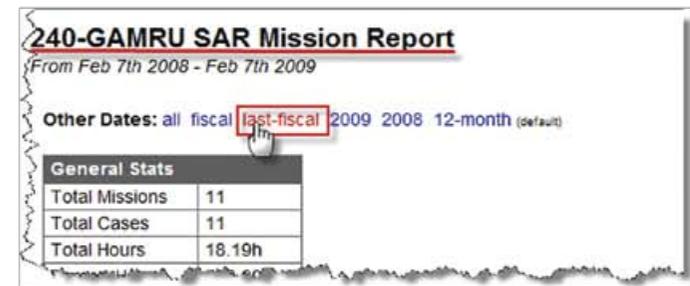
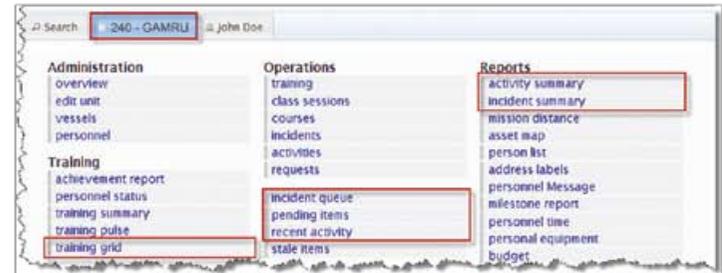


## Unit Leader Summary

1. As a **Unit Leader** you have access to parts of the SMS system that allow you to view information submitted by other members of your unit. There are a number of report summary pages that can be viewed from the **Main Menu**.

2. By selecting **incident summary** from under the unit tab (e.g. **240-GAMRU**) in the **Main Menu** you can view all the incident reports submitted by your unit. In the incident summary page you can also see where submitted reports stand in their authorization process.

3. At the top of the **incident summary** page you can narrow the amount of information you're seeing on the page by selecting all, **fiscal**, **last-fiscal**, **12-month**, etc. This will display data that was submitted within the selected time period.



4. The various charts and graphs provided on the [incident summary](#) page use data from reports that have been submitted into the SMS system.

**Missions Based on Sea State/Visibility**

Sea State:	Day:		Night:	Total
	Normal Vis:	Restricted Vis: Nor		
calm	2	--		
2	3	--		
3	1	--		
<b>Totals</b>	<b>6</b>	<b>0</b>		

**Busy Members By Missions**

Person:	Unit:	Hours:	Missions:
GLEN ALLISON - 2816	240-GAMRU	6.27	5
TERRY ROSSI - 1636	240-GAMRU	8.97	4
CORY BROAD - 3947	240-GAMRU	7.60	4
SCOTT ST. GEORGE - 3909	240-GAMRU	6.97	4
ALLAN PLATT - 2378	240-GAMRU	7.92	3
MIKE SPENCER - 3907	240-GAMRU	5.95	3
MICHAEL DIETL - 2375	240-GAMRU	5.87	3
ERIC TAYLOR - 1784	240-GAMRU	5.32	3
KYLE RUSSELL - 3911	240-GAMRU	5.02	3
CHANTAL BEAUDOIN - 3914	240-GAMRU	4.77	3

5. Similar to the [incident summary](#) page, the [activity summary](#) page allows you to see the data collected by the activity reports submitted into the SMS system. Access this page by selecting [activity summary](#) from the unit tab (e.g. 240-GAMRU) in the Main Menu.



6. Once again, you can narrow the amount of information you're seeing on the page by selecting [all](#), [fiscal](#), [last-fiscal](#), [12-month](#), etc. This will display data that was submitted within the selected time period.

**911-Admin Unit - CCGA CA HQ Activity Report**

Sep 14th 2008 - Sep 14th 2009

Other Dates: all **fiscal** last-fiscal 2009 2008 12-month (default)

Type	Count	Hours	Avg. Hours	Person Hours	Avg. Duration
Administration	4	13.5	10.85	15.0000	3.38
<b>Totals</b>	<b>4</b>	<b>13.5</b>	<b>10.85</b>	<b>15</b>	<b>3.38</b>

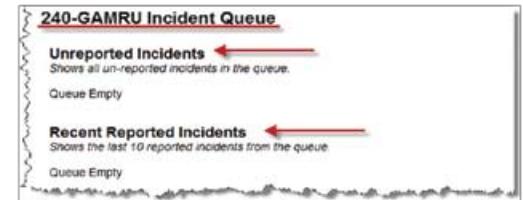
7. The [activity summary page](#) allows you to see data logged from activities that are not contained in an incident report. For example vessel maintenance or administration activity data will be displayed in the [activity summary page](#).

Type	Count	Hours	Avg. Hours	Person Hours	Avg. Duration
Vessel Maintenance	2	4	1.19642857	12.0000	2.00
Administration	11	196	3.97193878	196.0000	17.82
Training/Curriculum Development	2	9	0.520408163	41.0000	4.50
<b>Totals</b>	<b>15</b>	<b>209</b>	<b>5.68877551</b>	<b>249</b>	<b>13.93</b>

8. The [incident queue](#) will allow you to view the status of authorization for all incident reports submitted by your unit. To access this page, select [incident queue](#) from the unit tab (e.g. [240-GAMRU](#)) in the [Main Menu](#).



9. Here, you can view the status of all incident reports submitted in the given season. Once reports have been closed, they will not appear in the [incident queue](#).



10 As a Unit Leader, you may view the authorization status of any forms that have been submitted by your unit. Under the unit tab (e.g. [240-GAMRU](#)) in the [Main Menu](#) select [pending items](#).



11. Here you can see a summary of anything that still needs to be authorized by someone. This includes forms relating to training exercises, classroom sessions, courses, missions, requests, activities, certs, etc. You can view and/or edit information in these forms as it applies by selecting the **edit** or **view** buttons if they appear beside the forms listed. If you are not authorized to view and/or edit these forms these buttons will not be visible. Note that "Open" means not started yet. Please edit to proceed.

	Date:	Activity:	Status:
<a href="#">view</a>	February 5th, 2009	Changed Engine Oil (2h)	Pending Unit Level
<a href="#">edit</a> <a href="#">delete</a> <a href="#">view</a>	August 27th, 2008	D2 Administration (20h)	Open
<a href="#">view</a>	June 1st, 2008	SAR ex lake Erie OCC (4h)	Pending Training Manager
<a href="#">view</a>	May 31st, 2008	SAR Ex OCC (5h)	Pending HQ Administrative

## Unit Activities Overview

1. You can get a quick overview of all the recent activity in the system (reports, requests, Incident reports, training summaries, classroom summaries, etc.) by selecting **recent activity** from the unit tab (e.g. 240 GAMRU in the Main Menu).

Search: 240 - GAMRU John Doe

Administration	Operations	Reports
<a href="#">overview</a>	<a href="#">training</a>	<a href="#">activity summary</a>
<a href="#">edit unit</a>	<a href="#">class sessions</a>	<a href="#">incident summary</a>
<a href="#">vessels</a>	<a href="#">courses</a>	<a href="#">mission distance</a>
<a href="#">personnel</a>	<a href="#">incidents</a>	<a href="#">asset map</a>
	<a href="#">activities</a>	<a href="#">person list</a>
	<a href="#">requests</a>	<a href="#">address labels</a>
<a href="#">achievement report</a>		<a href="#">personnel Message</a>
<a href="#">personnel status</a>	<a href="#">incident queue</a>	<a href="#">milestone report</a>
<a href="#">training summary</a>	<a href="#">pending items</a>	<a href="#">personnel time</a>
<a href="#">training pulse</a>	<a href="#">recent activity</a>	<a href="#">personal equipment</a>
<a href="#">training grid</a>	<a href="#">stable items</a>	<a href="#">budget</a>

2. In this page you can view the various reports and forms being submitted by selecting the **view** button beside each given form. The recent activity page is a good place to see all the information your unit has been uploading in one place.

	Date:	Training:	Status:
<a href="#">edit</a> <a href="#">delete</a> <a href="#">view</a>	February 5th, 2009	(4h)	Open
<a href="#">view</a>	August 16th, 2008	Lake Ontario Swim Crossing (Second half of event) #08TSK78 (15h)	Closed
<a href="#">view</a>	August 15th, 2008	Lake Ontario Swim Crossing (First half of event) #08TSK78 (15h)	Closed
<a href="#">view</a>	August 2nd, 2006	Night SAR EX #08TSK63 (4.5h)	Closed
<a href="#">view</a>	August 2nd, 2006	Night SAR EX #08TSK63 (4.5h)	Closed

3. The **training grid** is a section of the SMS system that is of interest to both Unit leaders and training officers. The training grid can be accessed by selecting **training grid** from the unit tab (e.g. 240-GAMRU) in the **Main Menu**.



4. Within the **training grid** you can view the level of training that each member of your unit has achieved or is in the process of achieving. The percentages displayed represent the amount of knowledge that has been achieved and logged into the system towards a given ranking.

Person	Advanced Crew	ARTE	Coxswain	Crew	New Crew
TERRY ROSSI - 1636	0.0%	0.0%	0.0%	0.0%	0.0%
ERIC TAYLOR - 1704	0.0%	0.0%	0.0%	0.0%	0.0%
BRENT GORZYNSKI - 2154	0.0%	0.0%	0.0%	0.0%	0.0%
PETER GRAHAM - 235	0.0%	0.0%	0.0%	0.0%	0.0%
MICHAEL DIETL - 2375	0.0%	0.0%	0.0%	0.0%	0.0%
ALLAN PLATT - 2378	0.0%	0.0%	0.0%	0.0%	0.0%
DAVE BEDARD - 2489	0.0%	0.0%	0.0%	0.0%	0.0%

5. You can update information as your unit members complete training and achieve qualifications by selecting their name from the list.

Person	Advanced Crew	ARTE	Coxswain	Crew	New Crew
TERRY ROSSI - 1636	0.0%	0.0%	0.0%	0.0%	0.0%
ERIC TAYLOR - 1704	0.0%	0.0%	0.0%	0.0%	0.0%
BRENT GORZYNSKI - 2154	0.0%	0.0%	0.0%	0.0%	0.0%
PETER GRAHAM - 235	0.0%	0.0%	0.0%	0.0%	0.0%
MICHAEL DIETL - 2375	0.0%	0.0%	0.0%	0.0%	0.0%
ALLAN PLATT - 2378	0.0%	0.0%	0.0%	0.0%	0.0%
DAVE BEDARD - 2489	0.0%	0.0%	0.0%	0.0%	0.0%

6. By selecting the percentage listed under the level the person is working towards completing, you can view a list of topics at which a person should be competent before reaching the given level of certification.

Person	Advanced Crew	ARTE	Coxswain	Crew	New Crew
TERRY ROSSI - 1636	0.0%	0.0%	0.0%	0.0%	0.0%
ERIC TAYLOR - 1704	0.0%	0.0%	0.0%	0.0%	0.0%
BRENT GORZYNSKI - 2154	0.0%	0.0%	0.0%	0.0%	0.0%
PETER GRAHAM - 235	0.0%	0.0%	0.0%	0.0%	0.0%
MICHAEL DIETL - 2375	0.0%	0.0%	0.0%	0.0%	0.0%
ALLAN PLATT - 2378	0.0%	0.0%	0.0%	0.0%	0.0%
DAVE BEDARD - 2489	0.0%	0.0%	0.0%	0.0%	0.0%

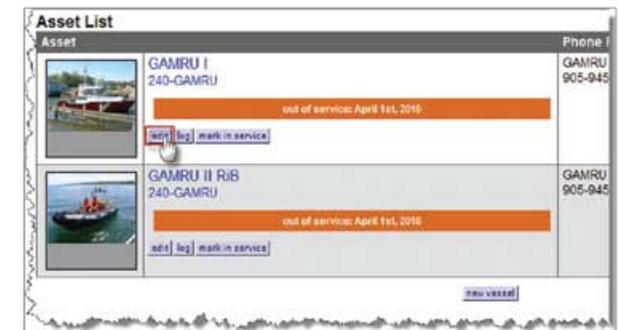
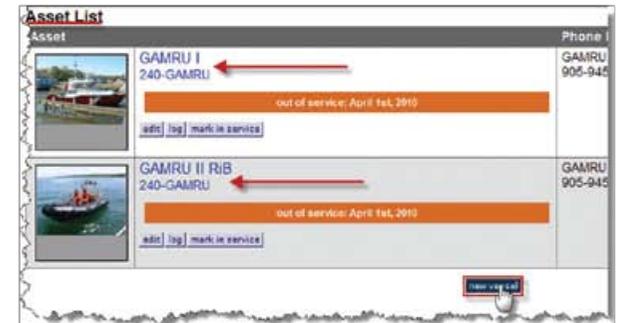


## Vessel Information

1. In addition to the Administration options that are accessible from a Coxswain SMS account, there are a number accessible only through a Unit Leader account including the Vessel Information page. On this page you can update information on the vessels associated with your unit. Access the Vessel Information page from the Main Menu under the unit tab (e.g. 240-GAMRU).

2. You will now be able to see a list of the vessels associated with your unit.

3. To edit the information in the system about a given vessel, select edit.



4. This form will allow you to see the information currently associated with the vessel and allow you to make changes as necessary. Use the various drop-down menus and text fields to adjust any information that is no longer up-to-date. It is important to maintain up-to-date information in this section as the data within this page is automatically filled into other forms as needed.

5. Once you have completed any updates or changes on this page, select update at the bottom of the page.

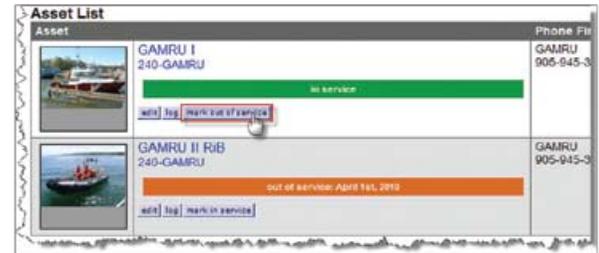
## Marking a Vessel In / Out of Service for the Season

1. To mark your Vessel in or out of service for the season, access the unit tab (e.g. 240-GAMRU) and select **Vessels** from the **Administration** list. This will bring you to a listing of all vessels associated with your unit.

2. If you are marking the vessel in service for the season, click the **mark in service** button.

Asset	Phone No
GAMRU I 240-GAMRU out of service: April 1st, 2008	GAMRU I 905-945-3
GAMRU II RIB 240-GAMRU out of service: April 1st, 2008	GAMRU II 905-945-3

H. If you are marking the vessel out of service for the season, click the [mark out of service](#) button.



4. A pop up box will appear. Use the up / down arrows to select the times / dates that you plan to have the vessel out of service and when it is expected to return. Once you have changed the dates, click [Mark Out of Service](#). That date will be recorded and saved.



## Personnel Records Assign Rights

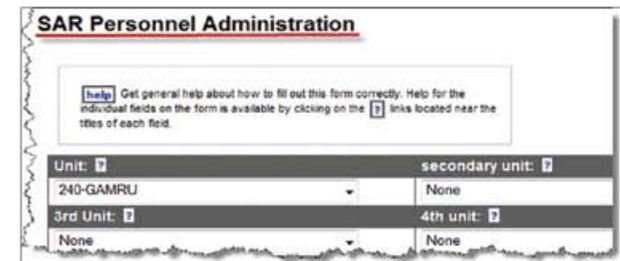
1. As a Unit Leader, you can also edit the information and rankings of the **personnel** in your unit. To edit and view information about the personnel in your unit, select **personnel** from the unit tab (e.g. 240-GAMRU) in the **Main Menu**.



2. Here you will see a list of the personnel currently associated with your unit. To edit the information associated with a given member, select the **edit** button located beside the member's name.



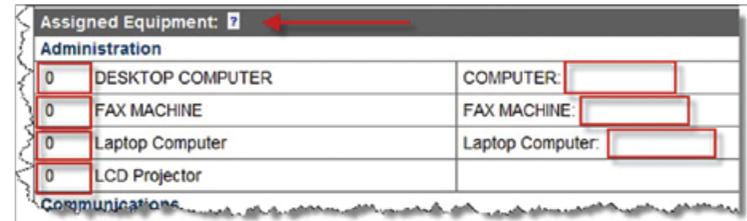
3. On this page you can also change the member's role in the unit. Some of the information about a given person will be entered into the system by the office when they first become a member. This information will automatically be accessible to their unit's leader via this page.



4. You may select the level of the given member in the **Unit Roles** section - [Coxswain](#), [Deputy Unit Leader](#), [UPO](#) or [UTC](#) - by checking the appropriate box.



5. In the **Assigned Equipment** section you can indicate if any loan-out equipment has been assigned to this unit member. Enter the number of items or the equipment model/serial number into the appropriate fields.



Administration	
0	DESKTOP COMPUTER
0	FAX MACHINE
0	Laptop Computer
0	LCD Projector

Communications

6. If there are any additional notes about the member you would like to include, you may enter this information into the **Notes** section of this page. There is no limit to the amount of text you can type in this text field.



7. Once you have updated the necessary information on the page, select [update](#) at the bottom of the page to submit and save the information entered.



## Updating Certifications for Unit Members

1. To update the certifications for a member of your unit, select personnel from the unit tab (e.g. 240-GAMRU.)

2. Select the member whose certification is being updated by clicking on their name. This will load their SAR Profile on the screen. It will also change the tab at the top from your name (e.g. John Doe) to the selected member's name (e.g. Juanita Armstrong).

3. Now, from the Main Menu Select Certs from within the name tab (e.g. Juanita Armstrong). This will bring up a list of certs already in the system for the selected member.

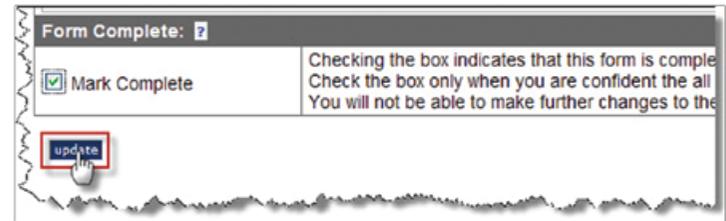
4. To upload a new certification into the SMS, click the [new cert](#) button.



	Date:	Expiry:	Cert:	Statu
<a href="#">edit</a> <a href="#">delete</a> <a href="#">view</a>	November 24th, 2009	never	DSC	Open
<a href="#">edit</a> <a href="#">delete</a> <a href="#">view</a>	July 16th, 2009	July 16th, 2014	SAR Course	Open
<a href="#">edit</a> <a href="#">delete</a> <a href="#">view</a>	February 20th, 2009	never	PCOC	Open
<a href="#">view</a>	April 27th, 2008	never	ROC #685082ARM	Pend

5. To complete this form follow the standard steps involved in submitting a form. These steps are outlined in the [Saving / Updating / Submitting Forms](#) section and are standard to all forms in the system.

Follow the same steps for submitting a new certification form. These steps are outlined in the [Certification Form](#) section.

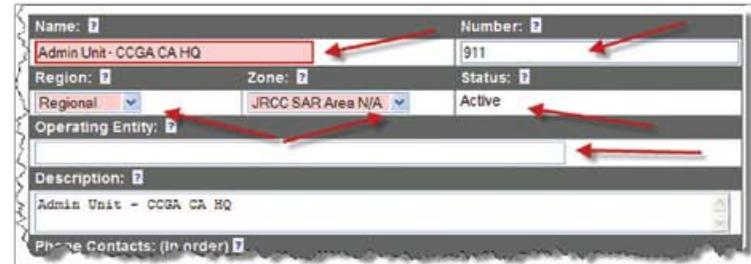


## Updating Unit Information

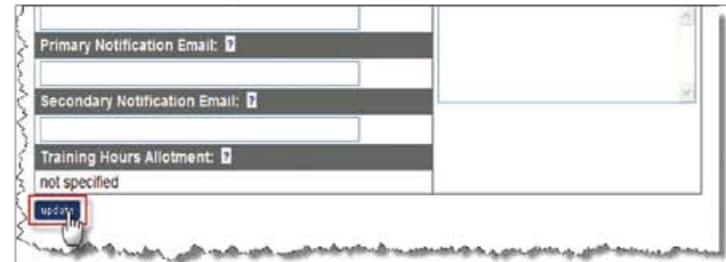
1. To edit your unit's contact information, select edit unit found under the unit tab (e.g. 240-GAMRU) in the Main Menu.



2. Use the various text fields and drop-down menus to update all the appropriate info for your unit.

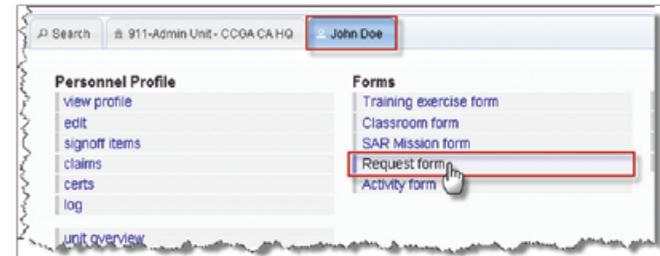


3. Click the [Update](#) button at the bottom of the page once you have finished updating the information.

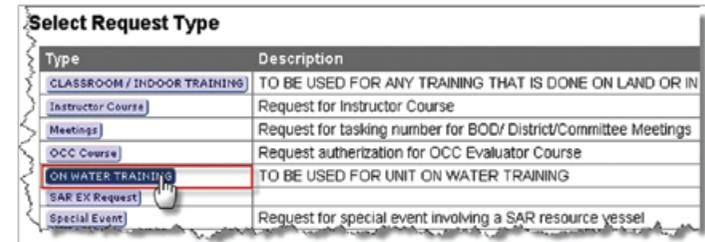


## Requesting a Tasking Number

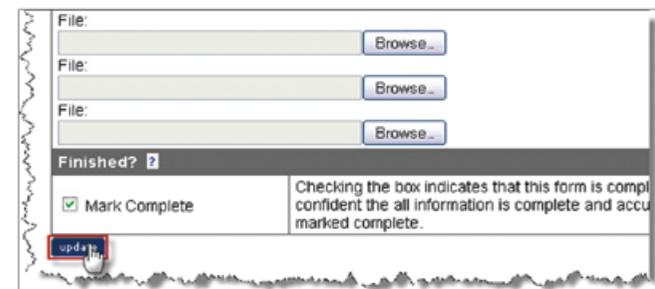
1. To put in a request for a CCGA tasking number for authorization to attend an event or training, select [Request form](#) from under the name tab (e.g. [John Doe](#)) in the [Main Menu](#).



2. You will see a list of possible request types. Choose the appropriate request form.



3. Make sure the form is fully completed as accurately as possible and follow the standard submission steps.



4. You will then be required to review and sign off at the appropriate level by hitting the **Authorize** button.

**Signoff: Pending: Unit Level**  
November 24th, 2009 11:00:55 Created By: John Doe

Date	Level	Action	Person	Flags	Notes
Pending	Unit Level				
Pending	District Director				
Pending	Auxiliary Activity Coordinator				
Pending Authorization: Unit Level					

Authorize As:  Notes:

Flags:

5. Once the request has gone through the full approval process, the system will send an email to the person that originated the request. At that point they can log into the system to view the tasking number that has been issued.

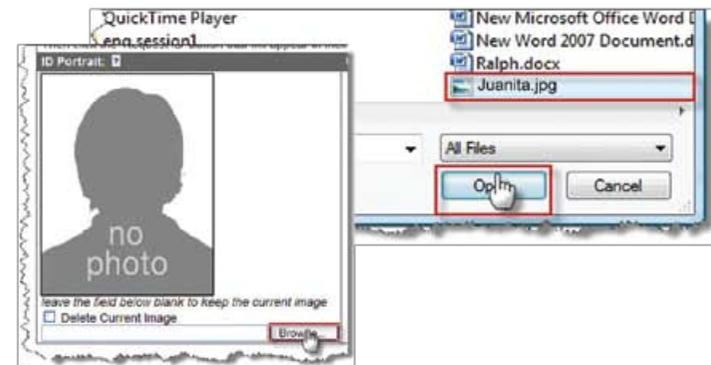


## Requesting a CCGA ID Card

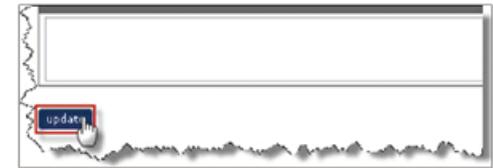
1. To request a **CCGA ID Card** for a member of your unit, select Personnel from the unit tab (e.g. 240-GAMRU).

2. Select the edit button beside the name of the member for whom you would like to add a photo and request a CCGA ID card.

3. Upload the appropriate photo file from your computer by clicking the **browse** button under the **ID Portrait** section. Locate and select the photo file you would like to upload onto your profile. Photo files with the designation **.jpg** are best. Once you have selected a picture, press **Open**.



4. Once you have uploaded the file hit the [update](#) button at the bottom of the page.



5. The page will load back to the [personnel page](#). The camera icon beside the member's name will have changed from grey to blue, indicating that a photo has been uploaded.



6. Click on the member's name to bring up their [SAR Profile](#).



7. There will now be a [Request ID](#) button under their photo. Click this button to request a CCGA ID be issued for this member.

