



Surf Life Saving Australia – Circular

August 2008



SurfGuard – Introduction to the 08 / 09 Season

Document id	07/08-09	Audience	States, Branches and Clubs.
Department	Information Technology		This circular is not valid for QLD Surfmate users.
Summary			
This circular advises Clubs about the need to keep data accurate in Surfguard and the upcoming requirements that need to be communicated to all Surfguard users prior to the commencement of the 2008/09 season.			

The commencement of the 08/09 season sees the need for clubs to use Surfguard for not only their member management but also management of their organisation, awards and patrols. Important Surfguard data relating to your organisation is used regularly for communication throughout SLSA and for specific procedures and requirements as advised by your state. Analysis of statistics relating to members and patrols are used for reporting to the Government and to seek valuable funding.

If your organisation requires Surfguard training, please contact your state centre who can arrange an SLSA representative to conduct the training.

ORGANISATIONAL MANAGEMENT

1. Organisational Details

All details relating to your organisation are to be entered into the Organisation Details area within the "Organisational Management" menu item. Information added to this section is directly referenced and displayed on the Surf Life Saving Australia (SLSA) website. If your details are not entered, the contact information displayed on the SLSA website will be incorrect and thus other clubs or members will be unable to contact your organisation.

Important information to be entered into your Organisational Details are: *Physical Address*, *Postal Address* and *Contact* information including the *Display Name*, *Email* and *Phone* details under the General Details section although it is preferable that all details are entered.

2. Committees

Committees and Boards can be set up using the "Committees" link under the "Organisational Management" menu. It is important to keep up to date information relating to members who are involved in committees and their positions within each committee as this will enable your organisation to send mail-outs, newsletters or emails to required committee



members. You are able to add as many committees or boards as required and members can be easily added or removed.

By adding these details, Branches and States are able to send information directly to required committee members.

3. Service Profiles

Service profiles are in place to enable all organisations to list their hours of service during any given year or season. Service times can be broken up into date periods throughout the year or season. For each period, hours of service are entered for weekdays, Saturdays & Sunday / Public Holidays and further information can be entered such as contact details and descriptions of the organisations patrolling area.

Service profile information will be displayed on the SLSA website and it is therefore important for all organisations to fill in their relevant details.

Service profiles can be found under the "Organisational Management" menu item.

To add a new service profile, select "Add Patrol Profile" or to edit / delete, select the required option.

A description of the organisations Patrol Area can be entered by selecting the "Edit Details" link

Contact information relating to the organisations Service Profiles can be added using the "Add Contact" link or edited / deleted using the "Edit" or "Delete" links.

Date Period	Service Hours	Edit Delete
Monday - Friday:	00:00 - 00:00	
02 Feb - 24 Feb	Saturdays: 08:00 - 18:00 Sunday/Public Holidays: 08:00 - 18:00	
Date Period	Service Hours	Edit Delete
Monday - Friday:	00:00 - 00:00	
01 Mar - 27 Apr	Saturdays: 09:00 - 17:00 Sunday/Public Holidays: 09:00 - 17:00	
Date Period	Service Hours	Edit Delete
Monday - Friday:	00:00 - 00:00	
29 Sep - 25 Nov	Saturdays: 09:00 - 17:00 Sunday/Public Holidays: 09:00 - 17:00	
Date Period	Service Hours	Edit Delete
Monday - Friday:	00:00 - 00:00	
01 Dec - 16 Dec	Saturdays: 08:00 - 18:00 Sunday/Public Holidays: 08:00 - 18:00	
Date Period	Service Hours	Edit Delete
Monday - Friday:	00:00 - 00:00	
22 Dec - 27 Jan	Saturdays: 08:00 - 19:00 Sunday/Public Holidays: 08:00 - 19:00	

[Add Patrol Profile](#)

Patrol Area

Description: primary patrol: from sth landmark, Vine St to nth landmark, Austral Ave walkway. Secondary patrol: from sth landmark Austral Ave walkway to nth landmark, Balbaring Lagoon (roving)

Additional Patrol Periods (outside of listed times):

[Edit Details](#)

[Edit Details](#)

Contacts

Contact Name	Contact Details	Description	Edit Delete
Wendy Norman	office@avocabeachsls.asn.au	lifesaving	Edit Delete

[Add Contact](#)

[Add Contact](#)

4. Officers

For communication between organisations and to correctly determine who holds a specific position within your organisation, it is important that officer position details are completed in SurfGuard. As positions change regularly, this information must be kept as up to date as possible (usually after your Club's AGM). By adding these details, Branches and States are able to send information directly to required officers. The officers menu is located within the "Organisational Management" menu.

To assign a member to an officer position, select the "New" button next to the required position.

Pre-determined positions have been set up and are given a general name to reference the area they relate to eg "Lifesaving". It is important to allocate members to these positions for reporting purposes. If required, the name can be changed to better fit with your organisation instead of creating a new position eg Education may be changed to "Chief Instructor". To change the name of a pre-determined position, select the "Setup Officer Position Synonyms" button.

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

Position Name	Requirement Level	Officer	From	To	Officer Position Options	Officer Options
After Hours Emergency Contact	State, Branch, Club					New
Age Manager Coordinator	State, Club					New
Education	National, State, Branch, Club					New



5. Gear and Equipment

For all organisations to maintain a complete register of assets, the gear & equipment area is available to assist Clubs. To perform the annual gear and equipment check, standardised gear & equipment checklists have been developed at a national level which must be used by all organisations. These checklists can be printed straight from Surfguard and will be pre-filled with required details while using a national template for complying with SLSA standards.

The "Manage Gear & Equipment" sub-menu can be accessed via the "Organisational Management" main menu item.

To add a new piece of gear or equipment click the "Manage" button beside the relevant equipment type and proceed with adding a new item (image below). To edit or delete equipment from the register, use the required buttons as displayed in image below.

To print a pre-filled checklist for all items within an equipment type, select the "Print Checklist" button. When printing a checklist, all items within that equipment type will be displayed on the checklist.

First Aid Equipment - First Aid Supplies/Kits

First Aid Equipment - 1
First Aid Equipment - 2
First Aid Equipment - 3
First Aid Equipment - 4
First Aid Equipment - 5

Name: First Aid Equipment - 5
Current Gear Inspection Date: 18/09/2005
Date of Purchase:
Equipment Insured by:
Equipment Insured for: \$
Gear Inspection Completed by:
Gear Inspection Notes/Comments:
Item Description: Manikins
Last Service on:
Make/Model:
Manufacturer: Laerdal
Manufacturer Serial No.:
Notes:
Price on Purchase: \$
Purchased From:
Service Due:
Service notes:
Successfully Completed Gear Inspection: [x]

New New (with Copy) Edit Delete Cancel

Type	Total	Options	
Administration Equipment	0	Manage	
Beach Vehicle	1	Manage	Print Checklist
Buildings and Structures	0	Manage	
Club Equipment	0	Manage	
Competition Equipment	0	Manage	
Computer and Electrical	3	Manage	Print Checklist
Defibrillator	1	Manage	Print Checklist
First Aid Equipment	5	Manage	Print Checklist
IRB	5	Manage	Print Checklist
IRB Motors	9	Manage	Print Checklist
Manikins	0	Manage	
Oxy Viva	3	Manage	Print Checklist
Patrol Uniforms	0	Manage	
Radio	9	Manage	Print Checklist
Rescue Boards/Boogie Boards	14	Manage	Print Checklist
Rescue Tube	9	Manage	Print Checklist
RWC	0	Manage	
Shark Bag/Major Haemorrhage Kit	0	Manage	
Spinal Equipment	0	Manage	
Trailer	2	Manage	Print Checklist

ASSESSMENTS / AWARDS

Before assessments are run for the new season, archive any old assessments that may still be in your assessment request list. Your assessment request list can be accessed via the "Assessments" menu item. To find out if there are any incomplete or old assessments from the previous season, change the "assessment date – from" and "assessment date – to" fields, so the date range will cover the required time period.

When creating a new "Award" assessment during the upcoming season, it should be entered and saved into the system at the start of training for the award. It will appear as status "Incomplete" however do not submit the assessment until all potential changes have been made and the all required members are added. Only while in the "Incomplete" stage can an assessment be edited.

If adding a "Proficiency" type assessment, it should be entered, saved and submitted into Surfguard as soon as the proficiency test has been completed. No approval is needed for the results to be entered, so these can be entered straight away.

For both "Award" and "Proficiency" assessments, the results must still be approved by your Branch or State before the assessment is complete.



To ensure that eligible members are added to assessment requests, Surfguard will check pre-requisites before allowing members to be added to an assessment. If a member does not appear in your candidate list, they most likely do not hold the pre-requisites for the award. It is important to note that some awards require a member to have, or be proficient in another award before they can be assessed. An example of this is the "Silver Medallion IRB Drivers" in which a member must be proficient in their "IRB Crew Certificate" before they can become a candidate for a "Silver Medallion IRB Drivers" assessment.

Below are descriptions of two ways to check pre-requisite information for an award:

New Assessment

When creating a new assessment request, click the "Award Reference Report" button underneath the add candidates box. It will take you to the report screen below.

Award Reference Report

This will take you to the General Reports screen

Reports

Select "Reports" from the "Reports" main menu and use the "Reference: Awards" report type.

The screenshot shows the Surfguard web application interface. At the top, there is a navigation menu with items: Transfers, Organisational Management, Patrols, Mailing Groups, Messages, Maintenance, and Reports. The 'Reports' menu is expanded, showing options: Reports, Custom Reports, and Gear & Equipment Custom Reports. Below the navigation is the page title 'Member Details Reporting @ Avoca Beach'. The main form area contains the following fields:

- Report Type:** Reference: Awards (dropdown), Custom Report (button)
- Output Format:** One Big Page Report (HTML format) (dropdown)
- Enter the following fields to narrow your search:**
- Award Status:** All (dropdown), Active, Active Proficiency, Archived (dropdown)
- Award Type:** All (dropdown)
- Awards:** Basic Emergency Care, Basic Life Support Certificate, Basic Resuscitation Certificate, Branch Life Member, Branch Lifesaver of the Year, Branch Volunteer of the Year, Bronze Medallion (selected), Build Client Relationships, Cert IV in Assessment and Workplace Training (BSZ), Cert IV in Training and Assessment
- Sort Type:** Sorted Alphabetically (selected), Sorted by Award Type
- Buttons:** Display Report, Clear

MEMBERS

When registering members for the new season, if some will not be renewing or some members are still registered for older seasons, you should archive these members. To bulk archive a number of members, you can use the "Bulk Processing" link under the "Members" menu item. To archive a single member, change their status to "Archive" from within their member details -> Organisation Membership Details section.

1. Member Details

A number of important details pertaining to members is often left un-entered or is incorrect, which prevents organisations from producing valuable reports while also reducing the overall quality of data within Surfguard. Aside from mandatory



fields such as First name, Date of Birth etc, a member should always have the following details entered / checked if applicable to the member: **Mobile Phone, Email, Child Protection Form, Driver's License** and **Registered Season**. As much as possible of the "Enrolment/Background Details" section should also be filled out, with the first 4 criteria relating to cultural background being the most important.

Information such as Drivers License and Marine Licence are often used as prerequisites for awards, so these are important details to add to a members record.

2. Transactions

To keep track of all payments made by members to your organisation, the transactions area should be used to record these details. The transaction types cover all kinds of payments ranging from Donations through to Membership Fee's. Full reporting functions can be run on member's transactions providing a helpful breakdown of all payments for your members. The transaction screen can be found as a link next to each person when searching/listing your members, or in the "Member Links" section within a persons details.

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		View Edit Transaction
4263832	Border	Allan	15/10/1965	Test NSW Club	2007 - 2008	Active	Active (18yrs and over)		View Edit Transaction Patrols

Member Links

The member has no award.

[Start Transaction](#)

[Mailing Groups](#)

PATROLS

There are five main steps in the patrol process and if teams and patrol rosters are managed well and set up early, this can make entering of patrol hours very easy throughout the season.

1. Teams / Positions

Before the patrol season has started, add all your teams into SurfGuard. Teams can be managed by accessing the "Manage Patrol Teams" link under the "Patrols" menu item. Once you have added all your teams, assign patrolling members to each team, putting members in the correct position within the team, i.e. First Aid Officer etc. SurfGuard will check each member's awards to ensure they hold the correct qualifications to be in a certain position.

Team Name	Actions
Reserve Team	Edit Delete Members Roster
Team A	Edit Delete Members Roster
Team B	Edit Delete Members Roster

[Add a Patrol Team](#)

To assign members to positions within a team, select the "Members" link next to the required team.

2. Rosters

Once a team has been set up, add the team's roster for the entire season by selecting the "Roster" link next to the required team. Each patrol day for a team will consist of a date, start time and finish time.

If your organisation patrols using "Unrostered" teams, which do not have a set roster or set members, you do not need to add these teams in the "Manage Patrol Teams" area. These teams can be added to an "Unrostered" patrol while filling out your organisations Attendances / Patrol Logs.



3. Attendances / Patrol Logs

Patrol attendances are all recorded in the "Patrol Logs" area of Surfguard within the "Patrols" main menu. By selecting a date range, all teams that have a set roster date during the date range will be displayed.

Patrol Dates From: 27/07/2008 To: 27/11/2008
Log Status: All Patrol Name Contains:
Retrieve Patrol Logs

Add Unrostered Patrol Print Empty Patrol Log

Organisation	Date	Patrol Name	Start Time	Finish Time	Status	Days Open	Actions
Test NSW Club	Sat 25/10/2008	Team B	11:00	14:00	Not Created	-	Create Log Print Log
Test NSW Club	Sat 18/10/2008	Team A	09:00	13:00	Not Created	-	Create Log Print Log
Test NSW Club	Sat 11/10/2008	Team B	09:00	16:00	Not Created	-	Create Log Print Log
Test NSW Club	Sat 04/10/2008	Team A	11:00	14:00	Not Created	-	Create Log Print Log

Total: 4 patrol log(s).

Attendances can be recorded for each rostered date by selecting the "Create Log" button next to the required team/day. The log will be pre-filled with all team members while patrolling times and members can be changed if needed.

To add an Unrostered patrol, select the "Add Unrostered Patrol" button.

4. Patrol Activity / Stats

Once a patrol log has been created, the "Activity / Stats" screen will appear in order to record relevant statistical information relating to the log. Activity information relating to the patrols rescues, weather, crowd numbers on the beach etc are vital for your organisations end of season statistics. Detailed reporting options are available for patrol stats using the "Reports" menu item, and they provide valuable information to your state centre and to SLSA.

5. Incident Reports

If incidents occur on the beach and an incident report sheet is completed, this should be entered into the Incident Report Database (IRD) as soon as possible. If you or your organisation does not have access to the IRD, then please contact SLSA using the information below.

SURFGUARD LOGIN ACCOUNTS

To ensure that only required users are accessing the system, it is important to maintain a list of all active surfguard users. If someone no longer requires access or a new login is required, a Form 49 must be filled out and can be found on the SLSA website under "Admin & Resources" -> "SLSA forms" -> "Information Technology". For gaining access to a list of all users in your organisation, please contact the Surfguard helpdesk.

SUPPORT / ASSISTANCE

If you need assistance with entering this information in Surfguard, please consult the Surfguard User Guide which can be found on the SLSA website under Admin & Resources/ Information Technology
http://www.slsa.com.au/site/_content/resource/00001235-docsource.pdf or email Surfguardhelp@slsa.asn.au or call the Helpdesk on 1300 724 006.

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