from the various drop-down options. Select from available club members by clicking on a name and using the add arrow ( > ).

Only members who are not in another incomplete assessment request for the award or proficiency will be listed in the available candidates list. Age and award pre-requisite restrictions are also implemented. To view the prerequisites for an award use the ‘**Reference: Awards**’ report in the reports area of SurfGuard. Minimum and maximum ages are calculated as of 30 September of the current registration season or as of the current date if past 30 September. There is also a 2 month leeway for age restrictions, so a member that turns the correct age in less than two months will appear on the candidate list.

For an assessment of Award type, only members who do not hold the award will appear as potential candidates. For an assessment of Proficiency type, candidates will only appear if they hold the relevant award. The only exception to this belongs to a small percentage of awards that are Proficiency only. This means that the member does not need to hold the award prior to gaining it, even though it is a proficiency type assessment. Some Awards that fall into this category are:

Junior Competition Skill Evaluation  
Junior Participation Skill Evaluation



Note: if candidates or assessors do not appear in your list then please check the **‘Reference: Awards’** report in the reports area of SurfGuard. This report lists all the information about each award and will provide information about award prerequisites, age requirements etc.

When entering assessor information you are required to enter at least part of their name or their member ID in order for the search to commence. If an assessor does not appear in the list then they do not hold the required award to be an assessor for the selected award. To check assessor award requirements please check the **‘Reference: Awards’** report in the reports area of SurfGuard.

Once you click ‘save’ you will be prompted to confirm that you want to add the assessment request. By clicking ‘OK’, the assessment request is lodged in the SurfGuard system.



New: Assessment Request @ Test NSW Club

[Help]

**Assessment Details**

Assessment Type: \*

Date: \*  (dd/mm/yyyy)

Time (24hr) \*  :

**Award Details**

Award Type:

Award:

Equivalent Award:

Allocate/Update Equivalent Award:

Do Not Allocate SLSA Award to Public Members:

**Units of Competency**

Available:

Selected:

**Contact Information**

Contact Name:

Contact Number:

Document Location:

**Assessor/Comments**

Assessor:   Click the Get Assessors button to retrieve a list of qualified assessors.

Comments:

**Candidates:**

Click the Get Candidates button to retrieve a list of candidates that full the prerequisites.

Available:

Selected:

Figure 4.2: New Assessment Request screen



It is important to note that there are two main types of assessments. These are 'Award' and 'Proficiency'. When adding a new assessment of award type, candidates will only be returned who do not hold the specific award. Awards are allocated upon successful completion of an assessment; where as, a proficiency is allocated whenever a member successfully re-qualifies for an award they already hold. In this case, the member's award record is updated with the proficiency date.

In addition to these two types of assessment, a member can also be assessed via 'Credit Transfer' or 'Recognition of Current Competence/Prior Learning'. Credit Transfer refers to an assessment that is conducted elsewhere but results in the allocation of a Surf Lifesaving Award; where as, Recognition refers to the acceptance of previous training or experience as equivalent to the award allocated.

### **Tips**

Click on 'Assessment Request List' to view all assessment requests for your club, branch or state.

Click on 'New Assessment Request' to create an assessment record. Select assessment specifics by choosing from the various drop-down options.

### **Summary**

The Assessment menu allows users to view pending assessments or to enter new assessment requests. Users can only add, edit or view information for which they have administrative access.

An 'Award' is gained against a member's record upon successful completion of an assessment.

'Proficiency' is allocated whenever a member successfully re-qualifies for an award they already hold.



## 5. Transfers

### 5.1. Transfer types

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, however they are keeping 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 however still retaining their membership at their original club as a non-competitor. This will give the member Dual Membership at one or more clubs.

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 on the 'Incoming' or 'Outgoing' links you can view a full list of the relevant members

The screenshot shows a web interface titled "Membership Transfer Request List @ Test NSW Club". At the top, there are two buttons: "New Transfer In" and "New Transfer Out". Below these are two search filters: "type:" with a dropdown menu set to "Competition rights", and "Status:" with a dropdown menu set to "All". The main area contains a table with columns for "ID", "NAME", "EMAIL", "PHONE", "ADDRESS", "CITY", "POSTCODE", "STATE", "COUNTRY", "CLUB", "TRANSFER DATE", "TRANSFER TYPE", and "STATUS". The table is currently empty. At the bottom, there are two more buttons: "New Transfer In" and "New Transfer Out".

**Figure 5.1:** Membership Transfer Request List screen

From this screen you can perform a number of actions, including approving or rejecting each transfer request if your access allows. As an example, once you click on the 'Endorse' or 'Reject' links you are taken to a screen that displays the individual's details and allows you to action the transfer request by clicking on the 'Submit' button.

You can obtain further information about a member by clicking on their member ID number. This will take you to a summary page regarding that member's transfer. You



can also view the contact details for the winning or losing club and their respective branch and state by clicking on the club name. The summary information can also be sorted using filters contained in the drop-down options. Further information about the Transfer Summary can be obtained by clicking on the 'Help' link.

In the example below, the selected summary is for Transfers into the Central Coast Branch of Avoca Beach (Figure 5.2 below).

Transfer In								
ID	Member ID	Name	Winning Club	Losing Club	Transfer Type	Age	Status	Action
<a href="#">88</a>	123456	Smith Billy	Avoca Beach	North Avoca	Complete	754 days	Endorsed	Approve Reject
<a href="#">821</a>	789012	Doe Jane	Avoca Beach	MacMasters	Complete	657 days	Endorsed	Approve Reject
<a href="#">741</a>	345678	Hudson Rock	Avoca Beach	Terrigal	Complete	572 days	Endorsed	Approve Reject

**Figure 5.2: Transfer Summary Details for the Avoca Beach Club**

## 5.2. Transfer Request Status

There are several types of Transfer Requests that can be used, as follows:

**New:** Transfer has been submitted and is waiting for the losing club to Endorse or Not Endorse the transfer.

**Endorsed:** Transfer has been Endorsed and is waiting for Branch or State to Approve it.

**Approved:** Transfer has been approved by state or branch and is ready for the winning club to complete it. When the winning club hits the 'Complete' link, this is when the transfer actually occurs and the member gets transferred.

**Rejected:** This means the transfer has been rejected by the branch/state user.

**Not Endorsed:** The transfer has not been endorsed by the losing club, but it can still be endorsed by the branch/state. However, if a branch/state approves in affect, is endorsing the transfer for the club. To carry out the wishes of the club, branch/state should reject the transfer.

## 5.3. Transfers In/Out

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 in can be seen below in figure 5.3.



The process involves selecting the club that the member is coming from and then entering their details as 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 however you are selecting a member from your club instead of another club.

#### Membership Transfer Request Into Test NSW Club

**Losing Club**

**State:**

**Branch:**

**Club:**

---

**Enter either member ID or full name**

**Member ID:**

**First Name:**

**Last Name:**

---

**Figure 5.3:** Transfer In screen



## Tips

Use the 'Membership Transfer Request' screen to initiate or track a member transfer.

Choose from the drop-down options and click on the 'New Transfer In' or 'New Transfer Out' links.

## Summary

The three types of transfers are:

Complete

Non-competition rights

Competition rights

The types of 'Transfer Requests' include:

New

Endorsed

Approved

Rejected

Not Endorsed



## 6. Organisational Management

### 6.1. 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. Users can only 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 (see Figure 6.1).

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.

You can upload a logo by clicking on the 'Browse' button. This will allow you to select a suitable graphic file from the computer drive of your choice. Graphics should be in either in jpeg or png format.



**Club Details: Test NSW Club**

No image Surf Life Saving NSW : Test NSW Branch

General Details		Physical Address	
Display Name:	<input type="text"/>	Street & No:	<input type="text" value="1 Pacific Ave"/>
ABN:	<input type="text" value="99123456789"/>	Suburb:	<input type="text" value="Eura Beach"/>
History:	<input type="text" value="This is a very big Surf Lifesaving Club"/>	State:	<input type="text" value="NSW"/>
Upload Logo:	<input type="text"/> <input type="button" value="Browse"/>	Post Code:	<input type="text" value="2468"/>
Colour:	<input type="text" value="Bronze"/>	Postal Address	
Local Gov. Area:	<input type="text" value="Shellharbour"/>	Street & No:	<input type="text"/>
Map Reference:	<input type="text" value="UBD Wollongong p48 G"/>	Suburb:	<input type="text" value="Eura Beach"/>
Office Phone:	<input type="text" value="0235782458"/>	State:	<input type="text" value="NSW"/>
Office Fax:	<input type="text" value="0234567890"/>	Post Code:	<input type="text" value="2468"/>
Email:	<input type="text" value="info@testclub.com"/>	Contact	
Website:	<input type="text" value="www.testclub.com"/>	Name:	<input type="text" value="Albert Adamson, President"/>
Entity Phone:	<input type="text"/>	Phone:	<input type="text" value="0235783579"/>
Entity Fax:	<input type="text"/>	Mobile:	<input type="text" value="0405060700"/>

**Figure 6.1:** Organisational Details edit screen



## 6.2. 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, patrol details and contact information. Click on the relevant link to edit each section of the Profile (see Figure 6.2).

**Service Profiles @ Test NSW Club**

Date Period	Service Hours	<a href="#">Edit</a> <a href="#">Delete</a>
01 Jan - 01 May	Monday - Friday:	08:00 - 18:00
	Saturdays:	08:00 - 18:00
	Sunday/Public Holidays:	08:00 - 18:00
Date Period	Service Hours	<a href="#">Edit</a> <a href="#">Delete</a>
01 Jun - 01 Jun	Monday - Friday:	08:00 - 16:00
	Saturdays:	08:00 - 16:00
	Sunday/Public Holidays:	08:00 - 16:00
<a href="#">Add Patrol Profile</a>		

**Patrol Area**

**Description:** Patrol Team 1

**Additional Patrol Periods (outside of listed times):**

[Edit Details](#)

**Contacts**

[Add Contact](#)

**Figure 6.2:** Service Profiles screen

## 6.3. 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 chairperson, secretary, treasurer and members by completing the 'Add Committee Details' (see Figure 6.3).

To view an existing committee, simply click on the 'Name' link. You can view a list of all the committee's members by clicking on the 'Members' button, and change the composition of a committee by clicking on the 'Edit' Button.



To remove the committee from the database, click on the 'Delete' button. By clicking on the committee member's name, you can view their individual member details.

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

**Committees @ Surf Life Saving NSW**

**Add Committee Details**

Name:

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

Positions:

Type:  Committee  Board

Name	Type	User Options
abcd	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Surfguard Users	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
test	Committee	<input type="button" value="Members"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

**Figure 6.3:** Adding or Viewing a Committee

## 6.4. 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, etc (see Figure 6.4).

To add a new category of internal membership, use the sub-sub-menu option or click on 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 membership category (see Figure 6.4).



### Internal Memberships @ Test NSW Club

Internal Membership Category	Display Order	User Options
Gym	1	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

**Figure 6.4:** Internal Membership screen

### Add New Internal Membership @ Test NSW Club

Intl Membership Category: \*

Display Order:

**Figure 6.5:** Add New Internal Membership screen

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.

## 6.5. 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 on their name. You can change the data on this screen by clicking on the 'New', 'Edit' or 'Delete' buttons, as shown below in Figure 6.6.

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
After Hours Emergency Contact	State, Branch, Club	<a href="#">O'Brien, Belinda</a>	23/09/2006	23/09/2007		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Age Manager Coordinator	State, Club	<a href="#">Borler, Alan</a>	23/09/2006	23/09/2007		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Education	National, State, Branch, Club	<a href="#">Bradman, Mark</a>	26/09/2006	26/09/2007		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Junior Activities	National, State, Branch, Club	<a href="#">Borler, Alan</a>	04/10/2006	04/10/2007		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Lifesaving	National, State, Branch, Club	<a href="#">Borler, Alan</a>	15/10/2006	15/10/2007		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Member Protection	State, Branch, Club					<input type="button" value="New"/>
OH&S	State, Branch, Club	<a href="#">Borler, Alan</a>	15/09/2006	15/09/2007		<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

**Figure 6.6:** View Officer screen

To assign someone to a position, click the 'New' button next to 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. By selecting the 'Use Organisation Office Postal Address', any mailings/reports that are generated for this member will use the organisation's postal address instead of the member's postal address recorded in their membership record.

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 on the 'New Officer Position' sub-sub-menu. This will open another screen that allows you to enter the name of the new position (see Figure 6.7).



### Setup Officer Position @ Test NSW Club

The screenshot shows a dialog box titled "Officer Position". It contains a text input field labeled "Officer Position Name:" with the text "OHS Assessor" entered. Below the input field are three buttons: "Save", "Reset", and "Cancel".

**Figure 6.7:** Setup Officer Position screen

## 6.6. Manage 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 checked by clicking on the 'Manage' button. - from there you can add, edit and delete items of equipment (see Figure 6.8).

Each piece of equipment is allocated specific attributes that relate to the type of equipment.

### View Gear & Equipment @ Test NSW Club

Type	Total	Options
Administration Equipment	0	<input type="button" value="Manage"/>
IRB	10	<input type="button" value="Manage"/>
IRB Motor	1	<input type="button" value="Manage"/>
Trailer	0	<input type="button" value="Manage"/>

**Figure 6.8:** Gear and Equipment management screen

## 6.7. Registration Season End Settings

Clubs will now need to mark when their registration season ends in order to freeze the Summary statistics for Membership Categories. A new screen, "**Registration Season**



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

## Tips

Click on the ‘Add New Internal membership Category’ button to create a new membership category.

View officers member details by clicking on their name. Change the data on this screen by clicking on the ‘New’, ‘Edit’, or ‘Delete’ buttons.

Add a new officer position via the ‘New Officer Position’ sub-sub-menu. This will open another screen that allows you to enter the name of the new position.

Ensure all your club/Branch/State information is entered into the Organisation Details area.

Ensure your Gear and Equipment is kept up to date in SurfGuard, by checking the list as often as possible.

Update your Positions and Committees after your election meeting, and check that details are still current as often as possible.

The ‘Organisational Details’ sub-menu allows users to view the official contact details for each part of the Surf Lifesaving Organisation.

Users can only edit information for which they have administrative access.

## Summary

Sub-menu options include:

- Service Profiles
- Committees
- Internal Memberships
- Officers
- Manage Gear and Equipment



## 7. Patrols

### 7.1. Patrols

The Patrols menu has five sub menu options — these are ‘Manage Patrol Teams’, ‘Patrol Logs’, ‘Unpatrolled Stats’, ‘Past Patrol Hours’, and ‘Patrolling Membership Categories’. This area allows you to create patrols teams, add members to teams, roster teams on patrol, record attendance, input patrol statistics and record activities that members undertook whilst on patrol.

### 7.2. Manage Patrol Teams

The Manage Patrol Teams allows two further options — ‘Manage Patrol Teams’ and ‘Add Patrol Team’. The first option 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 on the ‘Edit’ or ‘Delete’ link under the option ‘Actions’ (see Figure 7.1).



**Figure 7.1:** Patrol Positions



**Add a Patrol Team**

Team Name: -

**Figure 7.2:** Patrol Position Details

By clicking on the ‘Add a Patrol Team’ button on the Patrol Teams screen, you can setup a new Patrol Team. This feature is also accessed via the sub-menu.

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’ next to the member. If they do hold the correct awards, SurfGuard will display a green ‘Yes’. For a list of the award requirements, you can use the award requirements link at the bottom of the manage members page.

### 7.3. Patrol Logs

Once all your patrol teams have been set up and members and rostered times have been allocated to them, you can start entering the patrol logs for your club. This information is taken from the ‘Patrol Log Book’ which is filled out by the Patrol Team Leader whilst on patrol. For every date that a team is rostered, a log entry will appear in the ‘Patrol Logs’ screen. You may specify a date range and specify the status of the patrol in order to view a specific patrol log (see Figure 7.3).

**Patrol Logs View @ Test NSW Club**

Patrol Dates From:   To:    Format: dd/mm/yyyy

Log Status:

**Figure 7.3:** Patrol Logs View screen



If you have entered all your patrol teams and the rostered patrol times for each team, then an entire list of all 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.

To enter information into a patrol log, use the 'Create' button next to the required patrol log. Once you select the 'Create' button, the patrol log will be displayed on your screen. SurfGuard will automatically pre-fill the log with all members of the patrol team in their respective positions. To move other members into the log, you can select from the list of members on the left and use the '>' arrow button to move the member into the required position. To move a member out of a position, use the '<' button. 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:". This will also list only the members in categories listed in the "**Patrolling Membership Categories**" sub-menu item. This area can be used to filter the list as need be.

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.

Once the log has been completed, click the 'Continue' button. This will save the patrol log into the system and display the Patrol Statistics page. All statistics during the patrol must be entered into this area.

Important: To close the log immediately, keep the "Close log" option checked at the bottom of the patrol statistics page. If you wish to keep the patrol log open in order to make changes later, uncheck this option.

Other request actions on the Patrol Logs main page include Re-opening, Deleting or viewing the Status of the patrol log. If you request to re-open or delete a patrol log, you will be prompted to provide notes giving the reason for the request.

If left open, the Patrol Log will automatically close 21 days after the patrol log is created. If alterations or corrections to the Patrol Log are required after 21 days, the record will need to be re-opened and approved by your Branch or State Lifesaving Director.

You can add an 'Unrostered Patrol Log' such as a voluntary patrol, using the sub-menu option provided. To add an Unrostered Patrol, simply nominate a name, date, start and finish time and click on the 'Continue' button to create the entry, as seen in Figure 7.4, below. You are then taken to the 'Patrol Log' screen in order to enter the members involved in the log and their hours.



Add Unrostered Patrol Log @ Test NSW Club

Name: Additional Aust Day Patrol  
 Date: 26/01/2007  
 Format: dd/mm/yyyy  
 Start Time: 08:00  
 Finish Time: 18:00  
 Format: HH:mm (24hr)

Continue Clear Cancel

Figure 7.4: Unrostered Patrol Log screen

The 'Unpatrolled Stats' option also allows you to view and/or add details of incidents that occurred at times when no patrols were logged. As with Patrol Requests, the data available to you can be sorted by Branch, Club, Status and/ or Date. A number of actions can be carried out, such as editing the record, adding a note to the record or deleting the record, via the 'Action' buttons.

Enter a Season to Filter the List by.  
 Season: All

List Active Members Only:

Season: 2004/2005  
 Member: O'brien, Belinda (26/01/1991) - Active  
 Patrol Hours: 68  
 (Format: HH:mm)

Add Hours Clear Cancel

Member ID	Member	Season	Hours	Actions
4263632	Border, Alan	2002/2003	20:00	<a href="#">Edit</a> <a href="#">Delete</a>
4263634	bradman, mark	1999/2000	20:00	<a href="#">Edit</a> <a href="#">Delete</a>

Figure 7.5: Past Patrol Hours screen

## 7.4. 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 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 on the 'Add' button (see Figure 7.6).



**Figure 7.6:** Patrolling Membership Categories screen

## 7.5. Other Patrol Log Features

A member can be in a number of patrol logs for the same day, however their hours cannot overlap. A member can hold more than one position within a patrol team. Even though they may appear a number of times on the log, their hours will only be credited once. A member's patrol hours can start 2 hours before the log start time and can finish 2 hours after the log finish time.

You can add a member from another club to a patrol log by clicking the 'Add Visitor' button. If a patrol log contains more than 18 members then you will need to click the 'Next (With Update)' button to go to the next page of members. Only do this after the first page is up to date.

If you have left a patrol log in the 'Open' status, the patrol will automatically close after 21 days. You can only request the re-open or deletion of a patrol log once it is in the 'Closed' status. When you request the re-open or deletion of a patrol log, you must provide an adequate reason as to why you require this action. Branch or State approve the re-opening or deletion of all logs and will not do so if there is an unsatisfactory reason entered.



## Tips

A 'Close Log' checkbox is available at the bottom of the Patrol Logs Statistics screen. This will close the patrol log if it's ticked. To keep the log open, you must un-tick this box.

If left in the open status, Patrol Logs should be updated within 21 days of the Patrol Log being entered. After 21 days the Patrol Log automatically closes.

Filter the members for Patrols by using the Patrolling Members Category feature.

Manage Patrol Teams displays the Patrol Team name. View the members of each team and other actions by clicking on the 'Edit', 'Delete', 'Members' or 'Roster' link under the option 'Actions'.

Set up a new Patrol Team by clicking on the 'Add a Patrol Team' button on the Patrol Teams screen.

To add an 'Unrostered Patrol', simply nominate the name, date, start and finish time and click on the continue button to create the entry.



## 8. Mailing Groups

### 8.1. 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. There is a number of mailing group types, including 'Board', 'Family', 'Committee' and 'Patrol' groups. You can view the members of a mailing group by clicking on the link. For example, the members of the 'SurfGuard Users' Committee are displayed below (at Figure 8.1). An individual committee member's details can then be displayed by clicking on their name (Figure 8.2).

**Mailing Groups View @ Surf Life Saving NSW**

Mailing Group Type: Committee ▼

New Mailing GroupNew Mailing Group TypeView Mailing Group Types

Type	Group Name	Actions
Committee	<a href="#">Surfguard Users</a>	
Committee	<a href="#">test</a>	

**Figure 8.1:** The Mailing Groups screen shows available mailing types

### 8.2. New Mailing Group

You can add a new Mailing Group by clicking on 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 would be selected using the Add/ delete members section on the right (See Figure 8.3).

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.



**Figure 8.2:** Add Mailing Group set up screen.

### 8.3. 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, as seen below in Figure 8.3. The different types of mailing groups can be accessed by clicking on the relevant hyperlink.



**Figure 8.3:** Mailing Group Types screen

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



button on the Mailing Group Types screen (Figure 8.4). The “Mailing Group Type Add’ screen can also be accessed directly via the sub menu item ‘New Mailing Group Types’, as seen in Figure 8.4.

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.

## Tips

View the members of a mailing group by clicking on the link.

An individual member’s details are displayed by clicking on their name.

The ‘Mailing Group Type Add’ screen can also be accessed directly via the sub-sub menu item ‘New Mailing Group Types’.

View sets within the database via the ‘Mailing Groups’ sub-menu.

Mailing group types include ‘Board’, ‘Family’, ‘Committee’ and ‘Patrol’ groups.

Add a new Mailing Group by clicking on the ‘New Mailing Group’ sub-menu.

## Summary

Select members from the new mailing group using the Add/Delete Mailing Group Members column. Use the add (>) or remove (<) arrows to compile the group list.

Add a new mailing group type by clicking on the ‘New Mailing Group Type’ button on the Mailing Group Types screen. This screen allows you to name a new mailing group.



## 9. Messages

### 9.1. 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'. These allow you to access your messages and to send new 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. The sorting option is displayed in the 'View Messages' dropt down list as seen in Figure 9.1.

The screenshot shows a web interface titled 'Messages @ Test NSW Club'. At the top left is a 'Create Message' link. At the top right is a 'View Messages:' dropdown menu currently set to 'Unread'. Below this is a table with three columns: 'Subject', 'Sender', and 'Date'. Each row has a checkbox to its left. At the bottom of the table are two buttons: 'Mark as Read' and 'Archive'.

Subject	Sender	Date
<input type="checkbox"/> Lifesaver wine from Margaret River	Margaret River	Thursday, 22 March 2007 18:14
<input type="checkbox"/> ATTENTION: ALL MARCHPAST TEAMS & COACHE...	Cronulla	Thursday, 22 March 2007 13:33
<input type="checkbox"/> Reunion notice - please put on club noti...	Whyella	Wednesday, 7 March 2007 18:47
<input type="checkbox"/> DVD Production	Macksville-Scotts Head	Friday, 2 February 2007 08:13
<input type="checkbox"/> Signet Manly Open Surf Carinval 2007	Manly	Thursday, 18 January 2007 11:17
<input type="checkbox"/> Darwin Surf Life Saving Club Silver Anni...	Darwin	Monday, 27 November 2006 22:57
<input type="checkbox"/> Assessors name on new exam/assessment re...	Surf Life Saving NSW	Tuesday, 7 November 2006 12:38
<input type="checkbox"/> <u>Select All</u>		

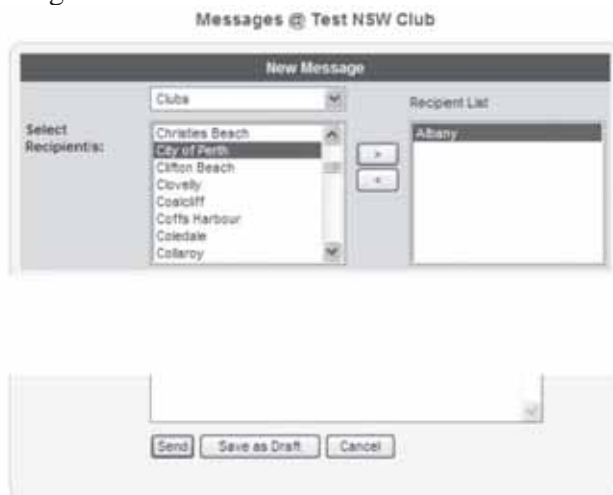
**Figure 9.1:** Default Messages screen

### 9.2. Create Messages

There are two ways to initiate a new message. You can click on the 'Create Message' link from the default messages screen (as shown in Figure 9.1), or you can click on the sub-menu item on the toolbar. The screen that is displays 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.



**Figure 9.2:** Composing a new message

## Tips

Sort messages using the 'View Messages' drop down list.

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.

The two sup-menu options under 'Messages' allow access to incoming messages and sending new messages.

## Summary

The default 'Messages' screen lists all unread messages.

Message options include read, sent, draft, archived.

Click on the 'Create Message' link from the default messages screen to initiate a new message.

Select the message recipients from the available list using the add (>) or remove (<) arrows.



## 10. Maintenance

### 10.1. Maintenance

There is only one option for Club level users under the Maintenance sub-menu being 'Enrolment Source Companies'. Users can then access either of the two sub-sub-menu items 'Maintain Source Companies' or 'Create New Source Company'.

### 10.2. Source Companies

Source Companies are those entities that describe where a member or course registrant comes from. To update company information, select the 'Maintain Source Companies' option from the menu. You can view, edit or delete records by clicking on the relevant button in the Options column (see Figure 10.1).

**Source Companies View @ Test NSW Club**

Company Name	Contact Person	Options
Australian Lifesaving University	Sandy Shores	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
Swim About	Peter Swim	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

**Total: 2**

**Figure 10.1:** The source companies list is accessed via the Maintenance sub-menu item

### 10.3. Create New Source Company

A new Source Company can be added by either clicking on the 'Create New Source Company' button at the bottom of the Source Companies screen or via the sub-menu (see Figure 10.1). The details of the new company can then be added by simply completing the fields, as shown in Figure 10.2.



Add Source Company @ Test NSW Club

General Details		Business Address	
Company Name:	Swim About	Address:	123 About St
Trading Name:	Swim About	Suburb:	West Wyalong
ABN:	122 345 567	State:	NSW
Company Phone:	12345678	Post Code:	2671
Company Fax:	12345678	Country:	Australia
Notes:		<b>Postal Address</b>	
<b>Company Contact Person</b>		Address:	123 About St
First Name:	Peter	Suburb:	West Wyalong
Last Name:	Swim	State:	NSW
Work Phone:	12345678	Post Code:	2671
Mobile Phone:	012345678	Country:	Australia
Email:	p.swim@about.com.au		
Supervisor's First Name:			
Supervisor's Last Name:			

**Figure 10.2:** Add Source Company screen

## 10.4. Transactions Maintenance

Transaction types can be added to the already 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.

### Tips

You can view, edit or delete records on the Source Companies View screen by clicking on the relevant button in the Options column.

Add a new entry by clicking on the ‘Create New Source Company’ button on the Source Companies view screen or via the sub-menu.

The Source Companies feature can be used by clubs to track new member trends, etc.



## Summary

Source companies are those entities that provide goods or services to your Club in relation to delivery of awards and other training.

Users can access either 'Maintain Source Companies' or 'Create New Source Company' via the 'Enrolment Source Companies' option under the maintenance sub-menu item.



## 11. Reports

### 11.1. Reports

SurfGuard provides two types of Reports — Standard Reports and Custom Reports. A list of standard reports is available from the drop-down list on the 'Member Details Reporting' screen. Report options include Club Contacts, Competition, Email Lists, Mailing Lists, Gear and Equipment Lists, Membership Lists, Patrol Lists, Patrol Statistics, Awards and Service Profiles.

There are also a number of output formats available from the drop-down list for each report, including HTML format (web-page look), Excel spreadsheet format, PDF, normal text format and Comma or Pipe Separated. These can be output in MS Excel or MS Word format, which will allow you to manipulate the data. Reports can also be sorted using a number of drop-down options, such as Group Type, Officer Position, Branch, Club, Status, and Membership Type etc. Some reports will run in the background of SurfGuard and can either being emailed on completion or sent as a SurfGuard message.

It is important to note that you only need to select the criteria you wish to report on and do not need to fill in every box.

To report on members in your mailing groups, or example to print a mailing labels report, you can select options from the Group type area in the reports screen. If you do not wish to report on your mailing groups then you must ensure this is left as the default selection and not changed.

A checkbox is available in many reports giving the option of viewing the selection criteria used.

### 11.2. Custom Reports

A Custom Report can also be created and saved as a template for future use. To load a saved template, go to the 'Custom Reports' sub-menu option and simply click on the 'Browse' button to select the template file. To create a new custom report template click on the 'Create New Report' button, as shown in Figure 11.1



**Custom Reports @ Surf Life Saving NSW**

Load Saved Template

OR

**Figure 11.1** Load a Custom Report template or create a new report

To create a custom report, simply select the output fields that you wish to see in your report by clicking in 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 (Figure 11.2).

For example, to create a report to see the first name, last name and age of all male members with an occupation of student. Put a tick next to the first name, last name and age on the left and select gender as Male and occupation as Student on the right. Then 'display report' at the bottom.

### 11.3. 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 States gear and equipment recorded in SurfGuard. To create a new Gear and Equipment custom report, follow the same procedure as described for custom reports.



Member General Details

<input type="checkbox"/> Member ID:	<input type="text"/>	<input type="text"/>	Member ID:	<input type="text"/>
<input type="checkbox"/> Title:	<input type="text"/>	<input type="text"/>	Title:	<input type="text"/>
<input type="checkbox"/> First Name:	<input type="text"/>	<input type="text"/>	First Name:	<input type="text"/>
<input type="checkbox"/> Middle Name:	<input type="text"/>	<input type="text"/>	Middle Name:	<input type="text"/>
<input type="checkbox"/> Last Name:	<input type="text"/>	<input type="text"/>	Last Name - From:	<input type="text"/> To: <input type="text"/>
<input type="checkbox"/> Preferred Name:	<input type="text"/>	<input type="text"/>	Preferred Name:	<input type="text"/>
<input type="checkbox"/> Gender:	<input type="text"/>	<input type="text"/>	Gender:	<input checked="" type="radio"/> All <input type="radio"/> Male <input type="radio"/> Female
<input type="checkbox"/> Date of Birth:	<input type="text"/>	<input type="text"/>	Date of Birth - From:	<input type="text"/> To: <input type="text"/>
<input type="checkbox"/> Age:	<input type="text"/>	<input type="text"/>	Age:	<input type="text"/>
<input type="checkbox"/> Occupation:	<input type="text"/>	<input type="text"/>	Occupation:	<input type="text"/>

Member Home Address

Member Postal Address

Member Phone Numbers

Member Email Address

Patrol Log Members

Patrol Log Stats

Patrol Log Notes

Patrol Log Requests

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

Records Per Page:  Delimiter:  or Tab:

Create Template:

**Figure 11.2:** 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



## Tips

Use the 'Custom Reports' sub-menu option to load a saved template. Click on the 'Browse' Button to select the template file.

To create a new custom report template click on the 'Create New Report' button via the 'Custom Reports' sub-menu option, then select the criteria that you wish the report to cover by clicking in the applicable check-box or using the drop-down list.

## Summary

There are two types of reports available: 'Standard Reports' & 'Custom Reports'.

Access standard reports from the drop-down list on the 'Member Details Reporting' screen.

Report options include Club Contacts, Competition, Email Lists, Mailing Lists, Gear and Equipment Lists, Membership Lists, Patrol Lists, Awards and Service Profiles.

The drop-down list for each report also provides the output format options, including HTML, Excel, PDF and text formats.

Reports can be sorted using drop-down options, including Group Type, Officer Position, Status, and Membership Type.

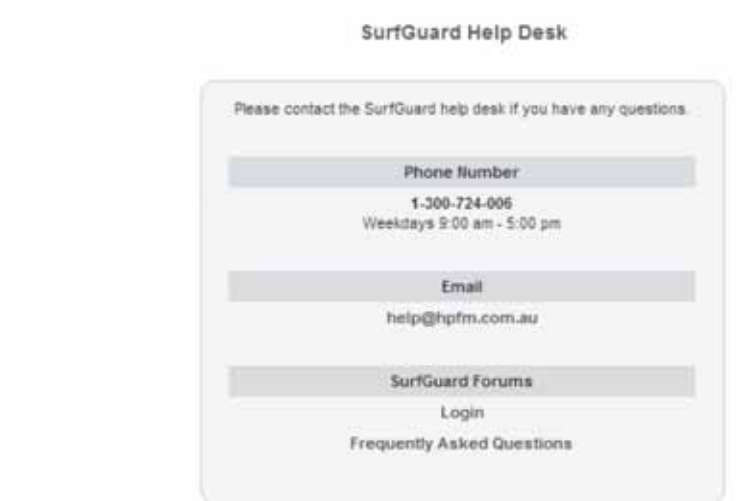
A Custom Report can be created and saved as a template for future use.



## 12. SurfGuard Help

### 12.1. SurfGuard Help Desk

The details for the SurfGuard Help Desk are available on every screen via the 'Help Desk' hyperlink. By clicking on the hyperlink, a new window will open up to display the Help Desk contact details, which include a toll-free phone number and email address. The Frequently Asked Questions (FAQs) can also be accessed from this page.



**Figure 12.1:** SurfGuard Help Desk details

### 12.2. Frequently Asked Questions

The Frequently Asked Questions (FAQs) area of the site allows you to search for the answers to previous users' questions. You can post your own questions to the site or post a comment on any of the already answered questions. You can print the answer or email it to yourself or to another person by clicking on the printer or envelope icons. FAQs are listed by category and sub-categories. You can select a category to view the questions and answers within that category, as illustrated in Figure 12.2.



Surfguard FAQ > Surfguard

### Category summary

Here is information related to this category.

Category	Q&A
<b>Surfguard</b> General Q & A about the Surfguard system	4
Surfguard Login Information about logging into Surfguard	1
Members Information about the members section of Surfguard	2
Mailing Groups Information about the mailing groups section of Surfguard	1

### Q&A

Here are the published Q&As of that category.

Question	Published on	Hits
----------	--------------	------

**Figure 12.2:** Using the Online Help feature

+

## Tips

The SurfGuard Help Desk can be contacted on: Ph: 1300 724 006

The help desk is staffed weekdays from 9.00am to 5.00pm EST.

Email the SurfGuard help desk at – [help@hpfm.com.au](mailto:help@hpfm.com.au) or [surfguardhelp@slsa.asn.au](mailto:surfguardhelp@slsa.asn.au)

Access the SurfGuard Help Desk details using the ‘Help Desk’ hyperlink.

Help Desk contact details are displayed in a new window.

Frequently Asked Questions (FAQs) are also accessed using the ‘Help Desk’ hyperlink.

Frequently Asked Questions (FAQs) are listed by category and subcategories.



## Part 2: SURFGUARD USERS – BRANCH/STATE

### 13. Branch/State SurfGuard Users

#### 13.1. Branch/State Users

The details displayed in SurfGuard are dependant 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.

#### 13.2. Assessments

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. Proficiency numbers are no longer required.

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 member's.

Branches and States can Archive Assessments. To archive complete assessments if you are a State, select 'Exam Complete' Status and 'All' Assessment Types. To archive complete assessments if you are a Branch (or Club), select 'Exam Complete' Status and 'Proficiency' Assessment Type. To archive rejected assessments, select 'Exam Rejected' Status. A button 'Archive' will appear. When clicked, it will archive the currently displayed assessment request.

It should be noted that only States can archive Award assessments, as they need to do extra processing upon completion (such as printing of certificates).



### 13.3. Transfers

The following Transfer rules or definitions apply in SurfGuard.

**Endorsed Transfer:** Has been Endorsed and is waiting for Branch or State to Approve it.

**Approved Transfer:** Has been approved by state or branch and is ready for the winning club to complete it. When the winning club hits the 'Complete' link, this is when the transfer actually occurs and the member gets transferred.

**Rejected:** This means that the transfer has been rejected by the branch/state user.

**Not Endorsed:** The transfer has not been endorsed by the losing club. However, the transfer can still be approved by the branch/state.



**Important:** It should be noted that 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 actually reject the transfer.

### 13.4. Patrols

A key role of Branches and States is to manage patrols, and there are a number of options under the 'Patrols' menu item that allow you to do this. For States, 'Set-up Patrol Positions' and 'Add Patrol Positions' allow you to select or manage the qualifications profile of those members who form part of a patrol team. When adding a Patrol Position, you can nominate a number of awards, which are sorted based on award type, as either mandatory or optional (see figure 13.1).

The 'Authorise Requests' option allows you to authorise changes to Patrol Logs made by Clubs. This screen has a number of options and allows you to sort data by Branch, Club, Action Types, Request Types and/or Status Types. Authorise Requests by clicking on 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.

A screenshot of a software interface for adding a patrol position. On the left, there are four input fields labeled "Position Name:", "Award Abbreviation:", "Maximum Members:", and "Display Order:". To the right, there is a section for "Award Type:" with a dropdown menu currently set to "SLSA Education". Below this is a list of "Available Awards" including various certificates and assessor roles. On the far right, there are two empty boxes labeled "Mandatory Awards:" and "Optional Awards:" with arrows indicating movement between the lists. At the bottom, there are "Save", "Clear", and "Cancel" buttons, and a note that says "Enter in the order of importance."

**Figure 13.1:** Add Patrol Position screen.

A new listing can also be added via the 'Add Un-patrolled Stats' button. This will open a new screen, on which you can enter details that pertain to a certain date. Details include time and number of rescues performed, beach attendance, first aid required, tide information and weather conditions.

## 13.5. Mailing Groups and Reports

Mailing Groups and Reports can be used by Branches and State committees. When creating a Mailing Group or Report, only the member Clubs and individuals of your Branch/State are available to you. Member information can be sorted by Club and then by all the other categories within the Club, as shown in Figure 13.2.



### Member Details Reporting @ Surf Life Saving NSW

Report Type:

Output Format:

Enter the following fields to narrow your search:

From:

To:

Enter the following fields to narrow your search:

Branch:

Club:

**Figure 13.2:** State level reporting screen.

## 13.6 Maintenance

You can Allocate Awards to members using the 'Awards Allocations' submenu. This allows you to search for a member using their name or membership identification number. You can then use the drop-down options to enter all relevant information including their club name and the details of the award, as seen in Figure 13.3, below.

### Allocate Award @ Surf Life Saving NSW

**Member Search**

Please enter EITHER member ID OR name to search.

Member ID:

First Name:

Last Name:

Allocation Type:

**Figure 13.3:** Allocating an Award to a Member



## **Tips**

Some actions taken by branches and/or states may overwrite entries made by Clubs.

Only states have the authority to archive Award assessments.

Displayed details are based on level of access.

## **Summary**

For those who have branch or state level administrative access, a range of different sub-menu options is available.

The available view on most screens is expanded to include all club information within your branch or state.



## PART 3: SURFGUARD USERS — NATIONAL

### 14. National SurfGuard Users

#### 14.1. National Users

The details displayed in SurfGuard are dependant on your level of access. For those who have National level administrative access, a range of different submenu 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.

#### 14.2. 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 on the 'Manage' button and following the prompts on the relevant sequence of screens.

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 (see Figure 14.1).

**Gear & Equipment Definition @ Surf Life Saving Australia**

Name: \*

Description:

Type:

**Available Attributes:**

- Amount (Number; -)
- Board Type (List; -)
- Equipment Insured for: (Currency; \$)
- Gear Inspection Completed by: (Small Text (20))
- Gear Inspection Notes/Comments (Large Text (1000))
- Height (Number; m)
- IRB Class (List; -)
- IRB Model (List; -)
- Last Service on: (Date; -)
- Make/Model (Large Text (100 charac))

**Selected Attributes:**

- Colour (List; -)
- Date of Purchase (Date; -)
- Current Gear Inspection Date (Date; -)
- Equipment Insured by: (Small Text (20))
- Item Description (Large Text (1000))
- Registration Number (Small Text (20))

**Figure 14.1** New Gear and Equipment screen.



### 14.3. Maintenance

The Maintenance area of SurfGuard contains three sub-menu items available to National level users, these being: 'Award Allocations', 'Award Maintenance' and 'Enrolment Source Companies'. Each of these areas has sub-sub-menu items from which you can make a selection.

You can Allocate Awards to members using the 'Awards Allocations' submenu. This allows you to search for a member using their name or membership identification number. You can then use the drop-down options to enter all relevant information including their club name and the details of the award, as seen in Figure 14.2, below.

**Allocate Award @ Surf Life Saving NSW**

**Member Details**

Candidate: \* Blackwood, Billy (DOB: 12/03/1973)

**Award Type Details**

Allocation Type: Award

Award Type: \* SLSA Education

Award: \* Bronze Medallion

Override Prerequisite Checks:

**Award Details**

Award Issue Date: \* 01/08/2007  (dd/mm/yyyy)

Manual Award Number:

Proficiency Date: 01/08/2007  (dd/mm/yyyy)

Assessor: => Please Select <=

Document Location:

**SLSA Originating Organisation**

National: Surf Life Saving Australia

State: Surf Life Saving NSW

Branch: Far South Coast Branch

Club: Batemans Bay

**Figure 14.2:** Allocating an Award to a Member

Award prices can be allocated using the 'Awards Maintenance' sub-menu option. By using the available drop-down lists, you can select specific awards as they relate to status



and award type. You also have a number of administrative options from the ‘Award Prices’ screen, including setting a new price for an award, viewing the award pricing details, editing these details or deleting the award. The Awards Maintenance options are illustrated at Figure.

Award Prices View @ Surf Life Saving NSW

Status:  Award Type:  Award:   
 Prices Valid On:  Format: dd/mm/yyyy (Leave blank to retrieve all prices)

Award Name	Award Type	Price Valid From	Price Valid To	Price	Options
VHF Marine Licence	Other	07/09/2006		11.70	<input type="button" value="New Price"/> <input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
VHF Marine Licence	Other	01/01/2004	06/09/2006	11.70	<input type="button" value="New Price"/> <input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

Total: 2

**Figure 14.3:** Award Prices View under the Awards Maintenance sub-menu

Two maintenance options are available under the Enrolment Source Companies sub-menu. The ‘Source Companies View’ screen lists all companies that provide services or goods to your club. You can view the company’s full details by clicking on the ‘View’ button (see Figure 14.4). Other options include ‘Edit’ and ‘Delete’. You can also enter a new company from this screen by clicking on the ‘Create New Source Company’ button, as illustrated at Figure 14.5.

### Source Companies View @ Surf Life Saving NSW

Company Name	Contact Person	Options
Swim About	Peter Swim	<input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>

Total: 1

**Figure 14.4:** Source Companies View



Add Source Company @ Surf Life Saving NSW

General Details	
Company Name:	Life Save Equip Australia
Trading Name:	
ABN:	12 345 678
Company Phone:	08 89456132
Company Fax:	08 89456133
Notes:	
Company Contact Person	
First Name:	Susan
Last Name:	Mann
Work Phone:	08 89456132
Mobile Phone:	041122334455
Email:	s.mann@lsea.com.au
Supervisor's First Name:	
Supervisor's Last Name:	

Business Address	
Address:	10 Dead St
Suburb:	Darwin
State:	NT
Post Code:	0800
Country:	Australia
Postal Address	
Address:	PO Box 10
Suburb:	Darwin
State:	NT
Post Code:	0800
Country:	Australia

Figure 14.5: Adding a new Source Company



## Tips

The 'Organisational Management' area allows you to define and manage equipment. The 'Define Gear and Equipment' and 'Define Gear and Equipment Attributes' options allow you to name, describe, and assign the attributes to new equipment.

Allocate Awards to members using 'Awards Allocations' sub-menu, then search for a member using their name or membership identification number.

## Summary

Allocate award prices via the 'Awards Maintenance' sub-menu option.

Use the drop-down lists to select specific awards as they relate to membership status and award type.

The details displayed in SurfGuard are dependant 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 is expanded to include all Club information and allows you to sort this information by Club, Branch, State or National sets.



## 15. SurfGuard Administration

### 15.1. 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 dependant on your level of access. If you believe you require higher User Admin access at Club, Branch, Sate and/or National level, contact the Help Desk.

### 15.2. 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 apposed to the playpen) and drawn from the membership database (see Figure 15.1).

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.

SLSA Memberships	Production	Memberships	Edit	Delete	View	Permissions
SLSA Memberships (Playpen)	Playpen	Memberships	Edit	Delete	View	Permissions

### 15.3. 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 (see Figure 15.2).

Once a new user has been created, they will be sent an email to inform them that they must change their password the first time they log on. (This email is assigned under the drop-down option entitled 'Email Template' and can also be accessed via the menu item list). 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 contact the Help Desk to have your account reactivated.

A screenshot of the 'User Admin - New User' web form. The form is divided into several sections: 'User Information' (User Name, User Password, First Name, Surname, Main Organisation, Position, Phone Number, Mobile Phone, Email), 'Account Settings' (Force Password Change, Registered for Newsletter, Status), and 'Email Settings' (Send Email, Email Template). On the right side, there are two lists: 'Available Groups' and 'Available Organisations', each with a 'selected' list on the right. The 'Main Organisation' is set to 'Avoca Beach'. The 'Status' is set to 'Active'. The 'Email Template' is set to 'New Account'. The 'User Created By' is 'Surf Life Saving Australia'. There is a small note at the bottom: 'Please Note: Changing the User Created By will give authority to the selected organisation and others above it to update this user.'

**Figure 15.2** User Admin — New User.

We can see if figure 15.2 that the new member has main access to the Avoca Beach organisation however they also have access to a number of other clubs listed in the Available organisations in the bottom right. The member is assigned to 2 permissions groups, SLSA Memberships, giving full access to SurfGuard at a National Level, and also SLSA Maintain Current User, which enables the user to update their login details and password. By selecting the Force password change checkbox, the user will be forced to change their password when they login for the first time. By selecting the Send Email checkbox, An email will also be sent to the user containing their login details.

## 15.4. Maintenance

The 'Maintenance' option allows an administrator to access options for organisational management. This option allows the name and type of organisation to be selected for which the admin user wishes to select or edit New Organisations can also be added via this menu item (see Figure 15.3).



## Add Organisation @ Surf Life Saving Australia

Organisation Name: *	<input type="text"/>
Organisation Code:	<input type="text"/>
Abbreviation:	<input type="text"/>
Organisation Type: *	<input type="text"/>
Parent Organisation:	<input type="text"/>
Award Number Prefix:	<input type="text"/>
Status: *	<input type="text"/>
Non SLSA:	<input type="checkbox"/>
Is RTO:	<input type="checkbox"/>

**Figure 15.3** User Admin — Add Organisation.View

### Tips

The 'Groups' option allows you to sort and search by group. Groups are listed by Name and can be sorted based on the Environment and Application to which they relate.

New Organisations can also be added via the maintenance menu item.

You can change your contact details or password via the 'Current User' menu item.

### Summary

The 'User Admin' Function is located beneath the Banner in the Login Details area of your SurfGuard screen.

The details displayed to you as an administrator are dependant on your level of access. If you require higher User Admin access contact the Help Desk



## PART 4: LIFEGUARDS – COUNCILS / BEACHES

### 16. Lifeguards

#### 16.1. Overview

The Lifeguards module has been developed to assist Lifeguard managers in organising and tracking Lifeguard services. In its initial stages, the Lifeguard Councils, Shires, Beaches and Pools will be managed by users with State level access. Lifeguard entities resemble the traditional SurfGuard layout however there are a number of changes to permissions and functionality specific to managing Lifeguard services in SurfGuard. The hierarchy for lifeguard entities follow the same guidelines as traditional clubs and branches. Pools and Beaches are classed as Clubs in addition to Councils and Shires being classed as Branches.

#### 16.2. Organisational Details

Organisational Details contain all information relating to the Service that has been setup, like addresses, contacts, ABN, Bank Details and GPS reference data etc. If filled out (fully) it can be used as a means of obtaining details for mail-outs, lists and other information usually collected at the start of the season on a form. This information is also used throughout the whole Organisation and will be used for displaying on the SLSA website.

For each lifeguard beach, Service Profiles should also be filled out.

Councils and Beaches may wish to use the Org Management / Gear and Equipment area to:

- Keep track of essential gear in use and its age
- Maintenance of IRB Registration information
- Keep track of the quantity and type of gear
- Check on the make and model of equipment
- Check on the Warranty details of gear
- Councils should enter their own Gear for the above purposes
- Councils can see what gear is held at Beaches to see if Sponsorship of grants should be targeted or arranged for specific items
- Allows entities to calculate the costs around gear and equipment for grants and sponsorships.

#### 16.3. Adding statistics for reports

So that each Lifeguard service can efficiently and correctly compare activities as part of their reporting requirement, it is important that base line statistics are entered into SurfGuard.



To enter these statistics use the Patrols/Unpatrolled Stats screen. This data is then used to compile the statistical reports found under the Reports menu. The report type 'Patrolled and/or Unpatrolled Stats Comparison' compiles graphs to compare the data on a monthly or yearly (either yearly calendar or patrol season) basis. You may choose from 2 to 5 months/years to compare. The report may be output to view as html or a PDF.

## 16.4. Members

When adding a member into a Lifeguard entity it is possible to add the member to one Beach/Pool or enter them into an entire Lifeguard Council. Adding a member to a Council means they would become a member of every beach/pool that falls under the Council. To add members to a council, tick the checkbox marked “Council” and select the relevant Council (see figure 1.1).

### Surf Life Saving NSW: Add Member Details

The screenshot shows a web form titled 'Organisation Membership Details'. At the top, there are three buttons: 'Reset', 'Submit', and 'Cancel'. The form fields include: 'Add to:' with checkboxes for 'Single Organisation' and 'Council' (checked); 'Organisation:' with a dropdown menu showing 'Ballina Shire (Lifeguards)'; 'Membership Category:' with a dropdown menu showing 'Probationary'; 'Date Joined: \*' with a date input field and a calendar icon; 'Membership Status:' with a dropdown menu showing 'Active'; 'Registered for Season:' with an empty text input field; 'Register for Season:' with three buttons: 'Previous', 'Current', and 'Next'; 'Competitive rights:' with radio buttons for 'Yes' (selected) and 'No'; 'Member Protection Form:' with a checkbox for 'Completed'; 'Member Protection Date:' with a date input field and a calendar icon; 'Member Protection Registration No:' with an empty text input field; 'Member Protection Registration Date:' with a date input field and a calendar icon; 'Locker No:' with an empty text input field; and 'Club Keys:' with an empty text input field.

Figure 1.1: Adding new members to a lifeguard Council

If Adding a member to a single organisation you must ensure the “Single Organisation” checkbox is ticked. This will list all available SLSA Clubs and Lifeguard Beaches/Pools. Selecting “Council” will only list available Lifeguard Councils.



If someone is already a member of a lifeguard service or SLSA club, you can add this person to an alternative lifeguard beach or council without requiring a transfer. Select the “Add Member” link in the Members sub menu and enter the person’s first name, last name, date of birth and gender. Once you have completed this click the “Check for Duplicate” button, this will search the SurfGuard database for the member. If the member is found, a message will appear asking if you would like the member to become part of the lifeguard beach (see figure 1.2). By selecting OK, SurfGuard will then automatically add the member to the organisation without removing them from their original beach or club. This also works in reverse when members are added into clubs however already hold membership at a lifeguard beach.

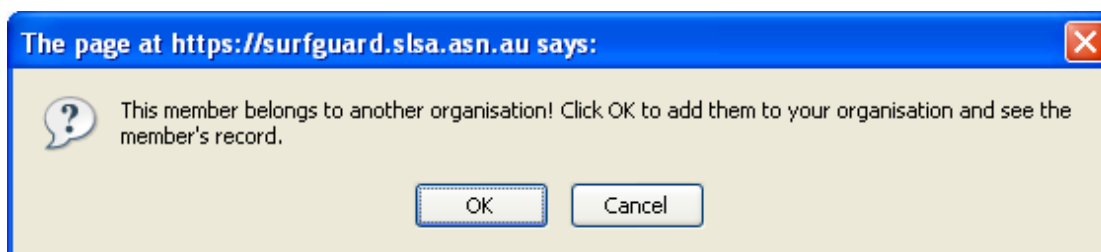


Figure 1.2: Adding members from other organisations

When Activating members through “Bulk Processing” in the Members menu item, SurfGuard will automatically register all selected members for the current season.

A script is run on the first day of every season (1st July for the given year) in which all active members are automatically registered for the current season. If a member in your organisation will not be renewing for the next season they must be archived immediately so that you efficiently manage the pool of active Lifeguards.

Lifeguard entities consist of 6 membership categories that a member can be associated with:

- Trainee Lifeguard
- Casual Lifeguard
- Part-Time Lifeguard
- Full-Time Lifeguard
- Senior Lifeguard
- Lifeguard Supervisor

## 16.5. Assessments

The Assessments menu allows users to view current or past assessments or to enter new assessment information. Users can only add, edit and view information for which they have access.

By clicking on the sub-menu item ‘New Assessment Request’, you can create



a new assessment record. You can select assessment specifics by choosing from the various drop-down options. Select from available candidates by clicking on a name and using the add arrow ( > ).

Only members who are not in another incomplete assessment request will be listed as the available candidates for a new 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. To check age requirements and pre-requisites, run the “Reference: Awards” report in the reports area.

Some awards now require the entering of pool or activity times. These fields are available against their respective awards and this information can be input during the “process results” stage of an assessment (see figure 1.3). As all results must be approved, the results of pool/activity times and pass/fail information can also be edited by the Council level administrator during the “Awaiting Candidate Approval” stage.

Candidate Results						
Member	Award	Competent	Pool Time (hrs.mins.secs)		Activity Time (hrs.mins.secs)	
Jones, Travis (4448395; 19/02/1981)	Bronze Medallion	<input checked="" type="checkbox"/>	<input type="text" value="12"/>	<input type="text" value="34"/>	<input type="text" value="1"/>	<input type="text" value="24"/>
	Certificate II in Public Safety (Aquatic Rescue)	<input checked="" type="checkbox"/>				
	Apply Surf Awareness and Self Rescue Skills	<input checked="" type="checkbox"/>				
	Communicate in the Workplace	<input checked="" type="checkbox"/>				
	Follow Defined Occupational Health and Safety Policies a	<input checked="" type="checkbox"/>				
	Operate Communication Systems and Equipment	<input checked="" type="checkbox"/>				
	Participate in an Aquatic Rescue Operation	<input checked="" type="checkbox"/>				
	Provide Emergency Care	<input checked="" type="checkbox"/>				
	Work Effectively in a Public Safety Organisation	<input checked="" type="checkbox"/>				
	Work in a Team	<input checked="" type="checkbox"/>				

**Figure 1.3: Processing results for an Assessment**

Figure 1.3 (Please note this is an example only and a Bronze Medallion may not require times to be entered) above shows an example for entering Pool and Activity times. If an award requires a time to be input, the option will be available next to the relevant award. In this case, The Bronze Medallion award is asking for a Pool time and Activity time. The example shows the Pool time entered as 12 minutes 34 seconds and the Activity time as 1 hour 24 minutes and 6 seconds.

For Proficiency assessments, once the assessment is approved by your Council or State, the members' award will be updated with the new proficiency information. Please note that only members who hold the award will be listed in the available members.

## 16.6. Transfers



Although the Transfers menu item may be available, all Lifeguard entities are unable to access this area of SurfGuard and cannot initiate or process transfers. See “1.2 Members” above for information specific to transferring the membership of lifeguards.

## 16.7. Patrols

A key role of Beaches, Councils and States is to manage patrol specific information, and there are a number of options under the ‘Patrols’ menu item that allow you to do this. Councils and States now have access to areas such as patrol teams (see Figure 1.4), patrol logs and patrol statistics. This information can be viewed for only the Beaches that fall under your Council or State. For Beaches and Pools, the patrol menu items will only be specific to your single organization.

### Patrol Teams @ Surf Life Saving NSW

[\[ Help \]](#)

**Retrieve Available Teams From:**

Branch:

Club:

Team Name	Actions
Team 1	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Members</a> <a href="#">Roster</a>

**Figure 1.4: Manage Patrol Team screen (NSW State Level).**

At a Council and State level, the ‘Authorise Requests’ option allows you to authorise changes to Patrol Logs that need to be made by Beaches. This screen has a number of options and allows you to sort data by Council, Beach, Action Types, Request Types and/or Status Types. Authorise Requests by clicking on 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.

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 (see Figure 1.5).



Unpatrolled Stats @ Byron Shire Council (Lifeguards)

Club: Brunswick Heads (Lifeguards) | Date: (dd/mm/yyyy) | Start Time: 09:00 (HH:mm (24hr)) | Finish Time: 18:00 (HH:mm (24hr))

**Weather Conditions**

**Weather**  
 Weather: [dropdown]  
 Wind Direction: [dropdown]  
 Wind Conditions: [dropdown]  
 Wave Type: [dropdown]

**Wave Height (m)**  
 9:00am: [dropdown]  
 12:00pm: [dropdown]  
 2:00pm: [dropdown]  
 5:00pm: [dropdown]

**Number of Rips**  
 9:00am: [input]  
 12:00pm: [input]  
 2:00pm: [input]  
 5:00pm: [input]

**Ocean Outfalls**  
 Sewage Pollution  
 Stormwater  
 Algae  
 Stingers  
 Seaweed  
 Nil

**Tide Time**  
 High: 00:00  
 Low: 00:00  
 High: 00:00  
 Low: 00:00

**Beach Closed**  
 Number of Times: [input] Reason: [dropdown]  
 Full Day:   
 Part Day:   
 From: 00:00 To: 00:00

**Reason:**  
 Dangerous Surf  
 Marine Stingers  
 Sharks  
 Crocodiles  
 Pollution  
 Other

Figure 1.5: Add Unpatrolled stats screen.

The above example (Figure 1.5) is only a small selection of the Unpatrolled Stats page however this shows clearly some of the fields required and selections available for choosing beaches, if logging the stats at a Council or State level.

Patrol Logs and Unrostered patrol logs can be accessed through the “Patrol Logs” sub-menu item in the ‘Patrols’ menu. To create a patrol log, there must be at least one patrol team set up for the specified club and the team must have members assigned to and a roster for the season. For each team that has a rostered patrol, a patrol log will be listed in the “Patrol logs” screen. To enter the details for a patrol, you must click the “Create” button relating to your patrol log. This will bring up the patrol log screen and prefill the positions with the members of the patrol team associated with the log. If adding an unrostered patrol log (see Figure 1.6), the positions will be left blank and a list of members on the left is available for positioning into the log. The members listed on the left are returned from all the membership types the organisation has selected in the “Patrolling Membership Categories” sub-menu item.

Patrol Log @ Surf Life Saving NSW

Patrol Log Belongs To:  
 Branch: Balina Shire (Lifeguards) Club: Lennox Head (Lifeguards)

Patrol Log Details:  
 Patrol Name: Voluntary Patrol | Patrol Type: Voluntary | Total Patrol Positions: 3  
 Date: 13/06/2007 | Patrol Start Time: 09:00 | Patrol Finish Time: 18:00

Retrieve Available Members From:  
 Branch: Balina Shire (Lifeguards) Club: Lennox Head (Lifeguards)  
 Include Non-Financial Members:

**Available Members**

No.	Position	Add/Remove Member	Member	Patrol Type	Add/Remove Substitute	Substitute	Start Time	Finish Time	To
1	PC	[+/-]	Jones, Lily	Rostered	[+/-]		09:00	18:00	00:00
2	VC	[+/-]			[+/-]		00:00	00:00	00:00

Figure 1.6: Add Unrostered Patrol screen.



## 16.8. Reports

Reports are used by Beaches, Councils and States to output valuable information from SurfGuard. The two report options available include standard, pre-formatted reports in the “Reports” sub-menu item and “custom Reports”, which can be custom built depending on the user requirements. There are a great number of standard reports available and these include some very specific reports that cannot be built in the custom reporting tool. An essential report available for lifeguards is the “Patrolled and/or Unpatrolled stats comparison” report. This report lists the beach statistics and compares it to previous statistics for the month, calendar year or patrol season. The user can determine how many periods to report on, for example the last 3 years, or the last 4 January’s. A small example can be seen in Figure 1.7.

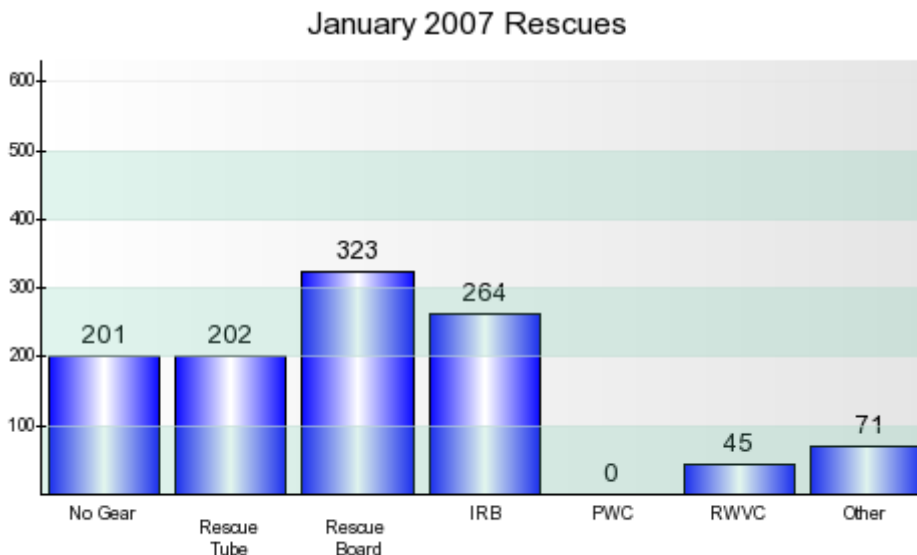


Figure 1.7: State level statistics comparison reporting screen.

Reports are used by Beaches, Councils and States to output valuable information from

- Some actions taken by Councils and/or States may overwrite entries made by Beaches.
- Only States have the authority to archive Award assessments.

- Displayed details are based on level of access.
- For those who have Council or State level administrative access, a range of different sub-menu options is available.
- The available view on most screens is expanded to include all Club information within your Council or State.



## PART 5: INCIDENT REPORTING DATABASE (IRD)

### 17. IRD

#### 17.1. About Incident Reporting

Incident reporting represents the recording of drowning, rescues, first aid etc, must occur at club level, as near as possible in timing to the occurrence of the incident, and this is currently done using a paper Incident Report Form. Previously this data was then entered into a Microsoft Access database at state centre and exported to the national office. SLSA have now developed a fully web-based system that will replace the current Microsoft Access IRD, and that conforms to the guidelines of SLSA's IT Strategic Plan. It is accessible by clubs, branches and other services, on any computer that has internet access and browser software (such as Internet Explorer or Netscape Navigator).

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) which can be found at:

<http://www.slsa.com.au/site/content/resource/00001081-docsource.pdf>

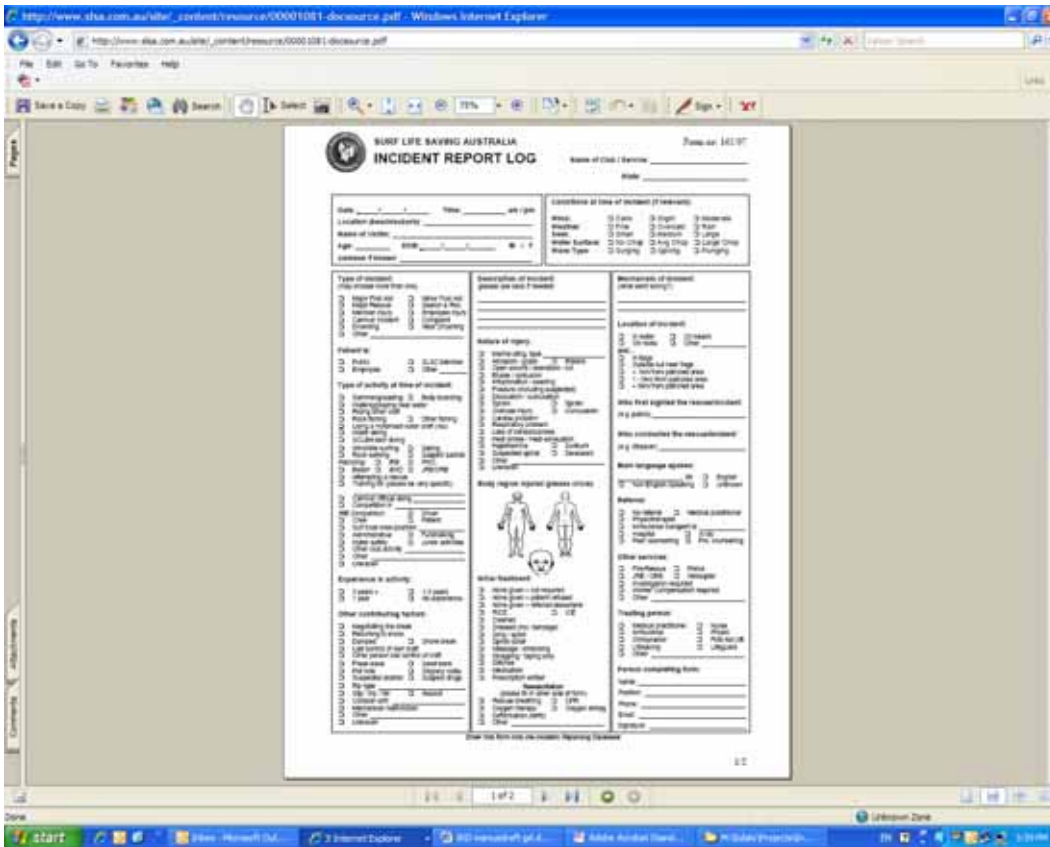
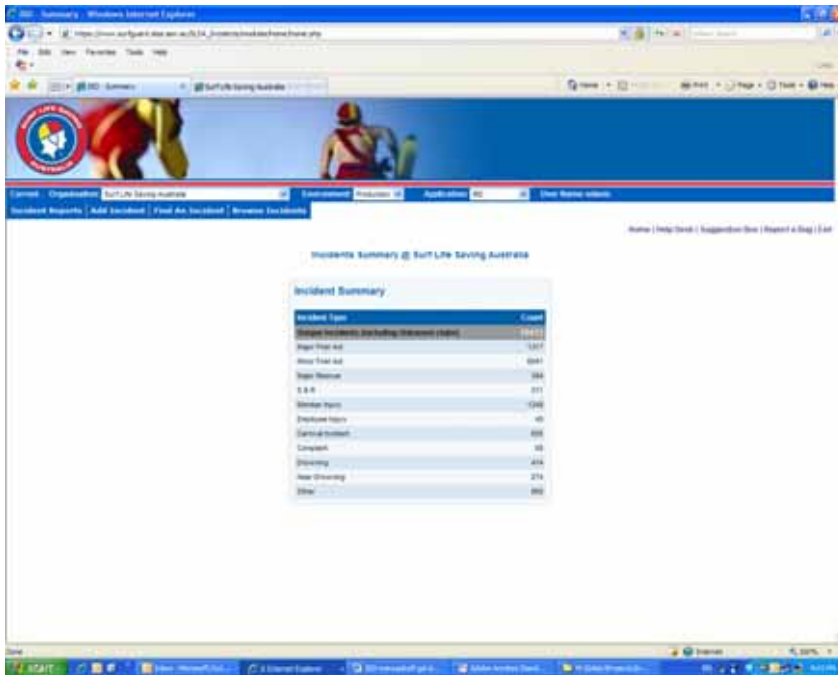


Figure 1.1: Incident report form

## 17.2. About IRD

IRD is a MySQL relational database integrated with SurfGuard to allow Users access to the IRD either via a viewable screen via a web browser or via output using the reporting function.

The database has been created using the core information from the original spreadsheets, along with additional fields and information.



**Figure 1.2: IRD after logging in**

### 17.3. Registration Information

Before attempting to login to IRD, you must have a User Account setup on your behalf. This is done by completing the SLSA form 49 located on the SLSA Admin and Resources / Form / Lifesaving area and circle IRD into the text area of the system you require:

Once you have logged on to SurfGuard, change the database name to IRD by selecting it from the Application list (see below).

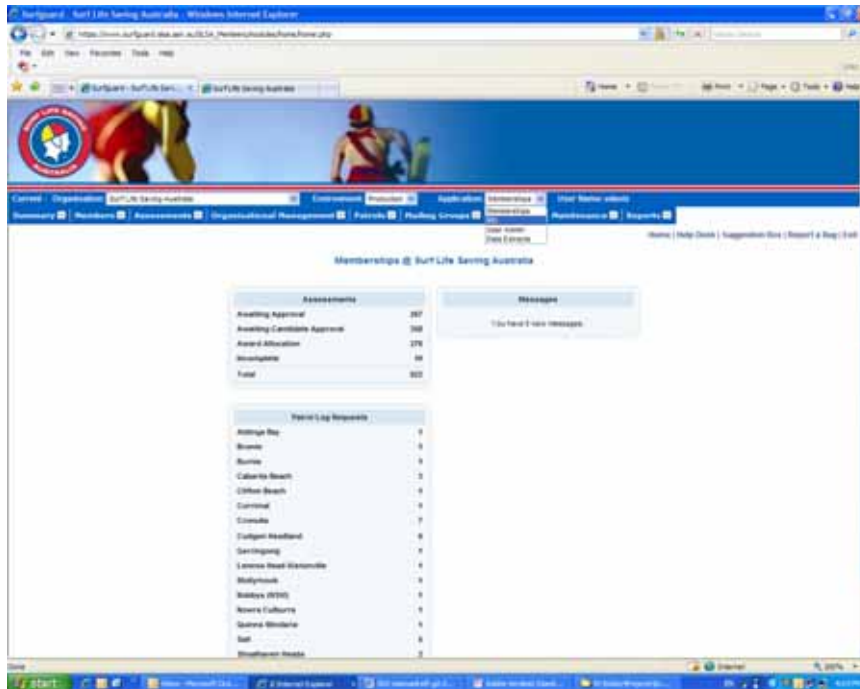


Figure 1.3: Switching to IRD

## 17.4. Security

Several layers of security have been setup in IRD. Users can have either Browse, Edit or Administration rights as well as access to data on a State by State level.

## 17.5. Data integrity

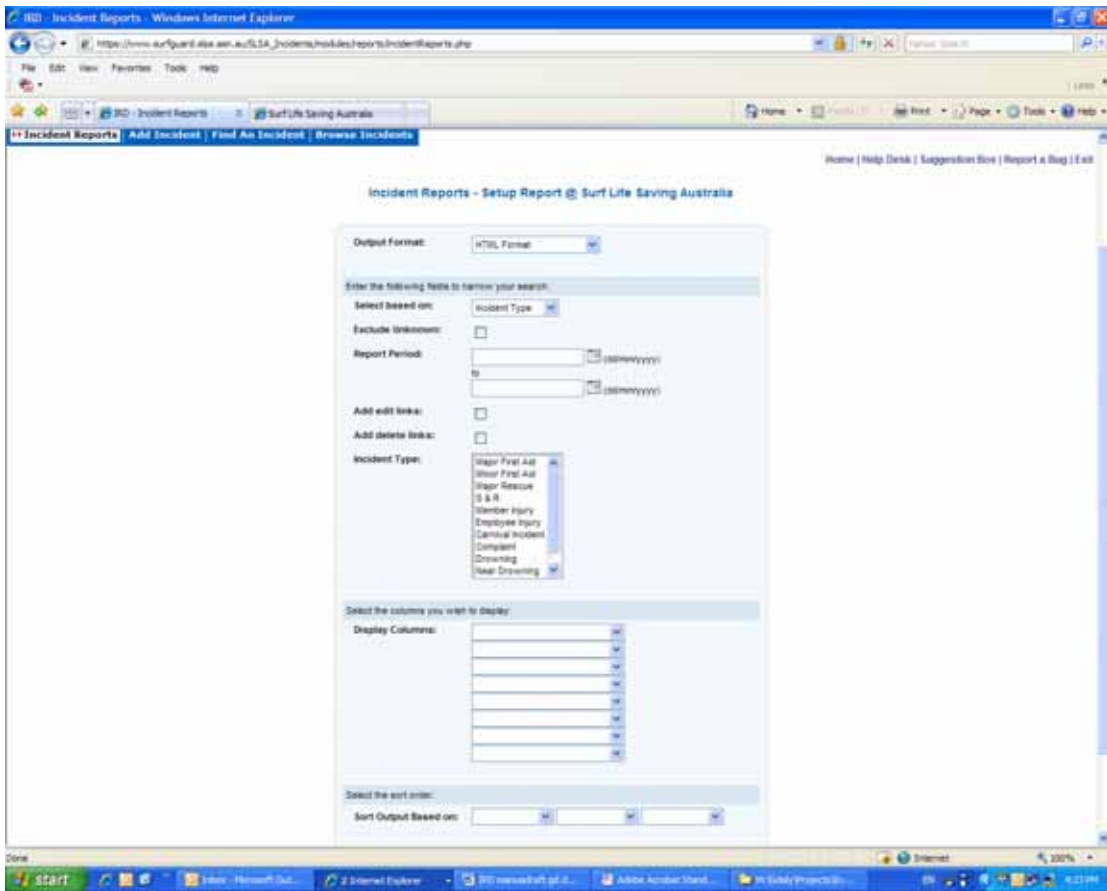
All data held within IRD has been collected over nearly 10 years and it is vital that the integrity of the data should be maintained. All data being entered or revised should be checked for accuracy before it is entered.

All data held within the IRD 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 SLSA Lifesaving Manager.



## 17.6. Incident Reports

The incident reports menu item allows the user to pre-select what fields are viewed in the browse and incident area of the IRD. The display category area allows the user to select the columns and order of the selected items.



**Figure 1.4: Incident reports selection area**

## 17.7. 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.

A screenshot of a web browser window displaying the 'Add An Incident' form for Surf Life Saving Australia. The browser is Windows Internet Explorer. The page title is 'Add An Incident @ Surf Life Saving Australia'. The form is titled 'Add An Incident @ Surf Life Saving Australia' and includes a note: 'Please enter details where known, leave unknown fields blank (HIT - Esc clears radio buttons)'. The form is divided into three main sections: 'Incident Details', 'Patient Details', and 'Prevailing Conditions'.  
**Incident Details:**  
- Club or Service: Dropdown menu (selected: Ulenahut)  
- Date: Date picker (selected: 24 Jan 2008)  
- Time (in GMT - 2hr clock): Text input field  
- Location of Incident: Text input field  
**Patient Details:**  
- Patient's Name: Text input field  
- Age: Text input field  
- DOB: Date picker  
- Patient's Gender: Radio buttons (Male/Female)  
- Street Address: Text input field  
- Team: Text input field  
- Postcode: Text input field  
- State: Radio buttons (VIC, QLD, WA, SA, TAS, NT, ACT)  
- Country: Text input field  
**Prevailing Conditions:**  
- Wind Conditions: Radio buttons (Calm, Light, Moderate)  
- Weather Conditions: Radio buttons (Fine, Overcast, Rain)  
- Sea Conditions: Radio buttons (Small, Medium, Large)  
- Water Surface: Radio buttons (No ripples, Low ripples, High ripples)

Figure 1.5: Add incident entry screen

## 17.8. Find Incident

The user can locate an incident by entering the required information into the relevant area of the find an incident screen. Enter the Club or Service, incident type or date range and the database will search for the correct response. Searched are restricted by State.

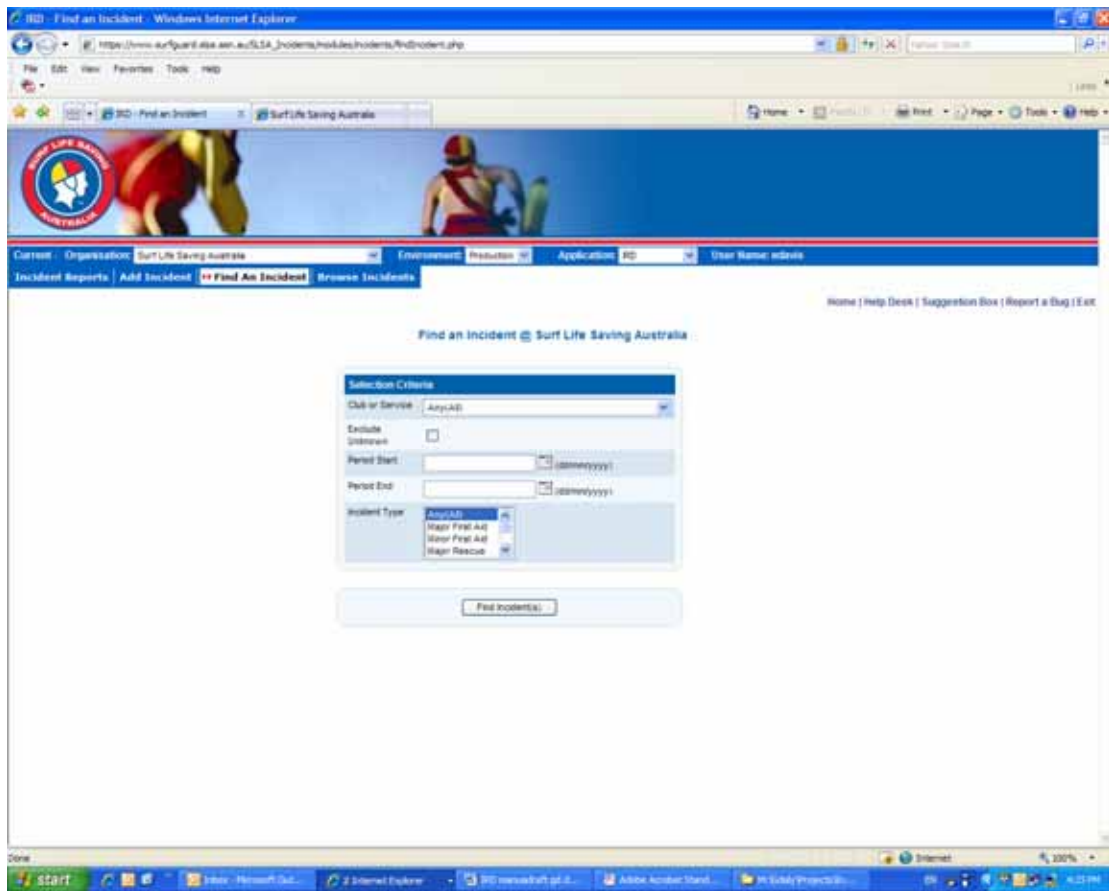


Figure 1.6: find an incident screen

## 17.9. Browse Incidents

The Browse Incidents area displays the criteria based upon the entries made in the Incidents report area.

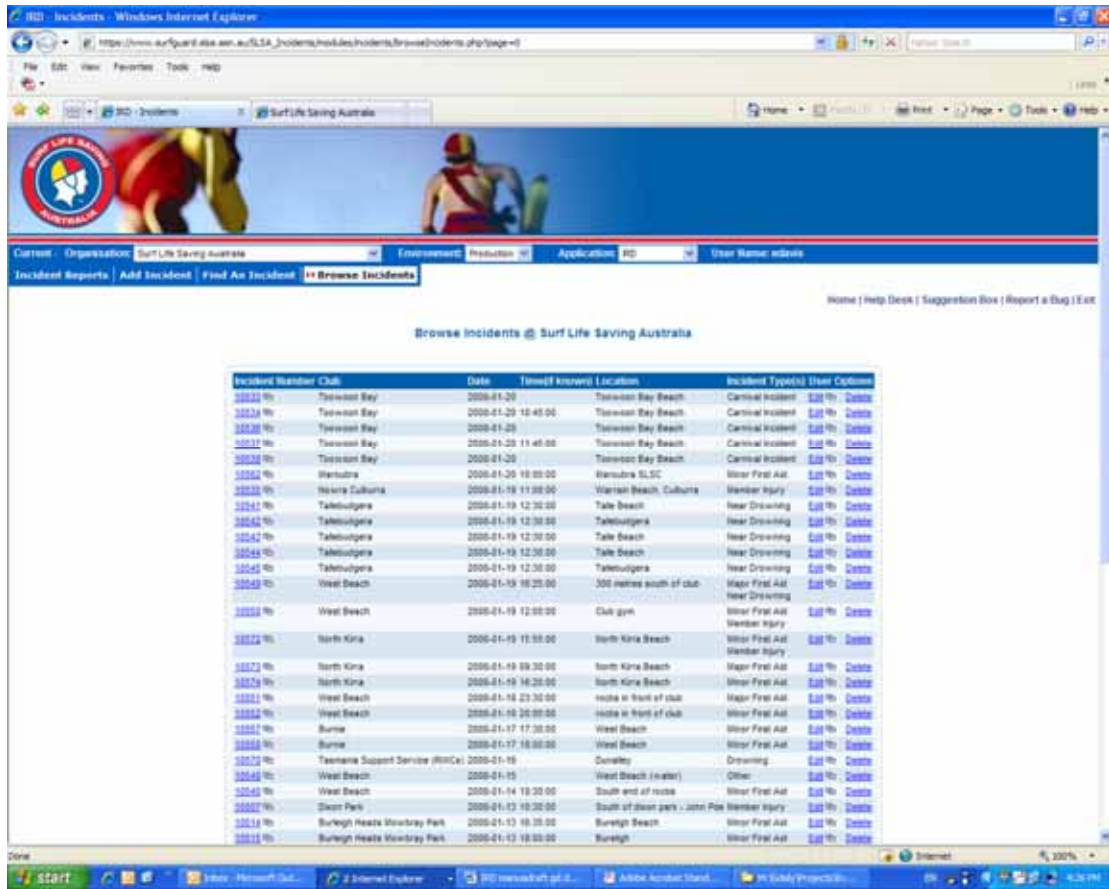


Figure 1.7: Browse Incidents

**TIPS** Browse through the screens first  
Users should know how to navigate around SurfGuard prior to using IRD

**SUMMARY** See the above



## PART 6: ASBAMP ONLINE

### 18. ABSAMP

#### 18.1. About the "Australian Beach Safety and Management Programme" - 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 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

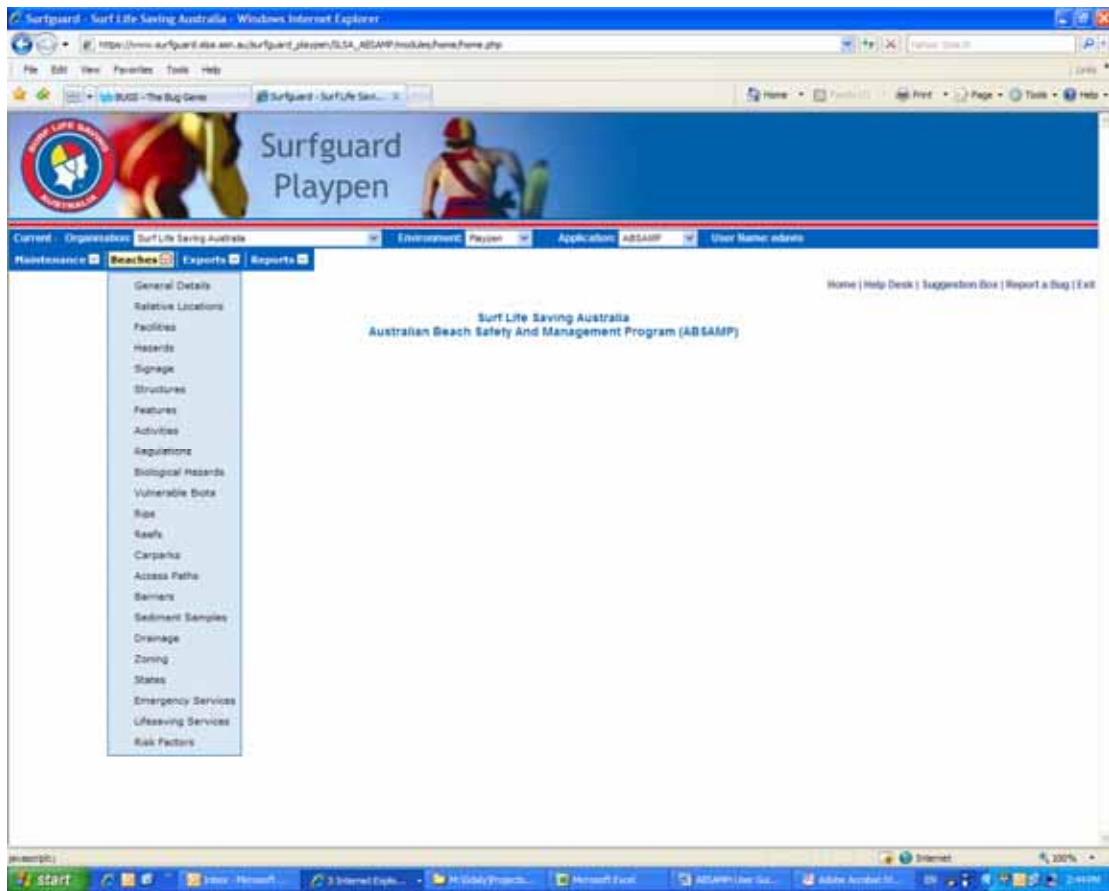
Data on each beach is acquired from a range of interrelated sources: topographic maps and aerial photographs, aerial and ground site inspections, beach conditions (produced on a daily basis by patrolling surf lifesavers filling in beach maps) and published data. All information is filed as a hard copy and all appropriate information then extracted for entry into the database.

#### 18.2. About ABSAMP online

ABSAMP online is a Postgre SQL Database integrated with SurfGuard to allow Users access to the beach information either via a viewable screen via a web browser or via output using the reporting function.

The database has been created using the core information from the original MS Access database along with additional fields and information.

The data is setup as the beach as the central hub and all other information attached to it. Each beach has a unique key identifier as have all of the attached features.



**Figure 1.1: ABSAMP online information**

### 18.3. Registration Information

Before attempting to login to ABSAMP online, you must have a User Account setup on your behalf. This is done by completing the SLSA form 49 located on the SLSA Admin and Resources / Form / Lifesaving area and write ABSAMP into the text area of the system you require:

Once you have logged on to SurfGuard, change the database name to ABSAMP by selecting it from the Application list (see below).

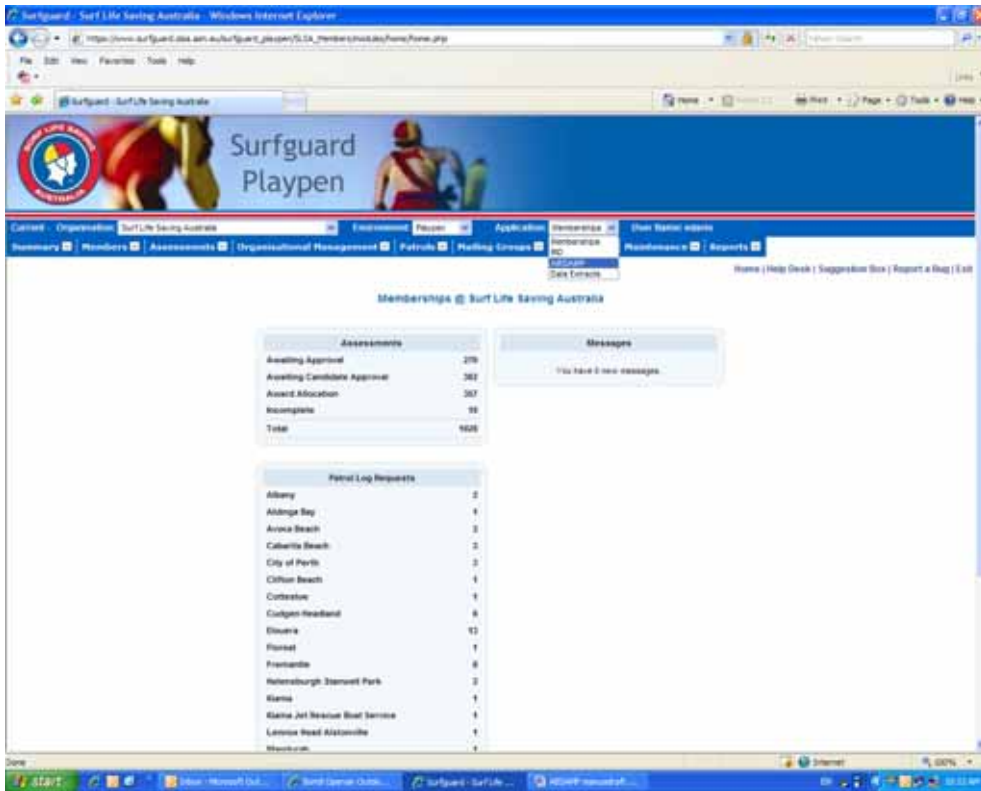


Figure 1.2: Switching to ABSAMP

## 18.4. Security

Several layers of security have been setup in ABSAMP. Users can have either Browse, Edit or Administration rights as well as access to data on a State by State level.

All access to ABSAMP will need to be approved by the SLSA Coastsafe manager.

## 18.5. 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.

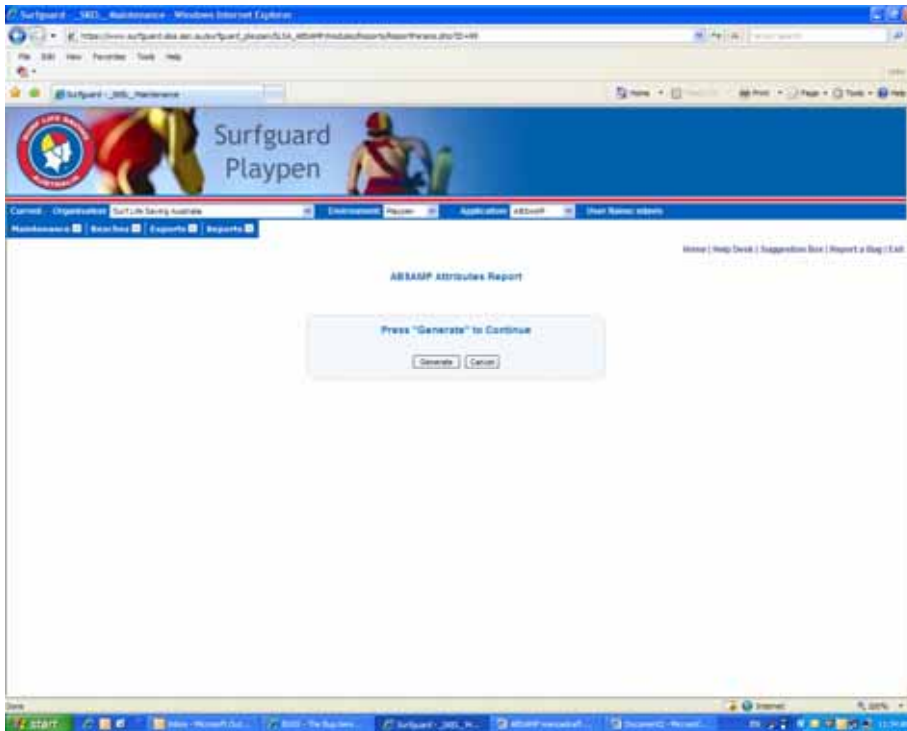




Figure 1.4: attribute values maintenance screen

## 18.8. Attribute Listing

The attribute listing generates a report that lists all fields and their attributes. To create the report click on the generate button. The output will show the list of attributes for each area of ABSAMP.



**Figure 1.5: attribute listing screen**

## 18.9. 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 on the relevant button to perform this task.

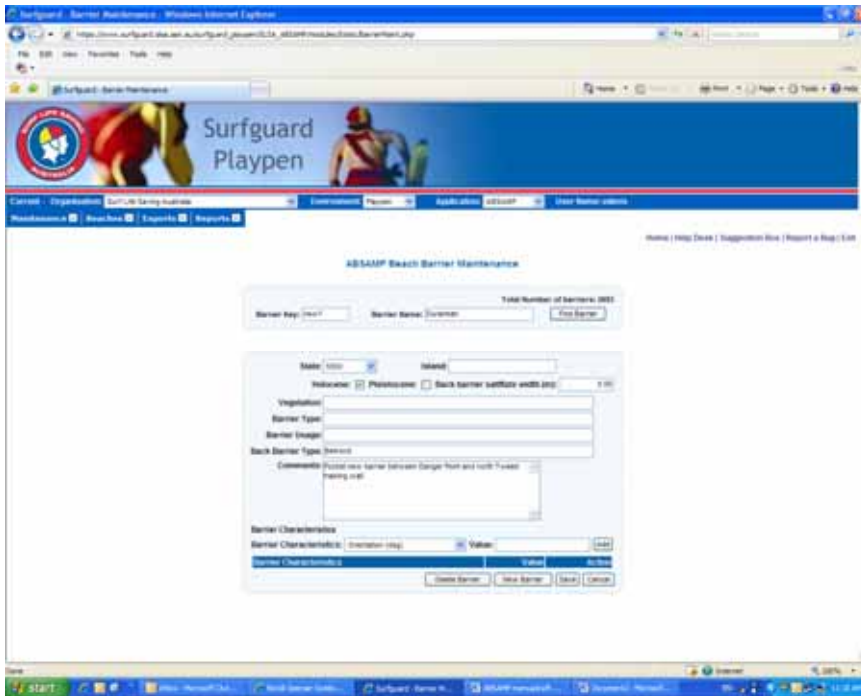


Figure 1.6: beach barrier maintenance screen

## 18.10. Beach Drainage

The beach Drainage maintenance allows a user to Find, Delete or Create a beach drainage attribute for a particular key. Click on the relevant button to use this functionality.

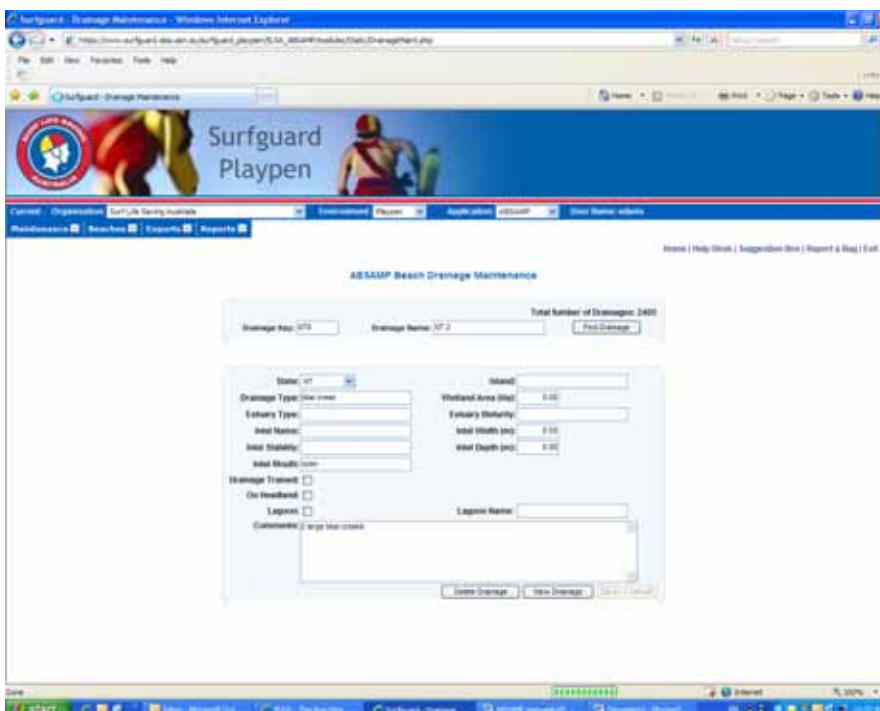




Figure 1.7: beach drainage maintenance screen

## 18.11. 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 on 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.

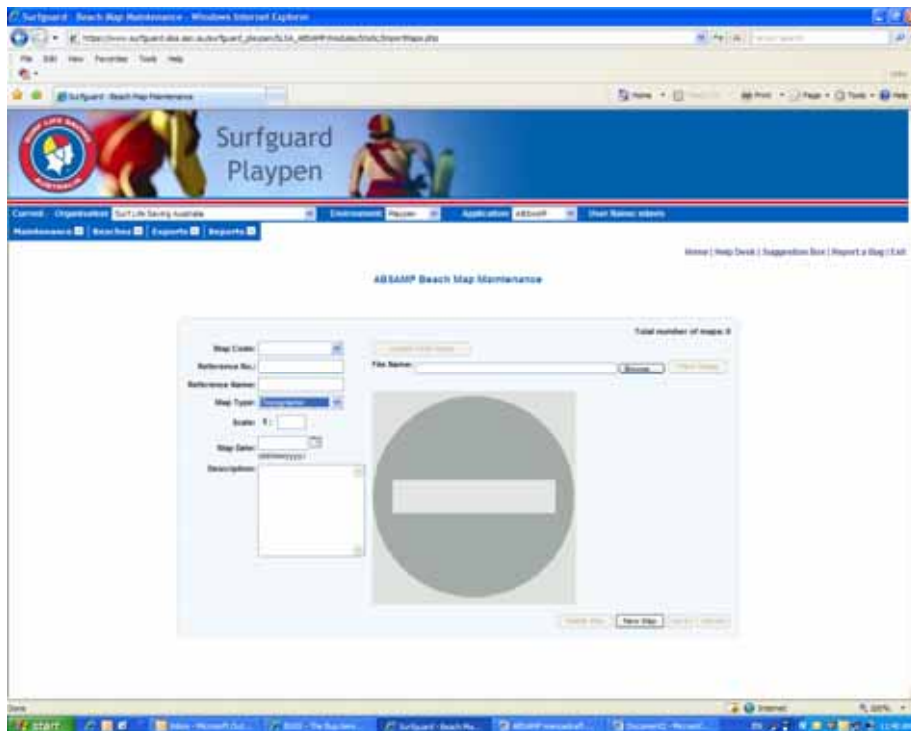


Figure 1.8: import maps screen

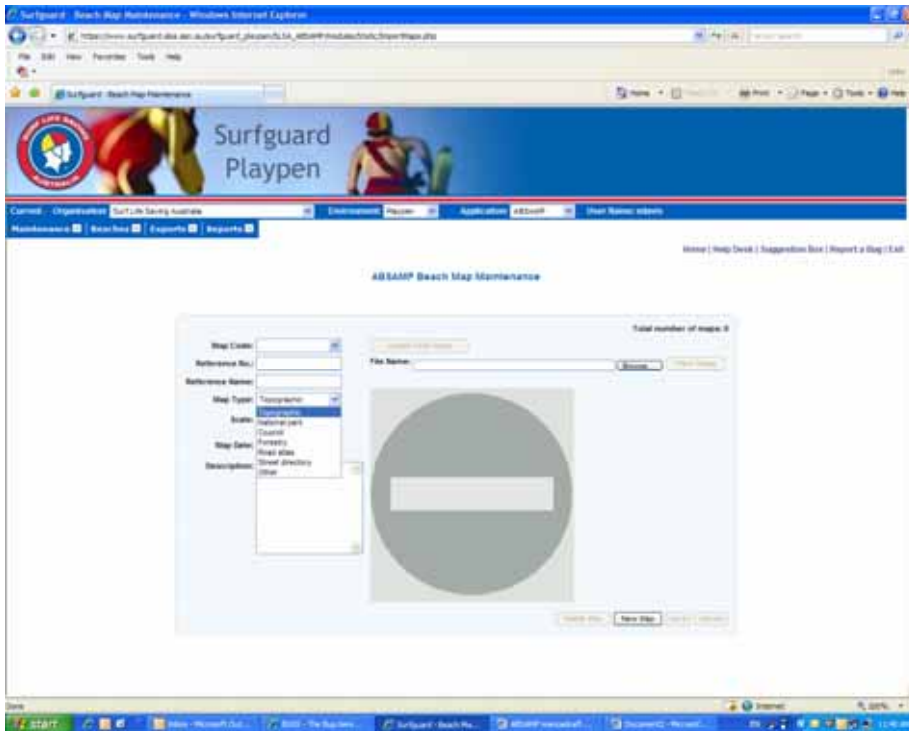


Figure 1.9: Map types shown

## 18.12. Import Photos

Photos can be imported using the Import Photos function under the maintenance menu.

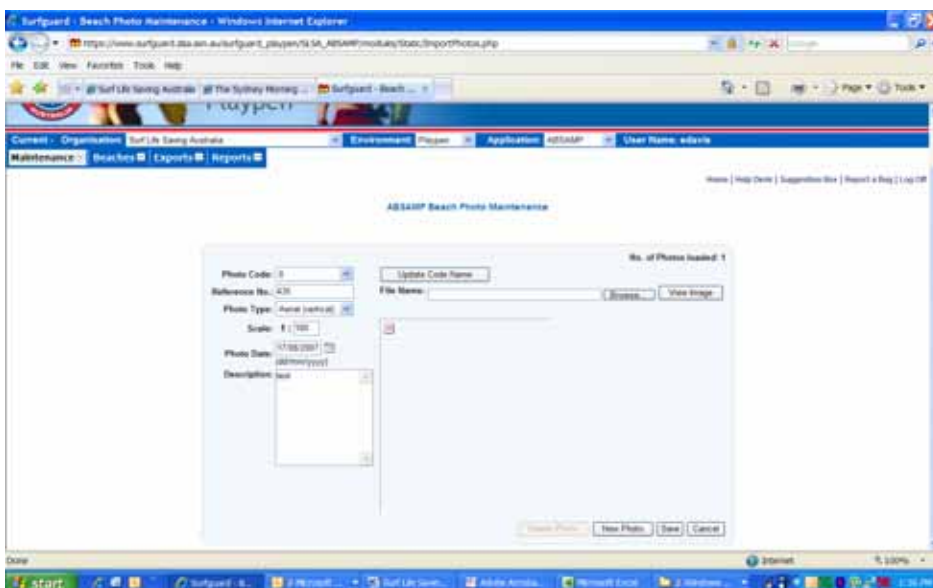


Figure 1.10: Import photos screen



## 18.13. Beach Summaries

The beach summary maintenance area will allow the user to display, update, delete and create summary descriptions. Click on the appropriate box to achieve this.

These summaries relate to swimming, surfing, fishing and general.



Figure 1.11: beach summaries maintenance screen

## 18.14. Beach Description

The beach description maintenance area will allow the user to display, update, delete and create beach descriptions. Click on the appropriate box to achieve this.



Figure 1.12: beach description maintenance screen

## 18.15. 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 on 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.

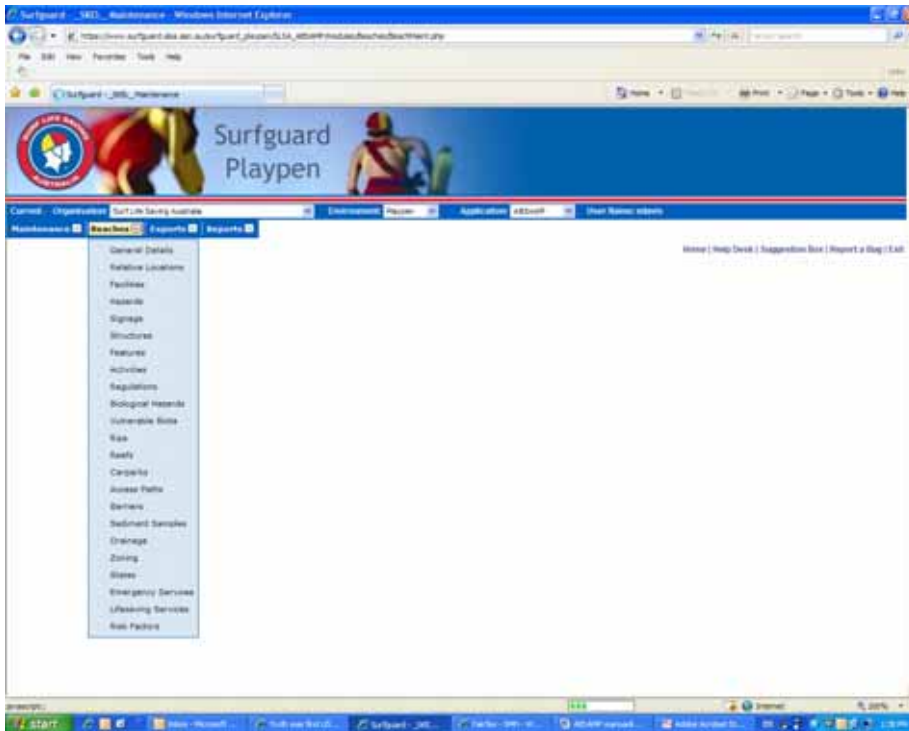


Figure 1.13: beach function dropdown menu



Figure 1.14: general beaches details screen



A table summarising the information held in each beaches area of ABSAMP is below:

Beaches item	Fields Summary
General Details	Description, Public transport, Measurements, Lat and Long, Hazards, Reefs, Attaching summaries
Relative Locations	Location type, name, distance
Facilities	Type, number, distance comments
Hazards	Type, location, Lat/Long, Risk, comments
Signage	Type, location, symbol, hazard, lat/long
Structures	Type, details, manager
Features	Type, location, details
Activities	Type, clashes with
Regulations	List of applicable regulations
Biological Hazards	Type, season, comments, control
Vulnerable Biota	Type, evidence, counts, comments
Rips	Type, number, spacing
Reefs	Type, location, width
Carparks	Type, name, distance, visible
Access Paths	Type, location, start and end lat/long, hazards, access types, distance
Barriers	Type
Sediment Samples	Type, location, sample, distance, lat/long, position, gradient, comments
Drainage	Type, crossing location
Zoning	Type, name, manager
States	Type, tide, locations
Emergency Services	Type, distance, response time
Lifesaving Services	Type, provider, manager
Risk Factors	Visitation, Lifesaving services

## 18.16. Exports

The export function allows users to select any number of combinations of fields and export then as a variety of outputs.

Each area is expandable by clicking on 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.

Expanded data fields are shown below.



Custom Exports - Windows Internet Explorer

Playpen

Current: Organisation Surf Life Saving Australia Environment People Application AUSAAP User Name: admin

Home | Help Desk | Suggestion Box | Report a Bug | Exit

### Custom Exports

File Name:  Generate Export

Delimited By:  Comma  Pipe  Include Column Headers:

Include Column?	Sort Order	Column Header	Selection Criteria
<input type="checkbox"/> Beach Search Details	Field Selected		Beach Key: <input type="text"/> Beach Name: <input type="text"/> State: ALL Branch: <input type="text"/> Hazard Rating: From <input type="text"/> To <input type="text"/>
<input type="checkbox"/> Services	Field Selected		Show Services
<input type="checkbox"/> Council	Field Selected		Show Council
<input type="checkbox"/> Geography	Field Selected		Show Geography
<input type="checkbox"/> Environment	Field Selected		Show Environment
<input type="checkbox"/> Assets & Risks	Field Selected		Show Assets & Risks

Custom Exports - Windows Internet Explorer

Surf Life Saving Australia  
Surfguard  
Playpen

Current: Organisation Surf Life Saving Australia Environment People Application AUSAAP User Name: admin

Home | Help Desk | Suggestion Box | Report a Bug | Exit

### Custom Exports

File Name:  Generate Export

Delimited By:  Comma  Pipe  Include Column Headers:

Include Column?	Sort Order	Column Header	Selection Criteria
<input type="checkbox"/> Beach Search Details	Field Selected		Show Beach
<input type="checkbox"/> Services	Field Selected		Show Services
<input type="checkbox"/> Surf Club			Surf Club: <input type="text"/> Show Surf Club
<input type="checkbox"/> Emergency Services			Emergency Service: <input type="text"/> Show Emergency Service
<input type="checkbox"/> Littering Services			Littering Service: <input type="text"/> Show Littering Service
<input type="checkbox"/> Service Stations			Service Station: <input type="text"/> Show Service Station
<input type="checkbox"/> Council	Field Selected		Show Council
<input type="checkbox"/> Geography	Field Selected		Show Geography
<input type="checkbox"/> Environment	Field Selected		Show Environment
<input type="checkbox"/> Assets & Risks	Field Selected		Show Assets & Risks



MSMP - Custom Exports - Windows Internet Explorer

Surfguard Playpen

Home | Help Desk | Support Site | Report a Bug | Exit

### Custom Exports

File Name:

Default By:  Column  File ID  Include Column Headers

Include Column?	Sort Order	Column Header	Selection Criteria
<input checked="" type="checkbox"/>	Basic Search Details	Field Selected	<input type="button" value="Show Basic"/>
<input checked="" type="checkbox"/>	Services	Field Selected	<input type="button" value="Show Services"/>
<input checked="" type="checkbox"/>	Council	Field Selected	<input type="button" value="Show Council"/>
<input type="checkbox"/>	Facilities		Facility: <input type="text"/> Select Facility
<input type="checkbox"/>	Structures		Structure: <input type="text"/> Select Structure
<input type="checkbox"/>	Regulations		Regulation: <input type="text"/> Select Regulation
<input type="checkbox"/>	Accessions		
<input type="checkbox"/>	Signage		
<input type="checkbox"/>	Public Transport		Public Transport: <input type="text"/> Select Public Transport
<input type="checkbox"/>	Activities		Activity: <input type="text"/> Select Activity
<input checked="" type="checkbox"/>	Geography	Field Selected	<input type="button" value="Show Geography"/>
<input checked="" type="checkbox"/>	Environment	Field Selected	<input type="button" value="Show Environment"/>
<input checked="" type="checkbox"/>	Records & Notes	Field Selected	<input type="button" value="Show Notes &amp; Records"/>

MSMP - Custom Exports - Windows Internet Explorer

Surfguard Playpen

Home | Help Desk | Support Site | Report a Bug | Exit

### Custom Exports

File Name:

Default By:  Column  File ID  Include Column Headers

Include Column?	Sort Order	Column Header	Selection Criteria
<input checked="" type="checkbox"/>	Basic Search Details	Field Selected	<input type="button" value="Show Basic"/>
<input checked="" type="checkbox"/>	Services	Field Selected	<input type="button" value="Show Services"/>
<input checked="" type="checkbox"/>	Council	Field Selected	<input type="button" value="Show Council"/>
<input checked="" type="checkbox"/>	Geography	Field Selected	<input type="button" value="Show Geography"/>
<input type="checkbox"/>	Barriers		
<input type="checkbox"/>	Health Locations		
<input type="checkbox"/>	Features		
<input type="checkbox"/>	Beach Coordinates		
<input type="checkbox"/>	Phone		
<input type="checkbox"/>	Map		
<input type="checkbox"/>	Design		
<input checked="" type="checkbox"/>	Environment	Field Selected	<input type="button" value="Show Environment"/>
<input checked="" type="checkbox"/>	Records & Notes	Field Selected	<input type="button" value="Show Notes &amp; Records"/>

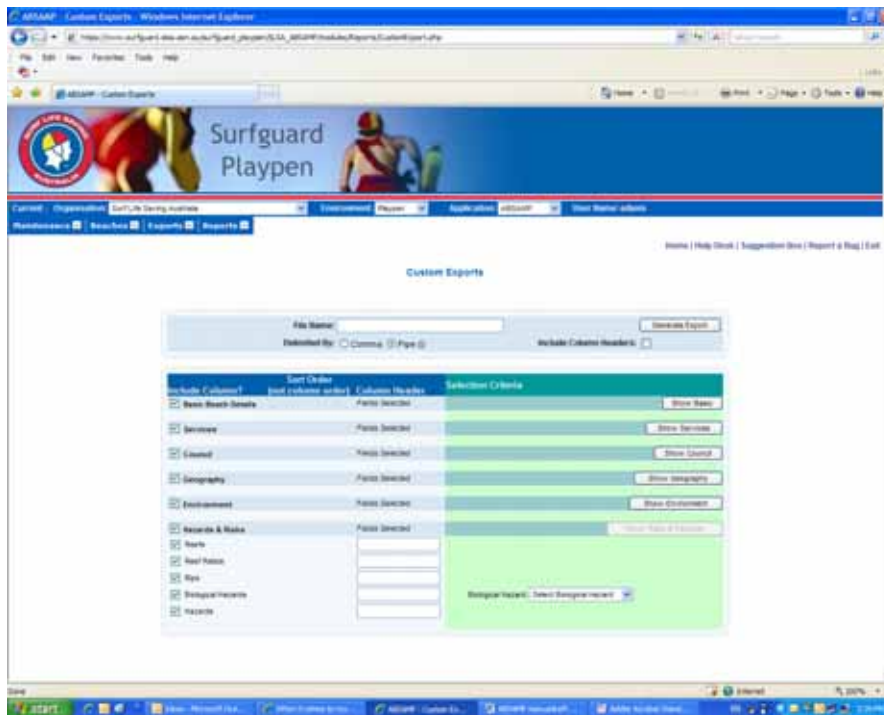
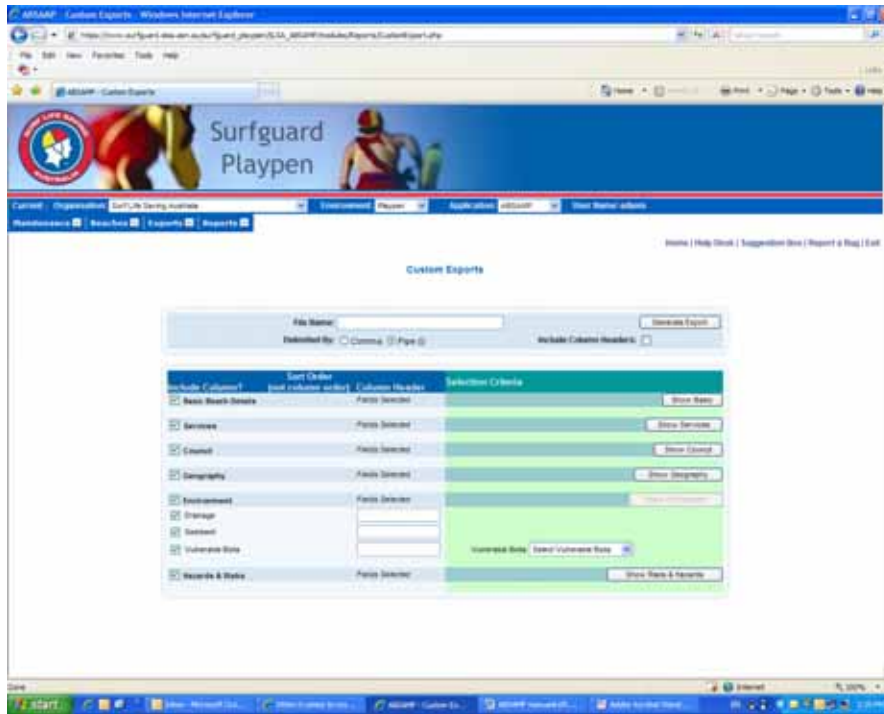


Figure 1.15: exports fields



## 18.17. Reports

The reports area allows users to run a series of pre-setup reports and display them to a screen for printing. Below show the list of reports.

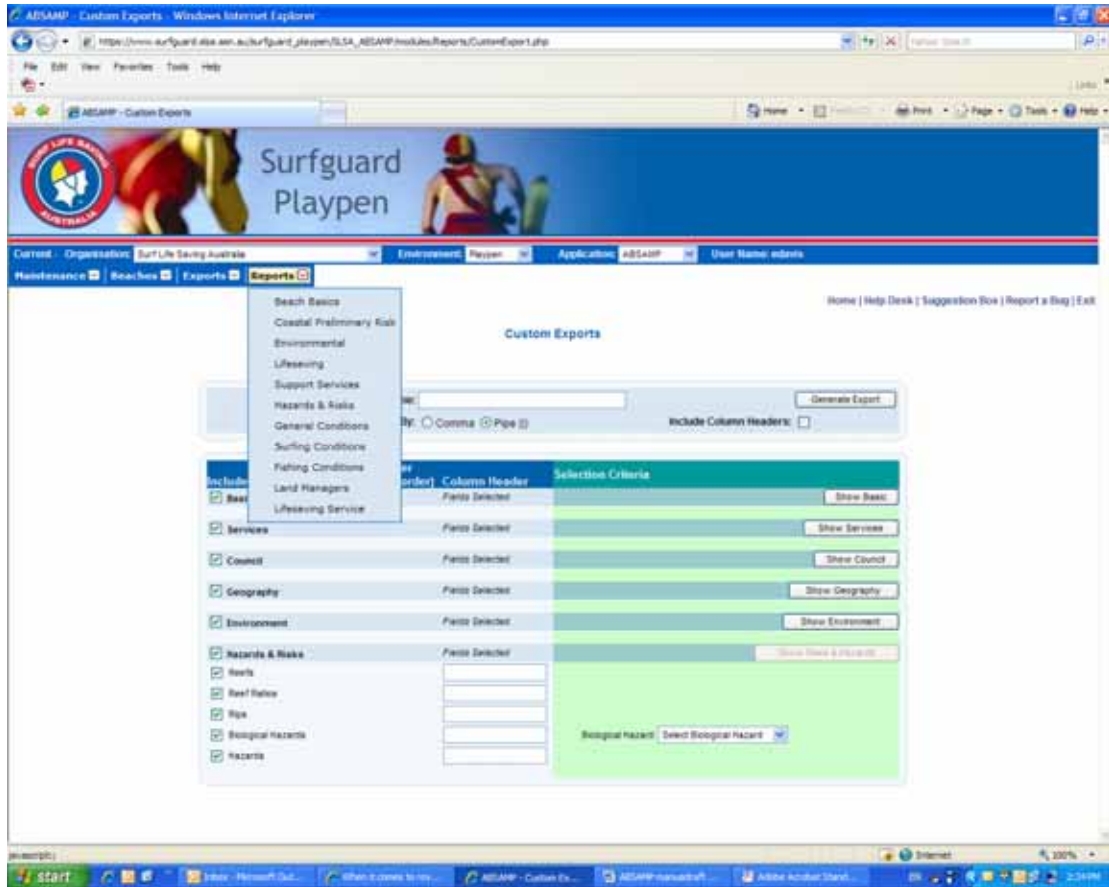


Figure 1.16: Reports selection

T  
I  
P  
S

Browse through the screens first  
Users should know how to navigate around SurfGuard prior to using ABSAMP

S  
U  
M  
M  
A  
R  
Y

See the above



## 19. Glossary of Terms

### **Archived**

The assessment is complete and all administrative reporting is also complete

### **Authorise Patrol Log Request**

A sub-menu option that allows you to view and action any pending Patrol Log requests. This includes re-opening requests and deleting requests. You can also request a status of Waiting, Accepted, Rejected or Cancelled.

### **Award**

Upon the successful completion of an assessment, the member is allocated a new award.

### **Awaiting Approval**

The assessment has been submitted for approval by branch or state. This step is skipped for proficiencies.

### **Awaiting Candidate Approval**

The results have been entered for the members. Branch or state needs to approve the results and may also amend any of the results. A Proficiency assessment is completed once this stage has been actioned.

### **Award Number**

Branch or state has approved the member results. State needs to allocate the awards. They may input manual award allocation numbers at this stage. This step is skipped for proficiencies.

### **Button**

An interface icon that allows a user to access a specific action.

### **Check-box**

An interface icon that allows a user to turn on or off a specific feature by clicking on a square or box. The feature is active when a tick appears within the square.

### **Credit Transfer**

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.

### **Drop-down**

A list of options from a pre-determined set of data (e.g. Menu membership status).

### **Exam Approved**

The assessment has been approved by the branch or state. The club can now hold the assessment and enter the results for the members.



### **Exam Cancelled**

The assessment has been deleted by the branch or state assessment can be deleted by branch of state at any stage before the awards are allocated. A club can only cancel/delete an assessment before it is submitted for approval by branch or state.

### **Exam Rejected**

The assessment has been rejected by the branch or state. The assessment will not take place and it can now be archived.

### **Hyperlink**

A navigation tool that takes users to specific information screens. Hyperlinks are indicated by alternative print colour and underlining of text, as well as a cursor change when the mouse rolls over the hyperlink.

### **Incomplete Status**

The assessment has not been submitted for approval by branch or state. The club is still able to modify any of the assessment details.

### **Logon**

To enter personal details and a pre-determined password which allows access to SurfGuard.

### **Mailing Groups**

Mailing Groups are used for creating groups of members for the purpose of mail-outs. Each mailing group must be created under a Mailing Group Type. The mailing group type is the main category that the groups will fall under.

### **Mail-Outs & Reports**

For all mail-outs or Mailing Group reports, go to the Reports Section.

### **Navigate**

To move from one screen or web page to another. This can be done by using the forward or back arrows or by clicking on menu items or hyperlinks.

### **New Mailing Group Type**

This will create a new type of Mailing group (e.g. a Family group, a Patrol group, a social group).

### **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.

### **Recognition of Prior Learning**

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. Also referred to as Recognition of Current Competence.



## 20. Annexes

A – SurfGuard Registration Form (SLSA F049)

