Welcome to the Canadian Coast Guard Auxiliary Quebec Sar Management System

This presentation will give you a high-level overview of the system.

After watching this presentation, to get started using the system - consult the on-line help and attend one or more training sessions specific to your area.

The tools available within the system are different depending on user security - so screen shots displayed in this presentation may differ slightly from what you normally see.

The SAR Management System has been designed to cover all aspects of marine SAR using a flexible architecture that can be adapted over-time to address new policies and processes.

The system is capable of tracking all units, vessels, people, training, missions, requests, and all associated data even down to individual personnel crew log items. As data is entered in the system - numerous reports can be generated that summarize all these items to provide extensive statistics at the individual, unit, and regional levels.

Much of the nomenclature used throughout the system can be controlled by system administrators - thus allowing the system to adapt to individual organizations and to changes in policies over time.

Administrators control this system nomenclature using dictionaries - these are tables of items such as 'Training Types', 'Personnel Positions', 'Vessel Types' and so on. All these dictionaries must be configured before the system is put into production.

The overall structure starts at a regional level - regions are broken down into zones, and then units.

Each Unit is composed of personnel and vessels. The management of people and vessels within a unit is under the control that unit. All of this is dependent on the security access associated with the member's login to the main web site.

When a member logs into the web site, the system knows what unit they belong to and will give them access to information for that unit and their own profile and reports.

Most of the stats displayed for a member are created automatically by the system based on the Training, Classroom, and Mission reports that are entered by coxswains and unit officers. Therefore, most crew members need only log achievements (such as training) that occur outside the organization in order to have them show up in their log.

Coxswains will need to input training and SAR mission reports in the system. The on-line forms are designed to completely replace paper forms and will dramatically simplify

data-entry at a regional level and should speed the process of report authorization and reimbursement where applicable. The submitted forms are also validated - providing immediate feedback to the person creating the form in case of a mistake.

Since the system knows which unit any member belongs to - it can automatically enter that portion of the form. The remaining items are available from drop-down selections wherever possible. Any items involving calculations (such as total times for example) are computed automatically by the system and need not be entered.

One of the more exciting features of the system is the integrated charting module. This module allows various graphical charts to be added by administrators - members can then pin-point lat/Long coordinates required on some forms simply by clicking on the chart. At the same time - all incident locations and vessel base locations can be plotted on these charts in reports.

As soon as forms such as training or a mission are submitted the logs for each of the personnel involved automatically begin to show their participation and their individual stats are also immediately updated. The entire process uses a new authorization workflow to replace the paper signatures. These new digital signatures are all tracked in a secure audit trail maintained for each report in the system.

At both the unit and regional level all this information is summarized into overview reports that give stats for various time periods. All of which, again, are updated automatically as soon as report forms are input.

The system also manages request forms and expense claims providing a single web-accessible database for the entire region that manages all aspects of operations.

The SAR Management system is an extensive tracking tool. It was developed by PawPrint.net as a component module in their eXtensible Database Environment and represents over 18,000 lines of code and close to 200 hours of development time. Many members of the Canadian Coast Guard Auxiliary - Pacific have contributed to the design process through participating in beta-tests and process flow discussions - but the best part is that the module will continue to grow. As new features are identified the module will continue to be enhanced with the single goal of reducing "paperwork" time for everyone and providing the best possible tracking of SAR operations.

Again, this is just a high-level overview. To get started using the system - consult the on-line help - There are written overviews with links to specific topics for various positions at the unit and regional levels that should guide you through those areas that you need to know.

SAR Options

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The options for the SAR System, as defined in the XDe standard administrative options area.

SAR System Options

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The Global site options for the SAR system control general behaviour and defaults for the system.

SAR Notification Emails From Email Address

When the SAR system sends email notifications - this is the "From" email address that will be used.
See also: [options_SAR_from-name](#)

SAR Notification Emails From Name

When the SAR system sends email notifications - this is the "From" name that will be used.
See also: [options_SAR_from-email](#)

SAR Main Menu Header

This option allows an introductory content block to be included on the main menu page of the SAR system. The administrator can choose if the content included should be interpreted as bbText, XHTML, or plain text.
See also: [bbtext](#) [xhtml](#)

SAR Module Title

This is the title of the SAR system for this web site and is displayed at the top of pages within the SAR system

Recommended SAR Training Hours

The minimum number of hours (per month) that individual personell should train. This value is computed and displayed on several of the training reports for the time periods in question.

The default is 1.667 = 20 hours/year.
See also: SAR_training

SAR Workflows

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Workflows defining the SAR authorization process for reports and requests. Selections are taken from the SAR Authorization Levels already defined by administrators in the system. The maximum number of steps in the workflow being limited by the number of levels that have been defined.
See also: SAR_authorization_level

SAR Classroom Session Report Workflow

The steps required for the SAR classroom session report Workflow

SAR Incident Report Workflow

The steps required for the SAR Incident Workflow
See also: SAR_incident

SAR Training Report Workflow

The steps required for the SAR Training report workflow
See also: SAR_training

SAR System Overview

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The SAR Management System is designed to manage and track all aspects of a typical SAR operation in a signle web accessable database. Site administrators configure much of the nomenclature used in the system, split the geographical region covered into regions and zones, and then define units within those zones. Individual members are added to the system who can then expand upon the details tracked at the unit level. Vessel coxswains then input reports to log both training and mission activitiy which crew members can view in their automatically created logs.

There are other features like request forms, a built in authorization system, many reports, and crew achievement logging - these will be covered in their respective toipics.

While this topic endevours to explain the basic operation of the module at a high level - members at various levels should view the help topics listed that relate to their needs within the system based on their job-function.

Structure & Access

The module consists of a single database and is linked to the other modules of the web site. User security and login is handled through the normal XDe login process. Security assignment and access is all related to the member´s site-wide security. There are several unit-level controls for security including if a members is premitted to submit training, incident, and classroom reports.

The system nomenclature must be defined by administrators *before* units and members can start inputting data - this is generally complete prior to site-launch. Administrators can update definitions (most of the items that appear in lists and drop-down boxes) at any time - but as with any record based system, careful thought is required before doing so because of the potential effects on historic data records and reports.

In the SAR system much of the reporting and stats stem from the various reports that are filed. Thus, when a coxswain fills out a SAR mission/incident report the stats for their unit, the zone, the region, and all crew involved are automatically updated by the system.

Features

The system has a basic workflow engine that ensures authoriations are applied to reports, all reports are validated to ensure required data is complete, there are no duplicates, and that dates and entries make logical sense. There is a complete mapping system with uploadable maps that provides point-and-click lat/long selection as well as plots missions and vessels for reports. Finally there are many reports and different levels and for various time periods that summarize activity.

Key Points

As with any records system the key for good reporting lies in data quality. The phrase "garbage-in = garbage-out" truly applies. Thus it is critical that reports are filled out accurately and that administrators give careful throught to nomenclature definitions - especially in selection lists - to ensure that redundancy is minimized and that the resulting reports will be valuable and valid.

.. for more information view the help topics related to the areas of interest.
See also: xde

SAR System Overview for Coxswains

At the coxswain level the system carries a few more responsibilities. Coxswains are responsible for filling out Training and Incident/Mission reporting forms in adition to using the system for reporting like crew.

After returning form a training exercise or SAR mission the coxswain should complete the approperiate form (which, if their access is correctly configured will be available to them both from the SAR navigation menu as well as the "SAR Administration Tools" at the top of every page.

Help filling out each of the forms is available from the associated topics (see below).

Once complete the form needs to be submitted (by checking off a box at the bottom of the form) and finally it must be authorized by the coxswain. This is a digital equlivent to signing a paper form and will be recorded in the form´s history (an audit trail)

The report then proceeds through a pre-defined workflow for others in the organization to add authorizations. The form **may** be rejected, in which case the coxswain will receive an email indicating the reason and must correct the problem and re-submit the form.
See also: overview_crew SAR_incident SAR_training SAR_authorization

SAR System Overview for Crew

The SAR Management system from a crew perspective is mainly a report tool. You will be able to view the results of reports from Training, Classroom Sessions, and SAR Missions for your Unit and that you have participated in.

The only area you will want to look at yourself is the Log. Which allows you to view a chronological history of all your activity that has been recorded in the system. You can also make log entries corresponding to achievements that relate to your training, but that are not specifically related to the SAR Training Standards as recorded in the system.

If your account it configured correctly - you should see a box at the top of the main menu for the SAR System with your name, and that has links to your profile, your unit´s profile, your log, and various reports.

If you are a new crewmember, your log will probably be empty. It will grow as each new training/classroom/incident report is filed and as youre training items are signed off. All of that happens automatically - but it should be of interest to you to check back from time to time and monitor your progress.

Some of the other topics below will provide more detail about the various reports and summary information available to you.
See also: [reports_person_profile](#) [reports_unit_overview](#) [SAR_person_signoff](#)

SAR System Overview for Trainers

Members in charge of training at either the unit level or higher have several additional responsibilities. The system has a complete tracking system for member training including the *Training Levels* which can be used in conjunction with *Training Items* to define training standards and track users progress through the various levels.

There are several reports that assist with this process:

- Training Summary
- Training Pulse
- Training Grid

Each of these reports serves a specific purpose and should help members in a training role track people´s progress and focus their efforts on the areas of the greatest need.

Trainers should check the **training grid** frequently to ensure that all members have their approperiate training items signed-off. Once a member has completed all the items in a training level the trainer should make a log entry for that person indicating that they have

Acheived the training level. Only someone with trainer access can do this.

Trainers will also frequently be responsible for submitting *Classroom Session Reports* to indicate attendance for personel in clasroom training sessions. See the help topic about the classroom session form for more information.

If your access isn´t set correctly talk to the unit leader/manager who should have unit management access and can set the *Assign Training Levels* flag that will allow you to make these log entries for other people.
See also: SAR_person_signoff SAR_classroom

SAR System Overview for Unit Leaders

Unit Leaders have several management tasks within the SAR System. Because they will be managing their unit, and functioning as a crew/coxswain it is recommended that they first review the overviews for crew and coxswains. They may also wish to review the unit-trainer overview for a broader understanding.

The Unit leader/Managers should have full access to manage their unit. This comprises several tasks including:

- Adding/Editing Personel Records
- Adding/Updating Vessels
- Authorizing Forms
- Issuing Requests
- Reviewing Unit Reports

Unit Data

The most critical task to ensure that the SAR system will function is to ensure all personel and vessels are correctly accounted for in the system. Without accurate personel and vessel records coxswains will not be able to complete the training and/or incident forms.

The **Primary Task** for unit leaders/managers in the SAR System is to ensure all **personel** and **vessels** are accounted for.

For help with the personel or vessel form see the topic for the form in question.

Ongoing Management: Forms

Once all personel and vessels are listed in the system, coxswains and trainers will start entering training, classroom, and incident reports in the system. Unit Leaders/Managers will typically need to authorize these reports as part of the pre-set workflow. Each time a report is submitted by the person that created it, the Unit Leader/Manager will get an email notification and can then authorize the report. The option also exists to *reject* the report if there is an error, or if more information was required.

Once approved at the unit level, reports progress through their workflow until complete. The report is then marked *Closed* and the Unit Leader/Manager will receive an email indicating this.

Ongoing Management: Requests

There is now a single form that can be used to issue all sorts of requests. The web site administrators can configure different types of request that will request different information - but it all uses the same form. Requests for travel, training, special events, etc... are all issued in this manner. The system then follows a similar authorization process to track the progress of the request. Requests can be approved or not and if approved will specify the amount of money/time that has been approved.

Ongoing Management: Activities

Like requests, activity reports are configured by site admins and can record all manner of different activities. Special events, boating safety, admin time etc... are all reported in this manner. The system then follows the defined authorization process to track the progress of the report.

Ongoing Management: People & Vessels

As people and/or vessels come and go in the unit, the system records will need to be updated. In general if a vessel is decomissioned, transferred, or sold it is **NOT** deleted from the system; nor are personel records removed when people transfer or resign. Instead, they are marked inactive.

The is done so that all past reports and log entries can be maintained for that person and/or vessel. Usually, the only instance where a personel or vessel record would be deleted is if, by mistake, a duplicate record was created when first creating the record.

Reports:

The system has many reports that will be of interest to Unit Leaders/Managers. Reports

cover everything from general overviews to profiles of specific personel. The most useful reports for Unit Leaders/Managers are probably the summary reports for Training, Incidents, and Classroom Sessions. Most all reports are available for various time periods - typically: YTD (Year To Date), the pervious year, and one version that contains all recorded data.

See also: overview_crew overview_coxswain overview_trainers SAR_person SAR_vessel SAR_authorization

SAR System Reports

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There are **many** reports available from the system - view the topic relating to the specific report for more information.

SAR Person Profile

This is a general overview of the particular person´s history (a summary of all information recorded in the system)

If an ID photo has been uploaded that is displayed (if no ID photo has been uploaded by the user has submitted a profile portrait - that is shown instead)

COntact details are displayed from the site's user records (this allows members to update their own contact details) where SAR specific information is restricted to unit officers and SAR administrators.

SAR Unit Overview Report

The SAR Unit Overview report provides general information and stats for a single unit in the SAR system. Stats are computed for various durations and displayed in a tabular format.

This is degiend to be a general overview - with more specific reports available based on security settings.

SAR Vessel Map

This report shows the location of active SAR vessels plotted on a map (the map is automatically selected by the system based on the best available scale and area coverage for maps uploaded into the XDe Maps module)

Only active vessels what Lat/Long coordinates that have been entered are displayed.

SAR System

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The SAR System is a full function tracking database module for Marine Search and Rescue. It has the capeability to track an unlimited number of Regions, Zones, and Units within which are captured vessels and personel.

Once the supporting background data such as Units, their vessels (including vessel equipment and configuration) has been captured the system can be used to process requests and reports centering on training and missions across the region. Throughout the process a history and authorization process ensures that reports/requests are approved and records are maintained. At the same time individual personel logs are created automatically to provide metrics for individual member reporting.

Many reports are available from the regional all the way down to the individual personell member tracking everything from SAR missions and training hours to outside achievements.

The SAR system is linked to the base site security and can provide some reports "off-site" based on security key access.

For help with specific areas of the system view the associated topic. Several walk-through tutorials are available for typical tasks.
See also: [SAR_walkthrough](#)

Sar Activity Form

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The SAR activity report is a generic form that can be used for all manner of activities not already covered by the other reports. Site administrators create Activity Types that deturmine what information the report must contain. These reports are then run through the as authorization process as with other system forms. The specific steps necessary being defined by the Administrator when the Activity type is created.

SAR Activity Name

This is the name of the activity. If there was no specific "name" just use it to record a new for the activity that will assist in identifying the activity later from a list.

SAR Activity Number

Activity number can take three forms:

- **Auto-generated** where the system creates a number - in which case there is no field for user input or selection.
- **User Defined** where a blank field is provided and you can enter any number you would like
- **Request Approval Number** where you must choose a request approval number, thus linking the activity to a specific request. A drop down list is provided.

Administratiors may alkso choose to make the number for a specific type of activity either required or optional. In the case of a "required" number where it must match an approved request - if there is no approved request then the activity report will not be able to be submitted.

SAR Authorization

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The SAR Authorization form allows users with authorization access to authorize requests and/or reports via the SAR Authorization system.

Authorizations are stored both in the form´s history (which acts like an audit trail) and the form´s authorization record. Should the request or form be rejected the authorization record is deleted and the report/request is sent back to it´s creator for update - the history is **not** deleted.

Authorization Level

A SAR Authorization level corresponds to a administrator defined sign-off point in the authorization process. These typically relate to a person (or group of people) who need to review and sign-off a report or request before it can proceed on to the next group.

A pre-defined *workflow* of authorization levels is set for each type of report and request in the SAR system in the site options. Requests and reports then follow that workflow until the last authorization level has completed their signoff (using the authorization form) and the report/request is closed by the system
See also: options_SAR SAR_authorization

SAR Cert

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The ´Cert´ system is used for tracking training and competency certifications that may or may not have an expiration date. The system allows scanned copies of the documents to be included with the record in the database and provides a workflow to ensure that certs are properly recorded and signed-off at various levels within the organization.

The distinction between ´Certs´ and training ´Achievements´ is that certs require a formal sign-off and include documentation and the potential for an expiration whereas ´Achievements´ are only tracked within a person´s log.

Some training levels have associated certs that must be held by a person (not expired) in order for them to maintain that level. If a person's required cert expires the system will notify them and, in most cases, their unit and the office.
See also: [SAR_walkthrough_cert](#)

SAR Cert Issuing Agency

The Company,Agency,Instructor, etc that issued the cert. This is generally written on the cert document.

Examples
All Radio Licenses in Canada are issued by *Industry Canada*

SAR Cert Effective Date

The date from which the cert is Valid. This is usually the date of issue. The system will not allow a cert to be recorded with future date.

SAR Cert Images

Use these file attachment fields to attach scanned images of the actual certification documents wherever possible.

For more information about how to attaching images see the ´images´ link below.

Note
If you do not have a scanner - you can usually use a digital camera to capture a scan of the document(s). Some Tips:

- Do not use a flash.
- Hold the camera at least 1m away (zoom in rather then holding close)
- Take the image in a well lit room.
- Use a tripod to steady the camera if possible.
- Check the image before you send it - to be sure it is in focus.

See also: [images](#)

SAR Cert Instructions

Special instructions specific to this type of cert as specified by the site administrator.

SAR Cert Notes

Any notes, restrictions, etc associated with this cert.

If the cert has any important notes they should be recorded here.

SAR Cert Number

Some certifications have a number. If the document has a number it should be recorded in the 'Number' field.

If the administrator has specified that this cert type requires a number then you will not be able to complete the cert form until a number is specified. (the number box will be red if it is required)

SAR Cert Person

The person for whom the cert is being recorded. This can not be changed on the form.

SAR Cert Recorded By

The person that initially created the cert record. This will usually be the person for whom the cert is being recorded but may be someone else. This can not be changed on the form and is displayed for information only.

Classroom Session Report

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10.<u>unit</u>   <u>Classroom Session Unit(s)</u>

The classroom session report form provides a means of tracking time spent training off the water. It is very similar to on-water training but no vessel or conditions are included.

Data captured from this form also appears in personell logs and in various training reports.

Once the form as been completed it is submitted and then proceeds through an authorization process. Once submitted only administrators can edit the form unless it is rejected during the authorization process. Therefore, please ensure all information on the form is complete and accurate before checking off the mark complete box.
See also: <u>SAR_authorization</u>

Classroom Session Achievement

Use the achievement selection when a classroom report relates to the completion of some achievement and all personnel that attended the session are to be credited with the achievement.

When the classroom report is closed (ie: when it completes all authorizations) every person listed will be credited with the achievement selected.

Classroom Session Description

Details of the class. Describe what specifically was covered during the session.

Classroom Session End Date/Time

The date and time that the class ended.

Classroom Session Instructor

The name of the person that led the class should be specified here. By default, the person filling out the form will be placed in the field, however if they didn't lead the class they should specify whomever did. This field does not validate agains the personel list for any of the units - so an outside instructor's name can be entered where applicable.

Training Report Name

A name or title for this report - used mainly to identify the specific classroom session in a list. It should briefly identify the type of session ie: what was covered.

Classroom Session Authorization Number

If an authorization number was issued for this classroom training session then it should be entered here.

Classroom Attendance

Check off all people that attended the session. The person's name that is creating a new form will be checked automatically.

Classroom Session Start Date/Time

The date and time that the class started.

Classroom Session Training Types

Training types identify the specific types of training that were taught in the class.

Check all types that apply for the session.

Classroom Session Unit(s)

Use the Unit drop-downs to select the unit(s) involved in this session. If you are a member of a specific unit that unit will automatically be selected when the form is first created.

A classroom session may involving up to 4 different units can be submitted on a single form. The units should be selected first then the form should be updated so that attendence selection is possible from all units involved.

SAR Incident/Mission Report

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The SAR Incident Report is designed to capture all pertinent information about Search and Rescue (SAR) Missions.

Collecting information on a SAR incident is an important part of a SAR Mission. The information collected by the resource is fed into a computer system called SISAR at JRCC Victoria and other RCC´s and MRSC´s. Such information will enable us to have better
knowledge as to the cause of the incident, and the clients themselves. This information is also used in developing Boating Safety programs in which the CGA is becoming more and more involved.

The SAR incident/mission report form collects all data relating to a SAR mission including units/vessels involved, their crews, causes, outcome, and events. The accuracy of invformation presented is paramount as this is a legal record of the incident and may be called upon as evidence in certain circumstances.

Once the form as been completed it is submitted and then proceeds through an authorization process. Once submitted only administrators can edit the form unless it is rejected during the authorization process. Therefore, please ensure **all** information on the form is complete and accurate before checking off the *mark complete* box.

Review the following topics for information pretaining to how to fill out the various fields on the form.
See also: SAR_authorization

SAR Incident Action

Indicates the actions taken by the SRU in resolving (or attempting to resolve) the incident.

When a resource is involved in more than one action taken, indicate the one which is the prime action (normally the one which takes up most of the time). For example a resource spent 20 minutes locating a craft aground, 40 minutes re-floating it and 30 minutes towing it back. The main action for this case would be *Re-floated*.

Select the most appropriate from the available choices.

Please *avoid* the use of ´other´ unless no other choice could possibly apply.

Communication
When the assistance provided consisted solely in transmitting information to the unit assisted.

Escort
When the assistance is consisting of a resource escorting a unit to port or a sheltered area.

Evacuation
To be used in the case of medical evacuation or in the case of massive evacuation of persons isolated on a ship/vessel/other

Fire fighting
Case where the assistance provided consisted of putting out a fire.

First Aid
When the assistance required consists of giving first aid treatment without any need for evacuation. (i.e. injuries, minor burns)

Investigation
Investigation done to determine if there are people in danger aboard a drifting boat/object: (i.e. SAR vessel is tasked to investigate an overturned craft)

Monitoring
Incident only requiring surveillance. (i.e. Broken down vessel, not requesting assistance, trying to make its own repairs)

None
Self-explanatory

Recovery
Case where the assistance provided was the recovery on board of the object. (i.e. a sailboard or a corpse)

Re-floated

Vessel aground and re-floated with the assistance and help of the resource

Rescue
When the assistance provided was the successful recovery of a person (i.e. man overboard or a swimmer)

Search
Search to locate a missing vessel, or a person. (i.e. man overboard, reported overdue)

Tasking Cancelled
Only required as an entry when the resource is tasked but before it can depart the mission is cancelled. The tasking of a resource must be registered if the mission is cancelled and if there is a cost because of expenditure to the CGA or Coast Guard.

Technical Assistance
Assistance given allowing the vessel/boat to go on its way, stabilize its situation, make repairs (lend pump, supply fuel or battery, minor repairs, etc.)

Towed
Vessel disabled, requiring assistance from point A to point B

Transit only
When the tasked vessel does not have time to reach the scene of the incident before it´s completion or resolution.

Turn back (Weather/Breakdown)
When the tasked resource on mission is unable to get to the scene of thew incident due to bad weather, rough seas or major breakdown. (To be noted in critical factors) If the CGA resource suffered damage (i.e. deadhead strike, engine failure, etc) and was unable to get to the scene, this must be recorded under significant events.

Other
All other actions not previously covered

SAR Alert Type

This is the method by which the person requesting assistance alerted the SAR system.

Alerts from land/marine/air sources on scene should be identified as visual contact even if they reported the incident by radio. Only alerts from the vessel in difficulty are registered in VHF/HF/MF.

SAR Incident Attachments

Use these *file* fields to attach photos of the incident. Images must be stored on your local computer. Select the file by clicking the browse button and the system will upload them and save them with the incident report when it is submitted.

There is no limit to the number of images that may be submitted. Three fields are displayed by default, If all three are used, update the report and more blank fields will appear (much the same as with the Events area)

SAR Incident Cause

Indicate the cause (or best estimated cause) based on one of the following choices. **Avoid** the use of ´other´ except in cases where none of the other choices could possibly be selected.

Bad Condition (Negligence)
Dry rot, rust, un-repaired damage, vessel is in poor condition, etc.

Dangerous Piloting
Incident caused by the operator to comply with navigation rules, by excessive speeding, undue care and attention, etc.

EPIRB Accidentally Activated
Self-explanatory

Failure to Report.
When a vessel/boat is overdue with a CGRS/VTS/ECARE/NORDEG or WESTREG.

Fatigue
Self-explanatory

Hoax
False message/distress signal. (NOTE: Only to be used when the conveying of information is done with the **intent to deceive**.) Any other case wherein the subject is confirmed not to be in distress and the intent was not to deceive should be classified as "Mistaken Belief"

Hull/Rigging Failure
Any hull or rigging failure not caused by negligence

Ice
Vessel´s water intake is blocked by ice, vessel is crushed or dragged by ice.

Illness
Self-explanatory (does not include suicides/suicide attempts)

Injury
Injury resulting from the incident, hypothermia, exposure to cold, etc.

Lack of Knowledge
Operator does not know the buoyage system, cannot operate his/her navigational instruments (radar, sounder, GPS, etc.), not familiar with area, etc.

Mechanical Failure
Any mechanical breakdown of main propulsion system not resulting from negligence; Breakdown of the shaft and the propeller, including transmission; Failure of the rudder system
(cables, pump, hoses, etc); Any other breakdown, other than previously mentioned, such as general breakdowns caused by obstruction of water intakes, electrical or electronic breakdowns, and structural damage.

Mistaken Belief
When the incident was triggered by a mistaken belief or an over-reaction by the people reporting it, the vessel/persons having never been in any danger/difficulty.

Navigational Error
Incident caused by miscalculation of the position, by having no marine charts on board, by a false maneuver/lack of lookout

Oil Rig Evacuation Alert
When an oilrig is evacuated as a preventive measure.

Out of Fuel (Negligence)
Out of fuel (main propulsion system)

Overload/Stability
Vessel is overloaded or questionable stability

Propeller Fouled
Caused by nets, moorings, or fishing lines caught in the propeller

Suicide or Attempt
Self-explanatory

Weather
Incident caused by foul weather conditions or failure by the operator to obtain weather information

Unknown
When the cause of the incident cannot be determined

Other
Any other cause not previously identified. (Specify in comments section)

Incident Class

The incident class indicates the level of distress indicated by a SAR incident:

- **M1 - Immediate Danger**
  There was grave and immediate danger to persons (vessel on fire/sunk, persons in the water etc...)
- **M2 - Potential Danger**
  A situation existed that could lead to a state of immediate danger (vessel drifting toward shore, taking on water but pumps keeping up etc...)
- **M3 - No Danger**
  No danger but still requiring assistance (vessel broken down, lost etc...)
- **M4 - False Alarm or Hoax**
  No assistance was necessary - call was due to a mistaken belief or a hoax

Do not confuse incident **Class** with incident **Type** - the class is a general clasification whereas the type attempts to specify the specific type of incident.
See also: SAR_incident_type

SAR Incident Dates and Times

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Correct date/time entry is critical. The system calculates all durations directly from the dates and times corresponding to significant points throughout the incident. See each topic belif for more information about that specific date/time field.

SAR Incident Departure Date/Time

The time at which the SRU departed base.

If the SRU was *already underway* when the tasking was received or incident sighted, then the departure date will usually be the same as the date **tasked**
See also: SAR_incident_dates_tasked

SAR incident Operation Ended Date/Time

The time when the operation ended. This is the time at which the unit was stood down by JRCC. As such, it should preceed the Return to Normal Operations (RNO) and usually preseeds the Return To Base (RTB)
See also: SAR_incident_dates_rno SAR_incident_dates_rtb

SAR Incident Off-Time

Duration "time off" measured in hours is to be subtracted from the compensation time of the incident being recorded if the resource was diverted from the case during its transit time for a period of time. (i.e. to respond to another SAR case)

e.g. Incident aground, and the resource returns to base while waiting tide, total transit time from incident to base and back to incident. This is NOT the amount of time the resource spent in transit to the incident being recorded.

SAR Incident On-Scene Date/Time

This field incldes a selection between:

- **On-Scene** - the time when the SRU actually arrives on-scene (at LKP/CSP etc...)
- **Stood Down** - if the tasking was canceled before the unit arrived on-scene

In either case enter the time that the SRU arrives on-scene or was stood down as the case may be. If the SRU was stood down then the Operation Ended time will likely be the same as this.

See also: SAR_incident_dates_endops

Paged/Alert Date/Time

This date/time field consists of two parts. First an identifier as to the method that the SAR unit was alerted:

- **Paged** - typical: paged by JRCC
- **VHF/Cell underway** - Already underway (training, other incident etc) and received phone or VHF radio call.
- **Sighted/Self** - Witnessed the situation or monitored VHF comms indicating the incident.

Followed by the date and time at which the alert occured.
See also: SAR_incident_dates_tasked

SAR Incident RNO Date/Time

The time at which the SRU *Returned to Normal Operations* ie: the vessel has been refueled, gear re-stowed, crew debrief complete, and ready to respond again via pager.

It is a common mistake to confuse the *Return To Base* date/time with the RNO date/time
See also: SAR_incident_dates_rtb

Return To Base

The time at which the SRU returned and secured at base. This usually preceeds RNO
See also: SAR_incident_dates_rno

SAR Tasking Date/Time

This is the date/time of the tasking (the point at which JRCC formally tasks the SRU to respond to an incident.

In some cases it may be the same as the Alert and/or Departed when the SRU is already underway when tasked.
See also: SAR_incident_dates_paged SAR_incident_dates_departed

SAR Incident Description

Describe what transpired. Please describe the incident with enough detail to allow a reader unfamiliar with the incident to be able to understand what was done, and why.

When in doubt - be verbose!

If any pertinant information needs to be included with the report and there is no specific field for it - please include it in the description.

SAR Incident Detection Typs

Indicates the method of detection used by the SRU to locate the unit assisted.

Select the most approperiate from the available choices.

Please *avoid* the use of ´other´ unless no other choice could possibly apply.

Air Support
When the detection was accomplished by an aircraft working with the vessel. (i.e. Air Support - 442 Comox, Air Support - CASARA)

DF (406)
Direction finding on EPIRB´s 406 mhz frequency

DF (CB)
Direction finding on CB frequency

DF (HF)
Direction finding on HF frequencies

DF (VHF)
Direction finding on VHF frequencies

Infrared
Using infrared equipment to locate heat sources (from a vessel, aircraft, satellite)

Night Illumination Flares
Illumination flares dropped by aircraft in the search area

Night Vision Goggles
Night vision goggles or any other equipment increasing night vision.

None
When there is no detection, (nothing found)

Radar Detection
Vessel/object located by radar

Radar (SART)
When the object detected was equipped with a transponder

Radio Contact
When the detection was achieved following an exchange of information over the radio.

SARSAT/COSPAS
Detection via SARSAT/COSPAS using an ELT.

Search light
Night detection using the resource´s searchlight

Visual Contact (Daytime)
Self-explanatory

Visual Contact (Night time)
Self-explanatory

Other
Self explanatory - description may be added to identify the method used

SAR Incident Daughter Boat Use

To be used by larger CGA vessels with daughter boat capabilities which were utilized during the incident. Total time spent by daughter boats if more than one:
Daughter boat 1 (D1)
Daughter boat 2 (D2)

D1 + D2 = Total time.

SAR Incident - Significant Events

Write a brief description concerning the case handled by the SRU. Include the times of the events (local time) and a short description of events (please describe the incident with enough detail to allow a reader unfamiliar with the incident to be able to understand what was done, and why). The first entry in this section should indicate the time of alert and who requested the resource eg:

```
1030  Paged (3) JRCC
```

If you need more room - fill the visible fields and then update the report (click the update button) additional fields will be added automatically.

IMPORTANT:
Any damage to the resource, injuries to crew members, loss of equipment or loss of

personal gear that may become a claim towards the CGA, WCB or to private Insurance Underwriters is to be noted in the significant events. For additional information, refer to the Unit Leader's Manual

SAR Incident LAT

The latitude of the Incident. This can be the most approperiate of the following:

- Actual Incident Location
- Reported Location
- Extent of Transit
- CSP
- LKP

Please Note Even though the fields are provided as Degrees, Minutes, and Seconds - you can enter the Latitude as Decimal Degrees, Degrees and Decimal Minutes, or Degrees-Minutes-Seconds and the system will convert it automatically.

Use the **Select By Map** function to call up a list of charts - you can then click on the chart to position the Lat/Long without manually typing it in.

SAR Incident LONG

The longitude of the Incident. This can be the most approperiate of the following:

- Actual Incident Location
- Reported Location
- Extent of Transit
- CSP
- LKP

Please Note Even though the fields are provided as Degrees, Minutes, and Seconds - you can enter the Longitude as Decimal Degrees, Degrees and Decimal Minutes, or Degrees-Minutes-Seconds and the system will convert it automatically.

Use the **Select By Map** function to call up a list of charts - you can then click on the chart to position the Lat/Long without manually typing it in.

SAR Incident Number

This is the incident reference number as supplied by JRCC. The convention is to enter it with leading zeros up to 4 digits for example:

0186

SAR Incident/Mission Personell

check off all crewmembers (including the Coxswain) that were involved in this incident. The member's name that is creating a new form will be checked automatically.

Incident Polution

This flag regords if polution was a factor in the incident.

Select the most approperiate from the available choices.

none There was no polution

A Factor Polution was a factor during the incident but it was not the primary issue at hand.

Primary Concern The primary reason for the tasking was polution prevention/control.

SAR Incident Supplement

Use to distinguish between multiple taskings under the same number. This typically incolves a return to a scene (such as a vessel aground) by a different crew later in the day, or on the following day - yet is still under the same incident number.

In all other cases, just leave the supplement as ´0´
See also: SAR_incident_number

SAR Incident Title

This is simple a brief indicator of what the incident was all about. It will help you and others when looking through lists of incidents to quickly identify what this incident was.

Enter a short title that you would like describes what the incident was all about - for example:

Person In Water off Somewhere Pt.

SAR Incident Type

Specifies the type of incident. Try to choose the best possible from the list. **Avoid** the use of 'other' unless absolutely no other type relates to the incident at hand.

Adrift (No POB)
This would be a vessel that has broken away from her moorings/anchor(s) and is floating free without anyone on board

Aircraft
Includes all incidents involving airplane, helicopter, hydroplane, etc. (out of fuel, crash, etc)

Capsized
Vessel overturned caused by improper loading, water coming in, and/or sudden squall of wind

Collision with ship
Contact between two vessels/crafts

Collision with object
Collision with a wharf, pier, breakwater, deadhead, buoy or such similar objects

Disabled
A situation wherein a vessel with people on board is not under command due to human or climatic factors or mechanical breakdowns (sailboards, sailboats in high winds, nets caught in propellers,
strong currents)

Disoriented
Vessel's operator unable to fix/establish his/her position (lost in daytime, nighttime or in fog)

Diving
Any incident including diving activity (SCUBA diving/commercial diving)

Drowned
Body found submerged in the water and the cause was not related to a recent marine incident

False Alarm
Any incident that resulted in a search/investigation by a SAR Unit and turned out to be a false alarm (distress flare, overdue, lost radio contact, hoax, presumed incident)

Foundered
Sinking of a vessel/craft due to water intake:(i.e. weather, broken fitting, pipe, etc) -- Note: Sinking due to fire, collision or overturning must be entered according to those specific incident types

Grounded
Vessel that struck bottom, and all non-voluntary grounding (Voluntary grounding or beaching to save a vessel is not included)

Man Overboard
Persons in the water as a result of falling over the ship' or vessel's side. (excludes divers and swimmers)

Mechanical breakdown
A situation wherein a vessel with people on board, is not under command due to mechanical breakdown (i.e. dead engine, steering disabled, etc.)

Medical
Evacuation of sick/ injured persons, transportation of physician and/or medical personnel and/or human organs

On Fire
Fire on board (explosions included)

Persons on the Ice
An incident involving persons adrift on ice, fishermen, snowmobiles and cars through the ice

Suicide Attempt
Any voluntary attempt at self-inflicting death

Swimmer
The person requiring assistance was swimming prior to becoming in danger

Taking on Water
The vessels watertight integrity is lost through some malfunction, leak rupture, etc., but does not founder

Other
Any other incident not described above. (i.e. car in the water) Add a short description when using other as Incident Type.

SAR Incident Vessel

The vessel drop-down allows you to selected the vessel from the unit that was involved in the incident.

When the form is first created it assumes these will be vessels from your unit. If you have changed the unit - you must update the form to get a list of vessels from the unit you have specified in the SAR Unit drop-down.

If more then one vessel was involved (even if they are from the same unit) a seperate form must be submitted for each vessel/crew involved.
See also: SAR_vessel SAR_unit

SAR Personell

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Each member of a unit must be created in the system. Once created, the system can start tracking that member´s time, create a log, and record their participation events, training, and missions.

View the topics above regarding each of the fields on the form for help with specific information.

The SAR Person form allows the basic information about a person to be retained in the system. More importantly, it provides unit leaders/managers a way to assign access to certain functions within the unit.

Pay special attention to the **Person -> UserID Relationship** as this must be set correctly for a user to access their own log and records.

Personnel Access Settings

The access settings contained within the personnel record are designed to afford Unit Officers with the ability to control which members are allowed to perform various tasks.

Each setting controls access to various functions/forms within the system.

Important
A member´s access must be set correctly or they may not be allowed by the system to perform their duties. For example: if a coxswain needs to report the completion of a SAR mission but does not have the access flag "*Submit Incident Reports*" set to "*Yes*" then they will not be able to do so. It is the responsibility of those managing the unit (ie: The Unit

Leader) to ensure that all personnel have the appropriate access for their role within the unit.

If a member has been granted the correct access in their personnel record, and they have a user account linked to it but still can't access the system - then it is likely their site security is not set correctly and a site administrator will need to correct that.
See also: SAR_person_user

Personal Equipment

Allows equipment provided to personnel by the unit to be tracked. Equipment types are defined by site administrators (if you need a new type contact one of the administrators)

Specify the quantity/amount of each item that has been assigned to the person in question. The system can report all assigned equipment for the unit by person and including totals for each equipment type.

Person´s Name

The name of this person. If the ID from the *user* field is populated, the member´s name as defined in the site´s user database will replace anything entered in the name field.
See also: SAR_person_user

Personell Number

This person's member number

SAR ID Portrait

Use this field to select and upload an ID photo for this member. ID Photos are automatically cropped to 640 pixels high by 480 pixels wide. Portrait images should be "passport style" head and shoulders only and without dark glasses.

Image files in JPG (Jpeg) format are acceptable and must not be over 2Mb in size.

Person´s Position

A members current position (or positions) within the unit. Check off all that apply.

Eg: A member may be a Coxswain as well as the Dep. Unit Leader

SAR Training Item Signoff

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The Training Item Sigoff area provides trainers the ability to sign-off the various training items associated with a person's current training level. It also allows the person to revies what items have already been signed off and what items still need to be completed.

Training Signoff Level

Specifies what training level items are being signed-off. By default the person's current training level is automatically selected. To signoff or review items from a different level - change the level using the drop-down and update the list using the update button at the bottom.

Personell Status

This person's status. Members who have left the unit should not be deleted but set to *inactive* so a record of their past activity is maintained.

Person's Unit

Use the drop-down to select the unit this person is part of. The *Other Unit* drop-down may be used to identify a secondary unit where this person also crews.

Person -> UserID Relationship

The user field contains the user database ID that relates to this person (assuming they are a member of the web site)

Use the **select** button next to the field to search for the user. IF the correct user is found - click the button next to their name and the system will automatically enter the correct ID in the *user* box. Once a SAR person is linked to their user record in this manner that person will have access to their log and personell overview report - **it is therefore a very important step to link the personell record and user id in this manner**.

If this person dosen´t have a userid on the web site then enter their name in the box to the right and leave the User ID field blank.

People **can not** access their records without a valid site login - in a member has not signed up on the site, encourage them to do so and then update the UserID record with their system id as indicated above.

See also: SAR_person_name

SAR Request Form

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The SAR request is a generic form that can be used for all manner of requests. The difference here is that site administrators create *Request Types* that configure what information the request must contain. These requests are then run through the same authorization process as with other system forms.

Request Description

Provide a description sufficient to explain the request to someone unfamiliar with the activity. The descriprion should outline anything of importance not otherwise specified on the form.

Event/Activity End Date

The date and time that the event/activity will end.

Request Expences

not all request types will require expence estimates

The expences section covers **all** expected expences associated with the request. The estimate should include expences for all members attending. The total will be computed automatically.

Some Notes:

Mileage Ensure this is in Km and totalled for all members.

Accommodations Ensure all members are included in this estimate eg: 5 people attending for 2 nights (but 2 of the people will share a room) = *4 rooms for 2 nights*

Meals Total number of meals required - eg 3 people for 2 full days = *6 breakfasts, 6 lunches, & 6 dinners*

Other Expences Use this section to include expected costs that are not included elsewlere. This could be things like parking fees, admittence, presentor's fees, materials, etc...

Requested Information

When administrators configure the request form - different types of requests require different (specific) information. This section of the form contains details specifically requested by the administrator for this type of request form.

Request Name

A name or title for this request - used mainly to identify the specific request in a list. It should briefly identify what the resuest is for.

Request Number

There are two types of numbes for requests:

Request Number

This is created automatically by the system to be used to track the request.

Approval Number

This number is also created by the system - but is only appended to the request if it is approved. Subsiquent claims must reference this number.

Request Personel

Not all request types will include personel selection

Check off all people that will be involved. The person´s name that is creating a new request will be checked automatically.

Event/Activity Start Date

The date and time that the event/activity will start.

Request Unit(s)

Use the Unit drop-downs to select the unit(s) involved in this activity. If you are a member of a specific unit that unit will automatically be selected when the form is first created.

Some Requests
Depending on the request type some activities may involve up to 4 different units can be submitted on a single form. The units should be selected first then the form should be updated so that vessel selection and personel selection is possible from all units.

Request Vessel(s)

Not all request types will include vessel selection.

Use the Vessel drop-downs to select the vessel(s) involved in this activity. If you are a member of a specific unit that unit´s vessel will automatically be selected when the form is first created.

Some Requests
Depending on the request type some activities may involve up to 4 different vessels and can be submitted on a single form. If more then one unit is participating, The units should be selected first then the form should be updated so that vessel selection is possible from all units.

SAR Quick/Number Search

The quick search is designed to help you quickly find items in the SMS. It works best when you search using a **number** (for example an incident number)

You can also search for items by name/title (or portions of the name/title)

Narrowing your search to a specific group of items (searching only for an incident report) will make it faster and more accurate but you can leave it set on *everything* and search the entire database - you should still find what you´re looking for.

Number searches have an automatic wildcard at the beginning. Thus, a search for "12" will find results for ´0012´, ´0312´, or anything else ending in 12.

You may use the ´%´ character as a wildcard inside any search term. For example 'Th%' would find items starting with "Th"

If the search locates a single item it will display that item in full. If multiple items are

found it will display a list of items in summary form.

Current Limitation
Personnel that do not have a link to a username/password (userid) on the site will not be found by a search for their name. They will be found by their number. Personnel with a link to a username/password (userid) will be found by a name or number search.

SAR Training Report

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The training report collects all data regarding on-water training conducted by a SRU. Please fill out the form as accurately as possible.

Once the form as been completed it is submitted and then proceeds through an authorization process. Once submitted only administrators can edit the form unless it is rejected during the authorization process. Therefore, please ensure **all** information on the form is complete and accurate before checking off the *mark complete* box.
See also: SAR_authorization

Training Categories

Training categories identify the main categories of training exercises that can be conducted.

Check all categories that apply for training forms.

Training Description

Details of the training exercise. Describe what specifically was done during the exercise. Any incident of injury to the crew or damage to the vessel should also be recorded here.

Training Stop Date/Time

The date and time that the training exercise was completed.

Training Items

Training Items are the components that make up the various training levels. Each item is defined in the system and assigned as a component of a training level - the idea being that once all the items in a level have been completed by a person - they have completed the level.

Training Report Name

A name or title for this report - used mainly to identify the specific training exercise in a list. It should briefly identify the type of exercise/what was done.

Training Authorization Number

If an authorization was issued for thie training exercise it should be entered in this field.

Training Personell

check off all crewmembers (including the Coxswain) that were involved in this exercise. The member's name that is creating a new form will be checked automatically.

Training Wave Height

Select the typical range of wave height experienced during the training exercise.

Training Start Date/Time

The date and time that the training exercise started.

Training Travel/Off Time

Time spent not training that is included in the overall duration./ Some examples include:

- Traveling (by land) to/from the training location.
- Being diverted to an incident and then returning to complete training later.

This will be subtracted from the complete training duration.

Training Types

Training types identify the specific types of training that cna be focused upon during an exercise.

Check all types that apply for training forms.

Training Unit(s)

Use the Unit drop-downs to select the unit(s) involved in this exercise. If you are a member of a specific unit that unit will automatically be selected when the form is first created.

An exercise involving up to 4 different units can be submitted on a single form. The units should be selected first then the form should be updated so that vessel selection and personell selection is possible from all units.

SAR Training Vessel(s)

Use the Vessel drop-downs to select the vessel(s) involved in this exercise. If you are a member of a specific unit that unit's vessel will automatically be selected when the form is first created.

An exercise may involve up to 4 different vessels and still be submitted on a single form. If more then one unit is participating, The units should be selected first then the form should be updated so that vessel selection is possible from all units.

Training Visibility

Specify the visibility conditions during the exercise. Includign if the exercise was conducted mainly during the day or at night and if there was any form of *restricted visibility* including fog, snow, heavy rain, etc...

Training Wind Direction & Speed

Specify the typical wind speed in knots and the prevailing direction. Choose from the drop-down lists in both cases.

SAR Unit

The SAR unit form contains data identifing the unit, it´s location, structure, and some contact details.

Unit Mailing Address

The postal mailing address for this unit.

Training Hours Allottment

The number of hours (in a calendar year - 365 days) allotted to this unit for training.

Unit Description

A short description of this unit, prehaps outlining something of it's history and the local communities served.

Unit Operating Entity

Record the name of the group where a unit is operated by a registered society, organization, company, or other such group...

Unit Name

This is the name of the unit (the number is seperate) and should be entered in a general readable form. **Avoid** the use of all-CAPS as it makes text more difficult to read.

Unit Notification Email

Enter one or two email addresses used to notify the unit regarding special notices, authorization requests and notices and other general contacts. The SAR System will use

this email address whenever it sends unit-level notifications so it is very important that at least one a valid email address be input.

Unit Number

The unit identification number

Unit Region

Select the unit's region from the list. Administrators can manage the list using the SAR Region Management function.

Unit Zone

Select the unit's zone from the list. Administrators can manage the list using the SAR Zone Management function.

SAR Vessel

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The name, configuration, specifications, location, and equipment carried aboard a SAR vessel.

This information is important to JRCC so please ensure it is correct. Also, be sure to check the vessel map report when finished to varify that the lat/long has been entered correctly (the vessels should be plotted at the correct positions on the map)
See also: reports_vessel-map

Vessel Capacity

The legal capacity of the vessel (as indicated on the capacity plate where applicable)

Vessel Class

The class of vessel - typically referrs to the type of construction ie: RHI, Cabin Cruiser etc...

It is important for administrators defining vessel classes to avoid redundancy with the vessel type.
See also: SAR_vessel_type

Vessel Configuration

Further specifies the configuration of the vessel - typically including options such as seating arrangement and special features of the vessel.

Vessel Description

A Brief description of the vessel - perhaps including general information such as the owner and location.

Vessel Equipment

The various equipment typically carried aboard the vessel including fixed navigation and propulsion gear.

Vessel equipment is pre-defined by administrators by category and individual vessels can specify a quantity for each item. Items not carried on the vessel or not applicable should be left at a quantity of 0

Vessel Length Over All

The total length of the vessel, specified in feet.

Vessel Location

The Lat/Long and placenemt of the vessels normal base (berth/dock)

Use the **Select By Map** function to point and click on the precise location of the vessel for the best results.

In either case, check the *vessel map* report when finished to varify that the lat/long has been entered correctly (the vessels should be plotted at the correct positions on the map)
See also: reports_vessel-map

Vessel Name

The name of the vessel - this should be the registered name of the vessel.

Vessel SAR Rate

The reimbursement rate for this vessel (where applicable) used to calculate reimbursement for activities involving this vessel.

This field is only accessable for edit by administrators. Units will be able to view the rate but not change it.

Vessel Registration/License Number

The vessel registration/license number (eg CO25011BC)

Vessel Speed

The typical cruise speed of the vessel in knots.

Vessel Status

Describes the normal status of the vessel. This is not used to indicate a vessel that is temporairly out of service for maintenance or some other reason but if the vessel is perminantly inactive.

Vessel Type

The specific type of vessel - typically manufacturer and model, or simply Owner/OP for general Owner/Operator vessels.

it is important for administrators defining vessel types to avoid redundancy with the vessel class. Classes are for construction/overall clasifications where types refer to specific models.
See also: SAR_vessel_class

Vessel Unit

The unit that maintains this vessel. If more then one unit jointly operate a vessel - select the unit that is most in control of the vessel.

SMS Walk-throughs

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Step-by-step instructions for specific tasks within the SAR Management System.

Creating and Editing a Cert

The Cert system is designed to track certifications and their associated documentation on a per-person basis.

People may add their own certs at any time, attach scanned images of any related documents, and sign them so they proceed along a workflow predefined by the site administrator.

New Cert

To create a new cert record or to edit an existing cert a person should click on **certs** in the SAR Administration Tools in the column headed by their name. This will give them a list o the certs that they already have and a *New Cert* button at the bottom. Click this button to create a new cert or click ´Edit´ next to an existing record to make changes. Only certs that are still in an "Open" status may be edited.

If you are creating a new cert - you will first need to click on which ´type´ of cert this will be. Cert types have been pre-defined by the site administrators - and are the only kinds of cert that may be tracked by the system.

Add/Edit a Cert

Regardless of if your are editing or creating a new cert, enter as much information as possible. Some certs require a number, others do not. You should also, if at all possible, attach a scanned copy of the actual certification document. If you don´t have a scanner you can usually get a good rendition using a digital camera in a well lit room - hold the camera a bit further away and zoom in on the document - use a tripod if at all possible.

Once **ALL** the required information has been entered on the form - check off the ´Mark Complete" box at the bottom. This tells the system that you are finished editing the cert and will mark it "Pending" - you will not be able to make any more edits after that point. If you´re not finished and need to edit it again later - don´t check the box.

Either way click "Update" to save what you have done.

Authorizing the Cert

As with almost all forms in the SAR Management System you must "Authorize" a cert in order for it to proceed along with it's workflow and be completed.

After the cert record has been updated with the "Mark Complete" box checked it can be authorized by clicking the "Authorize" button displayed near the bottom of the cert. Clicking the "Authorize" button will bring up the Authorization form. You will need to sign the cert and can enter any notes (generally you will not need to change anything on this form) just click the "Add Authorization" button to save your signature and the cert will proceed to the next step along it's workflow.

Completion

After the cert has progressed through all the required signatures it will be closed automatically. If it is a cert type that has an expiration - you will be notified prior to the expiration unless a new cert of the same type is added before it expires.
See also: SAR_cert

Search and Rescue Management System
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SMS: Mark Complete Box

Many forms in the SMS have a checkbox labeled 'Mark Complete' at the bottom. This box exists to allow users to start a form and then return and edit it later - rather then needing to keep getting a notification message that the form is incomplete. It also serves to tell the system that the form is expected to be completed and that any internal processing that may use stats from the form can commence.

Do not confuse marking a form complete with signing (authorizing) the form.

Mark Complete tells the system that you are finished editing the form. Once you mark a form complete it is locked and cannot be edited (except by an administrator) unless it is either re-opened (which is only possible if it hasn't yet been signed) or rejected.

Authorization is a formal digital signature that initiates the workflow processing and is recorded in the audit trail. Authorizing the form sends it along to the next person in the workflow.

An analogy might be:

Mark Complete is like hitting 'Print' on your computer.
Authorizing is like signing the printed form and faxing it to someone else.

Recommended SAR Classroom Hours

The minimum number of hours (per month) that individual person should participate in classroom training. This value is computed and displayed on several of the training reports for the time periods in question.

The default is 1 = 12 hours/year.

High Security Vessel Rates

specified (Yes or No) if vessel rate assignment is classified as High Security or not. If 'No' then anyone that can edit a vessel can specify the associated reimbursement rate. If 'Yes' then only full administrators may assign the rate.

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Photo ID Expiration (months)

The number of months after which photo ID cards should automatically expire.

Minimum Incident Reimbursement Time

specified a minimum time to be used for incident reimbursement calculations. This relates to the "Underway" or Time-Departed until Time-Returned-To-Base excluding any off-time.

For example:
If a crew is actually away for 45mins and the minimum is set to 1h then the reimbursement calculation will base the calculation on 1 hour for reimbursement.

If they were away for more then 1h then the actual time would be used.

Photo ID Request Email

Send photo ID requests to this email address.

SAR Module Title

This is the title of the SAR system for this web site and is displayed at the top of pages within the SAR system

SAR Management System (SMS)

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Achievements

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Achievements are a method that allows personnel to track training and certifications that may be related by are not officially a component of the the regime of training in the organization. These can also include participation in special events and competitions and/or awards and certificates of merit, commendations etc.

For example if someone holds their pilot´s license or won or participated in a SAR competition. This could be included as achievements. The administrator must created the achievement types before personnel can add them to their log though. This ensures that there is an element of control over what types are included and ensures that completely unrelated achievements are not added to the system.

Achievement Description

A brief description describing the achievement and any amplifying information about it.

Achievement Name

The name of the achievement, displayed in selection lists and displayed throughout the system when the achievement has been assigned by/for a person.

Activity Reports

Table of Contents

Activity Description

This should be a detailed description of the activity - explain anything not already covered in the form and any special information that may be of interest or, of compensation is being sought, any amplifying information that will assist in justifying the expense.

If the activity involved any damage, injury, public complaint, and/or the like these must be noted in the description for future reference.

Activity Information

When administrators configure the activity type they select different required (specific) information. This section of the form contains fields to record those details specifically requested by the administrator for this type of activity.

Activity - Mark Complete

Once the activity form is complete check the "Mark Complete" box and update the form.

for details on the meaning and use of this process view the 'mark-complete' topic listed below.

See also: mark-complete

Activity Type

Table of Contents

Activity types define the content, work-flow, and specifics for each different general classification of activity to be tracked in the system. Activities can be thought of as anything that should be reported that does not fit into one of the preformatted reporting forms (Incidents, Training Exercises, Classroom Sessions)

eg: Meetings, Maintenance, R&D etc...

Activities may be approved through their workflow, may require an approved request, and may include reimbursement.

Activity Type Description

A brief description of the activity type that should help people understand what it is for and when to use it. This is displayed along with the activity type name in selection lists.

Activity Type Included Information

These options control what information is included in the activity forms of this type.

Assets

Should a selection for assets used during the activity be included.

Multiple Units

Should multiple units be selected for the activity or it is always related only to a single unit.

Expenses

Should a claim for expenses (travel etc) be included.

Activity Type Name

The name of the activity type used in selection lists and displayed throughout the system. It should concisely describe the activity type such that people can correctly select it when creating an activity report.

Activity Number Specification

Activities reports are associated with a reference code called the Activity number. There as several options associated with how this reference is assigned.

First, it can be required or optional and second it can be generated automatically by the system, manually entered by the user completing the report, or match an authorized request.

Several Examples

1) An activity report can only be processed once an associated request has been approved and the two should be linked by their reference number:

Set the number to be **Required** and have the number **Match** the associated request type. This will ensure that activities of this type may only be reported when they can be tied to a matching and approved request.

2) An activity report might have a number but if there isn't one the system should automatically generate one.

Set the number to be **Optional** and have the number **Generated Automatically**. In this case the system will always create a number, but the user can edit the number and change it to the existing number (if there is one)

Activity Type Options

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Options are additional questions to be asked on the activity report form. There can be any number of these and they can be set to different types of response.

Activity Type Option Name

The option name is the question (or requested data) as it will be displayed to the user filling out the form.

Activity Type Option Type

The type of response expected when the optional data is reported. The following types are permitted:

N/A
This option will be hidden.

Check-box
The user may check a box for this option.

Yes/No
The user must select either yes or no from a drop-down for this option.

Number
The user must enter a number in a field for a response.

Text Field
The user may enter a block of text as a response.

Activity Type Status

Allows activity types to be marked as active or inactive. Inactive activity types are not available for new reports and are not shown on any select lists, but any activities that have already been created of that type remain in the system and can be tracked and/or processed.

Activity Type Colour Tag

The colour tag serves to distinguish between different types of activities in reports and lists by colour-coding individual activity types. All activity reports of the type are displayed with this colour in a block next to their title.

Activity Type Workflow

The workflow that should be followed by activity reports of this type. Auth Levels are selected in order using the select boxes. The maximum number of steps in the workflow being limited by the number of levels that have been defined.

Activity - Units Involved

Allows all units that were involved in this activity to be selected from drop-down lists. Up to 4 different units can be selected.

SMS Authorization

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The SAR Authorization form allows users with authorization access to authorize requests and/or reports via the SAR Authorization system.

Authorizations are stored both in the form´s history (which acts like an audit trail) and the form´s authorization record. Should the request or form be rejected the authorization record is deleted and the report/request is sent back to it´s creator for update - the history is **not** deleted.

Authorization Flags

Table of Contents

Authorization flags are a method by which any report in the system can be "Flagged" with a preset notice during the authorization process. These can then be used for reporting based on settings in the preferences.

Any user that may authorize a report may also add up to 4 flags per authorization.

Authorization Flag Description

A brief description o the flag along with any amplifying information describing how and when it should be used.

Authorization Flag Name

The name of the flag - used in select lists and as displayed throughout the system and in reports.

Authorization Level

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Authorization Level Description

A brief description of this authorization level and any amplifying information that will help others understand how it is to be used.

Authorization Level Name

The name assigned to this authorization level. It should be entered as it is to be displayed throughout the system, on reports, notifications, forms, and preferences.

Authorization Notification Email

The email address to which notifications should be sent when reports require approval at this level. This is an optional field an may be left blank if no email notification is required.

Notifications are not sent regardless of the contents of this field for the first step in any workflow as that would be redundant as forms should be initially signed (authorized) by whomever is submitting them.

Authorization System Level

The system level assigned to an authorization level is used to associate a known level to each of the levels created when configuring the system. These known levels can then be referenced in the security configuration for the XDe allowing the administrator to specify the maximum 'System Level' for which a user may authorize in the SMS.

The selection is in order from lowest access to highest access:

Data Entry
Unit
Region
Zone
Headquarters
Financial
Executive

These same selections are included in the special security options for the SMS when defining security profiles within the XDe.

A user is then restricted to only those authorization levels at or below the level specified in their security profile when adding authorizations in the SMS.

Authorization Level Type

When authorizations are processed during the normal workflow for any report, there are several possible types of authorization that may be required - each having a slightly different requirement. The following Authorization Types are possible:

Signature

This is the most basic type of authorization and merely involves attaching a digital signature to the report's workflow.

Hours

Includes both a digital signature and a field where a number of hours may be included - this should be used for reports that require an approval for a set number of hours. The approved hours are then included in budget reports and override the calculated hours when the system computes any reimbursement associated with the report.

Amount

Similar to 'Hours' this type also includes a digital signature but rather then a number of hours it includes an approval for an amount of money associated with the report. The approved amount is then included in budget reports and overrides any calculated reimbursement amount computed by the system.

Payment

This type also includes a digital signature but an amount of money paid is specified. This is used by the system when comparing amounts approved vs amounts paid in budget reports.

Accept/Print

This is a special type of authorization that is designed to facilitate rapid bulk processing of reports. It should only be used when no human intervention is required (ie the report has already been verified and/or approved) and need only me marked has having been processed - for example if a batch of reports needs to be printed. The signature of the user completing the bulk process is attached to every report authorized in this manner.

Authorization Notes

When authorizing a report you my add notes that will become a part of the history/audit trail for that report.

Notes can be used to present any additional information and typically are used to address any policy issue and/or special instructions regarding the report in question that wouldn't normally become part of the report itself.

See also: SAR_authorization_flag

SAR Cert

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Cert Type

Table of Contents

Certification types define the different certs that are tracked by the system. Each individual cert corresponds to a defined type. The type is where administrators can specify the details of how the cert is configured, other types that are equal or better then it and the notification and workflow specifications.

Cert Type Active Flag

specifies if this type is active or not. Inactive cert types can no longer be used to create new certs and do not appear in select lists but any certs already created of these types can continue to be tracked in the system.

Cert Type Description

A brief description of this cert and any amplifying information that explains when it should be used.

Cert Type Validity Duration

For certifications that do expire, these fields allow the duration of validity to be specified. The expiration will automatically be calculated by the system from the cert date for the period specified.

For Example: A First Aid certification that expires after 3 years would specify '3' in the duration and select 'years' from the drop-down list.

Cert Type Expires

This flag indicates if this type of certification expires after some period of time.

For Example: In Canada a radio operators license never expires whereas a first aid certification general expires after 2 or 3 years.

Cert Type Instructions

Additional (optional) instructions displayed on the cert reporting form that will assist the user recording this certification with the data-entry process or any other internal procedures.

For example The organization may require a notarized copy of some certification in addition to hat is recorded in the SMS.

Cert Type Name

The name of this cert type as it should be displayed throughout the system in select lists and reports.

Cert Type Notifications

These setting specify who should be notified when/if a cert expires:

The person (whomever is listed as the holder of the cert) - an email will be sent directly to the person.

The unit (the primary unit for specified for the person) - an email will be sent to all contacts specified for the unit.

Other Some other email address that should receive a notification message.

Cert Type Number Required

Specifies if a reference number is required when certs of this type are recorded. Some certifications include a number and others do not - this flag allows the type to control if a number is required or not in order to save the cert.

For certs that may or may not have a number - set this flag to 'No' a field will still be provided to enter a number on the cert form but with this flag set to no it may be left blank.

Cert Types - Related Types

This section lists all existing certs already defined in the system. Any certs that are related to this one in such a way that they are '**Equal or Better**' should be selected.

This relationship is used by the system when it looks at a person's training and certifications to determine if they are missing any certifications. They may possess a certification that exceeds the requirements - or at least is equal.

Because of this arrangement it is recommended that when entering a group of related certifications one should start with the most basic and work up to the top-level certs last so that lower level certs will already be available in this list.

Administrators should also remember to go back and ensure all appropriate relationships have been created when adding a new cert later on.

Cert Type Workflow

The workflow that should be followed by certs of this type. Auth Levels are selected in order using the select boxes. The maximum number of steps in the workflow being limited by the number of levels that have been defined.

See also: SAR_authorization_level

SMS Claims

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Claims are used to request reimbursement to an individual for expenses and/or travel. These may be associated with an activity but need not be. Claims are tracked against personnel and can only be accessed by the individual submitting the claim and full system administrators or those designated along the workflow of the claim.

Claim Attached Images

Images (typically scanned images of receipts) can be included along with the requested data for a claim form. There is no limit to the number of images that may be included.

Images must be supplied in GIF, JPG, or PNG format and the total size of the upload must not exceed 5Mb (on most servers)

By default the form includes space for up to 3 images. If more then three images are required additional space will be provided once the form has been updated (simply edit the claim to add more images)

For general help uploading images see 'images' below.

See also: images

Claim Description

A description of the claim. Provide any additional information hat will assist whoever needs to process the claim. If there are any special considerations or notes etc...

Claim End Date and Time

The date and time marking the end of the claim period.

For example: if the claim was a travel claim then this would be the date and time you arrived home.

Claim Expense Report

The section of the claim form is used to record all expenses, travel, and other fees associated with the claim.

Some Notes:

Mileage Ensure this is in Km and totaled for the entire date range of the claim.

Accommodations Ensure all rooms for which a claim is being issued (by this person) are included eg: 5 people attending for 2 nights (but 2 of the people will share a room) and you paid for all 5 = *4 rooms for 2 nights* - a receipt or receipts should be attached.

Meals Total number of meals being claimed eg:*6 breakfasts, 6 lunches, and 6 dinners*

Other Expenses Use this section to include expected costs that are not included elsewhere. This could be things like parking fees, admittance, materials, etc... Receipts should be attached for all incidental expenses.

Claim - Requested Information

The section will be different depending on how the claim has been configured by the administrator. It will may ask different questions depending on the claim type.

Provide as much information as possible following the prompts provided.

Claim Number

The claim number and any associated approval number.

Claim - Related Person

The person submitting this claim. Only administrators may edit this information - in all other cases the person recording the data on the claim form is automatically recorded here.

Claim Start Date and Time

The date and time to report as the start of the claim period.

For example: if this is a travel claim - this would be the date and time you departed.

Claim - Mark Complete

Once the claim form is complete check the "Mark Complete" box and update the form.

This box exists to allow users to start a form and then return and edit it later - rather then needing to keep getting a notification message that the form is incomplete. It also serves to tell the system that the form is expected to be completed and that any internal processing that may use stats from the form can commence.

Do not confuse marking a form complete with signing (authorizing) the form.

Mark Complete tells the system that you are finished editing the form.
Authorization is a formal digital signature that initiates the workflow processing and is recorded in the audit trail.

See also: mark-complete

Claim Title

A title for this claim. The title is primarily used to distinguish this claim from others in a list or when searching.

Claim Type

Table of Contents

Claim types define the content, work-flow, and specifics for each different general classification of claims to be tracked in the system.

eg: Travel Claims, Expense Claims etc...

Claim Type Description

A brief description of the claim type that should help people understand what it is for and when to use it. This is displayed along with the claim type name in selection lists.

Claim Type Included Information

These options control what information is included in the claim forms of this type.

Date/Time Range

Set to yes to include date and time associated with the claim. All claims are date-stamped - this is used when the claim pertains to something that occurred on a particular date. Most claims will include a date/time range

Expense Budget

Should a form for expenses (travel etc) be included.

Claim Type Name

The name of the claim type used in selection lists and displayed throughout the system. It should concisely describe the claim type such that people can correctly select it when creating a claim.

Claim Type Options

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Options are additional questions to be asked on the claim form. There can be any number of these and they can be set to different types of response.

Claim Type Option Name

The option name is the question (or requested data) as it will be displayed to the user filling out the form.

Claim Type Option Type

The type of response expected when the optional data is reported. The following types are permitted:

N/A

This option will be hidden.

Check-box

The user may check a box for this option.

Yes/No

The user must select either yes or no from a drop-down for this option.

Number

The user must enter a number in a field for a response.

Text Field

The user may enter a block of text as a response.

Claim Type Status

Allows claim types to be marked as active or inactive. Inactive types are not available for new claims and are not shown on any select lists, but any claims that have already been created using that type remain in the system and can be tracked.

Claim Type Colour Tag

The colour tag serves to distinguish between different types of claims in reports and lists by colour-coding individual claim types. All claims of the type are displayed with this colour in a block next to their title.

Claim Workflow

The workflow that should be following by claims of this type. Auth Levels are selected in order using the select boxes. The maximum number of steps in the workflow being limited by the number of levels that have been defined.

See also: SAR_authorization_level

Claim Unit

The unit within which this claim is being processed. In most cases this has little effect unless the claim must be authorized at the unit level (or is completed at the unit level)

The primary unit assigned for the person is automatically selected.

SMS Equipment

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Equipment is defined as individual pieces which are grouped into equipment types and can then be assigned to both people and assets. Reports are available that summarize what equipment has been assigned to people and the equipment assigned to an asset is displayed on their asset's information page.

Equipment Assignment

Specifies if this piece of equipment can be assigned to people, assets or both. The setting here controls if the equipment is available for selection when managing assets and/or people.

Equipment Description

A brief description of this piece of equipment providing any amplifying information associated with it's use and assignment.

Equipment Name

The name of this piece of equipment as it should be displayed throughout the system and presented in reports.

Equipment Reference

Some equipment has a reference number/ID that can be tracked along with the piece of equipment when it is assigned to a person and/or asset. If this field is populated with a title for the reference then an additional field will appear when assigning the equipment asking for that reference. If this field is left blank - no reference will be tracked with the equipment.

Some Examples

A pager - assigned to a person - should have a *phone number* as a reference.

An Engine - assigned to a vessel - might have a *power rating* as a reference (175 Hp)

Euipment Types

Table of Contents

Equipment types define the general classes of equipment that will contain the specified pieces of equipment to be attached to personnel and/or assets.

Equipment Types should be general - not specific (the specific pieces of equipment are defined as ´Equipment´ not ´Equipment Types´:

Some Examples of Equipment Types

Communications
First Aid
Navigation
Survival Gear
Spare Parts
  etc...

Note

Think carefully when creating equipment types - in general the fewer the better whenever creating something like a category - avoid redundancy and ensure each type is necessary. It is much easier to create extra types later rather then needing to reorganize everything.

Equipment Type Description

A brief description of this type of equipment - providing amplifying information that explains more about what equipment should be included and how it should be used.

Equipment Type Name

The name of this type of equipment. It should be entered as it will be displayed is select lists and reports.

Incident Action Description

A brief description of this incident type including any amplifying information that would help to explain it's use.

Incident Action Name

The name of this incident action as it should appear throughout the system.

SAR Alert Type

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This is the method by which the person requesting assistance alerted the SAR system.

Alerts from land/marine/air sources on scene should be identified as visual contact even if they reported the incident by radio. Only alerts from the vessel in difficulty are registered in VHF/HF/MF.

Incident Alert-Type Description

A brief description of this incident alert-type including any amplifying information that would help to explain it's use.

Incident Alert-Type Name

The name of this incident alert type as it should appear throughout the system.

SAR Incidnet Attachments

Use these *file* fields to attach photos of the incident. Images must be stored on your local computer. Select the file by clicking the browse button and the system will upload them and save them with the incident report when it is submitted.

There is no limit to the number of images that may be submitted. Three fields are displayed by default, If all three are used, update the report and more blank fields will appear (much the same as with the Events area)

Incident Detection Type Description

A brief description of this incident detection type including any amplifying information that would help to explain it's use.

Incident Type Description

A brief description of this incident type including any amplifying information that would help to explain it's use.

Incident Type Name

The name of this incident type as it should appear throughout the system.

SAR Incident Unit

Use the Unit drop-down to select the unit involved in this incident. If you are a member of a specific unit that unit will automatically be selected when the form is first created.

An incident involving multiple units is reported using multiple forms - one for each unit/vessel and crew.

See also: SAR_unit

Milestones

Table of Contents

Milestones are a very useful tracking tool that can greatly increase moral and provide automatic positive feedback to personnel based on their performance. It is based entirely on the data recorded in the system so it has the additional benefit of encouraging people to accurately record their activities.

Milestone Type

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Milestones are used to provide automatic tracking and notification of events based on statistics for personnel in the system. Administrators can use milestone types to define just what items are tracked and how and when notifications should be issued as a result.

Milestone Type Active/Inactive

Sets the milestone to active or inactive. inactive milestones are not scanned by the system during regular processing.

Milestone Admin Email

If there is an email address specified in this field then an administrative notification will be sent to that address whenever milestones of this type are achieved. If no administrative notification is desired, leave this field blank.

In addition to the email address there is a box to include additional information/instructions as part of the administrative email. This is only sent if the administrative email address is configured and is optional as most information about the milestone attained is included automatically.

Milestone Type Amount

The amount (count) that must be reached in order for the milestone to be attained. This is based on what the 'Object' is set to and the amount might specify a number of hours, a count, or years of service.

The amount must be a number without any units or punctuation.

Milestone Description

A brief description of the milestone type. This is generally used to provide more information for the future when revisiting milestone configurations within the system.

Milestone Attainee Email Message

The message box contains the message (if any) to send to whomever has attained the milestone. If no email is required, leave this box blank.

Attainee and Administrative emails are independent so the system can send either one or the other, or both based on which fields are populated.

An indication is presented next to milestone types in the management lists indicating which email notifications (if any) are configured for each type.

Milestone From Email
Allows the administrator to define the name and email address from which any milestone notification emails will be sent. This is especially useful if a response is expected from the recipient or if a notification of an error during the send should be redirected to a specific individual.

Milestone Name
The name of the milestone type - this is used in select lists and displayed on profiled for personnel that have attained this milestone.

Milestone Type Object
The object defines what is being tracked by this milestone. When defining the milestone type, select one of the available objects from the list. Whatever is selected is the item that will be matched against the *Amount* to test if the milestone has been reached.

For example
'Mission Hours' is selected as the object
'Person' is selected as the property
100 is set in the 'Amount'

In the above case the milestone will be attained when any person has recorded 100 or more hours of mission time.

Milestone Reporting Period
Configures the duration of time within which the amount specified must be reached in order for the milestone to be attained.

In most cases milestones are left as 'overall' which means they the tally is from all available data. However, in some cases you may wish to define a milestone that tracks something in a calendar or fiscal year instead of overall.

For Example
If you wanted to set a milestone that is attained once someone has completed 25 training exercises in a calendar year. The Period would be set to 'Calendar Year'

Milestone Property
The property defines at which level 'Person', 'Unit', or 'Overall' should be tracked when calculating if the milestone has been achieved.

For example
'Training Hours' is selected as the object
'Unit' is selected as the property
2000 is set in the 'Amount'

The milestone will be attained when the total training hours for unit as a whole reaches 2000 or more.

Other Agencies
Table of Contents

This dictionary contains a list of other agencies that may be involved in training, activities, and/or missions. These are then assigned on the various reporting forms used throughout the system to provide consistent statistics for involvement and training of these agencies.

Other Agency Active Flag
Sets the status of this agency - set to **Yes** in most cases but it can be set to **No** for an agency for which statistics exist but will no longer be tracked (rather then deleting it)

Other Agency Description
A description of the other agency.

Other Agency Name
The name of the agency - displayed throughout the system and used in selection of other agencies on reporting forms as entered.

SAR Training Item Signoff

Table of Contents

The Training Item Sigoff area provides trainers the ability to sign-off the various training items associated with a person's current training level. It also allows the person in question to review what items have already been signed off and what items still need to be completed.

For trainers:

When trainers use this form they will usually have just completed either a training exercise or some type of classroom training. They should select the date of that activity and then check off any items that the person successfully completed during that session. Once they click the update the form those items will be 'signed off' A note will be made in the log of the person being signed-off as to which item was signed off, when, and by whom.

Important Note:
Anyone signing off items should note that they are personally verifying that the person has met the standard and completed the required evaluation for the item(s) signed. One should be confident that in signing an item the person can perform to the standard in question as the name of the person signing the item will be retained in the system as the person who has completed the validation of the standard.

Signoff Items
This column contains the list of training items from the currently selected standard. Each item is a link to the definition from the training standard if more detail is required.

See also: SAR_training_level SAR_training_item

Training Signoff Level
Specifies what training level items are being signed-off. By default the person&acute;s current training level is automatically selected. To signoff or review items from a different level - change the level using the drop-down and update the list using the update button at the bottom.

See also: SAR_training_level

Signoff Signature
This column contains the name and date of the person that signed off the item (if it has been signed)

or

If it has not been signed, it contains either a check-box allowing the signoff of the item on the date specified above or notes explaining why it can not be signed off by the current user.

SAR Positions

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Positions refer to the positions held by personnel within the unit and/or organization. They can be used to indicate rank or job function and/or assigned tasks.

A person may have any number of positions.

Those who can manage a unit (as defined by system security) may assign positions to the personnel for that unit.

Positions have no direct relationship to training, certifications, or any other record in the system. Thus, they should only be used to indicate job function and/or rank and not to specify training levels and/or maintain a list of certifications.

Reports of personnel by position and counts by positions are available throughout the system.

Position Description
A brief description of the position - what it entails etc... Think of this as a job description.

Position Name
The name of the position as it will be displayed for selected in the personnel form and reported throughout the system.

Asset Reimbursement Rates
Table of Contents

The asset reimbursement rates control the rates used if reimbursement is provided during Activities, Training, and Missions. A different rate may be specified for each type of activity and different rate classes can be defined that are then assigned to the various assets.

Reimbursement Rate: Activities
The hourly rate for reimbursement during general activities. This is multiplied by the time reported on the Activity Form (where indicated) to calculate the reimbursement.

Rate Reference
A reference to distinguish why the rate changes on the specified date. This can be anything that will help identify the change in rates.

Rate Effective Date
The date at which this set of rates is effective. All reports starting at the specified date (until the next specified date if applicable) will have reimbursement calculated using these rates.

Rate Description
A description and/or any notes for this set of rates. It is a good idea to indicate to which types of asset these rates apply (ie: the attributes that distinguish the application of rates from any other rates)

Rate Name
A name assigned to this set of reimbursement rates. This will be what is selected from the drop-down list to assign the rate set to a particular asset.

Reimbursement Rate: Missions
the hourly rate for reimbursement during SAR Missions. This is multiplied by the underway time reported on the Incident Form (dock to Dock or minimum time as specified in the preferences whichever is greater) to calculate the reimbursement.

Reimbursement Rate: Training
The hourly rate for reimbursement during SAR On-water Training. This is multiplied by the time reported on the Training Form to calculate the reimbursement.

SAR Regions
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2. name   Region Name

Similar to zones, regions subdivide the area of coverage being tracked in the SMS. Generally speaking zones subdivide the area of coverage via geographic means whereas regions subdivide the area via administrative boundaries. All units belong to both a region and a zone but there need not be any correlation between zones and regions so they may act as distinct divisions for both reporting and statistics.

See also: SAR_zone

Region Description

A brief description of the region providing amplifying information about how this named region is divided from the entire area tracked by the SMS.

Region Name

The name if the SAR region. The area covered by the entire SMS system may be broken into regions - this specifies the name of a single region.

SAR Request Form

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Request Type

Table of Contents

Request types define the content, work-flow, and specifics for each different general classification of request to be tracked in the system.

eg: Travel Requests, Materials Requests, Special Requests etc...

Requests may be approved which in term can spawn an activity report and/or personal claims that are related to the request.

Request Type Description

A brief description of the request type that should help people understand what it is for and when to select it. This is displayed along with the request name in selection lists.

Request Type Included Information

These options control what information is included in the request forms of this type.

Date/Time Range

Set to yes to include date and time associated with the requests. All requests are date-stamped - this is used when the requests pertains to something that is to occur on a particular date. For example a supplies requisition probably wouldn´t have an associated date whereas a meeting room request would.

Personnel

Should a list of personnel be included.

Assets

Should a selection for assets used be included.

Multiple Units

Should multiple units be selected for the request or it is related only to a single unit.

Expense Budget

Should an estimation form for expenses (travel etc) be included.

Request Type Name

the name of the request type used in selection lists and displayed throughout the system. It should concisely describe the request type such that people can correctly select it when creating a request.

Request Type Options

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Options are additional questions to be asked on the request form. There can be any number of these and they can be set to different types of response.

Request Type Option Name

The option name is the question (or requested data) as it will be displayed to the user filling out the form.

Request Type Option Type

The type of response expected when the optional data is reported. The following types are permitted:

N/A

This option will be hidden.

Check-box

The user may check a box for this option.

Yes/No

The user must select either yes or no from a drop-down for this option.

Number

The user must enter a number in a field for a response.

Text Field

The user may enter a block of text as a response.

Request Type Status

Allows request types to be marked as active or inactive. Inactive request types are not available for new requests and are not shown on any select lists, but any requests that have already been created of that type remain in the system and can be tracked.

Request Type Colour Tag

The colour tag serves to distinguish between different types of requests in reports and lists by colour-coding individual request types. All requests of the type are displayed with this colour in a block next to their title.

Request Type Workflow

The workflow that should be followed by requests of this type. Auth Levels are selected in order using the select boxes. The maximum number of steps in the workflow being limited by the number of levels that have been defined.

See also: SAR_authorization_level

Resource Type

Table of Contents

This dictionary specifies different classifications of resources available and tracked in the system. Resources are attached to assets (vessels) and help to define how the asset is expected to be used.

Resource Type Description

A brief description of this resource type that provides any amplifying information and helps to explain how this type should be used to classify resources.

Resource Type Name

The name of this resource type as it should appear in select lists and reports throughout the system.

Searching For People

When searching for a person it is recommended to use either they first or their last name but not both. Select whichever name is less common and search for that. For example - when searching for Clohe Smith - search for 'Clohe' rather then 'Smith'

Personnel Status

Table of Contents

A dictionary containing any number of status settings to be applied to personnel within the organization. These can be used to categorize personnel and/or for statistical reporting.

Personnel Status Description

A brief description of this status indicating what sets it apart from the others and providing any amplifying information.

Personnel Status Name

The name of this status setting. Displayed in reports and in selection lists for assignment on the personnel record.

SAR Training Report

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Training Categories
Table of Contents

Training categories identify the main categories of training exercises and/or classroom sessions that have been conducted.

Multiple training categories can be selected on training and classroom forms.

When making a distinction between training Types and Categories - the categories are more general - typically used to identify the level at which the training was aimed whereas the type will identify the more specific training goals of the session.

Training Category Description
A brief description of this training category providing any amplifying information and explaining when this type should be selected.

Training Category Name
The name of this training category as it should appear throughout the system in select lists and reports.

Training Items
Table of Contents

Training Items are the components that make up the various training levels. Each item is defined in the system and assigned as a component of a training level - the idea being that once all the items in a level have been completed by a person - they have completed the level.

See also: SAR_training_level

Training Item Attitude
The attitude that must be presented as part of this training item.

Training Item Description
A brief summary of the training item. The description, in this case, can be thought of as a short summary of the *Skills*, *Knowledge*, and *Attitude* components of the training item.

Training Item Evaluation
A detailed description of how this training item should be evaluated. This should provide instructions to the personnel that will conduct evaluations such that these will be consistent across the organization.

Training Item Knowledge
The knowledge that must be understood as part of this training item.

Training Item - Associated Level
The training level that this items belongs to - selected from the list of existing training levels.

See also: SAR_training_level

Training Item Name
The name of this training item as it should appear in select lists and reports throughout the system.

Training Item Optional Flag
Specifies if this item is required in order to complete the associated training level. Optional items are completed in the same manner as regular 'Required' items however the training level can be completed without them.

Training Item - Required Signoff Level
This selection allows the assignment of by whom this item can be 'signed-off':

If 'Any' is selected then any member permitted to sign-off items (as defined in their personnel profile) will be able to signoff the item for other members.

No person may sign-off their own training items

If an existing training level is selected from the list then only personnel that have attained that level will be permitted to sign off this item.

If '*Security Based*' is selected then the user must have the *special signoff security option* set in their security profile in order to signoff this item. This setting is generally used at higher training levels in order to provide a high-level administrative control that governs evaluators within the organization.

Training Item Skills
The skills that must be demonstrated as part of this training level.

Training Item Related Types
A multi-selection of related training types. This provides a cross reference between training items and the more general training types. This cross-reference is used by the system when creating training plan reports.

See also: SAR_training_type

Training Levels
Table of Contents

Training levels are used in the SMS to record and track the standards of training within the organization. Each level is made up of many items and can include require certifications.

As the individual items are signed-off in a person's log the level becomes closer to being complete. Once all the required items have been completed the level itself can be assigned to the person.

From that point on if there are certs associated with the level the system will monitor to see if any of those certs have expired and notify the appropriate people if they should.

Each person's training levels are displayed on their profile page and the highest level attained may impact their ability to sign-off other members' items based on system settings.

The levels attained and items still required also impact some reports and how the system tries to suggest training in training plans.

Training Level Required Certs
Select any certifications that are required in order to attain and maintain this training level. The system will automatically monitor the certs selected and ensure that any people that hold this level maintain the specified certs and send notifications to the appropriate people should they expire.

See also: SAR_cert

Training Level Description
A description of this training level including any amplifying information that should be displayed to users. The description is displayed on the report that shows the entire training level including all associated certs and training items.

Training Level Items
Each training level can have any number of associated items. If the level is the standard to attain, then the items are each of the stepping stones along the way that must be attained in order to meet that standard.

Training Level Name
The name of the training level as it should be displayed in select lists and reports throughout the system.

Next Training Level
Selected from a list of training levels that have already been defined - this sets which training level should be started once this level has been attained.

If this is the highest training level select 'none'

Because the next higher level must exist before it can be selected, administrators may need to return to the training level form and update this information once the other levels have been created.

Training - Mark Complete
Marks the form complete and locks it for editing.

View the ´mark-complete´ topic below for more detail.

See also: mark-complete

Training Types
Table of Contents

1.active   Training Type Active Flag

2.description Training Type Description

3.name   Training Type Name

Training types identify the specific types of training that have been focused upon during an exercise or classroom session.

Multiple training types can be selected on report forms.

When making a distinction between training Types and Categories - the categories are more general - typically used to identify the level at which the training was aimed whereas the type will identify the more specific training goals of the session.

See also: SAR_training_category

Training Type Active Flag
The active flag allows certain training types to be marked inactive. Inactive types are used to stop a type from being used for any future reports while still retaining historical statistics from reports that used that type in the past.

Training Type Description
A brief description of this training type including any amplifying information that identifies when this type should be selected.

Training Type Name
The name of this training type as it should appear on select lists and reports throughout the system.

SAR Unit

Table of Contents

1.address   Unit Mailing Address

2.allotment   Training Hours Allottment

3.description   Unit Description

4.entity   Unit Operating Entity

5.name   Unit Name

6.notification   Unit Notification Email

7.number   Unit Number

8.phone-contacts Unit Telephone Contacts

9.region   Unit Region

10.status   Unit Status

11.website   Unit Web Site

12.zone   Unit Zone

Unit Telephone Contacts
These three name and phone contacts are used to provide the primary contacts for a unit - **in order or priority**. This information is used on the vessel and unit reporting forms to indicate to SAR controllers whom to contact in the event of any difficulty maintaining contact or achieving a response through normal means (ie: pager, VHF, etc)

These contacts may be overridden for a specific asset on that asset´s record for example if a unit has several assets and all but one have the same primary contacts.

See also: SAR_vessel

Unit Status

The unit status indicates if a unit is active (ie displayed in lists etc) or inactive. Inactive units are generally either administrative units that are retained for statistical reasons or old units that no longer exist but for which historical data is retained in the system.

Once a unit has had data collected it should not be deleted as this would compromise historical data - it is for precisely this reason that the inactive status can be used to prevent it from being used for future reporting.

Unit Web Site

If a unit has their own web site it can be specified here. When provided the public unit list will contain a link to this web site, it will also be displayed on the main information page for this unit as a link in the header.

SAR Vessel

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The name, configuration, specifications, location, and equipment carried aboard a SAR vessel.

This information is important to JRCC so please ensure it is correct. Also, be sure to check the vessel map report when finished to varify that the lat/long has been entered correctly (the vessels should be plotted at the correct positions on the map)

AIS Enabled Flag
Set to yes if the vessel has an Automatic Identification System **Transponder** installed and operational. This flag should only be set to 'Yes' if the vessel is actively transmitting it's position while underway. Vessels that are equipped with only an AIS receiver should set the flag to 'No'

Asset Contacts
Several reports in the system include contact details for Units and Assets. In general when contact information is provided for a unit it will also be included as the contact information for all assets associated with that unit.

If a particular asset has specific contact information that is different then that for the unit it should be reported here and any information provided will override that provided for the unit.

The contact information from the Unit record that will be overridden is displayed below the name and phone number fields for reference.

Asset Draft
The distance between the asset's keel and waterline - the amount of water required for it to float.

The measurement should be specified in **feet**

Asset Assigned Equipment
The various equipment typically carried aboard the vessel including fixed navigation and propulsion gear.

Vessel equipment is predefined by administrators grouped into types and individual vessels can specify a quantity for each item. Items not carried on the vessel or not applicable should be left at a quantity of 0.

Some pieces of equipment include a field for additional reference data. In those cases a label; specifying what information is requested will be displayed along with a field to enter that data.

Gross Tonnage
The gross registered tonnage of the asset. If the vessel has no GT specify **1**

Asset Image
An accurate image of the asset. The selected image should be clear and show the asset's construction and features more then any one specific detail. Ideally the image would allow a knowledgeable person to summarize the capability of the asset at a glance.

Asset MMSI
If a Maritime Mobile Service ID (MMSI) has been assigned for this asset's communications gear it should be recorded here. MMSI numbers at 9 digit numeric identifiers of the form:

CCCXXXXXX

Where CCC is the Country Code (316 = Canada)
and XXXXXX is ID for the individual station.

Asset Owner
The official name of the owner of the asset (assuming it is not owned directly by the entity that administers the SMS) - This is used when reporting for reimbursement of expenses and activities as the vessel owner is printed on the report.

Asset Owner Address
The mailing address of the owner of the asset (again assuming that the asset is owned by an entity other then that administering the SMS) This address is included on reports and is helpful with providing reimbursement to asset owners for expenses and activity time.

Asset Resource Type

Assets can be classified as one of several resource types. This is mainly used for administrative division in the system and the values are configured by administrators:

Several Possible Examples

DRV = Dedicated Response Vessel.
Co-Crew = An asset shared between this and another organization but owned by the other organization.
Owner/Op = An asset owned by the person that operates it.
Relief = A shared asset used as a hot standby.

See also: SAR_resource-type

Global Vessel
An asset can be marked as 'Global' which will add it for use across all units. This is used when an asset is shared by many different units (for example a hot-standby or spare asset) Global Assets are marked in reports as being global with an indicator.

Asset Value

The current fair market replacement value of the asset. This figure is used for insurance proposes.

Asset Year Built

Specify the year in which the asset was constructed (used for insurance and maintenance purposes)

SMS Zones

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Similar to regions, zones subdivide the area of coverage being tracked in the SMS. Generally speaking zones subdivide the area of coverage via geographic means whereas regions subdivide the area via administrative boundaries. All units belong to both a region and a zone but there need not be any correlation between zones and regions so they may act as distinct divisions for both reporting and statistics.

See also: SAR_region

Zone Description

Amplifying information describing this zone - identify the delineation of the zone and any special considerations associated with it´s division from the area of coverage.

Zone Name

The name of this zone