



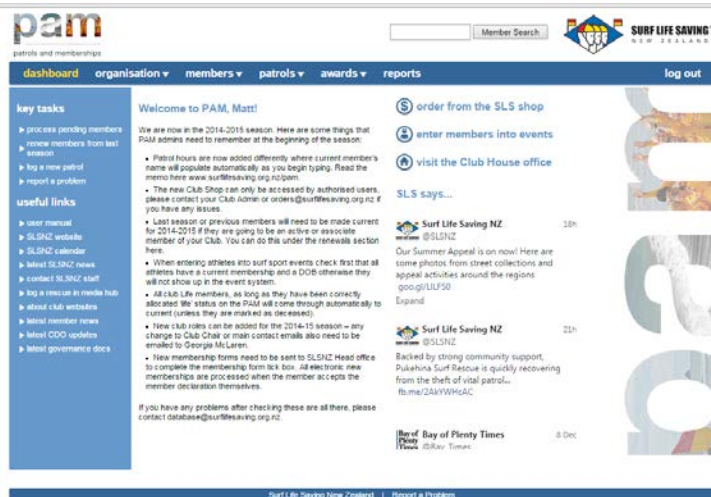
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Patrols and Member Database Newsletter

December 2014

Overview:

Our current PAM (Patrols and Member database) was built in 2001 and we have been using this since. This system has served us well for the best part of 15 years but now does not have the capability to keep up with current developments in the IT and communications world. Around four years ago Surf Life Saving New Zealand (SLSNZ) began searching for a suitable replacement for this system.



The scope of the replacement project was:

- Build a replacement system that has all of the elements of the current PAM (like for like)
- Look for an “out of the box” product rather than bespoke system.
- The new system has the ability to be developed in the future to meet the needs of SLS.

SLSNZ has spent considerable time looking at the current and future needs and received plenty of feedback from the members and staff about the challenges of the old system and the future requirements. We then spent about 12 months looking at systems that would provide a solution and could meet the bulk of our requirements. The Microsoft Dynamic CRM product came out as the preferred solution and the next challenge from here was finding the right company that could do the developments that we need for our organisation.

Approximately six months ago SLSNZ teamed up with OA Systems from Auckland to begin the design and building of the new database. OA are have an experienced team in developing Microsoft CRM and have worked with many other not for profit and educational organisations to develop the CRM, in a similar manner to our needs.

We were fortunate to develop a link with NZ Mountain Safety Council who have been through the same development in the past 3 years and we were able to use a lot the IP they have already developed saving us considerable time and money.

The new database has almost finished being built and ready to enter an initial testing stage.



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New Database Features:

The scope of the project is to replace PAM using a like for like basis. We want to copy the functionality of the current database and be able to enhance and add features in the future. The out of the box CRM will have additional functionality to the current PAM. Key elements of the new database include:

- CRM – database to store member information and patrol information.
- Web Portals:
 1. Admin portal – a system for club administrators to do basic functions such as adding and changing details, addresses and numbers as well as basic reporting.
 2. Member portal – members will be able to log in to their profiles and view and amend details.
- Ability for administrators to email directly from club lists.
- Link with apps and look at developing future apps to enter patrols from mobile devices.

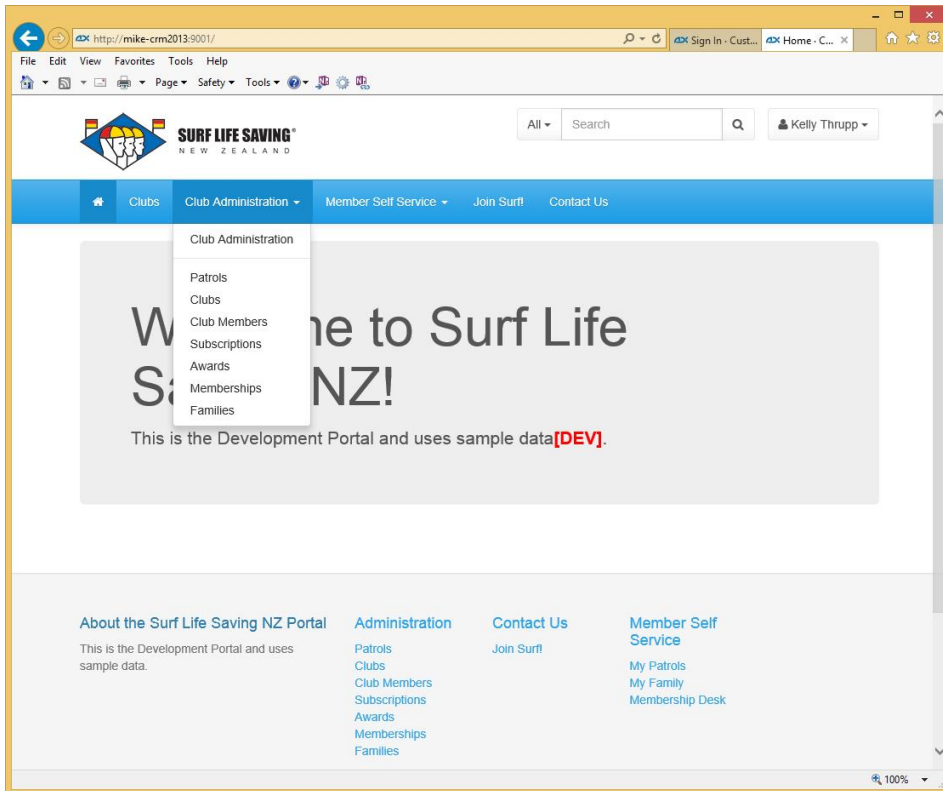
The screenshot shows the Microsoft Dynamics CRM interface for a club profile. The top navigation bar includes 'Microsoft Dynamics CRM', 'SERVICE', 'Accounts', and 'Far North SLSC'. The main header displays 'ACCOUNT : ACCOUNT - SLSNZ' and 'Far North SLSC'. Key fields include 'Owner* Michael Baldwin', 'Club Type* Active', and 'Region --'. The 'Club Details' section lists contact information for Simon Smith, including phone number (09) 4094800. The 'Location' section shows the physical address: Takahe Road, Ahipara Beach. A map is displayed with a Bing watermark and a message: 'The specified credentials are invalid. You can sign up for a free developer account at http://www.bingmapsportal.com'. The 'Status Reason' is listed as 'Active'.

Screenshot from OA developers – Microsoft CRM club profile.

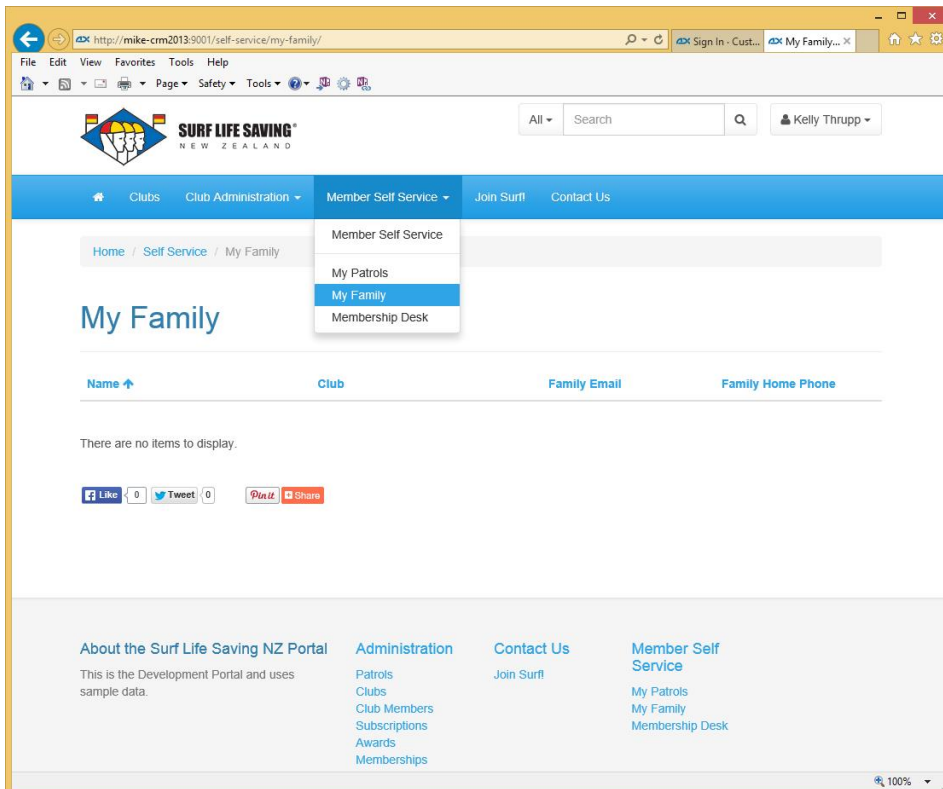




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Screenshots from OA developers. Above: club administrator portal. Below: member portal



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New Database Title:

While we are developing the new database we are also considering if this needs a new name. PAM was developed over the years for the old system and we are looking at options to change if needed. We'd like to open up the opportunity to our clubs to name the new database. Please forward your suggestions to georgia.mclaren@surflifesaving.org.nz by Friday 27th Feb 2015.

Key Dates:

- **Mid-December 2014 – Initial testing**
The team in charge of testing the database will be made up of a very small group of key database users. The purpose of this stage is to fully utilise the system to check that all processes run without error and any kinks are ironed out.
- **January 2015 – changes and testing cont.**
Any changes that the testing team identify need to be made are done by OA in this stage. These processes will be rechecked by a much larger test team after changes have been made. This is basically a fool-proofing stage.
- **February and March 2015 – Pilot**
Data from the previous database will be brought over to test on the new database. And tested in one geographic area to test everything is running on a smaller scale before we go live.
- **April 2015 – training**
SLSNZ staff will be trained on how to use the new system. This training will be delivered by a training team of selected staff members. Support in regions will be ongoing throughout.
- **July 2015 – ready to go live**
- **July/August/September 2015**
Regional training workshops held by trained staff.

Questions or comments:

If you have any questions or comments please direct these to Georgia McLaren, georgia.mclaren@surflifesaving.org.nz.



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