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Part 1

SurfGuard Users — Clubs
1. Introduction

1.1. About SurfGuard

The SurfGuard national membership and club administration database has undergone a phased process of implementation around Australia. SurfGuard is a new, fully web-based front-end that has been built for the database, using open, international web standards, and conforming to the Surf Life Saving Australia (SLSA) Information Technology (IT) Strategic Plan. SurfGuard caters for around 350 User Groups and contains details about over 300,000 individual members.

What this means is that the entire system, source code and all, is owned by Surf Life Saving Australia. It also means that data sharing and management will be much more streamlined and efficient and that users will be able to access the system from any computer connected to the internet.

1.2. How to use this book

The purpose of this User Guide is two-fold. It is both designed as a training resource for those undertaking training in Club administration, and a reference tool for those already involved in Club, Branch or State administration.

This User Guide is divided into multiple sections, each focusing on the purpose and use of a separate section of the SurfGuard software. It follows the same order as the content presented on the SurfGuard site (i.e., Summary, Members, Assessments, Transfers, Organisational Management, Patrols, Mailing Groups, Messages, and Reports). Unless specified, all examples are based on Club-level access. Each section concludes with a Summary, which includes ‘Tips’.

1.3. Registration information

Before attempting to login to SurfGuard, you must have a User Account set up on your behalf. This is done by completing the IT systems Application form (SLSA F049), which can be downloaded via the ‘Admin and Resources’ link on the SLSA website. Then select the folders ‘SLSA forms’ > ‘Information Technology’. The completed form must be returned to the SurfGuard Manager at SLSA. Further information and assistance can be obtained from the SurfGuard Manager via email at: SurfGuardhelp@slsa.asn.au.

When you apply for a User login you can choose from Full or Browse access to a number of areas within SurfGuard, as well as from the multiple databases available — Membership, IRD, ABSAMP and so on. Users should be clear about what access is appropriate. Check with your Club Administrator for more information.

1.4. Logon instructions

The SurfGuard Entry Point is found by navigating from the Home Page of the Surf Life Saving Australia website, as shown in Figure 1.4.a. (www.slsa.com.au), via the Quick Links panel on the right hand side of the page.
Once you are at the SurfGuard Entry Point screen, you will need to enter your Username and Password, as shown in **Figure 1.4.b**. To make logging in quicker next time, consider saving this screen to your favourites.

![SurfGuard Entry Point login screen](image)

## 1.5. Messages

You will notice that the SurfGuard Entry Point screen also displays relevant update messages. This includes messages to all SurfGuard users about system updates and other important messages. An example is shown in **Figure 1.5.a**.
1.6. SurfGuard Help Desk

If you experience any difficulties when trying to login or when using SurfGuard, call the SurfGuard Helpdesk on 1300 724 006 or email: SurfGuardhelp@sla.asn.au. The Help Desk is staffed weekdays from 9 am to 5 pm EST. Once you are logged on to SurfGuard you can access the ‘Help Desk’ details at any time by selecting the “Help Desk” link.

1.7. Navigating SurfGuard

Once you have logged onto SurfGuard, you will automatically be taken to the ‘Memberships@’ summary screen (see Figure 1.7.a.). A summary of outstanding tasks including membership updates, assessments, transfers, messages and pending member requests are listed on this screen. Further information about accessing, creating and sending messages is in Section 9.
environment you are within and the application or database that you are accessing, as well as your registered username.

Your SurfGuard user account is set-up to give you relevant access to the national membership and club administration database. If you are a registered club user you will have access to your club’s information. This is indicated in the organisation area of the toolbar — your club name will be available in the drop-down list. Likewise, branch and state registered users can select any club from their branch or state from the drop-down list to view information for that club.

Another feature of SurfGuard is the ability to ‘practice’ within the Playpen environment, using real (but not live) data. When you select the Playpen environment, any changes you make will not be saved to the national database. Regular users should ensure they use the production environment when updating the national database. The application area indicates which part of the national database you are working within.

The Playpen area can be accessed via the drop-down menu where the domain ‘Environment’ is shown. This area is used by Club and Branch Administrators, and other Managers, who want to test changes before they are implemented into production. If you would like Playpen access, ensure you specify this on your Registration from (SLSA F049).

The lower navigation bar, or Main Menu, allows you to access different functions within SurfGuard. These options are referred to as the Main Menu items. Sub-menu items are indicated by a down-arrow to the right of the Main Menu item. For example, you can add a new club member by rolling your cursor over the Members item and clicking the Add Member tab.

The Third Line Menu includes a short-cut to the SurfGuard home page. Depending on your level of access, this will take you to the ‘Memberships@’ page. By clicking the ‘Help Desk’ link, a new window opens up giving you the relevant contact details. Both the ‘Suggestion Box’ and ‘Report a Bug’ links will initiate an email to the Help Desk.

You will also notice that clicking some links opens a new window in your Internet Browser. This new window can be closed, without affecting your login status to the main program, by clicking the red ‘X’ in the top right-hand corner of the window.

For convenience, the post log-in screen now displays four ‘Quick Reports’. These are simple shortcuts to the four most commonly accessed reports: Contact Details, Current Awards Bronze Medallion, Patrol Rosters and Total Member Patrol Hours — Season. To run any of these reports, click their link (see Figure 1.7.a.).

### 1.8. Logging off

When you have finished using SurfGuard, click the ‘Log Off’ link to end the session. The ‘Log Off’ SurfGuard’ screen will then be displayed (as per Figure 1.8.a.), indicating that your session has ended.

**Log Off SurfGuard**

You have successfully logged off.

Click here to re-login.

**Figure 1.8.a. Log out confirmation**
1.9. Data integrity

As a database, SurfGuard is only as good as the quality of the data loaded into it by users. It is a good idea to check that you have spelt and punctuated member and place names correctly, as this will affect the accuracy of the information on which your Club relies. Data entry should be checked before it is submitted and rechecked when renewal forms or other data is being entered. Wherever possible, ensure that all fields are filled out on template forms and that you check regularly for duplicated member records.

1.10. SurfGuard security

The SurfGuard database security is set up on a Child (Club), Parent (Branch) and Grandparent (State) and Great Grandparent (SLSA) pyramid structure. People who have access at a higher level can see the data below them in the structure. Clubs consist of Surf Life Saving Clubs as well as Services such as RWC operations and Lifeguard Services. Where a State has no Branches, all Clubs are entered in the ‘Misc Branches’ for that State.

As this User Guide is structured to follow the layout of the SurfGuard interface, it is suggested that new users read the Guide whilst also viewing the site online. To save time, add the SurfGuard Entry Point page to your favourites.

Those with Club access can only see their own Club data and the membership details of their Club. For membership types, data entry screens and the processes required to enter data follow the SLSA Regulations and Policies all of which can be found at www.slsa.com.au.

Changes to these screens need to be nominated through each State and agreed to by all States before they are implemented. This may cause some delay in suggestions being implemented. It is also important to note that levels of access can be different for all users based on their required use of SurfGuard. For example, Chief Instructors might have read-only access to all data except full Access to the assessments area of SurfGuard. These permissions ensure that only correct information is being entered into SurfGuard.

A person’s record is the centre piece of data in SurfGuard around which all records are based. A person is a member of an entity (Club or Clubs) which is connected to a Branch / state etc. Awards, Patrols and other details are attached to the member record and used by many parties in the organisation; therefore, it is vital that all member details are kept up to date.

Tips

To log on to SurfGuard: enter your registered username, enter your password.

SurfGuard is a web based application that allows members, clubs, branches and state groups of Surf Life Saving Australia to access the national membership and club administration database. It also provides information to members of the public who are participating in SLSA Activities.

Information about SurfGuard registration can be obtained from the SurfGuard manager (SurfGuardhelp@slsa.asn.au). The registration form can be downloaded from the website. The SurfGuard help desk can be contacted on phone 1300 724 006 or via the above email address.

To find SurfGuard on the SLSA website: go to www.slsa.asn.au, and follow the SurfGuard link in the Quick Links area.
2. Summary

2.1. Using summaries

Some routine administration tasks can be viewed via the Summary function. Depending on your level of access to the database, when you login to SurfGuard, you will see the ‘summary’ menu item at the top left. The summary page is a quickly accessible outline of all SurfGuard areas including awards, patrols and the breakdown of your memberships. The Summary information available is grouped into categories; these being: Assessment Requests, Awards, Membership, Patrols, Proficiencies and Transfers.

You can change the summary view by selecting an alternative category from the drop-down ‘Display’ menu. You can also look at historical data by changing the year in the ‘Season’ field. All fields shown in these lists are clickable links that will take you immediately to a listing of all relevant members.

“Display Statistics” under the Summary Menu will display a variety of statistics in a graphical format. It is aimed at organisations that would like to display these statistics to the public in their foyer on a large screen. The user can specify the image refresh rate.

2.2. Displaying summaries

To display a summary select from the options in one or more of the fields in the top panel and click the ‘Go’ button or press ‘Enter’ on your keyboard (see Figure 2.2.a.). You can sort the data to be displayed in the summary by including or excluding non-financial members or by including or excluding proficiency assessments by clicking the check-box for that option.

Figure 2.2.a. Create a summary using the drop-down Display
2.3. Assessment Request Summary

The Assessment Requests Summary is sorted based on two assessment types: Awards and Proficiencies. Data can be viewed based on a variety of award types and their status or level of completion. There are a number of ‘Status’ categories, including the following.

- **Incomplete**: The assessment has not been submitted for approval to branch or state. The club is still able to modify any of the assessment details.
- **Awaiting Approval**: The assessment has been submitted for approval to branch or state. This step is skipped for proficiencies.
- **Exam Approved**: The assessment has been approved by the branch or state. The assessment results can now be processed.
- **Exam Rejected**: The assessment has been rejected by the branch or state. The assessment will not take place and this entry can now be archived. A new Assessment Request should be created once the issue has been resolved.
- **Exam Cancelled**: The assessment has been deleted. An assessment can be deleted by Branch or State at any stage before the award is allocated. A Club can only cancel/delete an assessment before it is submitted for approval to Branch or State.
- **Awaiting Candidate Approval**: The results have been entered for the members. Branch or state needs to approve the results and may also amend any of the results.
- **Award Allocation**: The issuing authority (State or National) will grant an award/qualification once the paperwork is checked. The award will then appear against the member’s name.

To see the detail of outstanding assessment requests, click the ‘Incomplete’ link. This will take you to the Assessment Request screen. From this screen you can perform a number of actions, including modifying, cancelling or submitting the request, depending on your access level.

2.4. Awards Summary

There are two types of Awards Summaries available. The first, ‘Awards: by Current Membership Location’, provides a list of all new awards and proficiencies held by members of your club or that fall within clubs in your branch, state for the selected season. The second option is ‘Awards: Originating FROM This Club’ and lists new awards that members have gained from your club specifically or a club within your branch, state for the selected season.
When viewing the ‘Awards: by Current Membership Location’ report, by clicking the award type link (e.g. Bronze Medallion) you can view a list of members’ names, the date each member gained their award or proficiency and any relevant expiry date. By clicking the ‘Awards’ link beside each member displayed, you can view a full list of that member’s awards and proficiencies.

Depending on your level of access, further sorting options are available when viewing a list of members with the specified award. As an example you may have the option of checking to view archived members in your list.

![Avoca Beach Summary Details](image)

**Figure 2.4.a. Awards Summary Details**

### 2.5. DEST Report — Printed Certificates/Statements

The 'DEST Report — Printed Certificates/Statements' is the Department of Education, Schools and training quarterly report. Each state is required to report on the award certificates/statements it has issued. It totals the printed certificates — not the awards allocated — during the selected quarter. Re-prints are not included in the totals. The following items are totalled:

- Certificates to Members
- Certificates to Non-Members
- Statements of Attainment to Members
- Statements of Attainment to Non-Members
- AQTF Certificates to Members
- AQTF Certificates to Non-Members
- Total Issued for the quarter
- Total Issued for the current Financial Year to Date
2.6. Membership categories summary

The Membership Categories Summary is a list of all the club's members sorted based on their membership category. Membership categories follow the SLSA Regulations and Policies, which can be found at www.slsa.com.au

The following membership categories are used:

- Junior Activity Member (5-13 years)
- Cadet Member (13-15 years)
- Active (15-18 years)
- Active (18 years and over)
- Reserve Active
- Probationary
- Associate
- Award Member
- Long Service
- Life member
- Honorary
- General
- Academy (Non-Members)

2.7. Patrols summary

'Patrol Hours — Top Members' will display the top ten members based on the total to date of their patrol hours for a given season. ‘Patrol Hours — Organisations’ will display the total patrol hours for the given club or clubs within a branch, state (Figure 2.7.a.). A Patrol statistics summary (Patrol stats) is also available which will output a clubs total patrol statistics for a given season.

![Central Coast Branch Summary Details](image)

<table>
<thead>
<tr>
<th>Central Coast Branch</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoca Beach</td>
<td>6414.25</td>
</tr>
<tr>
<td>Central Coast Branch - RIVC Group</td>
<td>0</td>
</tr>
<tr>
<td>Copacabana</td>
<td>5078.25</td>
</tr>
<tr>
<td>Kincgro</td>
<td>4302.75</td>
</tr>
<tr>
<td>MacMaster</td>
<td>5530.00</td>
</tr>
<tr>
<td>North Avoca</td>
<td>4277.25</td>
</tr>
<tr>
<td>North Entrance</td>
<td>3930.25</td>
</tr>
<tr>
<td>Ocean Beach</td>
<td>4918.75</td>
</tr>
<tr>
<td>Shelly Beach</td>
<td>5420.25</td>
</tr>
<tr>
<td>Soldiers Beach</td>
<td>6318.25</td>
</tr>
<tr>
<td>Tangaal</td>
<td>9717.00</td>
</tr>
<tr>
<td>The Entrance</td>
<td>3969.00</td>
</tr>
<tr>
<td>Tugun Lakes</td>
<td>5055.00</td>
</tr>
<tr>
<td>Tweed Heads Bay</td>
<td>5146.00</td>
</tr>
<tr>
<td>Umina</td>
<td>2283.75</td>
</tr>
</tbody>
</table>

Figure 2.7.a. Patrol Hours organisations summary screen
To view the patrol totals for each club within a branch, click the branch name. In an easy to view tree structure, the clubs will appear below the branch and the respective totals will be listed for each.

### 2.8. Proficiencies Summary

The Proficiencies Summary screen shows the proficiencies gained during a given season. In addition to only re-qualifications, you may also select the check-box to display proficiency awards gained for the first time.

### 2.9. Transfers Summary

The Transfer Summary screen shows the numbers of members transferring in or out of your club, branch or state during the specified season. You can use the Transfers area within SurfGuard for organising member transfers easily between your club and other clubs.

#### Tips

- Change the summary view by using the drop down ‘Display’ menu.
- View season data by changing the year in the ‘Season’ field.
- Create a summary by selecting from the options in one or more of the fields in the top panel and click the ‘Go’ button.

#### Summary

The Summary information available is grouped into the following categories:

- assessment requests
- awards
- membership
- patrols
- transfers
3. Members

3.1. Members

The ‘Members’ tab allows you to access member information and process membership changes. The Members section of the database is divided into the following categories:

- Find Member
- Add Member
- List Members
- Bulk Processing
- Pending Member Requests

3.2. Find Member

Searching for a member in SurfGuard is very easy. Simply go to the ‘Find Member’ sub-menu screen (Figure 3.2.a.) and enter the member’s details such as first name, surname and (if known) member ID number, and then click the ‘Submit’ button.

Data can be further sorted using the options listed on the screen. The options allow you to include active, archived, suspended and/or deceased records, as well as enabling you to search on part of a name or return only members with Awards, Patrol hours, etc. Making the search as specific as possible will speed it up. For National, State and Branch users, mandatory input of at least 2 characters of the first name/surname or 5 digits of the member ID are required when searching for active or archived members.

![Find Member search screen](image)

**Figure 3.2.a.** Find Member search screen

You can then view a range of member details from the resulting list. You can view the full details for a member by clicking the relevant link. For example, click the ‘View’ link to access an individual member’s details (as shown in Figure 3.2.b.).
If a person belongs to more than one organisation, instead of listing them many times, the Find Member screen will now display the member only once and a link is provided to view all the persons organisations and details related to them (Figure 3.2.c.). To turn off this feature, use the checkbox beside Return single row for multi-memberships on the Find Member screen (Figure 3.2.a.).

Figure 3.2.c. Members belonging to several organisations

3.3. Add member

You can simply add a member by clicking the ‘Add Member’ sub-menu button. You can then add all an individual’s details using the drop-down option lists on this screen (as shown in Figure 3.4.a.). A red asterisk (*) indicates a field that must be completed for the record to be successfully submitted to the SurfGuard database.

Mandatory fields include First Name, Last Name, Gender and Date of Birth. These criteria help identify individual sets of data within SurfGuard. By clicking the ‘Check for Duplicates’ button, you can search the database for similar entries using these four mandatory fields. A member’s occupation will automatically default to “Student” if the member is aged up to 16 years old.

For example, if two family members with the same name join the same Club, they will be differentiated by their respective dates of birth.

Note: If a member does not wish to receive club communications via email and/or SMS then you must tick the Do not send email/SMS communications checkbox location in the members ‘Other Details’ section.

Returned Mail flag

A checkbox has been added to each address type (Home, Postal and Emergency Contact) within members details. This allows club administrators to flag the address if it is incorrect and mail has been returned to sender. The flag has been added to a
number of member details reports giving access to reporting on all members with incorrect addresses.

3.4. List members

The list members view contains a list of all Active members in your organisation. From this screen you can view or edit each individual member’s record or complete transactions or patrol details pertaining to individual members (see Figure 3.4.b). It should be noted that, where the Club List runs onto a second page, you can access the next screen by clicking the ‘Next >>’ link. This list can be alphabetically sorted using the letters above the list or by clicking the column header to sort by a specific column.

When an individual member record is selected, you can access the member’s awards, patrols and transactions data by clicking the member links.
### Figure 3.4.a. Add Members details screen (see Legend, below)

#### Legend

1. Name
2. Gender
3. Date of Birth
4. Occupation
5. Home Address
6. Postal Address
7. Phone Numbers
When editing a member, mandatory fields are marked with a red asterisk. When archiving a member (or setting their status to deceased or suspended), you may specify to remove them from patrol teams, mailing groups and/or internal memberships. A number of options will be displayed when the archive, suspended or deceased statuses are selected.

**Note:** When you are viewing a member’s record, you can email the member direct from this screen. To email a member from their member record, click the ‘Email Member’ link below their email address.

### 8. Email Details

### 9. Licence Details

### 10. Clothing sizes

### 11. Does member want to receive email/SMS?

### 12. Organisation specific information

### 13. Working with children (Child protection) information

### 14. Medical details

### 15. Emergency contact information

### 16. Members background

### 17. Qualifications and Employment information

#### Figure 3.4.b. List Members Screen

When editing a member, mandatory fields are marked with a red asterisk. When archiving a member (or setting their status to deceased or suspended), you may specify to remove them from patrol teams, mailing groups and/or internal memberships. A number of options will be displayed when the archive, suspended or deceased statuses are selected.

**Note:** When you are viewing a member’s record, you can email the member direct from this screen. To email a member from their member record, click the ‘Email Member’ link below their email address.

#### 3.5. Bulk Processing

You can easily process a number of club members at once by using the ‘Bulk Processing’ sub-menu. This will allow you to carry out a number of administrative processes: activate members, archive members, register members for the current season or previous season and a number of other options. More functions will be added to this feature over time.

Once you have selected a processing type from the drop-down option list, you need to select the relevant State, Branch and Club if need be. Then you can highlight members by clicking their name and using the arrow to transfer members from the Available Members list to the Selected Members list.

The quickest way to add names to the Selected Members list is by holding the Control button down on your keyboard (it is marked with the letters “Ctrl”) and clicking a number of names. This will highlight a number of members at once.

You will be prompted before allowing to process any member records. Click ‘OK’ to continue or ‘Cancel’ if you want to review or change your selection. You can
clear all the fields selected and start again by clicking the ‘Reset’ button at the bottom of the form.

![Bulk Processing screen](image)

**Figure 3.5.a. Bulk Processing screen**

### 3.6. Pending Member Requests

Requests sent from Lifesaving Online (www.lifesavingonline.com.au) to update member details and renew registrations for the current season can be processed in this screen. Each request is presented on a new line and will specify the type of request, either:

- Update My Details
- Renew Registration
- New Club Membership

Each request can be approved, rejected or manually processed. Check the box beside each request you wish to process and select from the options. When manually processing requests, use the green tick (accept) or the green circle (rollback) to either accept or rollback any changes. The new information can be seen in green. Once all changes have been accepted or rolled back, make sure to click the green tick at the top of the page to accept all changes made.
3.7. Frequently Asked Questions

Q. What do I do with a member who is duplicated (has two member records)?
A. SurfGuard runs a merge duplicates facility each night. If it discovers duplicates, it will merge the member’s records together ensuring that awards and patrol hours etc are not lost. To enable SurfGuard to detect your duplicates you will need to Archive all old records of the specified member leaving only the correct record active. Then ensure that all the member’s records have exactly the same first name, last name and date of birth. The merge function will then detect the duplication, merge the records including all awards etc and the next day only the member’s correct record will be in SurfGuard.

Q. Why can’t I enter an apostrophe into a member’s name?
A. Apostrophes cause problems when exporting data from SurfGuard into reports and custom reports. To enter an apostrophe, use the left quote key ‘ which is located on your keyboard to the left of number 1.

Tips

Go to the ‘Find Member’ sub-menu screen and enter the member’s details such as first name, surname and member ID number, and then click ‘Submit’ button.

Click the ‘Add Member’ sub-menu button. Add all an individual’s details using the drop down option lists on this screen. A red asterisks indicates fields that must be completed.

The quickest way to add names to the ‘Selected Members’ list in the Bulk Processing screen is by holding the Control button down on your keyboard.

Summary

The Members section of the database is divided into the following categories:

- Find Member
- Add Member
- List Member
- Bulk Processing
- Pending Member Requests
4. Assessments

4.1. Assessments

The Assessments menu allows users to view current or past assessments or to enter new assessment information. Users can only add, edit and view information for which they have access.

4.2. Assessment Types

Award

Upon the successful completion of an assessment, the member is allocated new award(s).

Proficiency

The member must already hold the award in order to participate in the assessment for a proficiency. Upon successful completion of the assessment, the member's award record(s) is/are updated with the proficiency date.

Credit Transfer

Upon the successful completion of an assessment, the member is allocated new award(s) but does not have to actually sit an assessment since they already did the assessment at another external organisation.

Recognition of Current Competence/Prior Learning

Upon the successful completion of an assessment, the member is allocated new award(s) but does not actually sit an assessment since they have the experience from such things as work, etc.

4.3. Assessment Request List

By clicking the sub-menu item 'Assessment Request List', you can view all assessment requests that fall within your club, branch or state (see Figure 4.3.a.). Select from the drop-down options to short-list the specific assessments.
Once you have added a new assessment request, you will notice that it appears in the Assessment Request List. Information on this screen is color coded to give an instant overview of all assessments currently on the system. Incomplete assessments are coloured red, complete assessments are coloured green.

When an assessment has a status of ‘Incomplete’, you are given a chance to make any changes before you submit into the system. The ‘Update’ link allows the assessment request to be changed. If you click the ‘Delete’ link, you will be prompted to confirm that you want to delete the assessment request.

Once you have clicked the ‘Submit’ button for an ‘Incomplete’ assessment, a window will appear confirming that the information has been submitted for approval by your Branch or State. Alternatively, if the assessment is a proficiency, you will be prompted to process results once you have submitted, as approval is not needed.

When asked to ‘process results’, you can now confirm members results by putting a tick beside each member who successfully completed the assessment. For some awards, a Pool Time or Activity Time will be displayed. Members results can be recorded in the format “Hours : Minutes : Seconds”. The results are then sent to your Branch or State for approval. The status of your assessment at this stage becomes ‘Awaiting Candidate Approval’. After an assessment’s results have been approved, Assessments of Award type, will move to ‘Award No allocation’ status, in which your State will allocate the awards to the successful members. For Proficiency assessments, once the assessment is approved by your Branch or State, the member’s award will be updated with the new proficiency information.

To view further details on the assessment, click on its ID link. This presents a full summary of the assessment in question complete with all candidate, trainer and assessor information.

You can sort the list of assessments by ID, award, type, organisation, date or status by clicking on the respective column header. Throughout the assessment process, By clicking the ‘Print Attendance Sheet’ link, you can view, save and/or print a PDF file which lists all the attendees for the specified course. You can also use the “Form 14” link to generate a pre-filled form 14 for the assessment. Note: Only assessments of Award type can have a form 14 generated.

Once an assessment has been completed it will move to a status of ‘Completed’.

Please note that only States can archive Award assessments since they need to do extra processing upon receiving notification from Clubs and Branches (such as printing of certificates, etc). Once Archived, an assessments status will be ‘Archived’ and can be viewed by selecting Archived in the Assessment Status: option in Figure 4.3.a.
4.4. New Assessment Requests

By clicking the sub-menu item ‘New Assessment Request’, you can create an assessment record for club members. You can select assessment specifics by choosing from the various drop-down options (Figure 4.4.a.). To retrieve a list of eligible members, click the “Get candidates” button, a list of members will appear that fulfil all pre-requisite requirements for the chosen award, including age and license information. Select available club members by clicking a name and using the add arrow (>).

Only members who are not already in another incomplete assessment request for the chosen award or proficiency will be listed in the available candidates list. Age, license and award pre-requisite restrictions are also implemented. To view the prerequisites for an award use the ‘Reference: Awards’ report in the reports area of SurfGuard or a quick link to this report is available under the candidates list (Figure 4.4.b.).

Minimum and maximum ages are calculated as of 30 September of the current registration season or as of the current date if past 30 September. There is also a 2 month leeway for age restrictions, so a member who turns the correct age in less than two months will appear on the candidate list.

For an assessment of “Award” type, only members who do not hold the award will appear as potential candidates. For an assessment of Proficiency type, candidates will only appear if they hold the relevant award. The only exception to this belongs to a small percentage of awards that are Proficiency only. This means that the member does not need to hold the award prior to gaining it, even though it is a proficiency type assessment. Some Awards that fall into this category are the junior activities awards.

When an assessment is complete, Awards are allocated to all successful candidates; whereas, when a proficiency assessment is completed, the candidates have successfully re-qualified an award they already hold. In the case of a proficiency, the member’s award record is updated with the new proficiency date.
Figure 4.4.a. New Assessment Request

Note: if candidates or assessors do not appear in your list then please check the ‘Reference: Awards’ report also. As well as general prerequisite information for potential candidates, the report also lists the training and assessing requirements.

When entering assessor information you are required to enter at least part of their name or their member ID in order for the search to commence. If an assessor does not appear in the list then they do not hold the required award to be an assessor for the selected award.

Candidates will only show by default if they are of 'Active' status and registered for the current season (i.e., Financial). If you require candidates who are not financial, you must tick the “Include non-financial members” checkbox before using the ‘Get Candidates’ button (Figure 4.4.b).

Once you click ‘save’ you will be asked to confirm that you want to add the assessment request. By clicking ‘OK’, the assessment request is submitted into SurfGuard.
In addition to these two types of assessment, a member can also be assessed via ‘Credit Transfer’ or ‘Recognition of Current Competence/Prior Learning’. Credit Transfer refers to an assessment that is conducted elsewhere but results in the allocation of a Surf Lifesaving Award; whereas, Recognition refers to the acceptance of previous training or experience as equivalent to the award allocated.

4.5. Frequently Asked Questions

Q. If someone does not appear in my candidate list, what do I do?

A. Use the “list candidates in other assessments” button to ensure the member is not already in another incomplete assessment for the same award. In addition use the Assessment Candidate Qualifications Check to run an analysis of a candidate in reference to a particular award.

Tips

Click ‘Assessment Request List’ to view all assessment requests for your club, branch or state.

Click ‘New Assessment Request’ to create an assessment record. Select assessment specifics by choosing from the various drop-down options.
Tips

Click Assessment Candidate Qualifications Check to list the reasons why a particular candidate does not meet the requirements for a particular assessment.

Use the “reference: awards” report to view all general and prerequisite information about each award.

Only members who are not in another incomplete assessment request will be listed in the available members.

Age restrictions are implemented as per each awards settings and prerequisite details. These can be found using the ‘reference: awards’ report

**Manual Award Number**: This is a manual number that the state can allocate to a member for an award. It will appear in the engravers report and certificate.

There can only be one member in a credit transfer type of assessment.

**Proficiency Assessments**: Only members who hold the award will be listed in the available members

**Award and all other assessment types**: Only members who do not hold the award will be listed in the available members.

Summary

The Assessment menu allows users to view pending assessments or to enter new assessment requests. Users can only add, edit or view information for which they have access to.

An ‘Award’ is allocated against a member’s record upon successful completion of an “Award” assessment.

A member’s proficiency date is updated when they have successfully re-qualified for an award they already hold. This is processed through a “Proficiency” assessment.
5. Transfers

5.1. Transfer types

The three types of transfers that can be processed are:

- complete: Used when the member is doing a complete transfer from one club to another club.

- non-competition rights: used when transferring a member to another club, however they are keeping competition rights with their original club. This will give the member Dual Membership at one or more clubs.

- competition rights: used when moving a member's competition rights to another club however still retaining their membership at their original club as a non-competitor. This will give the member Dual Membership at one or more clubs.

To view a list of membership transfers, select the relevant options from the drop-down menu in the search fields on the Transfer Summary page. By clicking the ‘Incoming’ or ‘Outgoing’ links you can view a full list of the relevant members.

![Membership Transfers Request List @ Test NSW Club](image)

<table>
<thead>
<tr>
<th>Type</th>
<th>Status</th>
<th>Winning Club</th>
<th>Losing Club</th>
<th>Direction</th>
<th>Sort By</th>
<th>Reset Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All</td>
<td>All</td>
<td>All</td>
<td>All</td>
<td>Most Recent</td>
<td>Go</td>
</tr>
</tbody>
</table>

**Figure 5.1.a. Membership transfer screen**

From this screen you can perform a number of actions, including approving or rejecting each transfer request if your access allows. As an example, once you click the ‘Endorse’ or ‘Reject’ links you are taken to a screen that displays the individual’s details and allows you to action the transfer request by clicking the ‘Submit’ button.

You can obtain further information about a member by clicking their member ID number. This will take you to a summary page regarding that member’s transfer. You can also view the contact details for the winning or losing club and their respective branch and state by clicking the club name. The summary information can also be sorted using filters contained in the drop-down options. Further information about the Transfer Summary can be obtained by clicking the ‘Help’ link.
5.2. Transfer Request Status

There are several types of Transfer Requests that can be used, as follows:

- **New**: Transfer has been submitted and is waiting for the losing club to Endorse or Not Endorse the transfer.
- **Endorsed**: Transfer has been Endorsed and is waiting for Branch or State to Approve it.
- **Approved**: Transfer has been approved by state or branch and is ready for the winning club to complete it. When the winning club hits the ‘Complete’ link, this is when the transfer actually occurs and the member gets transferred.
- **Rejected**: This means the transfer has been rejected by the branch/state user.
- **Not Endorsed**: The transfer has not been endorsed by the losing club, but it can still be endorsed by the branch/state. However, if a branch/state approves in affect, is endorsing the transfer for the club. To carry out the wishes of the club, branch/state should reject the transfer.

5.3. Transfers In/Out

When initiating a transfer you can either transfer a member out of your club and into another club (Transfer Out), or choose a member from another club to transfer into your club (Transfer In). An example of a transfer in can be seen below in figure 5.3.

The process involves selecting the club that the member is coming from and then entering their details as a name or member ID if known. Assuming the member is found, a new screen will display asking for information relating to the transfer. Once submitted, the transfer will then be available in your ‘Transfer In’ area of the main transfer Summary page.

The ‘Transfer Out’ process is almost identical however you are selecting a member from your club instead of another club.

![Membership Transfer Request @ Test NSW Club](image)

**Figure 5.3.a. Transfer In screen**
**Tips**

Use the ‘Membership Transfer Request’ screen to initiate or track a member transfer.

Choose from the drop-down options and click the ‘New Transfer In’ or ‘New Transfer Out’ links

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**Summary**

The three types of transfers are:

- Complete
- Non-competition rights
- Competition rights

The types of ‘Transfer Requests’ include:

- New
- Endorsed
- Approved
- Rejected
- Not Endorsed
6. Organisational Management

6.1. Organisational Details

The Organisational Details sub-menu allows users to view the official contact details and other general details of their own Surf Lifesaving organisation. Clubs, Branches and States can add their logo and other details that relate to the organisation. Users can only edit information for which they have administrative access — in other words, Club Secretaries can only edit Club information and Branch officials can only edit Branch information, and so on (see Figure 6.1.a.).

It is vital that Clubs, Branches and States complete this area accurately, as it determines how all other parts of the SLSA organisation contact you. You can upload a logo by clicking the ‘Browse’ button. This will allow you to select a suitable graphic file from the computer drive of your choice. Graphics should be in either in jpeg or png format.

![Organisational Details edit screen](image)

Figure 6.1.a. Organisational Details edit screen

6.2. Bank account details

To view or edit the bank account details stored in Surfguard for a club or support entity, click Organisational Details > Bank Account Details.
To edit these details your Surfguard account must have Organisational Management permissions. Click on the Edit button to revise the stored details.

**Note:** DDR Form Submitted can only be modified by national Surfguard users and this is only modified when a club or support entity signs up for the Payment Gateway.

### 6.3. Service profiles

The ‘Service Profiles’ sub-menu takes you to a screen that allows you to further edit the profile of your Club. This includes nominating the Club’s service hours, patrol details and contact information. Click the relevant link to edit each section of the Profile (see Figure 6.3.a.).

![Service Profiles screen](image)

**Figure 6.3.a. Service Profiles screen**

### 6.4. Committees

The ‘Committees’ sub-menu allows clubs to group members into functional committees. You can assign new committee’s a name and nominate positions including chairperson, secretary, treasurer and members by completing the ‘Add Committee Details’ (see Figure 6.4.a.).

To view an existing committee, simply click the ‘Name’ link. You can view a list of all the committee’s members by clicking the ‘Members’ button, and change the composition of a committee by clicking the ‘Edit’ Button.

To remove the committee from the database, click the ‘Delete’ button. By clicking the committee member’s name, you can view their individual member details.

Most Clubs have a number of Committees and each Club should have a SurfGuard record of their Management, Lifesaving and Surf Sports Committees.
6.5. Internal Memberships

The ‘Internal Memberships’ sub-menu has two options which allows you to manage internal memberships or add new internal membership categories. Internal memberships are those specific to your club, but are not recognised outside the club, such as gym membership, social club membership, etc (see Figure 6.5.a.).

To add a new category of internal membership, use the sub-sub-menu option or click the ‘Add New Internal Membership Category’ button. This will take you to the ‘Add New Internal Membership’ screen, which allows you to nominate the name of a membership category (see Figure 6.5.b.).

The display order column will simply display the internal memberships in your selected order.

To add members to an Internal Membership Category, you must move them into the category while editing the member’s record.
6.6. Officers

The Officers menu has three sub-menus under it: Officers, New Officer Position, and Officer Position Synonyms. All three items relate to the establishment and management of individuals (‘officers’) who have specific responsibilities within your club. To view the member details of an officer, simply click their name. You can change the data on this screen by clicking the ‘New’, ‘Edit’ or ‘Delete’ buttons, as shown below in Figure 6.6.a.

![View Officers @ Test NSW Club](image)

To assign someone to a position, click the ‘New’ button beside that position. This will enable you to add a club member to fill that position; you must also choose the dates that the member held that position. By selecting the ‘Use Organisation Office Postal Address’, any mailings/reports that are generated for this member will use the organisation’s postal address instead of the member’s postal address recorded in their membership record.

The Officer Position Synonyms area is used to rename positions that have been set by SLSA. For example, your club might call their Education position a Surf Teacher, therefore, renaming the positions to better relate to your organisation.

To add a new officer position to your club, click the ‘New Officer Position’ sub-sub-menu. This will open another screen that allows you to enter the name of the new position (see Figure 6.6.b.).
6.7. **Manage Gear and Equipment**

‘The Manage Gear & Equipment’ sub-sub-menu option allows you to view a list of all the equipment, tools and other resources that the club owns. From this screen, any item’s details can be added / modified by clicking the ‘Manage’ button. — from there you can add, edit and delete items of equipment (see Figure 6.7.a.). Each piece of equipment is allocated specific attributes that relate to the type of equipment.

To print a checklist for a piece of equipment, select the “Print Checklist” button beside the required piece of equipment. You can only print a checklist when you have entered at least one piece of gear into an equipment type.
6.8. Registration Season End Settings

Clubs will now need to mark when their registration season ends in order to freeze the Summary statistics for Membership Categories. A new screen, “Registration Season End Settings”, under Organisational Management allows clubs to manage the end of their season. If the registration season summary statistics period is not ended manually, it will be automatically ended on June 30 of the current year at 11:59pm EST. The ending of the registration season only affects the Summary screen.

**Tips**

Click the ‘Add New Internal membership Category’ button to create a new membership category.

View officers member details by clicking their name. Change the data on this screen by clicking the ‘New’, ‘Edit’, or ‘Delete’ buttons.

Add a new officer position via the ‘New Officer Position’ sub-sub-menu. This will open another screen that allows you to enter the name of the new position.
**Tips**

Ensure all your club/Branch/State information is entered into the Organisation Details area.

Ensure your Gear and Equipment is kept up to date in SurfGuard, by checking the list as often as possible.

Update your Positions and Committees after your election meeting, and check that details are still current as often as possible.

The ‘Organisational Details’ sub-menu allows users to view the official contact details for each part of the Surf Lifesaving Organisation.

Users can only edit information for which they have administrative access.

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**Summary**

Sub-menu options include:

- Service Profiles
- Committees
- Internal Memberships
- Officers
- Manage Gear and Equipment
- Registration Season end settings
7. Patrols

7.1. Patrols

The Patrols menu has five sub-menu options — these are ‘Manage Patrol Teams’, ‘Patrol Logs’, ‘Unpatrolled Stats’, ‘Past Patrol Hours’, and ‘Patrolling Membership Categories’. This area allows you to create patrols teams, add members to teams, roster teams on patrol, record attendance, input patrol statistics and record activities that members undertook whilst on patrol.

**Important Note:** A member’s hours are calculated as a total of all hours they have gained within the SLS organisation (all clubs/organisations the member patrols at). When reporting on a person’s hours, it is possible to either see all hours they have gained as a total across all organisations or a breakdown of hours pertaining to a specific organisation. These options are available in the reports area (see Section 11).

7.2. Manage Patrol Teams

The Manage Patrol Teams allows three further options — ‘Manage Patrol Teams’, ‘Add Patrol Team’ and ‘Add Individual as Team’. The first option screen displays the Patrol Teams your club has created. You can add, edit and view the members of each team by selecting the ‘Members’ link. You can schedule a roster for the team by selecting the ‘Roster’ link. Other actions are available for renaming or removing the patrol team by clicking the ‘Edit’ or ‘Delete’ link under the option ‘Actions’ (see Figure 7.2.a. Patrol Positions).

![Patrol Teams @ Test NSW Club](image)

**Figure 7.2.a. Patrol Positions**

![Edit a Patrol Team](image)

**Figure 7.2.b. Patrol Position Details**

By clicking the ‘Add a Patrol Team’ button on the Patrol Teams screen, you can set up a new Patrol Team. This feature is also accessed via the sub-menu.

When adding new members to a Team, the list will show all active members registered for the current season by default. To view all active members regardless of season, you must check the box marked “Include Non-Financial Members:
When managing your patrol team members it is important to note that they may not hold the correct award(s) to be eligible for the position. SurfGuard will alert you if a member does not hold the correct awards by displaying a red ‘No’ beside the member. If they do hold the correct awards, SurfGuard will display a green ‘Yes’. For a list of the award requirements, you can use the award requirements link at the bottom of the manage members page.

Click ‘Add an Individual as a Team’ to create a one person team entity — this is primarily of interest to Lifeguard Supervisors. To create a one man team, select the member’s name from the drop-down list and click Save. You can then assign times and dates to that team.

7.3. Patrol Logs

Once all your patrol teams have been set up and members and rostered times have been allocated to them, you can start entering the patrol logs for your club. This information is taken from the ‘Patrol Log Book’ which is filled out by the Patrol Team Leader whilst on patrol. For every date that a team is rostered, a log entry will appear in the ‘Patrol Logs’ screen. You may specify a date range and specify the status of the patrol in order to view a specific patrol log (see Figure 7.3.a. Patrol Logs View screen).

If you have entered all your patrol teams and the rostered patrol times for each team, then an entire list of all patrol logs for your season should be available on this screen. Use the options and date range to filter your search or display logs from other seasons.

You can print a patrol log in PDF format straight from the patrol log page or alternatively from the patrol roster page.

The printable patrol log will be pre-filled with team member information, and date and time information relating to the log. The statistics and rescue activity fields are also printed in the PDF log.

To enter information into a patrol log, use the ‘Create’ button beside the required patrol log. Once you select the ‘Create’ button, the patrol log will be displayed on your screen. SurfGuard will automatically pre-fill the log with all members of the patrol team in their respective positions. To move other members into the log, you can select from the list of members on the left and use the ‘>’ arrow button to move the member into the required position. To move a member out of a position, use the ‘<’ button. The list will show all active members registered for the current season by default. To view all active members regardless of season, you must check the box marked “Include Non-Financial Members:”. This will also list only the members in categories listed in the “Patrolling Membership Categories” sub-menu item. This area can be used to filter the list as need be.
Each member must be assigned a patrol type and if a substitute was arranged, the substitute must be moved into the substitute column.

To add a visitor to your patrol log from another club, select the ‘Add Visitor (with update)’. If you have more than 18 members involved in your log, use the ‘Next Positions (with update)’ to move to the next page of members. Using both these options will save the patrol log.

**Surfcom Patrol Logs/Stats**

When entering your patrol logs into Surfguard, you may notice some Surfcom information in the stats screen. This means that there are stats available that were radioed into Surfcom for the specific day and these can be copied into your patrol/stats log. There are two ways this can be done:

1. If your patrol teams and associated rosters have been setup in Surfguard, the stats should already be linked to your log. This means simply use the “Copy Surfcom stats to Surfguard” button to move all Surfcom stats into your patrol stats log. After this has been done, add all other stats information as required while also ensuring the details that have come from Surfcom are correct.

2. If your patrol teams and rosters have not been setup or your Surfcom has not selected the specific team during sign-on, then your Surfcom stats will not be linked to the Patrol log. Simply click the “Link Surfcom stats” button (Figure 7.3.b. below), select the Surfguard log and the Surfcom stats record for the day/time and click the “Link Stats” button (Figure 7.3.c. below). You will then be taken to the Patrol stats screen again where the Surfcom stats can be copied to your log. To do this follow the steps in point one above.

![Figure 7.3.b. Link Surfcom Stats](image-url)
Figure 7.3.c. Click Link Stats button

Once the log has been completed, click the ‘Continue’ button. This will save the patrol log into the system and display the Patrol Statistics page. All statistics during the patrol must be entered into this area.

Rescues & Demographics: For each rescue entered, SurfGuard has the ability to store incident details and demographic information relating to these rescues. Once rescues have been entered, click the “Enter/Edit Incident Details” button (highlighted in Figure 7.3.d.) to open the demographic data entry screen (Figure 7.3.e.).

Figure 7.3.d. Rescues and location of Incident/Demographic button
**Figure 7.3.e. Incident Details/Demographics entry page**

**Important:** To close the log immediately, keep the “Close log” option checked at the bottom of the patrol statistics page. If you wish to keep the patrol log open in order to make changes later, uncheck this option.

Other request actions on the Patrol Logs main page include Re-opening, Deleting or viewing the Status of the patrol log. If you request to re-open or delete a patrol log, you will be prompted to provide notes giving the reason for the request.

If left open, the Patrol Log will automatically close 21 days after the patrol log is created. If alterations or corrections to the Patrol Log are required after 21 days, the record will need to be re-opened and approved by your Branch or State Lifesaving Director.

You can add an ‘Unrostered Patrol Log’ such as a voluntary patrol, using the sub-menu option provided. To add an Unrostered Patrol, simply nominate a name, date, start and finish time and click the ‘Continue’ button to create the entry, as seen in **Figure 7.3.f. Unrostered Patrol Log screen**, below. You are then taken to the ‘Patrol Log’ screen in order to enter the members involved in the log and their hours.

**Add Unrostered Patrol Log @ Test NSW Club**

![Unrostered Patrol Log screen](image)

**Figure 7.3.f. Unrostered Patrol Log screen**

The ‘Unpatrolled Stats’ option also allows you to view and/or add details of incidents that occurred at times when no patrols were logged. As with Patrol Requests, the data available to you can be sorted by Branch, Club, Status and/or Date. A number of actions can be carried out, such as editing the record, adding a note to the record or deleting the record, via the ‘Action’ buttons.
7.4. Patrolling membership Categories

The ‘Patrolling Membership Categories’ screen is used as a member type filter for the rest of the Patrol module. The member lists that appear in all the screens in the Patrol module (such as the ‘Add Members to a Patrol Team’ screen and the ‘Patrol Log’ screen) can be controlled by selecting only the membership categories you wish to be displayed.

By doing this, you can significantly reduce the number of members that appear in the lists to make selection of members easier. (This will only delete the Membership Category from your club’s list of membership categories of patrolling members.) For example, if you remove ‘Junior Activity Member (5-13 years)’ and ‘Associate’ from the list by using the ‘delete’ link, none of the members in these two membership categories will be displayed in the member lists on all your patrol screens. Add a membership category back into the list by selecting it from the drop-down list and click the ‘Add’ button (see Figure 7.4.a.).

7.5. Other Patrol Log Features

A member can be in a number of patrol logs for the same day, however their hours cannot overlap. A member can hold more than one position within a patrol team. Even though they may appear a number of times on the log, their hours will only be credited once. A member’s patrol hours can start 2 hours before the log start time and can finish 2 hours after the log finish time.
You can add a member from another club to a patrol log by clicking the ‘Add Visitor’ button. If a patrol log contains more than 18 members then you will need to click the ‘Next (With Update)’ button to go to the next page of members. Only do this after the first page is up to date.

If you have left a patrol log in the ‘Open’ status, the patrol will automatically close after 21 days. You can only request the re-open or deletion of a patrol log once it is in the ‘Closed’ status. When you request the re-open or deletion of a patrol log, you must provide an adequate reason as to why you require this action. Branch or State approve the re-opening or deletion of all logs and will not do so if there is an unsatisfactory reason entered.

**Tips**

A ‘Close Log’ check-box is available at the bottom of the Patrol Logs Statistics screen. This will close the patrol log if it’s ticked. To keep the log open, you must un-tick this box.

If left in the open status, Patrol Logs should be updated within 21 days of the Patrol Log being entered. After 21 days the Patrol Log automatically closes.

Filter the members for Patrols by using the Patrolling Members Category feature.

Manage Patrol Teams displays the Patrol Team name. View the members of each team and other actions by clicking the ‘Edit’, ‘Delete’, ‘Members’ or ‘Roster’ link under the option ‘Actions’.

Set up a new Patrol Team by clicking the ‘Add a Patrol Team’ button on the Patrol Teams screen.

To add an ‘Unrostered Patrol’, simply nominate the name, date, start and finish time and click the continue button to create the entry.
8. Mailing Groups

8.1. Mailing Groups

The ‘Mailing Groups’ sub-menu allows you to view various sets within the database that form specific mailing groups. The mailing groups are used to sort your members into family or other groups whereby you can easily create mailing labels or report on them. There is a number of mailing group types, including ‘Board’, ‘Family’, ‘Committee’ and ‘Patrol’ groups. You can view the members of a mailing group by clicking the link. For example, the members of the ‘SurfGuard Users’ Committee are displayed below (Figure 8.1.a.). An individual committee member’s details can then be displayed by clicking their name (see below).

![Mailing Groups View](Test NSW Club)

**Figure 8.1.a.** Mailing Groups screen showing available mailing types

8.2. New Mailing Group

You can add a new Mailing Group by clicking the ‘New Mailing Group’ button or sub-menu. You can select members from the Add/Delete Mailing Group Members column by using the add (>) or remove (<) arrows. The mailing group must be given a name and a type of group selected. A primary member for the group can also be chosen.

As an example, if you were to enter a new mailing group for the Smith family. You would select Family as the group type, Smith Family as the name of the group and choose the mother or father of the smith family as the Primary member. Then the rest of the smith family would be selected using the Add/ delete members section on the right (See Figure 8.2.a.).

Click ‘Submit’ to add the Mailing Group. You can then do this for all your families within the club to have a complete list of your families, the members in them and the primary mailing member. You will also notice that your committee's and patrol teams are automatically created as mailing groups. When a patrol team is changed, those changes will automatically reflect in the mailing group’s area. For the purpose of a primary member, the Patrol Captain is selected.
8.3. Mailing Group Types

SurfGuard contains a number of established mailing group types. These can be viewed by going to the ‘Mailing Group Types’ sub-menu, as seen below in Figure 8.3.a. The different types of mailing groups can be accessed by clicking the relevant hyperlink.

To add a new mailing group type, you can click the ‘New Mailing Group Type’ button on the Mailing Group Types screen (Figure 8.3.a.). The “Mailing Group Type Add” screen can also be accessed directly via the sub-menu item ‘New Mailing Group Types’, as shown above.

This screen allows you to name a new mailing group. After clicking the ‘Submit’ button, you will be asked to confirm that you want to create this new group. You will then be able to access this group and add members to it, as described above.
Tips

View the members of a mailing group by clicking the link.

An individual member’s details are displayed by clicking their name.

The ‘Mailing Group Type Add’ screen can also be accessed directly via the sub-sub-menu item ’New Mailing Group Types.

View sets within the database via the ‘Mailing Groups’ sub-menu.

Mailing group types include ‘Board’, ‘Family’, ‘Committee’ and ‘Patrol’ groups.

Add a new Mailing Group by clicking the ‘New Mailing Group’ sub-menu.

Summary

Select members fro the new mailing group using the Add/Delete Mailing Group Members column. Use the add (>) or remove (<) arrows to compile the group list.

Add a new mailing group type by clicking the ‘New Mailing Group Type’ button on the Mailing Group Types screen. This screen allows you to name a new mailing group.
9. Messages

9.1. Messages

Messaging is used by Administrators of Entities (Clubs, Branches, or States) to send SurfGuard related messages using the system itself. This messaging system may only be used infrequently and is not intended to replace normal email.

There are two sub-menu options under ‘Messages’. These allow you to access your messages and to send new messages. The default Messages screen lists all unread messages; however, you can sort your messages using a number of options, including read, sent, draft, or archived. The sorting option is displayed in the ‘View Messages’ drop down list as seen in Figure 9.1.a.

![Default Messages screen](image)

**Figure 9.1.a. Default Messages screen**

Create messages

There are two ways to initiate a new message. You can click the ‘Create Message’ link from the default messages screen (as shown in Figure 9.1.a.), or you can click the sub-menu item on the toolbar. The screen that is displays allows you to select the message recipients from the available list. You can do this by using the add (>) or remove (<) arrows. Once you have composed your message you have the option of sending it or saving it as a draft to be sent at a later time.
**View Messages**

To view a message, click the message subject. The message will be displayed with the details of the message, including who sent it and who it was sent to.

To view all recipients of the message, click the ‘Show Recipients’ link.

A message can be forwarded as an email by clicking the “Forward as email” link. This will open the message in your email application with the subject and message content already filled out. The view message screen is shown in Figure 9.1.c.

**Figure 9.1.b. Composing a new message**

**Figure 9.1.c. View message screen Email/SMS Members**
9.2. Email/SMS Members

The email/SMS function allows for organisations to extract a list of members and then email/sms a message to selected people on the list. This will allow for reminders, information and other updates to be sent directly to people from SurfGuard.

Both the email and SMS messages are sent one way only — replies cannot be received.

For a person to receive email and SMS messages, they must have a valid email address and/or mobile phone number entered into the person details of SurfGuard. If a person does not wish to receive email/SMS communication then a checkbox, Do not send email/SMS communications, must be ticked in the persons details in Surfguard.

To send an email or SMS message

1. Select whether an email or SMS is to be sent by selecting Output Format from the dropdown list (Email is the default).
2. Use the filters to select the group of people you wish to email or SMS.
   - Ensure you select the appropriate filters so you only email or sms the group of people you want. See Figure 9.2.a. below.
3. Expand a filter by clicking the box beside the area you wish to expand, and select the field.
4. Click Display Report when all appropriate fields have been selected. A new screen will open with the results.
5. Enter the message details such as title and message.
6. Email Attachments: To attach a file to an email, click the 'Add Attachment' button and then click the Browse button and navigate to the file you wish to attach.
7. To add further attachments, click the 'Add Attachments' button again. To remove an attachment click on the Remove button.
   - Note: You can only attach files of the following types: csv, images, pdf, power point, rich text, spreadsheets, text, word documents, zip/gzip
8. Agree to the declaration in order to send an email or SMS.
   - All people searched for are returned whether they have a valid email/mobile number or not, and including those who may have opted not to receive email/SMS communication. This allows you to see those who can be sent a message and those who will not be (Figure 9.2.b.).
9. Select people from the list by ticking their box.
10. When all message recipients are selected, click Send.
Figure 9.2.a. Email filters

Figure 9.2.b. Sample email
Tips

Sort messages using the ‘View Messages’ drop-down list.

Once you have composed your message you have the option of sending it or saving it as a draft to be sent at a later time.

The two sup-menu options under ‘Messages’ allow access to incoming messages and sending new messages.

To forward a message as an email, click the “Forward as email” link.

Summary

The default ‘Messages’ screen lists all unread messages.

Message options include read, sent, draft, archived.

Click the ‘Create Message’ link from the default messages screen to initiate a new message.

Select the message recipients from the available list using the add (>) or remove (<) arrows.
10. Maintenance

10.1. Maintenance
There is only one option for Club level users under the Maintenance sub-menu being ‘Enrolment Source Companies’. Users can then access either of the two sub-sub-menu items ‘Maintain Source Companies’ or ‘Create New Source Company’.

10.2. Email notification settings
Email notifications allow clubs to be sent notification emails when certain events take place or areas of Surfguard are updated. As shown in Figure 10.2.a., to subscribe to a certain module, tick the subscribed box and enter the required email addresses. Anything that has been changed in Surfguard (such as status updates and new items requiring action) within the modules available will be sent in an email. This is a great way for officers of your organisation to be alerted of re-opened patrol logs, approved assessments, transfers requiring action, etc.

**Figure 10.2.a. Email notification settings screen**

10.3. Source Companies
Source Companies are those entities that describe where a member or course registrant comes from. To update company information, select the ‘Maintain Source Companies’ option from the menu. You can view, edit or delete records by clicking the relevant button in the Options column (see Figure 10.3.a.).
10.4. Create New Source Company

A new Source Company can be added by either clicking the ‘Create New Source Company’ button at the bottom of the Source Companies screen or via the sub-menu (see Figure 10.3.a.). The details of the new company can then be added by simply completing the fields, as shown in Figure 10.4.a.
10.5. **Background Reports/messages**

Changes can be made to all scheduled reports that are set up for your Club or Organisation through this area.

Once a report has been scheduled, the report type and selection criteria cannot be changed. Only the parameters that affect the actual scheduling of the report can be changed (such as who will receive it, when it is run and how often, etc.) (Figure 10.5.a.)

![Scheduled Background Reports/Messages View @ Test NSW Club](image)

**Figure 10.5.a.** Scheduled Background Reports/messages

10.6. **Transactions Maintenance**

Transaction types can be added to the already available list. To add new transaction types, select “New Transaction Type” while in the transaction maintenance screen. It’s important to remember that you cannot delete a transaction type once members have transactions linked to it.

**Tips**

You can view, edit or delete records on the Source Companies View screen by clicking the relevant button in the Options column.

Add a new entry by clicking the ‘Create New Source Company’ button on the Source Companies view screen or via the sub-menu.

The Source Companies feature can be used by clubs to track new member trends, etc.

**Summary**

Source companies are those entities that provide goods or services to your Club in relation to delivery of awards and other training.

Users can access either ‘Maintain Source Companies’ or ‘Create New Source Company’ via the ‘Enrolment Source Companies’ option under the maintenance sub-menu item.
11. Reports

11.1. Reports

SurfGuard provides two types of Reports — Standard Reports and Custom Reports. A list of standard reports is available from the drop-down list on the ‘Member Details Reporting’ screen. Report options include Club Contacts, Competition, Email Lists, Mailing Lists, Gear and Equipment Lists, Membership Lists, Patrol Lists, Patrol Statistics, Awards and Service Profiles. By default, all Standard reports are displayed in ‘Simple Search’ format with a simplified number of search fields. If further control over report output is required, click the ‘Advanced Search’ button to view all possible field search options.

There are also a number of output formats available from the drop-down list for each report, including HTML format (web-page look), Excel spreadsheet format, PDF, normal text format and Comma or Pipe Separated. These can be output in MS Excel or MS Word format, which will allow you to manipulate the data. Reports can also be sorted using a number of drop-down options, such as Group Type, Officer Position, Branch, Club, Status, and Membership Type etc. Some reports will run in the background of SurfGuard and can either be emailed on completion or sent as a SurfGuard message.

It is important to note that you only need to select the criteria you wish to report on and do not need to fill in every box.

To report on members in your mailing groups, or example to print a mailing labels report, you can select options from the Group type area in the reports screen. If you do not wish to report on your mailing groups then you must ensure this is left as the default selection and not changed.

A check-box is available in many reports giving the option of viewing the selection criteria used.

**Patrol Hour Reporting:** When running reports related to patrol hours, it is important to remember that a members hours are calculated as a total of all hours they have gained within the SLS organisation (All clubs/Organisations the member patrols at). To report on a members hours specific only to your organisation, the ‘Patrol Hours Specifically For Organisation:’ option should be ticked in your selection criteria (untick this option to view a members total hours across all organisations the member patrols at). You will also notice that by default, only a members Lifesaving related hours will be displayed so as to not include any hours a member may have gained as a Lifeguard.

11.2. Custom Reports

A Custom Report can also be created and saved as a template for future use. To load a saved template, go to the ‘Custom Reports’ sub-menu option and simply click the ‘Browse’ button to select the template file. To create a new custom report template click the ‘Create New Report’ button, as shown in Figure 11.2.a.
11.2. Gear and Equipment Custom Reports

Gear and Equipment reports work in the same way as the custom reports. This area is used to report on all aspects of a Club, Branch or States gear and equipment recorded in SurfGuard. To create a new Gear and Equipment custom report, follow the same procedure as described for custom reports.

When your report is output to the screen, a link will be provided to save the report for opening at a later date. You can also sort the report on each column by clicking the relevant column header.
This report now has the ability to filter by specific Gear and Equipment types.

11.4. Report Scheduling

To run reports at a specified time or on a regular basis a feature is available that allows scheduling of both standard report and custom reports. Reports can either be run once at a scheduled time or can be recurring.

The results of each scheduled report can be emailed and/or sent via SurfGuard messaging to you rather than having to export/view them from within SurfGuard.

The feature appears at the bottom of the General Reports and Custom Reports selection screens. See Figure 11.4.a, below.

**Tips**

Use the ‘Custom Reports’ sub-menu option to load a saved template. Click the ‘Browse’ Button to select the template file.

To create a new custom report template click the ‘Create New Report’ button via the ‘Custom Reports’ sub-menu option, then select the criteria that you wish the report to cover by clicking the applicable check-box or using the drop-down list.

**Summary**

There are two types of reports available: ‘Standard Reports’ & ‘Custom Reports’.

Access standard reports from the drop-down list on the ‘Member Details Reporting’ screen.

Report options include Club Contacts, Competition, Email Lists, Mailing Lists, Gear and Equipment Lists, Membership Lists, Patrol Lists, Awards and Service Profiles.

The drop-down list for each report also provides the output format options, including HTML, Excel, PDF and text formats.
Summary

Reports can be sorted using drop-down options, including Group Type, Officer Position, Status, and Membership Type.

A Custom Report can be created and saved as a template for future use.
12. SurfGuard Help

12.1. SurfGuard Help Desk

The details for the SurfGuard Help Desk are available on every screen via the ‘Help Desk’ hyperlink. By clicking the hyperlink, a new window will open up to display the Help Desk contact details, which include a toll-free phone number and email address. The Frequently Asked Questions (FAQs) can also be accessed from this page.

![SurfGuard Help Desk](image)

**Figure 12.1.a. SurfGuard Help Desk details**

12.2. Online Help

The Online help facility allows you to actively search the contents of the SurfGuard user manual online. It can be accessed by using the ‘Go to Online Help’ hyperlink within SurfGuard. You can search for a relevant topic or view the main headings within each section to navigate through to your required area.

At the end of some of the chapters a “Frequently Asked Questions” area is available to browse.

The Online help is generated from the same source as the online and hard copy PDF User Guide (see 12.3. Online PDF, on page 63). Both versions will be updated when new features are added/updated in SurfGuard. The Online User Guide has been set up to be as simple and intuitive as possible, as illustrated in **Figure 12.2.a.**
12.3. Online PDF

You can also access the PDF version of the SurfGuard User Guide from within the online help.

Click at the top right of the Help window to open the PDF version in your browser. You can save a copy on your hard drive for later reference and printing.

Tips

The SurfGuard Help Desk can be contacted on: Ph: 1300 724 006

The help desk is staffed weekdays from 9.00am to 5.00pm EST.

Email the SurfGuard help desk at — SurfGuardhelp@slsa.asn.au

Access the SurfGuard Help Desk details using the ‘Help Desk’ hyperlink.

Help Desk contact details are displayed in a new window.

The Online User Guide can be accessed by clicking the ‘Go to Online Help’ hyperlink in SurfGuard.
Part 2

SurfGuard Users — Branch/State
13. Branch/State SurfGuard Users

13.1. Branch/State Users

The details displayed in SurfGuard are dependent on your level of access. For those who have Branch or State level administrative access, a range of different sub-menu options is available. The available view on some screens will also be expanded to include all Club information within your Branch or State.

13.2. Edit Members

Where a person belongs to more than one organisation within a branch/state, all the person's memberships are listed in a simple, easy to view membership section. A button is available next to each organisation to open the details and view/edit as required (Figure 13.2.a.).

13.3. Assessments

Generally, only members who are not in another incomplete assessment request will be listed as the available members for assessment. Age restrictions and pre-requisites are implemented; hence, minimum and maximum ages are as of 30 September of the current registration season or as of the current date if past 30 September. Proficiency numbers are no longer required.

The following Assessment rules or definitions apply in SurfGuard.

- **Manual Award Number**: This is a manual number that the state can allocate to a member for an award. It will appear in the engravers report and certificate.
- **Proficiency Type**: Only members who hold the award will be listed in the available members.
- **All Other Assessment Types**: Only members who do not hold the award will be listed in the available member's.

Branches and States can Archive Assessments. To archive complete assessments if you are a State, select 'Exam Complete' Status and 'All' Assessment Types. To archive complete assessments if you are a Branch (or Club), select 'Exam Complete' Status
and ‘Proficiency’ Assessment Type. To archive rejected assessments, select ‘Exam Rejected’ Status. A button ‘Archive’ will appear. When clicked, it will archive the currently displayed assessment request.

It should be noted that only States can archive Award assessments, as they need to do extra processing upon completion (such as printing of certificates).

13.4. Transfers

The following Transfer rules or definitions apply in SurfGuard.

- **Endorsed Transfer**: Has been Endorsed and is waiting for Branch or State to Approve it.
- **Approved Transfer**: Has been approved by state or branch and is ready for the winning club to complete it. When the winning club hits the ‘Complete’ link, this is when the transfer actually occurs and the member gets transferred.
- **Rejected**: This means that the transfer has been rejected by the branch/state user.
- **Not Endorsed**: The transfer has not been endorsed by the losing club. However, the transfer can still be approved by the branch/state.

**Important!**

If a Branch/State approves a Not Endorsed transfer, they are overriding the decision of the Club and, in effect, endorsing the transfer on behalf of the Club. To carry out the wishes of the Club, the Branch/State should reject the transfer.

13.5. Patrols

A key role of Branches and States is to manage patrols, and there are a number of options under the ‘Patrols’ menu item that allow you to do this. For States, ‘Set-up Patrol Positions’ and ‘Add Patrol Positions’ allow you to select or manage the qualifications profile of those members who form part of a patrol team. When adding a Patrol Position, you can nominate a number of awards, which are sorted based on award type, as either mandatory or optional (see Figure 13.5.a. Add Patrol Position screen).

As patrol positions are different for Clubs/Support Operations and Lifeguards, you will see an option when adding/editing a patrol position to choose the ‘Position Type’. This will enable states to determine whether the position is specific to Lifesaving (Clubs and Support Operations) or Lifeguards. For example, in most cases there would be 3 Lifeguard positions set up for Supervisor, Senior Lifeguard and Lifeguard that are specific to Lifeguard Beaches and Pools, whereas Clubs and Support operations would have the standard positions such as Patrol Captain, Vice Captain, IRB Driver etc.

The ‘Authorise Requests’ option allows you to authorise changes to Patrol Logs made by Clubs. This screen has a number of options and allows you to sort data by Branch, Club, Action Types, Request Types and/or Status Types. Authorise Requests by clicking the ‘Accept’ or ‘Reject’ buttons in the ‘Actions’ column for the relevant Patrol Log entry. You will be required to notate a reason for rejecting or accepting the requested action before continuing.
A new listing can also be added via the ‘Add Un-patrolled Stats’ button. This will open a new screen, on which you can enter details that pertain to a certain date. Details include time and number of rescues performed, beach attendance, first aid required, tide information and weather conditions.

13.6. Mailing Groups and Reports

Mailing Groups and Reports can be used by Branches and State committees. When creating a Mailing Group or Report, only the member Clubs and individuals of your Branch/State are available to you. Member information can be sorted by Club and then by all the other categories within the Club, as shown in Figure 13.6.a. State level reporting screen.
13.7. Maintenance

You can Allocate Awards to members using the ‘Awards Allocations’ submenu. This allows you to search for a member using their name or membership identification number. You can then use the drop-down options to enter all relevant information including their club name and the details of the award, as seen in Figure 13.7.a. Allocating an Award to a Member, below.
Tips

Some actions taken by branches and/or states may overwrite entries made by Clubs.

Only states have the authority to archive Award assessments.

Displayed details are based on level of access.

Summary

For those who have branch or state level administrative access, a range of different sub-menu options is available.

The available view on most screens is expanded to include all club information within your branch or state.
Part 3

SurfGuard Users — National
14. National SurfGuard Users

14.1. National Users

The details displayed in SurfGuard are dependent on your level of access. For those who have National level administrative access, a range of different sub-menu options is available. The available view on some screens will also be expanded to include all Club information, and allow you to sort information by Club, Branch, State or National sets.

14.2. Organisational Management

The ‘Organisational Management’ area allows you to undertake a number of functions, including defining and managing equipment. The ‘Manage Gear and Equipment’ option allows you to view a listing of all equipment held by the organisation. You can update stock details and add new items by clicking the ‘Manage’ button and following the prompts on the relevant sequence of screens.

The ‘Define Gear and Equipment’ and ‘Define Gear and Equipment Attributes’ options allow you to name, describe and assign attributes to new equipment brought into service by any entity of SLSA (see Figure 14.2.a, New Gear and Equipment screen).

![Gear & Equipment Definition @ Surf Life Saving Australia](image.png)

**Figure 14.2.a.** New Gear and Equipment screen

14.3. Maintenance

The Maintenance area of SurfGuard contains three sub-menu items available to National level users, these being: ‘Award Allocations’, ‘Award Maintenance’ and ‘Enrolment Source Companies’. Each of these areas has sub-sub-menu items from which you can make a selection.

You can Allocate Awards to members using the ‘Awards Allocations’ sub-menu. This allows you to search for a member using their name or membership identification number. You can then use the drop-down options to enter all relevant information including their club name and the details of the award, as seen in Figure 14.3.a, Allocating an Award to a Member, below.
Figure 14.3.a. Allocating an Award to a Member

Award prices can be allocated using the ‘Awards Maintenance’ sub-menu option. By using the available drop-down lists, you can select specific awards as they relate to status and award type. You also have a number of administrative options from the ‘Award Prices’ screen, including setting a new price for an award, viewing the award pricing details, editing these details or deleting the award. The Awards Maintenance options are illustrated at Figure 14.3.b. Awards Prices view under the Awards Maintenance sub-menu.
Two maintenance options are available under the Enrolment Source Companies sub-menu. The ‘Source Companies View’ screen lists all companies that provide services or goods to your club. You can view the company’s full details by clicking the ‘View’ button (see Figure 14.3.c. Source Companies view). Other options include ‘Edit’ and ‘Delete’. You can also enter a new company from this screen by clicking the ‘Create New Source Company’ button, as illustrated at Figure 14.3.d. Adding a new Source Company.
The ‘Organisational Management’ area allows you to define and manage equipment. The ‘Define Gear and Equipment’ and ‘Define Gear and Equipment Attributes’ options allow you to name, describe, and assign the attributes to new equipment.

Allocate Awards to members using ‘Awards Allocations’ sub-menu, then search for a member using their name or membership identification number.

### Summary

Allocate award prices via the ‘Awards Maintenance’ sub-menu option.

Use the drop-down lists to select specific awards as they relate to membership status and award type.

The details displayed in SurfGuard are dependent on your level of access.

For those who have National level administrative access, a range of different sub-menu options is available.

The available view on some screens is expanded to include all Club information and allows you to sort this information by Club, Branch, State or National sets.
15. SurfGuard Administration

15.1. User Administration

The ‘User Admin’ function is located beneath the Banner in the Login Details area of your SurfGuard screen. All members have access to their own membership details via the ‘Current User’ menu item. You can change your contact details or password using this feature.

Certain users have been granted administrator rights within SurfGuard, as indicated by the option being available to you once you have logged on. The details displayed to you as an administrator are dependent on your level of access. If you believe you require higher User Admin access at Club, Branch, State and/or National level, contact the Help Desk.

15.2. Groups

The ‘Groups’ option allows you to manage the permissions groups that fall within your access level. Groups are listed by Name and can be sorted based on the Environment and Application to which they relate. For example, the SLSA Memberships Group has access to the Production environment and Membership application. This means that the data is live (as opposed to the playpen) and drawn from the membership database (see Figure 15.2.a. Groups).

A number of actions are accessible from this screen. The ‘Edit’ button allows you to change certain information about the group — such as the name. Specific details about the group can be accessed via the ‘View’ button. The ‘Permissions’ button features a list of the different types of areas within SurfGuard that the group can access. Using this function, as an administrator you can assign read, write, update, delete and grant permissions to the group for all areas within SurfGuard.

15.3. Users

The ‘Users’ option allows you to access and update users of the system. You can also add a new user via this menu option. To add a new user, you must ensure that all mandatory fields are completed. These are indicated by an asterisk. A number of drop-down menus and tick boxes are also available. Usually, a user’s Main Organisation will be the organisation that they will be using the most within SurfGuard. A user can have access to other organisations as well by selecting them in the ‘Available Organisations’ area. A new user must also be assigned permissions to a number of Groups by selecting from the available list. The groups set up previously
will determine the access rights that the user has within SurfGuard (see Figure 15.3.a, User Administration — New User).

Once a new user has been created, they will be sent an email to inform them that they must change their password the first time they log on. (This email is assigned under the drop-down option entitled ‘Email Template’ and can also be accessed via the menu item list). A user remains ‘active’ from the time they first log in to SurfGuard. If your account has not been accessed for over three months, you will need to contact the Help Desk to have your account reactivated.

Figure 15.3.a. User Administration — New User

We can see if figure 15.2 that the new member has main access to the Avoca Beach organisation however they also have access to a number of other clubs listed in the Available organisations in the bottom right. The member is assigned to 2 permissions groups, SLSA Memberships, giving full access to SurfGuard at a National Level, and also SLSA Maintain Current User, which enables the user to update their login details and password. By selecting the Force password change check-box, the user will be forced to change their password when they login for the first time. By selecting the Send Email check-box, An email will also be sent to the user containing their login details.

15.4. Maintenance

The ‘Maintenance’ option allows an administrator to access options for organisational management. This option allows the name and type of organisation to be selected for which the admin user wishes to select or edit New Organisations can also be added via this menu item (see Figure 15.4.a, User Admin — Add Organisation view).
Add Organisation @ Surf Life Saving Australia

Figure 15.4.a. User Admin — Add Organisation view

Tips
The ‘Groups’ option allows you to sort and search by group. Groups are listed by Name and can be sorted based on the Environment and Application to which they relate.

New Organisations can also be added via the maintenance menu item.

You can change your contact details or password via the ‘Current User’ menu item

Summary
The ‘User Admin’ Function is located beneath the Banner in the Login Details area of your SurfGuard screen.

The details displayed to you as an administrator are dependent on your level of access.

If you require higher User Admin access contact the Help Desk
Part 4
Lifeguards — Councils/Beaches
16. Lifeguards

16.1. Overview

The Lifeguards module has been developed to assist Lifeguard managers in organising and tracking Lifeguard services. In its initial stages, the Lifeguard Councils, Shires, Beaches and Pools will be managed by users with State level access. Lifeguard entities resemble the traditional SurfGuard layout however there are a number of changes to permissions and functionality specific to managing Lifeguard services in SurfGuard. The hierarchy for lifeguard entities follow the same guidelines as traditional clubs and branches. Pools and Beaches are classed as Clubs in addition to Councils and Shires being classed asBranches.

16.2. Summary

Due to lifeguards often patrolling at multiple beaches within a council, summaries for membership category that are run at a branch/council, state and national level will only count a lifeguard once per council that they belong to.

16.3. Organisational Details

Organisational Details contain all information relating to the Service that has been set up, like addresses, contacts, ABN, Bank Details and GPS reference data etc. If filled out (fully) it can be used as a means of obtaining details for mail-outs, lists and other information usually collected at the start of the season on a form. This information is also used throughout the whole Organisation and will be used for displaying on the SLSA website.

For each lifeguard beach, Service Profiles should also be filled out.

Councils and Beaches may wish to use the Org Management/Gear and Equipment area to:

- Keep track of essential gear in use and its age
- Maintenance of IRB Registration information
- Keep track of the quantity and type of gear
- Check on the make and model of equipment
- Check on the Warranty details of gear
- Councils should enter their own Gear for the above purposes
- Councils can see what gear is held at Beaches to see if Sponsorship of grants should be targeted or arranged for specific items
- Allows entities to calculate the costs around gear and equipment for grants and sponsorships.

16.4. Adding statistics for reports

So that each Lifeguard service can efficiently and correctly compare activities as part of their reporting requirement, it is important that base line statistics are entered into SurfGuard.

To enter these statistics use the Patrols/Unpatrolled Stats screen. This data is then used to compile the statistical reports found under the Reports menu. The report type 'Patrolled and/or Unpatrolled Stats Comparison' compiles graphs to compare the data on a monthly or yearly (either yearly calendar or patrol season) basis. You may
choose from 2 to 5 months/years to compare. The report may be output to view as html or a PDF.

16.5. Members

When adding a member into a Lifeguard entity it is possible to add the member to one Beach/Pool or enter them into an entire Lifeguard Council. Adding a member to a Council means they become a member of every beach/pool that falls under the Council. To add members to a council, tick the check-box marked “Council” and select the relevant Council (see Figure 16.5.a. Adding new Members to a Lifeguard Council).

Figure 16.5.a. Adding new Members to a Lifeguard Council

If adding a member to a single organisation you must ensure the “Single Organisation” check-box is ticked. This will list all available SLSA Clubs and Lifeguard Beaches/Pools. Selecting “Council” will only list available Lifeguard Councils.

If someone is already a member of a lifeguard service or SLSA club, you can add this person to an alternative lifeguard beach or council without requiring a transfer. Select the “Add Member” link in the Members sub-menu and enter the person’s first name, last name, date of birth and gender. Once you have completed this click the “Check for Duplicate” button, this will search the SurfGuard database for the member. If the member is found, a message will appear asking if you would like the member to become part of the lifeguard beach (see Figure 16.5.b. Adding Members from other Organisations). By selecting OK, SurfGuard will then automatically add the member to the organisation without removing them from their original beach or club. This also works in reverse when members are added into clubs however already hold membership at a lifeguard beach.

Figure 16.5.b. Adding Members from other Organisations

When Activating members through “Bulk Processing” in the Members menu item, SurfGuard will automatically register all selected members for the current season.
A script is run on the first day of every season (1st July for the given year) in which all active members are automatically registered for the current season. If a member in your organisation will not be renewing for the next season they must be archived immediately so that you efficiently manage the pool of active Lifeguards.

Lifeguard entities consist of 6 membership categories that a member can be associated with:

- Trainee Lifeguard
- Casual Lifeguard
- Part-Time Lifeguard
- Full-Time Lifeguard
- Senior Lifeguard
- Lifeguard Supervisor

16.6. Assessments

The Assessments menu allows users to view current or past assessments or to enter new assessment information. Users can only add, edit and view information for which they have access.

By clicking the sub-menu item ‘New Assessment Request’, you can create a new assessment record. You can select assessment specifics by choosing from the various drop-down options. Select from available candidates by clicking a name and using the add arrow (>).

Only members who are not in another incomplete assessment request will be listed as the available candidates for a new assessment. Age restrictions and pre-requisites are implemented; hence, minimum and maximum ages are as of 30 September of the current registration season or as of the current date if past 30 September. To check age requirements and pre-requisites, run the “Reference: Awards” report in the reports area.

Some awards now require the entering of pool or activity times. These fields are available against their respective awards and this information can be input during the “process results” stage of an assessment (see Figure 16.6.a. Processing results for an Assessment). As all results must be approved, the results of pool/activity times and pass/fail information can also be edited by the Council level administrator during the “Awaiting Candidate Approval” stage.
Figure 16.6.a. Processing results for an Assessment

(Note that this is an example, and that a Bronze Medallion may not require times to be entered.)

Figure 16.6.a. Processing results for an Assessment, above, shows an example for entering Pool and Activity times. If an award requires a time to be input, the option will be available beside the relevant award. In this case, The Bronze Medallion award is asking for a Pool time and Activity time. The example shows the Pool time entered as 12 minutes 34 seconds and the Activity time as 1 hour 24 minutes and 6 seconds.

For Proficiency assessments, once the assessment is approved by your Council or State, the members' award will be updated with the new proficiency information. Please note that only members who hold the award will be listed in the available members.

16.7. Transfers

Although the Transfers menu item may be available, all Lifeguard entities are unable to access this area of SurfGuard and cannot initiate or process transfers. See 16.5. Members, on page 80 for information specific to transferring the membership of lifeguards.

16.8. Patrols

A key role of Beaches, Councils and States is to manage patrol specific information, and there are a number of options under the 'Patrols' menu item that allow you to do this. Councils and States now have access to areas such as patrol teams (see Figure 16.8.a. Manage Patrol Team screen (NSW State Level)), patrol logs and patrol statistics. This information can be viewed for only the Beaches that fall under your Council or State. For Beaches and Pools, the patrol menu items will only be specific to your single organization.
At a Council and State level, the ‘Authorise Requests’ option allows you to authorise changes to Patrol Logs that need to be made by Beaches. This screen has a number of options and allows you to sort data by Council, Beach, Action Types, Request Types and/or Status Types. Authorise Requests by clicking the ‘Accept’ or ‘Reject’ buttons in the ‘Actions’ column for the relevant Patrol Log entry. You will be required to notate a reason for rejecting or accepting the requested action before continuing.

A new listing can be added via the ‘Add Unpatrolled Stats’ button. This will open a new screen, on which you can enter details that pertaining to a certain date. This differs slightly from the Statistics that are entered for specific patrol logs as the unpatrolled stats are details of incidents in which a patrol was not rostered for the time or date. Details include time and number of rescues performed, beach attendance, first aid required, tide information and weather conditions (see Figure 16.8.b. Add Unpatrolled Stats screen).
The above example (Figure 16.8.b. Add Unpatrolled Stats screen) is only a small selection of the Unpatrolled Stats page, but this shows clearly some of the fields required and selections available for choosing beaches, if logging the stats at a Council or State level.

For each rescue entered, Surfguard has the ability to store incident details and demographic information relating to these rescues. Once rescues have been entered, click the "Enter/Edit Incident Details" button (highlighted in Figure 16.8.b. Add Unpatrolled Stats screen) to open the demographic data entry screen (for a view of the screen refer to the 'Surfguard Users Clubs' chapter and Figure 7.3.e. Incident Details/Demographics entry page in the Patrols section).

Patrol Logs and Unrostered patrol logs can be accessed through the “Patrol Logs” sub-menu item in the ‘Patrols’ menu. To create a patrol log, there must be at least one patrol team set up for the specified club and the team must have members assigned to and a roster for the season. For each team that has a rostered patrol, a patrol log will be listed in the “Patrol logs” screen. To enter the details for a patrol, you must click the “Create” button relating to your patrol log. This will bring up the patrol log screen and prefill the positions with the members of the patrol team associated with the log. If adding an unrostered patrol log (see Figure 16.8.c. Add Unrostered Patrol screen), the positions will be left blank and a list of members on the left is available for positioning into the log. The members listed on the left are returned from all the membership types the organisation has selected in the “Patrolling Membership Categories” sub-menu item.
16.9. Reports

Reports are used by Beaches, Councils and States to output valuable information from SurfGuard. The two report options available include standard, pre-formatted reports in the “Reports” sub-menu item and “custom Reports”, which can be custom built depending on the user requirements. There are a great number of standard reports available and these include some very specific reports that cannot be built in the custom reporting tool. An essential report available for lifeguards is the “Patrolled and/or Unpatrolled stats comparison” report. This report lists the beach statistics and compares it to previous statistics for the month, calendar year or patrol season. The user can determine how many periods to report on, for example the last 3 years, or the last 4 January’s. A small example can be seen in Figure 16.9.a. State Level Statistics Comparison reporting screen.

**Patrol Hour Reporting:** When running reports related to Lifeguard hours, it is important to remember that a lifeguard’s hours are calculated as a total of all hours they have gained within the SLS organisation (all clubs/Lifeguard Services/Organisations the member patrols at). To report on a member’s hours specific only to their Lifeguarding, the ‘Organisation Hours Type’ option should be set to ‘Lifeguard Hours’. This will only report on the person’s lifeguard hours so as to not include any hours they may have gained within a Club or as a Volunteer.

**Tips**

Reports are used by Beaches, Councils and States to output valuable information from. Some actions taken by Councils and/or States may overwrite entries made by Beaches. Only States have the authority to archive Award assessments.
Summary

Displayed details are based on level of access.
For those who have Council or State level administrative access, a range of different
sub-menu options is available.
The available view on most screens is expanded to include all Club information within
your Council or State.
Part 5

Incident Reporting Database (IRD)
17. IRD

17.1. About Incident Reporting

Incident reporting represents the recording of drowning, rescues, first aid etc, must occur at club level, as near as possible in timing to the occurrence of the incident, and this is currently done using a paper Incident Report Form. Previously this data was then entered into a Microsoft Access database at state centre and exported to the national office. SLSA have now developed a fully web-based system that will replace the current Microsoft Access IRD, and that conforms to the guidelines of SLSA's IT Strategic Plan. It is accessible by clubs, branches and other services, on any computer that has internet access and browser software (such as Internet Explorer or Netscape Navigator).

The following incidents need to be entered into the IRD:

- Drowning
- Near Drowning
- Resuscitation
- Member Injury
- Employee Injury
- Major First Aid (Spinal etc.)

Note that this is only SLSA's minimum requirement for data entry and some states may have additional mandatory requirements — check with your state centre if you're not sure. Data for other incident types is optional, but we strongly encourage the entry of all incidents, to give us the best possible dataset. Very minor incidents (minor first aid etc) are not required to be entered; however you can enter them if you choose. States and branches should also pay special attention to entering all incidents resulting from their local carnivals, as well as state and branch championships.

The data entered is based upon the SLSA Incident report form (SLSA F161) which can be found at:

17.2. About IRD

IRD is a mySQL relational database integrated with SurfGuard to allow Users access to the IRD either via a viewable screen via a web browser or via output using the reporting function.

The database has been created using the core information from the original spreadsheets, along with additional fields and information.

**Incident Summary**

<table>
<thead>
<tr>
<th>Incident Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unique Incidents (including Unknown Clubs)</td>
<td>467</td>
</tr>
<tr>
<td>Unique Incidents (excluding Unknown Clubs)</td>
<td>307</td>
</tr>
<tr>
<td>Major First Aid</td>
<td>61</td>
</tr>
<tr>
<td>Minor First Aid</td>
<td>101</td>
</tr>
<tr>
<td>Major Rescue</td>
<td>16</td>
</tr>
<tr>
<td>S &amp; R</td>
<td>1</td>
</tr>
<tr>
<td>Member Injury</td>
<td>31</td>
</tr>
<tr>
<td>Canine Incident</td>
<td>31</td>
</tr>
<tr>
<td>Consistent</td>
<td>4</td>
</tr>
<tr>
<td>Drowning</td>
<td>7</td>
</tr>
<tr>
<td>Near Drowning</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>35</td>
</tr>
</tbody>
</table>

**Figure 17.2.a.** IRD after logging in
17.3. Registration Information

Before attempting to login to IRD, you must have a User Account set up on your behalf. This is done by completing the SLSA form 49 located on the SLSA Admin and Resources/Form/Lifesaving area and circle IRD into the text area of the system you require:

Once you have logged on to SurfGuard, change the database name to IRD by selecting it from the Application list (see below).

![Switching to IRD](image)

17.4. Security

Several layers of security have been set up in IRD. Users can have either Browse, Edit or Administration rights as well as access to data on a State by State level.

17.5. Data integrity

All data held within IRD has been collected over nearly 10 years and it is vital that the integrity of the data should be maintained. All data being entered or revised should be checked for accuracy before it is entered.

All data held within the IRD is owned by SLSA. No data, image or map should be passed on to a third party for research or commercial use without the permission of the SLSA Lifesaving Manager.

17.6. Incident Reports

The incident reports menu item allows the user to pre-select what fields are viewed in the browse and incident area of the IRD. The display category area allows the user to select the columns and order of the selected items.
17.7. **Add Incident**

The add incident area allows the user to input the required fields by following the order of the paper based Incident Report. Those fields marked with a red * are mandatory.
For incidents where resuscitation was required, the CPR/Oxygen/Defib options must be chosen when completing the 'Initial Treatment' area. This is necessary to allow you to complete the CPR/Oxygen report form (Figure 17.7.b.).
17.8. Find Incident

The user can locate an incident by entering the required information into the relevant area of the find an incident screen. Enter the Club or Service, incident type or date range and the database will search for the correct response. Searched are restricted by State.

![Find an Incident screen](image1)

**Figure 17.8.a. Find an Incident screen**

17.9. Browse Incidents

The Browse Incidents area displays the criteria based upon the entries made in the Incidents report area.

![Browse Incidents](image2)

**Figure 17.9.a. Browse Incidents**
Tips
Browse through the screens first.
Users should know how to navigate around SurfGuard prior to using IRD.

Summary
See above
Part 6

ASBAMP Online
18. ABSAMP

18.1. About the “Australian Beach Safety & Management Program” (ABSAMP)

The Australian Beach Safety & Management Program (ABSAMP) was established in 1990 as a joint program between SLSA and the Coastal Studies Unit, University of Sydney.

ABSAMP is an ambitious project that aims to be the most comprehensive study ever undertaken on the beaches of any part of the world’s coast. Detailed information on every beach in Australia has been amassed.

The main aims of the program are to:

- Develop a comprehensive, standardised and scientific information base on all Australian beaches with regard to their location, physical characteristics, access, facilities, usage, rescues, physical and biological hazards, and level of public risk under various wave, tide and weather conditions.
- Expand and improve the management and safety services of all Australian beaches, and to assist other countries to develop similar programs.

Data on each beach is acquired from a range of interrelated sources: topographic maps and aerial photographs, aerial and ground site inspections, beach conditions (produced on a daily basis by patrolling surf lifesavers filling in beach maps) and published data. All information is filed as a hard copy and all appropriate information then extracted for entry into the database.

18.2. About ABSAMP online

ABSAMP online is a Postgre SQL Database integrated with SurfGuard to allow Users access to the beach information either via a viewable screen via a web browser or via output using the reporting function.

The database has been created using the core information from the original MS Access database along with additional fields and information.

The data is set up as the beach as the central hub and all other information attached to it. Each beach has a unique key identifier as have all of the attached features.
18.3. Registration Information

Before attempting to login to ABSAMP online, you must have a User Account set up on your behalf. This is done by completing the SLSA form 49 located on the SLSA Admin and Resources / Form / Lifesaving area and write ABSAMP into the text area of the system you require:

Once you have logged on to SurfGuard, change the database name to ABSAMP by selecting it from the Application list (see below).

Figure 18.2.a. ABSAMP online information

Figure 18.3.a. Switching to ABSAMP
18.4. Security
Several layers of security have been set up in ABSAMP. Users can have either Browse, Edit or Administration rights as well as access to data on a State by State level. All access to ABSAMP will need to be approved by the SLSA Coastsafe manager.

18.5. Data integrity
All data held within ABSAMP has been collected over nearly 20 years and it is vital that the integrity of the data should be maintained. All data being entered or revised should be checked for accuracy before it is entered. No data should be deleted without the approval of the Coastsafe Manager.

All data held within the ABSAMP database is owned by SLSA. No data, image or map should be passed on to a third party for research or commercial use without the permission of the Coastsafe Manager.

18.6. Data Access Policy

Responsibility
It is the responsibility of SLSA, through the National Manager Coastal Safety Services, to implement and maintain procedures to effectively manage and provide necessary access to ABSAMP Data, while at the same time ensuring the confidentiality, integrity, availability, accountability, and auditability of the information.

Use
Any individual granted access to ABSAMP Data is responsible for the ethical usage of that data. It will be used only in accordance with the authority delegated to the individual to conduct SLSA operations.

Data Access
The Responsible Officers will coordinate ABSAMP Data access nationally and for each SLSA State/Territory. The Responsible Officers will maintain records of Approved ABSAMP Data Users, and serve as contact point for ABSAMP enquiries.

Compliance:
Approved ABSAMP Data Users are expected to observe any restrictions that apply to sensitive data; and to abide by applicable laws, policies, procedures and guidelines with respect to access, use, or disclosure of information.

The unauthorized storage, disclosure or distribution of ABSAMP Data in any medium, except as required by an employee's job responsibilities is expressly forbidden, as is the access or use of any ABSAMP Data for one's own personal gain or profit, for the personal gain or profit of others, or to satisfy one's personal curiosity or that of others.

18.7. Maintenance Function — General
The maintenance functions are managed via the ‘maintenance’ menu. From this menu the parameters relating to a field or a filed can be added, changed or removed.
18.8. Attribute values

Attribute values allow the Administrator to add a new attribute and to sequence the attribute (order) so that it appears on the screen in the correct place. Click the ‘Modify’ button to change the sequence of an attribute.

![Attribute Values maintenance screen](image)

18.9. Attribute Listing

The attribute listing generates a report that lists all fields and their attributes. To create the report click the generate button. The output will show the list of attributes for each area of ABSAMP.
18.10. Beach Barrier

The Beach Barrier maintenance screen allows a user to Find, delete or add a new barrier and to change the characteristic of a barrier type. Click the relevant button to perform this task.

18.11. Beach Drainage

The beach Drainage maintenance allows a user to Find, Delete or Create a beach drainage attribute for a particular key. Click the relevant button to use this functionality.
18.12. Import Maps

This feature will allow the user to import a map as an image into ABSAMP and connect it to a particular beach. To perform this function, enter the map reference information and the map type. Click the Browse button and browse to where the file location of the map is stored and select it. The map image should appear once the map has been uploaded.
18.13. Import Photos

Photos can be imported using the Import Photos function under the maintenance menu.
18.14. Beach Summaries

The beach summary maintenance area will allow the user to display, update, delete and create summary descriptions. Click the appropriate box to achieve this. These summaries relate to swimming, surfing, fishing and general.

![ABSAMP Summaries Sets Maintenance](image)

**Figure 18.14.a.** Beach Summaries maintenance screen

18.15. Beach Description

The beach description maintenance area will allow the user to display, update, delete and create beach descriptions. Click the appropriate box to achieve this.
18.16. Beaches

The beaches area of ABSAMP is where all detail is held on a particular beach.

To search for beach information delete the beach key and beach name and enter your known information. This information will be reused when you click other beaches functions.

Note: When adding a new beach you will need to create the beach and then in the MAINTENANCE area create the summaries, carparks and other features and attach them to this beach.
A table below summarises the information held in each beach area of ABSAMP:

<table>
<thead>
<tr>
<th>Beaches item</th>
<th>Fields Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Details</td>
<td>Description, Public transport, Measurements, Lat and Long, Hazards, Reefs, Attaching summaries</td>
</tr>
<tr>
<td>Relative Locations</td>
<td>Location type, name, distance</td>
</tr>
<tr>
<td>Facilities</td>
<td>Type, number, distance comments</td>
</tr>
<tr>
<td>Hazards</td>
<td>Type, location, Lat/Long, Risk, comments</td>
</tr>
<tr>
<td>Signage</td>
<td>Type, location, symbol, hazard, lat/long</td>
</tr>
<tr>
<td>Structures</td>
<td>Type, details, manager</td>
</tr>
<tr>
<td>Features</td>
<td>Type, location, details</td>
</tr>
<tr>
<td>Activities</td>
<td>Type, clashes with</td>
</tr>
<tr>
<td>Regulations</td>
<td>List of applicable regulations</td>
</tr>
<tr>
<td>Biological Hazards</td>
<td>Type, season, comments, control</td>
</tr>
<tr>
<td>Vulnerable Biota</td>
<td>Type, evidence, counts, comments</td>
</tr>
<tr>
<td>Rips</td>
<td>Type, number, spacing</td>
</tr>
<tr>
<td>Reefs</td>
<td>Type, location, width</td>
</tr>
</tbody>
</table>
### 18.17. Exports

The export function allows users to select any number of combinations of fields and export them as a variety of outputs.

Each area is expandable by clicking the relevant button as shown below.

Name the report and once the export file is created, select the location where it is to be saved.

**Note:** Permission must be sought before any exported information is used by any person other than SLSA staff.

Expanded data fields are shown in Figure 18.17.a. to Figure 18.17.f. Exports fields, below.

<table>
<thead>
<tr>
<th>Beaches item</th>
<th>Fields Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carparks</td>
<td>Type, name, distance, visible</td>
</tr>
<tr>
<td>Access Paths</td>
<td>Type, location, start and end lat/long, hazards, access types, distance</td>
</tr>
<tr>
<td>Barriers</td>
<td>Type</td>
</tr>
<tr>
<td>Sediment Samples</td>
<td>Type, location, sample, distance, lat/long, position, gradient, comments</td>
</tr>
<tr>
<td>Drainage</td>
<td>Type, crossing location</td>
</tr>
<tr>
<td>Zoning</td>
<td>Type, name, manager</td>
</tr>
<tr>
<td>States</td>
<td>Type, tide, locations</td>
</tr>
<tr>
<td>Emergency Services</td>
<td>Type, distance, response time</td>
</tr>
<tr>
<td>Lifesaving Services</td>
<td>Type, provider, manager</td>
</tr>
<tr>
<td>Risk Factors</td>
<td>Visitation, Lifesaving services</td>
</tr>
</tbody>
</table>

**Figure 18.17.a.** to **Figure 18.17.f.** Exports fields, below.
Custom Exports

Figure 18.17.a.

Custom Exports

Figure 18.17.b.
## Custom Exports

### Figure 18.17.c.

<table>
<thead>
<tr>
<th>Select Order</th>
<th>Column Header</th>
<th>Selection Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include Column?</td>
<td>Basic Beach Details</td>
<td>Fields Selected</td>
</tr>
<tr>
<td>Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Council</td>
<td>Facility</td>
<td>Select Facility</td>
</tr>
<tr>
<td></td>
<td>Structure</td>
<td>Select Structure</td>
</tr>
<tr>
<td></td>
<td>Regulation</td>
<td>Select Regulation</td>
</tr>
<tr>
<td></td>
<td>Public Transport</td>
<td>Select Public Transport</td>
</tr>
<tr>
<td></td>
<td>Activity</td>
<td>Select Activity</td>
</tr>
<tr>
<td>Geography</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hazards &amp; Risks</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Figure 18.17.d.

<table>
<thead>
<tr>
<th>Select Order</th>
<th>Column Header</th>
<th>Selection Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include Column?</td>
<td>Basic Beach Details</td>
<td>Fields Selected</td>
</tr>
<tr>
<td>Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Council</td>
<td>Facility</td>
<td>Select Facility</td>
</tr>
<tr>
<td></td>
<td>Structure</td>
<td>Select Structure</td>
</tr>
<tr>
<td></td>
<td>Regulation</td>
<td>Select Regulation</td>
</tr>
<tr>
<td></td>
<td>Public Transport</td>
<td>Select Public Transport</td>
</tr>
<tr>
<td></td>
<td>Activity</td>
<td>Select Activity</td>
</tr>
<tr>
<td>Geography</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Environment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hazards &amp; Risks</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
18.18. Reports

The reports area allows users to run a series of pre-setup reports and display them to a screen for printing. **Figure 18.18.a. Reports selection** shows the list of reports.
**Figure 18.18.a.** Reports selection

**Tips**

Browse through the screens first.

Users should know how to navigate around SurfGuard prior to using ABSAMP.

**Summary**

See above.
Part 7

Annexes
19. Forms

Click the link below to open the form in a browser window. You can then print it or save it to your hard drive for later use.

A — IT Systems access request form (SLSA F049)
Part 8

Glossary
20. Terms and definitions

Archived
The assessment is complete and all administrative reporting is also complete.

Authorise Patrol Log Request
A sub-menu option that allows you to view and action any pending Patrol Log requests. This includes re-opening requests and deleting requests. You can also request a status of Waiting. Accepted, Rejected or Cancelled.

Award
Upon the successful completion of an assessment, the member is allocated a new award.

Awaiting Approval
The assessment has been submitted for approval by branch or state. This step is skipped for proficiencies.

Awaiting Candidate Approval
The results have been entered for the members. Branch or state needs to approve the results and may also amend any of the results. A Proficiency assessment is completed once this stage has been actioned.

Award Number
Branch or state has approved the member results. State needs to allocate the awards. They may input manual award allocation numbers at this stage. This step is skipped for proficiencies.

Button
An interface icon that allows a user to access a specific action.

Check-box
An interface icon that allows a user to turn on or off a specific feature by clicking a square or box. The feature is active when a tick appears within the square.

Credit Transfer
The member is allocated new award(s) but does not have to actually sit an assessment since they already did the assessment at another external organisation.

Drop-down
A list of options from a pre-determined set of data (e.g. Menu membership status).

Exam Approved
The assessment has been approved by the branch or state. The club can now hold the assessment and enter the results for the members.

Exam Cancelled
The assessment has been deleted by the branch or state assessment can be deleted by branch of state at any stage before the awards are allocated. A club can only cancel/delete an assessment before it is submitted for approval by branch or state.

Exam Rejected
The assessment has been rejected by the branch or state. The assessment will not take place and it can now be archived.

Hyperlink
A navigation tool that takes users to specific information screens. Hyperlinks are indicated by alternative print colour and underlining of text, as well as a cursor change when the mouse rolls over the hyperlink.
**Incomplete Status**  
The assessment has not been submitted for approval by branch or state. The club is still able to modify any of the assessment details.

**Logon**  
To enter personal details and a pre-determined password which allows access to SurfGuard.

**Mailing Groups**  
Mailing Groups are used for creating groups of members for the purpose of mail-outs. Each mailing group must be created under a Mailing Group Type. The mailing group type is the main category that the groups will fall under.

**Mail-Outs & Reports**  
For all mail-outs or Mailing Group reports, go to the Reports Section.

**Navigate**  
To move from one screen or web page to another. This can be done by using the forward or back arrows or by clicking menu items or hyperlinks.

**New Mailing Group Type**  
This will create a new type of Mailing group (e.g. a Family group, a Patrol group, a social group).

**Proficiency**  
The member must already hold the award in order to participate in the assessment for a proficiency. Upon successful completion of the assessment, the member’s award record(s) is/are updated with the proficiency date.

**Recognition of Prior Learning**  
The member is allocated new award(s) but does not actually sit an assessment since they have the experience from such things as work, etc. Also referred to as Recognition of Current Competence.