



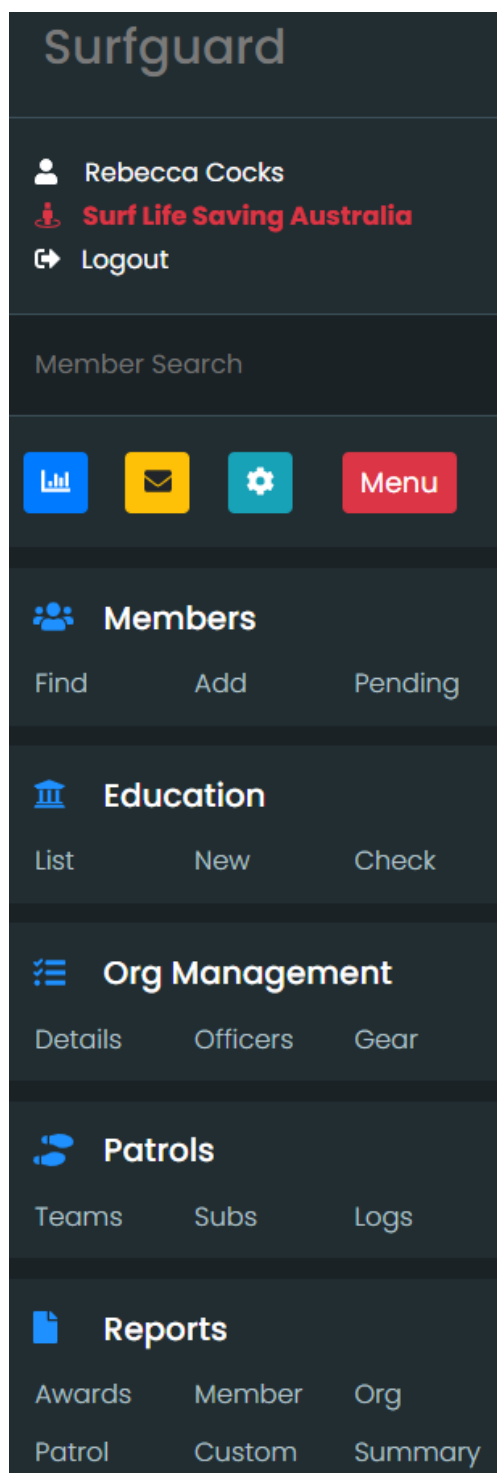
## Surf Life Saving Australia - Circular

|                     |   |
|---------------------|---|
| <b>Title:</b>       | Update on SLSA IT System – Surfguard  |
| <b>Document ID:</b> | Circular 27/2021-22   |
| <b>Audience:</b>    | SLSA Club/Branch/State/National Officers & Administrators                       |
| <b>From:</b>        | National ICT Unit   |
| <b>Date:</b>        | 15 November 2021  |
| <b>Summary:</b>     | New Surfguard User Interface<br>Ability for States to schedule member Archiving |



## New Surfguard User Interface

Surfguard has been given a new look and feel. Changes are as follows



### 1. New Login Screen

### 2. New Menu

The menu now displays on the Left-Hand Side (LHS) of the screen and provides links to the most common pages.



The user who is logged in shows at the top of the menu, click the Users name to

- \* Change organisation

- \* Change to IRD, ABSAMP or User Admin

- \* Reset User password



Indicates the name of the organisation you are currently viewing

**Member Search** – search by Member ID or Name



Display main Dashboard



Email/SMS Function



View Maintenance Options



Click to view all available Menu Items

The most viewed pages can be accessed from the LHS menu

**Members** – Find, Add & Pending Requests

**Education** – List, New & Qualification Check

**Org Management** – Details, Officers & Gear

**Patrols** – Teams, Subs, Logs

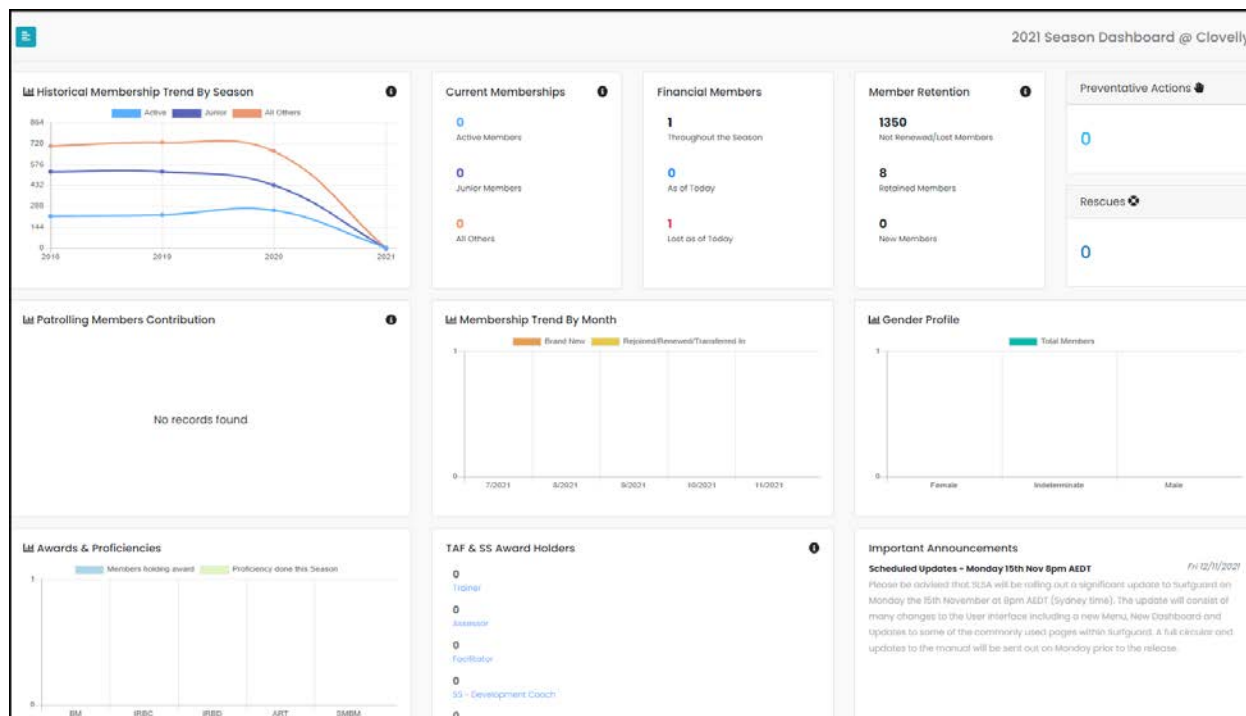
**Reports** – Awards, Members, Org, Patrol, Custom & Summary



To hide the LHS menu



### 3. New Dashboard



#### Historical Membership Trend by Season

A multi-year trend showing all memberships for the current season and previous 3 seasons. All sub-membership categories have been grouped into 3 sections (Active, Junior and Other) and detailed grouping information can be shown by hovering over the 'i' in the top right corner of the dashboard item. It's important to note that these figures are based on all memberships that have ever been registered for the given season, if the member was active and financial for even a small part of the season.

#### Current Memberships

Using the same groupings as the previous graph, a breakdown of currently active financial members

#### Financial Members

A high level look at the number of currently active financial members (as of today) compared to the total number of members who have ever been registered for the current season (throughout season), lastly showing the difference whereby identifying how many people were previously active members this season however are not now (lost as of today).

#### Member Retention

Doing a direct comparison between active financial members for the previous season and the current season, this dashboard item identifies how many of these members were lost and/or didn't renew from the previous season, how many were retained (registered for both seasons) and how many are new (were not registered last season however are registered this season).



### **Preventative Actions & Rescues**

The total number of preventative actions and rescues this season

### **Patrolling Members Contribution**

Breakdown showing the patrol hours that active financial members have attained. Important note, the non-contributing members sector of the graph indicates the number of members in the 'Active' main category (from 1<sup>st</sup> and 2<sup>nd</sup> dashboard item groupings) who have not gained any patrol hours during this current season.

### **Membership Trend by Month**

Showing the number of members who have either joined as a new member or renewed/rejoined or transferred in, results are split up for each month within the current season to identify periods when renewals etc are high/low.

### **Gender Profile**

A gender breakdown for all currently active financial members

### **Awards & Proficiencies**

Shows the count of active members for the current season who hold the awards & are proficient in that award. Note for ART they may hold one of the three current ART awards.

- Advanced Resuscitation Techniques (AID)
- Advanced Resuscitation Techniques
- Advanced Resuscitation Techniques Certificate

### **TAF & SS Award Holders**

This will show the count of active members for the current season who are proficient in the award groups shown.

### **Important Announcements**

Communication tool for important updates or scheduled system outages

The **old dashboard** can be viewed [Menu > Summary > Dashboard](#)



## 4. What pages have the new look and feel?

### Find Member

### Find Member

Member ID

First Name

Last Name

Mobile

Email

Include active records

Include archived records

**More Filters**

**Submit** **Reset**

Click More Filters to display additional options

### Find Member

Member ID

First Name

Last Name

Mobile

Home Phone

Email

Date of Birth - From

Date of Birth - To

Competitor

Include active records

Include archived records

Include suspended records

Include deceased records

Include expelled records

Only members with awards

Only members with patrol data

Only members with pending member requests

Only members with notes

Only members with documents

Check this to search on part of name

Records Per Page

**Less Filters**

**Submit** **Reset**



## Pending Members Requests

| Request ID | Request Date        | Member ID | Member Name          | Sub-Membership Category | Season    | Request Type            | Request Status | Links |
|------------|---------------------|-----------|----------------------|-------------------------|-----------|-------------------------|----------------|-------|
| 998428     | 20/07/2021 19:44:16 | 5980672   | Pristavok, Leon Hari | Probationary            | 2021/2022 | New                     | Pending        | ?     |
| 998534     | 21/07/2021 09:16:53 | 5924593   | Davey, Chick         | General                 | 2020/2021 | Update Personal Details | Pending        | ?     |

| Request ID | Request Date        | Member ID | Member Name          | Sub-Membership Category | Season    | Request Type            | Request Status | Links |
|------------|---------------------|-----------|----------------------|-------------------------|-----------|-------------------------|----------------|-------|
| 998428     | 20/07/2021 19:44:16 | 5980672   | Pristavok, Leon Hari | Probationary            | 2021/2022 | New Club Membership     | Pending        | ?     |
| 998534     | 21/07/2021 09:16:53 | 5924593   | Davey, Chick         | General                 | 2020/2021 | Update Personal Details | Pending        | ?     |
| 998671     | 21/07/2021 13:02:11 | 5960705   | Dawson, Lennox       | Probationary            | 2021/2022 | New Club Membership     | Pending        | ?     |
| 998672     | 21/07/2021 13:03:13 | 5960705   | Dawson, David        | Probationary            | 2021/2022 | New Club Membership     | Pending        | ?     |

| Request ID | Request Date        | Member ID | Member Name   | Sub-Membership Category | Season    | Request Type            | Request Status | Links |
|------------|---------------------|-----------|---------------|-------------------------|-----------|-------------------------|----------------|-------|
| 998674     | 21/07/2021 13:03:13 | 5790825   | Dawson, Shono | General                 | 2021/2022 | New Family Group Member | Pending        | ?     |

Total Records: 26

Actions: Manually Process/View Request(s) | Accept Request(s) | Reject Request(s)

| Request ID | Request Date        | Member ID | Member Name   | Sub-Membership Category | Season    | Request Type            | Request Status | Links |
|------------|---------------------|-----------|---------------|-------------------------|-----------|-------------------------|----------------|-------|
| 998674     | 21/07/2021 13:03:13 | 5790825   | Dawson, Shono | General                 | 2021/2022 | New Family Group Member | Pending        | ?     |

Total Records: 26

Actions: Manually Process/View Request(s) | Accept Request(s) | Reject Request(s) | Archive Request(s)



## Assessment Request List

Assessment Request List @ Clovelly

Assessment Status:  Assessment Type:  Award Type:  Award:  Hide Filters Clear Q

Proposed Date - From:  Proposed Date - To:  Activity Start Date - From:  Activity Start Date - To:  Assessment ID:

Source Company:

| ID     | Award/Qualification/UOC  | Assessment Type | Organisation | No. of Members | Proposed Assessment Date | Activity Start Date | Status                      | Action  |
|--------|--|-----------------|--------------|----------------|--------------------------|---------------------|-----------------------------|---|
| 748525 | Gear and Equipment Auditor (Club Endorsed)                                     | Award           | Clovelly     | 1              | 14/07/2021               | 14/07/2021          | Complete                    | <a href="#">Enrolment Form</a><br><a href="#">Export Results Form 14</a><br><a href="#">Print Attendance Sheet</a><br><a href="#">Print SLISA Certificate</a> |
| 748349 | Resuscitation [AID]<br>Provide cardiopulmonary resuscitation [CPR] (HLTAID001) | Award           | Clovelly     | 1              | 16/07/2021               | 05/07/2021          | Approved                    | <a href="#">Process Results</a><br><a href="#">Enrolment Form Form 14</a><br><a href="#">Print Attendance Sheet</a>   |
| 748681 | TAF Pre-season Online 2021   | Award           | Clovelly     | 5              | 19/10/2021               | 19/10/2021          | Complete                    | <a href="#">Enrolment Form</a><br><a href="#">Export Results Form 14</a><br><a href="#">Print Attendance Sheet</a><br><a href="#">Print SLISA Certificate</a> |
| 747592 | Training Officer Bronze Medallion  | Award           | Clovelly     | 1              | 01/07/2021               | 11/05/2021          | Awaiting Candidate Approval | <a href="#">Enrolment Form Form 14</a><br><a href="#">Print Attendance Sheet</a>  |

Total Records: 4

Actions:

## Patrol Logs

Patrol Logs View @ Soldiers Beach

Log Status:  Patrol Date (From):  Patrol Date (To):  Patrol Name Contains:  Q

| Organisation   | Date           | Beach | Patrol Name      | Start Time | Finish Time | Status | Days Open | Actions  |
|----------------|----------------|-------|------------------|------------|-------------|--------|-----------|--|
| Soldiers Beach | Sun 07/11/2021 |       | Voluntary Patrol | 09:00      | 18:00       | Open   | 5         | <a href="#">Edit</a> <a href="#">Print</a> <a href="#">View</a> <a href="#">Add</a> <a href="#">Lock</a> <a href="#">Refresh</a> |
| Soldiers Beach | Sun 07/11/2021 |       | 05               | 09:00      | 13:00       | Open   | 5         | <a href="#">Edit</a> <a href="#">Print</a> <a href="#">View</a> <a href="#">Add</a> <a href="#">Lock</a> <a href="#">Refresh</a> |
| Soldiers Beach | Sat 06/11/2021 |       | 01               | 09:00      | 20:00       | Open   | 6         | <a href="#">Edit</a> <a href="#">Print</a> <a href="#">View</a> <a href="#">Add</a> <a href="#">Lock</a> <a href="#">Refresh</a> |

Total Records: 3

Actions:



## Ability for State Centre's to Archive All Members on a Set Date

States now have the option to set a date in Surfguard to Archive all members who have not renewed for the current season. They can also select the number of emails that are sent to members advising them that this will occur. An email will also be sent to the person assigned to the following officer positions (President, Administration & Lifesaving) for that club advising all the people who will be archived on the date set.

The email will NOT be sent to members who have a current pending membership renewal request or have marked 'Do Not Send Email' in their membership profile. Once archived the member will not be covered by any insurance and will be removed from: -

- Internal Memberships
- Mailing Groups
- Patrol Teams
- Patrol substitution requests linked to archiving members in their specific teams
- Committees/Boards
- Officer Positions (here, it marks the archiving date as the 'To' date for the archiving member's officer position)

### How to setup the Archiving in Surfguard

Select Menu > Maintenance > Scheduled Jobs

1. Set the date for Archiving
2. Tick the boxes next to the email notifications you wish to send, options are 3 weeks prior, 2 weeks prior, 1 week prior and 1 day prior.

Update Schedule Job Settings @ Surf Life Saving NSW

Archiving old members

| Setting               | Value                              | Description   |
|-----------------------|------------------------------------|---|
| Job Date:             | <input type="text" value="08/11"/> | (dd/mm) On this date, all the old members will be marked archived in their clubs.   |
| Notify 3 Weeks Prior: | <input type="checkbox"/>           | Renewal reminder emailed to the member advising that their membership will be archived on the job date.   |
| Notify 2 Weeks Prior: | <input type="checkbox"/>           | Renewal reminder emailed to the member advising that their membership will be archived on the job date AND also email the person assigned to the following officer positions (President, Administration & Lifesaving) for that club advising all the people who will be archived on the job date. |
| Notify 1 Week Prior:  | <input type="checkbox"/>           | Renewal reminder emailed to the member advising that their membership will be archived on the job date AND also email the person assigned to the following officer positions (President, Administration & Lifesaving) for that club advising all the people who will be archived on the job date. |
| Notify 1 Day Prior:   | <input type="checkbox"/>           | Renewal reminder emailed to the member advising that their membership will be archived on the job date AND also email the person assigned to the following officer positions (President, Administration & Lifesaving) for that club advising all the people who will be archived on the job date. |





## Email to Member

Dear xxxxxxx

Our records show that you have not renewed your club membership at xxxxx Club for the current season. If you have forgotten to renew, please visit the [members area](#) to renew.

If you feel that you have renewed your membership and this record is incorrect, please contact your club immediately who can review this discrepancy. You can view your clubs [contact details here](#).

Your membership will be automatically archived by your State/Territory Centre on xxxxxx.

## Email to Club Officers

You are receiving this email as you hold the officer position of President, Lifesaving or Administration in SurfGuard. The following members in your club will be archived by xxxxxxx on the xxxxxxx as they have not renewed their membership for the current season.

The attached document provides you with a list of all members who received an email advising them of their membership being archived.

**NOTE:** the email was NOT sent to members who have a current pending membership renewal request or had marked 'Do Not Send Email' in their membership profile.

Once archived the member will not be covered by any insurance and will be removed from:-

- Internal Memberships
- Mailing Groups
- Patrol Teams
- Patrol substitution requests linked to archiving members in their specific teams
- Committees/Boards
- Officer Positions (here, it marks the archiving date as the 'To' date for the archiving member's officer position)

If you have any additional questions please contact your State centre [\[https://sls.com.au/club\\_directory\]](https://sls.com.au/club_directory)