

SLSQ Junior Activities Gap Calculator

Date: 01 February 2023- Update
Document Title: Junior Activities Gap Calculator Procedure
Document Author: Membership Services
Version Control: Procedure for JA Gap Calculator V3.0 (Jan 2023)

Overview:

The following document details the standard operating procedure for the Junior Activity Gap Calculator. Please note, you cannot add columns or reformat the model as it is password protected. If you inadvertently corrupt the model, a master copy is maintained by SLSQ.

Step 1: Enter Junior Teams into Surfguard as Patrol Teams

In Surfguard Create Junior Patrol Teams:

Menu > Patrols > Add a Patrol Team (enter team) > Save

Add the following teams:

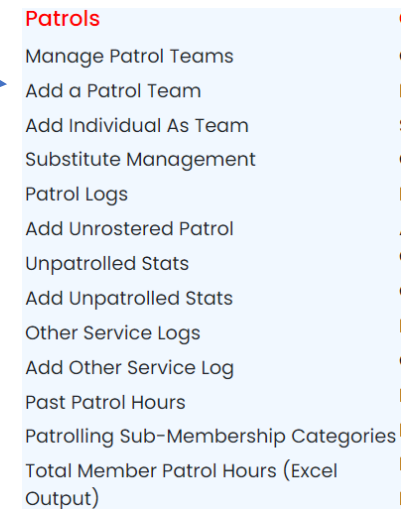
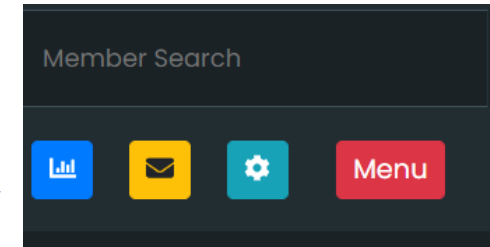
- Z.Junior Age Managers
- Z.Junior Coaching
- Z.Junior Committee and Support
- Z.Junior Water Safety & Evaluations

Team Position: When assigning members to a team, enter member into Member Position (see step 2 and 2A)

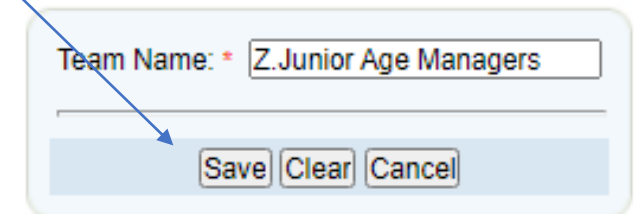


A screenshot of a dropdown menu in a software interface. The word "Member" is displayed in the center of the dropdown, with a small arrow pointing down to the right. The dropdown is light blue and has a white border.

Suggestion: Assign members into teams immediately after entering Team Name (see step 2 and 2A)



Add a Patrol Team



A screenshot of the "Add a Patrol Team" form. It has a light blue background. At the top, it says "Team Name: *" followed by a text input field containing "Z.Junior Age Managers". Below the input field is a horizontal line. At the bottom, there are three buttons: "Save", "Clear", and "Cancel".

Step 2: Assign Members to the Junior Teams

Assign members to the Junior teams based on roles:

- a) Assign Member as soon as team is created > **Assign Members to Team**
- or
- b) Go to **Menu > Patrols > Manage Patrol Teams > Members > Add Team Members**

Assign members to the following teams (see step 2A for Patrol Team Positions):

- Z.Junior Age Managers
- Z.Junior Coaching
- Z.Junior Committee and Support
- Z.Junior Water Safety & Evaluations

Note: You may need to allow other membership categories to be entered to patrol teams eg Associates.

Surfguard Menu > Patrols > Patrolling Sub-Membership Categories > Add Sub-Membership Category

Add Patrol Team

Z.Junior Age Manager has been successfully inserted.

[Assign Members to Team]
 [Assign Dates/Times to Team]
 [Back to Team List]

Patrols

- Manage Patrol Teams
- Add a Patrol Team
- Add Individual As Team
- Substitute Management
- Patrol Logs
- Add Unrostered Patrol
- Unpatrolled Stats
- Add Unpatrolled Stats
- Other Service Logs
- Add Other Service Log
- Past Patrol Hours
- Patrolling Sub-Membership Categories
- Total Member Patrol Hours (Excel Output)

Z.Junior Age Manager	Edit Delete	Members Roster
Z.Junior Age Managers	Edit Delete	Members Roster
Z.Junior Coaching	Edit Delete	Members Roster
Z.Junior Committee and Support	Edit Delete	Members Roster
Z.Junior Water safety and Evaluations	Edit Delete	Members Roster

Patrols

- Manage Patrol Teams
- Add a Patrol Team
- Add Individual As Team
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- Total Member Patrol Hours (Excel Output)

Patrolling Sub-Membership Categories @ Kurrawa

Sub-Membership Category: Associate

Sub-Membership Category	Actions
Probationary	Delete
Junior Activity Member (5-13 years)	Delete
Cadet Member (13-15 years)	Delete
Active (15-18 yrs)	Delete
Active (18yrs and over)	Delete
Award Member	Delete
Reserve Active	Delete
Long Service	Delete
Past Active	Delete
Associate	Delete
Life Member	Delete
General	Delete
Honorary	Delete
Non Member Participants	Delete

Team Members - Z.Junior Age Manager @ Mermaid Beach

There is no one allocated to this Patrol Team.

Add Team Members View Team Roster Back to Teams List

[Details of Patrol Positions and Awards]

Step 2A: Assign Members to the Junior Teams

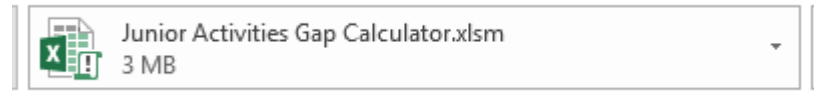
Assign members to Junior Teams into Member Position based on member role:

Note: If a club does not have members allocated to a position leave the team. *Leave the team in surfguard

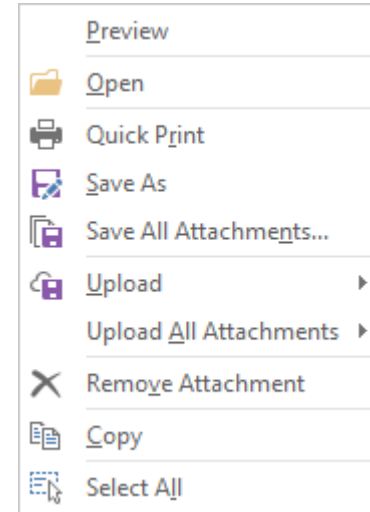
<p>Z.Junior Age Managers</p> <ul style="list-style-type: none"> • Age Managers • Assistant Age Managers 	<p>Z.Junior Committee and Support</p> <ul style="list-style-type: none"> • JAC • Vice JAC • Secretary • Treasurer • Registrar • Assistant Registrar • Club Admin • MPIO • Club Photographer • Team Managers • Gear Steward • BBQ Coordinator • Awards / Education Coordinator • Fundraising Coordinator • Publicity Officer • Parent Reps
<p>Z.Junior Coaches</p> <ul style="list-style-type: none"> • Coaches • Assistant Coaches 	
<p>Z.Junior Water Safety & Evaluations</p> <ul style="list-style-type: none"> • Chief Water Safety • Assistant Chief Water Safety • JAAO • NAA • Junior Water Safety Personnel 	

Step 3: Running the JA Gap Calculator

➤ **Save** all attachments from email (Do not Open files – **Right Click** on a file and select **Save All Attachments**)



- Junior Activities Gap Calculator V3.0 (Jan 2023).xlsxm
must be saved as Microsoft Excel Macro-Enabled Worksheet (.xlsm)
- Junior Activities Calculator Report Template V3.0 (Jan 2023).xml
(file can only be read when uploaded to report field in surfguard)
- JA Gap Calculator Instructions V3.0 (Jan 2023)

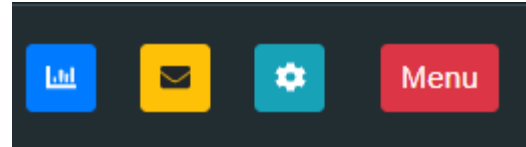


IMPORTANT INFORMATION:

1. SLSQ have created a profile **Sir PGC Test Member** and a Patrol Team **Z.SLSQ PGC – DO NOT REMOVE** and added the member and the patrol team to each SLSQ Club – This is to be included in all reports for the PGC to work.
2. **DO NOT** Archive or Transfer or Alter or remove from patrol team

Step 4: Log into Surfguard and complete the following steps.

- Run a Custom Report



Menu > Reports > Custom Reports

Reports

- Audits
- Assessment, Award & License Reports
- Member Reports
- Organisational Management Reports
- Patrol Reports
- Transfer Reports
- Custom Reports
- New Custom Report
- Gear & Equipment Custom Reports
- New Gear & Equipment Custom Report

Custom Reports @ Mermaid Beach

- Click **“Choose File”** and upload the previously saved file: **“Junior Activities Calculator Report Template V3.0 (Jan 2023).xml”** click open and once selected click **“Go”**

Load Saved Template: No file chosen

OR

Load Saved Template: Junior Revi...ct 2021).xml

OR

Step 5: Update Report Fields

➤ Registered for Season:

Ensure that you update the 'Registered for Season' to the **current** season. (eg this season 2022/23 you enter 2022)

Note: When conducting first PGC prior to start of season you may leave the season date blank

➤ Patrol Teams:

Highlight all Relevant Junior Activities Teams:

Z.Junior Age Managers

Z.Junior Coaching

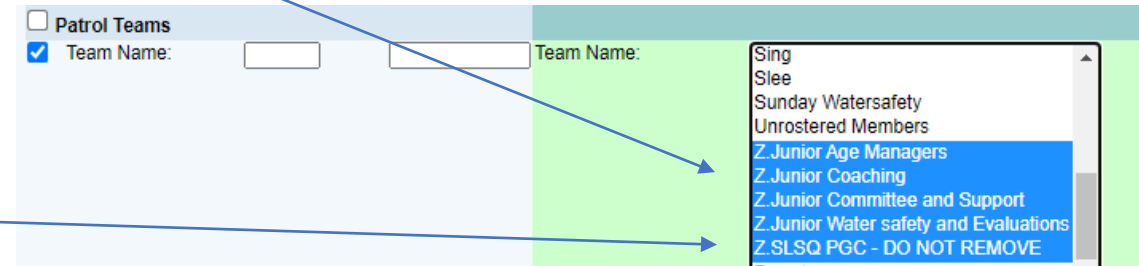
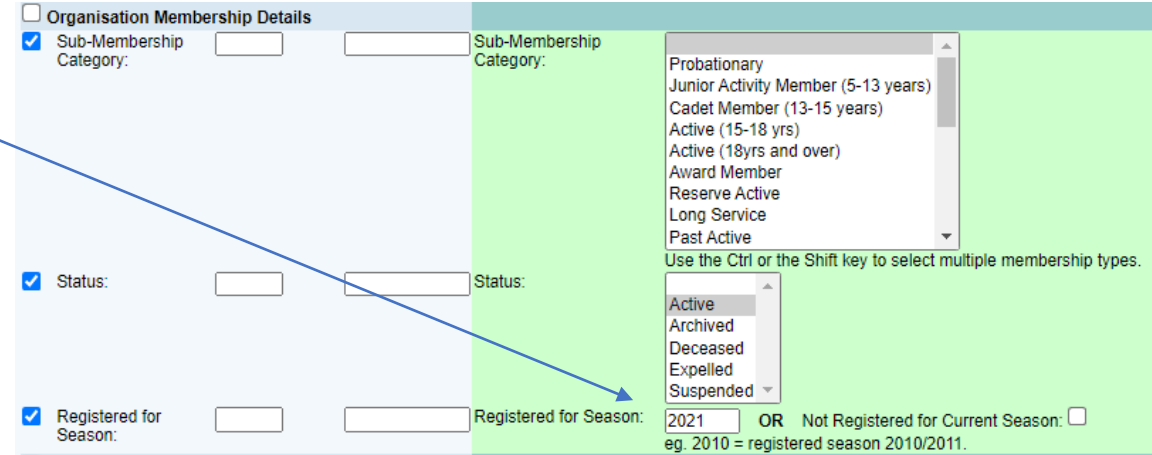
Z.Junior Committee and Support

Z.Junior Water Safety & Evaluations

Z.SLSQ PGC - DO NOT REMOVE

IMPORTANT: You must include –Z.SLSQ PGC – DO NOT REMOVE

This patrol team MUST have Sir PGC Test member allocated to the patrol team.



Step 6: Run the Report

- Scroll to the bottom of the page and select **“Display Report Here”** and the select **“Download as CSV”**

Enter the mode of delivery:

Display Report Here:

Send Report Via Surfguard Message:

Send Report Via Email: Send to Email:
Enter multiple email addresses separated with commas. **Do not include blank email addresses.**

Recurring Type: Recurring Interval: eg. Weekly Recurring Interval of 2 = report to run once every 2 weeks.

Scheduled Date: (dd/mm/yyyy) Time (24hr): :
Leave scheduled date/time blank to schedule immediately.

Report Name:

Display Type: HTML Downloadable CSV (Excel Format) Delimited Text File

Records Per Page: Delimiter: or Tab:

Create Template:

- Click on the **“Display Report”** and custom report link will open in new TAB.
Note: this may take some time dependent on your clubs size.

- Click - **Please click here to download result file.**

Template:
[Please right mouse click here to save the template file.](#) Then, select **Save Target As** to save the template anywhere on your computer. Please use .xml as your file extension.

Selection Criteria:
Status = Active, Organisation Type = SLS Organisation, Other SLS Organisation, Award Name = Advanced Resuscitation Techniques, Advanced Resuscitation Techniques [AID], Bronze Medallion, Certificate II in Public Safety (Aquatic Rescue) (PUA20119), Certificate II in Public Safety (Aquatic Rescue) (PUA21004), Certificate II in Public Safety (Aquatic Rescue) (PUA21010), Certificate II in Public Safety (Aquatic Rescue) (PUA21012), Child and Youth Risk Management Strategies, First Aid, First Aid [AID], IRB Crew Certificate, Marine Stinger Management, Observers Award, QLD 4WD Induction, QLD SSV Operator Induction, QLD Tractor Induction, Radio Operator Certificate, Resuscitation, Resuscitation [AID], Safeguarding Children and Young People Awareness, Silver Medallion Beach Management, Silver Medallion IRB Driver, SSV Operator Induction, Surf Rescue Certificate (CPR Endorsed), Youth News = Patrol 05, Patrol 06, Patrol 07, Patrol 08, Patrol 09, Patrol 10, Patrol 11, Patrol 12, Z.SLSQ PGC - DO NOT REMOVE.

Total Records:
885

[Please click here to download result file](#)

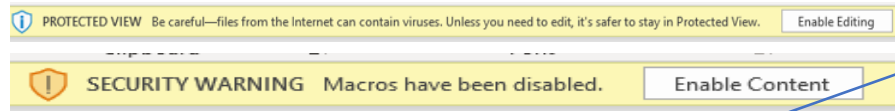
Step 7: Copy data to JA Gap Calculator

- **CSV File :**
Copy all data under headings (Columns A6 – Z6 / Rows
Include all rows with data)

Member ID	First Name	Last Name	Gender	Date of Birth	Age	Mobile	PH	Email	Add Email	Add Drivers Lic	Drivers Lic	Sub-Mem	Status	Season	Working v	Screening	Screening	Award All	Award Na	Award Ab	Award Co	Award Da	Proficienc	Award Ex	Team	Nan	Organisation	Type
5987876	PGC	Test Mem	Indetermi	#####	25	'04221224'	slsq@lifesaving.com	123456	Car	Probation	Active	2021/2022						Award	Age Manager - Online Theory	#####	#####	#####	#####	#####	#####	Z.SLSQ PG SLS Organisation		

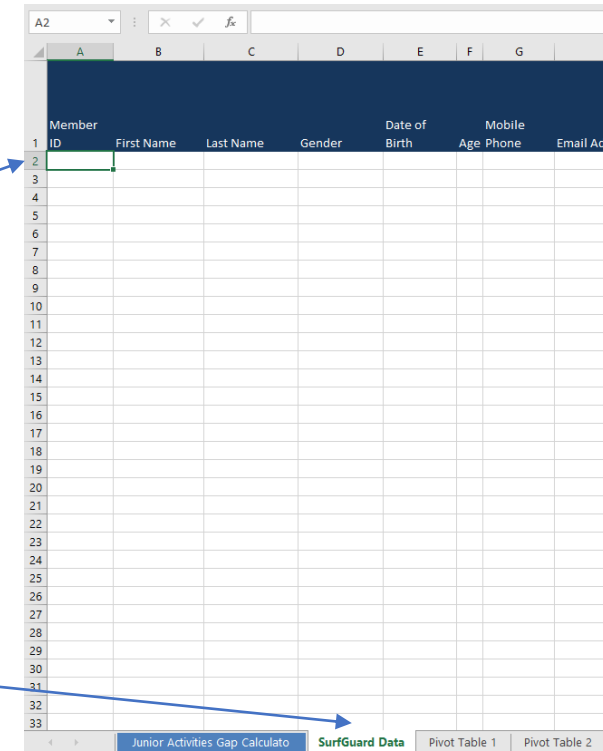
- **Open Junior Activities Gap Calculator V3.0 (Jan 2023).xlsx** on your desktop

- Click Enable Editing
- Enable any Macros



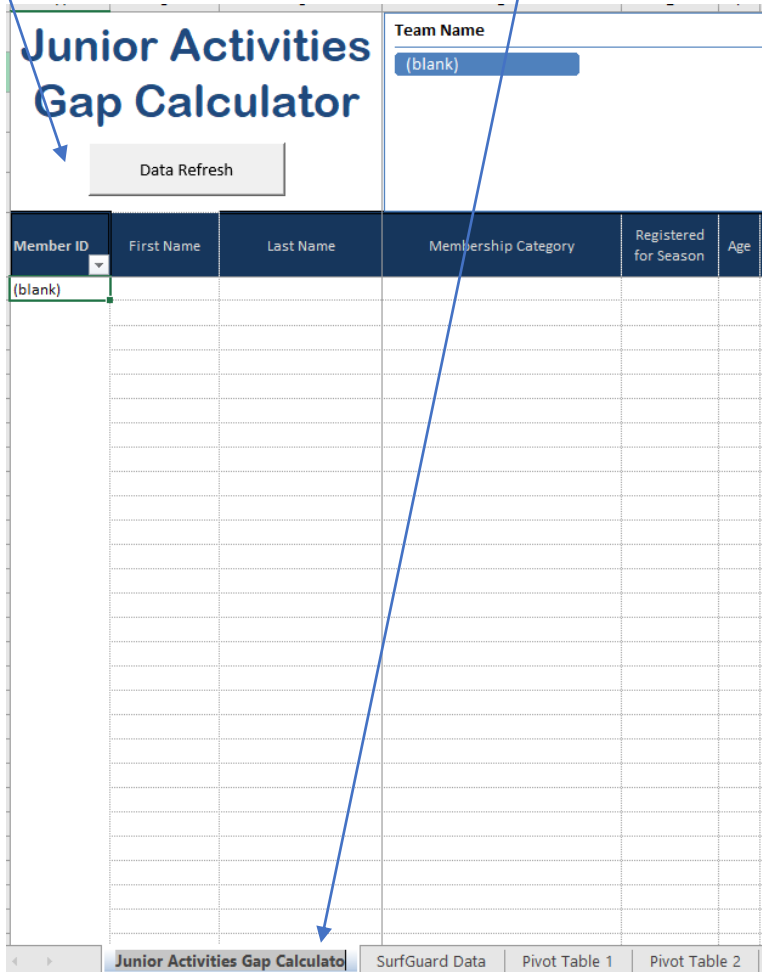
MACRO's - For more information on enabling Macros – [Click HERE](#)

- Click on the second tab “Surfguard Data” and Paste data in cell “A2”



Step 8: Import Data

- Go to first Tab “**Junior Activities Gap Calculator**” and Click ‘**Data Refresh**’ button.



The screenshot shows the 'Junior Activities Gap Calculator' interface. A blue arrow points to the 'Data Refresh' button. Another blue arrow points to the 'Team Name' dropdown menu, which currently shows '(blank)'. Below the header is a table with the following columns: Member ID, First Name, Last Name, Membership Category, Registered for Season, and Age. The first row is currently blank.

Member ID	First Name	Last Name	Membership Category	Registered for Season	Age
(blank)					

- Select the Team Name you wish to review (you can select multiple teams)



The screenshot shows the 'Junior Activities Gap Calculator' interface. A blue arrow points to the 'Team Name' dropdown menu, which now displays several team names: 'Z.Junior Age Manag...', 'Z.Junior Committe...', 'Z.Junior Water Safe...', and 'Z.SLSQ PGC - DO N...'. Below the header is a table with the following columns: Member ID, First Name, Last Name, Membership Category, Registered for Season, Age, Email, and Mobile. The first row is currently blank.

Member ID	First Name	Last Name	Membership Category	Registered for Season	Age	Email	Mobile	
(blank)								
5987876		PGC	Test Member	Probationary	2021/2022	25	slsq@lifesaving.com.au	'0422122456