



Patrols and Member Database Newsletter #2

March 2014

Project Update:

We have made a lot of progress in the past few months with the new PAM. OA Systems have built the Base CRM and the Web portals. We are currently working through user acceptance testing (UAT) which means going through every screen and action in the system. We are testing all of the actions to make sure there are no bugs and more importantly that the new systems performs the functions that we want it to do. As we go through this process we are continually making minor changes to make the system easier to use for the members and staff that will use the system.

As this is a new system built on a very different platform to the current PAM we will have extensive training for club administrators for both the web portal and base CRM. Initially some clubs will only use the functionality of the portal and move to the main CRM at a later date. Some clubs will want to use the full CRM immediately to make full use of the reporting, email and other functions available.

Work to date:

The system has been built and we have spent the past four months in a familiarisation and test phase. There has been two parts to this:

UAT – we have been testing every part of the system and logged any issues to be repaired. We have completed 95% of the UAT testing and have a few cases left to resolve.

Pilot - this involved a group of people from across the county both staff and members for an intense day of using the system and finding any issues that need to be resolved.

Key Dates:

Current timeline for the project

Scope and design	Jan – Oct 2014	Complete
Development	October 14 - January 15	Complete
User Acceptance Testing	Feb – April 15	95% Complete
Pilot testing	May 15	Complete
Staff Training	May/June 2015	On Target
Administrator Training	June & July 2015	On Target
GO LIVE DATE	1 July 2015	On Target
Ongoing support and training	1 July and Ongoing	

Database Features:

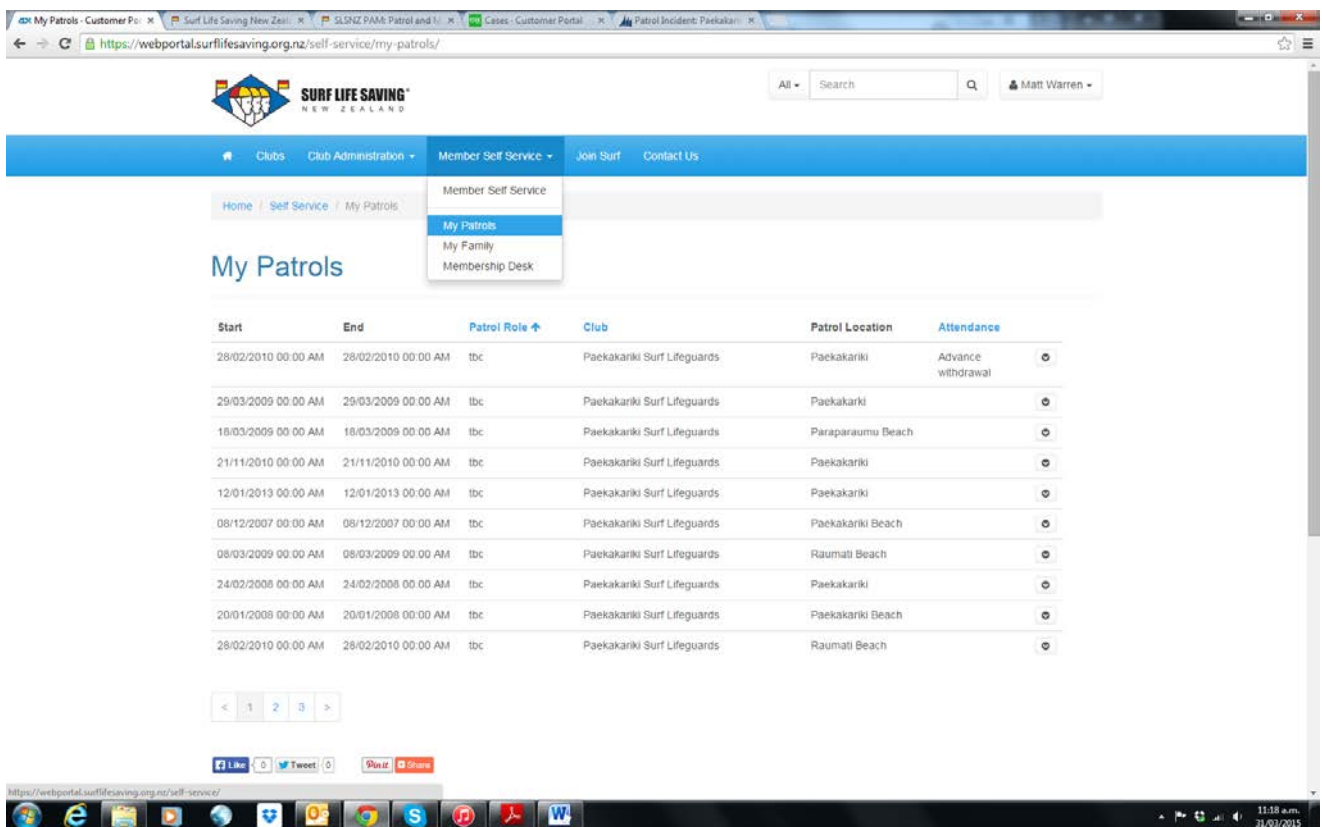
The Microsoft dynamic CRM is a complex tool used to store information and provide functions that allow the user to the data in a range of ways. This database system is very different to the current Pam system that we use and needs the added complexity to enable the functionality. The complexity does mean that the system will require more training to be able to complete the functions but should be quite easy to do some of the more basic functions.

To make life easier for the clubs that need to use the database we have developed a web portal to act as an easier way to access and edit the majority of the functions that most clubs administrators will need to use. This is very easy to access and use and also provides access for individual members to view and edit their own information.

Self Service Portal:

The self-service portal will be accessed by all members and here they will be able to do the following functions:

- View their profile
- Update their details
- View their patrols, and indicate if they can't attend
- View their awards
- Link to the SLSNZ website
- Transfer to another club or create a secondary membership to another club.



The screenshot shows a web browser window displaying the Surf Life Saving New Zealand self-service portal. The page title is "My Patrols" and the URL is "https://webportal.surflifesaving.org.nz/self-service/my-patrols/". The user is logged in as "Matt Warren". The page features a navigation menu with "Clubs", "Club Administration", "Member Self Service", "Join Surf", and "Contact Us". The "Member Self Service" menu is expanded, showing "Member Self Service", "My Patrols", "My Family", and "Membership Desk". The "My Patrols" page displays a table of patrol records with the following columns: Start, End, Patrol Role, Club, Patrol Location, and Attendance. The table contains 10 rows of data, all with a "tbc" (to be confirmed) status. The table is paginated, showing 10 records out of 10. The page also includes social media sharing buttons for Facebook, Twitter, and LinkedIn.

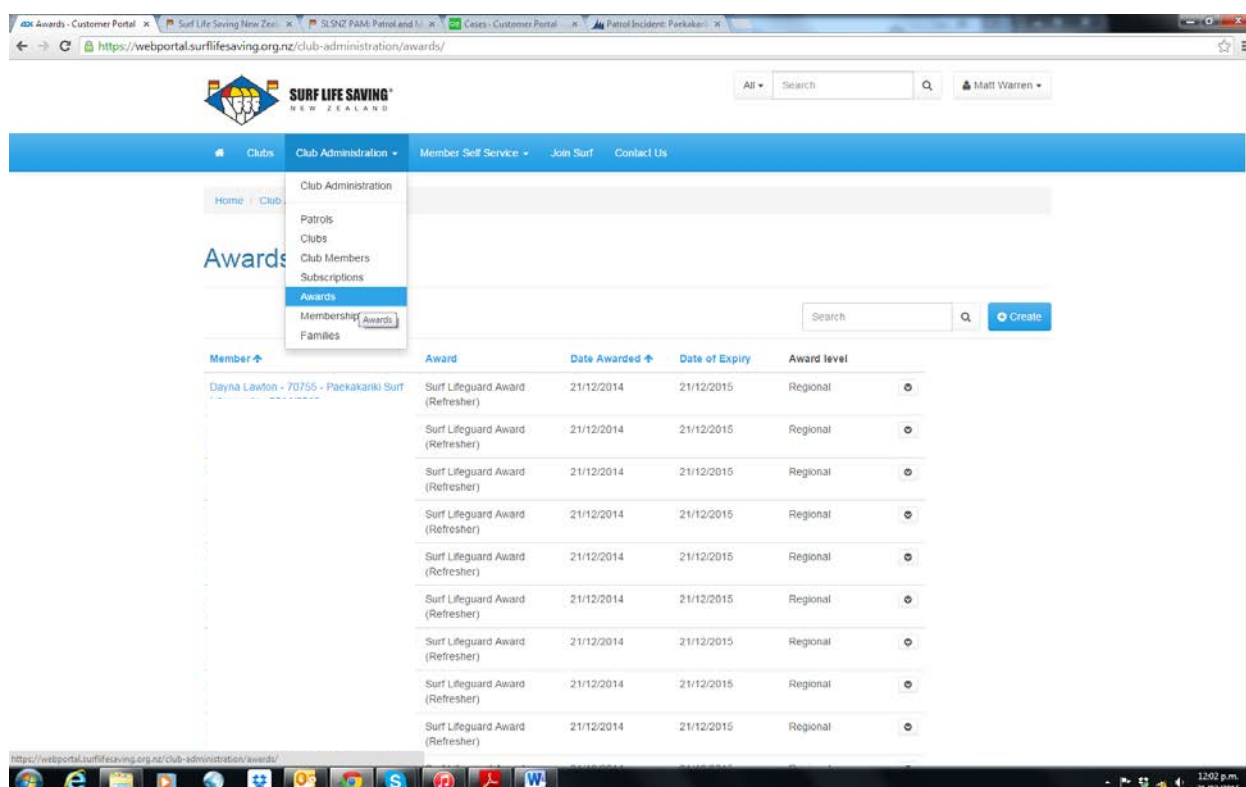
Start	End	Patrol Role	Club	Patrol Location	Attendance
28/02/2010 00:00 AM	28/02/2010 00:00 AM	tbc	Paekakariki Surf Lifeguards	Paekakariki	Advance withdrawal
29/03/2009 00:00 AM	29/03/2009 00:00 AM	tbc	Paekakariki Surf Lifeguards	Paekakariki	
18/03/2009 00:00 AM	18/03/2009 00:00 AM	tbc	Paekakariki Surf Lifeguards	Paraparaumu Beach	
21/11/2010 00:00 AM	21/11/2010 00:00 AM	tbc	Paekakariki Surf Lifeguards	Paekakariki	
12/01/2013 00:00 AM	12/01/2013 00:00 AM	tbc	Paekakariki Surf Lifeguards	Paekakariki	
08/12/2007 00:00 AM	08/12/2007 00:00 AM	tbc	Paekakariki Surf Lifeguards	Paekakariki Beach	
08/03/2009 00:00 AM	08/03/2009 00:00 AM	tbc	Paekakariki Surf Lifeguards	Raumati Beach	
24/02/2008 00:00 AM	24/02/2008 00:00 AM	tbc	Paekakariki Surf Lifeguards	Paekakariki	
20/01/2008 00:00 AM	20/01/2008 00:00 AM	tbc	Paekakariki Surf Lifeguards	Paekakariki Beach	
28/02/2010 00:00 AM	28/02/2010 00:00 AM	tbc	Paekakariki Surf Lifeguards	Raumati Beach	

Members that are not Club Administrators will not have the "Club Administration" tab at the top.

Club Administrator Portal:

The Club Administrator will enter the portal using the same log in process as the self-service portal but they will have an extra Club Administration tab at the top to manage the club data. Club Administrators will have the following functions:

- View and edit club member and family details, create new members
- Edit club details
- Create, view and edit club patrols
- View contact information for other clubs
- View member awards
- Manage club member subscriptions
- Manage Administrators profile
- Extract basic membership and patrol reports



Patrol App:

We are currently developing a phone and tablet app for inputting patrol data from the beach. This will enable patrol captains to update patrol information from their phone directly into the database. This is in development and we will bring more detail in the next update.

PAM CRM:

The main database will contain all of the member, club and patrol information. This will be able to be exported to excel and different views can be used to provide instant statistical updates. There are functions that enable an administrator to send emails to groups and store these in the system for the future. Clubs will also be able to manage the club subscriptions and in future link this to financial systems.

PAM Functionality:

- View and edit club member and family details, create new members
- Edit club details
- Create, view and edit club patrols
- View contact information for other clubs
- View member awards
- Manage club member subscriptions
- Manage Administrators profile
- Extract basic membership and patrol reports
- Send emails to groups
- Set up patrol teams for the season and have auto reminders for lifeguards
- Set up family groups to help manage communications and subscriptions.

Questions and comments:

If you have any questions or comments please contact Georgia McLaren.

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