



Surf Life Saving Australia - Circular

Title:	IT Enhancements June 2015
Document ID:	Circular 112/2014-2015
Audience:	State Officers and Staff, Branch Officers and Staff, Club Officers and Staff, Chief Training Officers / Directors of Education, Registrars / Administrators / Secretaries
From:	SLS Information Technology Team
Date:	17 th June 2015
Subject:	IT System Enhancements
Summary:	<p>The following Circular contains information relating to the following systems, websites and applications:</p> <ul style="list-style-type: none">• Surfguard• New Online Club Store• New Patrol Swaps• Members Portal• Payment Gateway• Patrol Ops App, SLSA iOS & Android Apps• Support Ticketing System• Coming Soon

SURFGUARD

New 2015 Season and snapshot

At midnight on 30 June, Surfguard will automatically take a snapshot of membership, award and patrol statistics for the 2014-2015 season, and automatically rollover the current season settings to 2015 (2015-2016).

Clubs and Branches / Regions should endeavor to have performed the following actions by that date:

- Membership cleaned up by archiving all non members who did not fulfil obligations in 2014-2015.
- All assessments that are completed should be archived
- All patrol logs and changes should be finalized
- All pending requests relating to the old season 2014-2015 should be actioned

Do not archive all your members as this affects the retention statistics.

Reports

An issue with the Total Member Patrol Hours Report has been fixed. A members Lifesaving Patrol hours career summary now correlates with the output of the Total Members Patrol Hours report total patrol hours when the 'for all organisations' checkbox is selected.

Surfguard Award Changes

- Added unit of competency AVIF2015A – Utilise emergency breathing system to the unit of competency and AQTF module – all UofCs
- UOC Perform CPR HLTCPR211A has been removed as an elective from the Cert II Public Safety. This UOC is no longer current and has been superseded by HLTAID001.



- The following awards have been 'archived' and can no longer be raised in an assessment request.
 - Advanced Resuscitation Certificate Refresher
 - Course in Emergency Asthma Management (21886VIC)
 - Course in the Emergency Management of Asthma in the Workplace (22024VIC)
 - Manage First Aid in the Workplace (HLTFA403C)
- The following awards, which have a status of active proficiency, can only be allocated against a proficiency.
 - Advanced Resuscitation Certificate
 - Apply Advanced First Aid Refresher
 - Apply First Aid (HLTFA301B)
 - Assessor Advanced Resuscitation Techniques
 - Assessor Apply First Aid

'NEW' ONLINE CLUB STORE & Portal Intergration

In order to improve the security of the Club Store and to increase its usability, we are making changings to the way it is accessed. This week the SLSA Surf Store located at <http://www.sls.com.au/store> is transitioning from a web-based credential system into the Members Portal. From 18/06/15, all access to the store for both club members and club officers will be facilitated via the Members Portal. Therefore if you do not have an activated Members Portal Account, you will not be able to purchase anything from the store. All existing accounts on the current store will be disabled on 18/06/15 as per a notification email sent on 15/06/15.

From the cut-over date on 18/06 access to the store will be via a new tab within the Portal titled 'Member Store'. Click on this tab to view the Store launch page. If you are a club member only then you will see just one button on this page – click on it to view the store's range of member-facing goods. If you are a club officer and have been assigned to one of the two Store Administrators positions in Surfguard, then you will see two buttons – one for Club Members and one for Club Officers – click on this second Club Officers button to view the store's range of club-facing goods.

The screenshot shows the 'Member Store' page within a web portal. The navigation bar includes 'Home', 'My Forms', 'Library', 'Forum', and 'Lifesaving Online'. Below this, a secondary bar contains 'Home', 'My Drafts', 'Search Centre', 'My Details', 'Change Password', 'Other SLSA Websites', and 'Member Store'. The main content area is titled 'Member Store' and contains three sections:

- As an active SLS member please use the below button to access the Members Online Shop:** A blue button labeled 'Click here to access the members online shop'. A red arrow points to it with the text 'Everyone will see this button'.
- As an online shop officer for Bondi please use the below button to access the Online Shop:** A blue button labeled 'Click here to access the online shop for Bondi'. A red arrow points to it with the text 'Only Online Member Store Administrators will see this button.'
- As an online shop officer for Bronte please use the below button to access the Online Shop:** A blue button labeled 'Click here to access the online shop for Bron...'. A red arrow points to it with the text 'Online Member Store Administrators at more than one club will see multiple buttons'.



Payment for goods falls into two categories:

- **Club Member**- all goods will need to be paid for at the time of purchase by credit card using our Westpac PayWay credit card fulfilment facility. You will receive an email receipt.
- **Online Member Store Administrator** – you will be invoiced by SLSA in the traditional way using any points your club has accrued.

Officers who Manage the Club store ordering

There have been some instances where non-authorised people have been ordering from the online Club store and charging to the clubs account. So that the authorised Officer is known to SLSA, we have created two positions in the Officers area for clubs/organisations to define the shop manager, who is an authorised person to order on behalf of a club.

The two positions are “**Online Member Store Administrator 1**” and “**Online Member Store Administrator 2**” as can be seen below:

OR&S	State, Branch, Club				New
OHS Assessor	Club	Edit	Delete		New
Official Co-ordinator	State, Branch, Club				New
Online Member Store Administrator 1	National, State, Branch, Club Daly, Gary	01/02/2015	31/05/2016		New Edit Delete
Online Member Store Administrator 2	National, State, Branch, Club Klerck, Travis	01/02/2015	31/05/2016		New Edit Delete
Paid Administration	National, State, Branch, Club				New

If you have not yet assigned a club officer to the position of *Online Member Store Administrator* then please do so at your earliest opportunity, bearing in mind that it takes 24 hours for any changes in Surfguard to be reflected in the Portal. To assign an officer to this role, log into Surfguard and click *Organisational Management > Officers > Officers*.

In the future these positions will be used to automatically check and allow a person who is nominated in the Officers position to order on behalf of the club.

We ask the relevant club officer to go into *Organisation Details > Officers* and select one or two people who are authorised to order on behalf of the club.

NEW FEATURE - PATROL SWAPS – available from next week.

Patrol substitutions (Subs or swaps) enables members to indicate when they will be unable to attend a patrol therefore inviting other club members to sub/swap for them. Club members can also accept to sub for another member who is unable to patrol. Members can now manage their patrol swaps using the online application **Members Portal** > Lifesaving Online > Patrols whilst club Officers can oversee and also manage the process via **Surfguard**.

We have placed in the Members Portal Library under *Administration and IT > IT > SLSA > Guides* a document which provides assistance to club officers and members in understanding the Patrol Swaps process however over page we have detailed the fundamentals.



Requesting a substitute

When viewing your Patrol Roster from within the Members Portal > Lifesaving Online, there are now options displayed allowing members to put their patrol up for substitution. This creates a request in the system which is shown in the 'Substitutions' screen and is available for other patrol members to accept.

Patrol Roster | Patrol Hours | Substitutions

DISPLAY OPTIONS

Patrol Season: 2014/2015

Group By: Date Organisation Patrol Team

Update

CALENDAR VIEW

June 2015

Mon	Tue	Wed	Thur	Fri	Sat	Sun
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Below are details of your upcoming and/or past patrol roster for the selected season.

VENUS BAY

Patrol Team: Patrol 1

Position: Member

Date	Time	Status	Actions
Sat 04/04/2015	10:00 - 16:00 (6 hrs)	Rostered	
Sun 21/06/2015	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute
Mon 22/06/2015	09:00 - 13:00 (4 hrs)	Requesting Substitute	
Tue 23/06/2015	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute
Wed 24/06/2015	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute
Thu 25/06/2015	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute
Fri 26/06/2015	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute
Sat 27/06/2015	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute
Sun 28/06/2015	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute
Mon 29/06/2015	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute
Tue 30/06/2015	09:00 - 13:00 (4 hrs)	Rostered	I need a substitute

Season Total: 11 patrol(s).

Substitutions

This screen shows all patrol substitutions that the member has accepted and also a list of all substitutions in the members club(s). The screen details the date and time of the patrol and the patrol team position. Options are available allowing the members to 'take' a patrol and confirm that they will substitute for the member. As long as it's done within the required time, a member can also 'remove' themselves from a patrol that they can no longer substitute for, see below:

Patrol Roster | Patrol Hours | Substitutions

DISPLAY OPTIONS

Patrol Season: 2014/2015

Group By: Date Organisation Patrol Team

Update

Below are details of your upcoming patrols for which you've requested for substitution

VENUS BAY

Patrol Team: Patrol 1

Position: Member

Date	Time	Club	Team	Status	Person/sub	Agreed	Contact	Actions
Mon 22/06/2015	09:00 - 13:00 (4 hrs)			Requesting Substitute				Remove

Season Total: 1 patrol(s).



Surfguard Substitute Management

Where a patrol member has listed a substitute request through the Members Portal, the club administrator may either cancel the request, add a substitute manually or remove a confirmed substitute through the “Substitute Management” page within the Patrols main menu, see below:

The screenshot shows the Surfguard web application interface. At the top, there is a navigation bar with the following items: Summary, Members, Assessments, Transfers, Organisational Management, **Patrols**, Mailing Groups, Messages, Maintenance, and Reports. The 'Patrols' menu is expanded, showing options: Manage Patrol Teams, Patrol Logs, Unpatrolled Stats, Surfcom, Past Patrol Hours, and Patrolling Membership Categories. The 'Substitute Management' option is highlighted in a sub-menu.

Below the navigation bar, there is a section titled 'Retrieve Patrol Members:' with filters for Patrol Team (All), Patrol Position (All), and Patrols to Display (Substitution Requested). There are also input fields for First Name, Last Name, and Date Range (From: 16/06/2015, To: 16/07/2015).

Date	Time	Club	Patrol Team	Position	Status	Person Requiring sub	Person/Substitute	Action
22/6/2015	09:00 - 13:00 (04:00 hrs)	Venus Bay	Patrol 1	Member	Substituted	Andrew Walker	John Lancaster	Change Substitute <input type="button" value="↻"/> Remove Substitute <input type="button" value="✖"/>
24/6/2015	09:00 - 13:00 (04:00 hrs)	Venus Bay	Patrol 1	Member	Requesting Substitute	Andrew Walker		Add Substitute <input type="button" value="+"/> Cancel Substitution Request <input type="button" value="✖"/>
26/6/2015	09:00 - 13:00 (04:00 hrs)	Venus Bay	Patrol 1	Member	Requesting Substitute	Andrew Walker		Add Substitute <input type="button" value="+"/> Cancel Substitution Request <input type="button" value="✖"/>

Substitute Maintenance

Club administrators can change the default settings for all Patrol Swap functions by using the ‘Substitute Maintenance’ page under the ‘Maintenance’ menu. A basic description is provided for each setting, see below:

The screenshot shows the 'Substitution Maintenance @ Venus Bay' page. The navigation bar includes: Transfers, Organisational Management, Patrols, Mailing Groups, Messages, **Maintenance**, and Reports. The 'Maintenance' menu is expanded, showing options: Background Reports/Messages, Email Notification Settings, Enrolment Source Companies, Transactions Maintenance, **Substitution Maintenance**, and Templates.

Substitution Parameter	Description	Value	Action
Future patrols - Hours prior	Defines the period prior to the patrol starting where a substitute request can no longer be created.	24	<input type="button" value="Edit"/>
Deselect Substitution - Hours Prior	Defines the period prior to the patrol starting where a confirmed substitute can no longer cancel the patrol substitution.	48	<input type="button" value="Edit"/>
Patrol Not Taken - Hours Prior	Defines the period prior to the patrol starting whereby all unaccepted substitution requests will be cancelled and an email sent to notify the member who created the request.	20	<input type="button" value="Edit"/>
Patrol Not Taken - Notification	Enable or Disable the email notification that is sent when a substitution request has not been accepted by anyone.	Yes	<input type="button" value="Edit"/>
Patrol Taken - Notification	Enable or Disable the email notification that is sent when a substitution request is confirmed.	Yes	<input type="button" value="Edit"/>
Patrol Taken - Positions Notified	Defines the Positions on the patrol team that will be notified when a substitution request is confirmed.	Patrol Captain	<input type="button" value="Edit"/>
Upcoming Patrol - Hours Prior	Defines the period prior to the patrol starting where nominated positions will appear in the 'Filter by Patrol Team Fields' area within 'Email/SMS members'.	32	<input type="button" value="Edit"/>
Upcoming Patrol - Positions Notified	Defines the Positions on the patrol team that will be notified when a substitution request is confirmed.	Patrol Captain Vice Captain	<input type="button" value="Edit"/>
Upcoming 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'.	2	<input type="button" value="Edit"/>
Eligible Members Only	Defines whether club administrators are able to select from eligible members only while using Surfguard to manage substitutions.	Yes	<input type="button" value="Edit"/>



SLSA MEMBERS PORTAL

A number of enhancements have been released as listed below:

Save and Submit content items in one step

We have introduced the ability to 'Save and Submit' new articles, announcements, jobs and events without needing to first create a draft. This allows users to create content that's immediately available for approval. To do this, select the 'Save and Submit' option as can be seen below. Use the 'Save Draft' option if you wish to edit your content item again prior to submitting for approval.

*Publish Date
The Publish Date will default to the current time if left blank.
27/05/2015 2:06:26 PM Clear

Expiry Date

*Expiry Date
The Expiry Date below is the current date plus 3 months however can be changed if required.
27/08/2015 2:06:26 PM Clear

*Required Fields.
Save Draft Save and close **Save and Submit** Close

Portal Administrative User Groups

When viewing your details through 'My Details' or viewing club members in 'Person Management', it is now possible to see which user groups they are a member of. The user groups are displayed in the bottom right of the screen within the "Portal Administration Functions" area, as can be seen below:

Home My Tasks My Forms Library Comms Management User Administration Merge Tool Content Administration Person Management Forum Lifesaving Online

Person Details

SLS id: 14909238
Title: Master
First Name: Andre
Last Name: Kler
Date of Birth: 28/09/1981

Member of: Test NSW Club
Joined Date: 01/09/2011
Registration Date: 21/11/2014
Expiry Date: 30/06/2015
Status: Active
Membership Category: Junior Activity Member (5-13 years)
Registered Season: 2014
Competition Rights: Yes

Member of: Test QLD Club
Joined Date: 03/03/2014
Registration Date: 03/03/2014
Expiry Date: 30/06/2014
Status: Active
Membership Category: Active (18yrs and over)
Registered Season: 2013
Competition Rights: No

Address (HOME): 57 Sparks St
Mascot
NSW 2020
Australia

Address (POSTAL): 57 Sparks St
Mascot
NSW 2020
Australia

Portal Administration Functions
South Coast Branch (Qld)
Content Approver: Y
Form Approver: N

Portal User Groups
Communication Management



Additional Members Portal fixes and notifications:

- 'Active' status for members is selected by default when using the Communication area
- A bug that caused incorrect time when adding news and announcements has been resolved.
- SLSLSA Circular 102 2014-2015 has been sent to club officers to encourage account creation by them and members prior to renewals being sent out.
- An email was sent in late May to all members who had an active Life Saving Online accounts to encourage them to create a Portal Account.

Hints and Tips for the Member Portal

You might consider the following activities in the portal:

- **EVENTS** – if you are organising an event such as a Surf Carnival, Ocean Swim or even an Education event, consider creating an event for the home screen. Clubs can create events visible only to their own members as well. Submit the event item to the level you want it seen at.
- **Members Details** – you could encourage your members to create a Portal account so they can update their address information so it conforms to the new requirements. This can be done by clicking the Lifesaving Online tab within the Portal. Whilst they are in the Portal, via Lifesaving Online, they can also see their Patrol roster, Patrol hours and Awards
- **Newsletters** – you could post up your own Club / Branch / State newsletter in the **NEWS** area to increase the reach of your information. Only members relevant to that level of the organisation will see the information.

Actions for Club Officers who have 'Approver' administration functions

- Check your My Tasks area of the portal for both Forms that may have been submitted by members and also noticeboard items that need content approval.
- Library – consider using the library for your Clubs internal procedures and forms
- Portal Accounts – start encouraging your members to create a Portal Account

SLSA Payment Gateway

As the new season approaches and clubs set their 2015/2016 fees we remind clubs to update their price lists contained within the Payment Gateway. To do this clubs need to log into their club specific Westpac payment gateway account (URL: ilink.westpac.com.au) and upload their plain text document. If your club has forgotten or misplaced your log in details please email the IT department (ithelp@slsa.asn.au) or lodged a support ticket to <https://support.sls.com.au> and ask for a password reset. Item 4.4 within the Payment Gateway User Guide details how to create and upload a price list. IT System user guides are located within the portal library under *Administration and IT > IT > SLSA > Guides*

Water Safety Policy Risk App for Android

A new release of the Water Safety Policy risk assessment app V1.2 has been sent to all users. Please ensure your version is up to date by browsing to rink.hockeyapp.net on your mobile device and installing the latest builds.

Beachsafe App Updated to 64-bit

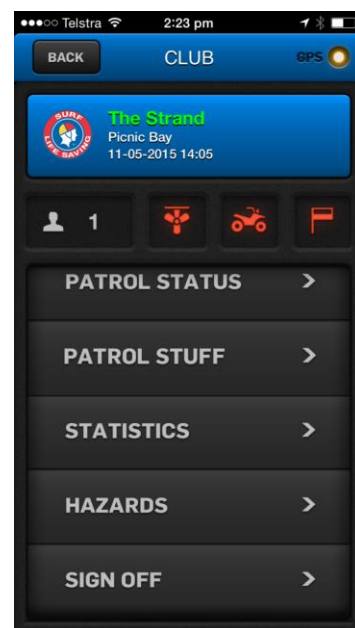
In order to further enhance the speed of the Beachsafe app, it has now been completely rebuilt and is fully 64-bit compliant in order to comply with Apple store licensing. The refresh of the App means that Beachsafe is now even faster than before and can provide beach safety information for visitors to the coast without delays. The release also coincided with an enhanced feed from the Bureau of Meteorology, meaning forecast accuracy has greatly improved.



Patrol Ops IOS and Android Application V2.4

A new version of the Patrol Ops app has been released for patrolling members. The User Guides have also been updated to reflect the enhanced functionality.

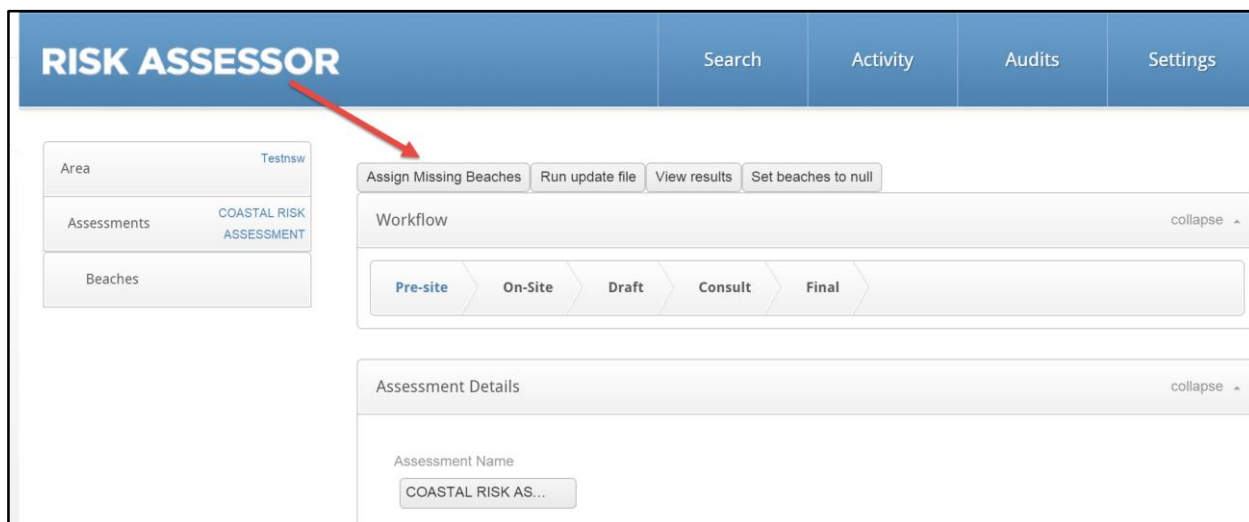
Enhancements include Integration into the Patrol Status area of the Patrol Stuff and Hazards functions and multiple sign-ons for a single service where they patrol more than one beach. The movement of the Patrol Stuff and Hazards into Patrol Status make for a more logical and comprehensive sign-on/sign-off process. Patrol members can log the position of all patrol equipment using the smartphone GPS functionality, without having to switch to the Tracker. In addition, Surfcom was recently updated to include support for multiple beaches per service and these have been carried through to the app, allowing for different statuses and hazards for multiple beaches within the same service.



iRisk

There have been two new enhancement to the iRisk, released into production 20 May 2015.

1. Ability for State Administrators to delete beaches from an Assessment.
2. Null data fields have been made active to enable assessors to assign to the correct locations after and assessment has been completed



IT Department “New” Support Ticketing System

To streamline support requests for SLSA's IT systems and better serve you, we have developed a support ticket system. If you encounter a problem with any of the SLSA IT Systems or need assistance performing a function within one of the systems ie: surfguard, then go to <https://support.sls.com.au> to log a ticket or find an answer to commonly asked questions relating to Surfguard, Members Portal, Surfcom etc in the Frequently Asked Questions (FAQ's) section that can be accessed from the Home Page.

Patrol Hours Reports – Use the following link to access the FAQ's section of our new Support Ticketing System to find information on how to run reports to check members patrol hours for the season

<https://support.sls.com.au/kb/faq.php?cid=3>



IT Systems User Account Application Form (Form 49)

The Form 49 has been updated with the latest Administrative Function options in the Members Portal. The form can be downloaded from the Surfguard login page and the Members Portal library. Please be advised that applicants are not able to authorise their own Form 49.

Coming Soon

SLSA is always trying to improve our systems and listed below are a number of new screens or functions we will be working on in the near future. We will provide more information on these enhancements as they come closer to being released:

- **Family Groups** – Ability for parents and guardians to create ‘Family Groups’ within the Portal. Once a family group is setup then the parent(s) or guardian(s) can manage all the members in their family group including renewals and updating of details. See screenshot below showing a family group in the Portal and the options available to the Parent/Guardian for updating group members:

The screenshot shows a web interface titled 'Update my details | My Family'. Below the title is a section 'Share data with Family Groups' with the following information: 'Family Group: Klerck' and 'Family Group Organisation: Macmasters'. A table lists three family members with columns for First Name, Last Name, DOB, Membership Status, Membership Category, Season, and four update checkboxes: 'Update Address Fields?', 'Update Phone?', 'Update Email?', and 'Update Emergency Details with your profile values?'. The table data is as follows:

First Name	Last Name	DOB	Membership Status	Membership Category	Season	Update Address Fields?	Update Phone?	Update Email?	Update Emergency Details with your profile values?
Jenna	Klerck	15/05/1984	Active	Active (18 years)	2014-2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abc	Klerck	27/03/1997	Active	Probationary	2015-2016	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Xyz	Klerck	01/02/2000	Active	Probationary	2014-2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **Payment Gateway** – The Payment gateway will getting an overhaul before next season, this includes a new responsive and clean design, the ability for email notifications to go to multiple club administrators and for end of day reconciliation files to be emailed to the club financial controller.

A GUIDE TO SYSTEM TERMINOLOGY

Lifesaving Online – this is the members self service area where members can go to renew membership, change contact details and view their own details. Lifesaving Online can now be accessed directly from within the Members Portal, please go to <https://portal.sls.com.au>

Surfguard - this system is used by Club Officers / Administrators to manage members, awards and patrols. It is NOT used by members. Go to www.surfguard.slsa.asn.au

Portal or Members Portal – this is a new system that now encompasses lifesaving online. Members and officers use this system to view organisation news, files, communications and other features. A member of a club can create a Portal account themselves by going to <https://portal.sls.com.au>

E-Learning – this system is accessed through Lifesaving Online (via the Members Portal) by clicking on the Courses tab.

Payment Gateway – members of clubs are encouraged to make a payment to their club through Lifesaving Online rather than just going directly to the payment gateway. Club officers use ilink to manage payment gateway transactions & price lists



NOTE: Clubs should always be the first port of call for members who are having difficulty renewing / joining their club and for the updating of member / personal information. Making your Club's contact details easy to find will assist members / new members through the joining process.

HELP AND SUPPORT

SLSA have a dedicated helpdesk team available for any assistance, queries or help that may be required. Users of all SLSA IT systems can contact the helpdesk using the below information.

Support Hours

Monday to Friday:	8.00am – 6.00pm
Saturday & Sunday:	9:00 am – 1:00 pm
Log a support ticket:	https://support.sls.com.au
Telephone:	1300 724 006
Email:	ithelp@slsa.asn.au