



Surf Life Saving Australia - Circular

Title:	IT Start of Season Procedures and upcoming IT System Enhancements
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Audience:	SLS State/Territory Centres, SLS Branches/Districts, SLS Clubs and Services
From:	Surf Life Saving Australia – IT Department
Date:	1 st July 2015
Subject:	Surfguard Start of Season procedures, checklist and 2015 IT Enhancement information
Summary:	IT Systems Start of Season Procedures – July 2015

START OF SEASON ACTIVITIES 2015/2016

The 1st July 2015 sees the commencement of the 2015/16 season (2015 in Surfguard) for most organisations within Surf Life Saving. This Circular is designed to assist club officers/administrators perform all the tasks required for start of season. Systems covered include Surfguard, Members Portal/Lifesaving Online and the Payment Gateway.

It is highly recommended that clubs work through the following check list. This circular should be read in conjunction with SLSA Circular 93 2014-15 - IT Systems End of Season Procedures. Clubs need to also follow their State's Standard Operating Procedures when performing these activities.

IT SYSTEM ENHANCEMENTS – major changes implemented in 2014-2015

SLSA IT has rolled out a number of significant changes in 2014-15 that affects some of the processes you might use:

- Lifesaving Online is now integrated into the Member Portal at **portal.sls.com.au**.
- **sls.com.au/join** – a new and simpler way for NEW members to join your club
- Patrol Substitutions feature
- The SLSA Surf Shop can now only be accessed by club members and/or officers within the Members Portal. Log into the Members Portal and select the “Club Store” tab.
- Branches and Clubs can use the Portal Library to make available files to their own membership.
- eLearning, virtual groups and scheduled events allows your CTO to manage eLearning internally.
- More member Bulk processing features

IT SYSTEM ENHANCEMENTS – major changes to come in early 2015-2016

SLSA will roll out during July and August some significant new features such as:

- Family Group management
- More self service functions in the Portal/Lifesaving Online
- Bulk proficiency management
- Payment Gateway improvements
- More Bulk processing features (such as member / child protection information)



SUPPORT/ASSISTANCE and TRAINING

If you need assistance with anything contained within this Circular, please consult the relevant User Guide (Surfguard, Members Portal, Lifesaving Online, Patrol Swaps/Subs or Payment Gateway) which can be found on the Members Portal (Library / Administration / IT / SLSA / Guides) or via SLSA website www.sls.com.au/downloads (Information Technology / User Guides). Several video tutorials are also available on the Surfguard login page.

For support with any of our systems call the Helpdesk 1300 724 006 or log a ticket <https://support.sls.com.au> Alternatively you can email ithelp@slsa.asn.au

If additional training is required for Surfguard, Members Portal & other SLSA IT Systems. Clubs in QLD & NSW should contact their Branch. Clubs in all other states should contact their State Centre. Branches/States should email ithelp@slsa.asn.au to submit a training request. Please provide systems to be covered, location of training and suggested dates.

START OF SEASON CHECKLIST

ACTIVITY		DESCRIPTION	TASK COMPLETED
1	Surfguard User Management		
1.1	User permissions and access levels	Produce a report of your clubs current Surfguard Users. Complete a SLSA Form 049 – IT Systems Access Form to add, modify, reactivate or deactivate a club officer’s Surfguard access.	
2	Memberships		
2.1	Member Portal Accounts	Distribute to members instructions on how to access the Members Portal and gain access to Lifesaving Online for online membership renewal.	
2.2	Change your Renewal Template	Update your organisations Membership Renewal & Membership Details Cover Letter templates prior to electronically sending pre-filled in membership forms.	
2.3	Membership Renewal Forms	Electronically distribute member renewal forms	
2.4	Pending member requests	Action as required	
3	Organisational Management		
3.1	Officer Positions	Add/update & modify Officer Positions	
3.2	Committees	Update and/or add Committees	
3.3	Organisational Details	Check that Organisational Details are current	
3.4	Organisational Bank Account Details	Check that Organisational Bank Account Details are current	
3.5	Service Profile	Update your clubs patrol and other service details for the coming season based on your Patrol Service Agreement	
4.	Patrols		
4.1	Patrol Teams	Update/create Patrol Teams	
4.2	Patrol Rosters	Update/create Patrol Rosters	
4.3	Substitution management	Update default settings as required	
5	Payment Gateway		
5.1	Sign your club up for Payment Gateway	Submit SLSA Forms 075 & 079 to sign up for the Payment Gateway if you have not already done so.	



5.2	Price lists	Update & upload Price Lists with current seasons fees	
5.3	Payment Gateway receipt emails	Check that payment notifications are going to the correct club official e.g.: Treasurer/Administrator	
6	Gear & Equipment		
6.1	Update Gear & Equipment	Add/remove equipment in preparation for Gear Inspections	
6.2	Gear and Equipment Inspections & Checklists	Print out checklists	
7	Additional Activities		
7.1	Beachsafe	Ensure your club and beach details are correct in www.beachsafe.org.au	
7.2	Water Safety App	* Have Coaches/Trainers/Water Safety Coordinators obtain the Water Safety App. to manage risk . * Advise all current users of the App to check they have the most recent version installed.	
7.3	Carnival Manager Login	Ensure your Competition Director/club officer has login details for the Carnival Management System.	
7.4	Members Portal	Action "Club Forms" as necessary Ensure at least one club officer has administrative functions in the Members Portal (Form 49)	

1. Surfguard User Management

1.1 User permissions and access levels

To produce a report of your Clubs/Organisations current Surfguard users:

Reports > General Reports > Organisational Management Reports. Filter as follows:-

Report Type: Users

User Status: Active

Click the display report button.

A completed Form 049 is required to create new user accounts, amend accounts, reactivated or deactivate accounts. Please ensure the following section of the Form 49 are completed correctly:-

1. Authorising Officer Details – Executive Committee Members or Staff Members can approve. NOTE: Applicants are not able to authorise their own Form 049.
2. User Agreement – must be signed by the person who is having the account created for them.

Submit the signed Form 049 via email to ithelp@slsa.asn.au or fax to 02 9215-8180.

The Form can be accessed in several locations:

- Surfguard login page (www.surfguard.slsa.asn.au) - in the lower left corner under "Account Assistance"
- Members Portal (portal.sls.com.au, Library / Administration / IT / SLSA / Forms)
- SLSA Downloads website www.sls.com.au/downloads (Information Technology / Forms).



2. Memberships

2.1 Member Portal Accounts and using the Lifesaving Online features

Now that all the functions of Lifesaving Online are within the Members Portal, clubs should be encouraging their existing members to create Member Portal accounts. Suggested ways to do this include:-

- Print off the 'SLSA Members Portal Account Guide – Getting Started' and 'Members Portal flyers and put up around your club eg: Noticeboard, change rooms, First Aid room, training room, main entrance.
- Update your website with information on: How to create a Portal account and provide a link to the Members Join/Rejoin page: Link to <http://sls.com.au/join>. Members can then be directed to either the Portal or the new Join function.
- Email your members the document 'SLSA Members Portal Account Guide – Getting Started' and the 'Members Portal flyer' to assist them in creating portal accounts.
- Update the Membership Renewals Template in Surfguard advising members they have an option to renew online via the Members Portal. Remind members they must use the First Name, Last Name, Date of Birth, Email and Mobile details that are listed on the Membership Renewal form. See 2.2 below for instructions on how to update the template.

These Guides and Flyers can be accessed in several locations:

- Members Portal (<portal.sls.com.au>, Library / Administration & IT / IT / SLSA / User Guides)
- SLSA Downloads website www.sls.com.au/downloads (Information Technology / User Guides).

Once members have created their Portal account they should then be encouraged/directed to click through to Lifesaving Online to renew their membership by submitting an online membership application, check their awards or patrols, and update their details.

New members, or those returning to an organisation after an absence of more than 2 seasons will not be able to create a log in account to the Members Portal and will be directed to the NEW Join system.

<http://sls.com.au/join>

2.2 Change your Renewal Template in Surfguard

There are two default templates in Surfguard: Membership Details and Membership Renewal Form. When club officers use the option of emailing out either Membership Details or Membership Renewal Forms they can choose to include the appropriate Template cover letter. Use the Maintenance/Templates menu for full edit functionality and to save the new format of the template. Alternatively you can update a template on the 'fly' when in the *report – general report – member report – Membership Renewal Forms (advanced search)*. NOTE: Any changes made to the template on the 'fly' are not saved once sent.

2.3 Membership Renewal Forms

To email Members a prefilled Membership Form from Surfguard: Go to *Reports > General Reports > Member Reports*.

Report Type:	Membership Renewal Form
Output Format:	PDF
Click:	Advanced Search
Renewal Season:	2015/16
Status:	Active



Registered Season: 2014
Email to Members: Tick box
Declaration: Tick box
Print Cover Letter: Yes – Please use the Maintenance/Templates menu for the full edit functionality. Changes made here will not be saved.
Print Declaration: Yes
Print Membership Details: No
Display Report here: Leave as ticked. (do not select 'Send Report via Email')

Click Display Report.

This will send your email out to selected members.

Surfguard will then produce a report advising which members have been emailed their prefilled membership form (see end of report for list) and provide you with pre-filled membership forms for those without email addresses.

Important Note: If electronically sending or printing forms for all your members, it is important to break the output up into a number of groups based on age/name/membership category (as this report can be large, if you print for all members at once it may not work). To do this, print one output of all members with last names starting from 'a' to 'c', then another output of members from 'd' to 'f' etc.

2.4 Processing Pending Member Requests in Surfguard

Joining or renewing a membership, is a two stage process:

1. Submit a membership/renewal form
As a club administrator, you will receive "Pending Member Requests" in Surfguard when a member has joined or renewed electronically or if they have changed their details.
2. Make payment
Payments made by members via Members Portal > Lifesaving Online will be logged as a transaction in Surfguard. Payment Notifications are automatically sent to the email address designated by the club in the Payment Gateway.

Processing Pending Member Requests in Surfguard

Administrators need to 'accept' or 'reject' new memberships and membership renewals submitted electronically before any data is updated in Surfguard. On the Surfguard home page club officers can see how many 'pending requests' they currently have. To action 'pending requests' in Surfguard go to Members > Pending Member Requests.

To process Pending Member Requests – **New Club Memberships:**

- tick the box relating to the member seeking new membership
- click Manually Process/View Request
- check that the correct membership category & registered season has been entered
- click the save button.

To Process Pending Member Requests - **Renew Club Membership:**

- tick the box relating to the member seeking to renew membership
- click Manually Process/View Request
- all changes made by the member will be displayed in 'green'.
- to accept these changes individually click the 'green' tick box alongside the specific change
- to accept all the changes in one go click the 'green' tick box located at the top of the page
- click the save button.



3. Organisational Management

3.1 Officer Positions

When your club has held their AGM and elects / re-elects officers to positions within the club, the information needs to be updated in Surfguard. To do this go to Organisational Management > Officers > Officers . This information is used by Branch, State & SLSA to communicate with specific Officers relevant to the position they hold.

If an Officer has been re-elected to the same position for another season:

- locate the Officer from the View Officers list
- click the 'edit' button under *Officer Options*
- Amend the 'to date' field
- Update

If a new Officer has been elected to a position:

- locate the Position Name from the View Officers list
- click the 'new' button under *Officer Options*
- Select the Officer from the drop down list
- Select a 'From' and 'To' date
- Save

If you create a new position (synonym) please ensure that you link that position to the existing Surfguard defined position (*Organisational Management > Officers > Officer Position Synonyms*).

3.2 Committees

To create a Committee Group in Surfguard:

Go to Organisational Management > Committees

- Create a name for your Committee
- Select the positions you require to be on the Committee/Board
- Tick whether it is a Committee or Board
- Add

To add members to a committee:

- Click 'Members' adjacent to the committee name you wish to action.
- Drag across the members that you wish to add.
- Save

Add Committee Details

Name:

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

Positions:
Secretary
Treasurer

Type: Committee Board

3.3 Organisational Details

Go to Organisational Management > Organisational Details > Organisational Details to check details are correct and up to date e.g. Contact details, ABN, logos, etc. Information in this section of Surfguard is sent to other SLSA applications including Beachsafe & Surfcom. Click 'Edit' at the bottom of the screen if any changes need to be made.

3.4 Organisational Bank Account Details

Check your Organisations Bank Account Details are correct and up to date. Go to Organisational Management > Organisational Details > Bank Account Details then 'Edit' if any changes need to be made.

NOTE: If you use the Payment Gateway and have changed your bank account details, see Section 5 of this Circular as additional procedures need to be followed to update your clubs bank account details on the Payment Gateway.



3.5 Service Profiles

Go to Organisational Management > Service Profiles to view your clubs patrol service details. This information also displays on a number of SLSA related websites including the Beachsafe website and App. The general public is able to view on Beachsafe when your beach is patrolled, so to ensure public safety it is important that your Service Profile reflects your current patrol service agreement.

4. Patrols and Rosters

Once Patrol Teams and Rosters have been confirmed they can be entered into Surfguard. One off patrols can be entered as an 'Unrostered Patrol' eg Christmas Day Patrol

4.1 Patrol Teams

Editing Patrol Teams

Editing existing patrol teams does not change any of the data already saved in previous Patrol Logs

Creating A New Patrol Team

To create a team go to Patrols > Manage Patrol Teams > Add a Patrol Team.

Type in the name of your new patrol team and save.

Team Name	Actions
1 - Kevin Quinn Patrol Team	Edit Delete Members Roster
2 - John Dynan Patrol Team	Edit Delete Members Roster

Assigning Members to a Patrol Team:

Patrols > Manage Patrol Teams > Manage Patrol Teams

Click Members > Click "Edit Team Members"

Select or remove team members as appropriate and Save

The system will display your patrol team together with their award information

Multiple Positons in a Patrol Team

Avoid entering members in several positions (e.g. do not enter a member as both "First Aid Officer" and "Member") as this will create extra entries in the Log.

Award/Proficiency Requirements for Members In A Patrol Team

States are responsible for the setup of Award/Proficiency requirements for all positions in a patrol team. Some States enforce the Award/Proficiency requirement for specific positions and if it is enforced a member cannot be added to a specific positions if they don't meet the Award/Proficiency requirements. For those states that do not enforce the Award/Proficiency requirements Surfguard provides a **warning** if a member does not hold the appropriate Award/s or the Award is not proficient. A **'No'** displays in the Team Members display. If a **'No'** displays next to any members name the Club officer/administrator should do further investigation to determine why.

Position	Member	Award(s) Held?	Last Proficiency
Patrol Captain	Snow, Jon	No	Bronze Medallion: 04/11/2013
Vice Captain	-	-	-
IRB Driver	-	-	-
IRB Crew	-	-	-
ART Operator	-	-	-
First Aid Officer	-	-	-
Award Member	-	-	-
Member	-	-	-

* One or more Members fail to meet the awards criteria.

[Continue](#) [Back](#)

[\[Details of Patrol Positions and Awards\]](#)



4.2 Patrol Rosters

To add patrol roster to a patrol team

Patrols > Manage Patrol Team > Manage Patrol Teams:

- Click “Roster” for the patrol team concerned
- Select dates that the patrol team has been rostered (you can filter this to only display weekend days)
- Select the times for each rostered date.
- Click ‘Add’ and the patrol team’s roster will display on the right hand side of the screen.

The screenshot shows the 'Patrol Roster - Team A @ Test NSW Club' interface. It includes a date range selector, a list of available dates, a selected dates list, and a table of existing rosters. The 'Add' button is highlighted at the bottom.

4.3 Patrol Swaps/Substitutions

The new Patrol Swap/Sub function can be managed by members via Lifesaving Online in the Members Portal. Members can create a sub request and the request will display to members who are eligible to sub for the member. Members can view the **SLSA Patrol Swap - Members User Guide v1** in the Portal Library (Administration / IT / SLSA / Guides)

Club officers/administrators are able to manage Patrol Sub/Swaps in three sections of Surfguard:-

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

Club Officers/Administrators can view **SLSA Patrol Swap - Surfguard Administrators User Guide v1** in the Portal Library (Administration / IT / SLSA / Guides)

5. Payment Gateway

The SLSA Payment Gateway (<http://pay.slsa.com.au>) is a secure online payment system managed by Westpac. Clubs must register for the Payment Gateway to enable members to pay their membership fees when renewing via Members Portal - Lifesaving Online.

For transactions made through Lifesaving Online Surfguard records the payment details under the Transaction section of the members’ Surfguard account.

5.1 Sign your club up for the Payment Gateway

SLSA recommends that all Clubs use this facility to make the collection of any payment to your club efficient and easy for your members. To enable the SLSA IT Department to setup your account please follow these simple steps:

- Enter your clubs Bank Account details in the Organisational Details area of Surfguard
- Fill out the Form 79 - Direct Debit Request Form
- Fill out the Form 75 – Bank details Information Form
- Send Form 75 and 79 to SLSA IT Department

The Forms can be found on the Members Portal (Library / Administration / IT / SLSA / Forms) or from sls.com.au/downloads (Information Technology / Forms). If you need any more information regarding the Payment Gateway, contact the Helpdesk: 1300 724 006 / ithelp@slsa.asn.au.

5.2 Update/Upload Price Lists to reflect current season fees

Clubs can upload their own Price List to the Payment Gateway. This facility enables clubs to administer prices from one central location and to quickly and easily update. Instructions for how to upload a Price List are in the SLSA Payment Gateway User Guide. The guide can be found on the Members Portal (Library / Administration / IT / SLSA / Guides) or from sls.com.au/downloads (Information Technology / User Guides). A sample Price List can be downloaded from sls.com.au/downloads under User Guides **NOTE:** the Price List needs to be created in a set format



5.3 Update your clubs details on the Payment Gateway

If your club has a Payment Gateway account and your bank account details have changed, or your Treasurer/Administrator is not receiving payment notifications, you must complete a Form 075 (available from the Members Portal Library / Administration / IT / SLSA / Forms) or from sls.com.au/downloads (select IT / Forms)) and email the form to ithelp@slsa.asn.au. **NOTE:** The Payment Gateway can only send email payment notifications to one email address.

6. Gear and Equipment

6.1 Update Gear and Equipment lists

Ensure any new Gear and Equipment has been entered into Surfguard and delete any equipment that has been decommissioned. Gear and equipment can be accessed via Organisational Management > Manage Gear & Equipment.

6.2 Gear and Equipment Inspections & Checklists

Once your club has checked that all gear and equipment is recorded in Surfguard, gear and equipment checklists can be printed. To print off pre-filled gear and equipment checklists, use the 'Print checklist' button next to your gear and equipment categories.

7 Additional Activities

7.1 Beachsafe

Go to www.beachsafe.org.au and click all the tabs to ensure your Club/Beach details are up-to-date. As previously advised, Beachsafe gets information from the 'Organisational Details' tab in Surfguard. Information also comes from ABSAMP (Australian Beach Safety And Management Program). Contact your State Centre if information, other than the details in Organisational Details, needs updating.

More information can be found in the 'Beachsafe Information Guide for Clubs' in the "SLSA Beachsafe Club Branch and State Admins – User Guide" available on the Members Portal (Library / Administration / IT / SLSA / Guides).

You can add your club's open day and/or rego day in the Events section of Beachsafe. Go to www.beachsafe.org.au and search for your beach. Click 'Create Event' on the right of the screen. Add all details, ensuring date and times are correct. Once the event has been submitted and approved by SLSA it will appear on Beachsafe.

7.2 Water Safety App

The Water Safety Application (available for iOS and Android devices) was developed by Surf Life Saving Australia to assist Surf Life Saving Clubs and Services around Australia to fulfil the requirements of the National Water Safety Policy 1.1.

Coaches/Trainers/Nipper Managers can obtain the Water Safety App by sending an email to ithelp@slsa.asn.au stating which device they would like the App on and the email address they would like the invitation sent to.

If your members have a new device or are not sure if they have the latest version of any of our SLS Apps installed they should do the following on their device:-

1. Browse to: rink.hockeyapp.net
2. Login with your Username & Password. If you have forgotten your password click the "Forgot your password?"
3. Once you log in you will be able to see all the Apps that have been assigned to you, click the App you need to install and you will then be given an Install option.



7.3 Carnival / Sport Event Management System

Our developers are currently working on a new fully integrated and specifically designed sports management system to replace the Carnival Manager system. The new Sport Event Management System (SEMS) will be integrated into the Members Portal as well as the Results database and will allow for events to be created at Club/Branch/State/National levels. It is anticipated the new SEMS system will be rolled out for testing at selected carnivals at the end of 2015. The current Carnival Manger system will also be used until the end of the 2015/16 season.

7.4 Members Portal

Club Member Portal Administrators with Content & Form Approval administrative functions should regularly be checking My Tasks and My Forms to see if any club member content or forms need approving.

Support

Log a ticket <https://support.sls.com.au>
Ph: 1300 724 006
Email: ithelp@slsa.asn.au
Helpdesk Hours: Monday to Friday: 8am to 6pm
Saturday and Sunday: 9am to 1pm