



SLSA Patrol Swap – Surfguard Administrators Guide v1

Patrol Substitution/Swap Management in Surfguard

The patrol swap/sub function is now available to all members via Lifesaving Online in Members Portal. It enables members to invite other members to sub for them if they are unable to do a patrol and also enables members to confirm they can do a sub for another member.

See **SLSA Lifesaving Online in the Portal v2.0** for more information relating to the patrol swap function for members in Lifesaving Online. This guide can be downloaded from the Portal Library.

A club officer/administrator will also be able to view information relating to Patrol Substitutes in three sections of Surfguard

1. Maintenance > Substitution Maintenance
2. Patrols > Manage Patrol Teams > Substitute Management
3. Patrols > Patrol Logs

Substitution Maintenance

Access: Maintenance > Substitution Maintenance

The substitution maintenance enables club officers/administrators to change the default settings for the substitution parameters. When making changes to any of the parameters clubs officers/administrators should refer to the clubs Constitution & By-Laws relating to Patrols. Things to consider may include:-

- Timeframes for cancelling / accepting subs
- Who is penalized if a sub “No Shows” for a patrol
- 100% patrol attendance policy
- Clubs right to cancel a substitution made

The screenshot below displays the default settings in Surfguard.

Substitution Maintenance @ Test NSW Club			
Substitution Parameter	Description	Value	Options
Future patrols - Hours prior	Defines the period prior to the patrol starting where a substitute request can no longer be created.	48	Edit
Deselect Substitution - Hours Prior	Defines the period prior to the patrol starting where a confirmed substitute can no longer cancel the patrol substituton.	48	Edit
Patrol Not Taken - Hours Prior	Defines the period prior to the patrol starting whereby all unaccepted substitution requests will be cancelled and an email sent to notify the member who created the request.	48	Edit
Patrol Not Taken - Notification	Enable or Disable the email notification that is sent when a substitution request has not been accepted by anyone.	Yes	Edit
Patrol Taken - Notification	Enable or Disable the email notification that is sent when a substitution request is confirmed.	Yes	Edit
Patrol Taken - Positions Notified	Defines the Positions on the patrol team that will be notified when a substitution request is confirmed.	Patrol Captain	Edit
Upcoming Patrol - Hours Prior	Defines the period prior to the patrol starting where nominated positions are emailed a list of Patrol Members for the upcoming patrol.	24	Edit
Upcoming Patrol - Positions Notified	Defines the Positions on the patrol team that will be emailed a list of Patrol Members for the upcoming patrol.	Patrol Captain	Edit
Upcoming Patrols - Email/SMS - Days	Defines the number of days prior to the patrol starting where the rostered patrol will appear in the 'Filter by Patrol Team Fields' area within 'Email/SMS members'.	7	Edit
Eligible Members Only	Defines whether club administrators are able to select from eligible members only while using Surfguard to manage substitutions.	No	Edit

Substitute Management

Access: Patrols > Manage Patrol Teams > Substitute Management

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

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

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:

Patrol Position:

Patrols to Display:

First Name:

Last Name:

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

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

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

Substituted – Remove the substitute or Change the substitute.

Requesting Substitute – Add a substitute or Cancel the Substitution Request

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:

Patrol Position:

Patrols to Display:

First Name:

Last Name:

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

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

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

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:
 Patrol Position:
 Patrols to Display:

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

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

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:
 Patrol Position:
 Patrols to Display:

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

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

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

Home | Go

Retrieve Patrol Members:

Member ID:
 First Name:
 Last Name:
 Date of Birth: From: To: (dd/mm/yyyy)

Eligible Members only

If the club officer/administrator selects the **“Need a Substitute”** option the screen will update as follows:-

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:
 Patrol Position:
 Patrols to Display:

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

Date	Time	Club	Patrol Team	Position	Status	Person Requiring sub	Person/Substitute	Action
29/6/2015	09:00 - 18:00 (09:00 hrs)	Test NSW Club	Team-Test	First Aid Officer	Requesting Substitute	Yvette Test	Add Substitute	Cancel Substitution Request

View Substitutions in Patrol Logs

Access: Patrols > Patrol Logs

Once a sub has been confirmed by a member or a club officer/administrator the Patrol Log will automatically update with the subs name.

Screenshot below shows Gary Daly is confirmed as a substitute for Yvette Test

Substitute Management @ Test NSW Club

Retrieve Patrol Members:

Patrol Team:
 Patrol Position:
 Patrols to Display:

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

Date	Time	Club	Patrol Team	Position	Status	Person Requiring sub	Person/Substitute	Action
30/6/2015	09:00 - 18:00 (09:00 hrs)	Test NSW Club	Team-Test	First Aid Officer	Substituted	Yvette Test	Gary Daly	Change Substitute

Patrol Log display is automatically updated with the substitutes details:-

Patrol Log @ Test NSW Club

Patrol Log Details:

Patrol Name: Patrol Type: Total Patrol Positions:
 Date: Patrol Start Time: Patrol Finish Time:
 Patrol Beach:

Retrieve Available Members:

Include Non-Financial Members:

No.	Position	Remove Member	Add Member	Add Visiting Member	Member	Patrol Type	Remove Sub.	Add Sub. Member	Add Sub. Visitor	Substitute	Start Time	Finish Time	Total Time
1	PC	<	Mbr >	Vis >	Rutherford, Yvette	Rostered	<	Mbr >	Vis >		09:00	18:00	09:00
2	VC	<	Mbr >	Vis >	Cocks, Rebecca	Rostered	<	Mbr >	Vis >		09:00	18:00	09:00
3	IRBD	<	Mbr >	Vis >	Hutchinson, Andrew	Rostered	<	Mbr >	Vis >		09:00	18:00	09:00
4	IRBC	<	Mbr >	Vis >			<	Mbr >	Vis >		00:00	00:00	00:00
5	ART	<	Mbr >	Vis >	McTaggart, Michael	Rostered	<	Mbr >	Vis >		09:00	18:00	09:00
6	FAO	<	Mbr >	Vis >	Test, Yvette	Substitute	<	Mbr >	Vis >	Gary Daly	09:00	18:00	09:00
7	AM	<	Mbr >	Vis >			<	Mbr >	Vis >		00:00	00:00	00:00
8	M	<	Mbr >	Vis >			<	Mbr >	Vis >		00:00	00:00	00:00