



Surf Life Saving Australia

Surfguard

Generating Reports & FAQ'S

September 2013

Contents

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1.MEMBER REPORTS

REPORT – Who is NOT REGISTERED for current season

Go to New Custom Report

Tick on LHS – Member ID, First Name & Last Name and the following below.

The screenshot shows a web application interface for generating a membership report. On the left-hand side (LHS), there is a sidebar titled "Organisation Membership Details" with several filter options: "Membership Type:" (checked), "Date Joined:" (empty), "Date Archived:" (empty), "Is Archived in All Organisations:" (unchecked), "Status:" (empty), and "Registered for Season:" (checked). The main content area on the right is titled "Hide Organisation Membership Detail" and contains several fields: "Membership Type" with a dropdown menu showing options like Probationary, Junior Activity Member (5-13 years), Cadet Member (13-15 years), Active (15-18 yrs), Active (18yrs and over), Award Member, Reserve Active, Long Service, and Past Active; "Date Joined - From" and "Date Archived - From" with date pickers; "Is Archived in All Organisations" with a dropdown menu; "Status" with a dropdown menu showing Archived, Deceased, Expelled, and Suspended; and "Registered for Season" with a radio button selected for "Not Registered for Current Season" and a note "eg. 2010 = registered season 2010/2011". A red warning message is displayed below the "Is Archived in All Organisations" field: "** Please be especially careful when using the Is Archived in All Organisations. Your report may fail due to the processing that is required by this field. If you do require it, please filter your selection so a small data set is retrieved."

REPORT: FIND OUT ACTIVE MEMBERS FOR THE 2012/13 SEASON THAT EITHER DON'T HOLD A BM OR SRC AWARD OR THEIR PROFICIENCY HAS EXPIRED. (Template Done)

General Details: Tick LHS: Member ID, First Name, Last Name & Age
Membership Type: Tick LHS and Active (15-18yrs) and Active (18yrs & over)
Status: Tick LHS and Highlight Active
Registered for Season: Tick LHS and put in 2012
Award Name: Tick LHS
Award Expiry Date: Tick LHS
Display the Report.

Use the template first to generate the Report for Bronze Once you generate the report if you scroll to the bottom you will see that there are Active members who hold no Awards. I have copied and pasted these into the 2nd tab of the spreadsheet. We then sorted the spreadsheet by Awards and Expiry date. You can then scroll down and find the Bronze members who have an expired proficiency. I have copied these members into the 3rd tab. Then sorted the 2 extra tabs (No Awards & Expired BM) by club.

To find Active members for the 2012/13 season that either have no SRC or expired SRC change the Membership Type to Cadet Member

REPORT: EMAIL ADDRESS FOR MEMBER/S

Reports – General Reports – Member Reports

Report Type: Email Lists

Report Output:

REPORT - EMAIL ADDRESS FOR MEMBERS TO PUT IN OUTLOOK

Why Do It: Get emails to send out in Outlook to see if they bounce back

How To Generate

General Reports – Member Reports

Report Type: Email Lists

Output: Semi Colon Delimited (Text Format)

Display Report

Copy & Paste into outlook email.

You will then see what emails bounce back

REPORT: SHOW WHO DOESN'T HAVE or HAS EXPIRED MEMBER PROTECTION (Also Known As Blue Card In Qld)

Reports – Custom Reports – New Custom Report

Once report is created you can save a Template of the report for future use.

General Details:

Member ID - Tick LHS only

First Name - Tick LHS only

Last Name - Tick LHS only

Age - put in 18-99

Phone

Mobile - Tick LHS only

Email

Email address 1 - Tick LHS only

Organisation Membership Details

Status – Tick LHS & Active in Green section

Registered for season – Tick LHS and date for current season in Green section

Pick Membership Categories it is relevant to.

State Based Details

Tick all boxes on LHS except for Student Number

REPORT – CHILD PROTECTION DETAILS & PATROL TEAM

Reports – Custom Reports – New Custom Report

Once report is created you can save a Template of the report for future use.

General Details:

Member ID - Tick LHS only

First Name - Tick LHS only

Last Name - Tick LHS only

Age - put in 18-99

Phone

Mobile - Tick LHS only

Email

Email address 1 - Tick LHS only

Organisation Membership Details

Status – Tick LHS & Active in Green section

Registered for season – Tick LHS and date for current season in Green section

Pick Membership Categories it is relevant to.

State Based Details

Tick all boxes on LHS except for Student Number

Patrol Rosters

Rostered Team Name - Tick LHS only

Patrol Roster Date - Tick LHS only

Display Type: CSV (Excel)

Display Report

Once in Excel De-Duplicate by Member ID

REPORT – CLUB WANTING TO KNOW HOW MANY MEMBERS THEY HAD IN A PREVIOUS SEASON

Option 1

Reports – General Reports – Member Reports

Report Type – Membership History

Report Output: CSV

Season: put in date you are check for

You will get the number of members for the season listed at top and also name of each member.

Option 2

If you just want total numbers for each Membership Category for a specific season you can also go to the Summary Tab and

Summary Tab

Display: Membership Categories

Season: put in season you want stats for

You will then be given a List of members in each Membership Category. If you click on the Membership Category you will then be given a list of members in that category

REPORT – LIST ALL AWARDS HELD BY EACH MEMBER OF A PATROL TEAM (Template Saved)

Reports – Custom Report – New Custom Report

General Details: First Name & Last Name

Organisation Membership Details: Active & fill in Registered for.....

Awards: Tick Award Name on LHS only

Patrol Rosters: Tick Rostered Team Name on LHS and also Patrol Roster Date (you will need to go to the Patrol Roster for a specific date for a specific team.

REPORT: FIND OUT WHO DOES AND DOESN'T HAVE A LIFESAVING ONLINE ACCOUNT

Go to Reports > General Reports > Member Reports
Report Type: Lifesaving Online Accounts

REPORT – FIND OUT MEMBERS WHO HAVE RENEWED VIA LIFESAVING ONLINE
(Can Be Generated For Club, Branch, State Etc)

Reports > General Reports > Member Reports

Report Type: Pending Member Requests

Output Format: CSV Style

Click "Advanced Search"

Leave Branch & Organisation as "All"

Organisation Type: Highlight SLS Organisations, Support Operations, Other SLS Organisations

Pending Member Request Type: Highlight "Renew Club Membership"

Pending Members Request Date: 01/07/2011 – 30/06/2012 (for second report change to 01/07/2012-30/06/2013)

Display Report

When you have it in Excel format you may want to De-duplicate by Member ID & Organisation.

REPORT – FIND OUT WHO HAS PAID THEIR GYM FEES VIA PAYMENT GATEWAY

Reports – General Reports – Member Reports

Report Type – Transactions

Click on Advanced Search

Transaction Type – Gym

Transaction Payment Method – Credit Card

Date range – default for dates of current season

Display Report

Note: Transaction No. & Payer Name
Come over from Lifesaving Online.

REPORT – SENDING OUT MEMBERSHIP RENEWALS

The first step is to amend the 'Cover Letter' Template to ensure it has all the information your members need to renew their membership eg. preferred renewal method; club contact details; club fees, etc. Go to Maintenance > Templates > Edit Membership Renewal Form. Amend and save this template. Then:

- Go to 'Reports' > 'General Reports' > 'Member Reports'.
- Click on 'Advanced Search'
- Report Type = 'Membership Renewal Form'
- Output Format = PDF
- Renewal Season = 2013/2014
- Status = 'Active'
- Registered Season = 2012
- Tick the 'Email to Members' box
- Tick the 'Declaration' box
- Print Cover Letter: 'Yes'
- Print Declaration: 'Yes'
- Print Membership Details: 'No'
- Tick the Display Report Here box.
- Display Report.

Surfguard will then produce a report of members that have been emailed their pre-filled membership form and provide you with pre-filled forms for those without email addresses.

BRANCH NEED TO RUN A REPORT ON ALL U13'S FROM EACH CLUB REGISTERED FOR 2012 (NOT BY NAME) JUST A NUMBER PER CLUB.

To create report:-

Reports – General Reports

Report Type: Membership History

Organisation: need to do for each individual organisation

Age: 12 to 14

Status: Active

Registration Date: 01/07/2012 to 31/03/2013

Download report.

Highlight Column A and then under Data tab click Remove columns not required. Then sort by Date of Birth. Looking for DOB between 01/10/1999 to 30/09/2000

2.ASSESSMENT REPORTS

REPORT: STATE OFFICE FINDING OUT HOW MANY OF A SPECIFIC AWARD HAVE BEEN ALLOCATED IN A SEASON AND HOW MANY PROFICIENCIES ARE DONE

To generate a report for the information you need you can do the following

Reports > General Reports > Assessment, Awards & License Reports

Award Type: Current Awards

Output Format: CSV Style (Excel Format)

Branch: All

Organisation: All

Awards: You can either do them 1 by 1 or select the different award types

Award Allocation (Processed) Date – From: 01/07/2012 to 11/02/2013

Display Report: once you have the report in Excel you can then do sub-totals by Organisation.

Proficiencies: you would run the same report but instead of Award Allocation date you would fill in the Proficiency Allocation Date.

You can then do sub-totals for each club when in Excel

***** Club level***** - If doing this same report for a club you would sort by Award Date and NOT Award Allocation date.

REPORT: WHO IS PROFICIENT FOR CURRENT SEASON FOR AN AWARD

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Current Awards

Status: Active

Award Type: All

Award: Choose the Award

Award Expiry Date – From: enter dates as required depending on search

REPORT: HISTORICAL ASSESSMENT REPORT

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Awards History

Award Type: All

Award: Choose the Award

Either:

1. Award Date From: Awards given for date range
2. Proficiency Date: Proficiency given for a specific Date Range

REPORT –CHECK REQUIREMENTS OF THE AWARD FOR CANDIDATE, TRAINER & ASSESSOR

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Reference: Awards

Award: Choose the Award

Display Report

REPORT – BRANCH TRYING TO FIND OUT WHERE A MEMBER HAS DONE AN AWARD OR PROFICIENCY

Reports – General Reports – Assessment, Awards & License Reports

Report Type: Assessments

Report Output: CSV

Organisation: All

Put in First & Last Name of Candidate

Award Type: All

Award: find the award

Assessment Date: When you run the Assessment Report it is sometime a good idea to put in a large date range in the Assessment Date, eg 01/01/2002 to 01/01/2020. Just in case someone has entered an incorrect date.

Display Report

REPORT: TO FIND OUT WHO IS NOT PROFICIENT IN NIPPER PROFICIENCIES FOR CURRENT SEASON (CAN BE USED FOR OTHER PROFICIENCIES)

Go to New Custom Report

Open General Details: First Name & Last Name

Open Organisation Membership Details

Put In: Member Type, Active, Season eg 2012 and Age Category if a Nipper Report

Open Awards

Tick LHS box for "Awards" but don't highlight any award type. Also Tick LHS boxes "Award Date" & "Proficiency Date" & Award Expiry Date

Download Report in CSV

Once in Excel sort by Award column

Remove any unnecessary Awards in the Award Column

Change back to sort by name

There will be gaps next to names of people who don't have proficiencies

(Template Saved)

REPORT: LIST OF AWARDS GAINED IN A SEASON

Note: this report will show Awards gained by members at any Originating Organisation.

Go to Reports > General Reports > Assessment, Awards & License Reports

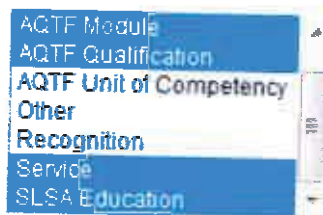
Report Type: Current Awards

Output Format: CSV Style (Excel Format)

Status: Active

Registered Season: Leave blank

Award Type:



This can be changed depending on the needs of the club, you can display all Award Types if required including all Units of Competency.

Award Date: 01/07/2012 – 30/06/2013

Display Report

Once in Excel get rid of all columns not required.

Sort by Award Name.

If you want to get a total of each Award then do a Sub-total based on change of Award Name and do a count.

03/09/2013

REPORT: CLUB WANTS TO FIND OUT WHO IS ELIGIBLE/QUALIFIES TO BE RAISED IN AN ASSESSMENT FOR AN AWARD

Go to Reports > General Reports > Assessment, Awards & License Reports
Report Type: Assessment Eligibility

REPORT: POINT LOOKOUT WANT TO KNOW HOW MANY ASSESSMENTS HAVE BEEN DONE BY POINT LOOKOUT ASSESSORS DURING THE SEASON AT POINT LOOKOUT AND REST OF QLD

Need to be in as SLSQ

Assessments, Award & License Reports

Output: CSV Style (Excel)

Advanced Search

Assessment Branch: All

Assessment Organisation: All

Award Type



Awards: Don't highlight any

Assessment Date: 01/07/2012 – 30/06/2013

Assessment Type: Award

Assessment Status: Complete & Archived

Display Report

When in Excel

Get rid of columns you don't want (address, phone, email etc)

Sort by Membership Organisation & Membership ID

Find members in Membership Organisation – Point Lookout and copy into new Worksheet

In the new worksheet de-duplicate based on Member ID & Assessment ID

Do a Sub-total at change of Member ID.

3.PATROL REPORTS

REPORT – PATROL TYPE HOURS FOR A MEMBER

Reports – General Reports

Report Type: Patrol Type Hours

Output: CSV (Excel)

First Name

Last Name

Can put in season or put in date range.

Suri Life Saving QLD - Point Danger Branch - Tallebudgers												
Member ID	Surname	First Name	Patrol Date	Patrol Start Time	Patrol Finish Time	Member Start	Member Finish	Organisation Name	Patrol Log Name	Patrol Type	Member Hours	
5000602	Clouston	Ethan	Sun 15/01/2012	12:30	16:00	12:30	16:00	Tallebudgers	TAL Patrol: 15/	Voluntary	3.3	
5000602	Clouston	Ethan	Sun 26/02/2012	12:30	17:00	12:30	17:00	Tallebudgers	TAL Patrol: 26/	Voluntary	4.5	
5000602	Clouston	Ethan	Sat 07/04/2012	12:30	17:00	12:30	17:00	Tallebudgers	TAL Patrol: 07/	Voluntary	4.5	
5000602	Clouston	Ethan	Sun 30/09/2012	9:00	11:00	9:00	11:00	Ellis Beach	Juniors	Visitor	2	
5000602	Clouston	Ethan	Sun 30/09/2012	13:00	17:00	13:00	17:00	Ellis Beach	01 Bell	Visitor	3.5	

REPORT: HOW TO ASCERTAIN TOTAL PATROL HOURS FOR EACH MEMBER

(Note: this report allows you to break down by Patrol Log Name)

This report will give you members patrol hours for 'all' organisations that they have patrolled for.

Reports

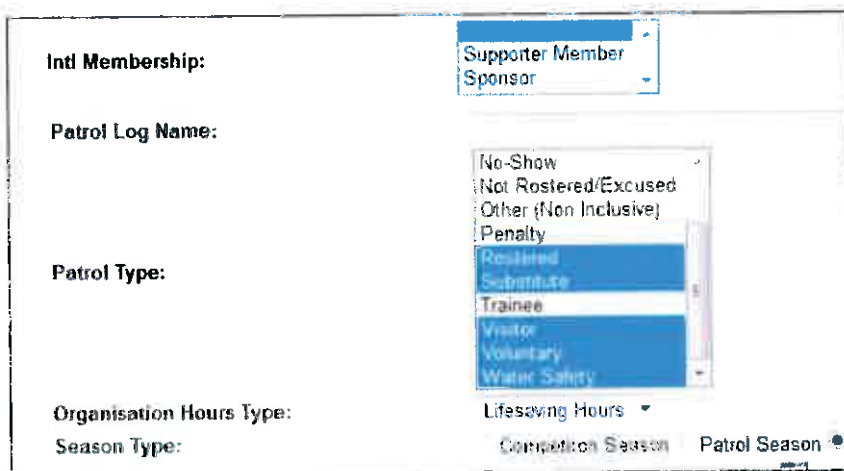
General Reports

Patrol Reports

Select - Patrol Type Hours report

Click on advanced search – and select the following patrol types (Make Up, Rostered, Substitute, Visitor, Voluntary and Water Safety

Report Output – CSV.

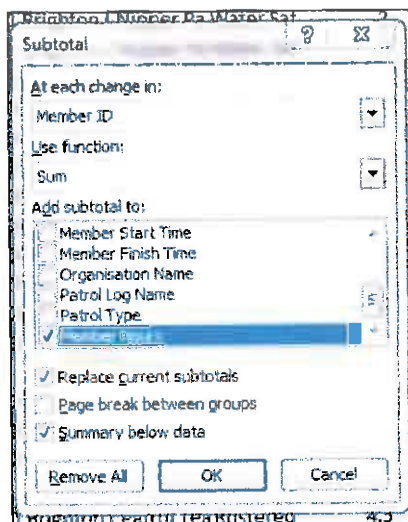


Once you have produced the report

Delete first row so that column headers are at the top

Highlight all data – click on data from top menu – click on subtotal

Select in 'subtotal' box – Member ID, Sum and Member hours (see diagram below)



If you are a genius at excel spreadsheets and subtotal you could close the subtotal columns on the left hand side which will leave you with just member ID and total number of patrol hours.

Scroll down to find any members with the patrol hour numbers that you are looking for

TOTAL MEMBER PATROL HOURS REPORT – Custom report

- With membership category –
- Does not include Water Safety
- Does not include other organisations
- Template Saved – Total Member Patrol Hours with Membership Category & Specific Patrol Types

Custom Report

General Details (tick LHS)

First name

Last name

Member ID

Organisation Membership Details (tick LHS)

Membership Type

Status (highlight all status options (RHS)

Registered for season (type in 2012 (RHS))

Patrol Logs (tick LHS)

Patrol Log Date (type in 01/07/2012 to 30/06/2013 RHS)

Patrol Log Status

Patrol Log Members (tick LHS)

Member Patrol Type (select – Make Up, Rostered, Substitute, Visitor, Voluntary (RHS)

Member Patrol Time Duration

Select CSV excel format for download format

In Excel need to Sub Total at change of Member ID and also then fix up so you have 1 line for each member.

**REPORT: TOTAL ROSTERED PATROL HOURS AND WATER SAFETY FOR EACH MEMBER
BREAKING IT DOWN BY MEMBERSHIP CATEGORY
(You can't do this in the Total Member Patrol Hours because there is no option for
Membership Category – enhancement requested)**

Reports > General Reports > Patrol Reports

Report Type: Patrol Type Hours

Display: CSV Advance Search

Status: Active

Registered Season: 2012

Membership Type: Highlight one Membership Type (will have to do report for each membership type) as the Membership Type does not appear as a column in Excel.

Patrol Type: Highlight for example (Make Up, Rostered, Substitute, Visitor, Voluntary and Water Safety)

Date Range: use default date unless you want specific dates

Display Report

Once you have displayed the report you can do "sub total" in Excel by Member ID and add up hours

REPORT: STATE OFFICE WANTING TO SEE HOW MANY PATROL TEAMS EACH CLUB HAS

Reports > General Reports > Patrol Reports

Report Type: Total Team Patrol Hours

Output: CSV Advanced Search

Branch: All

Organisation: All

Leave the Default Date Range

Once you download the report into Excel. You can delete all columns except for Organisation and Team Name

You can then do a Sub Total based on each change of Organisation Name and the get a Count based on Team Name

03/09/2013

REPORT: FIND MEMBERS WHO ARE NOT COMPLETING THEIR PATROL HOURS

Reports > General Reports > Patrol Reports

Report Type: Total Member Patrol Hours

Output Format: CSV Style

Click: Advanced Search

Status: Active

Registered Season: 2012

Season Type: Patrol Season

Total Hours: Choose how you want to filter from the drop down menu and put the number of hours.

Display the Report

REPORT: TOTAL MEMBER PATROL HOURS

You can obtain a report for each club of their members 'total Patrol Hours'. Drill down to the club level (as this report is only available at club level)

Click on reports – general reports – patrol reports

Select 'total Member Patrol Hours' report.

Select the output format.

At the bottom of the screen change the date range to 01/07/2002 to current date (see below). Some clubs have put into surfguard 'past patrol hours' gained by members prior to surfguard birth in 2003 so you may wish to set the date range back even further.

Once you have this report (in CSV style – delete all columns except first name, last name and All Patrolled Hours (Excluding Penalty Hours)).

Patrol Reports @ South Maroubra

Report Type: Total Member Patrol Hours Advanced Search

Output Format: CSV Style | Excel Format

Please Note: The report will only display total hours for the current organisation. To display patrol hours for other organisations, please use the Patrol Type Hours report.

Please Note: The Deficit Hours calculation is only a rule of thumb. Each organisation may calculate their own deficit hours using their own rules. Use it only as a rough guide.

Enter the following fields to narrow your search:

Member ID: _____

First Name: _____

Last Name - From: _____ To: _____

Gender: All Male Female

Registered Season: _____ eg 2012 = registered season 2012/2013

Season Type: Competition Season Patrol Season Date Range

From: 01/07/2002

To: 21/11/2012

Display Report Clear

REPORT: TOTAL MEMBERS PATROL HOURS FOR MARCH

Patrols – General Reports – Patrol Reports

Report Type: Total Member Patrol Hours

Output Format: CSV Style (Excel Format)

Click on Advanced Search

UNTICK “Include Postal Address and DOB in Output”

Status: Active

Organisation Hours Type: Lifesaving Hours

Season Type: Make sure the default is date range

Put in the date range 01/03/2013 – 31/03/2013

UNTICK Include Deficit Hours in Output

Click on Display Report at bottom of page.

REPORT TO GET THE FOLLOWING STATS BY A BRANCH FOR EACH MONTH

- Rescues performed
- Activity during rescue i.e. swimming, boardriding
- Equipment uses during rescue i.e. board or IRB
- No first aid cases performed
- No Marine stings
- No visitors to the beach

Go to Reports>General Reports>Patrol Reports

Report Type: Patrolled and/or Unpatrolled Stats

Output Format: CSV Style (Excel Format)

Click Advance Search

Organisation: All

Include Breakdown by Organisation: Tick this box if you want an additional breakdown for each club

Organisation Type: SLS Organisations

Stats Type: All

Season Type: Make sure the Date Range is highlighted and then you would put in the date range for each month, eg 01/11/2012 – 30/11/2012

Display Section: All

Under the Summary tab you can also get a summary of Patrol Stats but it only does it for the entire season, there is no option to breakdown by month.

03/09/2013

REPORT TO GET FOR SLSNSW PATROL STATS – RESCUES FOR EACH BEACH LIFEGUARDS, SLS ORGANISATIONS, SUPPORT OPERATIONS.

Was in as SLSNSW

Reports > General Reports > Patrol Reports > patrolled and/or Unpatrolled Stats – Rescues

Output Format: CSV Style

Click Advanced Search

Branch: All

Include Breakdown by Branch/Organisation: tick box

Exclude State: untick box

Organisation Type: Beach Lifeguards, SLS Organisations, Support Operations

Stats Type: All

Season Type: enter date range

Rescue Type: don't highlight any

Breakdown by Rescue Periods: untick box

REPORT – PATROLLED AND/OR UNPATROLLED STATS

(report will show stats for State, Branch or clubs on types of Rescues done for date range requested)

Reports – General Reports – Patrol Reports

Report Type: Patrolled and/or Unpatrolled Stats

Output: CSV/Excel

Click on Advanced Search

Branch: All

Organisation: All

Include Breakdown by Branch/Organisation: Tick box

Organisation Type: Highlight “SLS Organisations”

Stats Type: All

Season Type: Leave as default date range or modify

Display Sections: Highlight “Rescues”

Display Report

03/09/2013

4 MESSAGING REPORTS

SEND EMAIL OUT TO ACTIVE MEMBERS IN CURRENT SEASON AND ALSO THOSE WHO HAVE NOT RENEWED FROM PREVIOUS SEASON

Go to Message > Email/SMS

Message Type: Communicate With Members

Output Format: Email

Click 'Advanced Search'

DON'T USE "Registered Season"

USE: Registration Date eg 01/07/2012 – 31/05/2013

SEND MESSAGE TO MEMBERS ADVISING WHEN THEIR AWARD IS EXPIRING (EG SENIOR FIRST AID)

To do this a club can go to the Email/SMS option

Once loaded open the "awards" filtering section by ticking the "awards" box.

You can then select the award (eg Senior First aid) and

Select an expiry date period (eg "from" 01/02/2013 – "To" 30/04/2013).

This will then list all members in the club who hold an award of that type that will be expiring in the next 3 months.

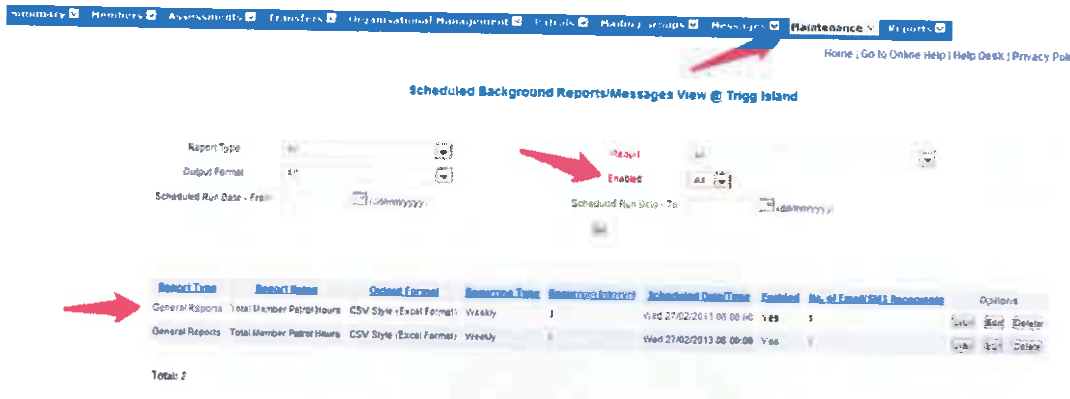
The club can then send an SMS message or email to all these people letting them know that their award is expiring and suggest some requal days etc.

The club can also suggest logging onto lifesaving online also to see exactly when their award is expiring if need be.

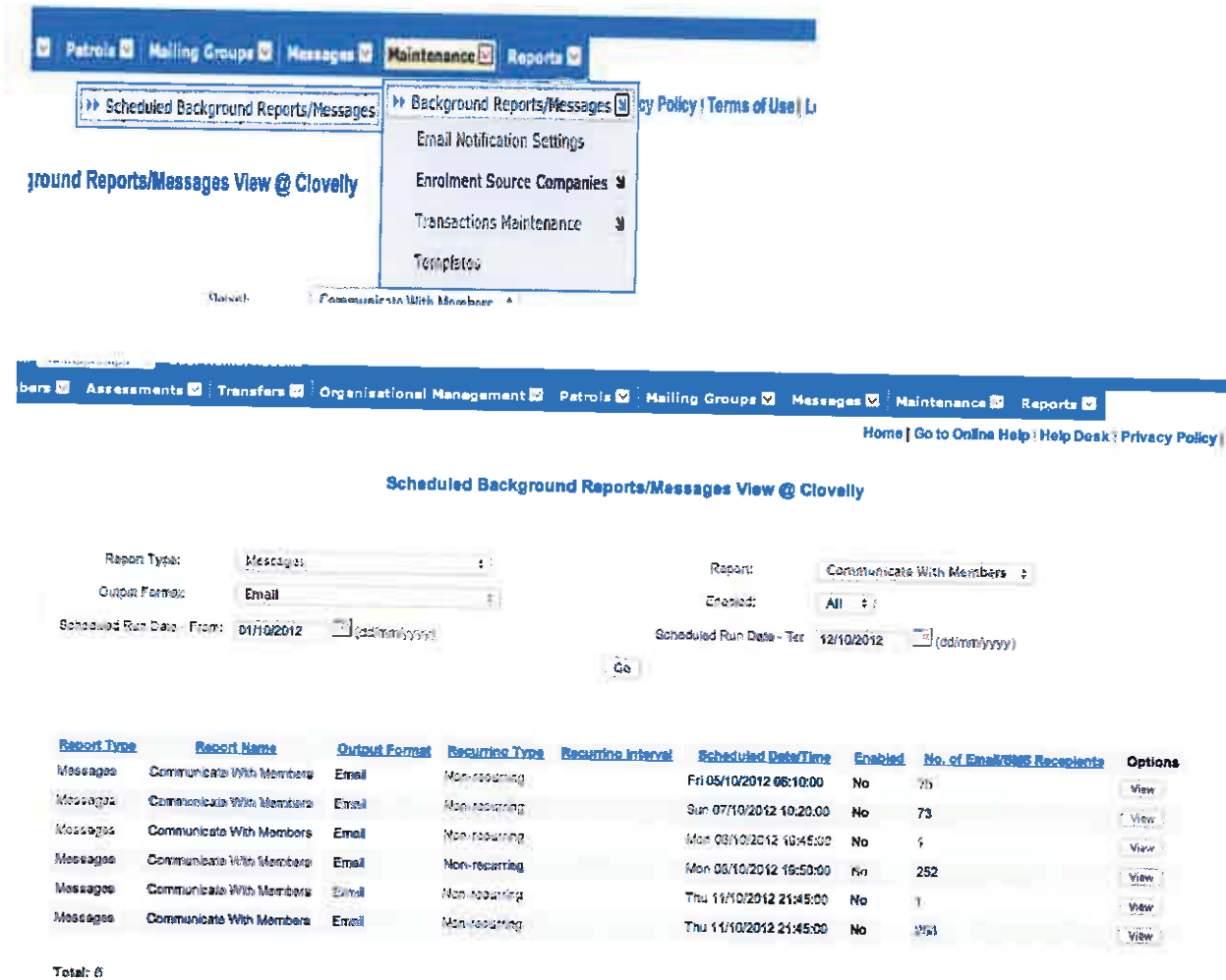
5 MAINTENANCE REPORTS

REPORT: HOW TO CANCEL A SCHEDULED REPORT

Scheduled reports are located under Maintenance > Background Reports/Messages. If you click Enabled dropdown box to "All" you will see your two reports and can View, Edit or Delete based on your Surfguard User Account permissions.



REPORT: WHAT IS COMMUNICATED TO MEMBERS



6 LIFEGUARD REPORTS

REPORT: TO QUANTIFY THE NUMBER OF LIFEGUARD EMPLOYEES BY STATE.

Reports – General Reports – Member Reports

Report Type: Membership Details

State (Surf Life Saving NSW) need to do each state individually

CSV FormatAdvanced

Status: Active

Season: 2012

Membership Type:



Use the Ctrl or the Shift key to select multiple membership types.

Untick: any other boxes that are ticked

Say no to all other options

Once you get the report I sorted by Member ID (to get rid of member protection lines) and then de-duplicated by member ID.

7 OTHER REPORTS

REPORT – SURFGUARD USER ACCOUNT

Reports – General Reports – Organisational Management

Report Type – Users

Output:

Display Report

8.FREQUENTLY ASKED QUESTIONS

Surfguard - How do I change a Date Of Birth (DOB)

Changes of Date of Birth have to be done by State office.

Surfguard - How do I get a Patrol Log re-opened

Patrol Logs can only be reopened by Branch or State. You can generate the request via Surfguard by going to the log you want reopened and click "Request Re-open"

Patrol Logs View @ Test NSW Club

Patrol Dates From: 01/01/2013 To: 22/05/2013

Log Status: All Patrol Name Contains:

Organization	Date	Patrol Name	Start Time	Finish Time	Status	Days Open	Actions
Test NSW Club	Wed 22/05/2013	Voluntary Patrol	08:00	19:00	Closed	1	<input type="button" value="View Log"/> <input type="button" value="Print Log"/> <input type="button" value="Stats"/> <input type="button" value="Notes"/> <input type="button" value="Request Re-open"/> <input type="button" value="Request Delete"/> <input type="button" value="Request History/Status"/>

Surfguard - How do I delete Duplicate members

The first thing you need to do is have the following information exact in both Membership ID's.

- First Name
- Last Name
- Date of Birth – you need to contact your State office to request change of DOB.

Once you have the exact information in both ID's you then need to Archive the Member ID you don't want and leave the preferred ID as Active.

Surfguard will then merge the two ID's overnight.

Surfguard - How can I see what Emails or SMS have been sent to members.

Go to Maintenance Reports in the Generating Reports section.
View the Report: What Is Communicated To Members.

Surfguard – A member not found when doing a search in Surfguard

Tick the boxes to include Suspended, Deceased & Expelled in your search

Surfguard - How do I email out Membership Renewal forms for the next season

The first step is to amend the 'Cover Letter' Template to ensure it has all the information your members need to renew their membership eg. preferred renewal method; club contact details; club fees, etc. Go to Maintenance > Templates > Edit Membership Renewal Form. Amend and save this template. Then:

- Go to 'Reports' > 'General Reports' > 'Member Reports'.
- Click on 'Advanced Search'
- Report Type = 'Membership Renewal Form'
- Output Format = PDF
- Renewal Season = 2013/2014
- Status = 'Active'
- Registered Season = 2012
- Tick the 'Email to Members' box
- Tick the 'Declaration' box
- Print Cover Letter: 'Yes'
- Print Declaration: 'Yes'
- Print Membership Details: 'No'
- Tick the Display Report Here box.
- Display Report.

Surfguard will then produce a report of members that have been emailed their pre-filled membership form and provide you with pre-filled forms for those without email addresses.

Surfguard - Who has an active Surfguard User Account

Go to Other Reports in the Generating Reports section
View the Report: Surfguard User Account

Surfguard - How can I check in Surfguard if a member is eligible for a Long Service Award

There is not a report you can generate in Surfguard to get this information. Surfguard was only created in 2003. We recommend clubs use their Annual Reports and also Patrol Logs if necessary.

Surfguard - I can't add a Member to a New Assessment Request it says they are already in an Assessment.

Go to General Reports – Assessments, Awards & License Reports

Report Type: Assessments

Put in Member ID or First & Last Name

Don't choose any specific award

Extend assessment dates – eg 01/07/2000 - 30/06/2020

Display Report

This will show any Assessment the member has ever been in and if it is complete or incomplete.

Surfguard - Our member holds an old Bronze Medallion (showing in Surfguard) they are now doing their Bronze again. How do I enter the New Bronze in Surfguard

You need to do the following:-

Create a New Assessment Request for the Cert II Public Safety (Aquatic Rescue)

Create a New Assessment request as a Proficiency for the Bronze Medallion.

Surfguard - I want to check members who have an incorrect email address, how can I do this to get bounce backs

Go to Member Reports in the Generating Reports section

View the Report: Email Address For Members To Put In Outlook.

Surfguard - I can't add a Trainer or Assessor to a New Assessment Request.

Open up in Surfguard the trainer/assessor membership details and check that they are active for the current season and then open up their Awards.

Go to the Assessment ID and open up the Assessment, scroll down to the bottom of the screen and open up "Award Reference Report". You will then be taken to a new screen, click Display Report.

Scroll down to the Assessor and/or Trainer Requirement Conditions

Check the conditions against what the Assessor/Trainer has in their Awards.

If they hold all the necessary Awards contact the Helpdesk.

Surfguard - We have a member who has transferred to our club and does not have all their Awards showing.

Member needs to contact their old club to get details of Award

Member needs to have Form 80 completed with evidence.

Member then needs to contact the state office of their new organisation

New club has to ensure updated proficiency if required.

NOTE: Awards are attached to a member and do not get deleted when a transfer is done.

Surfguard - How do I delete a member from Surfguard

Members are never deleted from Surfguard they are Archived.

Surfguard - How do I send out an Email to Active Members for the current season and also to those who have not renewed from the previous season

Go to Messaging in the Generating Reports section

View: Send Email Out To Active Members In Current Season And Also Those Who Have Not Renewed From Previous Season

Surfguard - If 4 members of one family have the same Email address how do I set it up to only send the email out once.

Surfguard will only send the email out once.

Surfguard - If a member has 2 email addresses in their Membership details does the email get sent to both of them.

No, the email will be sent to the first email address in Surfguard Membership details.

Surfguard - How do I add a new member to our club if they have already been a member as a Lifeguard or in an Academy

This needs to be done at a club level

The normal transfer procedure does not apply

Go to Add Member and put in their First Name, Last Name, DOB and Gender

Click "Check for Duplicate"

When you get asked do you want to add the member to your club, click Yes

Surfguard - Can Surfguard create one mailing label for a family instead of individual labels

When in the Mailing Labels report you can get Surfguard to create one label for a family instead of individual labels for each family member. Need to tick: Unique Address.

Surfguard - I am unable to add and Incident Report to a Patrol Log

When you create you are completing a Patrol Log and fill in the stats if you click Save you are given the option to go to IRD. If you don't go to IRD at this point you will have to change the Application to IRD

Surfguard - I am unable to put a new SRC into a Patrol Log as their name does not appear in the Member List?

Check patrolling Membership Categories under the Patrol Tab

Make sure the SRC is in a Membership Category that displays in the Member List ie change them from Junior Activity to Cadet.

Surfguard - I accidentally rejected a Pending Member request, can I reverse it?

A pending that has been rejected cannot be reversed. You will need to get the member to put the request through again.

CMS - How do I do a force surfguard update

Once you have logged into the carnival system go to Force **Surfguard Member List Update** under **Options**.

Options

Create New Carnival

Manage Users

Manage Classes and Event Types

Manage Patrol Hours per Membership Category

Force SurfGuard Member List Update

Payment Gateway - How do we set our club up for the Payment Gateway

Payment Gateway accounts are created by SLSA IT Support team. A club needs to complete Form 75 & Form 79 and either scan & email or fax to ithelp@slsa.asn.au

Payment Gateway - Can we have more than 1 account in the Payment Gateway

Clubs can have more than one account, however one of the accounts will be set as the default account and members will need to be given clear instructions how to search for other accounts.