PAM Database - Newsletter #10   **November 2016**

Project Update:

The new PAM is now entering its second season and we have a much better understanding of how it works and many clubs have good systems in place for how they use this. We are continuing to iron out any bugs and are looking at ways to make this easier to use - the feedback we have received in the past 12 months has been extremely helpful. Thanks to everyone that has given feedback and feel free to keep this coming in.

We are currently working on some fix ups in the system and have had funding from Infinity to develop an online booking system that links to the database.

Good luck putting your patrol data into PAM, please let us know if you have any questions about this.

Administrator Workshops:

Thanks again to everyone who has attended one of our club administrator workshops. We have just about wrapped these up with a couple of areas to go. It's been great to see how everyone has progressed over the last 12 months with the system and to see plenty of you sharing information and helping each other out.

Tablets:

When we were testing different tablets, this type was the one that we found the most compatible with both the Portal and the CRM systems. Many of you will have received your tablets by now and have thought about how your club plans to use them this season. These aren't indestructible and will require some looking after. If you haven't received yours yet it won't be too far away.

You can contact Georgia if you require any help with your tablet (logging in, trouble shooting, etc) and check out **Appendix 1** for more information about the warranty of these.

Patrol and Incident forms:

You may have noticed that significant changes have been made to both the patrol captain forms, incident forms and the equivalent sections in the database. These changes have been made based on feedback that we received last season and the forms have been designed be better aligned with the layout of the database.

Please refer to the Tip of the Week section below for a few user tricks in this section.

Awards:

Bulk Import

As mentioned in an earlier email, we now have the ability to bulk import awards! Last week I successfully imported over one hundred 200m Safety Badges for various clubs. This function is now available to all clubs for the remainder of the season. Please refer to the original email for what I need from you to complete this or email me (Georgia).

Active Members

Our regional admins would appreciate it if members who attend courses or refreshers were made active in the database. This makes the process of loading their award into the database quicker if they don't have to go searching for inactive memberships.

Tip of the Week:

Keyboard Shortcuts…

The design of the CRM often requires us to 'create new records' – to do this, new screens will jump open for us to input information, save and then close.

A good example of this is when we have a Patrol Occurrence open and we click the plus sign to add a Patrol Attendance. The Patrol Attendance screen opens and you select who the member was on patrol and what hours they attended then you save and close. See below for a few keyboard shortcuts to make this process faster for you:

- **Ctrl + S = save** (hold down the control (or command on a Mac) button and the S button at the same time). This will save the new record for you.
- **Ctrl + F4 = close screen** (hold down both of these buttons to close the screen you are finished with, i.e. the patrol attendance)
- **Tab** – use the tab button to scroll through the fields on the page to minimise clicks.

Print Preview – giving credit to Waikanae database user Gary for this one…

Who knew – we can print selected pages from the CRM! The CRM is great for building reports that we need (selecting our own columns and what we want to filter by) however, let's say we've got a Membership Application open in the CRM and we want to export the whole page to take it to a committee meeting (example), we can click the cog icon in the top right hand corner of the page and select 'Print Preview'. This allows us to print all of the information captured on the page!

Frequently Asked Questions:

I've added a 200m badge in the database but EnterNOW is still giving me a warning message!

Remember there is a delay between the two systems – if you add a 200m in CRM/Portal it won't show up in EnterNOW straight away. The two systems complete a sync of **all** updates and changes at midnight every night and should run an update of minor changes every 15 minutes. Alternatively you can contact your regional sport coordinator or the database admin to request a manual sync.

Additional Help:

Over the past 12 months we have had assistance from many members that has provided valuable learning about the new PAM. We would like to thank everyone who has contributed to this and invite you to keep the information coming in. If you have any issues or ideas about PAM please send this through to me.

Regards,
Georgia McLaren (SLSNZ Database Administrator)