PAM Database - Newsletter #12   June 2017

A short newsletter this month as one season draws to a close and the next one gets a little bit closer in the distance (gulp!). Biggest thing to be aware of this month is the DATABASE ROLLOVER – please get in touch if you have any questions.

Database Rollover – Friday 30 June 2017

It's fast approaching! For those of you who aren't familiar with this annual process, here's an outline of what happens and what's needed from clubs:

1. Staff do a final check of the database information (make sure yours is right!)
2. We **end** the 2016/2017 season (everything becomes historic information).
3. All active memberships are deactivated (everyone goes back to being inactive).
4. We **start** the 2017/2018 season.
5. We make every life member active again.
6. All other memberships are inactive, waiting for you to start rolling them over!

This process is completed by myself and takes about half a day. We ask that you don't use the database during this time however we will send reminder emails about this to you closer to the time.

User Guides

Everything you need to know about the CRM is now packed into one epic user guide! Thanks for your patience while this was constructed – you can find it on the PAM Page on our website.

Next up is an update to the Member Portal guide as we chip away at updating what we currently have available. We'll let you know when the latest version is out.

Patrol Input

Thanks to everyone for their efforts in getting their data in to the database this season! When you check your patrol occurrences it's important that the following fields are correct on the form:

- Make sure that you have ticked '**All Attendance Updated**'.
- Make sure the Patrol Status is set to '**Planned**'.

Booking System

Exciting new functionality! We are in the process of testing our new booking system which will enable members to enter themselves onto courses! Club administrators will be able to manage their members bookings more smoothly too. We look forward to bringing you more information about this system in the very near future.

Admin Workshops

We're getting ready to tour the country again in the coming season and can't wait to see our returning and new club admins. At this stage we have dates pencilled in the calendar and will send out information to all regions a bit closer to the time. These workshops are a great chance to bring up any questions/problems so start thinking now about anything you'd like to have cleared up when we visit. **Rough agenda below:**

CRM – membership rollover, membership reports, touch on patrol entry, club roles, PAM page on website.
Portal – creating a Portal log in for members, new features on the Portal.
Course Booking System – how to add people to courses, background processes.
Online Learning – how members can use it and what it does.
Entry System – making people active, awards.
Admin Practices – beginning of the season, staff members, who's who.

Regards,
Georgia McLaren (SLSNZ Database Administrator)