



PAM Database - Newsletter #14

November 2018

Welcome to the first Database Newsletter for 2018/2019. We know some of you have been back into it for a while now and for some of you it may feel like it never stopped! Thanks to everyone who attended a Club Administrator Workshop this season, they were very productive and it was nice to see a variety of club representatives in each area.

We have a handful of items which have been in development which are now LIVE and you will find a more detailed description of these highlighted below:

Portal Log Ins:

Many clubs have expressed an interest in setting their club members up with access to the SLSNZ Member Portal. Clubs can now send out bulk email invitations to members to set this up themselves, or they can manually set up and manage the details.

You will need CRM access for this. Go to MEMBERSHIP > Contacts.

Dropdown the menu where 'Active Contacts' is displayed. Select either of the following (depends on how many club members you want to capture, i.e. just your lifeguards or all club members):

- Portal Invitations | All Active Club Members
- Portal Invitations | All Active Lifeguards

Tick as many people on one page as you want to invite to the Portal and select 'Run Workflow', tick 'Contact: Bulk Send Portal Invitation and click 'Add'.

Process Name	Category	Created On	Mod	
ADX Sign In Password Recovery	Workflow	4/02/2015 3:42 ...	13/07/	
<input checked="" type="checkbox"/> Contact : Bulk Send Portal Invitation	Workflow	21/07/2015 12:1...	13/07/	
Contact - Create Family	Workflow	24/04/2015 9:03...	13/07/	
Upgrade Contact Invitation	Workflow	4/02/2015 3:42 ...	13/07/	
Contact - Set Competition Category	Workflow	6/05/2015 3:20 ...	13/07/	

A detailed [User Guide](#) for this process is available on the [Database Page](#) on our website now. Get in touch if you need any help.



Certificates:

Certificates for SLSNZ qualifications will now be emailed to members when they successfully complete a course. These will still be processed by the National/Regional admins but will be sent to the email address specified in the CRM database rather than by post. Another great reason to ensure that email addresses are up to date!

Online Learning System:

Surf Life Saving New Zealand released the new Online Learning System last month and are working with regional staff to ensure that the Refresher Courses (to start with), are set up and ready for clubs.

If you require more information about this, head to the [Online Learning Portal](#) page on our website. Here you will find a link to the Portal, instructional videos for logging in and completing the test, written user guides and a series of FAQ's.

The first port of call if you need help is member.education@surflifesaving.org.nz.



User Guides:

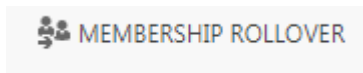
Everything you need to know about the CRM is on the [PAM Page](#) on our website. User guides for the CRM, Portal and Course Booking System can be found on this page. Some user guides are in the process of being updated to reflect recent changes. We appreciate your patience while these are being updated.



Recent System Changes:

Membership

Membership Rollover Button (CRM) – no need to navigate to the 'Run Workflow' button any longer. Now it's as simple as one click of a button – called 'Membership Rollover'. Found in the list of commands when a membership (or multiple) is selected:



Contact Record Update (CRM) – a few extra fields to give you an extra snapshot into the membership held by the member without having to navigate to the Membership section:

Details	
Full Name *	Georgia McLaren
Title	Miss
Role *	SLSNZ Member
Primary Club	Titahi Bay SLSC
Primary Membership +	Georgia McLaren - 69233
Membership Details	
Club Membership Sta	Titahi Bay SLSC - Open Female
Year of Last Members	2018/2019
Rollover Date	--

Patrolling

Patrol Occurrences – changes to the Patrol Status (CRM):

Draft – work in progress.

Ready to Project – use when you are setting up your teams and want to project all of the team members onto the Patrol Occurrences.

Planned – patrols are planned and ready to go.

Started – have PC's change their patrol to this when patrol commences for the day.

Ended - have PC's change their patrol to this when patrol wraps up.

Complete – patrol is over, members have been selected and observations complete.





The system will only let you change the Patrol Status to 'Complete' once you have ticked both of the following boxes:

All Attendance Updated **No**
 Observations Complete **No**

These changes have also been made in the Portal:

Patrol Status

Planned

All Attendance Updated
 No Yes

Observations Complete
 No Yes

Patrol Occurrences – changes to Headcounts (CRM):

Now, instead of having to click on each hourly record in the Patrol Occurrence, you just need to enter the hour and minute from the drop-down list. Enter the beach and water counts and click "Ctrl + S" (to save). The headcount record will now display under the Headcounts section and the fields (see below) will be clear, ready for the next entry.

Headcount

Spot H/C Hour --

Spot H/C Minute --

Spot Beach Count --

Spot Water Count --

Time of last Headcount 22/04/2019 7:00 p.m.

Patrol Occurrences – Incidents (CRM):

Don't forget to log all incidents against the Patrol Occurrence. Click the '+' icon on the right-hand side to add a new incident.

[Incidents](#)

Club ↑	Incident Level	Incident Date ↑	Time Started	Tasking Event No	Involved Rescue	Involved First Aid	Involved Search	Created On
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No Incident records found.





Notification Emails - are now sent directly to the National Lifesaving Manager and Medical Director when clubs tick the 'Methoxyflurane' box under Resources, or if they specify that the Incident Level was either an S0 or S1. These will be followed up with.

Patient Records

Not a new feature as such but remember to tick the 'SLSNZ Member' box on the Patient record form so that we can follow up any serious incidents where a member is the patient!

SLSNZ Member	<input checked="" type="checkbox"/>
SLSNZ ID Number	--
Contact	Georgia McLaren

Patrol Teams

If you need assistance setting up your patrol teams and projecting all of the members to the patrol occurrences, please get in touch.

What's In Development?

Send Direct Email – from the CRM to contacts. This isn't a function we have been using but, with more and more clubs wanting to use one central database for emails out, we are familiarising ourselves with the ins and outs of this before we can provide instructions for use.

PDF Certificates – which would be available in a member's Portal. SLSNZ would no longer send a copy of the certificate via email or post, instead it would be available for download from the Portal.

Security

If you have had change in personnel at your club and you wish to check who has admin access to the Portal, please get in touch and we can provide this information. Remember, each club only has the one log in to the CRM so a system reset is required if this needs to be changed.



Trading Post:

The [SLSNZ Trading Post](#) is now live – members and clubs can now list items for sale and request items wanted. Click the link for the [Trading Post User Guide](#).

EnterNOW

With various sports events coming up you will need to start rolling over your inactive members to make them **active** again.

Please remember that there is a delay between the CRM and EnterNOW (i.e. names will not populate immediately after you have rolled them over).



Kind Regards,
Georgia McLaren (SLSNZ Database Administrator)