Commanding Officer
U.S. Coast Guard
Operations Systems Center
Kearneysville, WV 25430

AUXDATA Overview Guide

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FOR OFFICIAL USE ONLY

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1. PREFACE

1.1 Purpose

This document has been developed to provide United States Coast Guard (USCG) Auxiliary users with instructions and information necessary to use the Auxiliary Data (AUXDATA) system. The goal of this document is to provide the Auxiliary with an Overview Guide for training new personnel and guidelines for using the AUXDATA system.

The purpose of Auxiliary Data (AUXDATA):

- Accurately quantify the activities of the membership of the USCG Auxiliary and to be able to produce a current record of those accomplishments in a variety of cumulative report formats
- Provide up-to-date data and statistical information necessary to define the Auxiliary's value and position in the USCG family. Such information shall be used by the USCG in presentations before the executive, legislative, and judicial branches of the Federal, State, and local government agencies, as well as for intra- and inter-service and Public Affairs (media) needs
- Provide an accurate depiction of Auxiliary member and facility capabilities to the Operational Commanders of the USCG needing or contemplating the use of the Auxiliary in accomplishing their missions
- Maintain an automated national database for the Auxiliary organization with extractable information/data sets available to the various organizational levels - from member to National.

1.2 Intended Audience

The following is a list of groups for whom this document was created:

- Assistant Commandant of Operations (G-O)
- Office of Auxiliary (G-OCX)
- District/Director of Auxiliary (DIRAUX)
- Division
- Flotilla

1.3 Style Conventions

This document uses specific type styles to differentiate commands, directory names, and so forth from the main text. The OSC Documentation SOP describes the use of type styles for this purpose.

1.4 Security and Privacy

Increased security has been added to the AUXDATA application. The ability to create, read, update, and delete data in the centralized system is based on the user's role and position. User Identification (ID) and passwords to the system indicate the allowable permission level a user has and prevent users from performing any actions in AUXDATA beyond the scope of their level.

The USCG has migrated to a Web-based environment using the USCG Standard Workstation III (SWIII). AUXDATA, which is a Solaris-Oracle Internet Explorer (IE) application, is Web-based and runs on any workstation or laptop that supports the Microsoft (MS) IE Web browser, which includes all SWIII computers. Architecturally, the Auxiliary Management Information System (AUXMIS) II legacy system moved from a Computerized Tomography Operating System (OS)-based system to become AUXDATA in a MS Windows NT environment.

2. AUXDATA FUNCTIONALITY

AUXDATA has its own built-in navigational tools, which include various menus and return links. **Do not** use the browser's **Back** and **Forward** buttons to navigate through AUXDATA. The menu items and the return links (when available) may be used at any time to navigate while logged on to the system. Buttons represent all menu items and return links. When clicked with the mouse, the buttons link to a new page or a previous part of the application.

Figure 2-1 shows the AUXDATA main menu:

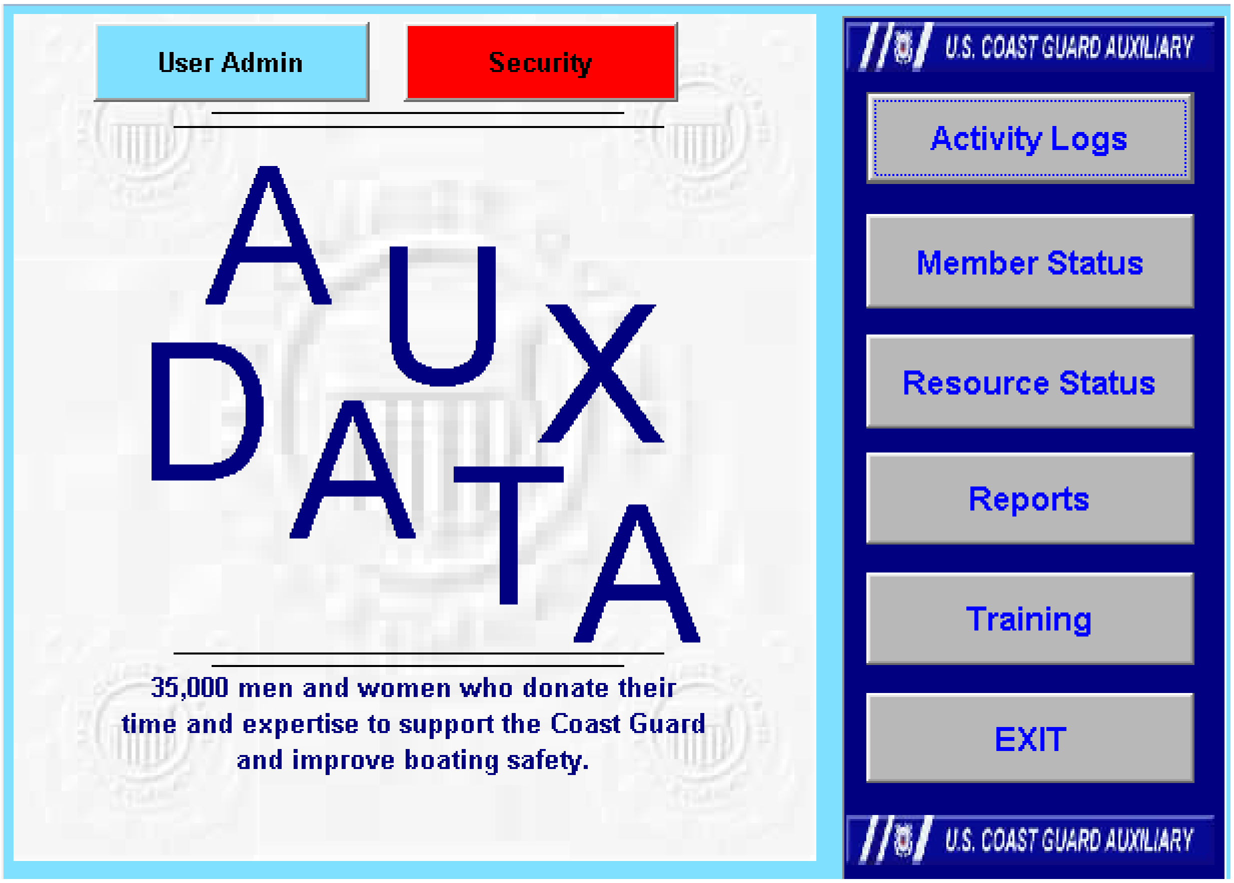


Figure 2-1 AUXDATA Main Menu

***NOTE**: **USER ADMIN** and **Security** buttons are only available to users with those permissions.*

2.1 Main Menu Overview

Click any of the AUXDATA main menu options to use each tool. A general description of each mouse-activated menu option is listed below:

The **Activity Logs** feature allows users to view, create, or modify the activity log class data for aircraft, boats, radios, and units. This feature also allows users to record the progress of task training for crewmembers. Activity approvals are performed through the **Activity Logs** feature.

The **Member Status** feature allows users to record the status of members of the unit and any subordinate units.

The **Resource Status** feature allows users to view, update, and insert information on the resources listed for the unit.

The **Reports** feature allows users to run an AUXDATA report of choice.

The **Training** button links to the Training Management Tool (TMT) application.

Clicking the **Exit** button logs the user off of the AUXDATA application.

2.2 Capabilities

AUXDATA's capabilities include increased system security, ad hoc query/reporting, file downloading, and a graphical user interface (GUI).

AUXDATA provides functionality consistent with the AUXMIS II legacy system. AUXDATA, under a Red Hat Linux platform, is a GUI application and uses MS Windows screen objects, such as drop-down menus, shortcut menus, command buttons, option buttons, and so forth.

2.3 Access to Information

The USCG AUXDATA centralized database resides at the Operations Systems Center (OSC). Through Web browsers, users may access the same central database, from any location with a user ID and password, to perform daily tasks. This central database is updated in real-time, meaning the instant a user modifies or enters data in the system, all other users may view the current data.

2.4 Web Functions

As a Web-based system, AUXDATA requires certain data entry and procedural actions for the best results. This section and its subsections discuss some important tips to use when working with AUXDATA.

2.4.1 Date Field Formats

All days are to be treated as 24-hour days. Disregard the artificial effects of changing between Standard and Daylight Savings Time or crossing time zone boundaries. The Zulu offset must be adjusted before entering any dates into the system.

When entering dates in AUXDATA, pay close attention to the formats specified for a particular **Date** field. The following are two examples of the various formats encountered in AUXDATA:

- **Date Only:** *{DD-MON-YYYY}*, where *{DD}* is the two-digit day, *{MON}* is the first three letters of the month, and *{YYYY}* is the year
- **Date and Time:** *{DD HHMI MON YYYY}*—Date-Time Group (DTG) format, where *{DD}* is the two-digit day, *{HH}* is the hour on a 24-hour clock, *{MI}* is the minutes, *{MON}* is the first three letters of the month, and *{YYYY}* is the year.

In some cases, users can see the prescribed format by pointing the cursor to the **Date** field and, without clicking it, letting the cursor hover over the **Date** field for a second of time.

*A **Date Format** message appears specifying the format to use (for example,* Date Format DD-MON-YYYY*).*

Most of the AUXDATA reports allow users to enter a date into a **Date** field by using the Calendar feature. To enter a date into a **Date** field using the Calendar feature, perform the following steps:

1. Click the **Date** button (for example, Start Date) above the **Date** field.

   The Calendar appears, similar to the following:

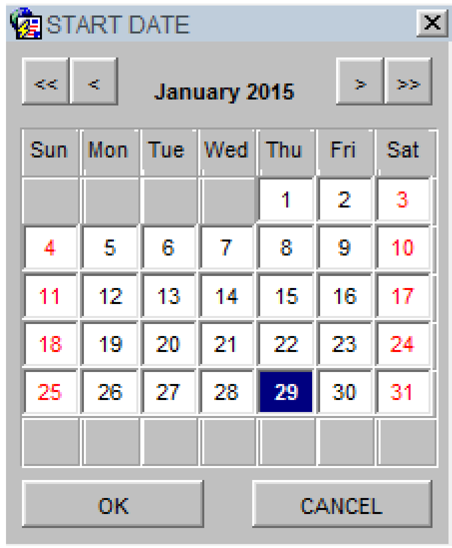


Figure 2-2 Calendar Feature

2. Use << and >> to select a `{year}`.
3. Use < and > to select a `{month}`.
4. Click the `{desired date}`, and then click **OK**.

   The Calendar closes, and the `{date selected}` *appears in the* ***Date*** *field.*

2.4.2 Required Fields

AUXDATA contains many required fields, which represent the minimum amount of data necessary to enter a record in AUXDATA and which may not be left blank. AUXDATA will not allow users to continue if a required field is left blank. Instead, an error will be received and the user must enter the required data in the field to continue.

2.4.3 Queries and Searches

Anytime a user is prompted by AUXDATA to enter search criteria, the following options are available, depending on the information the user has and the results the user would like to retrieve:

- If the user knows exactly what item is being searched for, enter as much information as possible about that item.

  The unique item matching the search criteria appears.

- If the user knows only a small piece of information (perhaps only a portion of a word) to enter as search criteria, enter that information in the appropriate field and use the percent symbol (%) as a wild card. For example, when searching for a particular crewmember who has a "ch" in the last name, enter: **%ch%**

A list of every entry matching the search criteria appears. For example, if **%ch%** *is entered, every last name including "ch" appears.*

- If the user knows the last letter or letters of the item being searched for, enter this information preceded by a percent symbol (%). For example, when searching for a particular crewmember whose last name ends with "ch," enter: **%ch**

  A list of every entry matching the search criteria appears. For example, if **%ch** *is entered, every last name ending with "ch" appears.*

- If the user knows the first letter or letters of the item being searched for, enter this information followed by a percent symbol (%). For example, when searching for a particular crewmember whose last name starts with "ch," enter: **ch%**

  A list of every entry matching the search criteria appears. For example, if **ch%** *is entered, every last name beginning with "ch" appears.*

- If the user does not know any information to enter as search criteria, leave all the search criteria fields blank, and then click the **Find** button at the bottom of the screen.

  An entire listing of entries for the unit appears. If another query dialog box appears before the list appears, AUXDATA is giving another chance to refine the search, because the list will be large. Use the above options in the second box as well to refine the search or to retrieve the entire list. To display the entire list, ensure the percent symbol (%) is in the text box, and then click ***OK****.*

2.4.4 Toolbar Options

A **Toolbar** menu, which offers query and navigation tools, is available throughout the AUXDATA application (see Figure 2-3).

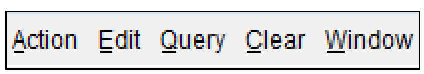


Figure 2-3 Toolbar Menu

The **Action** option offers the following commands:

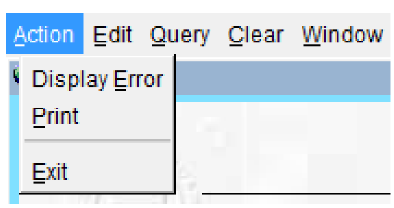


Figure 2-4 Action Menu

The **Edit** option offers the following commands:

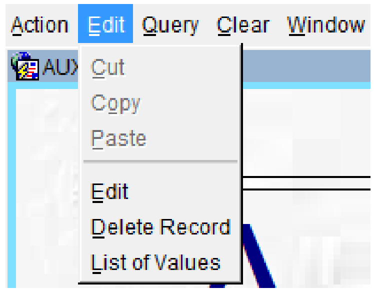


Figure 2-5 Edit Menu

The **Query** option offers the following commands:

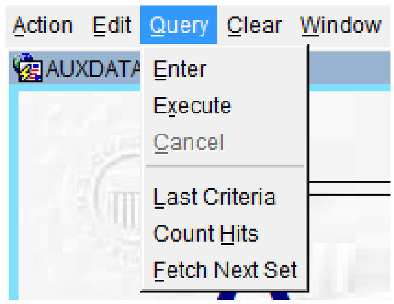


Figure 2-6 Query Menu

The **Clear** option offers the following commands:

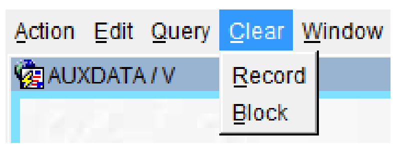


Figure 2-7 Clear Menu

The **Window** option offers the following commands:

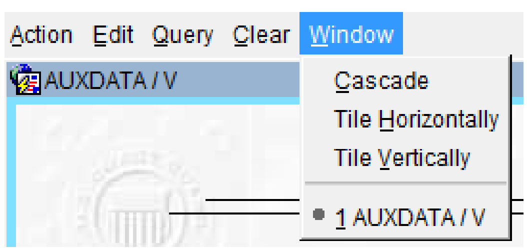


Figure 2-8 Window Menu

To execute a query for a data field, perform the following steps:

1. Click the **Query** menu.

   *The **Query** command list appears.*

2. Click **Enter**.

   All data fields become blank.

3. Enter search parameters using the guidelines in *Section 2.4.3, Queries and Searches* for any data fields for which a user may wish to execute a query.

4. Click the **Query** menu.

    *The **Query** command list appears.*

5. Click **Execute**.

    All records matching the search parameters entered in Step 3 appear.

2.4.5 List of Values

When the cursor is placed in certain data fields, a **List of Values** button appears at the bottom of the window. This list may be accessed by pressing **CTRL-L** or by clicking **List of Values**.

*The **List of Values** dialog box appears, similar to the following:*

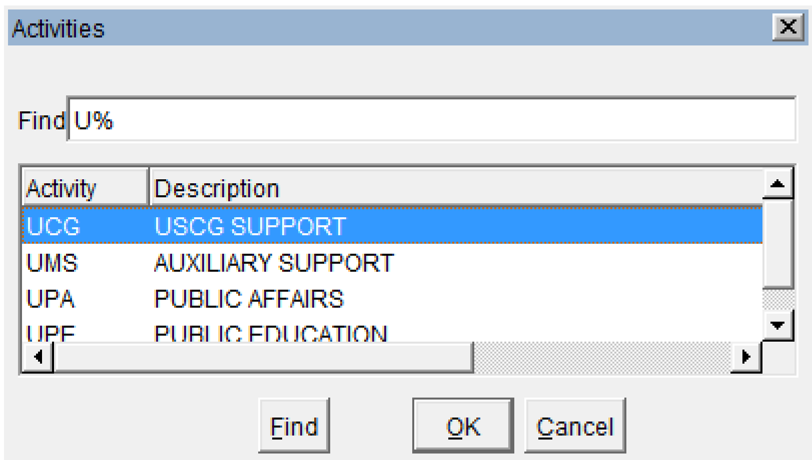


Figure 2-9 List of Values Dialog Box

The search may be refined further by entering text in the **Find** field using the guidelines in *Section 2.4.3, Queries and Searches*, and then clicking **Find**. After a successful search, select the chosen items, and click **OK**.

The {selected items} *are placed into the data field.*

2.4.6 List Boxes

A list box is similar to a text box in AUXMIS, but has an arrow on the right end of the box. Click the arrow on the right end of the list box to view a list of defined options. Data cannot be entered in lists; only selections from the available option list may be made. Figure 2-10 shows an example of a list box:

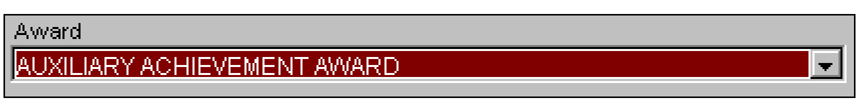


Figure 2-10 List Box

To use a list box, perform the following steps:

1. To view the options, click the arrow  on the right end of the box.

    The list of options appears on the screen, similar to the following:

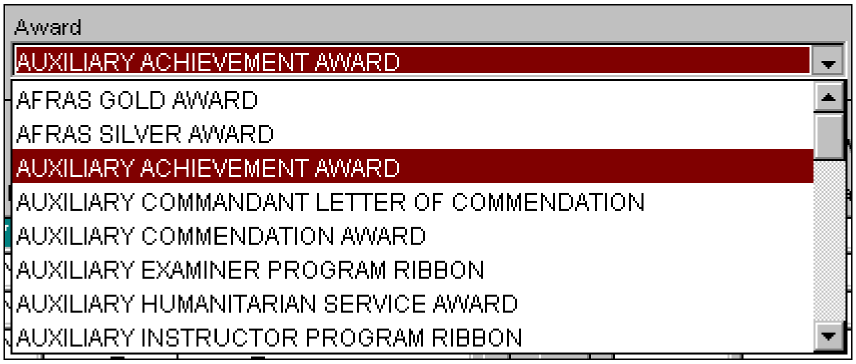


Figure 2-11 Option List

2. Move the mouse to highlight the appropriate data, and then click the highlighted data.

    The list closes, and the `{data selected}` *appears in the list box.*

2.4.7 Filters

A filtering feature is available throughout AUXDATA (refer to Figure 2-12 for an example), which allows the user to quickly find a record(s) in a list.

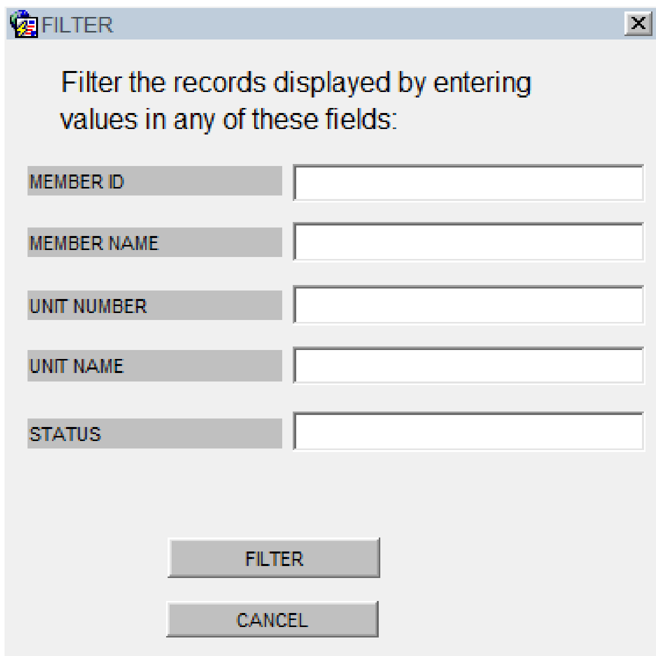


Figure 2-12 Filter

To filter a list, perform the following steps:

1. Click **Filter**.
2. In the dialog box that appears, enter a *{value}* in any one or all of the fields provided to filter the list.
3. Click **Filter**.

*The list is populated only with the records that have the specified value, and then the **Filter** button becomes an **Unfilter** button.*

2.4.8 Column Heading Buttons

Sorting using the column heading buttons is available throughout the AUXDATA application (refer to Figure 2-13). These buttons list items alphabetically, numerically, or alphanumerically.

Figure 2-13 Column Heading Buttons

For example, to alphabetize by member name, click the **Member Name** button.

*The **Member Name** column lists the members in alphabetical order.*

3. CONNECTING TO AUXDATA

This section discusses the necessary usernames, passwords, associated access levels, and procedures to log on to AUXDATA.

3.1 Access Levels

NOTE: *This user guide covers actions and procedures for all access levels. Not all users have permissions to perform all the procedures in this guide. Each user should discern which procedures apply to each role, or class, in AUXDATA.*

All authorized AUXDATA users have the ability to view all of the aircraft, boat, radio, and unit data in AUXDATA through the **Reports** menu. The ability to create, read, update, delete, and approve data in the system is based on the user's role, or class.

All users have unique identification numbers. User ID numbers are directly related to the user's assigned unit. Therefore, when logging on to AUXDATA, a user will only see the resources assigned to that unit and may only update activity logs for resources assigned to that unit.

The following is a brief description of each of the three access levels:

- **Flotilla Level**

  Flotilla-level users have access in AUXDATA to create and update log activities.

NOTE: *No action can be performed on approved logs.*

- **DIRAUX Level**

  DIRAUX may log on as Air, Boat, Radio, or Unit users. DIRAUX has access in AUXDATA to approve data at the command level by using **Approvals** and to create, update, and delete data in their unit's Activity Log.

- **Headquarters (HQ) Level**

  Headquarters-level users have access in AUXDATA to approve data at the HQ level.

3.2 Logging On to AUXDATA

AUXDATA is accessed through the Web browser on a Personal Computer (PC) or a USCG SWIII. To access AUXDATA, perform the following steps:

1. Log on to a PC or a USCG SWIII.
2. Open the MS IE browser by double-clicking the icon on the desktop.

   The MS IE browser opens.

3. In the browser's address bar, enter https://auxdata.uscg.gov and then press **ENTER**.

   The AUXDATA Home page for Production appears, similar to the following:

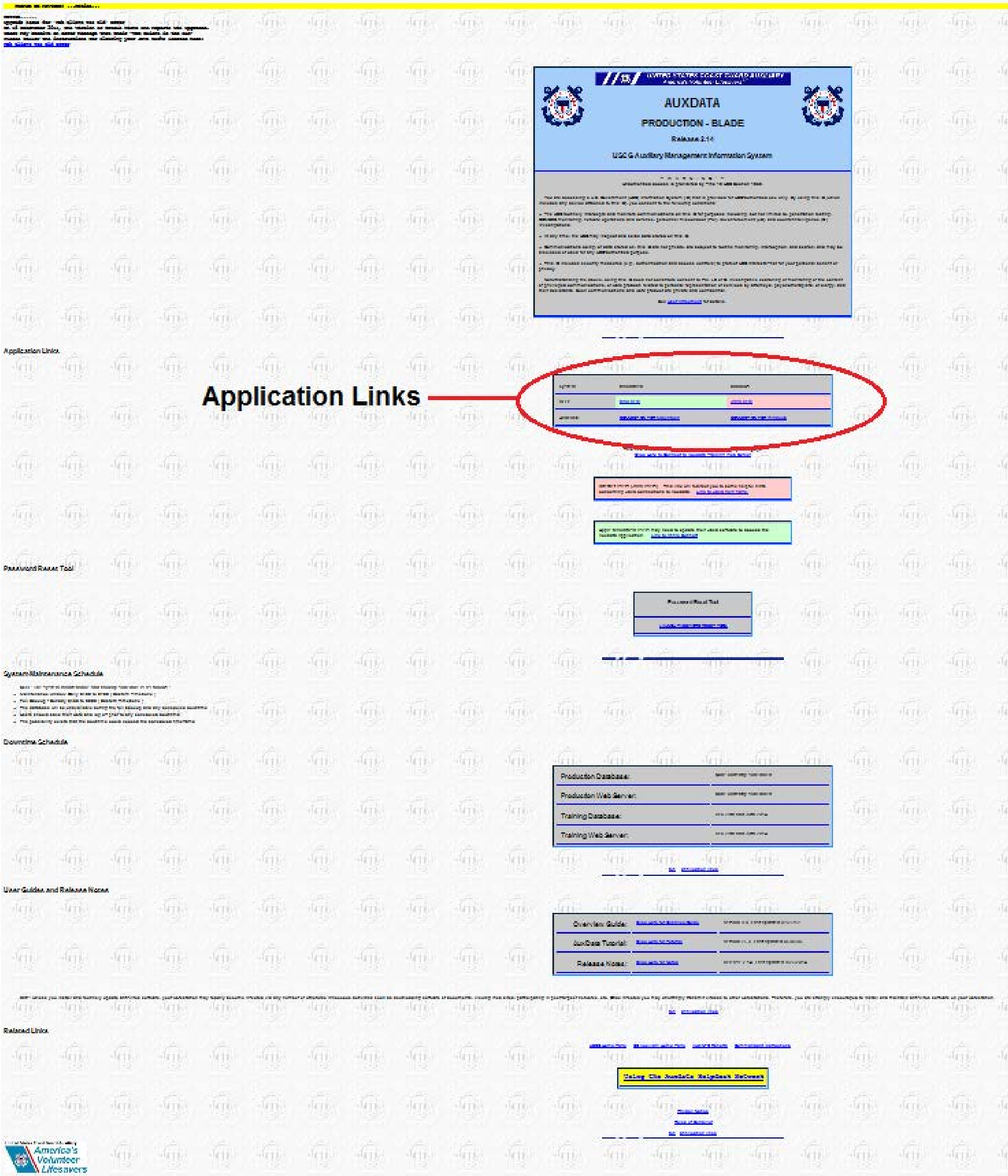


Figure 3-1 AUXDATA Home Page

WARNING:	**Only connect to Production for official business reasons; Production <u>may not</u> be used for training or practicing on the system. To train or practice on the system, connect to Training at https://auxdata2.uscg.gov.**

4. Scroll down the page and click the Application Link appropriate to the computer being used to connect to the database.

   The Logon screen appears, similar to the following:

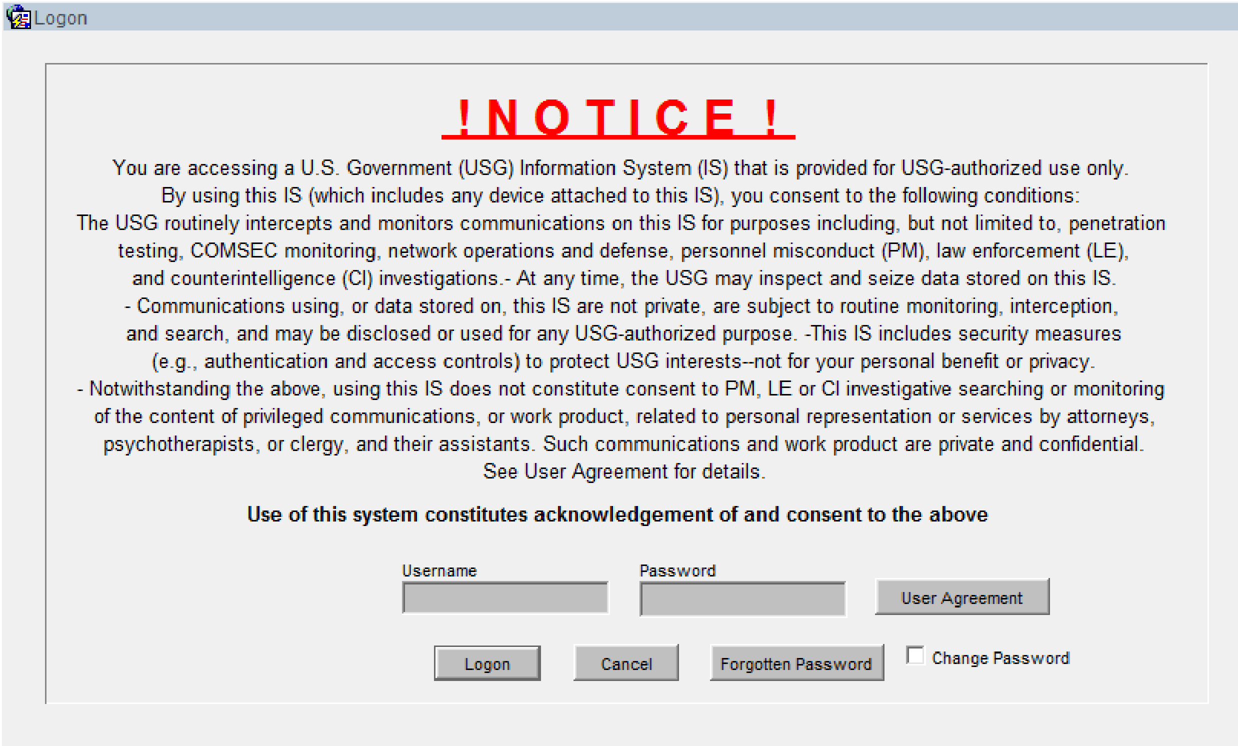


Figure 3-2 Logon Screen

5. Enter the `{username}` and `{password}` in their respective fields, and then click **Logon**.

NOTE 1: *Accounts lock after three failed logon attempts. The user should contact the DSO-IS or SO-IS to have his/her account unlocked or wait 1 hour for the account to automatically unlock.*

NOTE 2: *User passwords must be changed every 45 days.*

NOTE 3: *After 45 days of inactivity, the user account locks. After 90 days of inactivity, the user account drops (expires).*

NOTE 4: *If a user's account is locked or expired, the user is notified at logon with an alert message. If this occurs, the user should contact the DSO-IS or SO-1S for assistance.*

6. A first-time user should log on using the appropriate default username and password (as explained in the note below). The system then prompts the user to change his/her password. For instructions on changing passwords, see *Section 3.3, Changing a User Password*.

NOTE: *The username of a first-time user will be his/her first initial followed by his/her last name. For example, John Smith's username would be **jsmith**. The temporary password for a first-time user will be randomly generated and provided to the creator of the account.*

The user is connected to AUXDATA, and the AUXDATA main menu appears, similar to Figure 2-1.

Once logged on to the AUXDATA database through a browser, a user may perform Auxiliary duties. Continue to the next sections for guidance with various AUXDATA tasks.

3.3 Changing a User Password

To change a user password, perform the following steps:

1. On the Logon screen (see Figure 3-2), enter the `{user name}` and `{password}` in their respective fields, select the **Change Password** check box, and then click **Logon**.

   The Change Password screen appears, similar to the following:

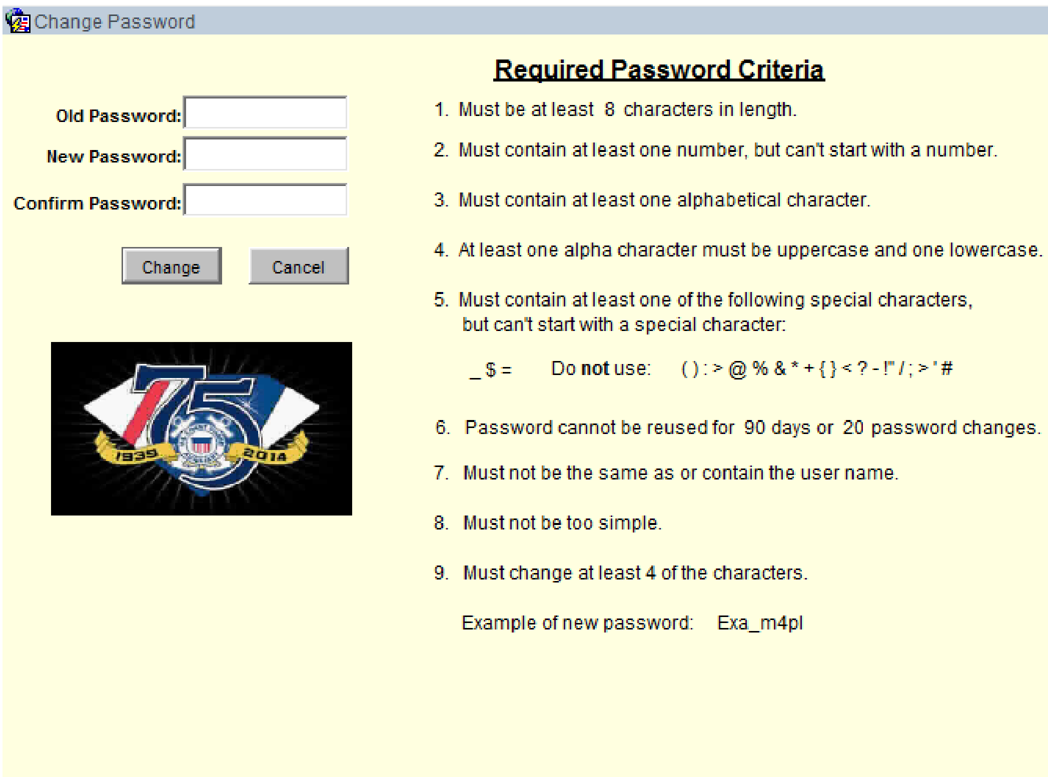


Figure 3-3 Change Password Screen

NOTE: *To be valid, the new password must conform to the Required Password Criteria listed on the Change Password screen.*

2. Enter the `{old password}` in the **Old Password** field, the `{new password}` in the **New Password** field, the `{new password}` again in the **Confirm Password** field, and then click **Change**.

   A message box appears indicating the password was successfully changed.

3. Click **OK**.

   The password is changed. The user is logged on, and the AUXDATA main menu appears, similar to Figure 2-1.

3.3.1 Forgot Password

If the logon password is forgotten, perform the following steps to have a new password sent to the user's e-mail address.

NOTE: *To use this tool, the user must have a valid e-mail address in AUXDATA.*

1. On the logon screen, click **Forgotten Password**.

    The Password Reset Tool screen appears, similar to the following.

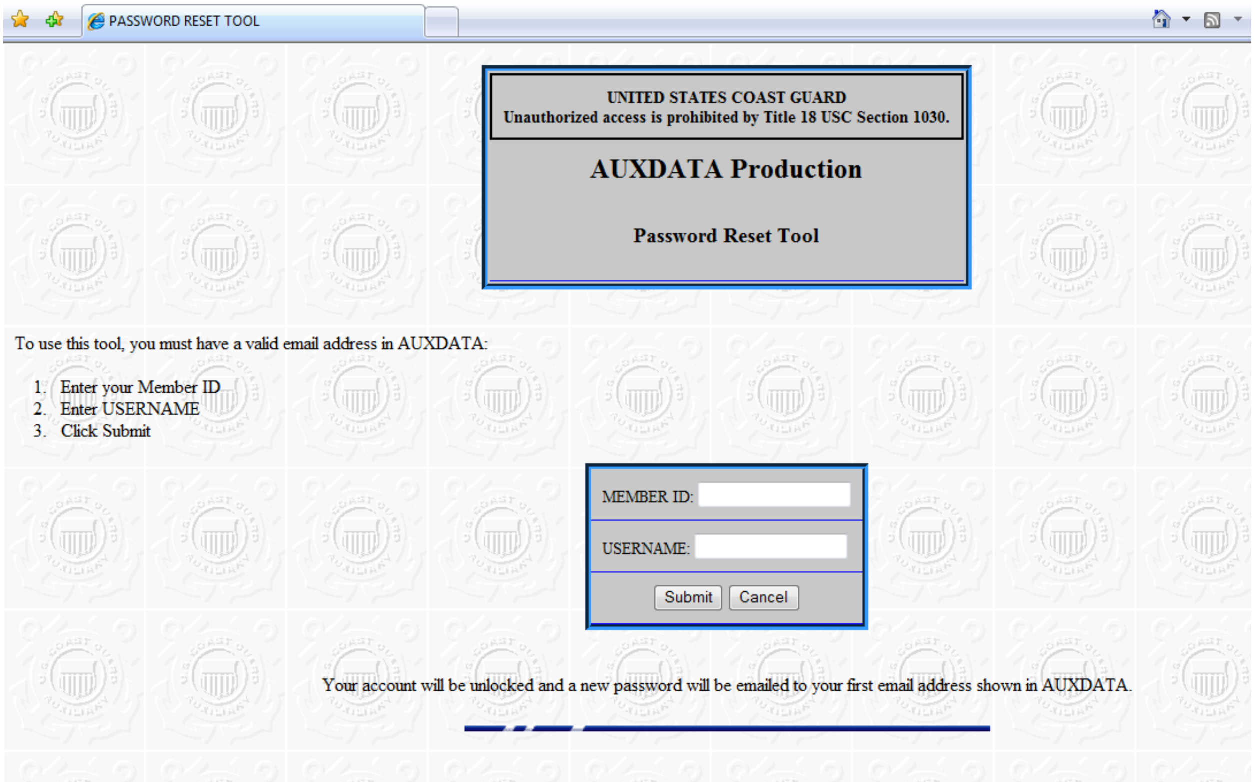


Figure 3-4 Password Reset Tool Screen

2. Enter the `{member ID}` and the `{username}` in their respective fields.
3. Click **Submit**.

    A new password is sent to the user's e-mail address listed in AUXDATA.

4. Access `{user e-mail}` to obtain the new password, and then enter the `{new password}` at the Logon screen, as shown in Figure 3-2.

    At new logon, the user is prompted to change the password, as shown in Figure 3-3.

4. ACTIVITY LOGS

The **Activity Logs** portion of AUXDATA is the most important and most widely used portion of the system. In the **Activity Logs**, users must keep a continuous log of activities for a specific aircraft, boat, radio, or unit by entering activities each time the mission status changes. AUXDATA computes and produces all numbers and reports when it is time to run a report, which obviates the need for the user to calculate the numbers. AUXDATA allows users to enter activities at any time (immediately after the activity, incrementally, or all at once). The **Activity Logs** provide the following options:

- Aircraft
- Boat
- Radio
- Unit.

To use the **Activity Logs**, perform the steps in this section and subsections.

NOTE: *For the purpose of this user guide, the procedures and examples provided are based on the Boat option. Aircraft, Boats, Radios, and Units have similar actions, but details, such as list items and resources, vary with each.*

4.1 Create Activity

To create an activity for a resource (aircraft, boat, radio, or unit), perform the following steps:

1. Click **Activity Logs** on the AUXDATA main menu.

   The Resources screen appears, similar to the following:

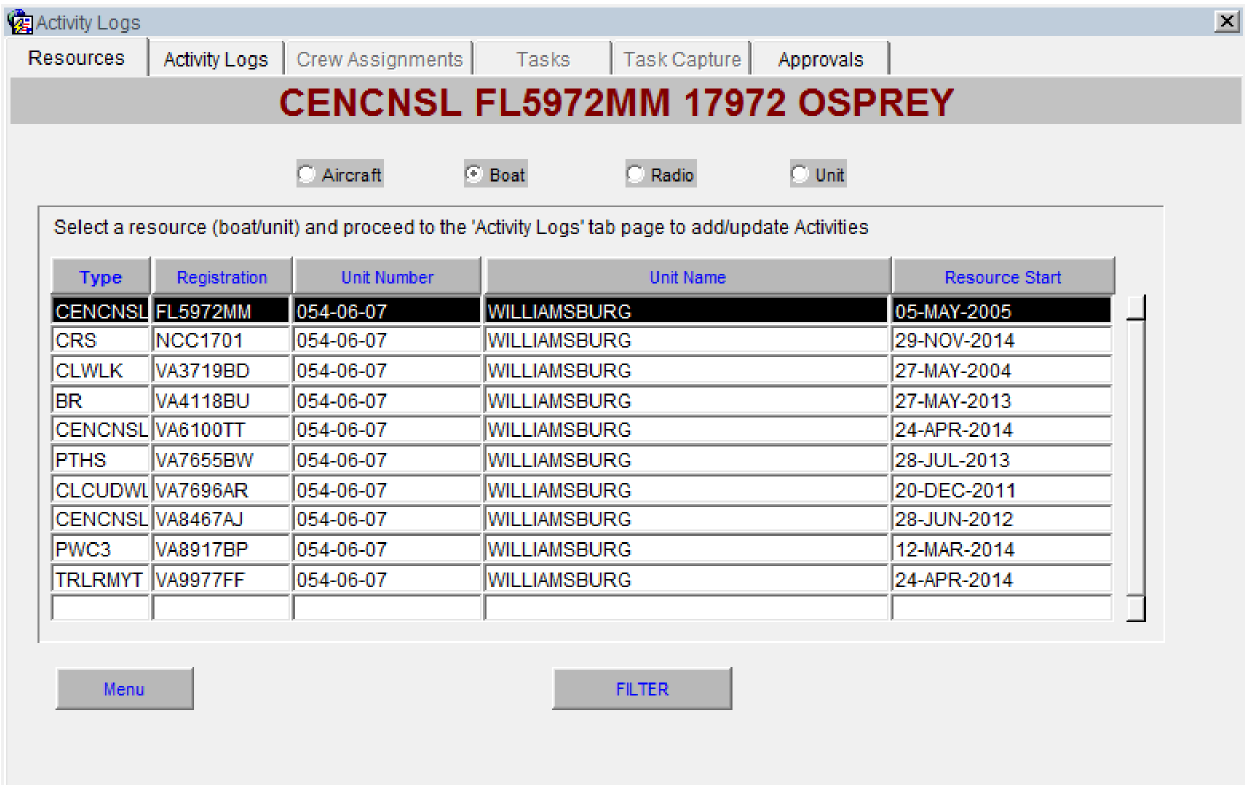


Figure 4-1 Boat Resource Screen

2. Click the `{desired resource}`, click the `{desired unit}`, and then click the **Activity Logs** tab.

   The Activity Logs screen appears, similar to the following:

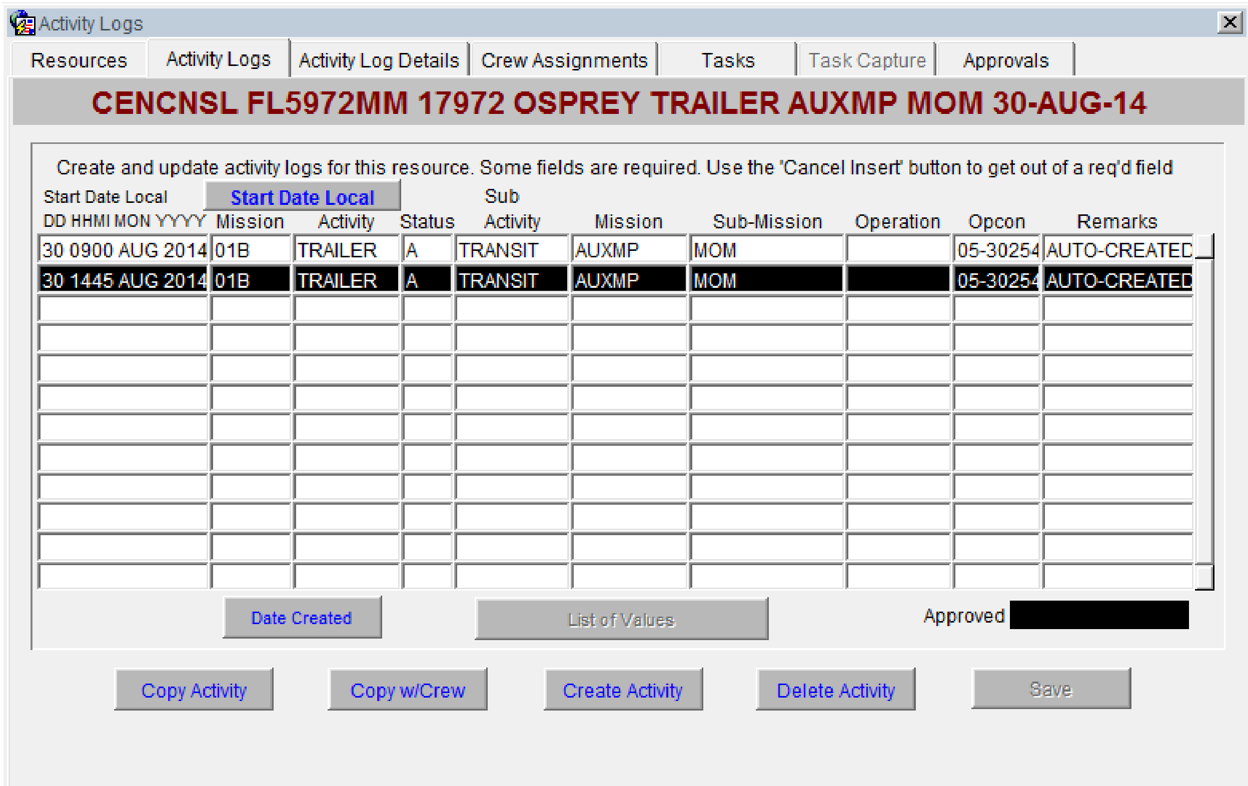


Figure 4-2 Activity Logs Screen

3. Click **Create Activity**.

   The cursor moves to the next available activity line, and the screen shows a new ***Cancel Insert*** *button.*

4. Enter the *{necessary information}* for the activity. Press the **TAB** key after each field. Use the **List of Values** when necessary.

   The {information} *is entered.*

5. Click **Save**.

   The {activity information} *is saved.*

NOTE: *After clicking* ***Save*** *in Step 5, users may be presented with the following screen giving the option to automatically generate an End of Mission (EOM) record for the activity. Follow the instructions on the screen as appropriate:*

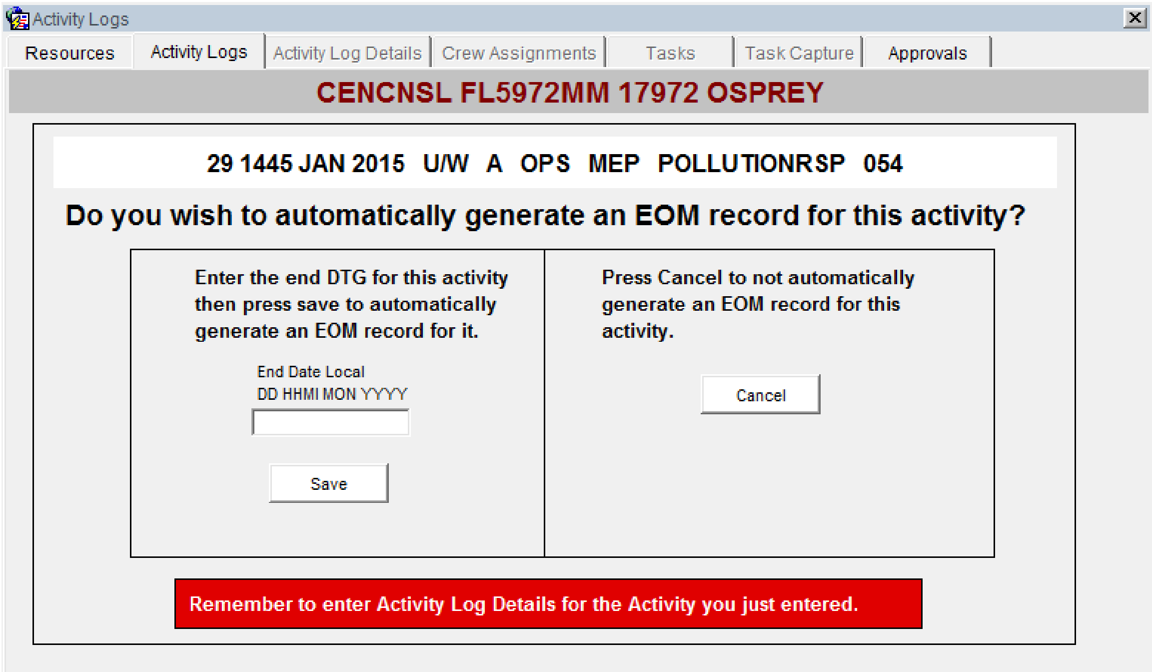


Figure 4-3 Option to Generate EOM Record Automatically

4.2 Copy Activity

To copy an activity for a resource (aircraft, boat, radio, or unit), perform the following steps:

1. Click the activity log with the **Mission** desired, and then click **Copy Activity**.

   The activity is copied to the next available blank activity log. All {information} *except the **Start Date Local** field is copied.*

2. Enter the *{Start Date Local}* in the **Start Date Local** field, press the **TAB** key, and then click **Save**.

   The {activity} *is entered and saved.*

NOTE: *After clicking **Save**, users may be presented with a screen giving the option to automatically generate an EOM record for the activity, similar to Figure 4-3. Follow the instructions on the screen as appropriate.*

4.3 Copy Activity With Crew

To copy an activity with the crewmembers for a resource (aircraft, boat, radio, or unit), perform the following steps:

1. Click the activity with the **Mission** desired, and then click **Copy w/Crew**.

   The activity is copied to the next available blank activity log. All {information} *except the **Start Date Local** field is copied.*

2. Enter the *{Start Date Local}* in the **Start Date Local** field, press the **TAB** key, and then click **Save**.

   The {information} *is entered and saved.*

*NOTE: After clicking **Save**, users may be presented with a screen giving the option to automatically generate an EOM record for the activity, similar to Figure 4-3. Follow the instructions on the screen as appropriate.*

4.4 Cancel Insert

To cancel the insertion of an activity for a resource (aircraft, boat, radio, or unit), perform the following step:

1. Click **Cancel Insert**.

   The activity is cancelled.

4.5 Delete Activity

To delete an activity, perform the following steps:

1. Select the activity log to delete, and then click **Delete Activity**.

   A confirmation screen appears similar to the following:

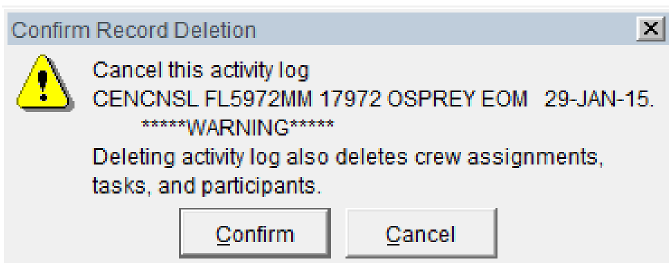


Figure 4-4 Confirm Record Deletion Screen

2. Click **Confirm**.

   The activity log is deleted.

4.6 Entering Activity Log Details for Resources

To enter the activity log details for the `{selected resource}` (aircraft, boat, or radio), perform the following steps:

1. Click the first activity log entered (for example: Mission=ATON), and then click the **Activity Log Details** tab.

   The Activity Log Details screen appears, similar to the following:

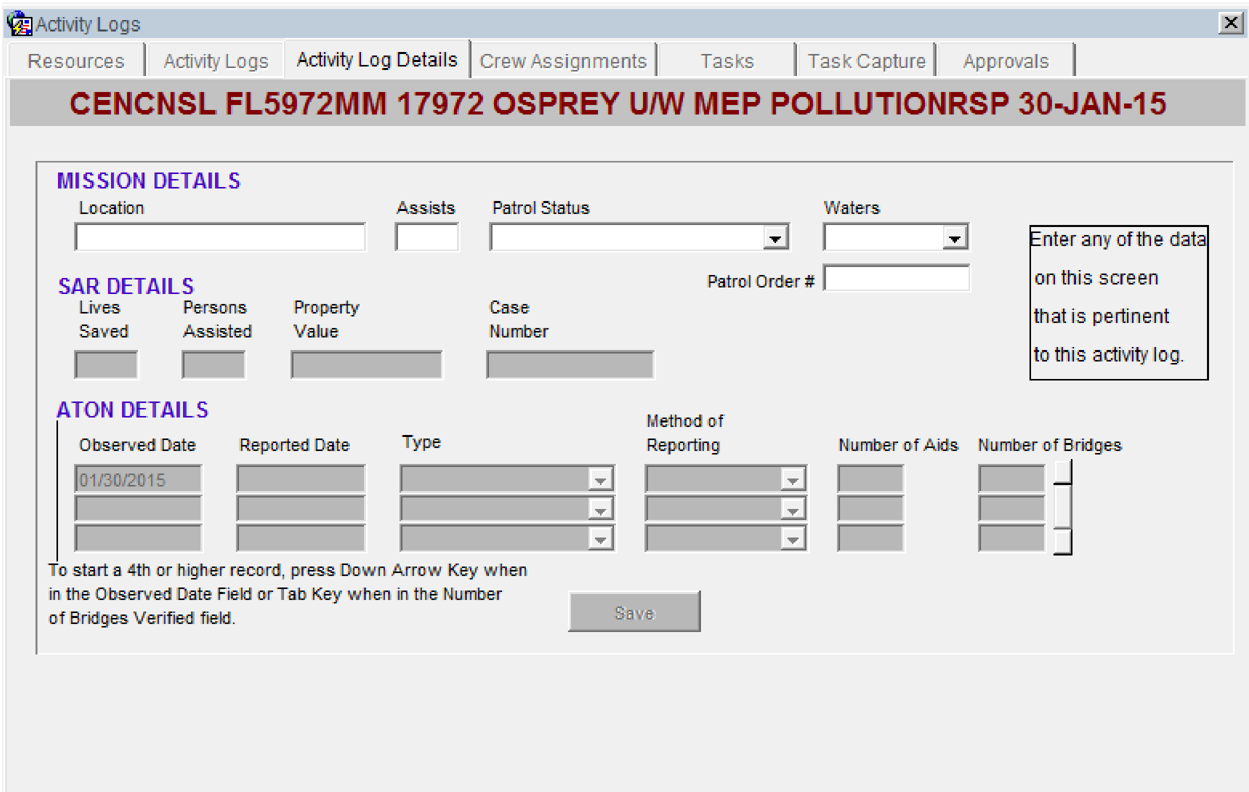


Figure 4-5 Activity Log Details Screen for a Resource

2. Enter the *{information}* required for Mission, SAR, or ATON details, whichever applies to the present mission.

   The {information} *is entered.*

3. Click **Save**.

   The {information} *is saved.*

4.7 Entering Activity Log Details for Unit

To enter the activity log details for a unit, perform the following steps:

1. Click the first activity log entered (for example, Mission=VSC), and then click the **Activity Log Details** tab.

   The Activity Log Details screen appears, similar to the following:

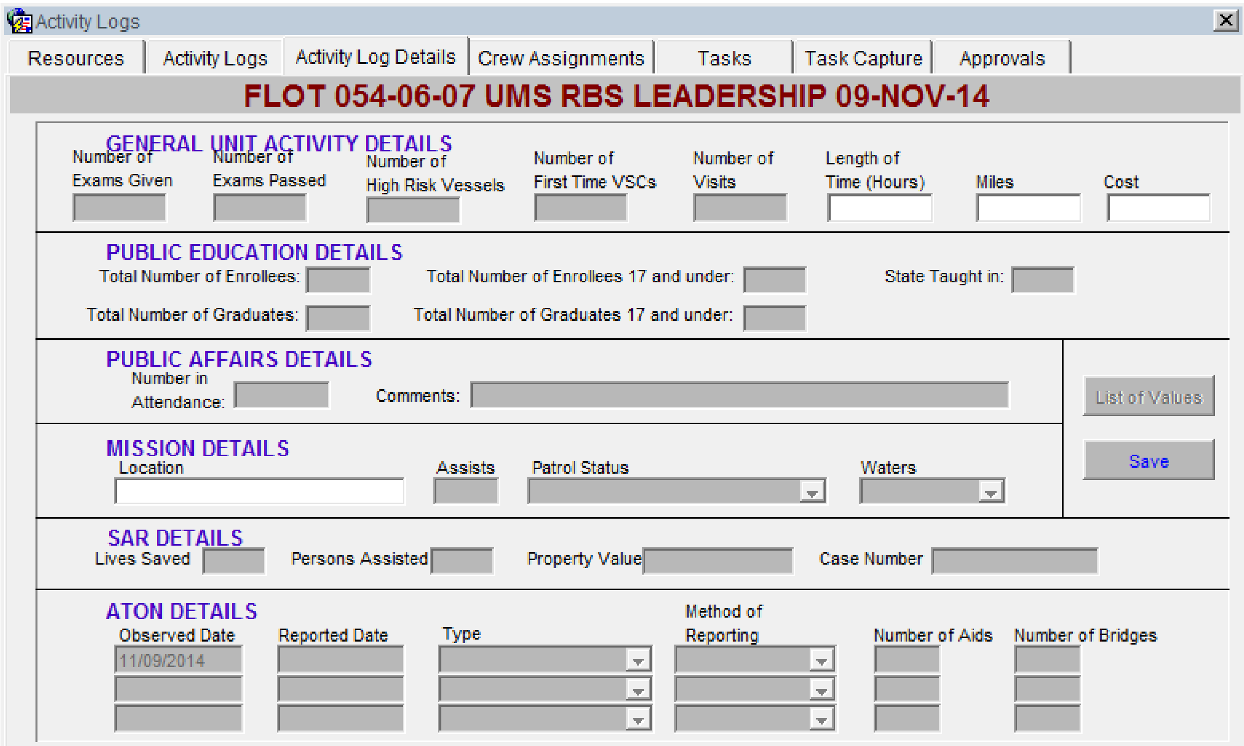


Figure 4-6 Activity Log Details Screen for a Unit

NOTE: *The Activity Log Details screen may vary somewhat, depending on the mission. For example, some data entry fields shown in Figure 4-6 may be disabled or absent for certain activities.*

2. Enter the *{information}* required that applies to the present mission. Use the **List of Values** when necessary.

   The {information} *is entered.*

3. Click **Save**.

   The {information} *is saved.*

NOTE: *If the **Save** button is not active after the* {information} *has been entered in the last field, press the **TAB** key to activate it.*

4.8 Entering Crew Assignments

The **Crew Assignments** tab allows users to search on the following: **Your Unit and its Subordinate Unit**, **Select Flotilla**, and **Search for Person**. To enter the crew assignments for a resource (aircraft, boat, radio, or unit), perform the following steps:

1. Click the **Crew Assignments** tab.

   The Crew Assignments screen appears, similar to the following:

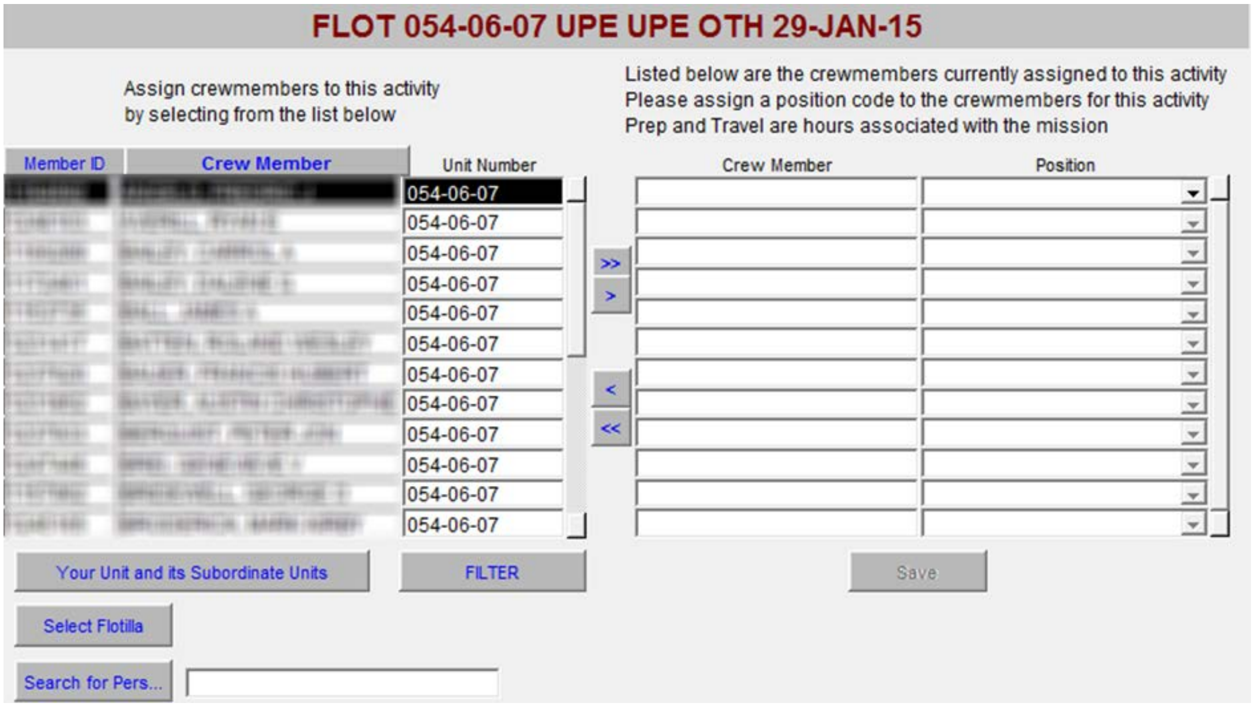
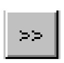


Figure 4-7 Crew Assignments Screen

NOTE: *Clicking the **Select Flotilla** button yields a **List of Values**. The **Search for Person** feature may also be used by entering the* {search information} *in the search field and clicking **Search for Person**.*

2. Click  to assign all of the crewmembers. If not all crewmembers participated, select the crewmembers who are being assigned, and then click . If needed, use the **Filter** feature to refine the list of crewmembers displayed.

   The {crewmember(s)} *selected are moved from the left side of the screen to the right side of the screen.*

3. For each member listed on the right side, there is a position. Use the list box to select each member position.

4. Click **Save**.

   The {information} *is saved.*

4.9 Tasks

To enter the tasks for a resource (aircraft, boat, radio, or unit), perform the following steps:

1. Click the **Tasks** tab.

   The Tasks screen appears, similar to the following:

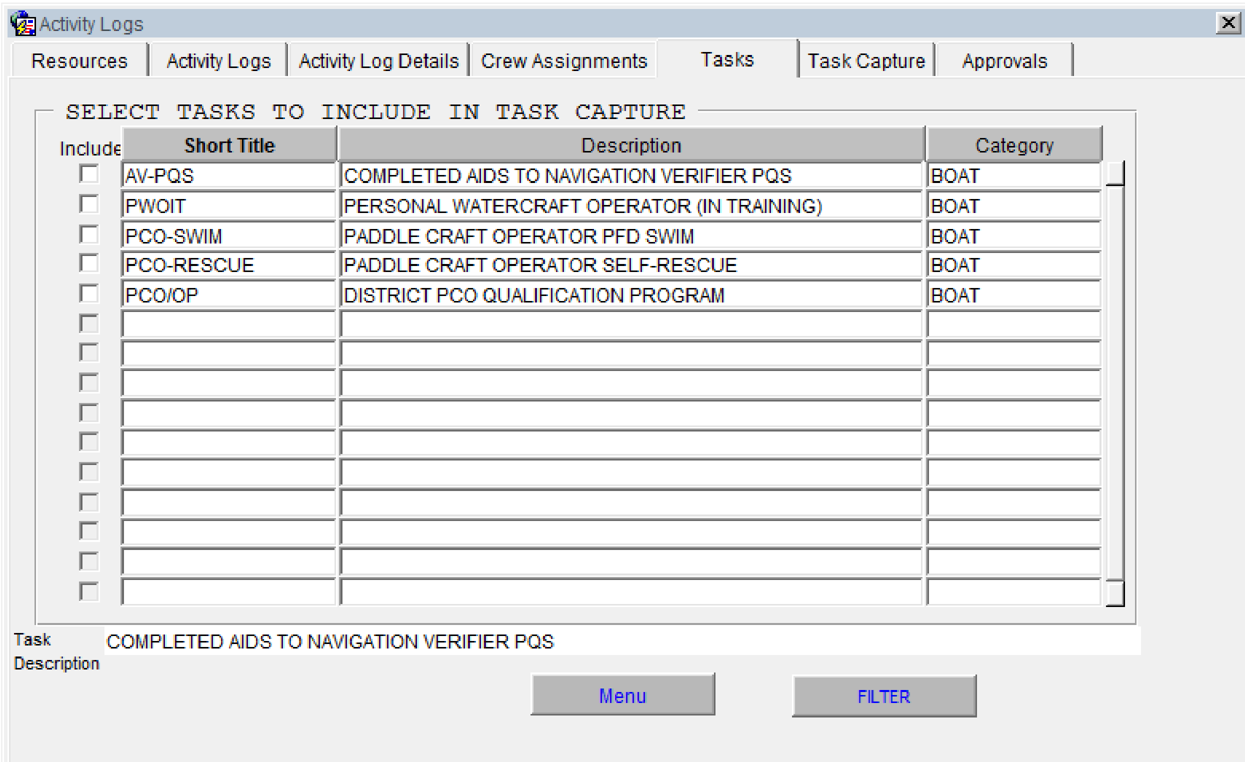


Figure 4-8 Tasks Screen

2. Click the **Include** check boxes for the tasks desired.

4.10 Task Capture

The **Task Capture** tab allows users to delete, copy, and save tasks in which a resource is participating. To capture the tasks for a resource (aircraft, boat, radio, or unit), perform the following steps:

1. Click the **Task Capture** tab.

   The Task Capture screen appears, similar to the following:

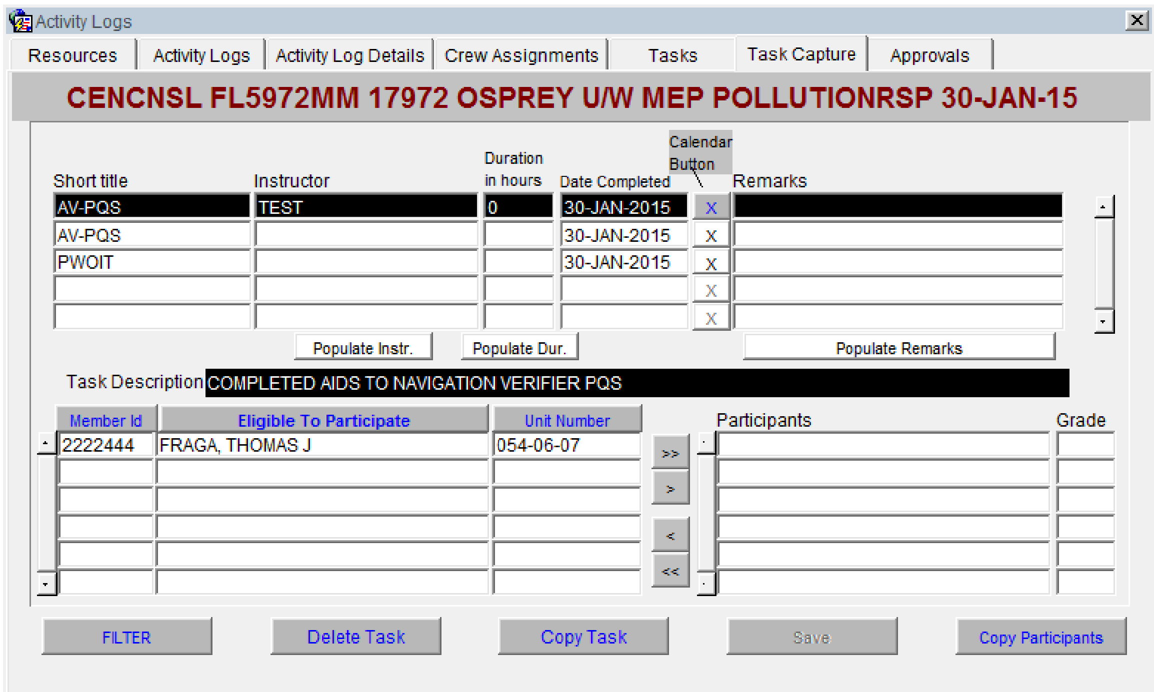


Figure 4-9 Task Capture Screen

2. Enter the `{information}`. For example: `{Short title}`, `{Instructor}`, `{Duration in hours}`, `{Date Completed}`, and `{Remarks}` for the task to be captured.

3. Click **Save**.

   The `{information}` *is saved.*

4.11 Entering Approvals

Up to 24 months of Approved Activities are available for viewing. To approve the activities for a resource (aircraft, boat, radio, or unit), perform the following steps:

1. Click the **Approvals** tab.

    The Approvals screen appears, similar to the following:

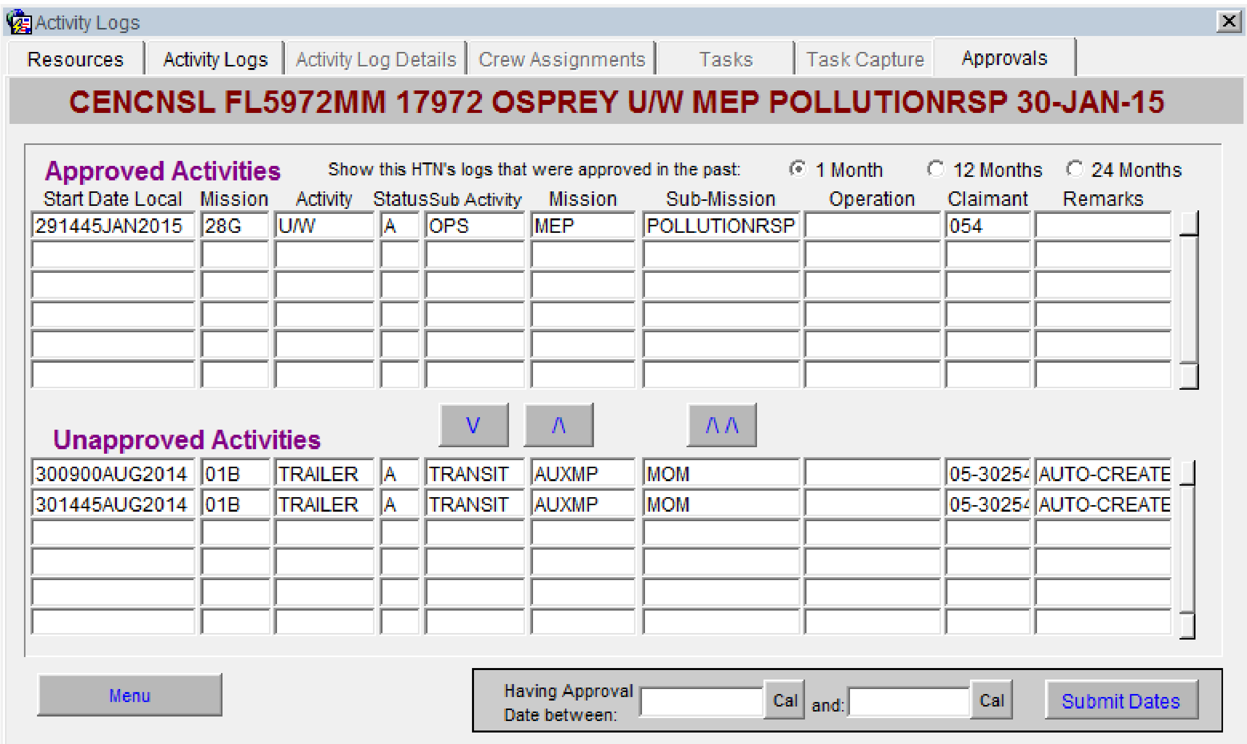
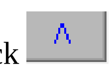


Figure 4-10 Approvals Screen

2. Select the `{desired activity}` in the **Unapproved Activities** section, and then click .

    The `{activity}` *is highlighted and moves to **Approved Activities**.*

3. Click Menu to return to the AUXDATA main menu, similar to Figure 2-1.

5. MEMBER STATUS

AUXDATA allows users to maintain information and the status of members of a unit and members of any subordinate units using **Member Status**. In **Member Status**, users can insert a new member, transfer a member, update member information, view member history, manage awards and skills, enter emergency contact information, and enter past offices.

5.1 Insert Member

To insert a new member at a unit or at any subordinate unit, perform the following steps:

1. Click **Member Status** on the AUXDATA main menu, similar to Figure 2-1.

   *The **Unit** tab appears, similar to Figure 6-1.*

***NOTE:** If a user is logged on as a SO-IS, the user is taken directly to the **Members** tab.*

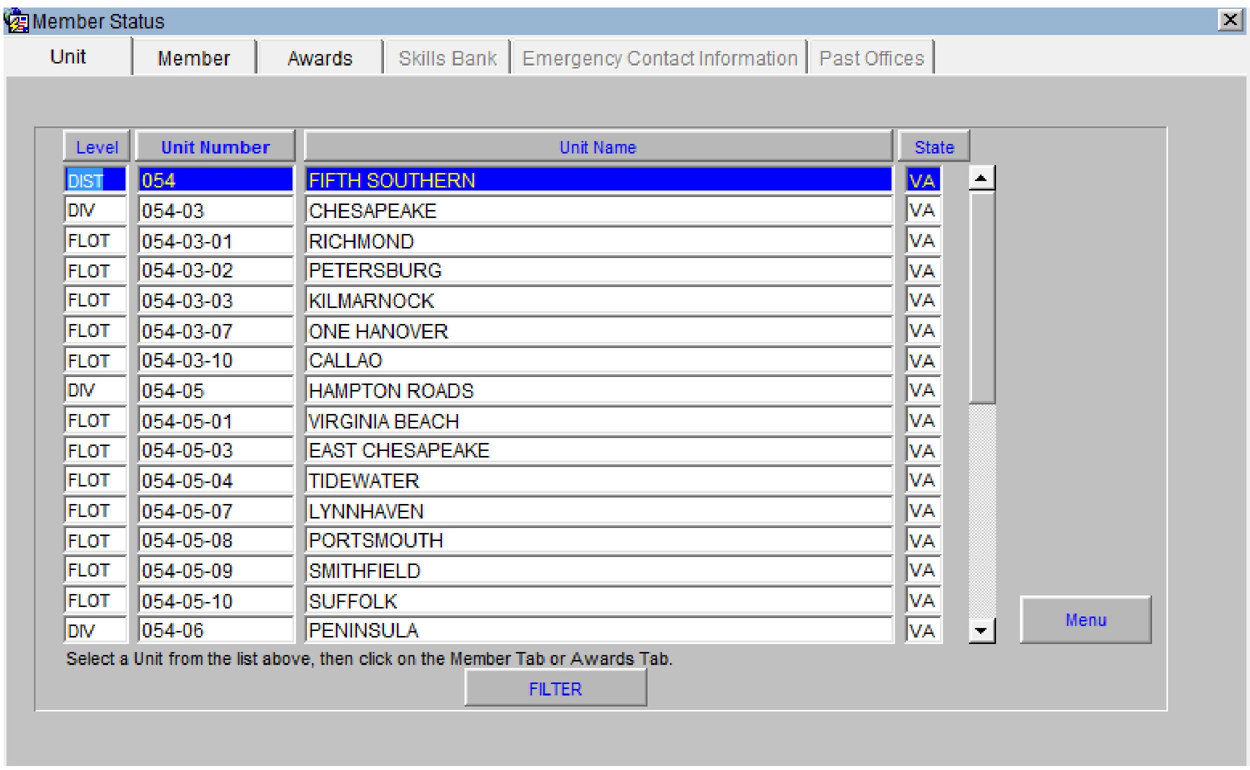


Figure 5-1 Unit Tab

2. Select the *{unit}* in which a member is being inserted.
3. Click the **Member** tab.

   *The **Member** tab appears, displaying all active members at the* {selected unit}*; if the user was directed to the **Member** tab upon entering **Member Status**, the members at that unit appear.*

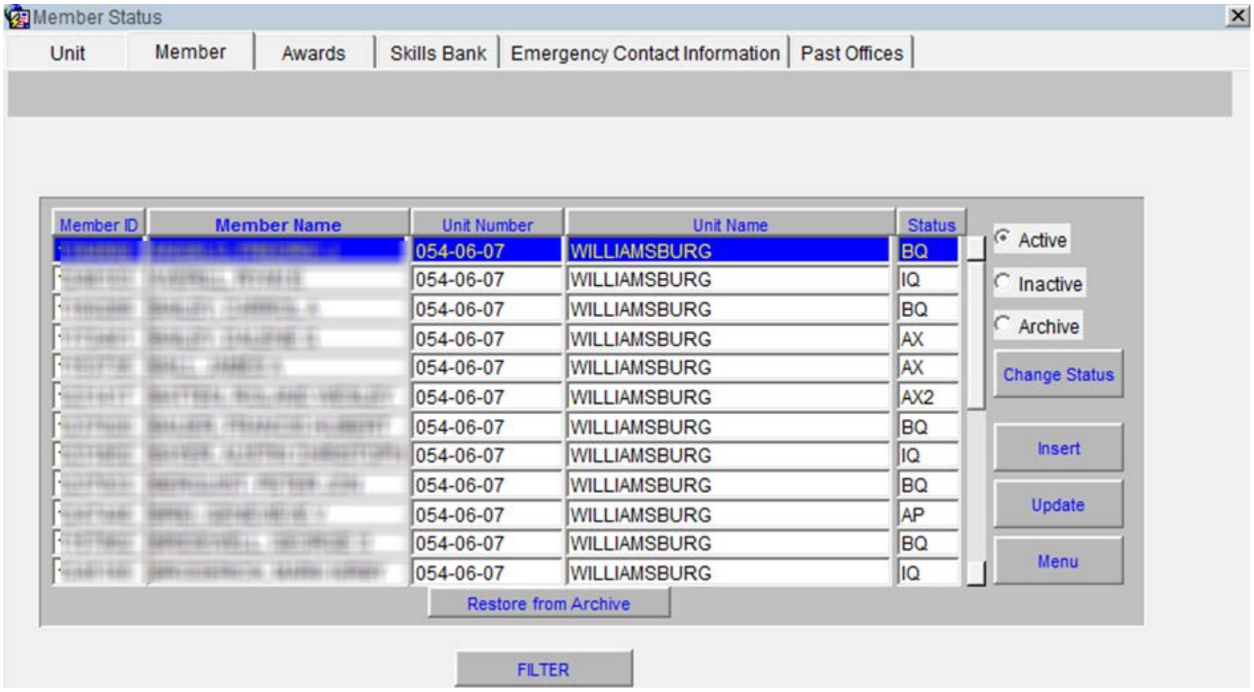


Figure 5-2 Member Tab

4. Click **Insert**.

The Insert screen appears, similar to the following:

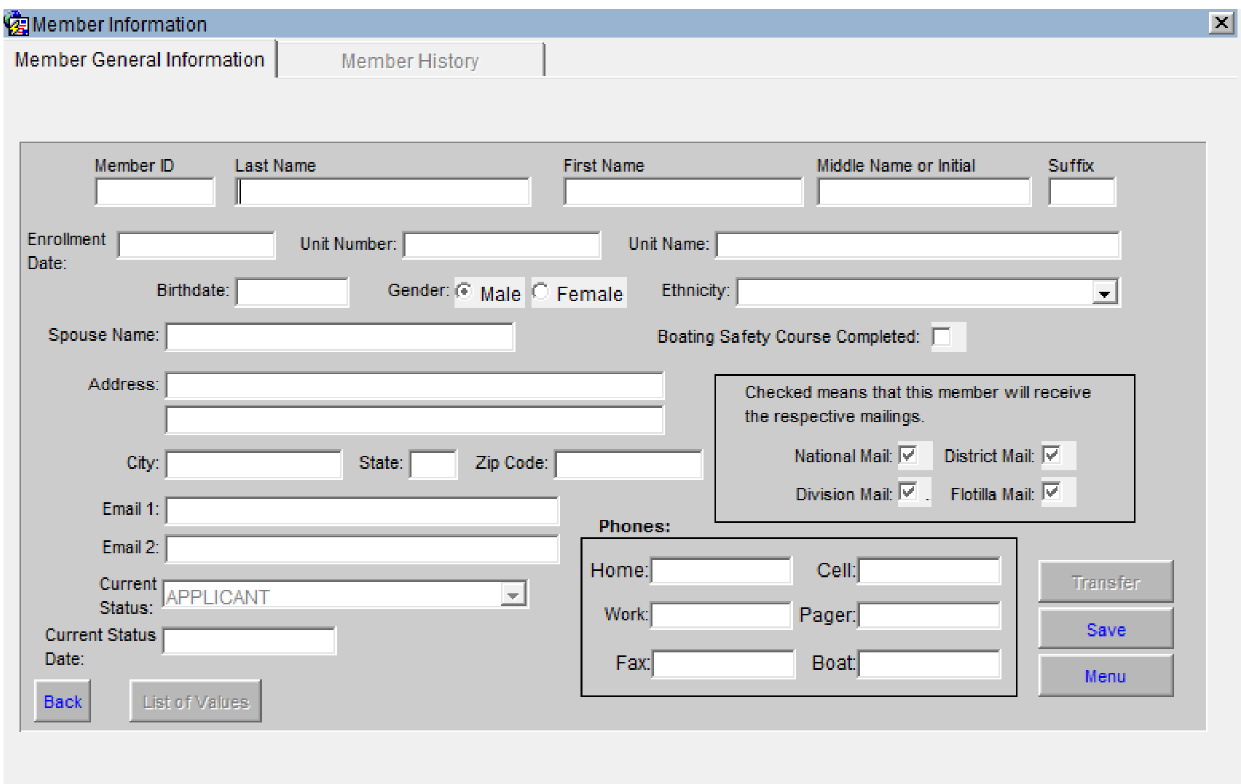


Figure 5-3 Member Insert Screen

5. Enter the `{necessary information}` for the member. Pressing the **TAB** key advances the cursor to the next field. (Use the **List of Values** and list box when necessary.)
6. Click **Save**.

   The record is saved.

NOTE: *Checking the **Boating Safety Course Completed** check box allows members that are Approval Pending (AP) status to be assigned and certified in all competencies except Coxswain, Aircraft Commander, First Pilot, Co-Pilot, Air Crew, Air Observer, and Personal Watercraft Operator. Only DISTRICT DIRAUX users are able to select or clear this check box. Once certified, AP members can serve as Lead, Non-Lead, or Trainee for their mission-related competencies.*

5.2 Change Member Status

This section describes how to change a member's status. Perform these same steps when archiving, or disenrolling, a member.

1. In the **Unit** tab, select the `{unit}` associated with the member whose status is to be changed. When entering **Member Status**, if the user is directed to the **Member** tab, go to Step 2.
2. In the **Member** tab, select the `{member}` whose status is being changed.
3. Click **Update**.

   *The **Member General Information** tab appears, similar to the following:*

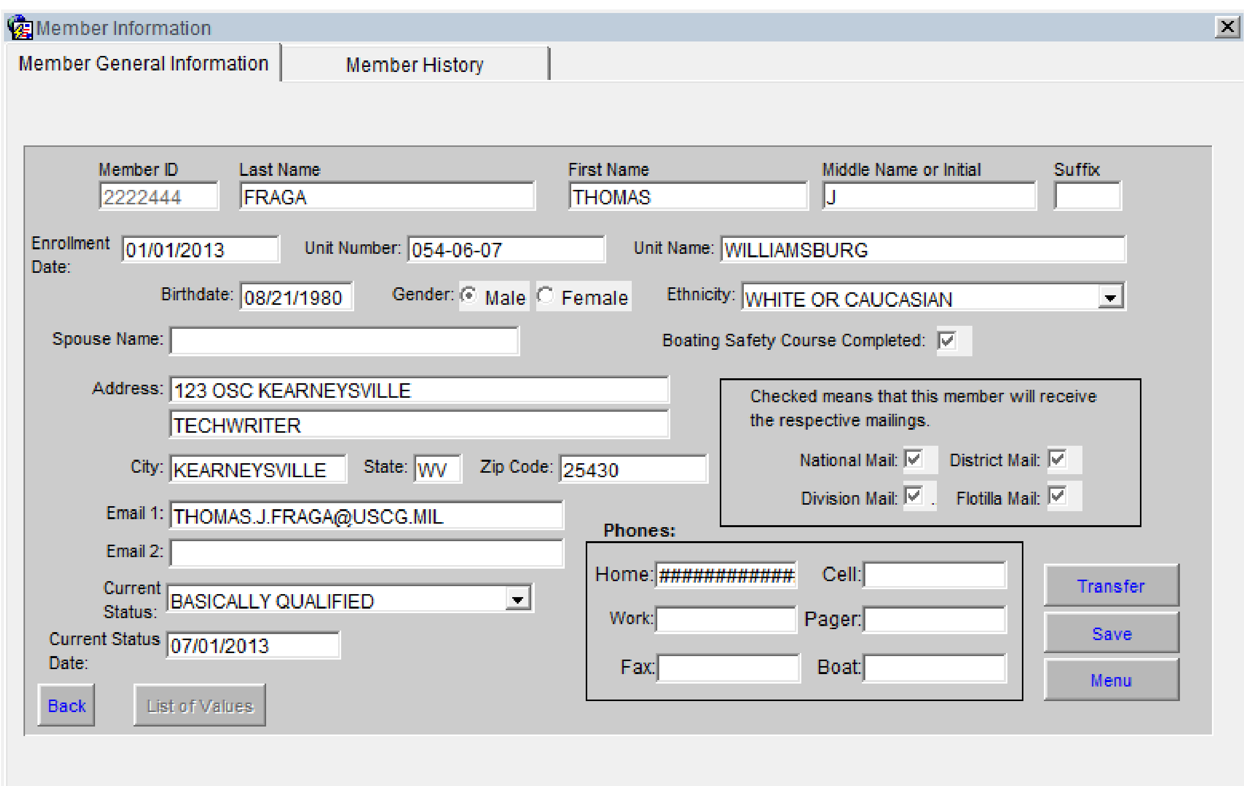


Figure 5-4 Member General Information Tab

4. Click the **Current Status** list box, and then select the *{desired status}*. In the **Current Status Date** box, enter the *{desired date}*, and then press the **TAB** key.

NOTE: *If a user wishes to archive a member, select the appropriate status option. It is important to know that only the Administrative and Member Requested Disenrollment options allow the member to be restored from the archive at a later date.*

The {information} *is entered.*

5. Click **Save**.

A confirmation message appears.

6. Click **OK**.

The Member Selection screen appears, and then the member status is changed.

5.3 Restore a Member From Archive

To restore a member from the archive, perform the following steps:

1. In the **Unit** tab, select the *{unit}* or *{subordinate unit}* desired.
2. Click the **Member** tab.

*The **Member** tab appears, displaying the members at the* {selected unit}.

3. Click **Restore From Archive**.

A list of members who can be restored appears.

4. Select the *{member}* being restored, and then click **Restore**.

The Member is restored from the archive.

5.4 Update Member

To update a member's information, perform the following steps:

1. In the **Unit** tab, select the *{unit}* or *{subordinate unit}* desired.
2. Click the **Member** tab.

*The **Member** tab appears, displaying the members at the* {selected unit}.

3. Select the *{member}* to be updated, and then click **Update**.

*The **Member General Information** tab appears, similar to* *[Figure 6-4](#)*.

4. Make the changes to the *{member's information}*.
5. Click **Save**.

The {information} *is saved.*

5.5 View Member History

AUXDATA provides historical information on members, such as the total active time in the Auxiliary since enrollment; if a member disenrolls for a period of time, it tracks the duration and provides a history of status changes for the selected member. A member's base enrollment date is also available in the Member Roster report. To view a member's historical data, perform the following steps:

1. In the **Unit** tab, select the `{unit}` where the member is located.
2. In the **Member** tab, select the `{member}` whose history is being viewed.
3. Click **Update**.

   *The **Member General Information** tab appears, similar to Figure 6-4.*

4. Click the **Member History** tab.

   *The **Member History** tab appears, similar to the following:*

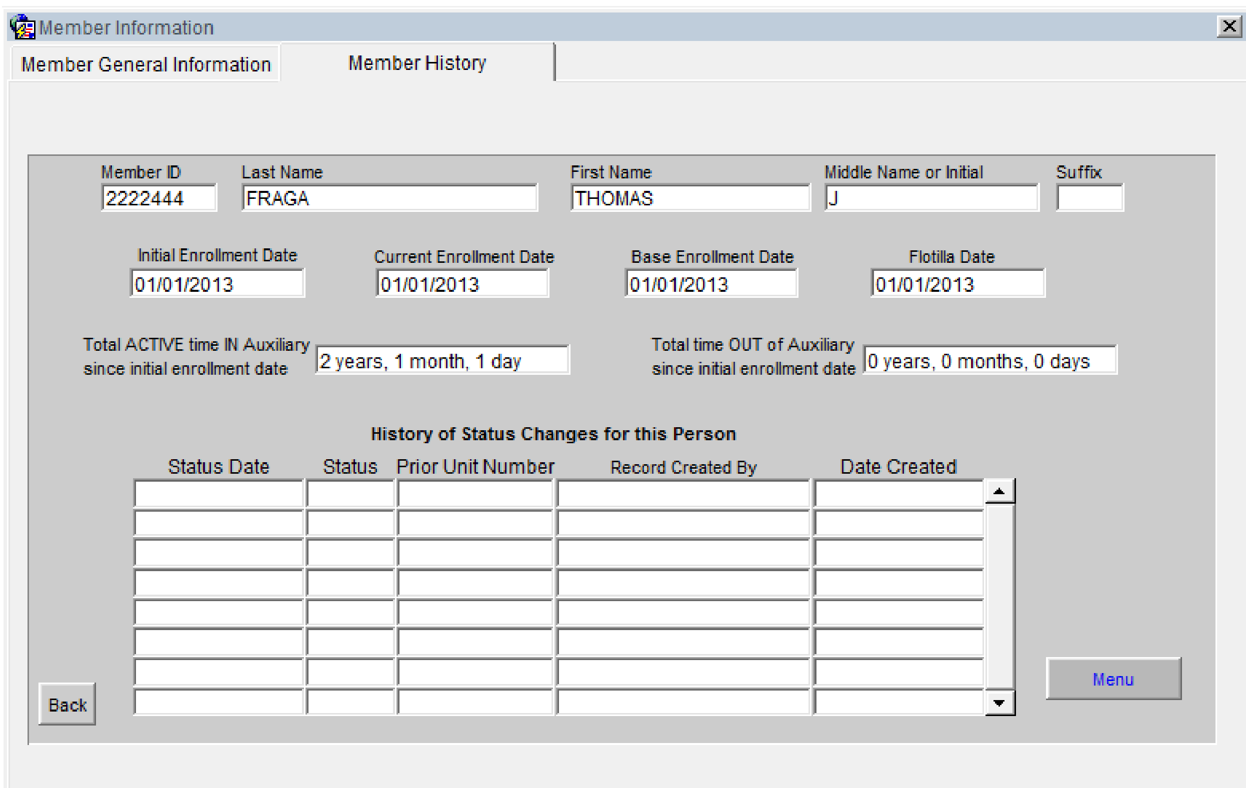


Figure 5-5 Member History Tab

NOTE 1: *This tab is read-only. Users cannot update the information that appears from this tab.*

NOTE 2: *To return to the **Member** tab, click **Back**. To return to the AUXDATA main menu, click **Menu**.*

5.6 Transfer a Member

To transfer a member to another unit, perform the following steps:

1. In the **Unit** tab, select the `{unit}` or `{subordinate unit}` desired.
2. In the **Member** tab, select the `{member}` being transferred, and then click **Update**.

   *The **Member General Information** tab appears, similar to Figure 6-4.*

3. Click **Transfer**.

The Member Transfer screen appears, similar to the following, displaying the member to be transferred:

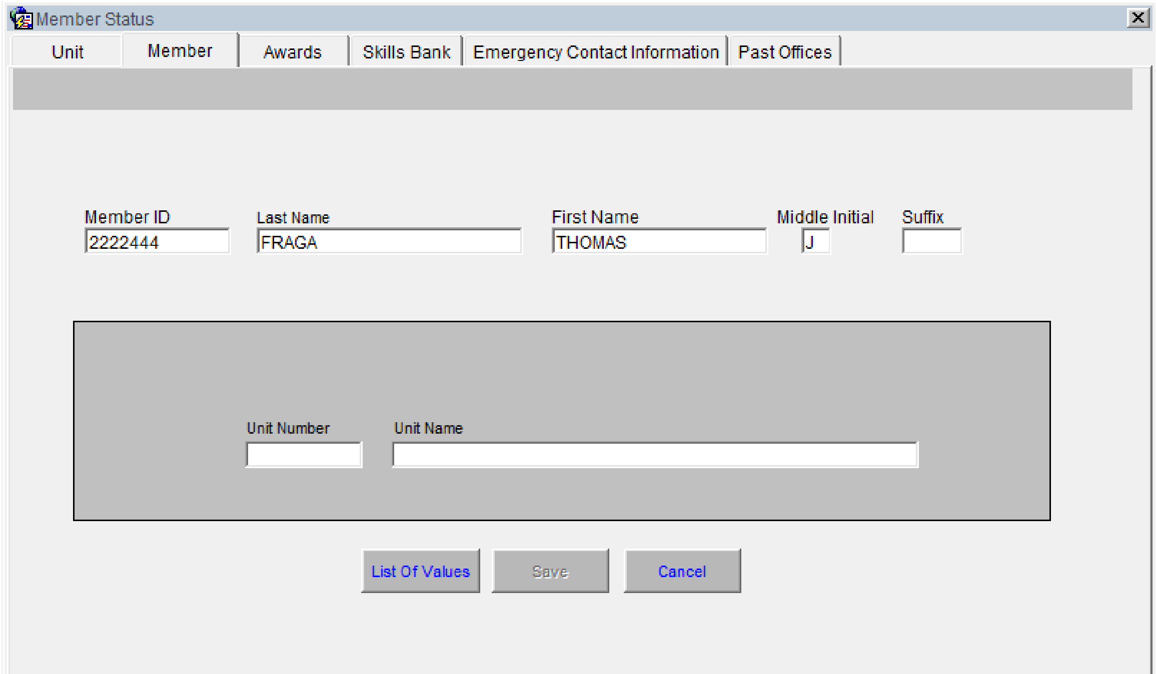


Figure 5-6 Member Transfer Screen

4. Click the **List of Values** button for the **Unit Name**. Scroll down, select the *{desired unit}*, click **OK**, and then press the **TAB** key.

   The {information} *is entered.*

5. Click **Save**.

   A confirmation message appears.

6. Click **OK**.

   The ***Member General Information*** *tab appears with the new unit listed for the member.*

NOTE: *When a member is transferred out of the flotilla, division, or district, AUXDATA automatically sets the office status to* ***Vacant Office*** *for all offices held by that member. However, if a member transfers within a division or district, AUXDATA does not automatically change the status of the member's offices.*

5.7 Awards

AUXDATA allows users to grant awards to members of a unit and the subordinate units by performing the following steps:

1. In the **Unit** tab, select the `{unit}` or `{subordinate unit}` desired, and then click the **Awards** tab.

   The Awards Information screen appears, similar to the following:

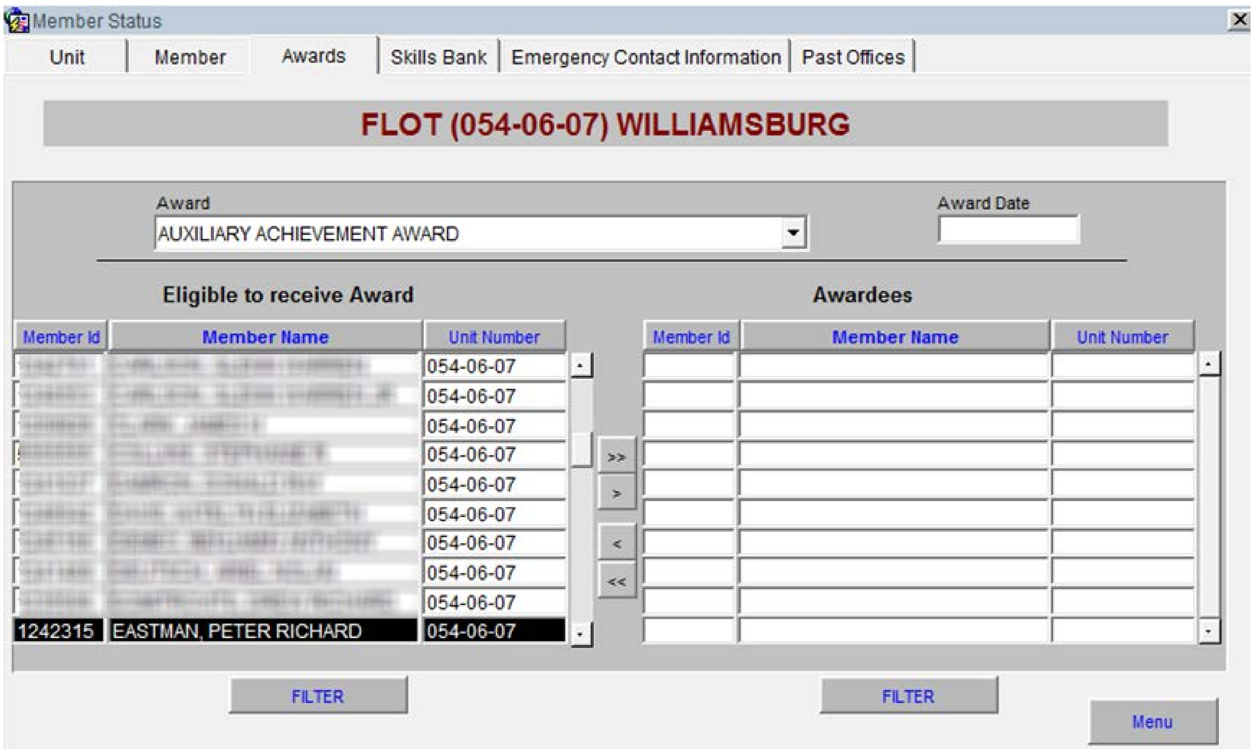
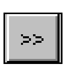
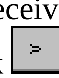


Figure 5-7 Awards Information Screen

2. From the **Award** list box, select the `{award}` being granted, press the **TAB** key, and then enter the `{date}` of the award in the **Award Date** field.

3. Click  to move all of the crewmembers to receive the award, or select the eligible crewmember to receive the award and then click .

   *The crewmembers or crewmember is moved from **Eligible to Receive Award** to **Awardees**.*

NOTE: *An Alert message appears if the Recreational Boating Safety (RBS) Device Award is given twice to one person, similar to the following:*

Figure 5-8 RBS Device Award Alert Message

5.8 Skills Bank

Use the **Skills Bank** tab to record the availability of Auxiliary members. To record a member's availability, perform the following steps:

1. In the **Unit** tab, select the *{unit}* where the member is located.
2. In the **Member** tab, select the *{member}* for whom availability is being recorded.
3. Click **Skills Bank**.

   *The **Skills Bank** tab appears, similar to the following:*

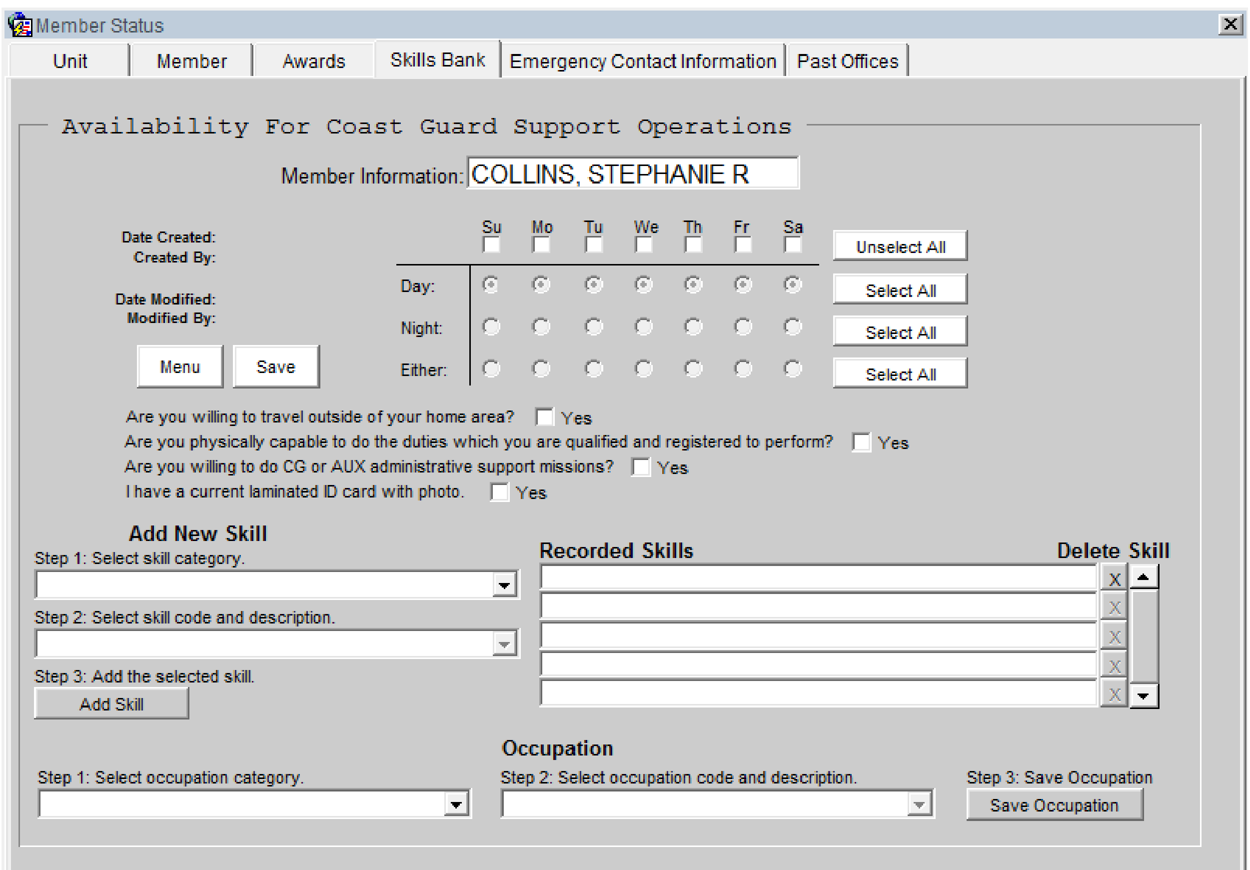


Figure 5-9 Skills Bank Tab

4. Use the check boxes to record which *{days}* of the week the member is available. For each *{day}* selected, use the option buttons to indicate the *{time of day}*.

5. Answer the questions. If the answer to any of the questions is No, then leave the question blank.

5.8.1 Add/Delete Skill

In the **Skills Bank** tab, **New Skills** may be added or **Recorded Skills** deleted. To add new skills, perform the following steps.

1. Use the first list box under **Add New Skill** to select the skill category.
2. Use the second list box under **Add New Skill** to select the skill code and description.
3. Click **Add Skill**.

The added skill appears similar to the following.

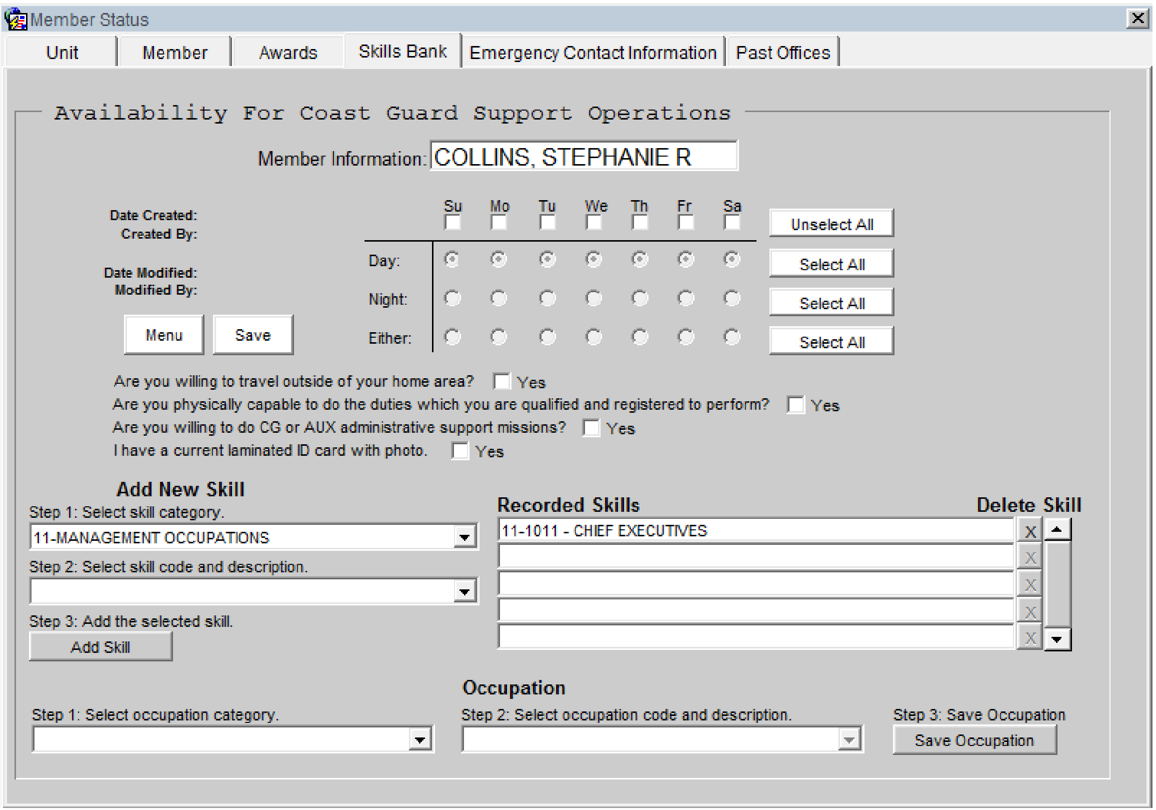


Figure 5-10 Recorded Skills Form

To delete a recorded skill, click the X under **Recorded Skills**.

A message appears similar to the following:

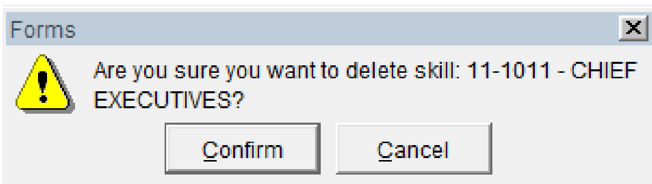


Figure 5-11 Skills Delete Confirmation

Click **Confirm** to complete the deletion or **Cancel** to cancel the action.

5.8.2 Occupation

In the **Skills Bank** tab, occupations may be recorded. To record a member's occupation, perform the following steps.

1. Select the member's occupation from the Step 1 list box at the bottom of the **Skills Bank** tab.
2. Select the member's occupation code and description from the Step 2 list box at the bottom of the **Skills Bank** tab.
3. Click **Save Occupation** to complete the recording of the occupation.

   A confirmation message appears.

4. Click **OK.**

   The {selected member's information} *is saved. District and national account users can then report on this* {information}.

5.9 Emergency Contact Information

Use the **Emergency Contact Information** tab to enter a member's *{emergency contact information}*.

1. In the **Unit** tab, select the *{unit}* where the member is located.
2. In the **Member** tab, select the member for whom *{emergency contact information}* is being entered.
3. Click the **Emergency Contact Information** tab.

   *The **Emergency Contact Information** tab appears, similar to the following:*

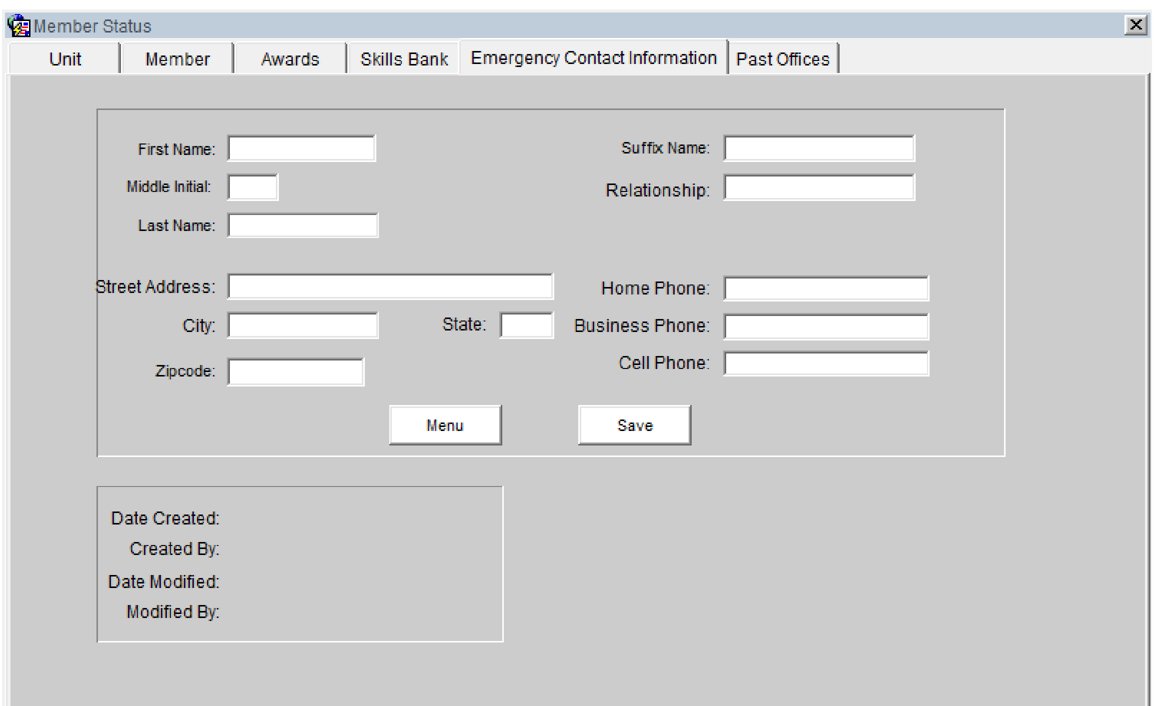


Figure 5-12 Emergency Contact Information Tab

4. Enter the `{emergency contact information}` for the member, and then click **Save**.

5.10 Update Member History

When a member's status changes, the new status should be updated using the procedures in *Section 6.2, Change Member Status*. However, a DIRAUX user may need to correct or complete a member's status history rather than update that member's current status. A convenient method of updating member history is to use a feature of the **Member History** tab available only to DIRAUX users granted MBR_HIST_UPD role privileges.

If the user has been granted the MBR_HIST_UPD role, perform the following steps to update member status history:

1. In the **Unit** tab, select the `{unit}` containing the member whose history is to be updated.
2. In the **Member** tab, select the `{desired member}`, and then click **Update**.

   *The **Member General Information** tab opens.*

3. Click the **Member History** tab.

   *The **Member History** tab appears, similar to the following:*

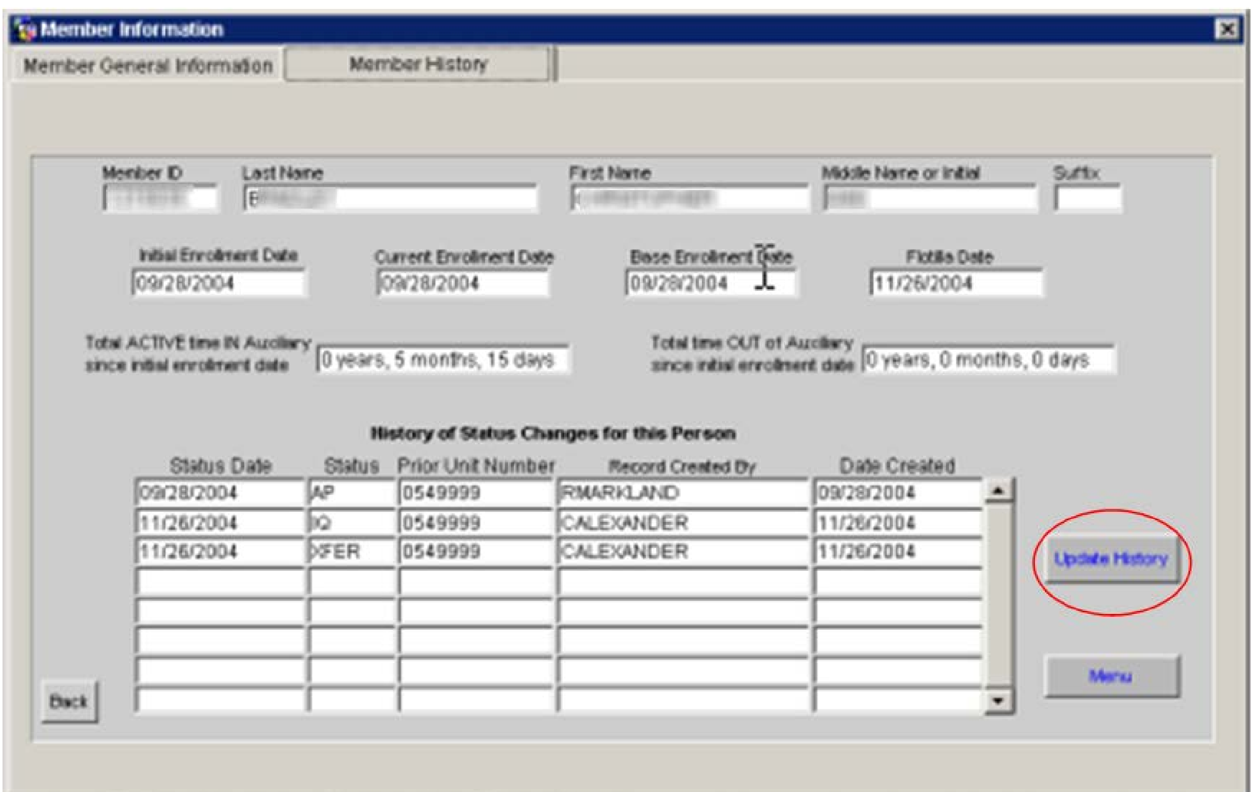


Figure 5-13 Member History Tab, With Update History Button

NOTE: *The **Update History** button appears only for DIRAUX users granted the MBR-HIST-UPD role. Otherwise, the button is not visible.*

4. Click **Update History**.

   The Member Status update screen appears, similar to the following:

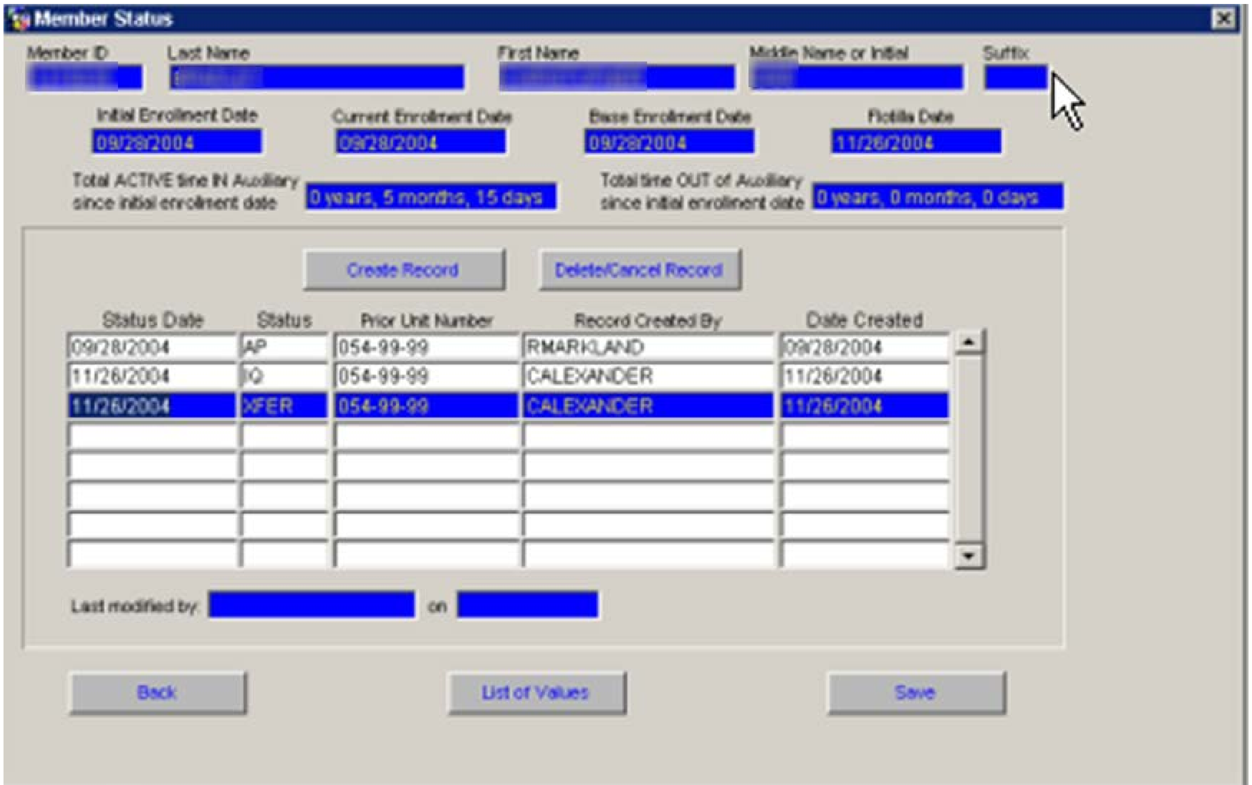


Figure 5-14 Member Status Update Screen

5. To insert a new status record, open a new record in one of the following ways:

   - Click the next (uppermost) blank or empty line, or click **Create Record**.

     The line is highlighted and ready for insertion of a status record.

6. Enter the *{status date}* (the date the status code became effective).
7. Enter the *{appropriate status code}* (or select it using the **List of Values** feature).
8. Enter the *{prior unit number}* (or select it using the **List of Values** feature), and then click **Save**.
9. To correct an existing status record, change the existing data (status date, status code, or prior unit number), and then click **Save**.

NOTE: *After **Save** is clicked, read-only data on the screen (such as total time in Auxiliary) refreshes or recalculates.*

10. To delete an existing status record or to cancel a record insert that has not been saved, select the *{record}*, click **Delete/Cancel Record**, and then click **Save**.

    The deleted or cancelled record disappears, and read-only data refreshes/recalculates.

5.11 Update Past Offices

AUXDATA provides the DIRAUX and Administration users with the ability to insert past offices in a member's record, and to change past office dates. It also shows the current offices held.

1. In the **Unit** tab, select the `{unit}` or `{subordinate unit}` desired.
2. In the **Member** tab, select the `{member}` to be updated.
3. Click the **Past Offices** tab.

*The **Past Offices** tab appears, similar to the following:*

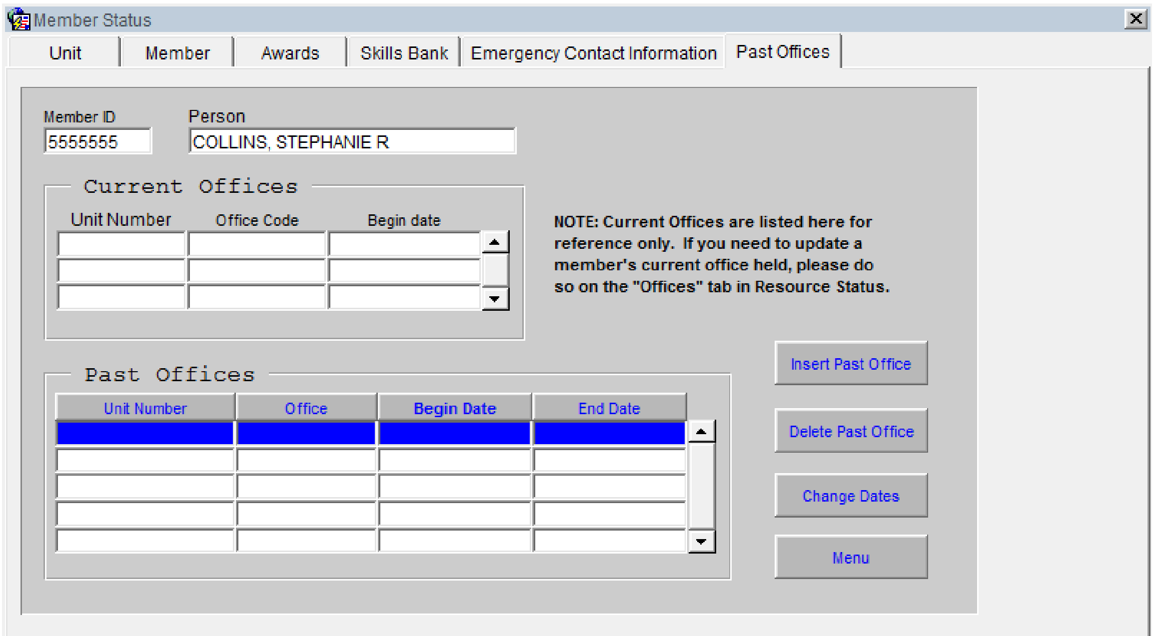


Figure 5-15 Past Offices Tab

4. Click **Insert Past Office**.

The Insert Past Office screen appears, similar to the following:

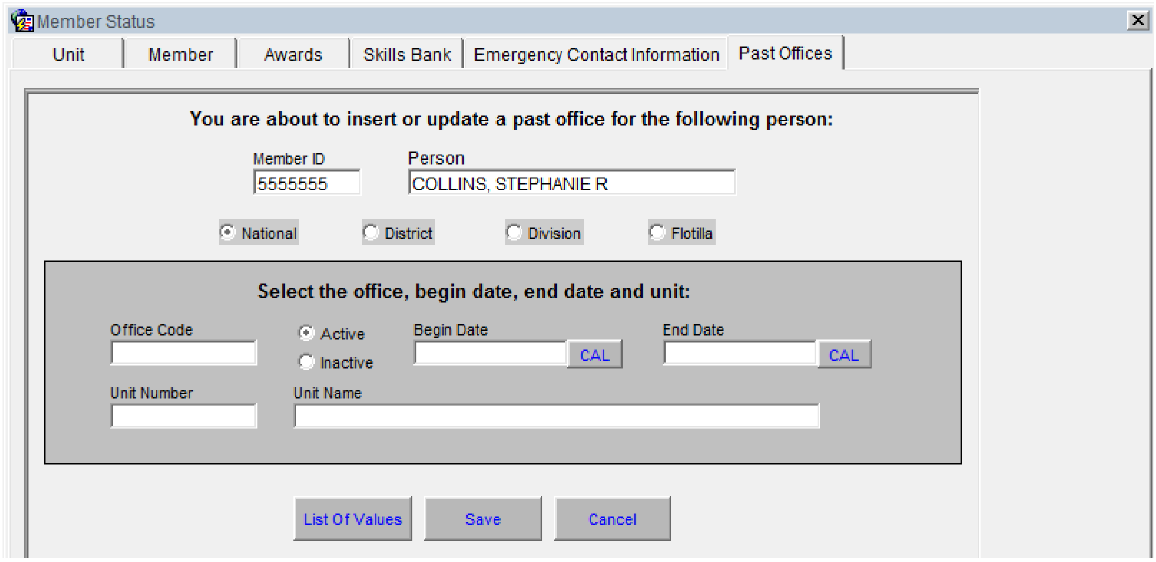


Figure 5-16 Insert Past Offices Screen

5. Select **National**, **District**, **Division**, or **Flotilla** as the level of the member by clicking the appropriate option button.
6. Click the **List of Values** button for the **Office Code** and also for the **Unit Number**.
7. Enter the `{begin date}` and `{end date}`.

NOTE: *By clicking the **CAL** button, a pop-up calendar appears from which to select dates.*

8. Click **Save**.

    A conformation box appears.

9. Click **OK**.

NOTE: *If a warning box appears after clicking **Save**, the past office was not saved.*

5.12 Change Past Office Dates

To change the dates of past offices, perform the following steps:

1. Perform Steps 1-3 of *Section 6.11 Update Past Offices*.

    *The **Past Offices** tab appears, similar to Figure 6-15.*

2. Click **Change Dates**.

    The Change Past Office Dates screen appears, similar to the following:

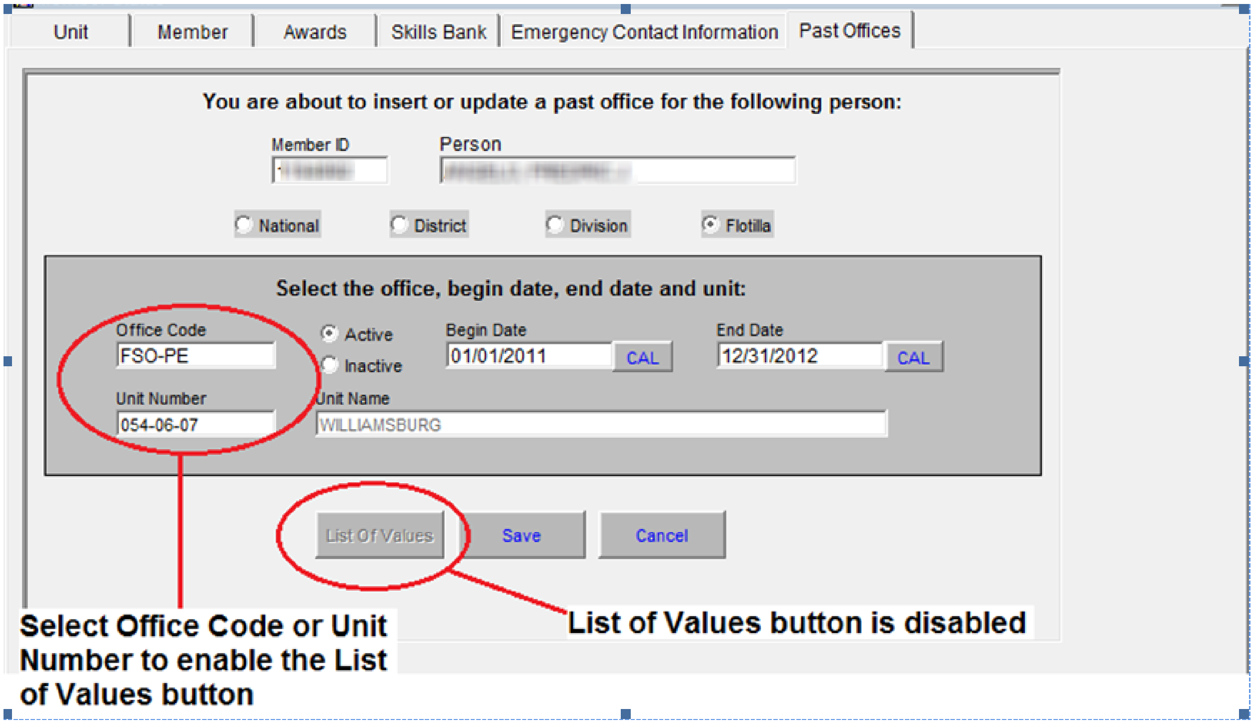


Figure 5-17 Change Past Office Dates Screen

NOTE: *The **List of Values** button is disabled, but can be enabled by selecting the **Office Code** or **Unit Number**.*

3. Change the `{dates}` where needed.
4. Click **Save**.

   A confirmation box appears.

5. Click **OK**.

6. RESOURCE STATUS

AUXDATA allows users to update, insert, and save units, facilities, and officers of units and subordinate units. This section provides instructions for using **Resource Status**. To access the **Resource Status** feature, perform the following step:

1. In the AUXDATA main menu, click **Resource Status**.

   The Unit Selection screen appears, similar to the following:

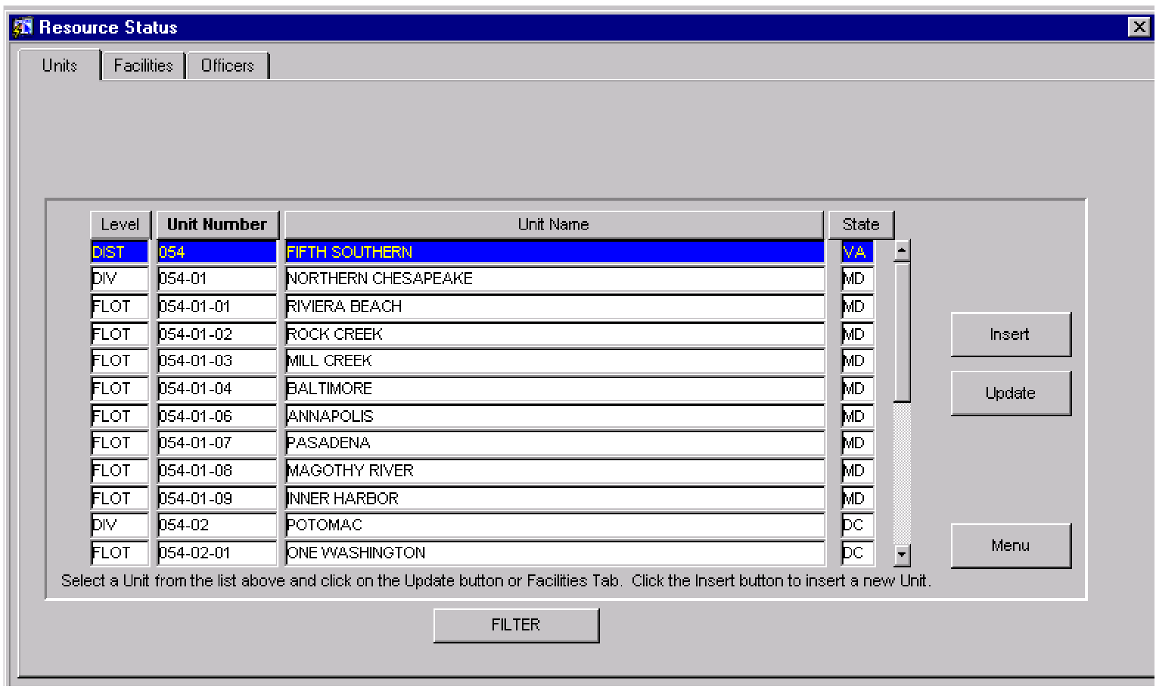


Figure 6-1 Unit Selection Screen

6.1 Insert Unit

To insert a unit, perform the following steps:

1. On the Unit Selection screen similar to Figure 7-1, click **Insert**.

   The Unit Insert screen appears, similar to the following:

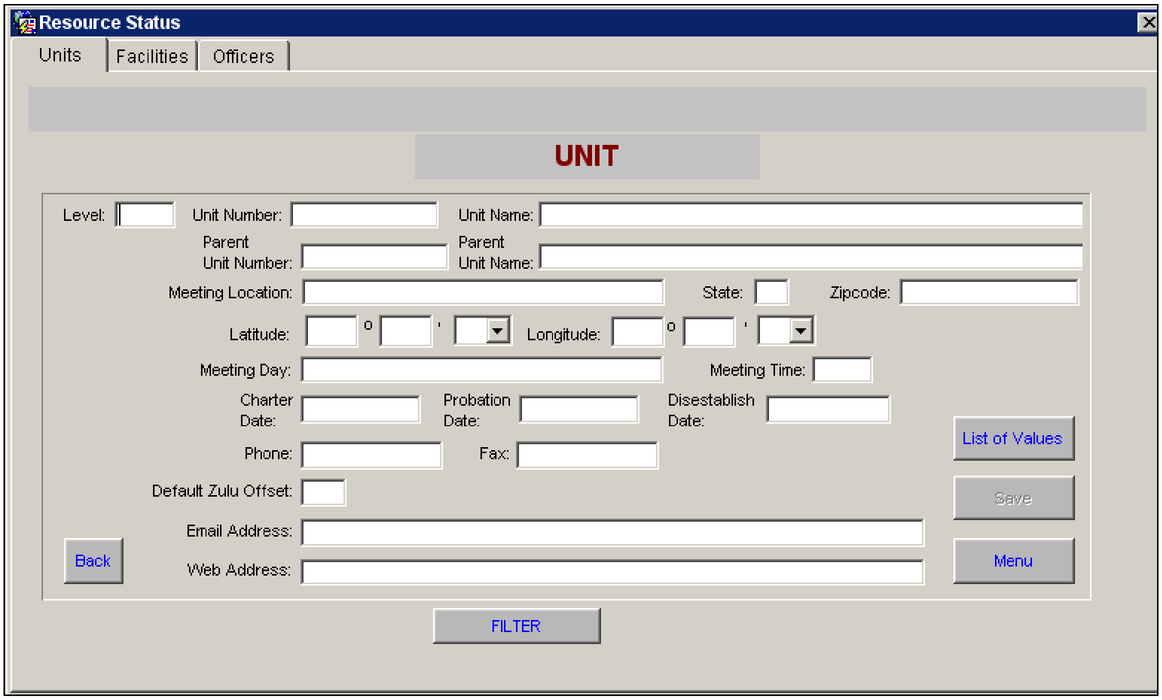


Figure 6-2 Unit Insert Screen

2. Enter the *{necessary unit information}*. Pressing the **TAB** key advances the cursor to the next field. (Use the **List of Values** and list boxes when necessary.) Click **Save**.

   The {unit information} *is entered and saved.*

6.2 Update a Unit

To update a unit, perform the following steps:

1. On the Unit Selection screen, select the *{unit}* to be updated, and then click **Update**.

   The Unit Update screen displaying {the selected unit's information} *appears, similar to the following:*

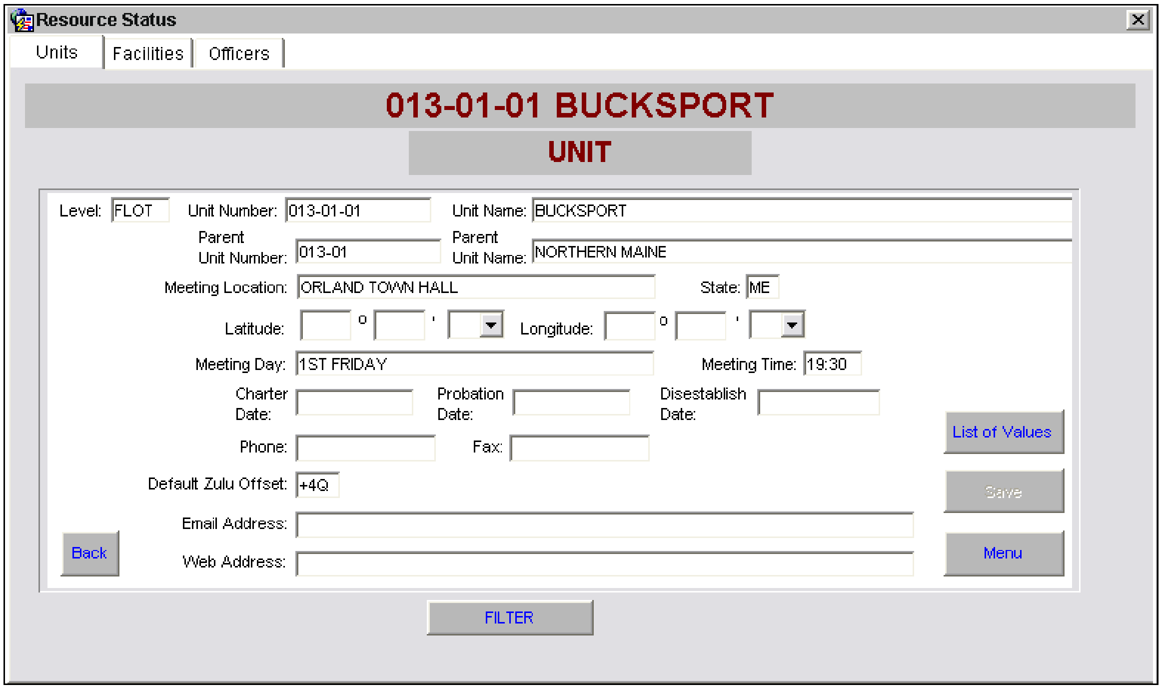


Figure 6-3 Unit Update Screen

2. Enter and/or modify the *{information}* appropriately, and then click **Save**.

   The {information} *is entered and saved.*

6.3 Insert a Facility

The **Facilities** tab allows users to insert and update operational facilities for units and subordinate units. Perform the following steps to insert a facility:

1. On the Unit Selection screen, select the `{desired unit}`, and then click the **Facilities** tab.

    *The **Facilities** tab opens, similar to the following:*

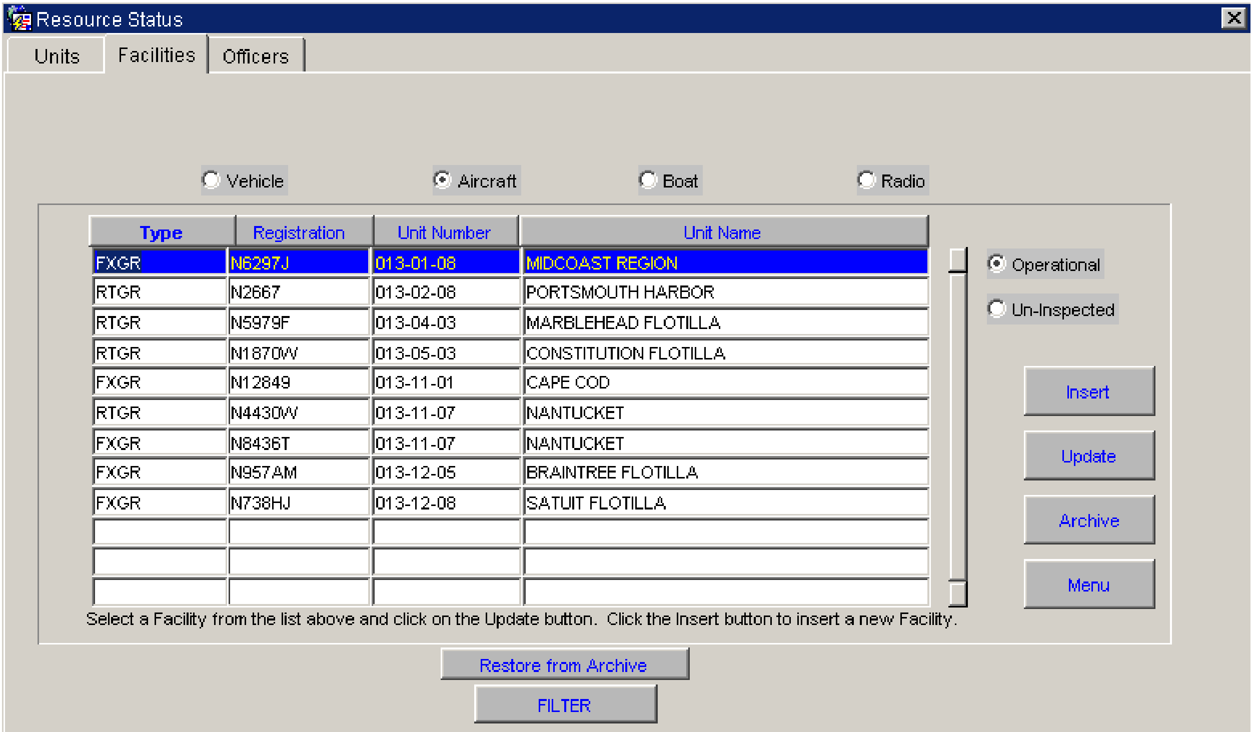


Figure 6-4 Facilities Tab

2. Select the `{facility}` being inserted (**Vehicle**, **Boat**, **Aircraft**, or **Radio**), and then click **Insert**.

    The Facility Insert screen appears, similar to the following:

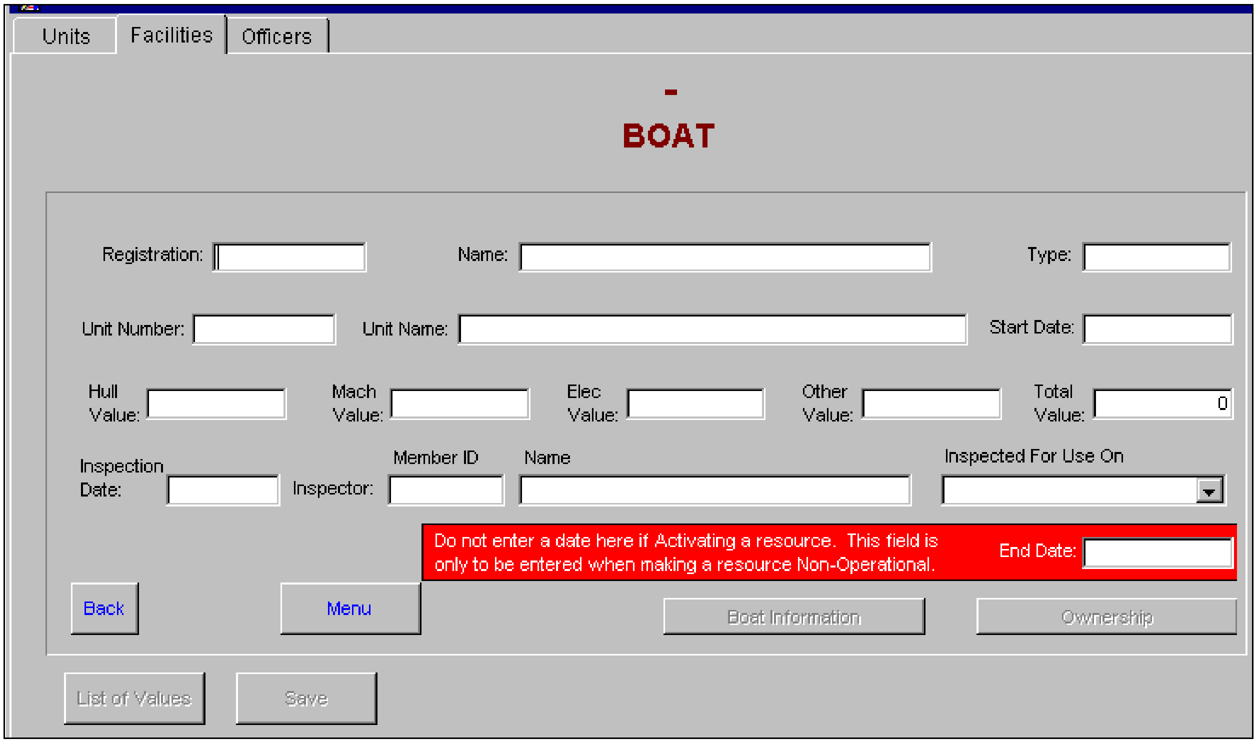


Figure 6-5 Facility Insert Screen

3. Enter the *{required information}*, and then click **Save**.

   The {information} *is entered and saved.*

4. Click the **Boat Information** button.

NOTE: *The information screens for the various facility types (for example, aircraft and radios) may differ somewhat from the Boat Information screen shown in Figure 7-5.*

The Boat Information screen appears, similar to the following:

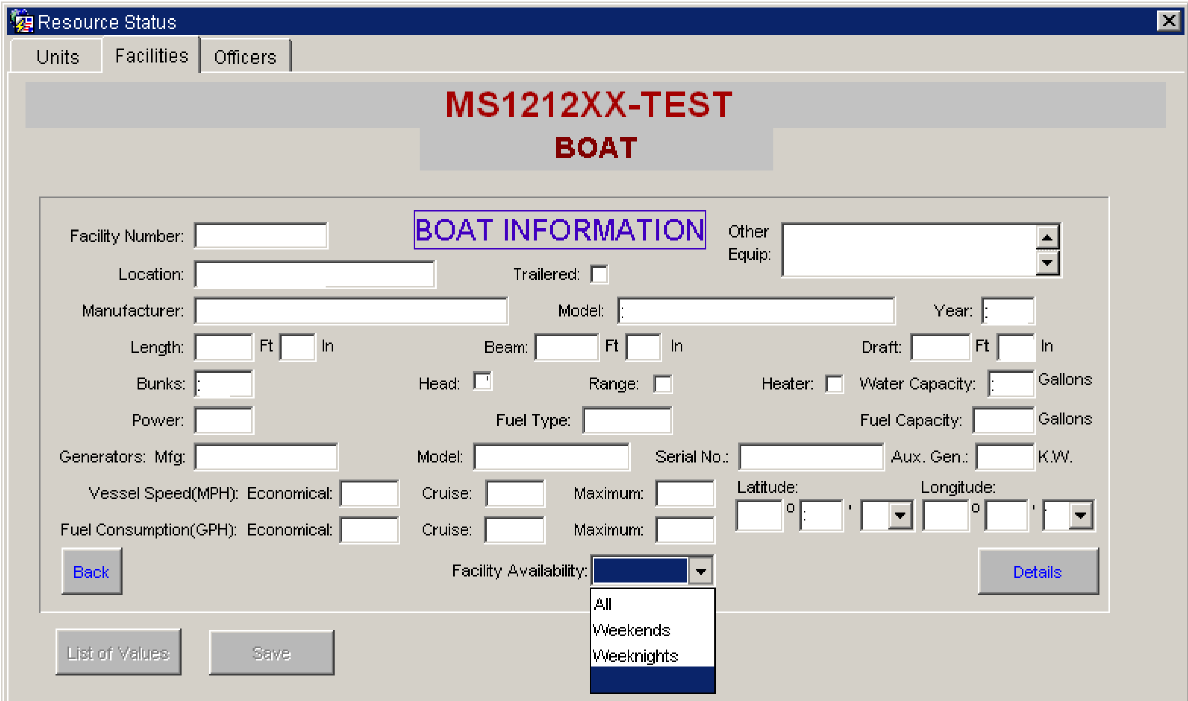


Figure 6-6 Boat Information Screen

5. Enter the `{necessary information}` for the boat. Pressing the **TAB** key advances the cursor to the next field. Use the **List of Values** and list boxes when necessary. Click **Save**.

    The `{information}` *is entered and saved.*

6. Click **Details**.

    The Boat Details screen appears, similar to the following:

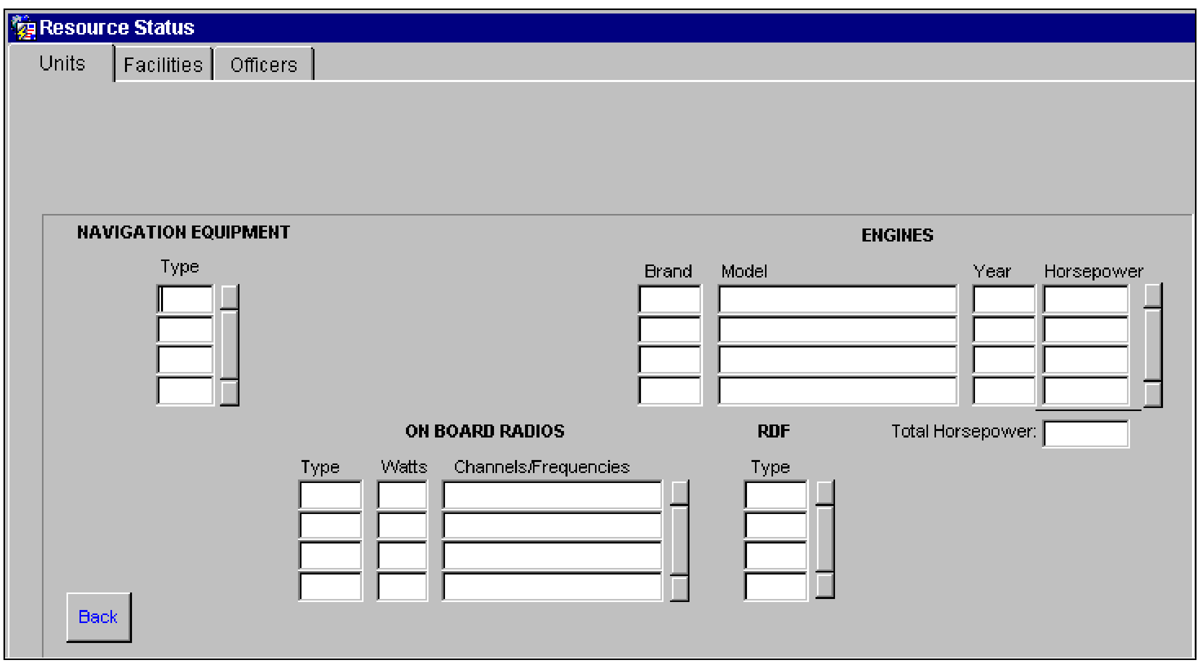


Figure 6-7 Boat Details Screen

7. Enter the *{necessary information}* for the facility. Pressing the **TAB** key advances the cursor to the next field. (Use the **List of Values** and list boxes when necessary.) Click **Save**.

   The {information} *is entered and saved.*

6.4 Update a Facility

To update a facility, perform the following steps:

1. On the Unit Selection screen, select the *{desired unit}*, and then click the **Facilities** tab.

   *The **Facilities** tab opens.*

2. Select the *{desired facility}* to be updated (**Vehicle**, **Boat**, **Aircraft**, or **Radio**), and then click **Update**.

   The Update screen appears.

3. Modify the appropriate fields. Pressing the **TAB** key advances the cursor to the next field. (Use the **List of Values** and list boxes when necessary.) Click **Save**.

   The {information} *is entered and saved.*

4. Click **Ownership**.

   The Owners screen appears, similar to the following:

Figure 6-8 Owners Screen

NOTE: *On the Owners screen, inactive owners appear in red text and should be deleted or updated to keep ownership records current.*

5. Modify the appropriate fields. Pressing the **TAB** key advances the cursor to the next field. (Use the **List of Values** and list boxes when necessary.) Click **Save**.

   The {information} *is entered and saved.*

6.5 Archiving a Resource

The **Archive** button can be used on both operational and un-inspected resources.

1. In the **Facilities** tab, select `{a resource to be archived}`, and then click **Archive** (as shown in [Figure 7-9](#)):

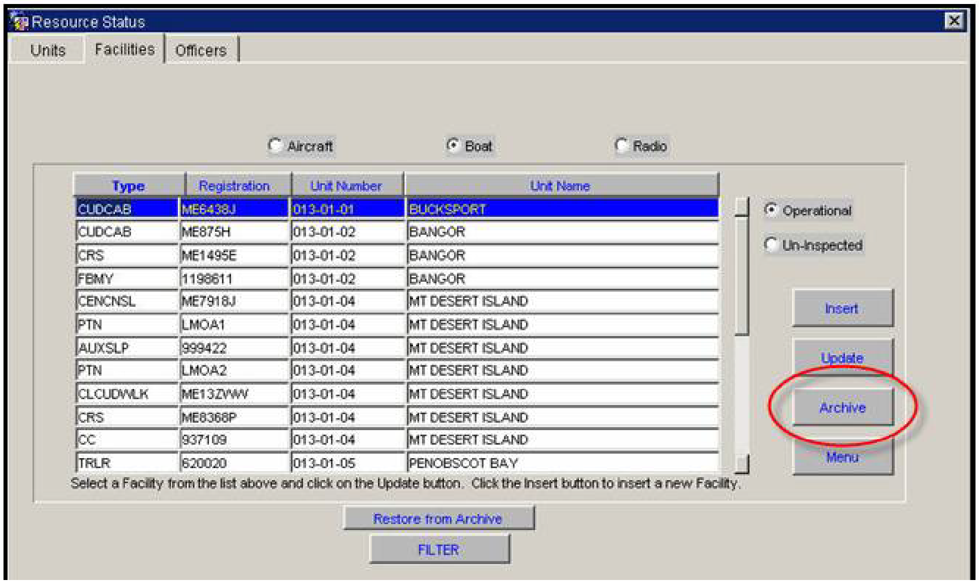


Figure 6-9 Archive Button

NOTE: *The user is unable to navigate to the **Units** or **Officers** tab while archiving a resource. The **Back** and **Menu** buttons also remain disabled until after the user enters a date and selects **Save**.*

A message appears, similar to the following, instructing users to enter a new end date:

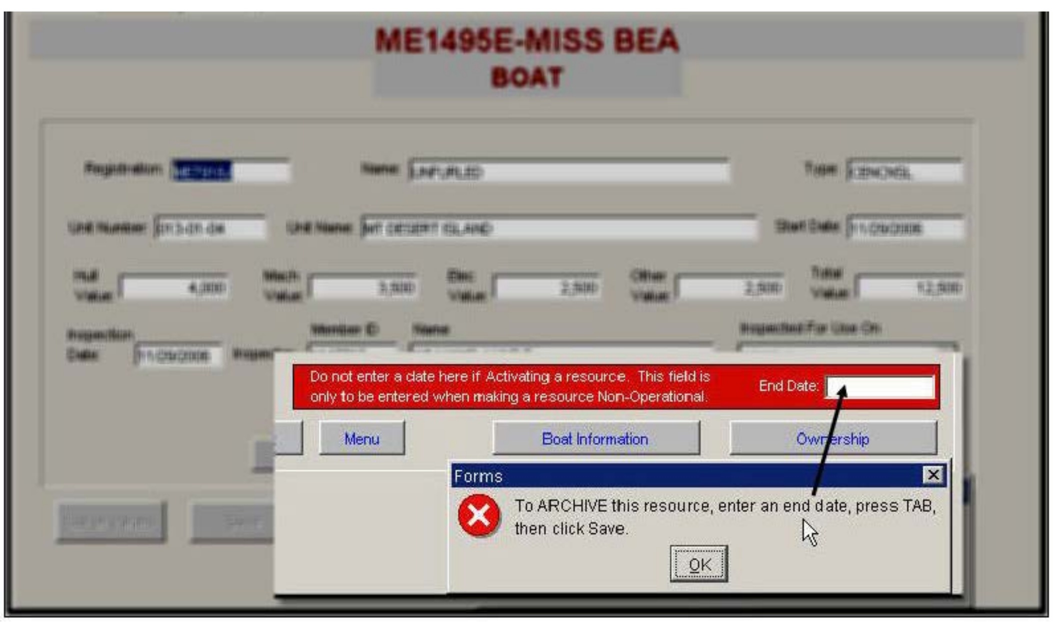


Figure 6-10 Archiving Instruction Message

2. Click **OK**, enter the `{new end date}`, press the **TAB** key, and then click **Save**.

   A warning message appears before the user commits the archive operation.

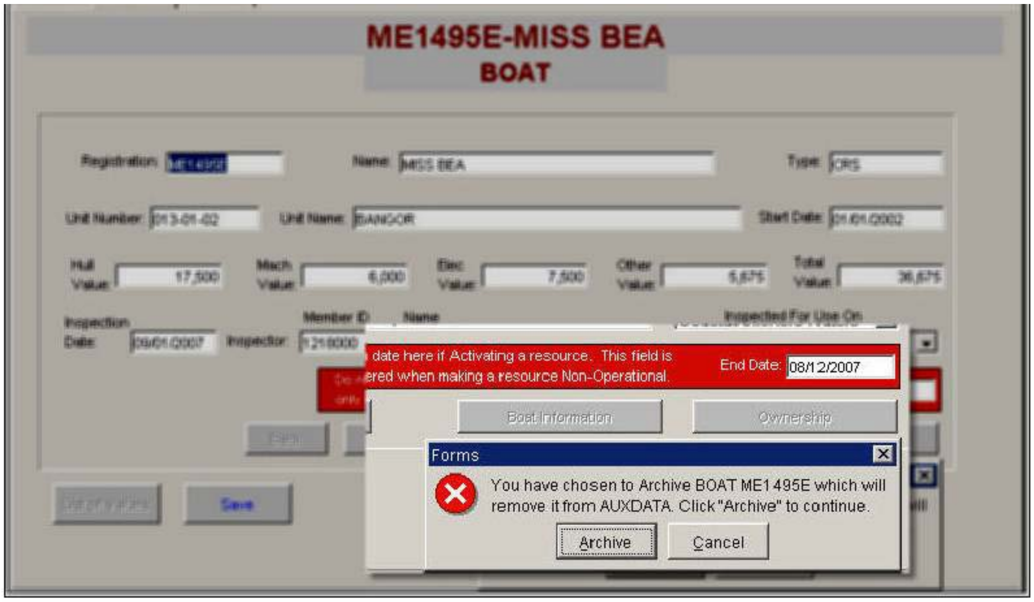


Figure 6-11 Archiving Warning Message

3. Click **Archive**.

6.6 Restoring an Archived Resource

To restore an archived resource, perform the following steps:

1. In the **Facilities** tab, click **Restore From Archive**.

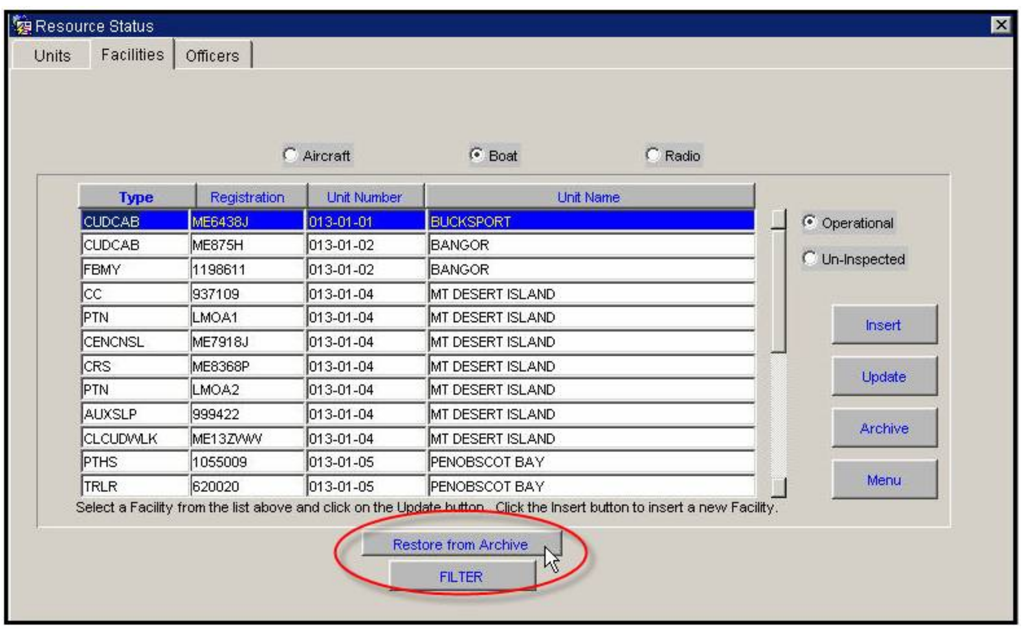


Figure 6-12 Restore From Archive Button

A list of archived resources appears.

2. Filter for the `{resource}` to be restored.

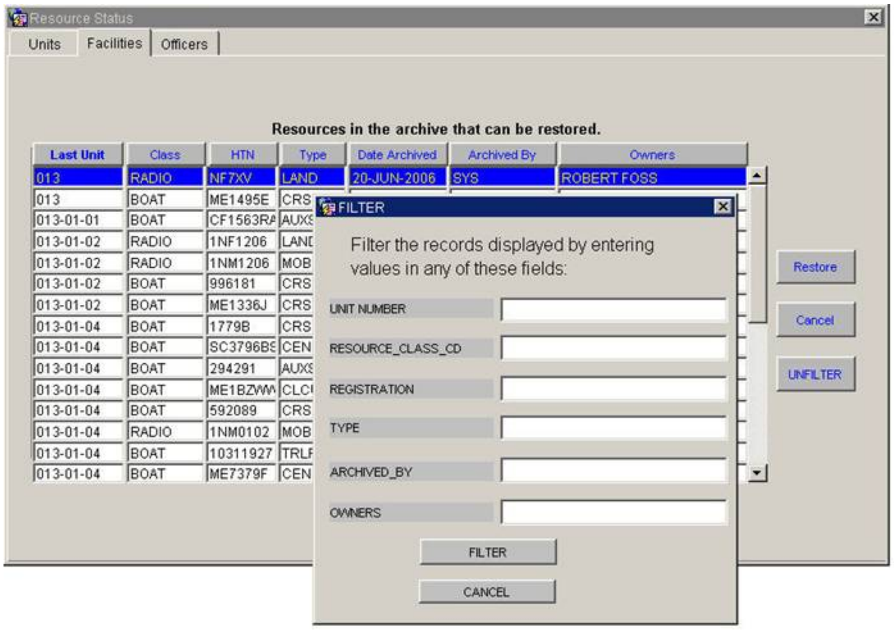


Figure 6-13 Filtering Archived Resources

The archived resource appears.

3. Highlight the archived `{resource}`, and then click **Restore**.

The Restoration form appears, similar to the following:

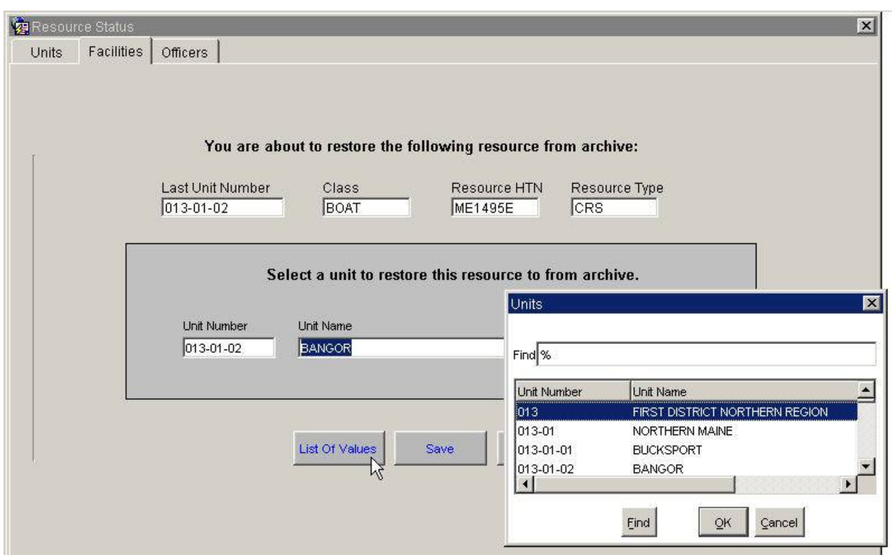


Figure 6-14 Restoration Form

4. Click **List of Values**, select the `{unit}` to which the resource should be restored, and then click **Save**.

A confirmation message appears, instructing the user to enter an inspection date and inspector in order to activate the resource.

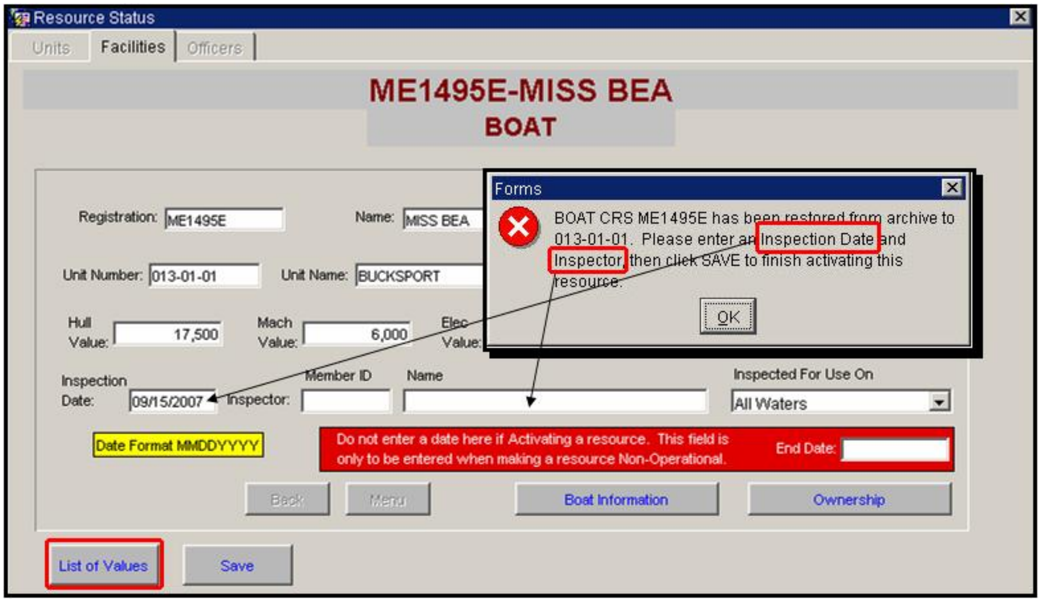


Figure 6-15 Confirmation Message With Instructions

5. Once the inspection date and inspector name have been completed, click **Save**.

6.7 Activating Un-Inspected Facilities

To activate an un-inspected facility, perform the following steps:

1. In the **Units** tab, select the *{unit}* where the facility being activated is located.
2. In the **Facilities** tab, choose which *{facility type}* to activate using the option buttons (**Vehicle, Aircraft, Boat**, or **Radio**). Once the *{appropriate facility type}* appears, click the **Un-Inspected** option button to display all *{un-inspected facilities of the type selected}*, and then select the *{facility}* to activate.
3. Click **Activate**.

   A screen appears, similar to the following, prompting the user to enter a {new resource start date}:

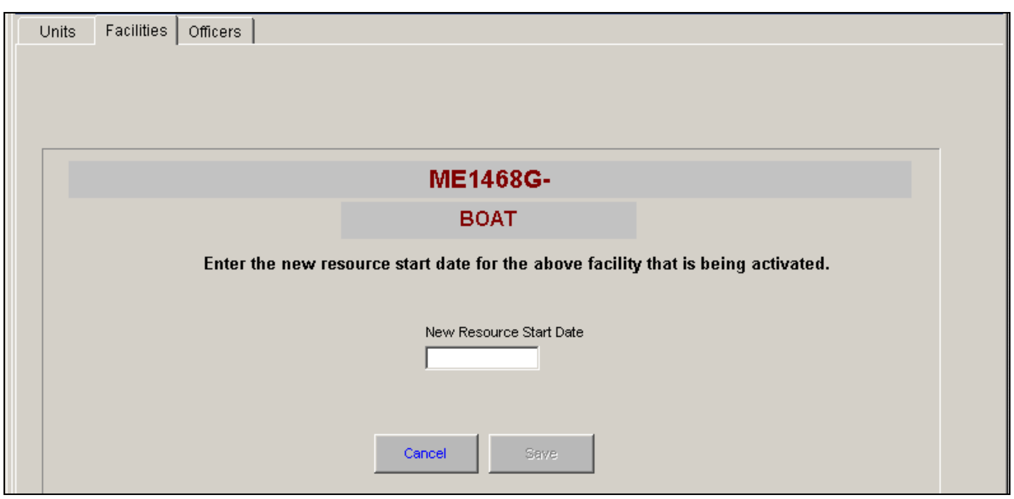


Figure 6-16 Enter New Resource Start Date Screen

4. Enter a *{new resource start date}*, and then click **Save**. After entering the new date, if the **Save** button is not activated, press the **TAB** key.

    The facility is activated.

6.8 Officers Tab

The **Officers** tab can be used to update officer and office code information for a unit and subordinate units. For example, use the **Officers** tab to:

- Enter a new officer (officeholder) for an office
- Create a new office
- Change the rank or description of an existing office
- Inactivate an office code.

NOTE 1: *When an officeholder retires, transfers, or is disenrolled, the system automatically sets the office status to **Vacant Office**, provides an end date for the officeholder's service, and revokes associated system privileges. However, when the vacancy is filled, the **Officers** tab must be used to update the system.*

NOTE 2: *When a member is transferred <u>out</u> of the flotilla, division, or district, AUXDATA automatically sets the office status to **Vacant Office** for all offices held by that member. However, if a member transfers <u>within</u> a division or district, AUXDATA retains that member's office(s).*

6.8.1 Update Officers

To update an officer, perform the following steps:

1. In the **Unit** tab, select the *{desired unit}*, and then click the **Officers** tab.

    *The **Officers** tab opens, similar to the following:*

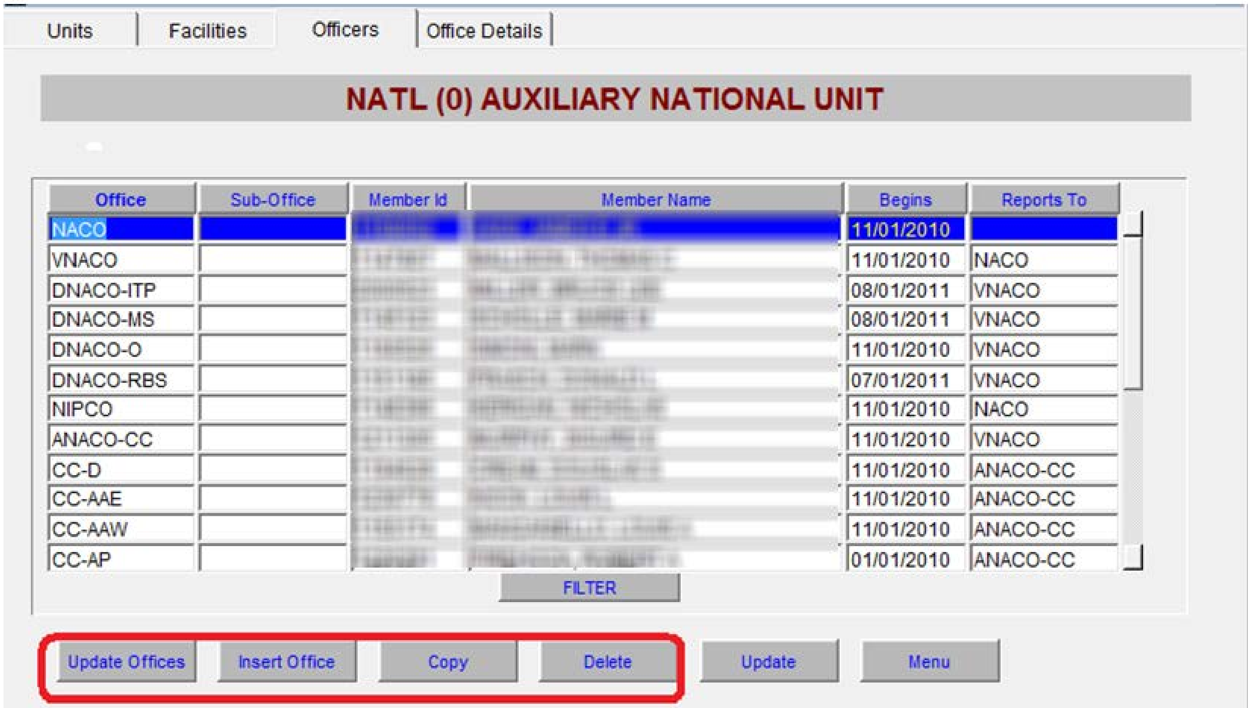


Figure 6-17 Officers Tab

NOTE: *Not all buttons shown in Figure 6-17 are visible to all users.*

- *The four buttons circled in red—**Update Offices**, **Insert Office**, **Copy**, and **Delete**—are visible in AUXDATA only to national-level and district-level users granted the Officer role.*
- *Other users are able to view and utilize only the **Update**, **Menu**, and **Filter** buttons.*

2. Click an *{officer record}* to select it for updating, and then click **Update**.

   The Officer Update screen appears, displaying the {selected officer's information}, *similar to the following:*

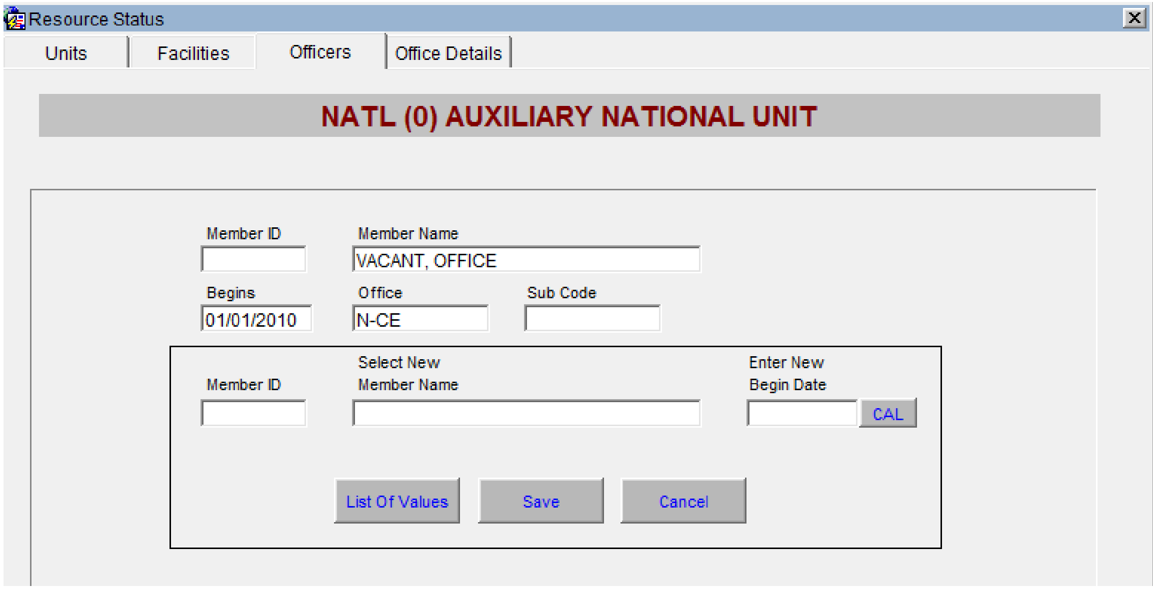


Figure 6-18 Officers Update Screen

3. Enter data in the appropriate (blank) fields, beginning with **Select New Member Name**. Pressing the **TAB** key advances the cursor to the next field. Use the **List of Values** and list boxes when necessary.
4. Click **Save** when finished.

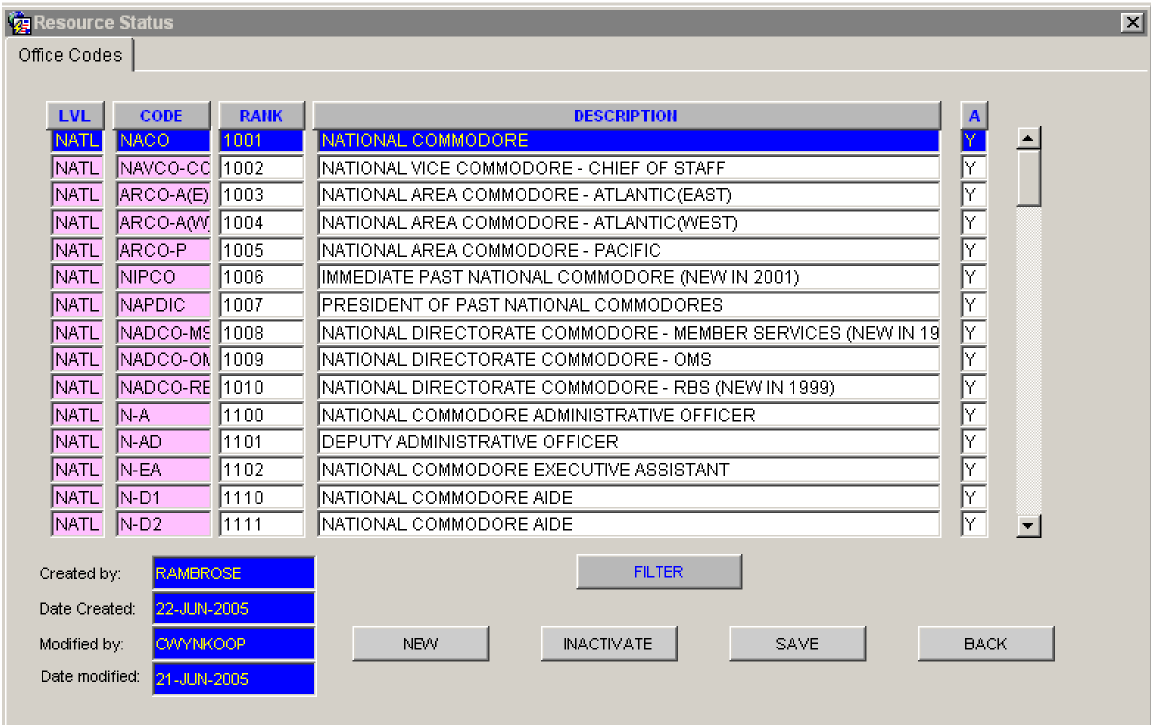
The Officers screen reappears. The officer has been updated.

6.8.2 Update Offices

Users, if granted the Officer role, may update offices as well as officers in the **Officer** tab. To update offices, perform the following steps:

1. In the **Officers** tab, click **Update Offices**.

   The ***Office Codes*** *tab appears, similar to the following:*



LVL	CODE	RANK	DESCRIPTION	A
NATL	NACO	1001	NATIONAL COMMODORE	Y
NATL	NAVCO-CC	1002	NATIONAL VICE COMMODORE - CHIEF OF STAFF	Y
NATL	ARCO-A(E)	1003	NATIONAL AREA COMMODORE - ATLANTIC(EAST)	Y
NATL	ARCO-A(W	1004	NATIONAL AREA COMMODORE - ATLANTIC(WEST)	Y
NATL	ARCO-P	1005	NATIONAL AREA COMMODORE - PACIFIC	Y
NATL	NIPCO	1006	IMMEDIATE PAST NATIONAL COMMODORE (NEW IN 2001)	Y
NATL	NAPDIC	1007	PRESIDENT OF PAST NATIONAL COMMODORES	Y
NATL	NADCO-MS	1008	NATIONAL DIRECTORATE COMMODORE - MEMBER SERVICES (NEW IN 19	Y
NATL	NADCO-OM	1009	NATIONAL DIRECTORATE COMMODORE - OMS	Y
NATL	NADCO-RE	1010	NATIONAL DIRECTORATE COMMODORE - RBS (NEW IN 1999)	Y
NATL	N-A	1100	NATIONAL COMMODORE ADMINISTRATIVE OFFICER	Y
NATL	N-AD	1101	DEPUTY ADMINISTRATIVE OFFICER	Y
NATL	N-EA	1102	NATIONAL COMMODORE EXECUTIVE ASSISTANT	Y
NATL	N-D1	1110	NATIONAL COMMODORE AIDE	Y
NATL	N-D2	1111	NATIONAL COMMODORE AIDE	Y

Figure 6-19 Office Codes Tab

2. To update the `{days}` or description of an office code, click an office record to select it, and then enter the `{revised information}` in the **Rank** or **Description** fields.
3. To create a new `{office code}`, click **New**.

   A new line is highlighted in the ***Office Codes*** *tab. The office* ***Code***, ***Rank,*** *and* ***Description*** *fields are blank.*

4. Complete the blank fields, and then click **Save**.

Another button—the **Inactivate** button—is visible in the **Office Codes** tab for only national-level users granted the Officer role. (This button is not visible or accessible to other users.)

NOTE: *An office code can be inactivated only if an officer record is* <u>*not*</u> *associated with that office code.*

To inactivate an office code, the national-level user should select the `{office}`, click **Inactivate**, and then click **Save**.

The ***A*** *(****Activate****) field changes from* ***Y*** *(yes) to* ***N*** *(no), and the inactivated office record no longer appears in the* ***Officer*** *tab.*

6.8.3 Copy Officers

Under certain circumstances, the user can copy an officer record in the **Officers** tab. Copying records can reduce data entry in the officer management process. A user can copy an officer record if:

- The user is a national (NATL) or district (DIST) user granted the Officer role and
- For DIST users, the officer record involves an ADSO, VPPCA, or RCO office code.

To copy a record, click the `{officer record}` to be copied, and then click **Copy**.

*The record is copied, with the **Member Name** set to vacant office and the **Member ID** field blank.*

6.8.4 Delete Officers

A user can delete an officer record under the following circumstances:

- The user is a NATL or DIST user granted the Officer role and
- The office is set to vacant.

NOTE: *The user cannot delete an officer when a specific officer record is associated with the office code. In other words, the office must show as vacant in the **Officer** tab before the record can be deleted.*

To delete an officer record, click the `{officer record}` to be deleted, and then click **Delete**.

*The record is deleted and disappears from the **Officers** tab.*

7. REPORTS

This section provides instructions for using the **Reports** feature. AUXDATA allows users to run several types of reports. These reports are generated in the following two formats: .**pdf** and .**csv**.

To access the **Reports** feature, perform the following step:

1. In the AUXDATA main menu, click **Reports**.

   *The **Reports** menu appears, similar to the following:*

Figure 7-1 AUXDATA Reports Menu

NOTE 1: *To view the reports after clicking **Submit** in the next several sets of instructions, it may be necessary to open the appropriate internet browser window. The open windows can be viewed at the bottom left of the screen, similar to [Figure 7-2](#), by pointing the cursor to the*  *icon in the task bar. The user then points to and clicks the appropriate window to open it and view the report.*

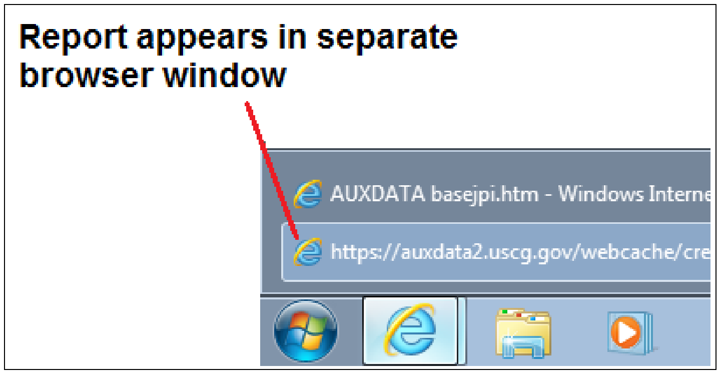


Figure 7-2 Open Browser Windows in Task Bar

NOTE 2: *In the report parameters screens (discussed in the next several sections), users may or may not see a* {unit} *list box from which to specify a* {unit}*; it depends on whether the user has multiple units. If no* {unit} *list box appears, the user simply skips the step for selecting a* {unit}*, because their one* {unit} *is the default.*

7.1 Activity Logs

The **Activity Logs** feature allows users to run an Activity Log report for a user-specified time frame. To run this report, perform the following steps:

1. In the **Reports** menu, click **Activity Logs**.

   The Activity Logs Report Parameters screen appears, similar to the following:

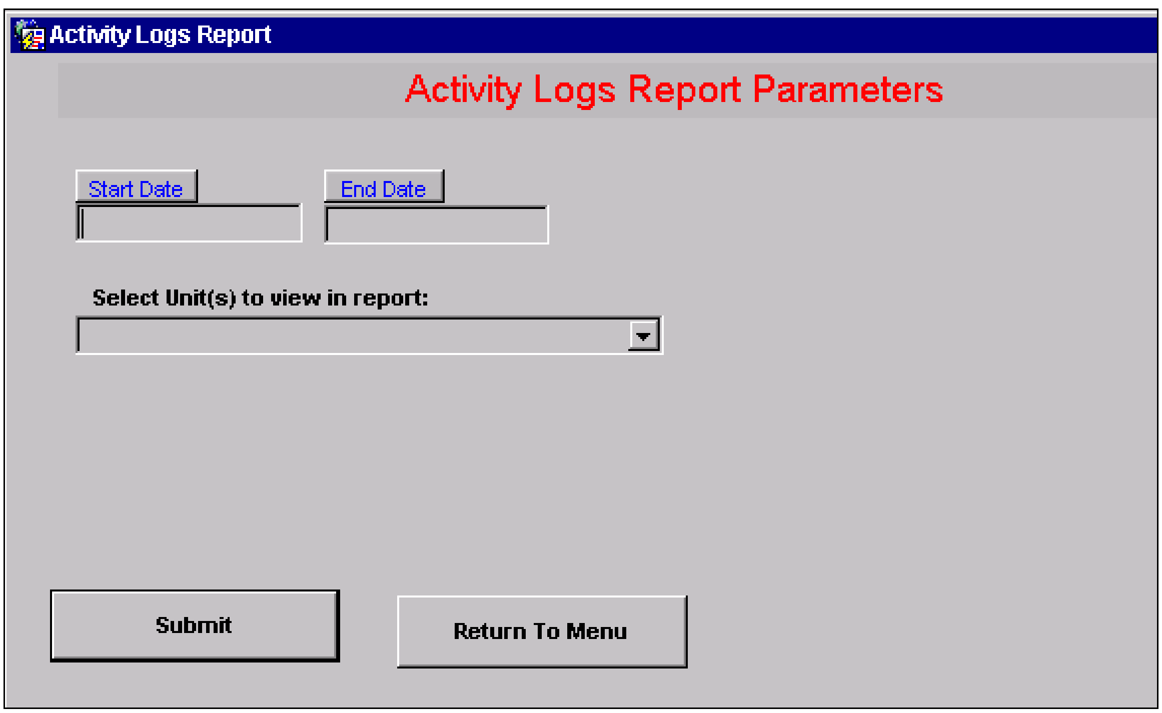
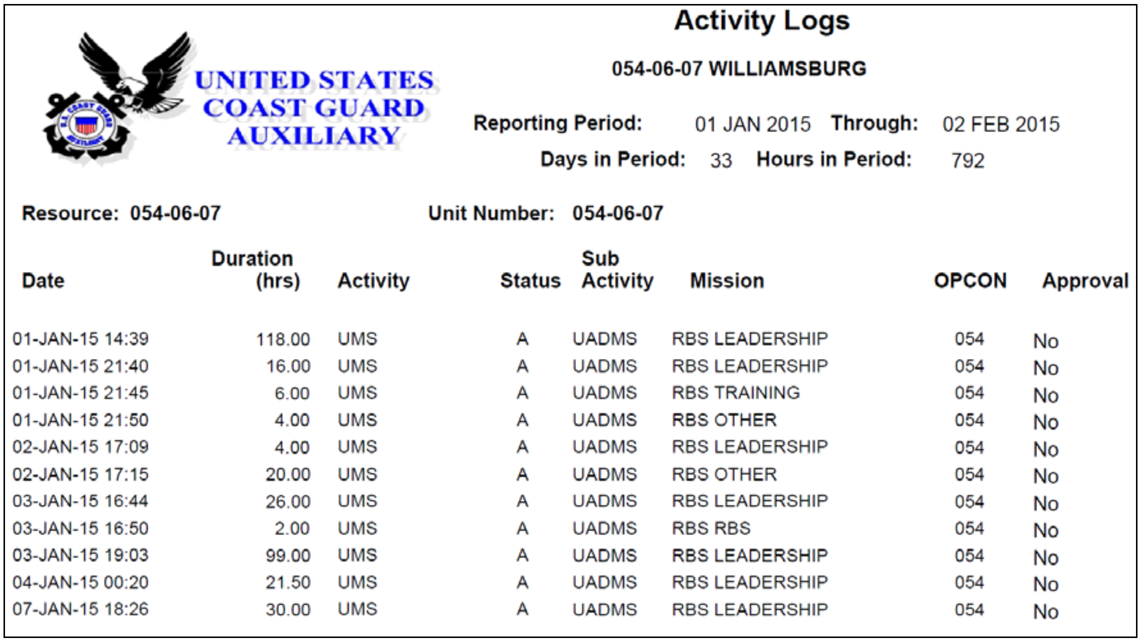


Figure 7-3 Activity Logs Report Parameters Screen

2. Enter the *{start date}* and *{end date}* desired, select the *{unit}* to be viewed using the list box, and then click **Submit**.

The Activity Logs Report screen, similar to the following, opens in a separate internet browser window:



Activity Logs

054-06-07 WILLIAMSBURG

Reporting Period: 01 JAN 2015 **Through:** 02 FEB 2015

Days in Period: 33 **Hours in Period:** 792

Resource: 054-06-07 **Unit Number:** 054-06-07

Date	Duration (hrs)	Activity	Status	Sub Activity	Mission	OPCON	Approval
01-JAN-15 14:39	118.00	UMS	A	UADMS	RBS LEADERSHIP	054	No
01-JAN-15 21:40	16.00	UMS	A	UADMS	RBS LEADERSHIP	054	No
01-JAN-15 21:45	6.00	UMS	A	UADMS	RBS TRAINING	054	No
01-JAN-15 21:50	4.00	UMS	A	UADMS	RBS OTHER	054	No
02-JAN-15 17:09	4.00	UMS	A	UADMS	RBS LEADERSHIP	054	No
02-JAN-15 17:15	20.00	UMS	A	UADMS	RBS OTHER	054	No
03-JAN-15 16:44	26.00	UMS	A	UADMS	RBS LEADERSHIP	054	No
03-JAN-15 16:50	2.00	UMS	A	UADMS	RBS RBS	054	No
03-JAN-15 19:03	99.00	UMS	A	UADMS	RBS LEADERSHIP	054	No
04-JAN-15 00:20	21.50	UMS	A	UADMS	RBS LEADERSHIP	054	No
07-JAN-15 18:26	30.00	UMS	A	UADMS	RBS LEADERSHIP	054	No

Figure 7-4 Activity Logs Report Screen

7.2 Auxiliary Unit Listing

The **Auxiliary Unit Listing** feature allows users to run a report listing all units in the Auxiliary. To run an Auxiliary Unit Listing report, perform the following steps:

1. In the **Reports** menu, click **Auxiliary Unit Listing**.

   The Auxiliary Unit Listing Report Parameters screen appears, similar to the following:

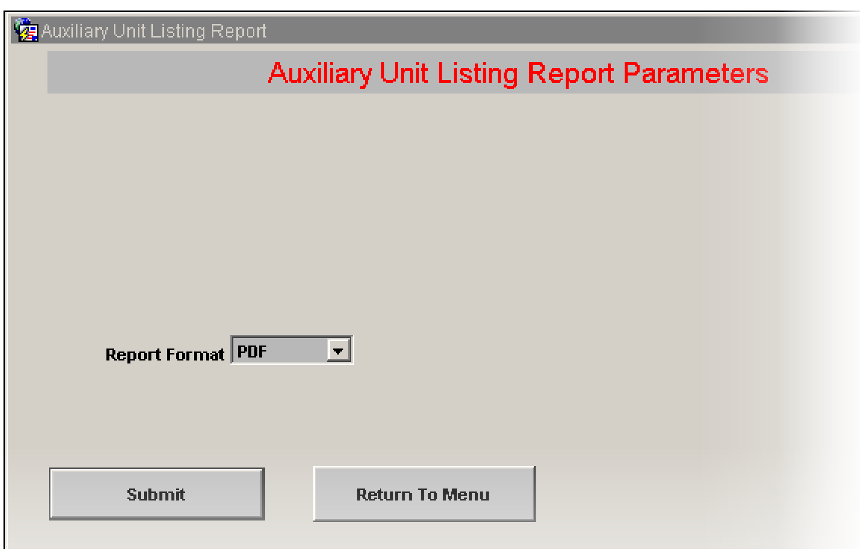
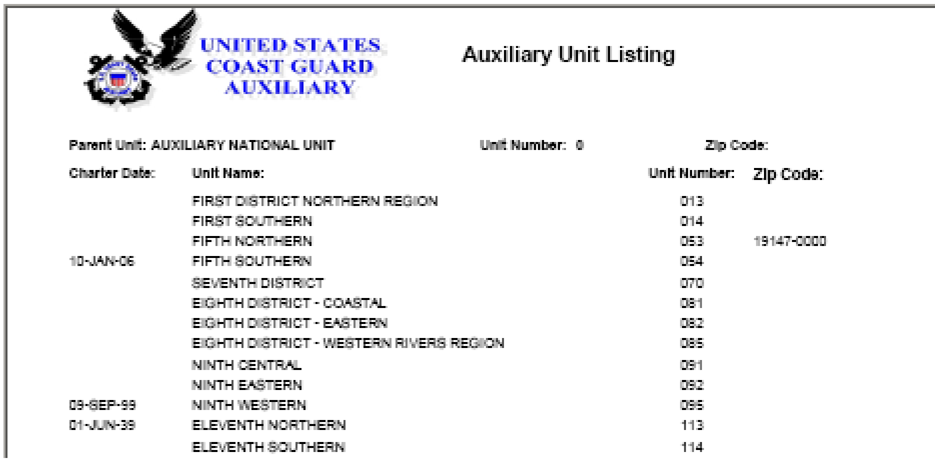


Figure 7-5 Auxiliary Unit Listing Report Parameters Screen

2. Use the list box to select the `{desired report format}` (**PDF** or **CSV)**.

3. Click **Submit**.

The Auxiliary Unit Listing report, similar to the following (shown in PDF format), opens in a separate browser window:


UNITED STATES COAST GUARD AUXILIARY

Auxiliary Unit Listing

Parent Unit: AUXILIARY NATIONAL UNIT   Unit Number: 0   Zip Code:

Charter Date:	Unit Name:	Unit Number:	Zip Code:
	FIRST DISTRICT NORTHERN REGION	013	
	FIRST SOUTHERN	014	
	FIFTH NORTHERN	053	19147-0000
10-JAN-06	FIFTH SOUTHERN	054	
	SEVENTH DISTRICT	070	
	EIGHTH DISTRICT - COASTAL	081	
	EIGHTH DISTRICT - EASTERN	082	
	EIGHTH DISTRICT - WESTERN RIVERS REGION	085	
	NINTH CENTRAL	091	
	NINTH EASTERN	092	
09-SEP-99	NINTH WESTERN	095	
01-JUN-39	ELEVENTH NORTHERN	113	
	ELEVENTH SOUTHERN	114	

Figure 7-6 Auxiliary Unit Listing Screen

7.3 Crew Underway Time

The Crew Underway Time report shows crew hours, for the selected unit, for a user-defined period of time. To run this report, perform the following steps:

1. In the **Reports** menu, click **Crew Underway Time**.

The Crew Underway Time Report Parameters screen appears, similar to the following:

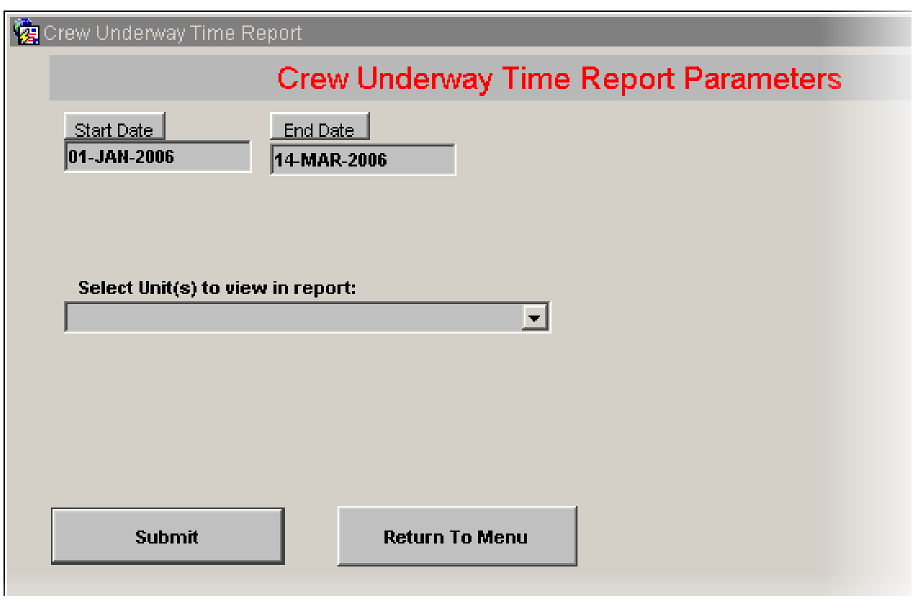
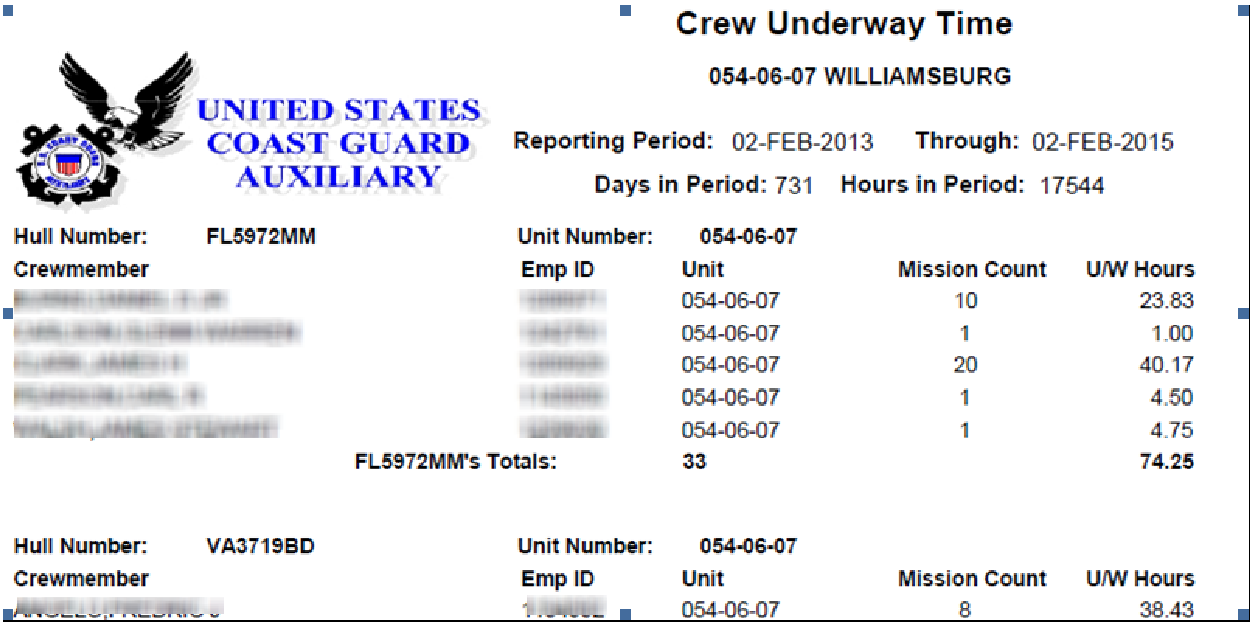


Figure 7-7 Crew Underway Time Report Parameters Screen

2. Enter the `{start date}` and `{end date}` desired, select the `{unit}` to be viewed using the list box, and then click **Submit**.

The Crew Underway Time report, similar to the following, opens in a separate browser window:



Crew Underway Time

054-06-07 WILLIAMSBURG

UNITED STATES COAST GUARD AUXILIARY

Reporting Period: 02-FEB-2013 **Through:** 02-FEB-2015

Days in Period: 731 **Hours in Period:** 17544

Hull Number: FL5972MM **Unit Number:** 054-06-07

Crewmember	Emp ID	Unit	Mission Count	U/W Hours
[redacted]	[redacted]	054-06-07	10	23.83
[redacted]	[redacted]	054-06-07	1	1.00
[redacted]	[redacted]	054-06-07	20	40.17
[redacted]	[redacted]	054-06-07	1	4.50
[redacted]	[redacted]	054-06-07	1	4.75
FL5972MM's Totals:		33		74.25

Hull Number: VA3719BD **Unit Number:** 054-06-07

Crewmember	Emp ID	Unit	Mission Count	U/W Hours
[redacted]	[redacted]	054-06-07	8	38.43

Figure 7-8 Crew Underway Time Screen

7.4 Resources by Flotilla

The Resources by Flotilla report displays resources assigned to the selected unit. To run this report, perform the following steps:

1. In the **Reports** menu, click **Resources by Flotilla**.

   The Resources by Flotilla Report Parameters screen appears, similar to the following:

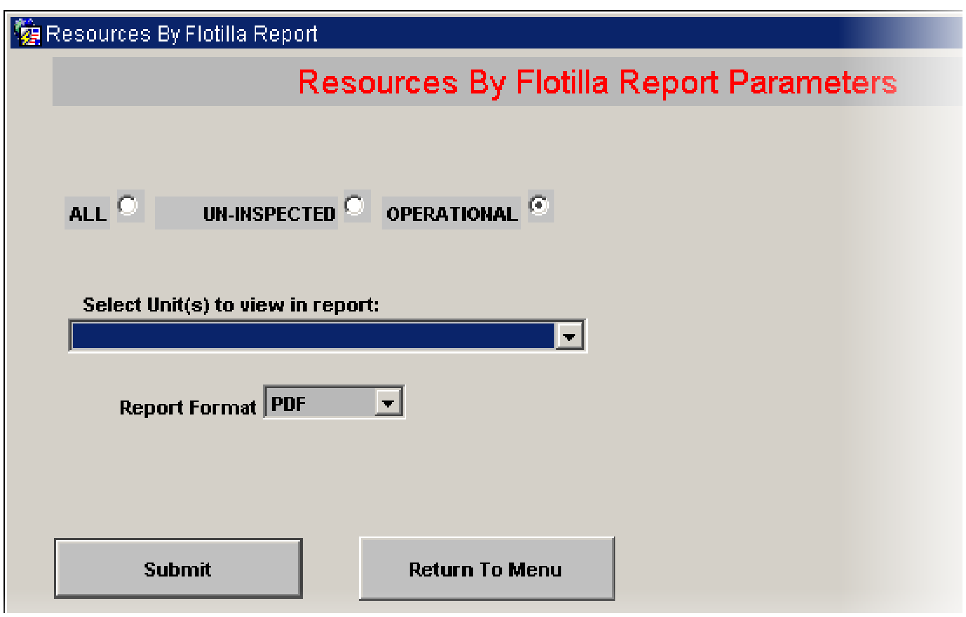


Figure 7-9 Resources by Flotilla Report Parameters Screen

2. Click the appropriate option button to select one of the following report options to define the status of resources to appear in the report:
    - **All** resources
    - **Un-inspected** resources only
    - **Operational** resources only.
3. Using the list box, select the *{unit}* to be included in the report.
4. Select either **CSV** or **PDF** from the **Report Format** list box.
5. Click **Submit**.

    The Resources by Flotilla screen, similar to the following (shown in PDF format), opens in a separate browser window:

UNITED STATES COAST GUARD AUXILIARY

Resources By Flotilla

054-06-07 WILLIAMSBURG

Unit Number	Availability	Class Code	Resource Name	Facility Number	Resource Length	Hull/Tail	Inspection Date	Trail	Lat.	Long.	Owner	Emp ID
054-06-07	All	B	WHO KNOWS	23118	23 ' 6 "	VA4118BU	12-MAR-14	Y	37-19.5-N	76-45.7-	[illegible]	[illegible]
054-06-07	All	B	NO NAME	19467	19 ' 0 "	VA8467AJ	22-APR-14	Y	37-16.2-N	76-40.9-W	[illegible]	[illegible]
054-06-07	All	B	17972 OSPREY	17972	17 ' 5 "	FL5972MM	28-APR-14	Y	37-20.4-N	76-44.8-W	[illegible]	[illegible]
054-06-07	All	B	14100	14100	14 ' - "	VA6100TT	24-APR-14	Y	37-14.3-N	76-48-W	[illegible]	[illegible]
054-06-07	All	B	22696 FREEDOM	22696	22 ' - "	VA7696AR	13-AUG-14	Y	37-25.9-N	76-48.3-W	[illegible]	[illegible]
054-06-07	All	B	25719 TROPHY WIFE	25719	25 ' 6 "	VA3719BD	23-MAY-14	N	37-14.3-N	76-51.5-W	[illegible]	[illegible]
054-06-07	-	B	ENTERPRISE	123456	30 ' - "	NCC1701	14-DEC-14	N	--	--	PRALL, JENNIFER L(P)	2222222

Figure 7-10 Resources by Flotilla Screen

7.5 E-mail Directory

The **E-mail Directory** feature allows users to run an E-mail Directory report by unit. To run this report, perform the following steps:

1. In the **Reports** menu, click **E-mail Directory**.

    The Email Directory Report Parameters screen appears, similar to the following:

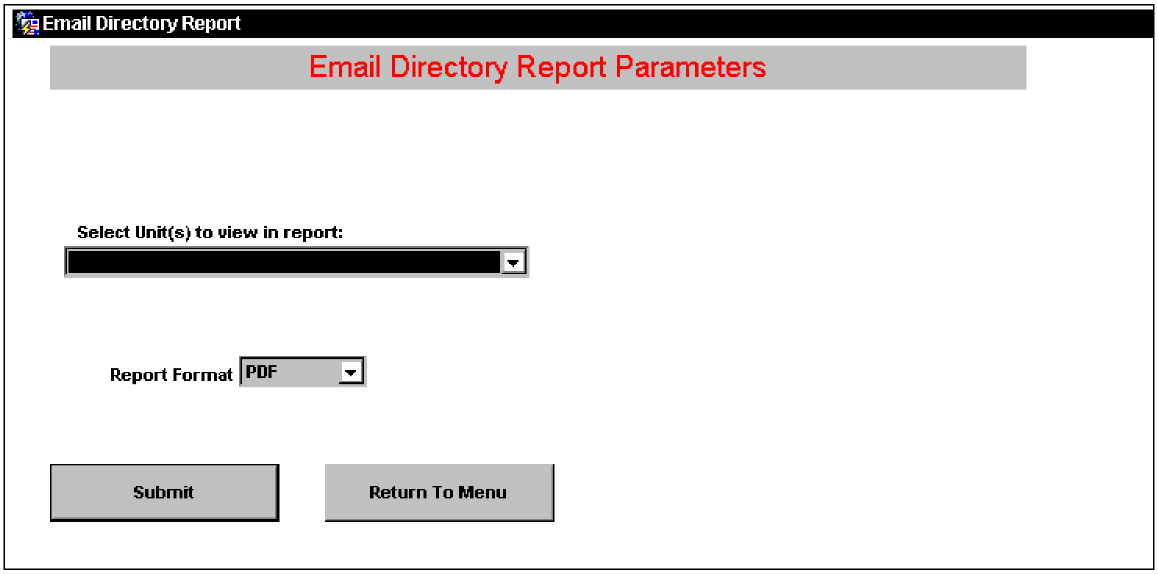


Figure 7-11 Email Directory Report Parameters Screen

2. Click the arrow for the list box, and then select the `{desired unit}`.

    The unit appears in the box.

3. Select either **CSV** or **PDF** from the **Report Format** list box.

4. Click **Submit**.

    The E-mail Directory screen, similar to the following (shown in PDF format), opens in a separate browser window:

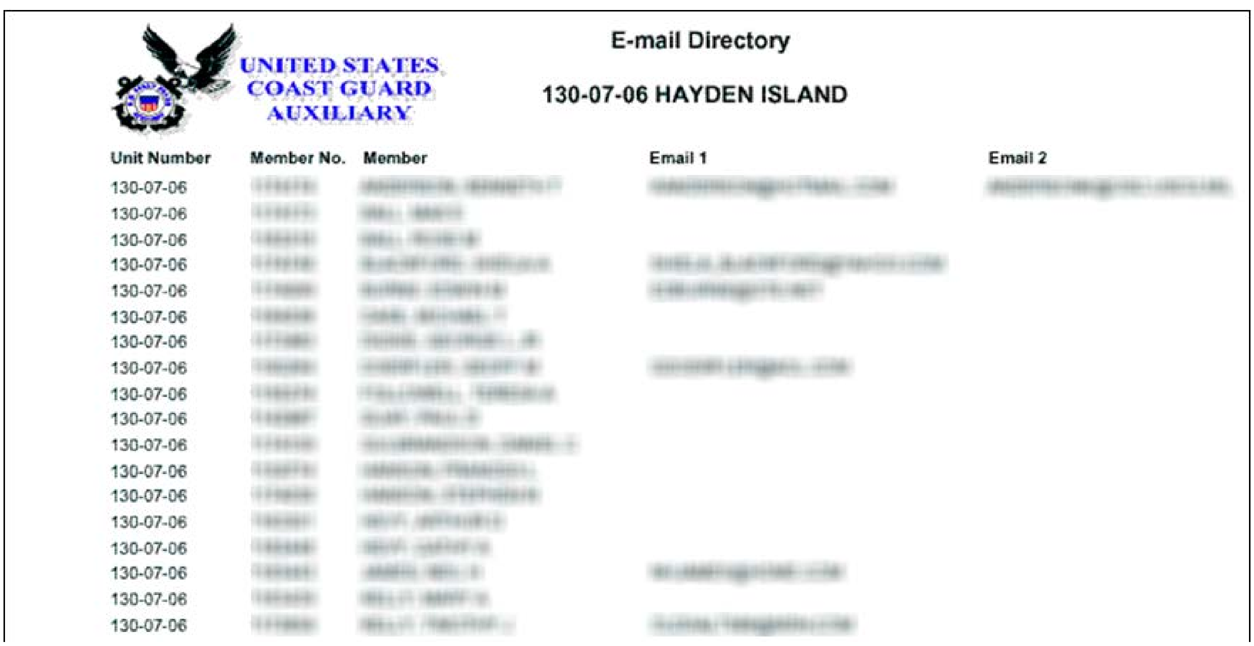


Figure 7-12 E-mail Directory Screen

7.6 Member Roster

The Member Roster report lists members at a selected unit(s), with information such as employment ID, address, e-mail address, phone number, and other contact information. Optionally, the Member Roster report may be printed as mailing labels. Users can filter this report using a number of parameters, including:

- Membership—all members or only active or inactive members
- User-specified competencies
- User-specified offices
- Time period covered (based on a user-specified status date)
- Output—as a report or as mailing labels
- By State.

To generate this report, perform the following steps:

1. In the **Reports** menu, click **Member Roster**.

   The Member Roster Report Parameters screen appears, similar to the following (keyed to corresponding step numbers):

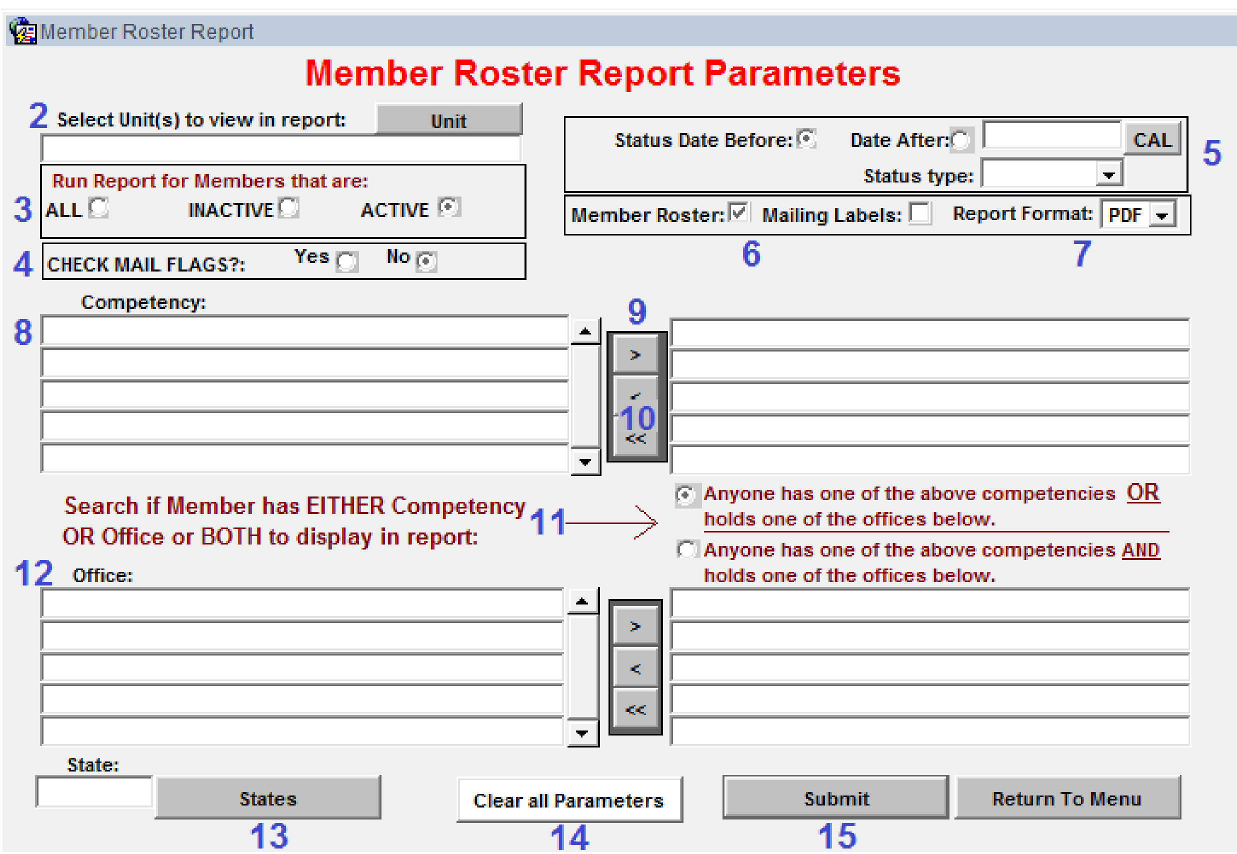


Figure 7-13 Member Roster Report Parameters Screen

2. Click **Unit**, and then select the *`{unit}`* to be covered by the report from the resulting **List of Values**. Use the filter search capabilities, if needed, to display only units meeting the filter criteria.

NOTE: `{Unit}` *is a required parameter.* `{Office}` *and* `{State}` *(see below) are optional and cannot be selected without first selecting the* `{unit}`.

3. Click the appropriate option button to select one of the following membership status categories to display in the report:
    - **All** members
    - **Inactive** members only
    - **Active** members only.
4. Click the appropriate option button with regard to checking mail flags.
5. Set *`{date}`* parameters for the report.
    - First select a *`{date}`*, and then click **CAL** to use the calendar selection screen.
    - Click the appropriate option button to indicate whether the report should include members with status dates occurring before or after the *`{selected date parameter}`*.
    - If the user wishes to limit the report to a specific *`{status type}`*, use the **Status type** list box to select the *`{desired status type}`*.
6. Click the appropriate check box to select the *`{desired report output}`*—**Member Roster** or **Mailing Labels**.
7. In the **Report Format** list box, select either **PDF** or **CSV**.
8. To select a *`{competency}`*, first click the *`{competency}`* to highlight it.
9. Click > to move all highlighted competencies to the right side of the form, thereby selecting them for the report.
10. To remove (reverse) selections, click the *`{selected competencies}`* to highlight, and then click < to reverse (remove) highlighted selections. Alternatively, click << to remove (that is, reverse) all selections, highlighted or not.
11. Click the appropriate option button to specify one of the following:
    - Whether an individual must hold at least one of the selected competencies <u>or</u> at least one of the selected offices
    - Whether an individual must hold at least one selected competency <u>and</u> at least one selected office.
12. To select *`{offices}`* for the report, follow the same procedure used to select competencies: first highlight the *`{desired office}`*. Then click > to select the highlighted *`{offices}`* or click < or << to remove selections.
13. To limit the report to a particular State, click **States**, and then select the *`{State}`* from the resulting **List of Values**.

NOTE: If a `{State}` *is selected (optional), the report will comprise only members from units located in that state.*

14. Click **Clear all Parameters** to clear the form of parameters entered.

15. Click **Submit** to generate the report.

The Member Roster screen, similar to the following (shown in PDF format), opens in a separate browser window:

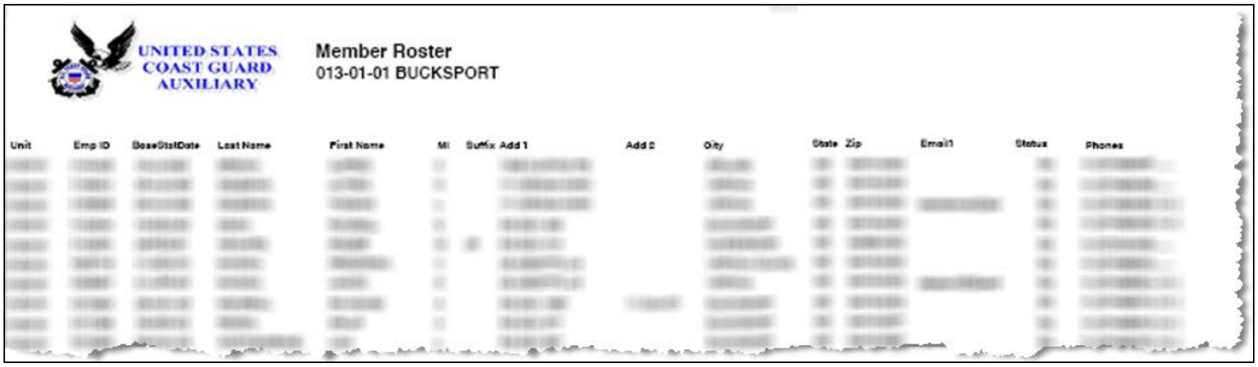


Figure 7-14 Member Roster Report

7.7 Quarterly Billing Report

The Quarterly Billing report contains the employee ID, name, and AP (approval pending) status date for each member during the year in the selected district, broken down by flotilla. All active status members will be billed when a quarterly billing report is generated. Only users who have the billing role can run this report.

To run this report, perform the following steps:

1. In the **Reports** menu, click **Quarterly Billing**.

The Quarterly Billing Report Parameters screen appears, similar to the following:

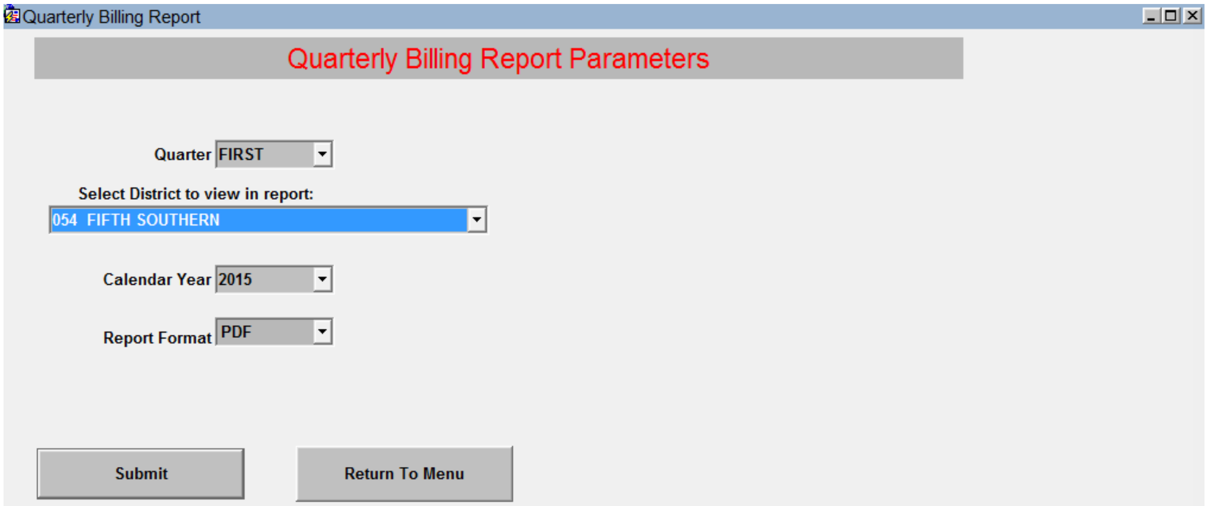


Figure 7-15 Quarterly Billing Report Parameters

2. From the appropriate list boxes, select the `{quarter}`, the `{district}`, and the `{calendar year}` to be covered by the report.
3. In the **Report Format** list box, choose the `{desired format}` (**CSV** or **PDF**), and then click **Submit**.

   A Quarterly Billing Report for the {specified quarter and year}*, similar to the following (shown in PDF format), opens in a separate browser window:*


UNITED STATES COAST GUARD AUXILIARY

New Enrollees

FIRST 2015

District 113

Unit Number	Emp Id	Name	AP Status Date	Owes Annual
1130107	[illegible]	[illegible]	02-JAN-15	NO
1130107	[illegible]	[illegible]	02-JAN-15	NO

Flotilla 07 added 2 new member(s)

Division 11301 added 2 new member(s)

Figure 7-16 Quarterly Billing Report

7.8 Member Anniversary Status

The **Member Anniversary Status** feature allows users to generate a report showing which unit members have an Auxiliary anniversary for a user-specified date. To run this report, perform the following steps:

1. In the **Reports** menu, click **Member Anniversary Status**.

   The Member Anniversary Status Report Parameters screen appears, similar to the following:

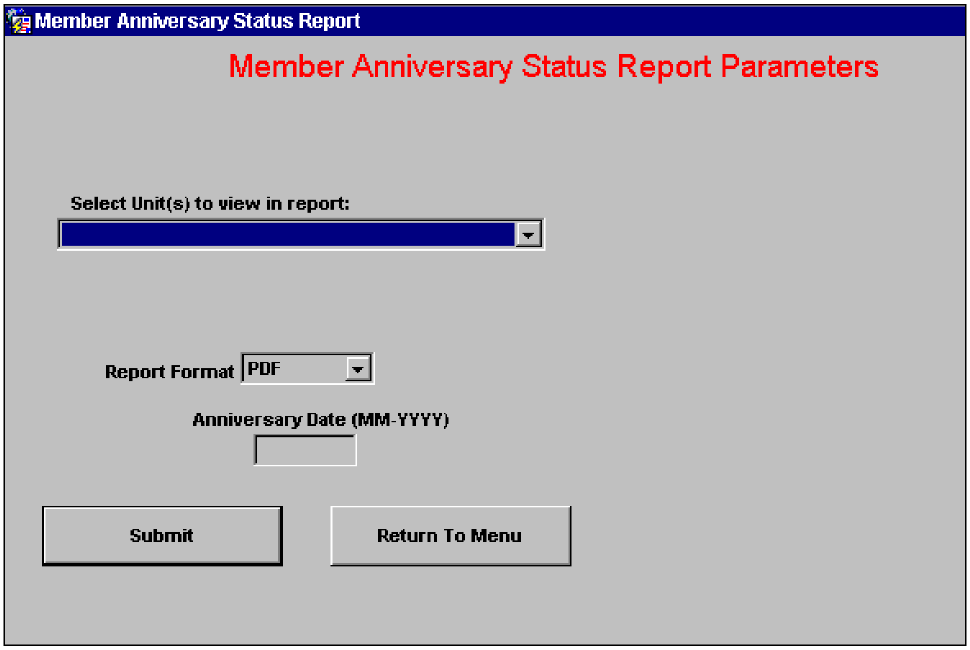
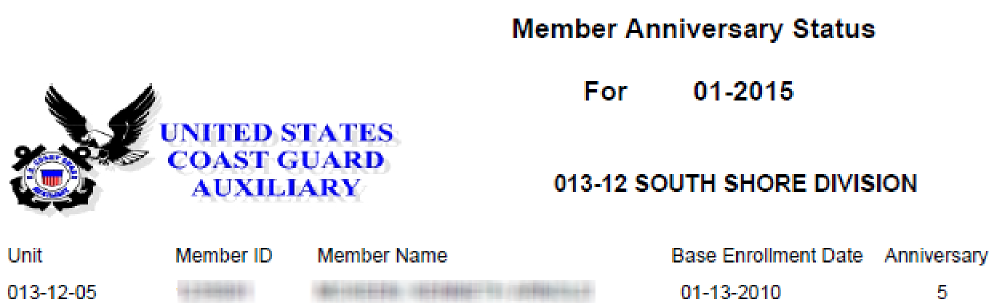


Figure 7-17 Member Anniversary Status Report Parameters Screen

2. Select the *{unit}* to be viewed using the list box, choose the *{desired format}* (**CSV** or **PDF**), enter the *{anniversary date}*, and then click **Submit**.

   The Member Anniversary Status screen, similar to the following (shown in PDF format), opens in a separate browser window:



Member Anniversary Status

For 01-2015

UNITED STATES COAST GUARD AUXILIARY

013-12 SOUTH SHORE DIVISION

Unit	Member ID	Member Name	Base Enrollment Date	Anniversary
013-12-05	[illegible]	[illegible]	01-13-2010	5

Figure 7-18 Member Anniversary Status Screen

7.9 Log Activity Summary

The **Log Activity Summary** feature allows users to run a Log Activity Summary report for user-specified time frames. To run this report, perform the following steps:

1. In the **Reports** menu, click **Log Activity Summary.**

   The Log Activity Summary Report Parameters screen appears, similar to the following:

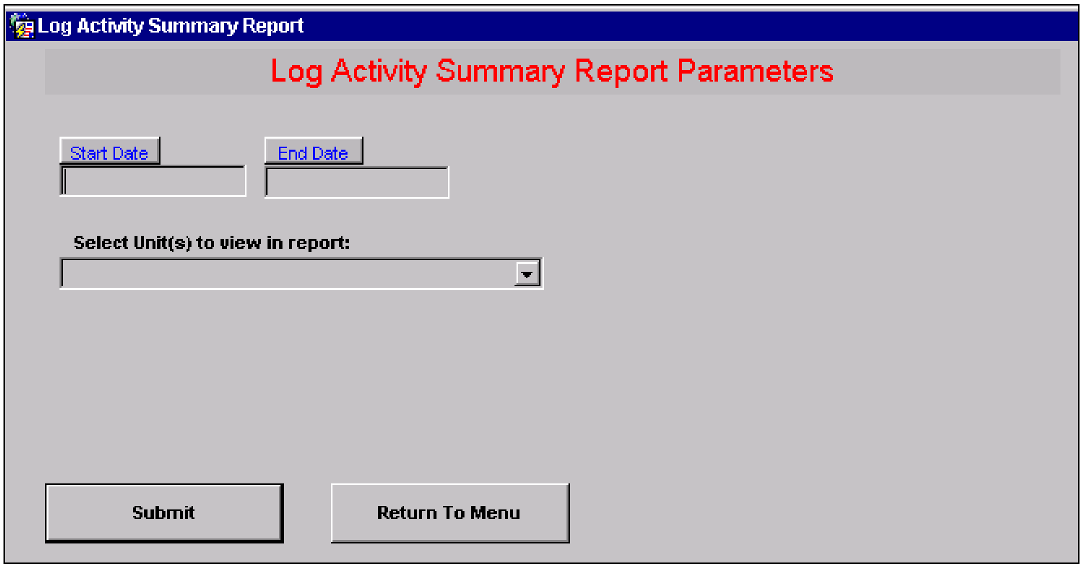


Figure 7-19 Log Activity Summary Report Parameters Screen

2. Enter the `{start date}` and `{end date}` desired, select the `{unit}` to be viewed using the list box, and then click **Submit**.

The Log Activity Summary screen, similar to the following, opens in a separate browser window:

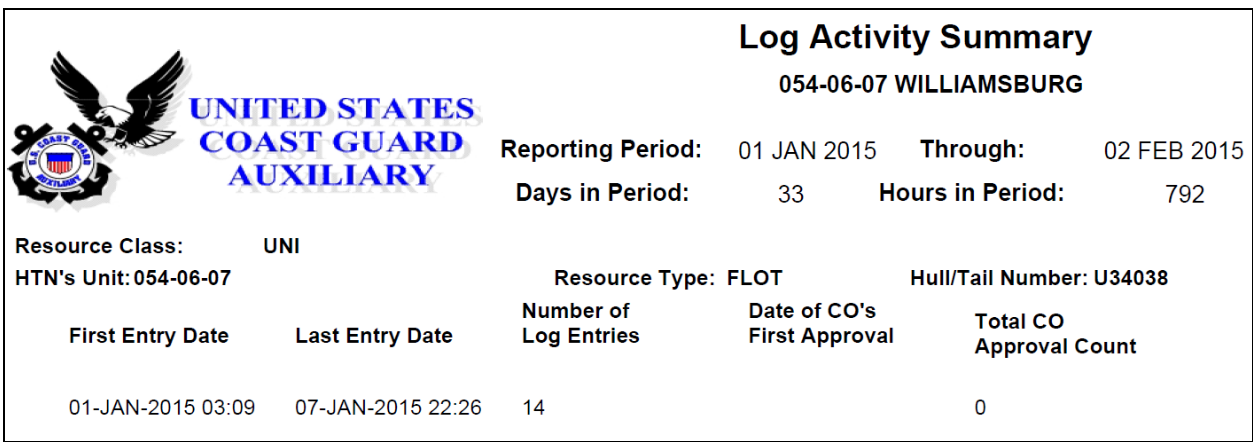


Figure 7-20 Log Activity Summary Screen

7.10 Officer Directory

Use the **Officer Directory** to retrieve information on the officers and the offices at any unit in the organization. The report can be run from the division level down to any particular unit. The following steps describe how to run the report:

1. In the **Reports** menu, click **Officer Directory**.

The Officer Directory Report Parameters screen appears:

Figure 7-21 Officer Directory Report Parameters Screen

2. From the list box, select the `{unit}` on which the report is being run, and then click **Submit**.

    The Officer Directory report, similar to the following, opens in a separate browser window:

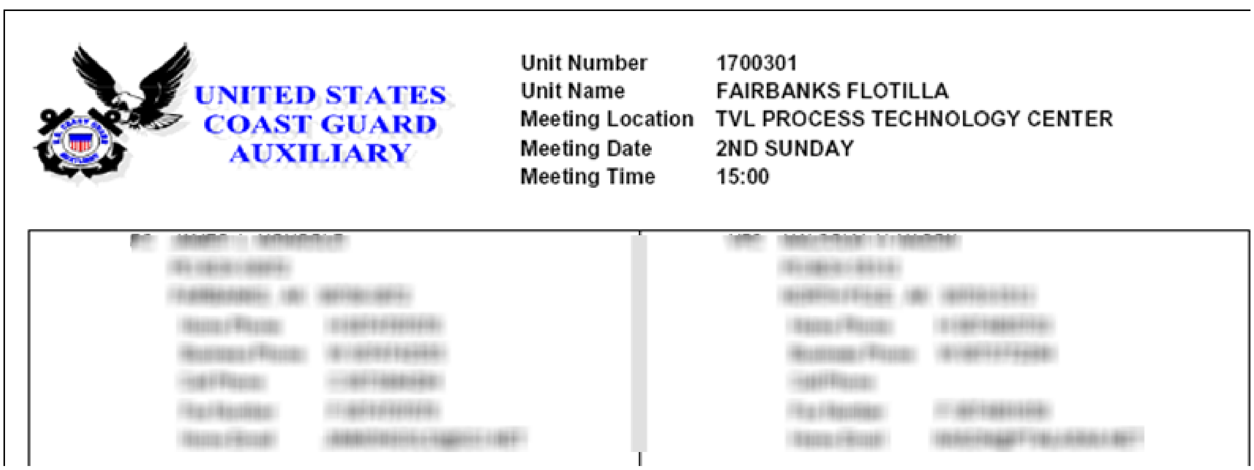


Figure 7-22 Officer Directory Report

7.11 Patriot Readiness

Run a Patriot Readiness report to retrieve a list of members available for duty at a particular unit or State and which days of the week they are available. To run a Patriot Readiness report, perform the following steps:

1. In the **Reports** menu, click **Patriot Readiness**.

    The Patriot Readiness report parameters screen appears, similar to the following:

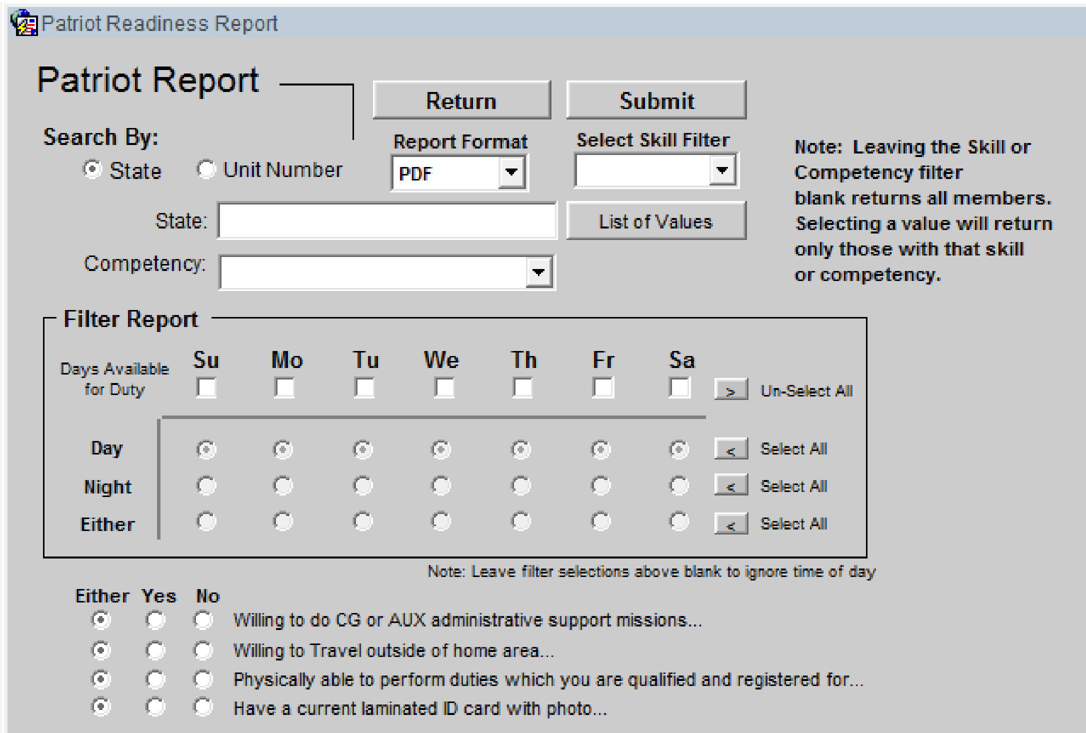
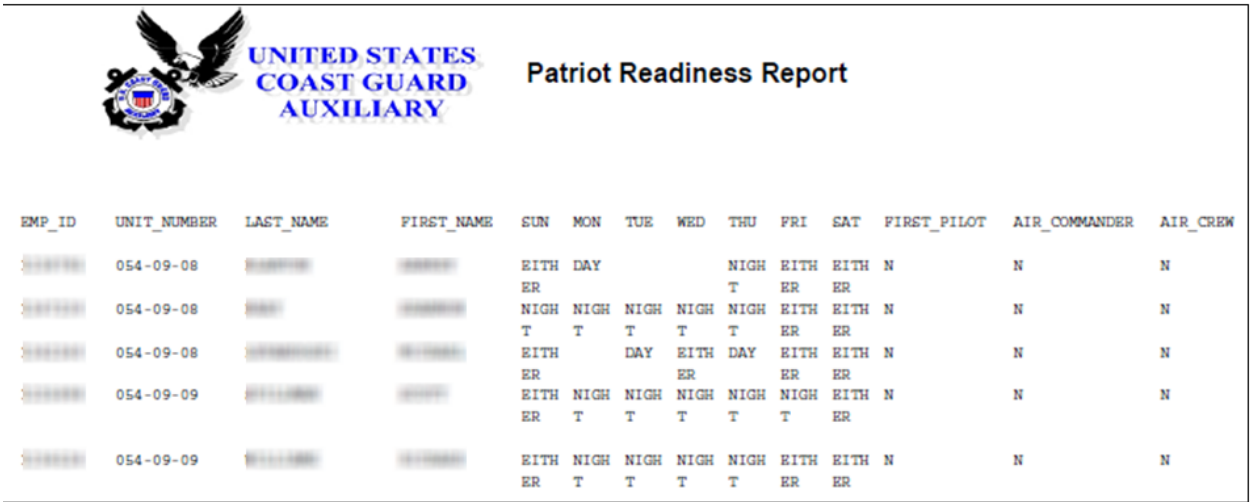


Figure 7-23 Patriot Readiness Report Parameters

2. First, choose either **State** or **Unit Number** to filter the report. Use the **List of Values** to enter either the `{State}` or the `{unit number}`.
3. Enter the `{competency}` by using the list box.
4. Choose the `{desired report format}` (**CSV** or **PDF**).
5. To filter the report by which `{day of the week}` the members are available, select the `{days of the week}`, or else leave this section blank.
6. To filter the report by `{skill code}`, select a `{skill code}` from the **Select Skill Filter** list box at the top right of the screen. Leave the box blank to see members regardless of skill code.
7. To further refine the report, indicate **Yes** or **No** to the preferences and criteria located below the calendar.
8. Click **Submit**.

    A Patriot Readiness report, similar to the following (shown in PDF format), opens in a separate browser window:



EMP_ID	UNIT_NUMBER	LAST_NAME	FIRST_NAME	SUN	MON	TUE	WED	THU	FRI	SAT	FIRST_PILOT	AIR_COMMANDER	AIR_CREW
[illegible]	054-09-08	[illegible]	[illegible]	EITHER	DAY			NIGHT	EITHER	EITHER	N	N	N
[illegible]	054-09-08	[illegible]	[illegible]	NIGHT	NIGHT	NIGHT	NIGHT	NIGHT	EITHER	EITHER	N	N	N
[illegible]	054-09-08	[illegible]	[illegible]	EITHER		DAY	EITHER	DAY	EITHER	EITHER	N	N	N
[illegible]	054-09-09	[illegible]	[illegible]	EITHER	NIGHT	NIGHT	NIGHT	NIGHT	NIGHT	EITHER	N	N	N
[illegible]	054-09-09	[illegible]	[illegible]	EITHER	NIGHT	NIGHT	NIGHT	NIGHT	EITHER	EITHER	N	N	N

Figure 7-24 Patriot Readiness Report Snippet

7.12 Emergency Contact Information

The Emergency Contact Information report displays contact information needed in time of emergency, including member name, employee ID number, emergency contact names, telephone numbers, and so forth. To generate this report, follow these steps:

1. In the **Reports** menu, click **Emergency Contact Info**.

   The Emergency Contact Information parameters screen appears, similar to the following:

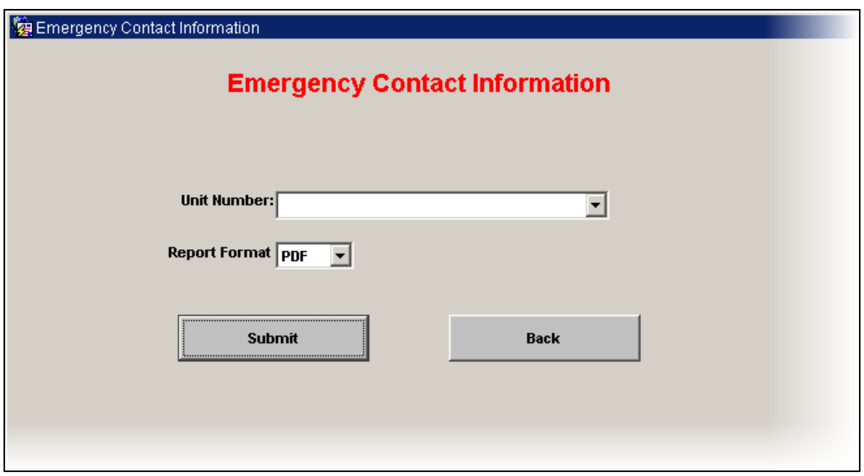


Figure 7-25 Emergency Contact Information

2. Using the **Unit Number** list box, select the `{desired unit number}`.

   *The `{unit number}` appears in the **Unit Number** field.*

3. In the **Report Format** list box, select either **PDF** or **CSV**.

   The `{selected format}` *appears in the **Report Format** field.*

4. Click **Submit**.

The Emergency Contact Information report, similar to the following (shown in PDF format), opens in a separate browser window:

Figure 7-26 Emergency Contact Information Report Snippet

7.13 Awards

The **Awards** feature allows users to view a specific member's awards or view which members have received a certain award. To view an Awards report, perform the following steps:

1. In the **Reports** menu, click **Awards**.

   The Awards report parameters screen appears, similar to the following:

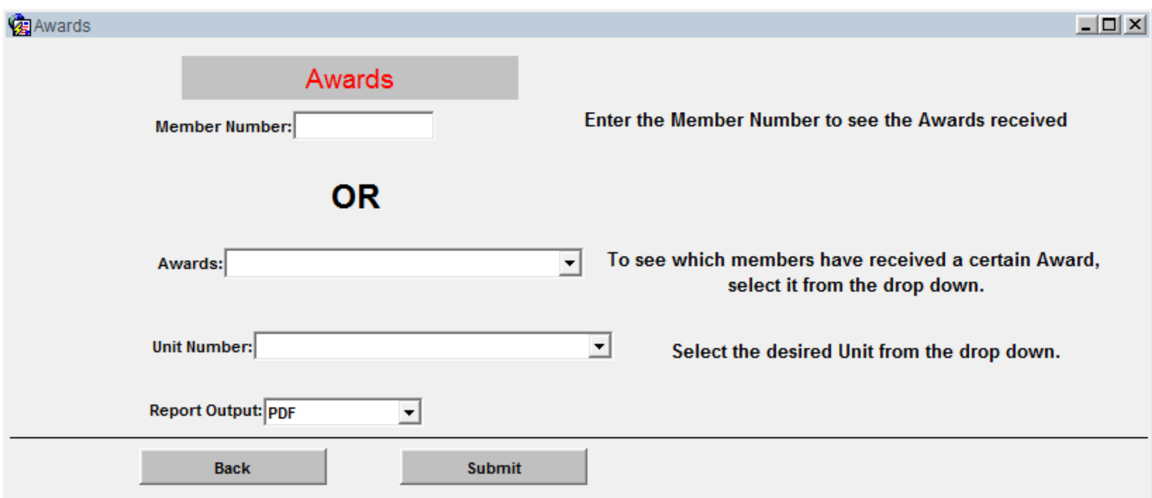


Figure 7-27 Awards Report Parameters

2. Either enter a specific *{member number}* or select an *{award}* from the **Awards** list box.
3. Select the *{appropriate unit}* from the **Unit Number** list box, choose the *{desired report format}* (**PDF** or **CSV**), and then click **Submit**.

   The Awards report, similar to the following (shown in PDF format), opens in a separate browser window:

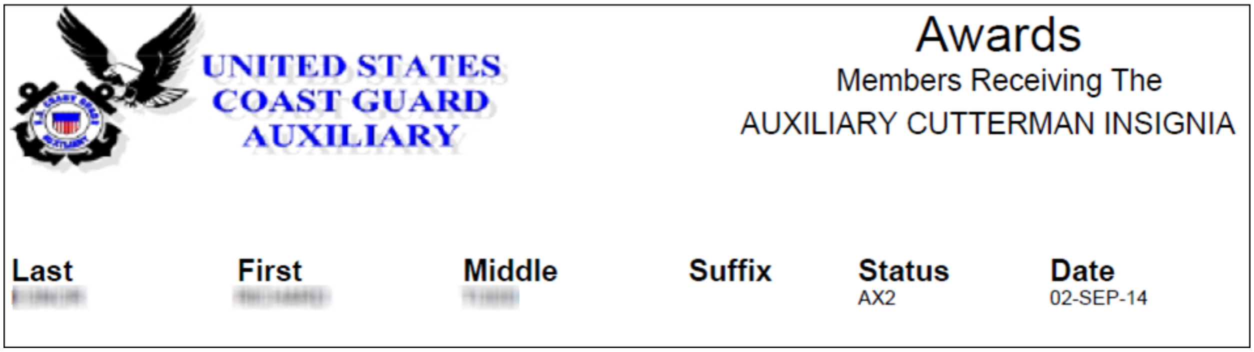


Figure 7-28 Awards Report

7.14 Annual Member Letter

The Annual Member report is generated in the form of a system-generated letter to be provided annually to members of the selected unit. It provides AUXDATA information concerning the member, including contact information, qualifications, awards, and mission/activity hours. It may be generated for an individual member or, in 20-member groupings, for a selected unit. To run this report, perform the following steps:

1. In the **Reports** menu, click **Annual Member Letter**.

NOTE: *This button is visible only to users logged on at the division or flotilla levels.*

The Annual Member Report parameters screen appears, similar to the following:

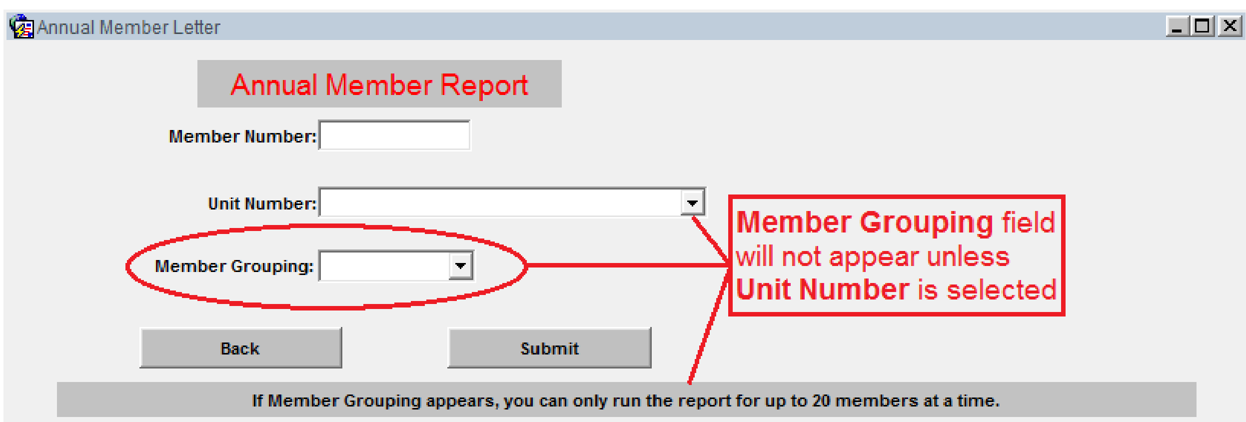


Figure 7-29 Annual Member Report Parameter Screen

NOTE: *The **Member Grouping** field does not appear on the parameters screen unless a unit number is selected (to run the report for a unit).*

2. If the report is for one member, enter the *{member number}* in the **Member Number** field.
3. If the report will cover an entire unit, use the **Unit Number** list box to select the *{unit number}*.

   If a {unit number} *is selected, a **Member Grouping** field appears (as shown in [Figure 7-29](#)).*

4. If the **Member Grouping** field is visible, use its list box to select the *{desired 20-member grouping}*.

5. Click **Submit** to generate the report.

   The report appears in PDF format, similar to [Figure 7-30](#), in a separate browser window. A report (letter) is generated for the {indicated member or for all members in the selected 20-person grouping}.

Annual Member Summary & Status Report **REPORT PERIOD ENDING:** **31-DEC-14**

Member No. 013-04-03 [illegible]

[illegible]

Cell: [illegible]
Home: [illegible]
Email: [illegible]

Base Enrollment Date: 08/14/2006 **Flotilla Enrollment Date:** 08/14/2006 **Status:** BQ 10/06

Current Offices Held:

Qualifications:

Awards Received:

AUXILIARY EXAMINER PROGRAM RIBBON	1	AUXILIARY MEMBERSHIP SERVICE AWARD	1
AUXILIARY OPERATIONS PROGRAM RIBBON	1	AUXILIARY VE/MDV SERVICE AWARD	1
CG MERITORIOUS TEAM COMMENDATION	1	MARINE SAFETY TRAINING RIBBON	1
SUSTAINED AUXILIARY SERVICE AWARD	1	AUXILIARY INSTRUCTOR PROGRAM RIBBON	2
AUXILIARY PE SERVICE AWARD	2	CG UNIT COMMENDATION	3

ICS / IS Courses: ICS100 ICS200 ICS210 ICS700 ICS800

Section 2 End of the Year Cumulative Activity Summary **TOTAL MISSIONS # TOTAL HOURS**

MISSION	#	HOURS	MISSION

Figure 7-30 Annual Member Letter Report

NOTE: *To run the report for additional 20-member groupings, repeat Steps 4 and 5 until all desired reports (letters) are generated. The 20-member limitation is necessary to prevent an overload of system resources.*

7.15 Underway Resource Hours

The **Underway Resource Hours** feature allows users to run an Underway Resource Hours report for a user-specified time frame. To run this report, perform the following steps:

1. In the **Reports** menu, click **Underway Resource Hours**.

   The Underway Resource Hours Report Parameters screen appears, similar to the following:

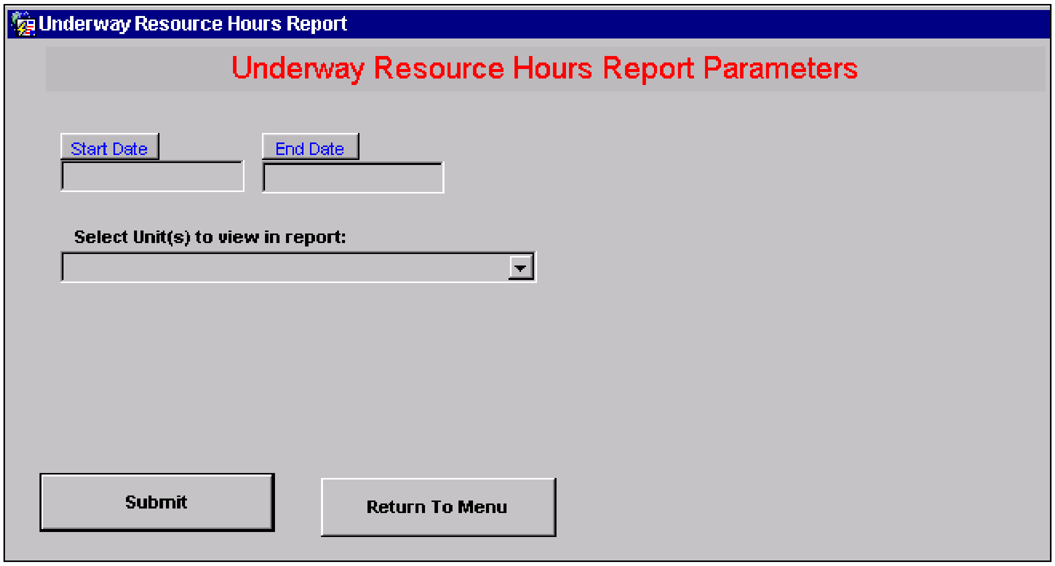
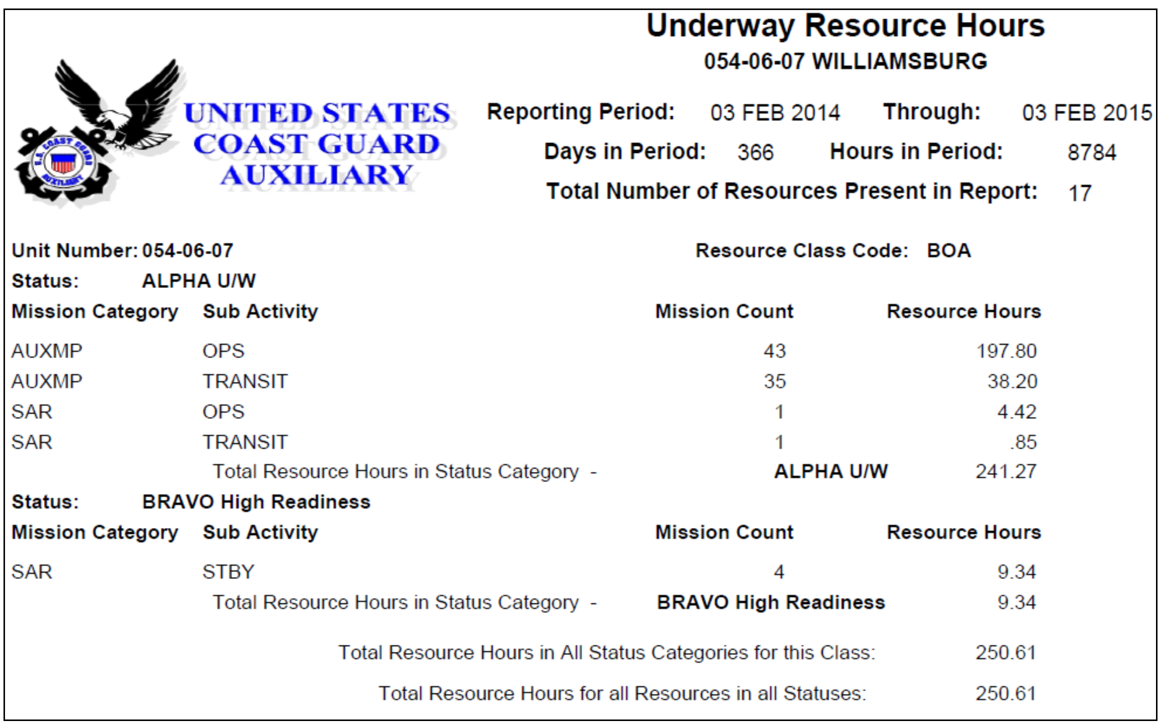


Figure 7-31 Underway Resource Hours Report Parameters Screen

2. Enter the `{start date}` and `{end date}` desired, select the `{unit}` to be viewed using the list box, and then click **Submit**.

   The Underway Resource Hours screen, similar to the following, opens in a separate browser window:



Underway Resource Hours

054-06-07 WILLIAMSBURG

UNITED STATES COAST GUARD AUXILIARY

Reporting Period: 03 FEB 2014 **Through:** 03 FEB 2015

Days in Period: 366 **Hours in Period:** 8784

Total Number of Resources Present in Report: 17

Unit Number: 054-06-07 **Resource Class Code:** BOA

Status: ALPHA U/W

Mission Category	Sub Activity	Mission Count	Resource Hours
AUXMP	OPS	43	197.80
AUXMP	TRANSIT	35	38.20
SAR	OPS	1	4.42
SAR	TRANSIT	1	.85
	Total Resource Hours in Status Category -	**ALPHA U/W**	241.27

Status: BRAVO High Readiness

Mission Category	Sub Activity	Mission Count	Resource Hours
SAR	STBY	4	9.34
	Total Resource Hours in Status Category -	**BRAVO High Readiness**	9.34

Total Resource Hours in All Status Categories for this Class: 250.61

Total Resource Hours for all Resources in all Statuses: 250.61

Figure 7-32 Underway Resource Hours Screen

7.16 Days Underway

The **Days Underway** feature allows users to run a report on the days the vessel is underway for a user-specified time frame. To run a Days Underway report, perform the following steps:

1. In the **Reports** menu, click **Days Underway**.

   The Days Underway Report Parameters screen appears, similar to the following:

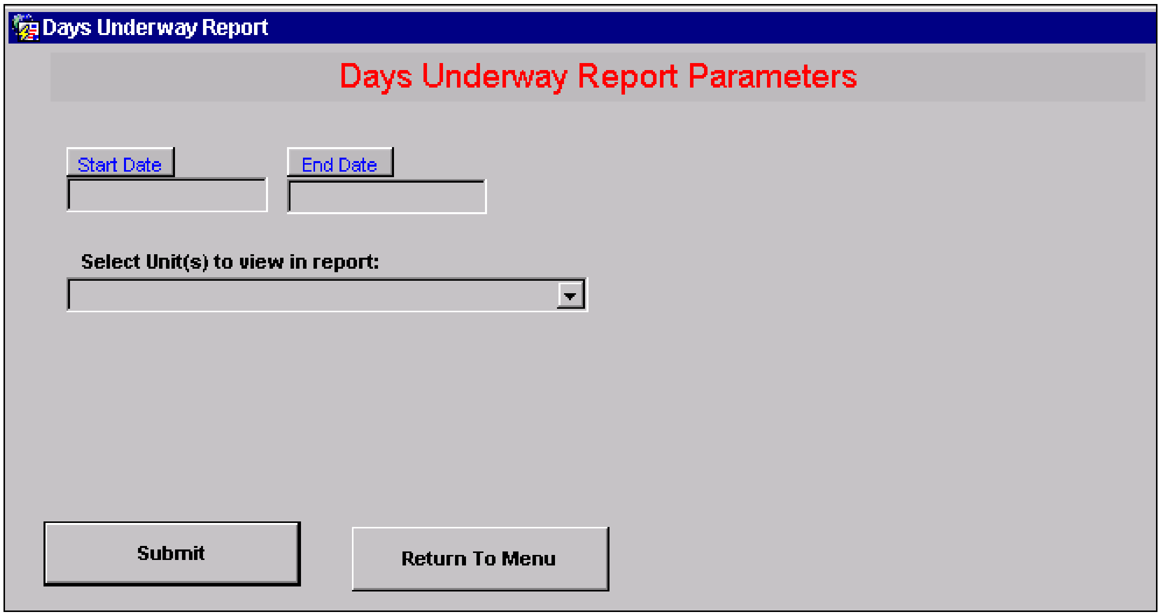


Figure 7-33 Days Underway Report Parameters Screen

2. Enter the `{start date}` and `{end date}` desired, select the `{unit}` to be viewed using the list box, and then click **Submit**.

   The Days Underway screen, similar to the following, opens in a separate browser window:

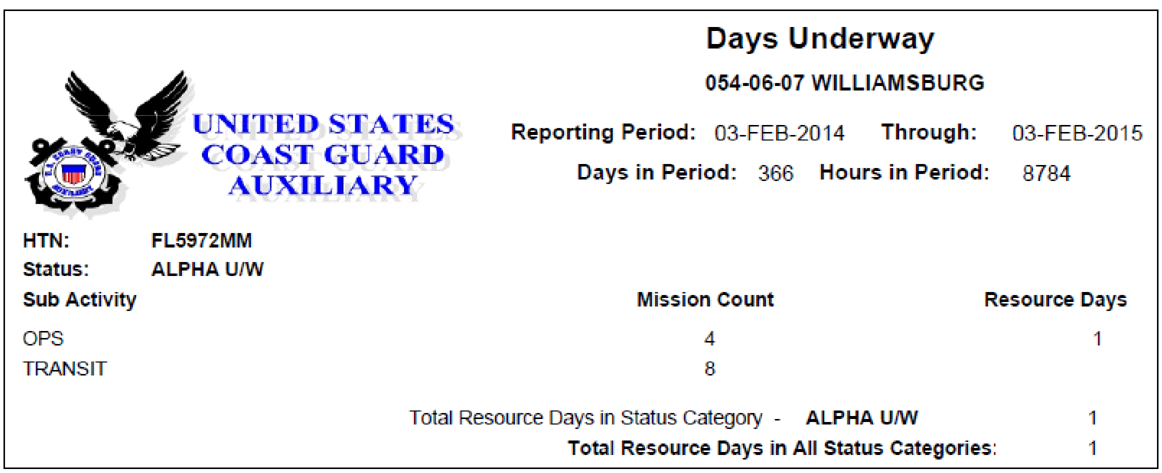


Figure 7-34 Days Underway Screen

7.17 Mission Detail

Run a Mission Detail report to retrieve mission details, such as mission category, the name of the individual who performed the mission, the duration of the mission, and so forth, for the selected period and unit(s). To run this report, perform the following steps:

1. In the **Reports** menu, click **Mission Detail**.

The Mission Detail Report Parameters screen appears, similar to the following:

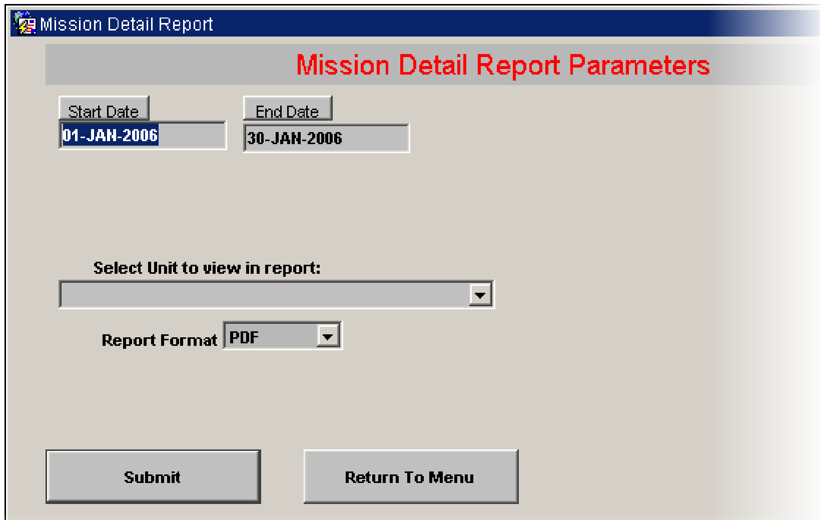


Figure 7-35 Mission Detail Report Parameters Screen

2. To define a reporting period, enter a `{start date}` and `{end date}`.
3. Select the `{unit}` to include in the report.
4. Select the `{desired report format}` (**CSV** or **PDF**).
5. Click **Submit**.

   A Mission Detail report, similar to the following (shown in PDF format), opens in a separate browser window:

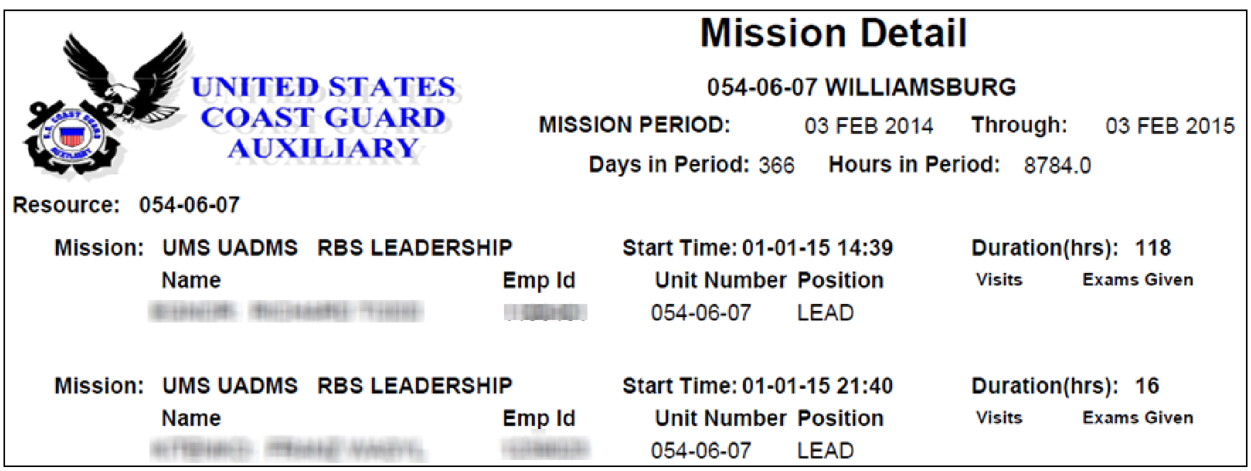


Figure 7-36 Mission Detail Report

7.18 Underway Crew

The **Underway Crew** feature allows users to run a report on underway crew for a user-specified time frame. To run an Underway Crew report, perform the following steps:

1. In the **Reports** menu, click **Underway Crew**.

   The Underway Crew Report Parameters screen appears, similar to the following:

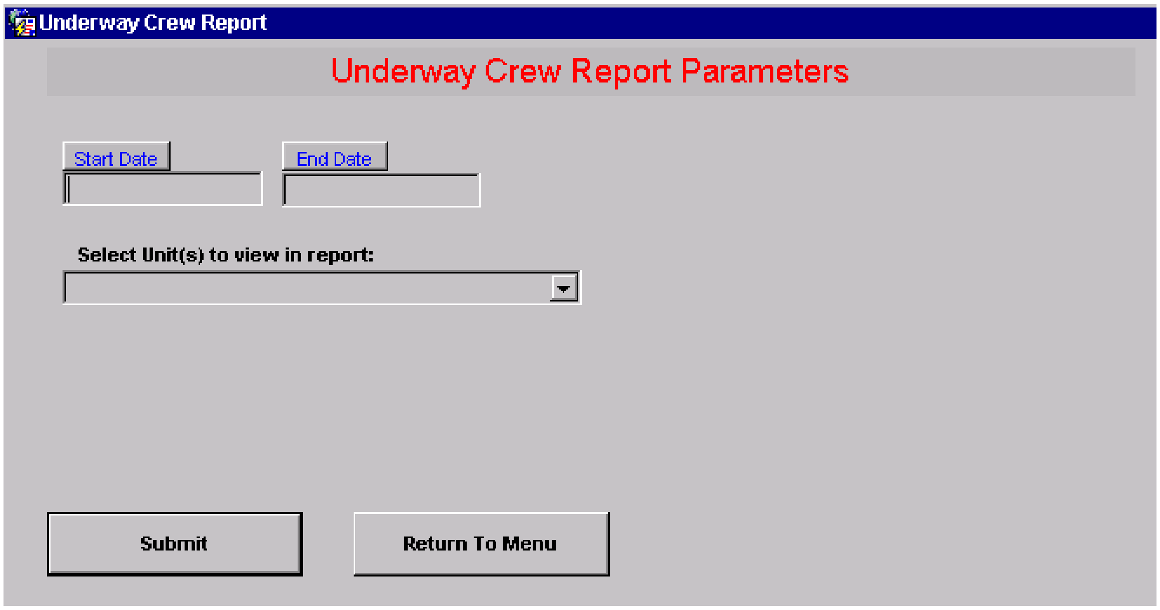
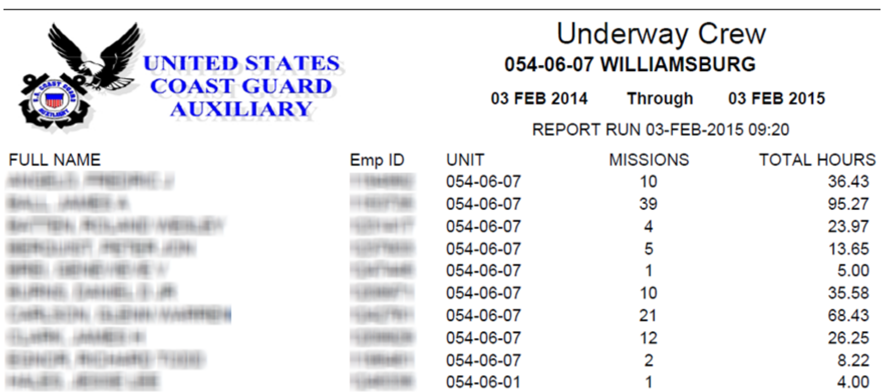


Figure 7-37 Underway Crew Report Parameters Screen

2. Enter the `{start date}` and `{end date}` desired, select the `{unit}` to be viewed using the list box, and then click **Submit**.

The Underway Crew screen, similar to the following, opens in a separate browser window:


UNITED STATES COAST GUARD AUXILIARY

Underway Crew
054-06-07 WILLIAMSBURG
03 FEB 2014 Through 03 FEB 2015
REPORT RUN 03-FEB-2015 09:20

FULL NAME	Emp ID	UNIT	MISSIONS	TOTAL HOURS
[illegible]	[illegible]	054-06-07	10	36.43
[illegible]	[illegible]	054-06-07	39	95.27
[illegible]	[illegible]	054-06-07	4	23.97
[illegible]	[illegible]	054-06-07	5	13.65
[illegible]	[illegible]	054-06-07	1	5.00
[illegible]	[illegible]	054-06-07	10	35.58
[illegible]	[illegible]	054-06-07	21	68.43
[illegible]	[illegible]	054-06-07	12	26.25
[illegible]	[illegible]	054-06-07	2	8.22
[illegible]	[illegible]	054-06-01	1	4.00

Figure 7-38 Underway Crew Screen

7.19 Address and Flotilla Data

Run an Address and Flotilla Data report to retrieve address, phone, and member status information on members at a flotilla. Users have the option to filter the report to view only active, inactive, or all members. To run an Address and Flotilla Data report, perform the following steps:

1. In the **Reports** menu, click **Address and Flotilla Data**.

The Address and Flotilla Data Report Parameters screen appears, similar to the following:

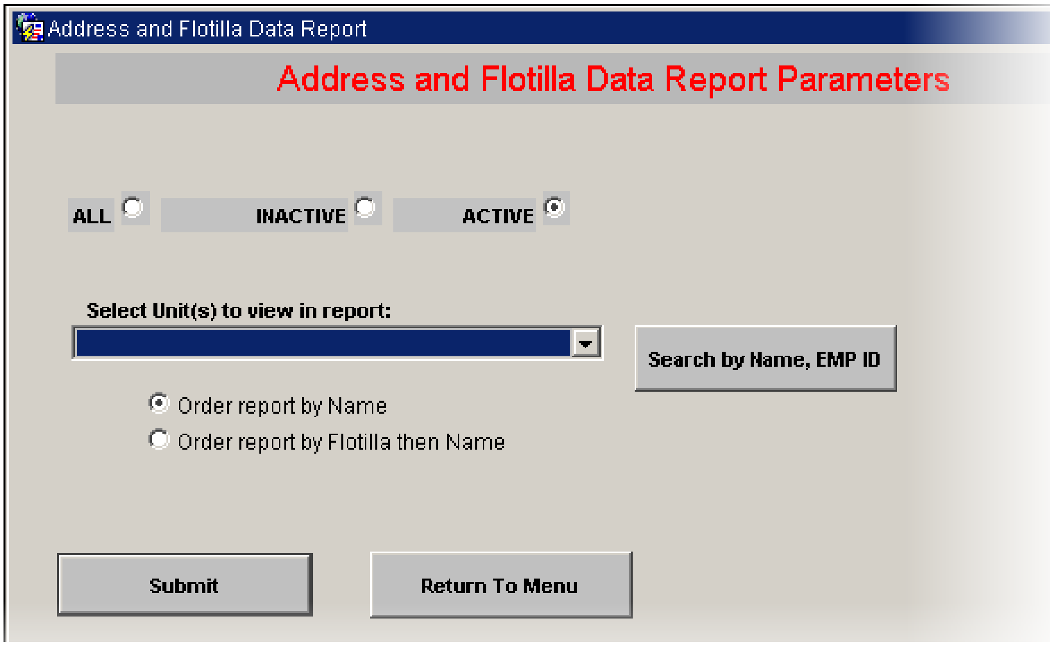


Figure 7-39 Address and Flotilla Data Report Parameters Screen

2. Click only one of the three option buttons to include in the report **All** members, **Inactive** members, or **Active** members.
3. Select the *{unit}* to be covered by the report from the list box.
4. To search for a particular member, click **Search by Name, EMP ID**, and use the resulting search screen to find the *{desired name or EMP ID}*.
5. Click the appropriate option button to sort the report by either:
   - Name, or
   - Flotilla, then by name (within flotilla).
6. Click **Submit**.

The Address and Flotilla Data screen, similar to the following, opens in a separate browser window:

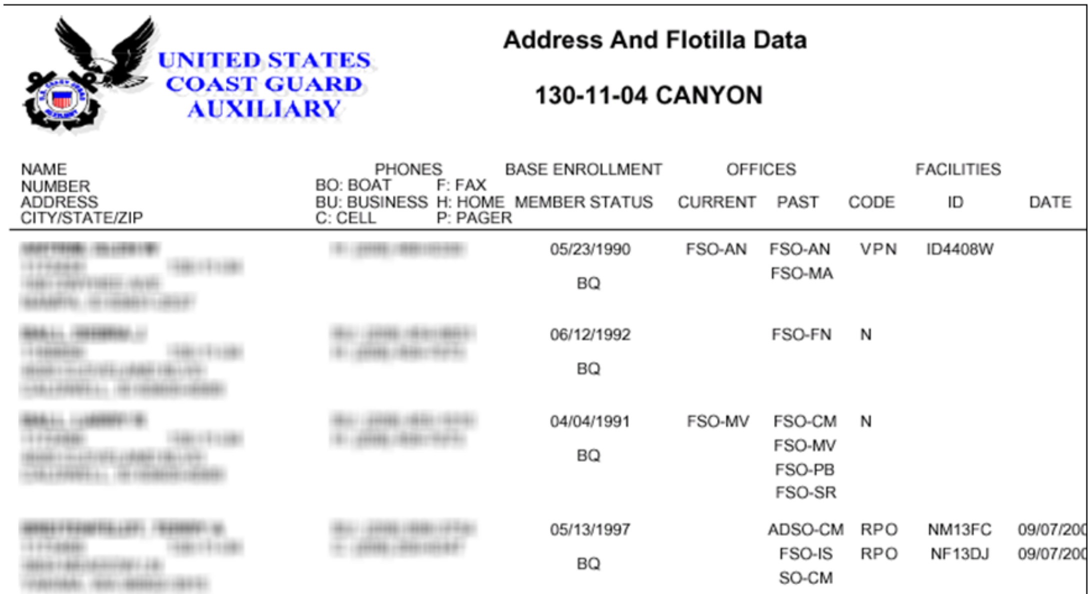


Figure 7-40 Address and Flotilla Data Screen

7.20 Unit Summary Data

The **Unit Summary Data** feature allows users to retrieve unit summary data, such as member data, missions, training, activities, and so forth. To run this report, perform the following steps:

1. In the **Reports** menu, click **Unit Summary Data**.

   The Unit Summary Data Report Parameters screen appears, similar to the following:

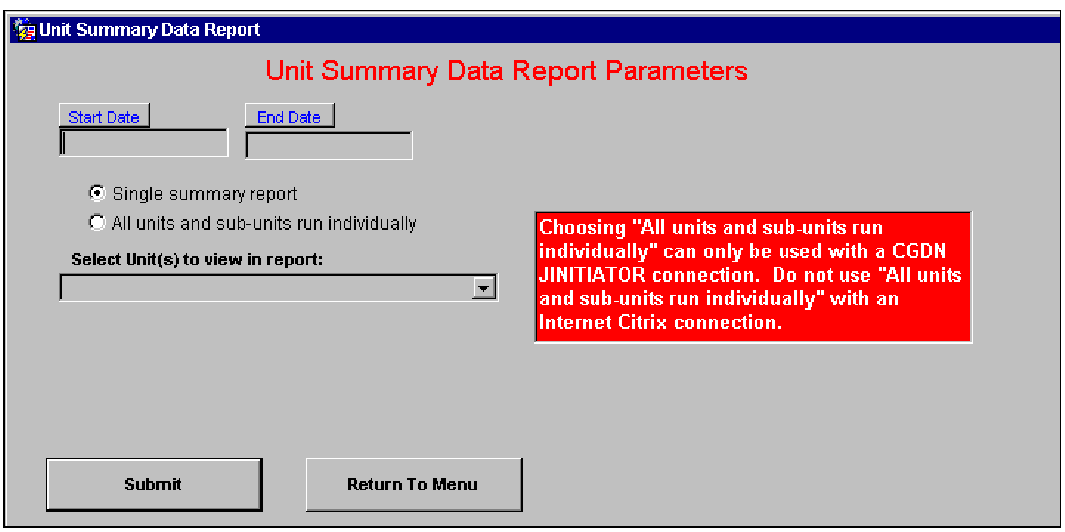
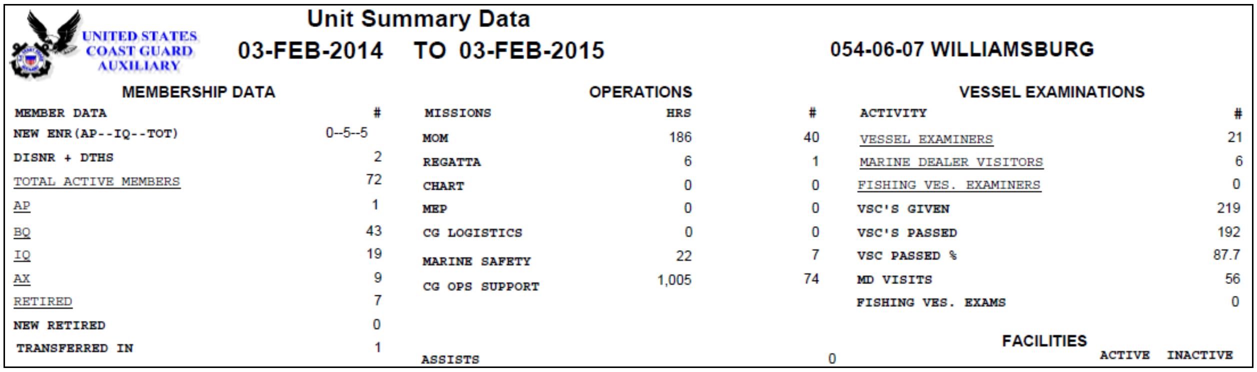


Figure 7-41 Unit Summary Data Report Parameters Screen

2. Enter a `{start date}` and `{end date}` to define the reporting period.

3. Select the *{desired reporting option}*—**Single summary report** or **All units and sub-units run individually**.
4. Select from the list box the *{unit(s)}* to include in the report, and then click **Submit**.

   The Unit Summary Data screen, similar to the following, opens in a separate browser window:



UNITED STATES COAST GUARD AUXILIARY

Unit Summary Data

03-FEB-2014 TO 03-FEB-2015

054-06-07 WILLIAMSBURG

MEMBERSHIP DATA	
MEMBER DATA	#
NEW ENR(AP--IQ--TOT)	0--5--5
DISNR + DTHS	2
TOTAL ACTIVE MEMBERS	72
AP	1
BQ	43
IQ	19
AX	9
RETIRED	7
NEW RETIRED	0
TRANSFERRED IN	1

OPERATIONS		
MISSIONS	HRS	#
MOM	186	40
REGATTA	6	1
CHART	0	0
MEP	0	0
CG LOGISTICS	0	0
MARINE SAFETY	22	7
CG OPS SUPPORT	1,005	74
ASSISTS		0

VESSEL EXAMINATIONS	
ACTIVITY	#
VESSEL EXAMINERS	21
MARINE DEALER VISITORS	6
FISHING VES. EXAMINERS	0
VSC'S GIVEN	219
VSC'S PASSED	192
VSC PASSED %	87.7
MD VISITS	56
FISHING VES. EXAMS	0

FACILITIES

ACTIVE INACTIVE

Figure 7-42 Unit Summary Data Screen

7.21 Activity by State

The **Activity by State** feature allows users to run an Activity by State report for a user-specified time. To run this report, perform the following steps:

1. In the **Reports** menu, click **Activity by State**.

   The Activity by State Report Parameters screen appears, similar to the following:

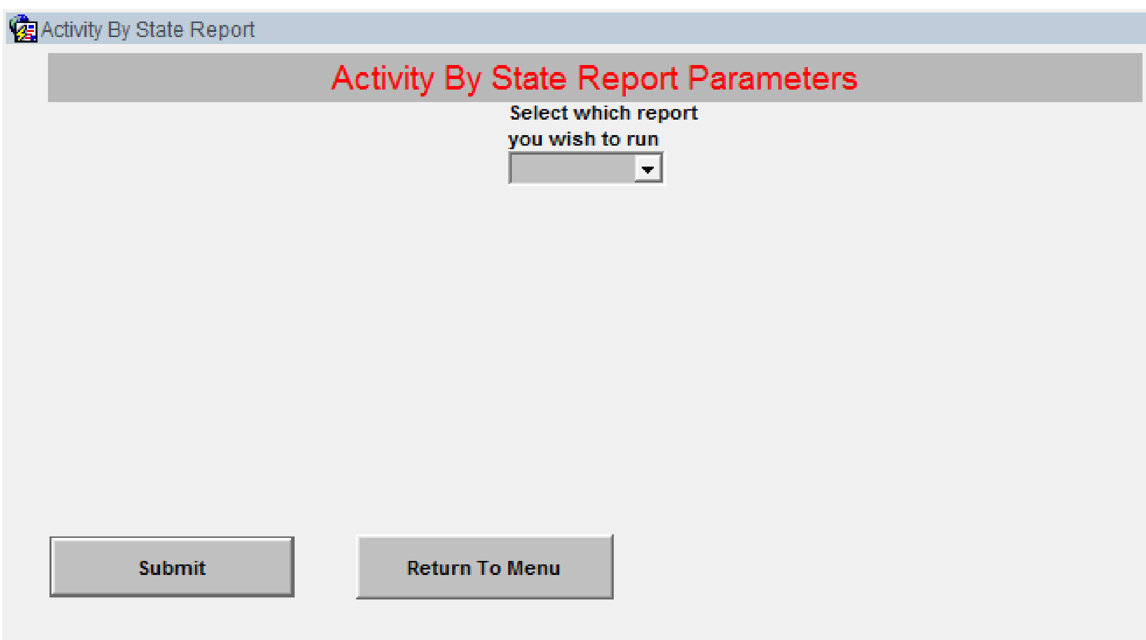


Figure 7-43 Activity by State Report Parameters Screen

2. From the list box, select the *{desired year}*, and then click **Submit**.

The Activity by State screen, similar to the following, opens in a separate browser window:

Activity By State

UNITED STATES COAST GUARD AUXILIARY

FOR PERIOD 01-JAN-14 THROUGH 30-NOV-14

STATE	AUX/FAC IN STATE	TOTAL AUX PATROLS NO. /HOURS	PATROLS ON S/S WATERS NO. /HOURS	NO. PEC ENROLLEES BY TYPE OF COURSE 1-L	MULT-L	ST-CRS	AUXILIARY NO. ASSTS/ PRSNS SAVD	ASSIST DATA PRSNS ASSTD/ VALUE x $1000	VSC GIVEN	CFVE/ UPV GIVEN
AA	1	0	0	0	0	0	0	0	0	0
	0	0	0				0	0		0
AE	9	0	0	0	0	0	0	0	0	0
	0	0	0				0	0		0
AK	402	120	2	0	0	0	6	17	574	57
	32	530	7				2	88		40
AL	282	443	103	0	0	0	13	32	1,612	0
	86	1,526	442				11	78		0
AP	4	0	0	0	0	0	0	0	0	0
	0	0	0				0	0		0

Figure 7-44 Activity by State Screen

7.22 Annual Billing Report

The Annual Billing report contains the unit number, employment ID, and person's name, including an indication of past district commodores (PDCO), for each member enrolling during the year in the selected district, broken down by flotilla. Only users who have the billing role can run this report. All active status members will be billed.

To run this report, perform the following steps:

1. In the **Reports** menu, click **Annual Billing**.

   The Annual Billing Report Parameters screen appears, similar to the following:

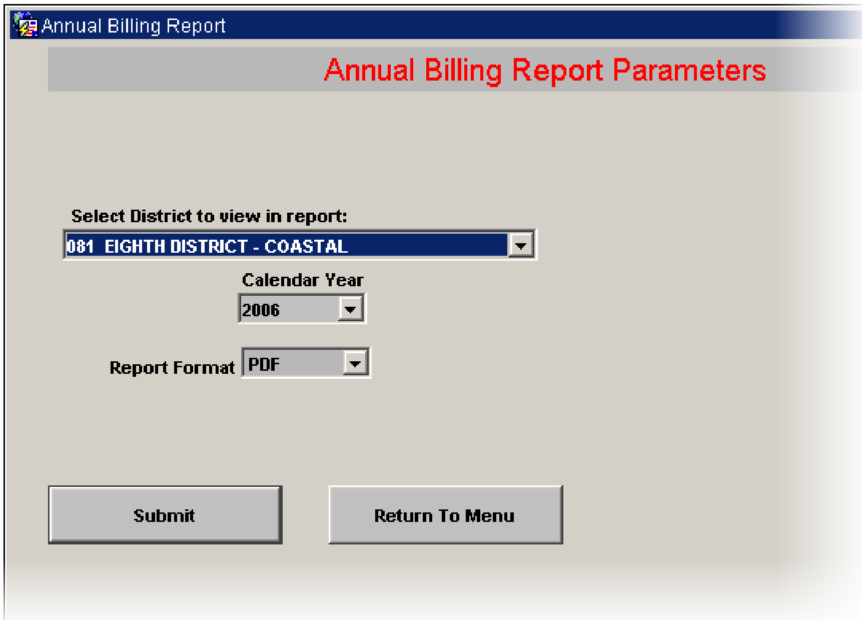


Figure 7-45 Annual Billing Report Parameters Screen

2. From the appropriate list boxes, select the *{district}*, *{calendar year}*, and *{report format}* (**CSV** or **PDF**) to include in the report.
3. Click **Submit**.

   An Annual Billing report for the {specified district and year}*, similar to the following (shown in PDF format), opens in a separate browser window:*

Annual Billing

District 054 2014

Unit Number	Emp Id	Name	Life Mbrship
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	
0540301	1[illegible]	[illegible]	

Figure 7-46 Annual Billing Report

7.23 Election Eligibility

The **Election Eligibility** feature allows users to check the credentials for persons at a flotilla, division, district, or national unit to determine who should be considered for an elected position. To run an Election Eligibility report, perform the following steps:

1. In the **Reports** menu, click **Election Eligibility**.

   The Election Eligibility Report parameters screen appears, similar to the following:

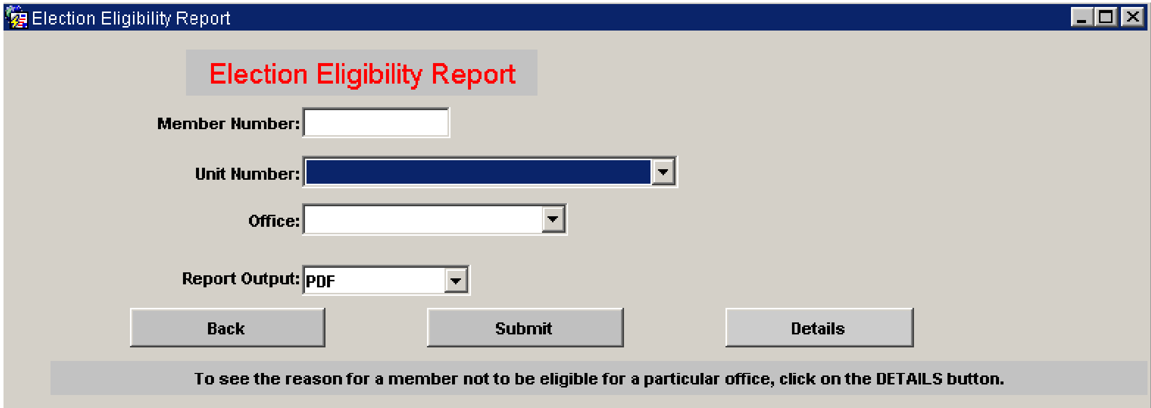


Figure 7-47 Election Eligibility Report Parameters Screen

2. Select the `{desired unit number}` and the `{desired office}` from their list boxes.
3. Select the `{desired report format}` (**PDF** or **CSV**).
4. Click **Submit**.

   The Election Eligibility report, similar to the following (shown in PDF format), opens in a separate browser window:

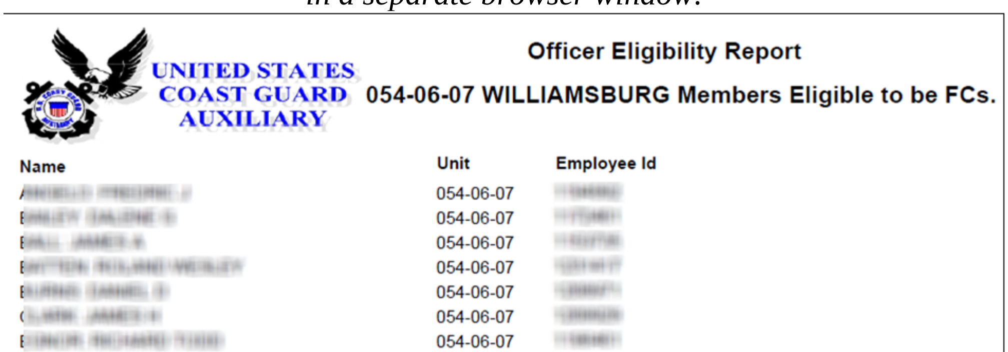
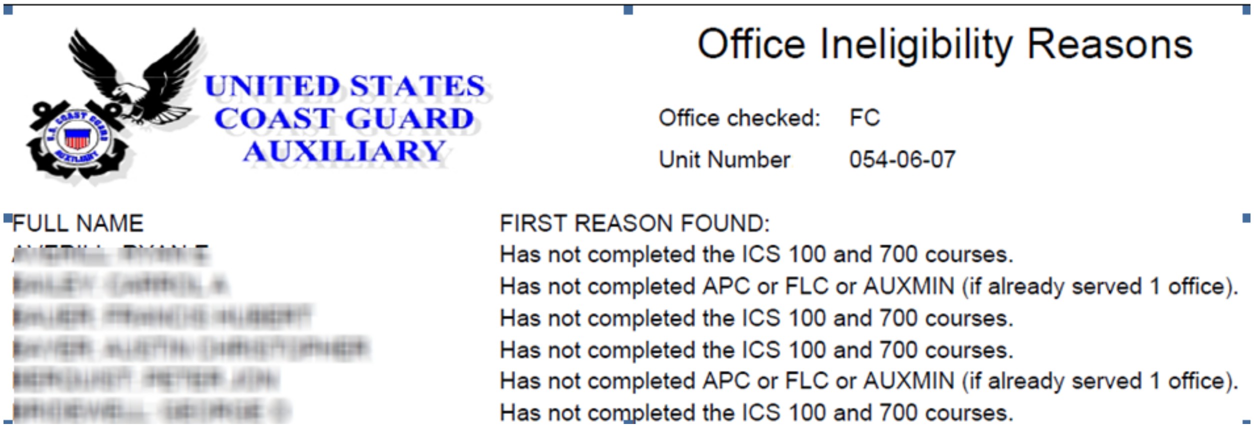


Figure 7-48 Election Eligibility Report

5. To see the reason for a member not being eligible for a particular office, click **Details**.

   The Office Ineligibility Reasons report, similar to the following (shown in PDF format), opens in a separate browser window:



UNITED STATES COAST GUARD AUXILIARY

Office Ineligibility Reasons

Office checked: FC

Unit Number 054-06-07

FULL NAME	FIRST REASON FOUND:
[illegible]	Has not completed the ICS 100 and 700 courses.
[illegible]	Has not completed APC or FLC or AUXMIN (if already served 1 office).
[illegible]	Has not completed the ICS 100 and 700 courses.
[illegible]	Has not completed the ICS 100 and 700 courses.
[illegible]	Has not completed APC or FLC or AUXMIN (if already served 1 office).
[illegible]	Has not completed the ICS 100 and 700 courses.

Figure 7-49 Office Ineligibility Reasons

7.24 AUXOP Progress

The **AUXOP Progress** feature allows users to generate progress reports showing the courses a member has taken/needs to take. To run an AUXOP Progress report, perform the following steps:

1. In the **Reports** menu, click **AUXOP Progress**.

   The AUXOP Progress Report parameters screen appears, similar to the following:

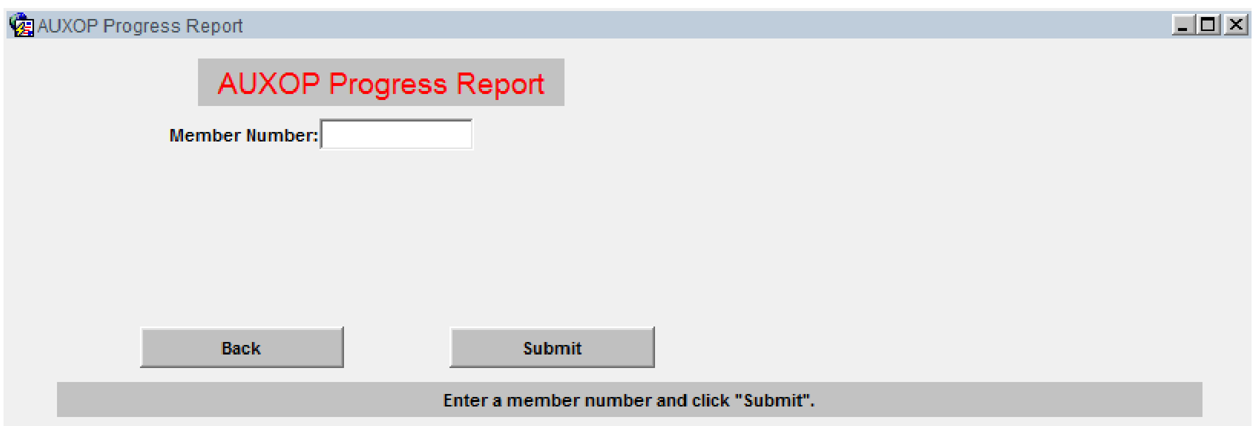


Figure 7-50 AUXOP Progress Report Parameters Screen

2. Enter the `{desired member number}` in the **Member Number** field, and then click **Submit**.

   The AUXOP Progress report, similar to the following, opens in a separate browser window:

AUXOP Progress Report

UNITED STATES COAST GUARD AUXILIARY

013-01-01 BUCKSPORT

2222444 FRAGA, THOMAS J

Status: BASICALLY QUALIFIED

1 Required Core Courses (3 Credits Required)	Credits	Date Completed
WEATHER SPECIALTY (AUXWEA) COURSE	1 credit	
SEAMANSHIP SPECIALTY (AUXSEA) COURSE	1 credit	
COMMUNICATIONS SPECIALTY (AUXCOM) COURSE	1 credit	

2 Required Leaderhip Courses (1 Credit Required)	Credits	Date Completed
FLOTILLA LEADERSHIP COURSE - ONLINE	1 credit	
FLOTILLA LEADERSHIP COURSE - RESIDENTIAL	1 credit	
AUXLAMS A&B - AUXILIARY LEADERSHIP & MGMT RESIDENT COURSE	1 credit	
AUXLAMS A&B - AUXILIARY LEADERSHIP & MGMT ROADSHOW COURSE	1 credit	
AUXILIARY MID-LEVEL OFFICER CRSE - AMLOC-A (DCDR/VCDR/DVC)	1 credit	

Figure 7-51 AUXOP Progress Report

7.25 Admin Reports

Several reports are available to AUXDATA users who have administrative privileges. These reports retrieve and summarize data at the district level and Coast Guard wide, depending on the user's access level. See the sections below for instructions to run the individual Admin reports.

To access the **Admin Reports** menu, perform the following steps:

1. In the AUXDATA main menu, click **REPORTS**.

   *The **Reports** menu appears, displaying the **Admin Reports** button.*

2. Click **Admin Reports**.

   *The **Admin Reports** menu appears, similar to the following:*

Figure 7-52 Admin Reports Menu

3. Choose the `{desired report option}`.

7.25.1 PE Performance Awards Due Report

This report provides a list of Auxiliary personnel who are due for a PE Performance Award, based on earned credits. To run this report, perform the following steps:

1. In the **Admin Reports** menu, click **PE Performance Awards**.

The PE Performance Awards Report parameters screen appears, similar to the following:

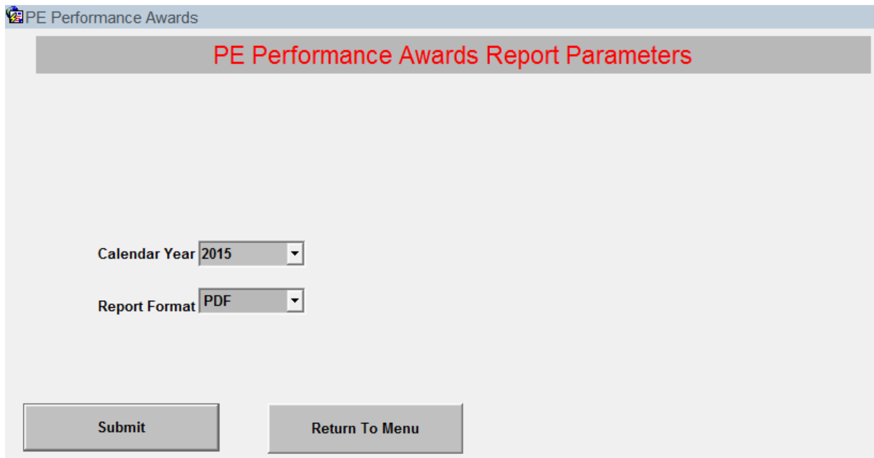
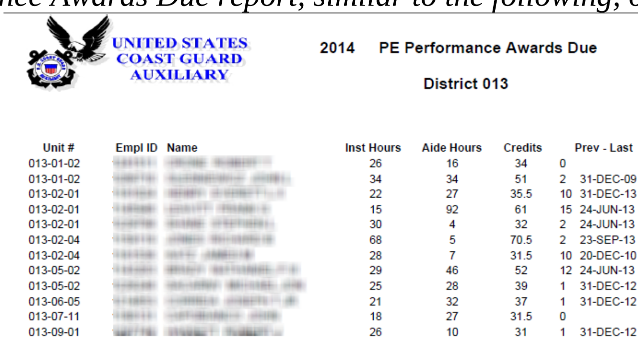


Figure 7-53 PE Performance Awards Report Parameters Screen

2. From the **Calendar Year** list box, select the `{calendar year}` to define the report.
3. Click **Submit**.

The PE Performance Awards Due report, similar to the following, opens in a separate browser window:



2014 PE Performance Awards Due

District 013

Unit #	Empl ID	Name	Inst Hours	Aide Hours	Credits	Prev - Last
013-01-02	[redacted]	[redacted]	26	16	34	0
013-01-02	[redacted]	[redacted]	34	34	51	2 31-DEC-09
013-02-01	[redacted]	[redacted]	22	27	35.5	10 31-DEC-13
013-02-01	[redacted]	[redacted]	15	92	61	15 24-JUN-13
013-02-01	[redacted]	[redacted]	30	4	32	2 24-JUN-13
013-02-04	[redacted]	[redacted]	68	5	70.5	2 23-SEP-13
013-02-04	[redacted]	[redacted]	28	7	31.5	10 20-DEC-10
013-05-02	[redacted]	[redacted]	29	46	52	12 24-JUN-13
013-05-02	[redacted]	[redacted]	25	28	39	1 31-DEC-12
013-06-05	[redacted]	[redacted]	21	32	37	1 31-DEC-12
013-07-11	[redacted]	[redacted]	18	27	31.5	0
013-09-01	[redacted]	[redacted]	26	10	31	1 31-DEC-12

Figure 7-54 PE Performance Awards Due Report

7.25.2 VE/MDV Performance Awards Report

This report lists Auxiliary personnel eligible for a VE/MDV Performance Award, based on earned credits. To run this report, perform the following steps:

1. In the **Admin Reports** menu, click **VE/MDV Performance Awards**.

The VE/MDV Performance Awards Report Parameters screen appears, similar to the following.

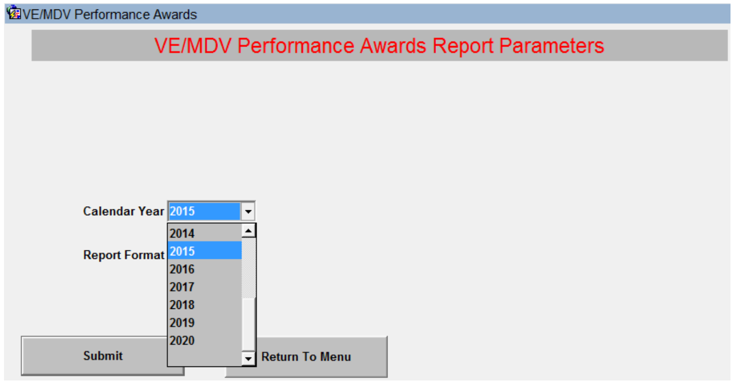
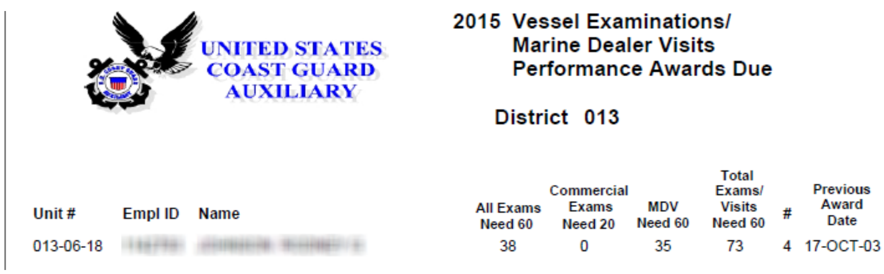


Figure 7-55 VE/MDV Performance Awards Report Parameters Screen

2. From the **Calendar Year** list box, select the `{calendar year}` to define the report.
3. From the **Report Format** list box, select the `{report format}` (**PDF** or **CSV**).
4. Click **Submit**.

   The VE/MDV Performance Awards Due report, similar to the following (shown in PDF format), opens in a separate browser window:



UNITED STATES COAST GUARD AUXILIARY

2015 Vessel Examinations/
Marine Dealer Visits
Performance Awards Due

District 013

Unit #	Empl ID	Name	All Exams Need 60	Commercial Exams Need 20	MDV Need 60	Total Exams/ Visits Need 60	#	Previous Award Date
013-06-18	[illegible]	[illegible]	38	0	35	73	4	17-OCT-03

Figure 7-56 VE/MDV Performance Awards Due Report

7.25.3 Operations Performance Awards Report

This report lists members eligible for the Operations and Performance Award and displays, for each member, cumulative hours in operations supporting the award. To run this report, perform the following steps:

1. In the **Admin Reports** menu, click **Operations Performance Awards**.

   The Operations Performance Awards Report Parameters screen appears, similar to the following:

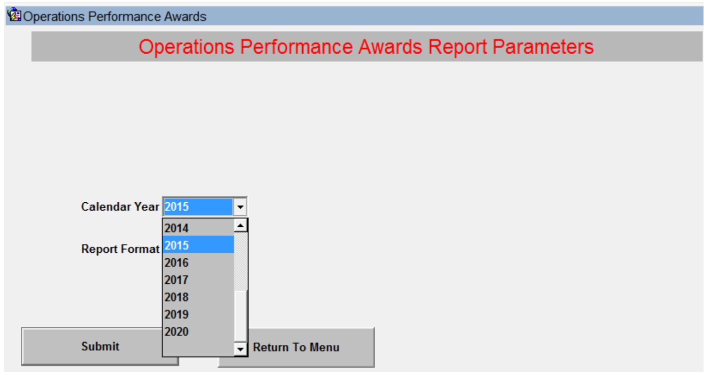
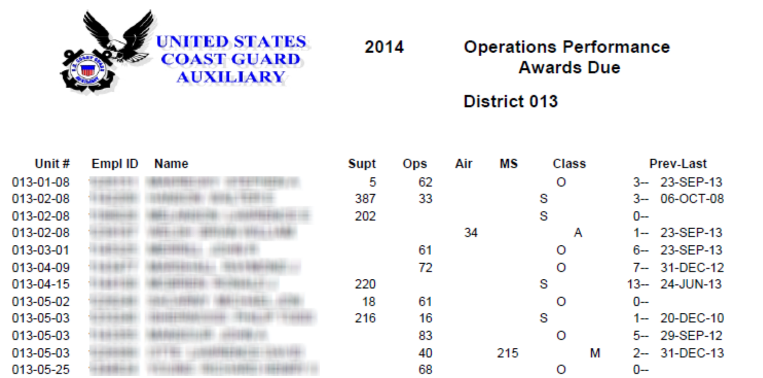


Figure 7-57 Operations Performance Awards Report Parameters Screen

2. From the **Calendar Year** list box, select the *{calendar year}* to define the report.
3. From the **Report Format** list box, select the *{report format}* (**PDF** or **CSV**).
4. Click **Submit**.

   The Operations Performance Awards Due report, similar to the following (shown in PDF format), opens in a separate browser window:



UNITED STATES COAST GUARD AUXILIARY

2014

Operations Performance Awards Due

District 013

Unit #	Empl ID	Name	Supt	Ops	Air	MS	Class	Prev-Last
013-01-08	[illegible]	[illegible]	5	62			O	3-- 23-SEP-13
013-02-08	[illegible]	[illegible]	387	33			S	3-- 06-OCT-08
013-02-08	[illegible]	[illegible]	202				S	0--
013-02-08	[illegible]	[illegible]			34		A	1-- 23-SEP-13
013-03-01	[illegible]	[illegible]		61			O	6-- 23-SEP-13
013-04-09	[illegible]	[illegible]		72			O	7-- 31-DEC-12
013-04-15	[illegible]	[illegible]	220				S	13-- 24-JUN-13
013-05-02	[illegible]	[illegible]	18	61			O	0--
013-05-03	[illegible]	[illegible]	216	16			S	1-- 20-DEC-10
013-05-03	[illegible]	[illegible]		83			O	5-- 29-SEP-12
013-05-03	[illegible]	[illegible]		40		215	M	2-- 31-DEC-13
013-05-25	[illegible]	[illegible]		68			O	0--

Figure 7-58 Operations Performance Awards Due Report

7.25.4 Sustained Auxiliary Service Award

This report provides Auxiliary members' total service hours for the issuance of a Sustained Auxiliary Service Award. To run this report, perform the following steps:

1. In the **Admin Reports** menu, click **Sustained Service Awards**.

   The Sustained Service Awards Report Parameters screen appears, similar to the following:

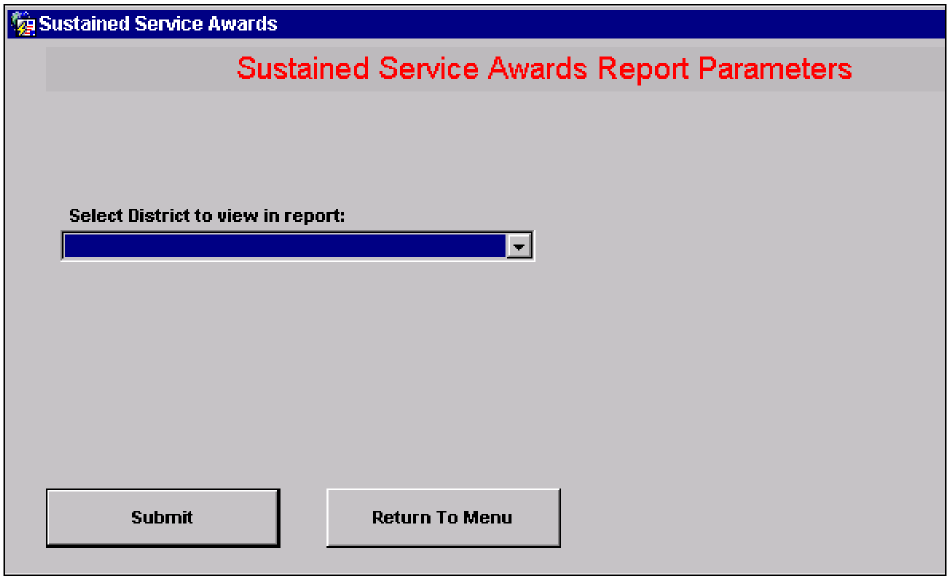
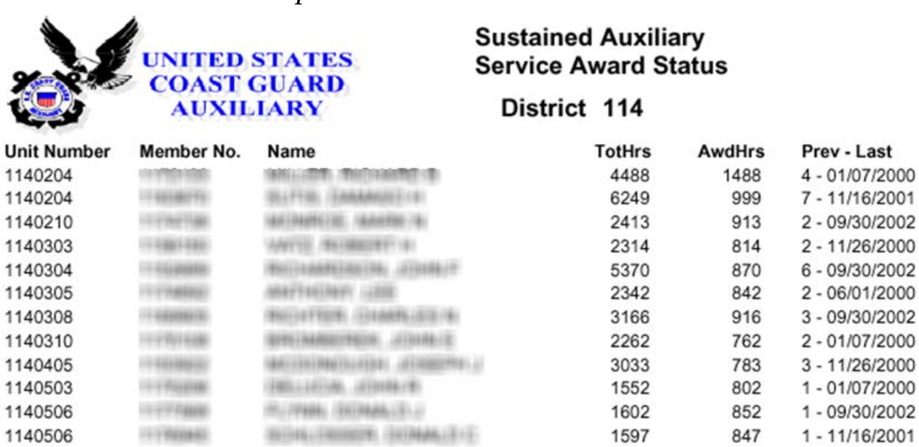


Figure 7-59 Sustained Service Awards Report Parameters Screen

2. From the **District** list box, select the `{district}` on which the report is being made.
3. Click **Submit**.

A Sustained Auxiliary Service Award Status report, similar to the following, opens in a separate browser window:



Sustained Auxiliary
Service Award Status

District 114

Unit Number	Member No.	Name	TotHrs	AwdHrs	Prev - Last
1140204	[illegible]	[illegible]	4488	1488	4 - 01/07/2000
1140204	[illegible]	[illegible]	6249	999	7 - 11/16/2001
1140210	[illegible]	[illegible]	2413	913	2 - 09/30/2002
1140303	[illegible]	[illegible]	2314	814	2 - 11/26/2000
1140304	[illegible]	[illegible]	5370	870	6 - 09/30/2002
1140305	[illegible]	[illegible]	2342	842	2 - 06/01/2000
1140308	[illegible]	[illegible]	3166	916	3 - 09/30/2002
1140310	[illegible]	[illegible]	2262	762	2 - 01/07/2000
1140405	[illegible]	[illegible]	3033	783	3 - 11/26/2000
1140503	[illegible]	[illegible]	1552	802	1 - 01/07/2000
1140506	[illegible]	[illegible]	1602	852	1 - 09/30/2002
1140506	[illegible]	[illegible]	1597	847	1 - 11/16/2001

Figure 7-60 Sustained Auxiliary Service Award Status Report

7.25.5 RBS Device Award Report

A Recreational Boating Safety (RBS) Device Award report provides a list of Auxiliary personnel who are due for an RBS Device Award, based on 120 credits earned for two consecutive years. To run this report, perform the following steps:

1. In the **Admin Reports** menu, click **RBS Device Awards**.

The RBS Device Award Report Parameters screen appears, similar to the following:

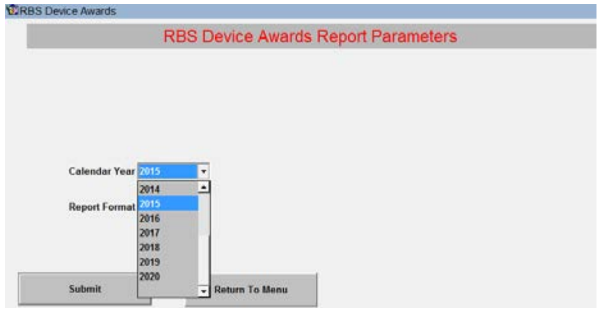
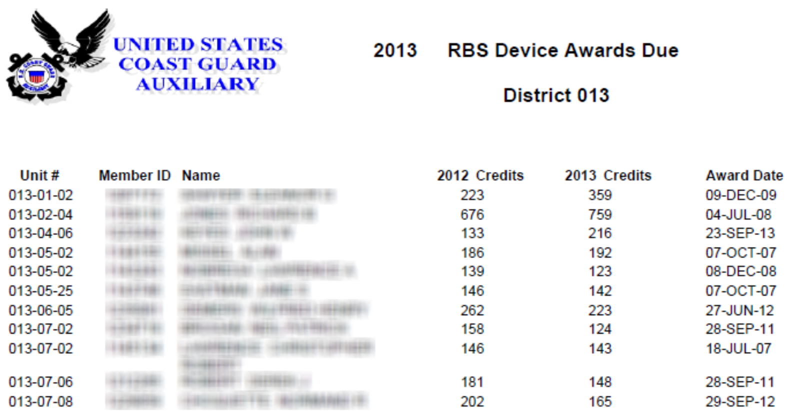


Figure 7-61 RBS Device Award Report Parameters Screen

2. From the **Calendar Year** list box, select the most current `{calendar year}` available that can run the report.
3. From the **Report Format** list box, select the `{report format}` (**PDF** or **CSV**).
4. Click **Submit**.

   The report opens in a separate browser window and displays all personnel listed and their earned credits for the current year, similar to the following (shown in PDF format):



UNITED STATES COAST GUARD AUXILIARY

2013 RBS Device Awards Due

District 013

Unit #	Member ID	Name	2012 Credits	2013 Credits	Award Date
013-01-02	[illegible]	[illegible]	223	359	09-DEC-09
013-02-04	[illegible]	[illegible]	676	759	04-JUL-08
013-04-06	[illegible]	[illegible]	133	216	23-SEP-13
013-05-02	[illegible]	[illegible]	186	192	07-OCT-07
013-05-02	[illegible]	[illegible]	139	123	08-DEC-08
013-05-25	[illegible]	[illegible]	146	142	07-OCT-07
013-06-05	[illegible]	[illegible]	262	223	27-JUN-12
013-07-02	[illegible]	[illegible]	158	124	28-SEP-11
013-07-02	[illegible]	[illegible]	146	143	18-JUL-07
013-07-06	[illegible]	[illegible]	181	148	28-SEP-11
013-07-08	[illegible]	[illegible]	202	165	29-SEP-12

Figure 7-62 RBS Device Awards Due Screen

8. TRAINING

The Training Management Tool (TMT) allows users to insert, update, and delete tasks and competencies; insert and update assignments; capture tasks; view references; and insert, update, and delete certifications. The following sections elaborate on the specific buttons the TMT allows. To access TMT, perform the following steps:

8.1 Accessing TMT

1. In the AUXDATA main menu, click **Training**.

   The TMT main menu appears, similar to the following:

Figure 8-1 Training Management Tool Main Menu

8.2 Assignments

The **Assignments** feature allows users to assign competencies to units, tasks to competencies, and competencies to people.

8.2.1 Assign Competencies to Units

To assign competencies to units, perform the following steps:

1. In the TMT main menu, click **ASSIGNMENTS**.
2. Click **ASSIGN COMPETENCIES TO UNITS**.

   The Unit Selection screen appears, similar to the following:

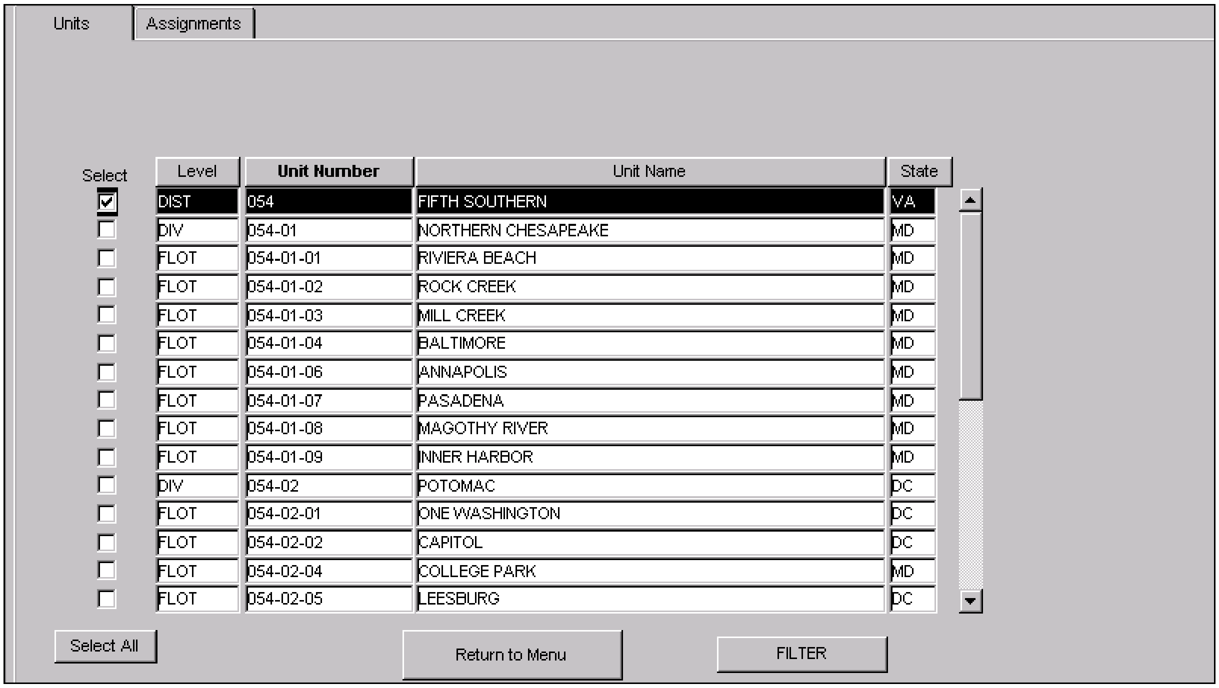


Figure 8-2 Unit Selection Screen

3. Select the check boxes for the *{unit(s)}* being assigned competencies.
4. Click the **Assignments** tab.

   The Assignments screen appears, similar to the following:

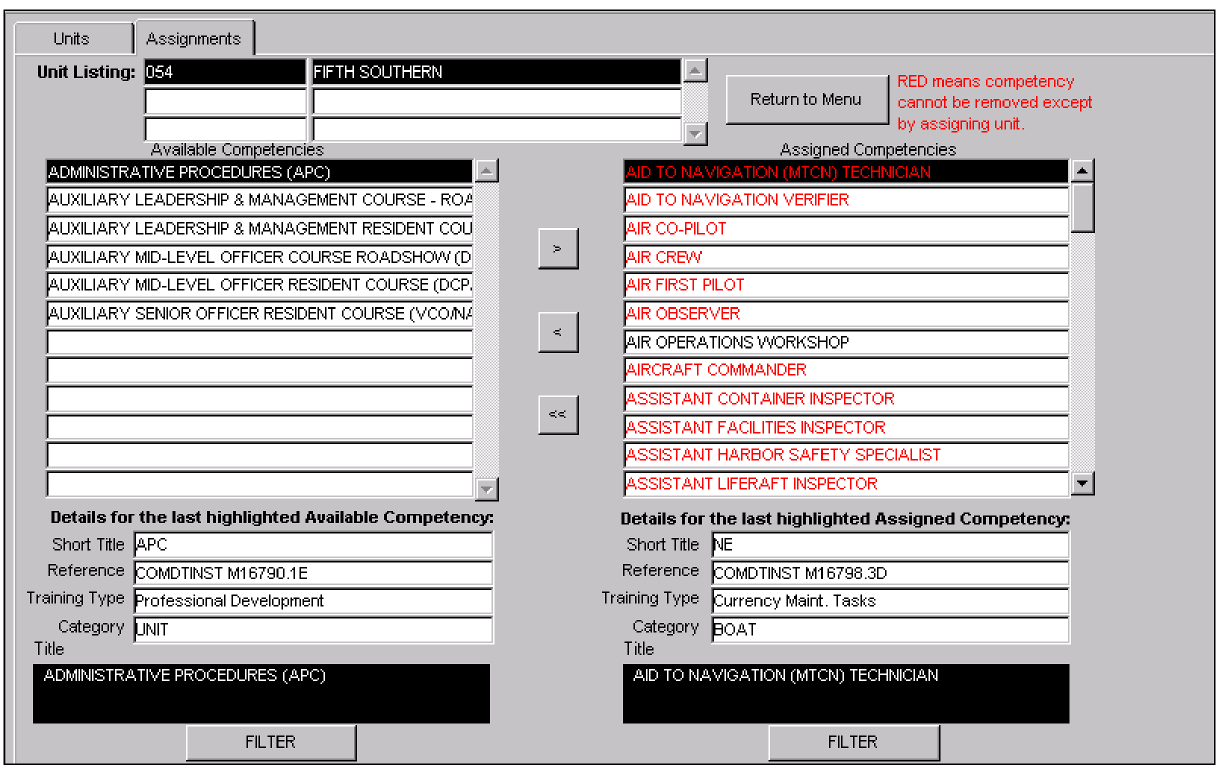
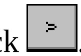


Figure 8-3 Assignments Screen

5. Select the *{desired competency}* under **Available Competencies**, and then click 

.

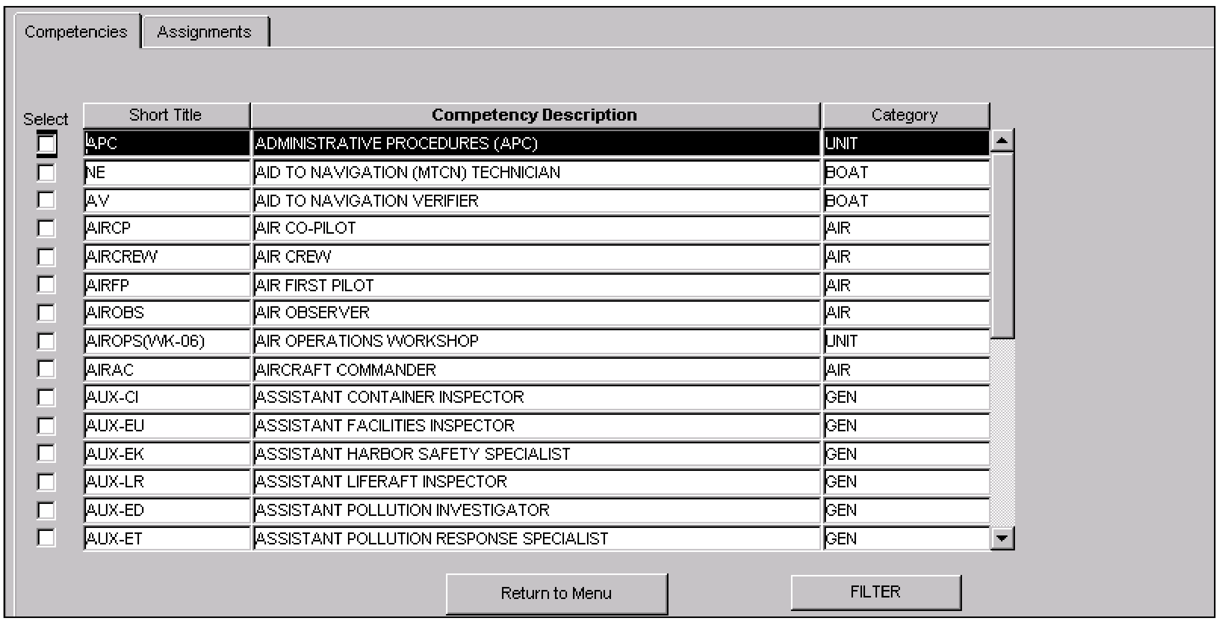
   The {selected competencies} *are moved from* ***Available Competencies*** *to* ***Assigned Competencies****.*

8.2.2 Assign Tasks to Competencies

To assign tasks to competencies, perform the following steps:

1. In the TMT main menu, click **ASSIGNMENTS**.
2. Click **ASSIGN TASKS TO COMPETENCIES**.

   The Competencies Selection screen appears, similar to the following:



Select	Short Title	Competency Description	Category
☐	APC	ADMINISTRATIVE PROCEDURES (APC)	UNIT
☐	NE	AID TO NAVIGATION (MTCN) TECHNICIAN	BOAT
☐	AV	AID TO NAVIGATION VERIFIER	BOAT
☐	AIRCP	AIR CO-PILOT	AIR
☐	AIRCREW	AIR CREW	AIR
☐	AIRFP	AIR FIRST PILOT	AIR
☐	AIROBS	AIR OBSERVER	AIR
☐	AIROPS(WK-06)	AIR OPERATIONS WORKSHOP	UNIT
☐	AIRAC	AIRCRAFT COMMANDER	AIR
☐	AUX-CI	ASSISTANT CONTAINER INSPECTOR	GEN
☐	AUX-EU	ASSISTANT FACILITIES INSPECTOR	GEN
☐	AUX-EK	ASSISTANT HARBOR SAFETY SPECIALIST	GEN
☐	AUX-LR	ASSISTANT LIFERAFT INSPECTOR	GEN
☐	AUX-ED	ASSISTANT POLLUTION INVESTIGATOR	GEN
☐	AUX-ET	ASSISTANT POLLUTION RESPONSE SPECIALIST	GEN

Figure 8-4 Competencies Selection Screen

3. Select the check boxes for the *{competencies}* being assigned tasks.
4. Click the **Assignments** tab.

   The Assignments Selection screen appears, similar to the following:

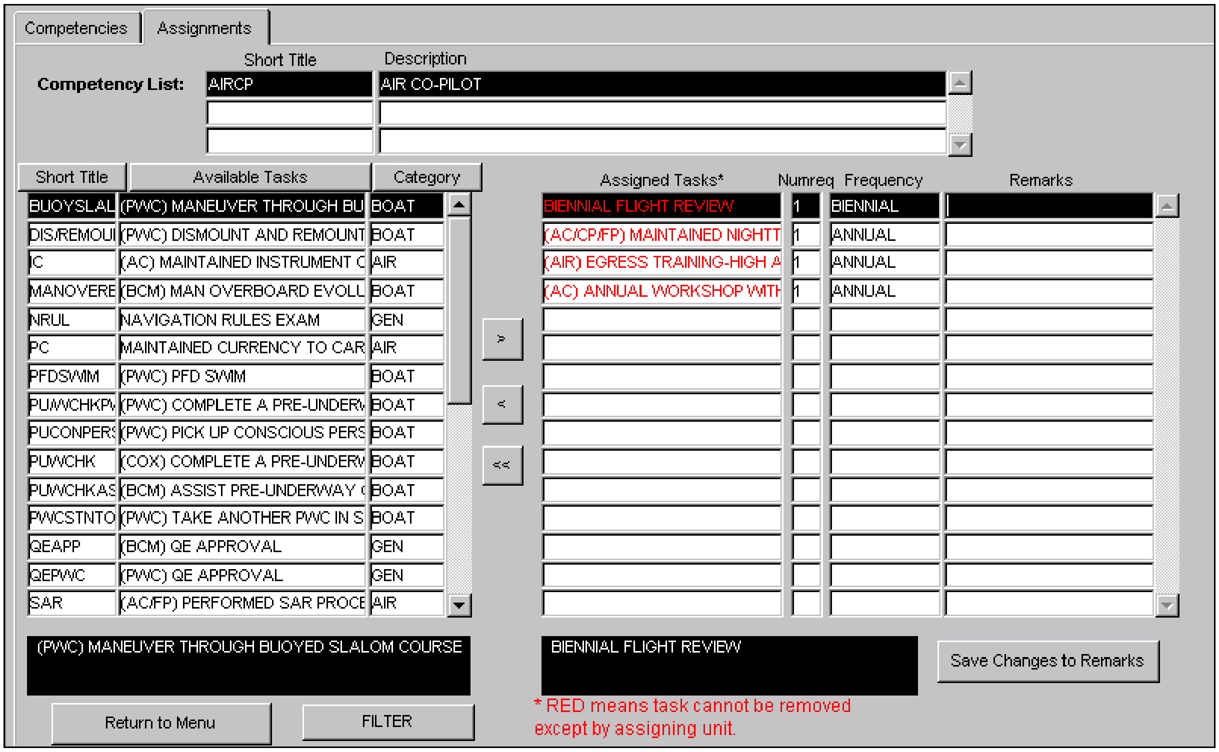
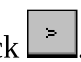


Figure 8-5 Assignments Selection Screen

5. Click the **Available Tasks** being assigned, and then click .

   The `{selected tasks}` *are moved from* ***Available Tasks*** *to* ***Assigned Tasks***.

8.2.3 Assign Competencies to People

To assign competencies to people, perform the following steps:

1. In the TMT main menu, click **ASSIGNMENTS**.
2. Click **ASSIGN COMPETENCIES TO PEOPLE**.

   The Members Selection screen appears, similar to the following:

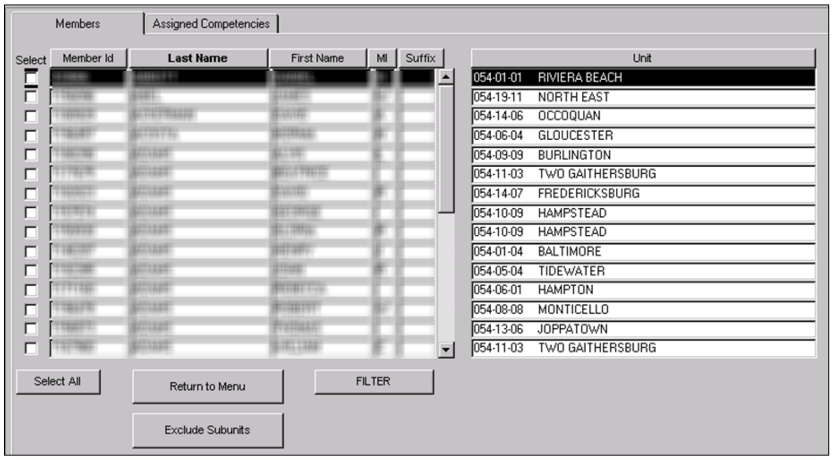


Figure 8-6 Members Selection Screen

3. Select the check boxes for the *{member(s)}* being assigned competencies. If needed, use the **Filter** to shorten the list of members displayed.
4. Click the **Assigned Competencies** tab.

   The Assigned Competencies screen appears, similar to the following:

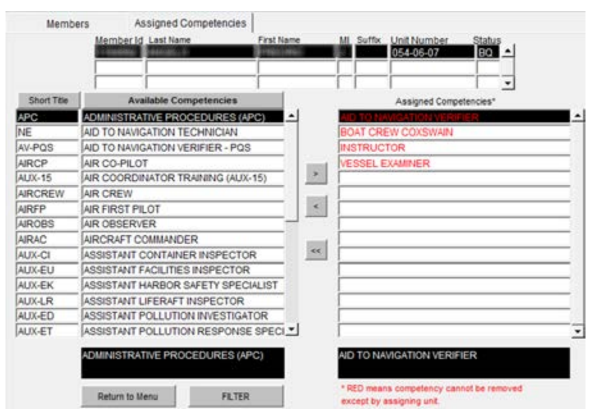
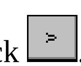


Figure 8-7 Assigned Competencies Screen

5. Select the *{desired member}*.
6. Under **Available Competencies**, select the *{competencies}* to assign, and then click .

   The {selected competencies} *are moved from* ***Available Competencies*** *to* ***Assigned Competencies*** *and are assigned to the* {selected member(s)}.

8.3 Certifications

The **Certifications** feature allows users to view individual certifications for crewmembers of a unit and its subordinate units. To view certifications, perform the following steps:

1. In the TMT main menu, click **CERTIFICATIONS**.

   The Members Selection screen appears, similar to the following:

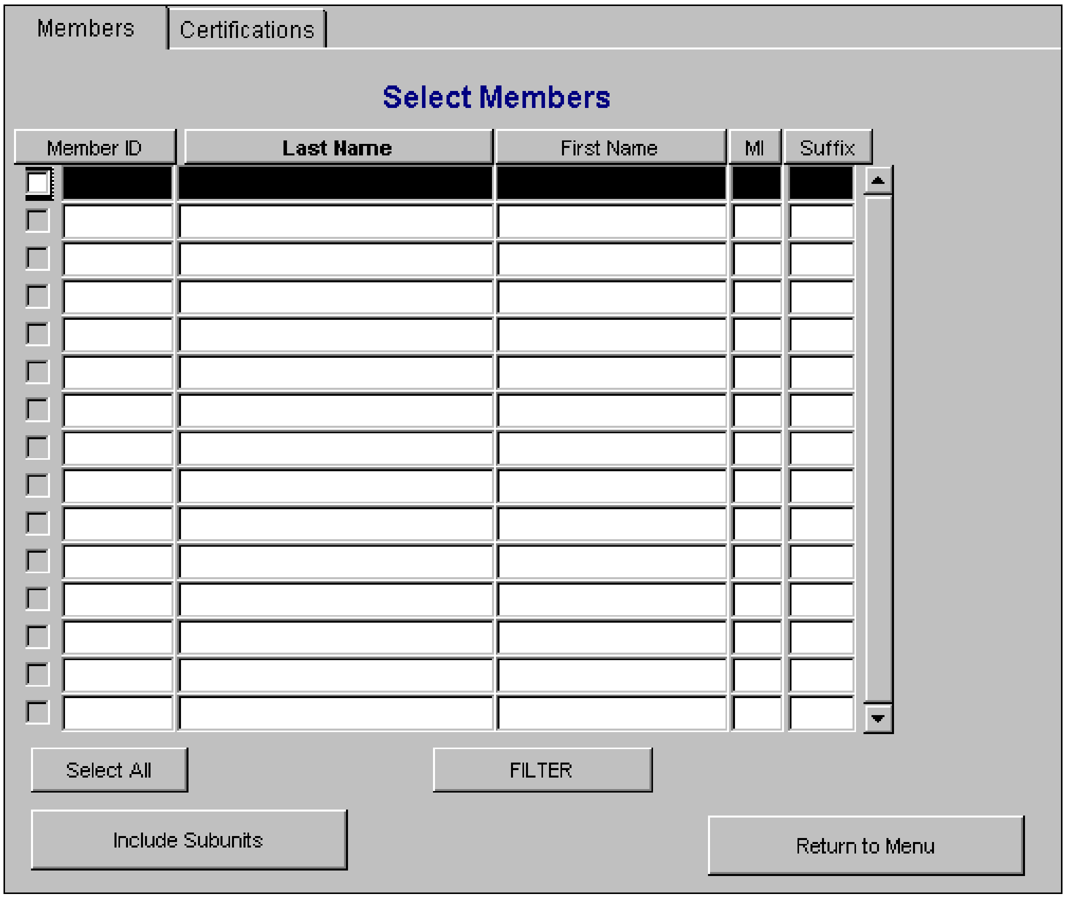


Figure 8-8 Members Selection Screen

2. Select the check boxes for the *{member(s)}* whose certification is being viewed. If needed, use the **Filter** feature to shorten the list of crewmembers displayed.
3. Click the **Certifications** tab.

   The Certifications screen appears, similar to the following:

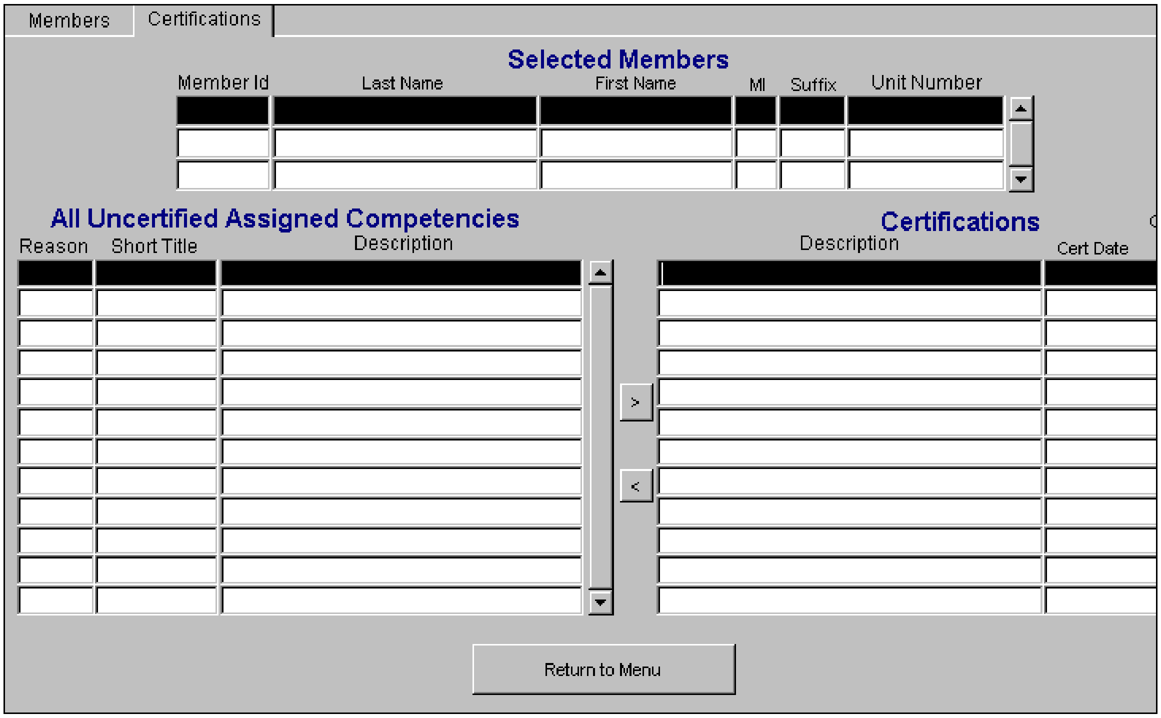
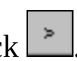
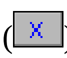


Figure 8-9 Certifications Screen

4. Select the `{desired member}`.

5. Select the desired **Uncertified Assigned Competencies**, and then click .

   The `{selected competencies}` *are moved from **All Uncertified Assigned Competencies** to **Certifications**.*

6. Click the **Calendar** button (), select the `{date}`, and then click **OK**.

   The `{certification date}` *is entered and saved.*

8.4 Reference Tables

The **Reference Tables** feature allows users to insert and delete the following: training type, category, certification, frequency, reference manuals, notes, and task notes for reference. This section provides instructions for performing these tasks. Only users with the HQ role have access to this screen.

To access the **Reference Tables** feature, perform the following step:

1. In the TMT main menu, click **REFERENCE TABLES**.

   The Reference Tables screen appears, similar to the following:

Figure 8-10 Reference Tables Screen

8.4.1 Training Type

To insert and delete training type descriptions, perform the following steps:

1. In the TMT main menu, click **REFERENCE TABLES**.

    *The Reference Tables screen opens with the **TRAINING TYPE** tab selected.*

2. To insert a *{new training type}*, select the next blank text box on the Training Type screen, enter *{the information for the new training type description}*, and then click **Save**.

    The {new training type} *is entered and saved.*

3. To delete a *{training type}*, select *{the training type description to be deleted}*, and then click **Delete**.

    The training type description is deleted.

8.4.2 Category

To insert and delete categories, perform the following steps:

1. On the Reference Tables screen, click the **CATEGORY** tab.

    The Category screen appears, similar to the following:

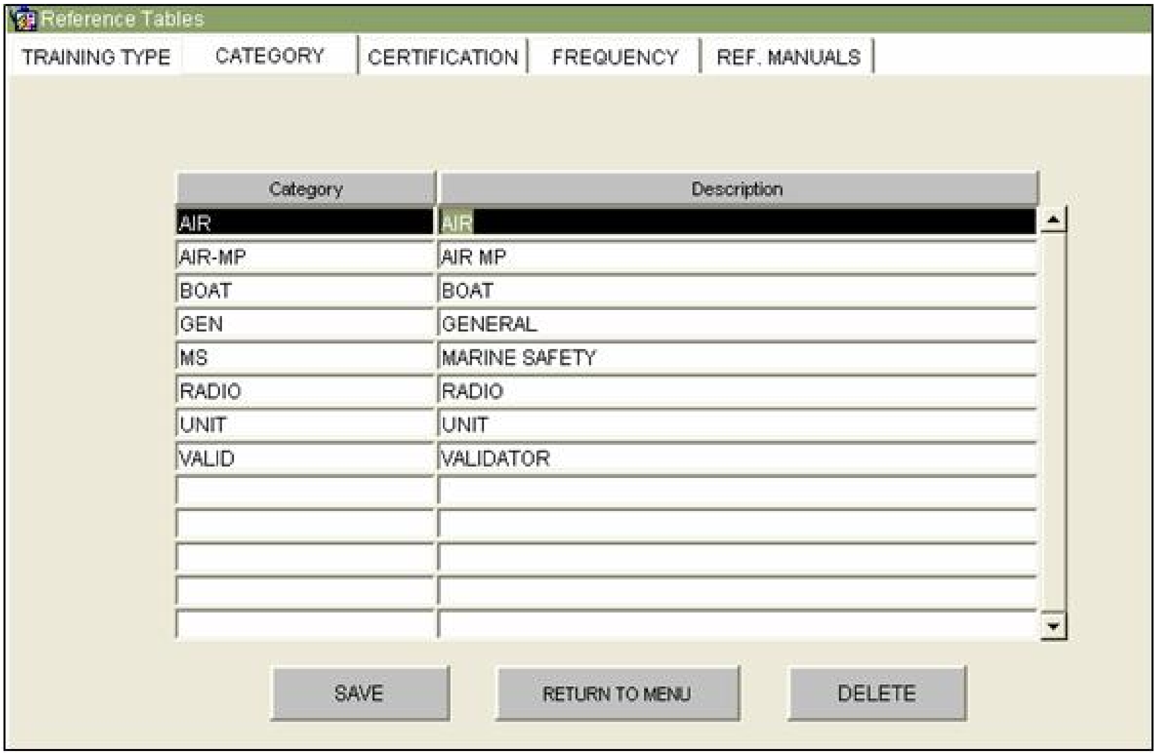


Figure 8-11 Category Screen

2. To insert a *{new category}*, select the next blank text box on the Category screen, enter *{the information for the new category and description}*, and then click **Save**.

    The {new category} *is entered and saved.*

3. To delete a *{category}*, select the *{category to be deleted}*, and then click **Delete**.

    The category is deleted.

8.4.3 Certification

To insert and delete certifications, perform the following steps:

1. On the Reference Tables screen, click the **CERTIFICATION** tab.

   The Certification screen appears, similar to the following:

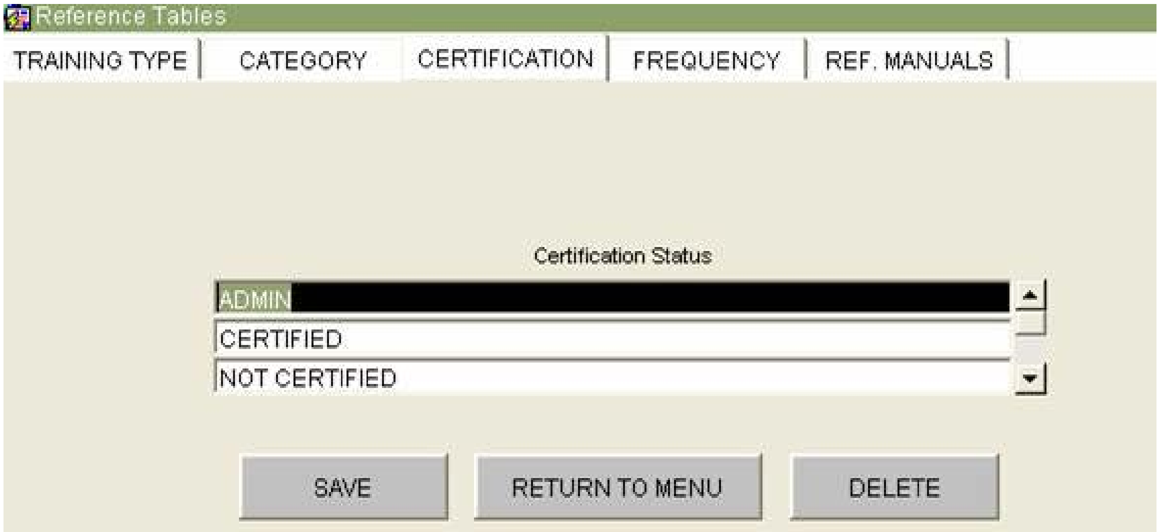


Figure 8-12 Certification Screen

2. To insert a *{new certification}*, select the next blank text box on the Certification screen, enter *{the information for the new certification status}*, and then click **Save**.

   The {certification status} *is entered and saved.*

3. To delete a certification, select the *{certification status to be deleted}*, and then click **Delete**.

   The certification status is deleted.

8.4.4 Frequency

To insert and delete frequencies, perform the following steps:

1. On the Reference Tables screen, click the **FREQUENCY** tab.

   The Frequency screen appears, similar to the following:

Figure 8-13 Frequency Screen

2. To insert a *{new frequency}*, select the next blank text box on the Frequency screen, enter *{the information for the month and description}*, and then click **Save**.

   The {frequency} *is entered and saved.*

3. To delete a *{frequency}*, select the *{frequency to be deleted}*, and then click **Delete**.

   The frequency is deleted.

8.4.5 Reference Manuals

To insert and delete reference manuals, perform the following steps:

1. On the Reference Tables screen, click the **REF. MANUALS** tab.

   The Ref. Manuals screen appears, similar to the following:

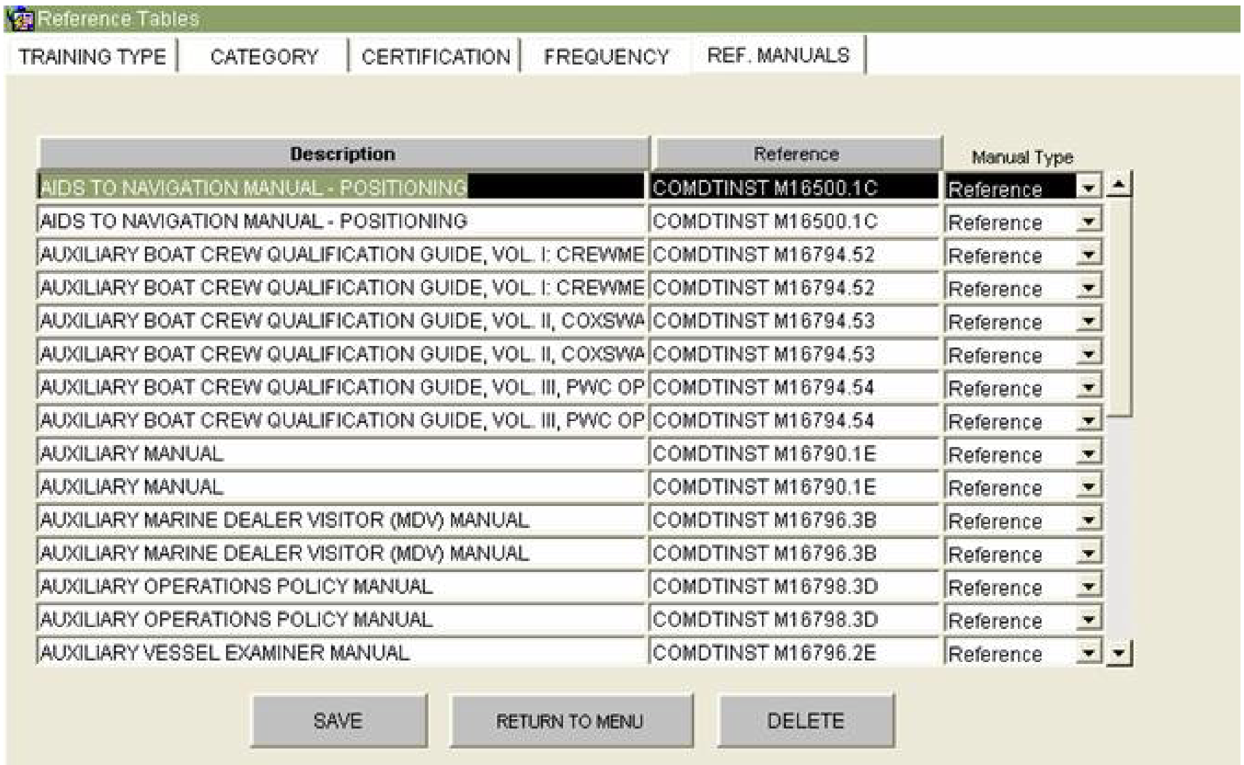


Figure 8-14 Reference Manuals Screen

2. To insert a new *{reference manual}*, select the next blank text box on the Reference Manuals screen, enter *{the information for the description and the reference}*, use the list box to select the *{manual type}*, and then click **Save**.

   The {manual} *is entered and saved.*

3. To delete a *{reference manual}*, select the *{reference manual to be deleted}*, and then click **Delete**.

   The manual is deleted.

8.5 Task Capture

The **Task Capture** feature allows users to capture tasks and include eligible participants. This section provides instructions for performing these functions. To access **Task Capture**, perform the following step:

1. In the TMT main menu, click **TASK CAPTURE**.

   The Tasks screen appears, similar to the following:

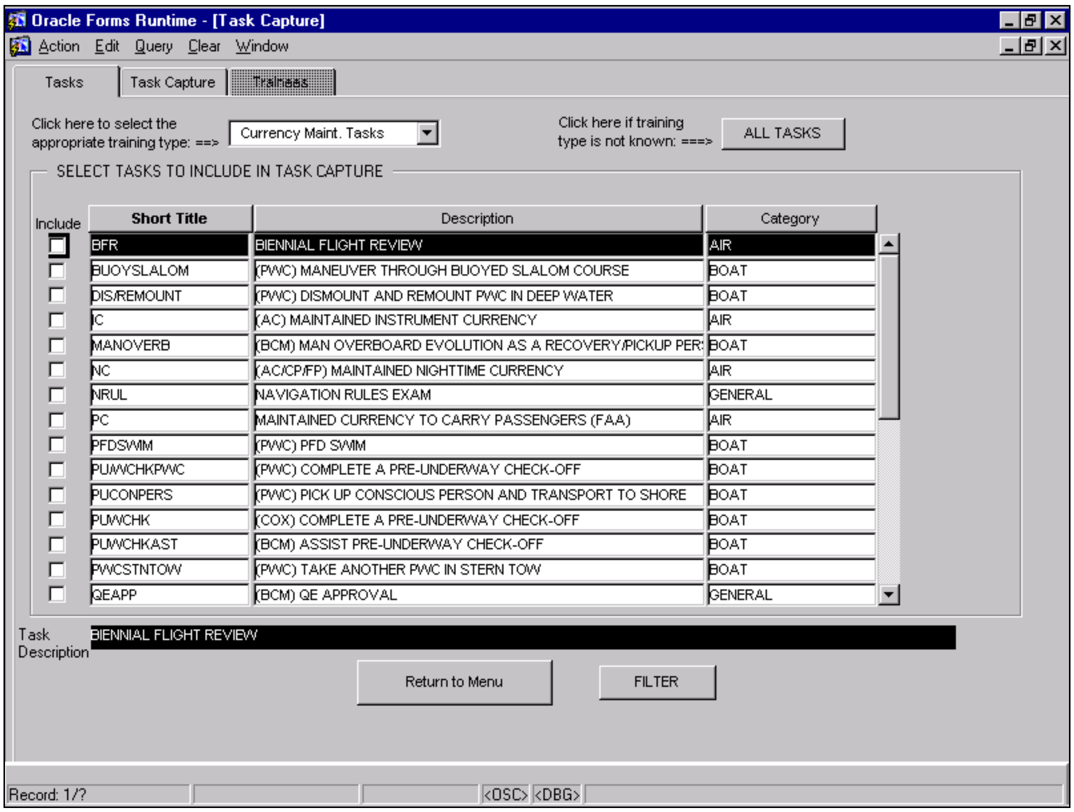


Figure 8-15 Tasks Screen

8.5.1 Tasks

To select the tasks to include in the task capture, perform the following step:

1. Select the check boxes for the tasks being captured.

8.5.2 Task Capture

The Task Capture screen allows users to view tasks captured in the following time periods: two months, four months, or eight months.

1. After selecting the tasks to include in the task capture (*Section 8.5.1 Tasks*), click the **Task Capture** tab.

   The Task Capture screen appears, similar to the following:

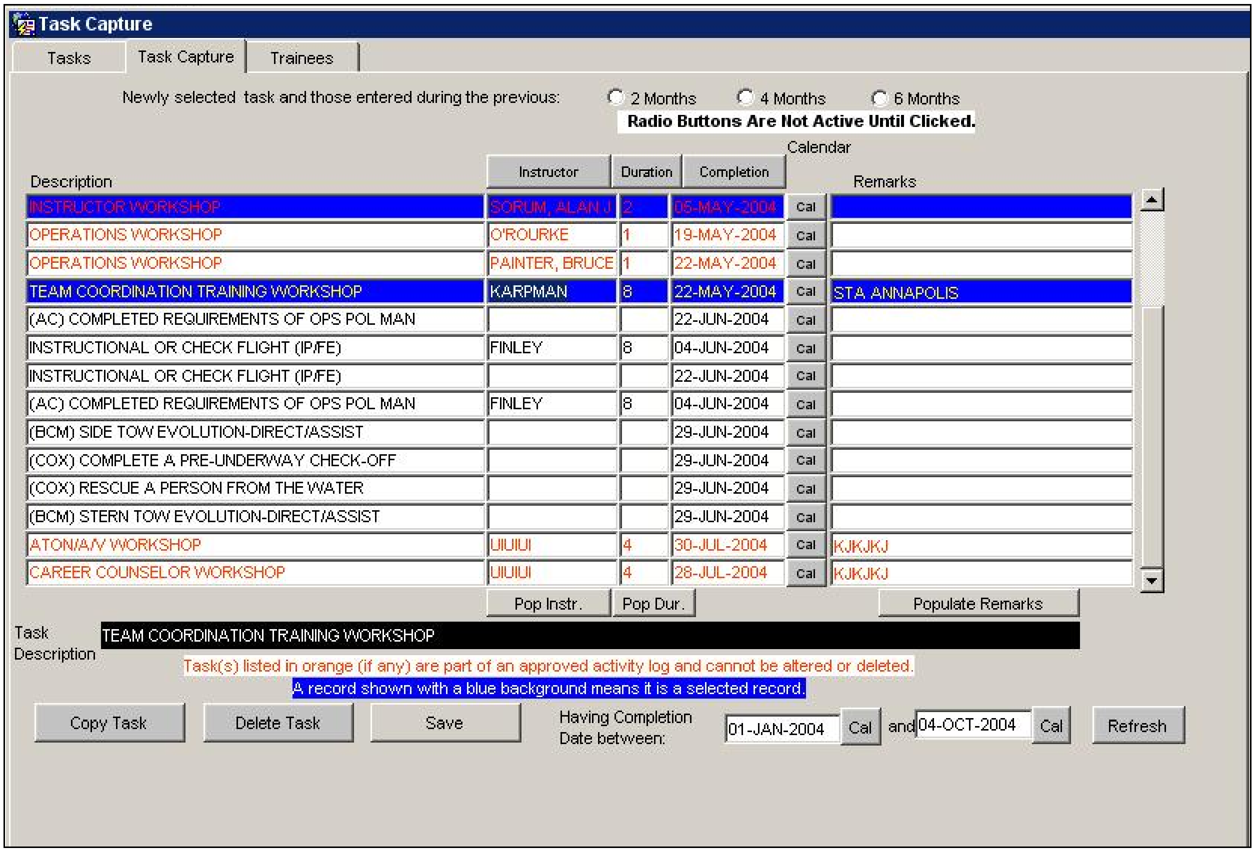


Figure 8-16 Task Capture Screen

NOTE 1: *To view a list of tasks retrospective to two months, four months, and six months, click the **2 Months**, **4 Months**, or **6 Months** option buttons.*

NOTE 2: *To view a list of tasks completed within a specific time period, enter beginning and ending dates in the **Having Completion Date Between** section of the Task Capture screen, and then click **Refresh**.*

2. Select the *{desired description}*.
3. Enter the *{necessary information}* (using the list boxes when available), press the **TAB** key after each entry to move to the next text box, and then click **Save**.

   The {information} *is entered and saved.*

4. To copy a task, select it, and then click **Copy Task**.

   The highlighted task is copied to the next available text box.

5. To delete a task, select it, and then click **Delete Task**.

   The highlighted task is deleted.

8.5.3 Trainees

The Trainees screen allows users to move members from **Eligible Participants** to **Participants** (in a unit and subordinate units) in the tasks captured. To select the participants to include in the task capture, perform the following steps:

1. On the Task Capture screen, select *{a description}*, and then click the **Trainees** tab.

   The Trainees screen appears, similar to the following:

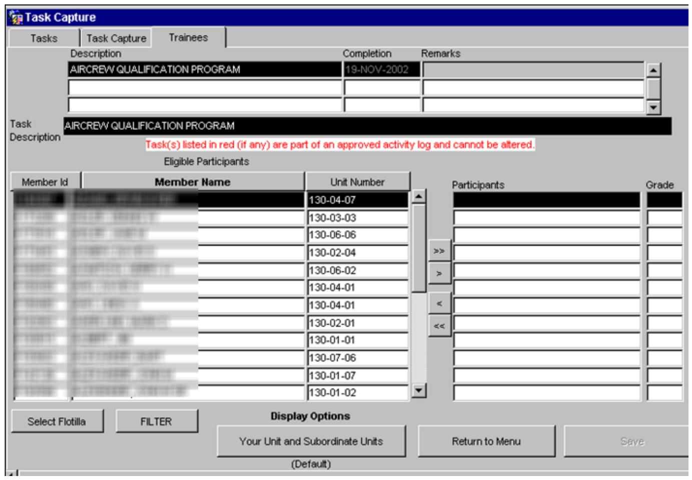
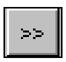
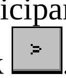


Figure 8-17 Trainees Screen

2. Select the description of the *{desired task}*.

3. Click  to include all of the members as participants. If not all members participated, select the *{desired member(s)}*, and then click . If needed, use the **Filter** feature to shorten the list of members displayed.

   The {member} *is highlighted and moved from* ***Eligible Participants*** *to* ***Participants***.

8.6 Task Maintenance

The **Task Maintenance** feature allows users to insert, update, and delete active and inactive tasks for a unit and/or subordinate units. Perform the following steps to access the **Task Maintenance** feature:

1. In the TMT main menu, click **TASK Maintenance**.

   The Task Maintenance screen appears, similar to the following:

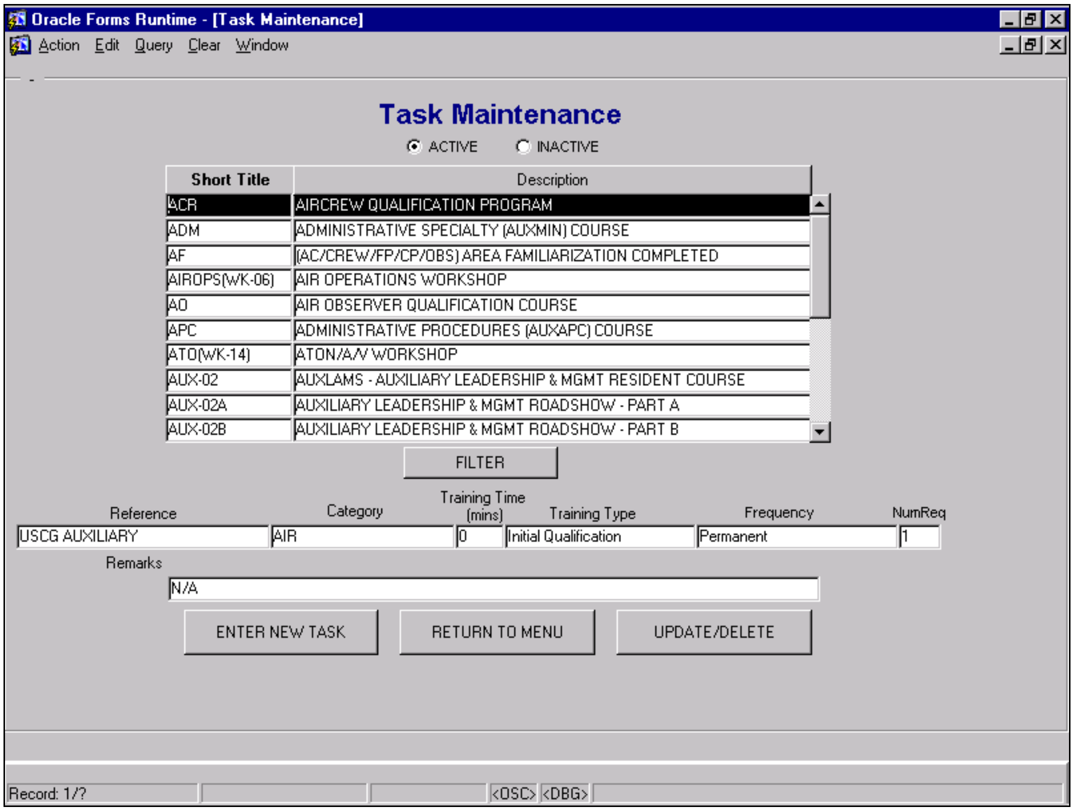


Figure 8-18 Task Maintenance Screen

2. Proceed to the following sections for instructions on performing the various duties in **Task Maintenance**.

8.6.1 Enter a New Task

To enter a new task, perform the following steps:

1. On the Task Maintenance screen, click **ENTER NEW TASK**.

   The Task screen appears, similar to the following:

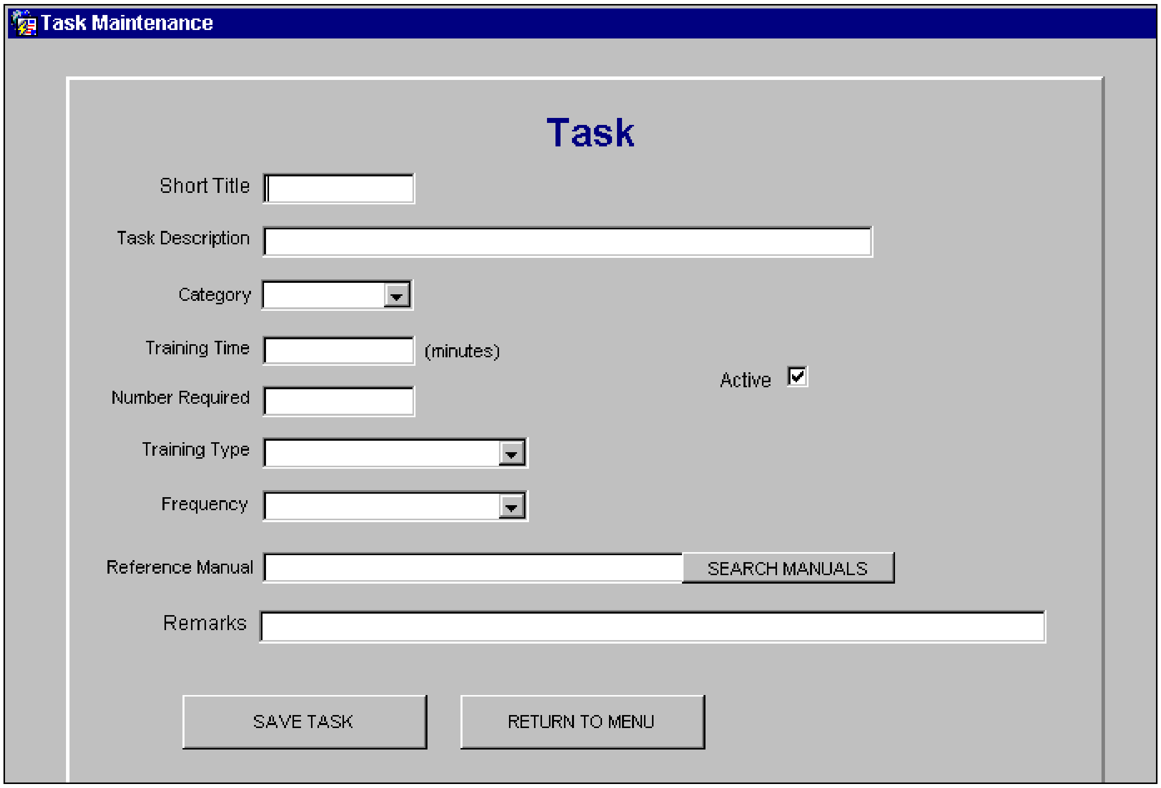


Figure 8-19 Task Screen

2. Enter the *{required information}* (using the list boxes when available), press the **TAB** key after each entry to move to the next text box, and then click **Save Task**.

   The Task Maintenance screen appears, and the {task} *is entered and saved.*

8.6.2 Update a Task

To update a task, perform the following steps:

1. On the Task Maintenance screen, select the *{desired task}* to be updated, and then click **UPDATE/DELETE**.

   The Task screen appears with the {task information} *listed.*

2. Enter the *{current information}*, and then click **SAVE TASK**.

   The {task information} *is entered and saved, and then the Task Maintenance screen appears.*

8.6.3 Delete a Task

To delete a task, perform the following steps:

1. On the Task Maintenance screen, select the *{desired task}* to be deleted, and then click **UPDATE/DELETE**.

   The Task screen appears with the {task information} *listed.*

2. Click **DELETE TASK**.

   The {task information} *is deleted, and then the Task Maintenance screen appears.*

8.7 Competency Maintenance

The **Competency Maintenance** feature allows users to insert, update, and delete active and inactive competencies for a unit and/or subordinate units. To use the **Competency Maintenance** feature, perform the following steps:

1. In the TMT main menu, click **COMPETENCY Maintenance**.

   The Competency Maintenance screen appears, similar to the following:

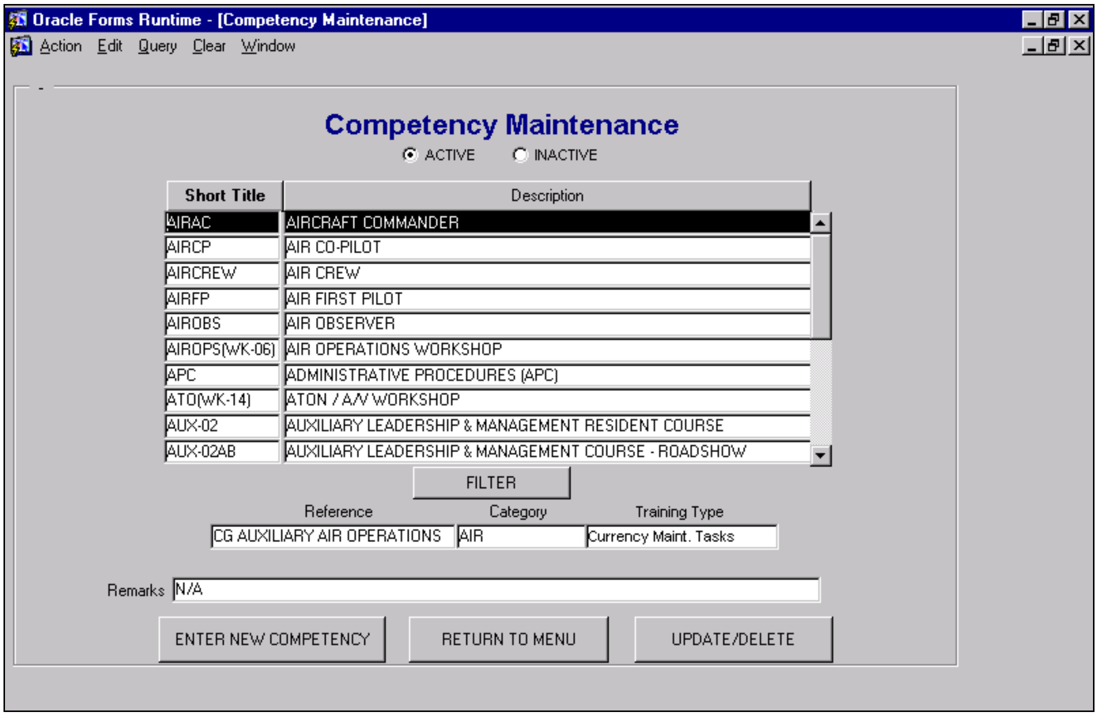


Figure 8-20 Competency Maintenance Screen

2. Proceed to the following sections for instructions on performing the various duties in Competency Maintenance.

8.7.1 Enter a New Competency

To enter a new competency, perform the following steps:

1. On the Competency Maintenance screen, click **ENTER NEW COMPETENCY**.

   The Competency screen appears, similar to the following:

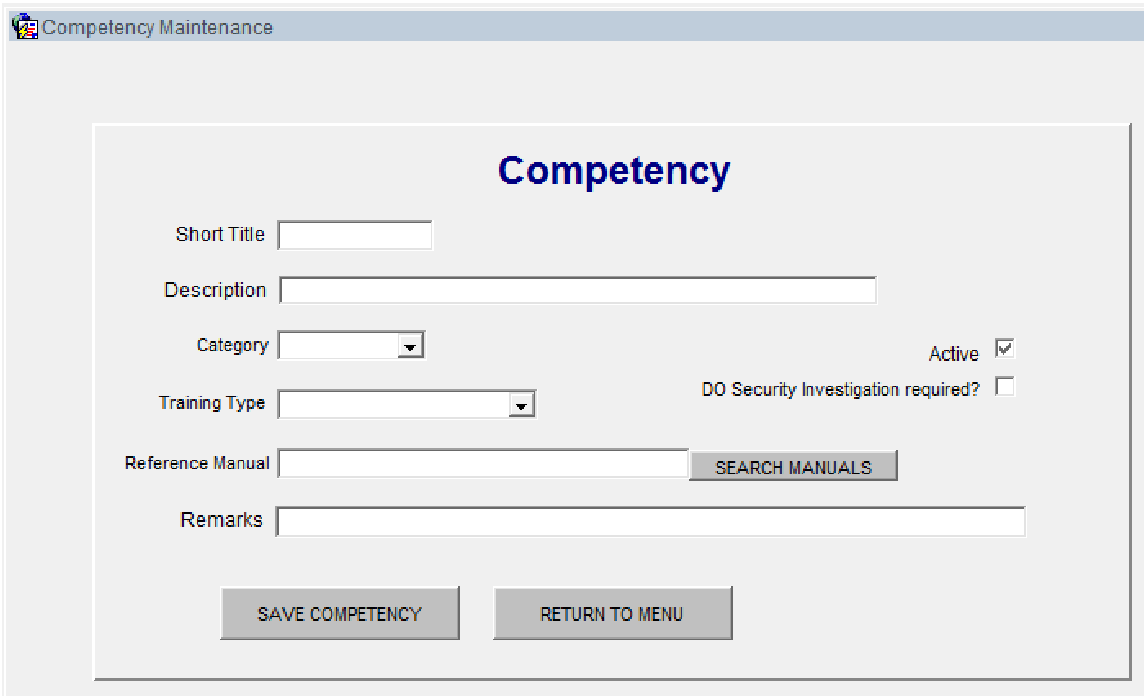


Figure 8-21 Competency Screen

2. Enter the *{required information}* (using the list boxes when available), press the **TAB** key after each entry to move to the next text box, click the appropriate check boxes, and then click **Save Task**.

   The Competency Maintenance screen appears, and then the {competency} *is entered and saved.*

8.7.2 Update a Competency

To update a competency, perform the following steps:

1. On the Competency Maintenance screen, select the *{desired competency}* to be updated, and then click **UPDATE/DELETE**.

   The Competency screen appears with the {competency information} *listed.*

2. Enter the *{current information}*, and then click **SAVE COMPETENCY**.

   The {competency information} *is entered and saved, and then the Competency Maintenance screen appears.*

8.7.3 Delete a Competency

To delete a competency, perform the following steps:

1. On the Competency Maintenance screen, select the *{desired competency}* to be deleted, and then click **UPDATE/DELETE**.

   The Competency screen appears with the {competency information} *listed.*

2. Click **DELETE COMPETENCY.**

   The {competency information} *is deleted, and then the Competency Maintenance screen appears.*

8.8 Reports

The **Reports** feature takes users to the TMT **Reports** menu, where reports can be run on individuals and/or units for the following: training status, training record, certifications, and training management. To access the TMT **Reports** menu, perform the following steps:

1. In the TMT main menu, click **REPORTS**.

   *The TMT **Reports** menu appears, similar to the following:*

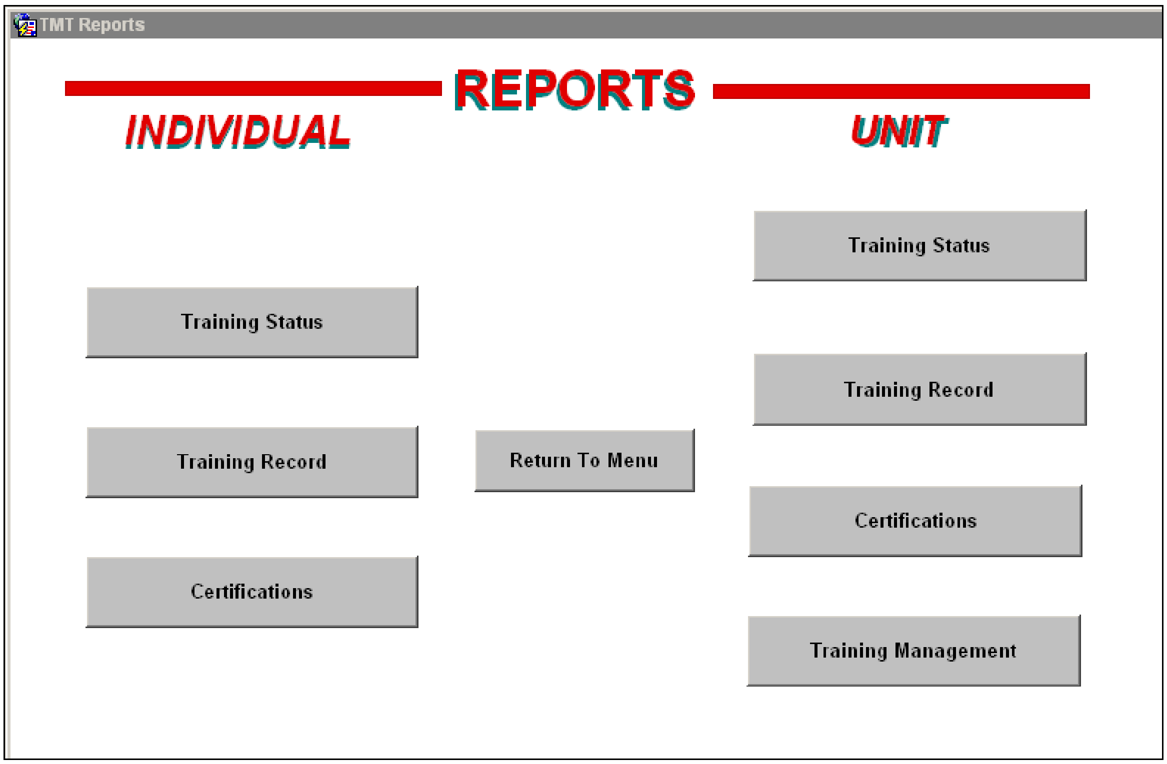


Figure 8-22 TMT Reports Menu

8.8.1 Individual Training Status Report

Run an Individual Training Status report to retrieve an individual's training status. To run this report, perform the following steps:

1. In the TMT **Reports** menu, click **Training Status** under **INDIVIDUAL**.

   The Individual Training Status Report Criteria screen appears, similar to the following:

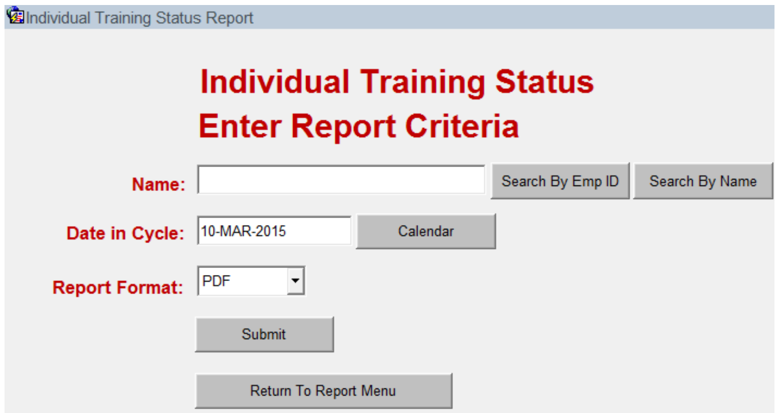


Figure 8-23 Individual Training Status Report Criteria Screen

2. Use either the **Search by Emp ID** or the **Search by Name** button to enter the individual's *{name}* in the **Name** field. These buttons activate a **List of Values** from which the individual's *{name}* is selected.

   The {name} *appears in the* ***Name*** *field.*

3. Use the **Calendar** button to define the {**Date in Cycle**} for the report.

NOTE: *If the* {selected **Date in Cycle**} *is earlier than 2007, the report data reflects currency requirements in effect in 2006. If the* {**Date in Cycle**} *is 2007 or later, the report reflects existing currency requirements.*

4. Use the **Report Format** list box to select a *{report format}* (**CSV** or **PDF**).

5. Click **Submit**.

   The Training Status Individual Report, similar to the following (shown in PDF format), opens in a separate internet browser window (see Figure 7-2 and its preceding note for an explanation about how to view the windows):

Training Status Individual Report

UNITED STATES COAST GUARD AUXILIARY

054-06-07 WILLIAMSBURG

5555555 COLLINS, STEPHANIE R

Date in Cycle 03 FEB 2015

Competency BOAT CREW COXSWAIN

Currency of Competency CERTIFIED

Task	Current	# Complete	# Req'd	Cycle	Due Date
(BCM) QE APPROVAL	N		1	3-A(C)	
1 HR TCT REFRESHER WORKSHOP	N		1	A(C)	31-DEC-2015
4/8 HR TEAM COORDINATION TRAINING WORKSHOP	N		1	5-A(C)	
COXSWAIN U/W HOURS	N		12	A(C)	31-DEC-2015
ICS100 - INTRODUCTION TO ICS ON LINE	N		1	P	Permanent
ICS200 - BASIC ICS ON LINE	N		1	P	Permanent
INCIDENT COMMAND SYSTEM LEVEL 210 OR 300	N		1	P	Permanent
IS-700 INTRO TO NATIONAL INCIDENT MANAGEMENT SYSTEM	N		1	P	Permanent
IS-800 INTRO TO NATIONAL RESPONSE PLAN	N		1	P	Permanent
NAVIGATION RULES EXAM (70)	N		1	P	Permanent
NAVIGATION RULES EXAM (95)	N		1	5-A(S)	

KEY: "Cycle" field: (C) Calendar - Due Date based on Jan 1st calendar year, (S) Sliding - Due Date based on date last completed

"Current" field: Y - Yes = Current Cycle Requirements Completed: W - Waived = Related Task is due in Current Cycle

P - Pending = Previous Cycle Completed & Current Not Yet Completed

(Sliding tasks with a 12 month or less frequency will show as P during the last 60 days before they expire.)

(Sliding tasks with a frequency greater than 12 months will show as P during the last 365 days before they expire.)

N - No = Previous & Current Cycle Not Yet Completed

Figure 8-24 Training Status Individual Report Screen

NOTE: *This report lists tasks by competency, and a color-coding scheme is used to indicate the status of all listed tasks. The report key shown at the bottom of Figure 8-24 explains the color-coding scheme. The* ***Cycle*** *field indicates if the currency of a task is based on the January 1 calendar year or based on a sliding scale, which means the due date is based on the date the task was last completed. (C) indicates the currency is based on the calendar years, and (S) indicates the currency is based on a sliding scale.*

8.8.2 Individual Training Record Report

Run an Individual Training Record report to retrieve an individual's training record within a defined period. To run this report, perform the following steps:

1. In the TMT **Reports** menu, click **Training Record** under **INDIVIDUAL**.

   The Individual Training Record Report Criteria screen appears, similar to the following:

Figure 8-25 Individual Training Record Report Criteria Screen

2. User either the **Search by Emp ID** or the **Search by Name** button to enter the individual's *{name}* in the **Name** field. These buttons activate a **List of Values** from which the individual's *{name}* is selected.

   The {name} *appears in the* ***Name*** *field.*

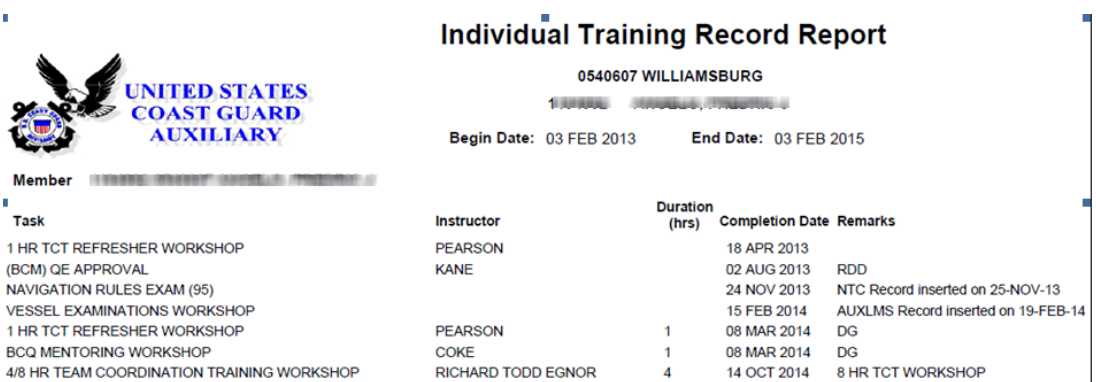
3. Use the **Calendar** buttons to define a *{begin date}* and an *{end date}* for the report.

   The {selected dates} *appear in the text boxes.*

4. Use the **Report Format** list box to select a *{report format}* (**CSV** or **PDF**).

5. Click **Submit**.

   The Individual Training Record report, similar to the following (shown in PDF format), opens in a separate internet browser window:



Individual Training Record Report

UNITED STATES COAST GUARD AUXILIARY

0540607 WILLIAMSBURG

[redacted]

Begin Date: 03 FEB 2013 **End Date:** 03 FEB 2015

Member [redacted]

Task	Instructor	Duration (hrs)	Completion Date	Remarks
1 HR TCT REFRESHER WORKSHOP	PEARSON		18 APR 2013	
(BCM) QE APPROVAL	KANE		02 AUG 2013	RDD
NAVIGATION RULES EXAM (95)			24 NOV 2013	NTC Record inserted on 25-NOV-13
VESSEL EXAMINATIONS WORKSHOP			15 FEB 2014	AUXLMS Record inserted on 19-FEB-14
1 HR TCT REFRESHER WORKSHOP	PEARSON	1	08 MAR 2014	DG
BCQ MENTORING WORKSHOP	COKE	1	08 MAR 2014	DG
4/8 HR TEAM COORDINATION TRAINING WORKSHOP	RICHARD TODD EGNOR	4	14 OCT 2014	8 HR TCT WORKSHOP

Figure 8-26 Individual Training Record Report Screen

8.8.3 Individual Certifications Report

Run an Individual Certifications report to retrieve a list of certified and non-certified competencies associated with an individual. To run this report, perform the following steps:

1. In the TMT **Reports** menu, click **Certifications** under **INDIVIDUAL**.

   The Individual Certifications Report Criteria screen appears, similar to the following:

Figure 8-27 Individual Certifications Report Criteria Screen

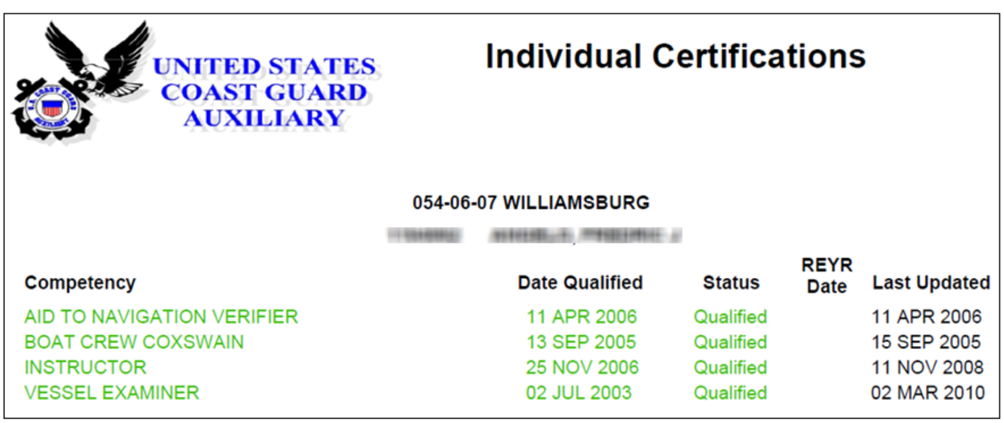
2. User either the **Search by Emp ID** or the **Search by Name** button to enter the individual's *{name}* in the **Name** field. These buttons activate a **List of Values** from which the individual's *{name}* is selected.

   The {name} *appears in the* ***Name*** *field.*

3. Use the **Report Format** list box to select a *{report format}* (**CSV** or **PDF**).

4. Click **Submit**.

   The Individual Certifications report, similar to the following (shown in PDF format), opens in a separate browser window:



UNITED STATES COAST GUARD AUXILIARY

Individual Certifications

054-06-07 WILLIAMSBURG

Competency	Date Qualified	Status	REYR Date	Last Updated
AID TO NAVIGATION VERIFIER	11 APR 2006	Qualified		11 APR 2006
BOAT CREW COXSWAIN	13 SEP 2005	Qualified		15 SEP 2005
INSTRUCTOR	25 NOV 2006	Qualified		11 NOV 2008
VESSEL EXAMINER	02 JUL 2003	Qualified		02 MAR 2010

Figure 8-28 Individual Certifications Report

8.8.4 Unit Training Status Report

Run a Unit Training Status report to retrieve the training status of all individuals at a unit. Subunits may also be included in the report. To run this report, perform the following steps:

1. In the TMT **Reports** menu, click **Training Status** under **UNIT**.

   The Unit Training Status Report Criteria screen appears, similar to the following:

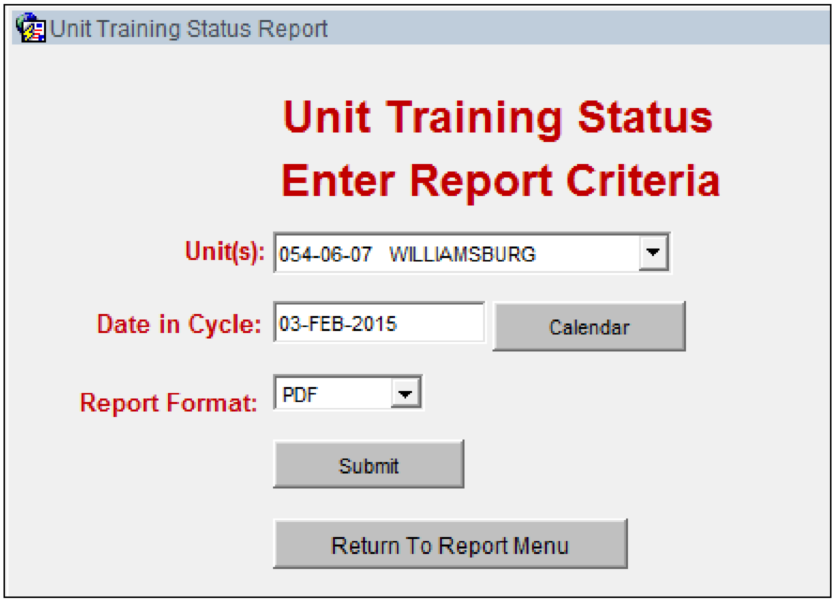


Figure 8-29 Unit Training Status Report Criteria Screen

2. Use the **Unit(s)** list box to select the *{unit(s)}* to be covered by the report. Users also have the option to include all subunits in the report.
3. Use the **Calendar** button to define the {**Date in Cycle**} for the report.

NOTE: *If the {**Date in Cycle**} is earlier than 2007, the report is displayed in terms of currency rules in effect in 2006. If the {**Date in Cycle**} is 2007 or beyond, the report data reflects 2007 currency requirements.*

4. Use the **Report Format** list box to select a *{report format}* (**CSV** or **PDF**).
5. Click **Submit**.

   The Training Status Unit Report, similar to the following (shown in PDF format), opens in a separate browser window:

Training Status Unit Report

UNITED STATES COAST GUARD AUXILIARY

013-12 SOUTH SHORE DIVISION
Date in Cycle 10 MAR 2015

Employee ID [redacted] **Full Name** [redacted]

Competency BOAT CREW CREWMEMBER
Currency of Competency CERTIFIED

Task	Current	# Complete	# Req'd	Cycle	Due Date
1 HR TCT REFRESHER WORKSHOP	P		1	A(C)	31-DEC-2015
BOAT CREWMEMBER U/W HOURS	P		12	A(C)	31-DEC-2015
(BCM) QE APPROVAL	Y	1	1	3-A(C)	31-DEC-2017
4/8 HR TEAM COORDINATION TRAINING WORKSHOP	Y	1	1	5-A(C)	31-DEC-2016
ICS100 - INTRODUCTION TO ICS ON LINE	Y	1	1	P	Permanent
IS-700 INTRO TO NATIONAL INCIDENT MANAGEMENT SYSTEM	Y	1	1	P	Permanent

Employee ID [redacted] **Full Name** [redacted]

Competency INSTRUCTOR
Currency of Competency CERTIFIED

Task	Current	# Complete	# Req'd	Cycle	Due Date
ACTUAL INSTRUCTOR HRS--0 L and 0 NL	P			A(C)	31-DEC-2015
INSTRUCTOR QUALIFICATION COURSE	Y	1	1	P	Permanent

KEY: "Cycle" field: (C) Calendar - Due Date based on Jan 1st calendar year, (S) Sliding - Due Date based on date last completed
"Current" field: Y - Yes = Current Cycle Requirements Completed: W - Waived = Related Task is due in Current Cycle
P - Pending = Previous Cycle Completed & Current Not Yet Completed
(Sliding tasks with a 12 month or less frequency will show as P during the last 60 days before they expire.)
(Sliding tasks with a frequency greater than 12 months will show as P during the last 365 days before they expire.)
N - No = Previous & Current Cycle Not Yet Completed

Report run on:March 10, 2015 1:13 PM Page 1

Figure 8-30 Training Status Unit Report Screen

NOTE: *This report lists tasks by competency, and a color-coding scheme is used to indicate the status of all listed tasks. The report key shown at the bottom of Figure 8-30 explains the color-coding scheme.*

8.8.5 Unit Training Record Report

Run the Unit Training Record report to retrieve training records for individuals in a unit within a defined period. Subunits may also be included in the report. To run this report, perform the following steps:

1. In the TMT **Reports** menu, click **Training Record** under **UNIT**.

   The Unit Training Record Report Criteria screen appears, similar to the following:

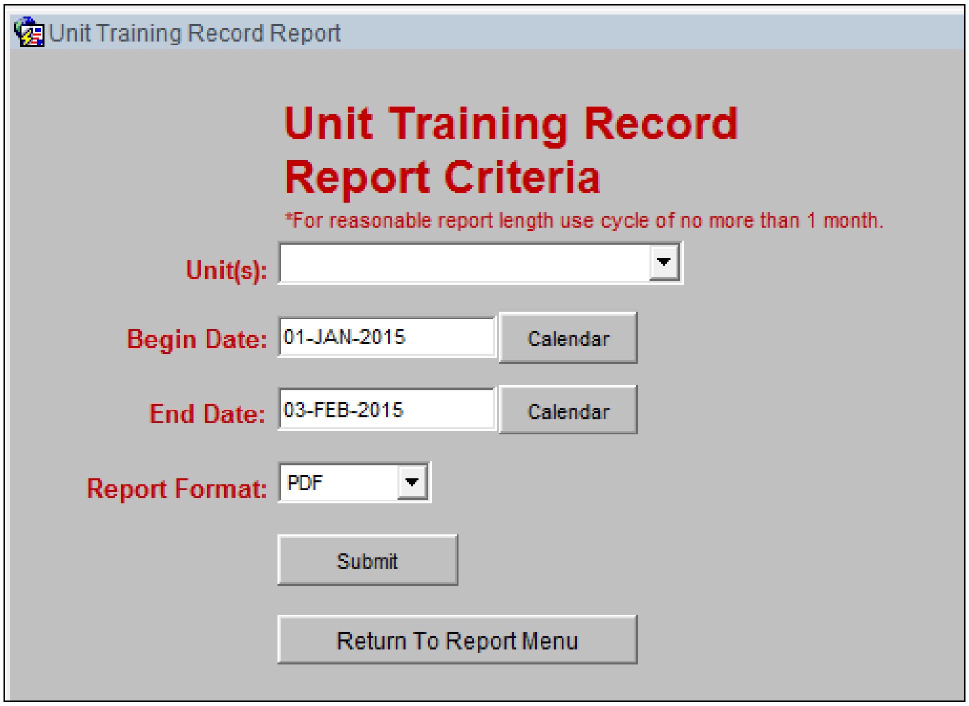


Figure 8-31 Unit Training Record Report Criteria Screen

2. Use the **Unit(s)** list box to select the `{unit(s)}` to be covered by the report. Users also have the option to include all subunits in the report.
3. Use the **Calendar** buttons to define a `{begin date}` and an `{end date}` for the report.
4. Use the **Report Format** list box to select a `{report format}` (**CSV** or **PDF**).
5. Click **Submit**.

   The Unit Training Record Report, similar to the following (shown in PDF format), opens in a separate browser window:

UNITED STATES COAST GUARD AUXILIARY

Unit Training Record Report

013-12 SOUTH SHORE DIVISION

Begin Date: 01 JAN 2015 **End Date:** 10 MAR 2015

Full Name: [redacted] **Unit Number:** 0131203

Task	Instructor	Duration (hrs)	Completion Date	Remarks
CIVIL RIGHTS AWARENESS (502319)	BELL W		04 JAN 2015	ROSTER SUBMITTED FOR ENTRY
INFLUENZA TRAINING (502290)	BELL W		04 JAN 2015	ROSTER SUBMITTED FOR ENTRY
PRIVACY AWARENESS (810015)	BELL W		04 JAN 2015	ROSTER SUBMITTED FOR ENTRY
SECURITY EDUCATION AND TRAINING AWARENESS (810030)	BELL W		04 JAN 2015	ROSTER SUBMITTED FOR ENTRY

Full Name: [redacted] **Unit Number:** 0131205

Task	Instructor	Duration (hrs)	Completion Date	Remarks
CIVIL RIGHTS AWARENESS (502319)	BELL W		04 JAN 2015	ROSTER SUBMITTED FOR ENTRY
INFLUENZA TRAINING (502290)	BELL W		04 JAN 2015	ROSTER SUBMITTED FOR ENTRY
PRIVACY AWARENESS (810015)	BELL W		04 JAN 2015	ROSTER SUBMITTED FOR ENTRY
SECURITY EDUCATION AND TRAINING AWARENESS (810030)	BELL W		04 JAN 2015	ROSTER SUBMITTED FOR ENTRY

Full Name: [redacted] **Unit Number:** 0131205

Task	Instructor	Duration (hrs)	Completion Date	Remarks
ETHICS TRAINING (502306)			02 JAN 2015	AUXLMS Record inserted on 07-JAN-15

Report run on: March 10, 2015 1:21 PM

Page 1

Figure 8-32 Unit Training Record Report

8.8.6 Unit Certifications Report

Run a Unit Certifications report to retrieve a record of certified and non-certified competencies associated with individuals at a unit. Subunits may also be included in the report. To run this report, perform the following steps:

1. In the TMT **Reports** menu, click **Certifications** under **UNIT**.

   The Unit Certifications Report Criteria screen appears, similar to the following:

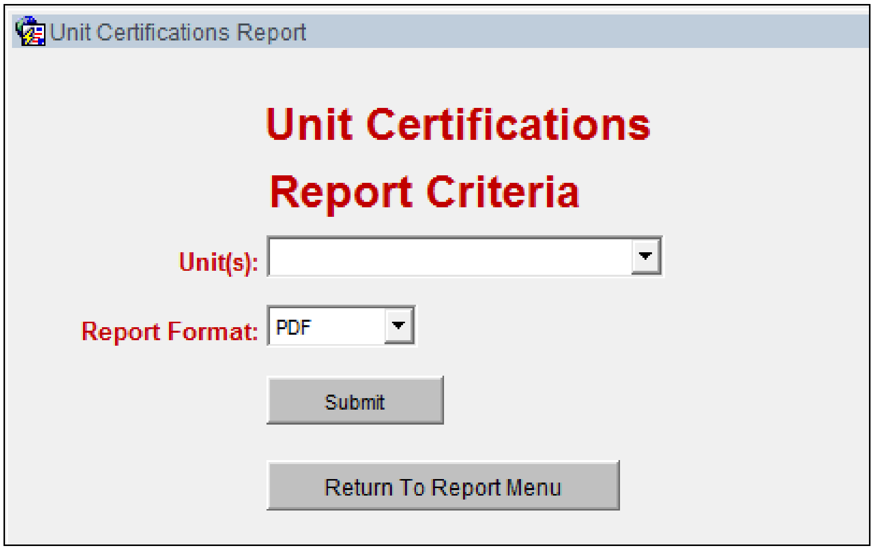


Figure 8-33 Unit Certifications Report Criteria Screen

2. Use the **Unit(s)** list box to select the `{unit(s)}` to be covered by the report. Users also have the option to include all subunits in the report.
3. Use the **Report Format** list box to select a `{report format}` (**CSV** or **PDF**).
4. Click **Submit**.

The Unit Certifications report, similar to the following (shown in PDF format), opens in a separate browser window:


UNITED STATES COAST GUARD AUXILIARY

Unit Certifications

054-06-07 WILLIAMSBURG

Name:

Unit Number: 054-06-07

Competency	Date Qualified	Status	REYR Date	Last Updated
AID TO NAVIGATION VERIFIER	11 APR 2006	Qualified		11 APR 2006
BOAT CREW COXSWAIN	13 SEP 2005	Qualified		15 SEP 2005
INSTRUCTOR	25 NOV 2006	Qualified		11 NOV 2008
VESSEL EXAMINER	02 JUL 2003	Qualified		02 MAR 2010

Name:

Unit Number: 054-06-07

Competency	Date Qualified	Status	REYR Date	Last Updated
AID TO NAVIGATION VERIFIER	24 MAR 2007	Qualified		25 JUN 2007

Figure 8-34 Unit Certifications Screen

8.8.7 Unit Training Management Report

Run a Unit Training Management report to display the currency status of unit members in regard to competencies and tasks. The report shows the unit's task currency information in the following sort sequence:

- Competency
- Tasks assigned to the competency
- Frequency with which the task must be performed to remain current

- Member name.

Color-coding graphically indicates an individual's currency status on each task. Specifically, the report, in PDF format, displays task completion dates in different background colors to denote different currency statuses. Currency statuses include the following:

- Current
- Current but within three to six months of expiration
- Current but within two months of expiration
- Expired/overdue.

Similarly, a color-coded background behind the member's name signifies whether the individual's certification status is REYR (Recertification for Failure to Meet Yearly Requirements) or REWK (Recertification Required for Failure to Attend Required Workshop).

To generate this report, perform the following steps:

1. In the TMT **Reports** menu, click **Training Management** under **UNIT**.

   The Unit Training Management Report Criteria screen appears, similar to the following:

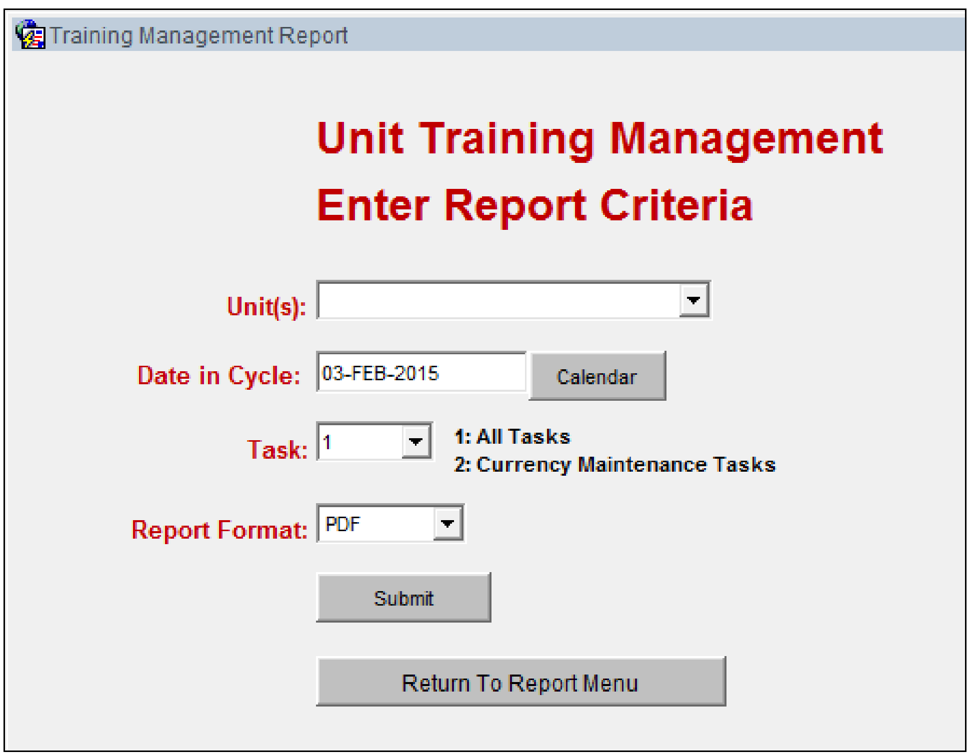


Figure 8-35 Unit Training Management Report Criteria Screen

2. Use the **Unit(s)** list box to select the *{unit(s)}* to be covered by the report.
3. Use the **Calendar** button to select a {**Date in Cycle**} for the report.
4. At the **Task** list box, select one of the following options: **1: All Tasks** or **2: Currency Maintenance Tasks**.

NOTE: *PDF is currently the only report format available because of the extensive color-coding displayed in the report.*

5. Click **Submit**.

   The Unit Training Management report, similar to the following, opens in a separate browser window:

Training Management
054-06-07 WILLIAMSBURG
Date in Cycle: 03-FEB-2015

Competency **AID TO NAVIGATION VERIFIER**

	Task	ICS100 - INTRODUCTION TO ICS ON LINE	IS-700 INTRO TO NATIONAL INCIDENT MANAGEMENT SYSTEM
	Frequency	Permanent	Permanent
Name		Completed	Completed
[illegible]		14-MAR-2006	13-MAR-2006
[illegible]		20-AUG-2006	20-AUG-2006
[illegible]		24-NOV-2009	08-DEC-2009
[illegible]		17-JAN-2006	27-FEB-2006
[illegible]		23-MAY-2006	17-APR-2006
[illegible]		25-JAN-2006	17-APR-2006
[illegible]		07-MAR-2009	08-APR-2009

Competency **AID TO NAVIGATION VERIFIER - PQS**

	Task	1 HR TCT REFRESHER WORKSHOP	4/8 HR TEAM COORDINATION TRAINING WORKSHOP	COMPLETED AIDS TO NAVIGATION VERIFIER PQS	ICS100 - INTRODUCTION TO ICS ON LINE	IS-700 INTRO TO NATIONAL INCIDENT MANAGEMENT SYSTEM
	Frequency	Annual	Five Years	Permanent	Permanent	Permanent
Name		Completed	Completed	Completed	Completed	Completed
[illegible]		WAIVED	10-APR-2010	04-FEB-2014	24-NOV-2009	08-DEC-2009

Figure 8-36 Unit Training Management Report

NOTE: *The report displays color keys (not shown in Figure 8-36) for all color-coding used to depict task currency status and certification status (REYR or REWK).*

9. SECURITY

All USCG Auxiliary members are required to complete a Security Central Users (SECCEN) Personnel Security Questionnaire upon application to the Auxiliary. Members will retain an "Applicant" status until all security requirements are met. Applicants will be designated either Direct Operations (DO) or Operational Support (OS), depending on the competencies in which they are certified.

AUXDATA allows data entry, maintenance, and reporting of security investigation data for USCG Auxiliary members. This section describes how to use the Security forms in AUXDATA when processing security investigations for existing and new members.

9.1 Accessing the Security Forms

The security forms are available only to users who have been assigned DIRAUX and SECCEN user roles. Having either of these roles allows the user to see the **Security** button at the top-center of the AUXDATA main menu.

The **Security** button appears either green or red. A green **Security** button indicates no security action is necessary, although the user may still open the **Security** tab. A red **Security** button (as shown in Figure 10-1) indicates security action is necessary. To determine the nature of a required security action, click the **Security** button, and then open the **Security** tab.

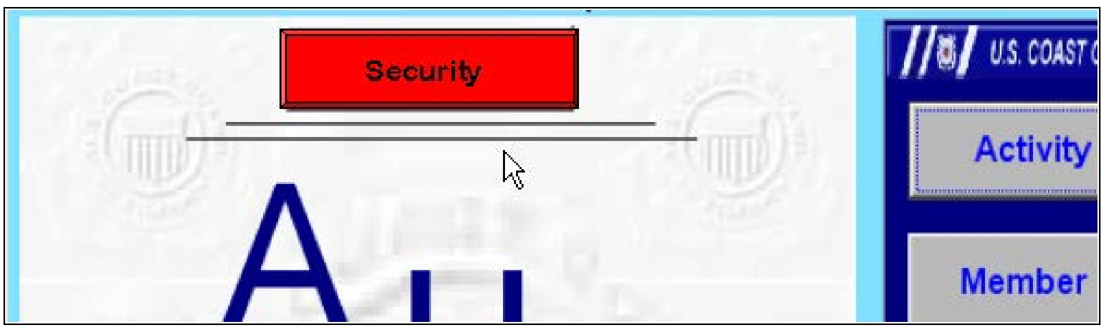


Figure 9-1 Security Button

9.2 Security Tab

Both the DIRAUX and SECCEN users utilize the **Security** tab.

- The DIRAUX user completes/updates the initial security information and indicates, in the Security tab, when the security paperwork is ready for the SECCEN to begin processing.
- The SECCEN user completes work and indicates in the **Security** tab that additional DIRAUX action is required, for example, to update a member's status.

The **Security** tab uses a system of colored buttons to indicate when DIRAUX and SECCEN action is required. When a button is red, user action is required. When a button is green, no action is required. Generally, clicking on a red button generates an on-screen listing of members requiring action.

The following sections describe how the DIRAUX and SECCEN use the **Security** tab.

9.2.1 DIRAUX User

This section describes how the DIRAUX user updates a security record for a member in AUXDATA. To display the **Security** tab, start at the main AUXDATA menu and click **Security**.

*The **Security** tab appears, similar to the following:*

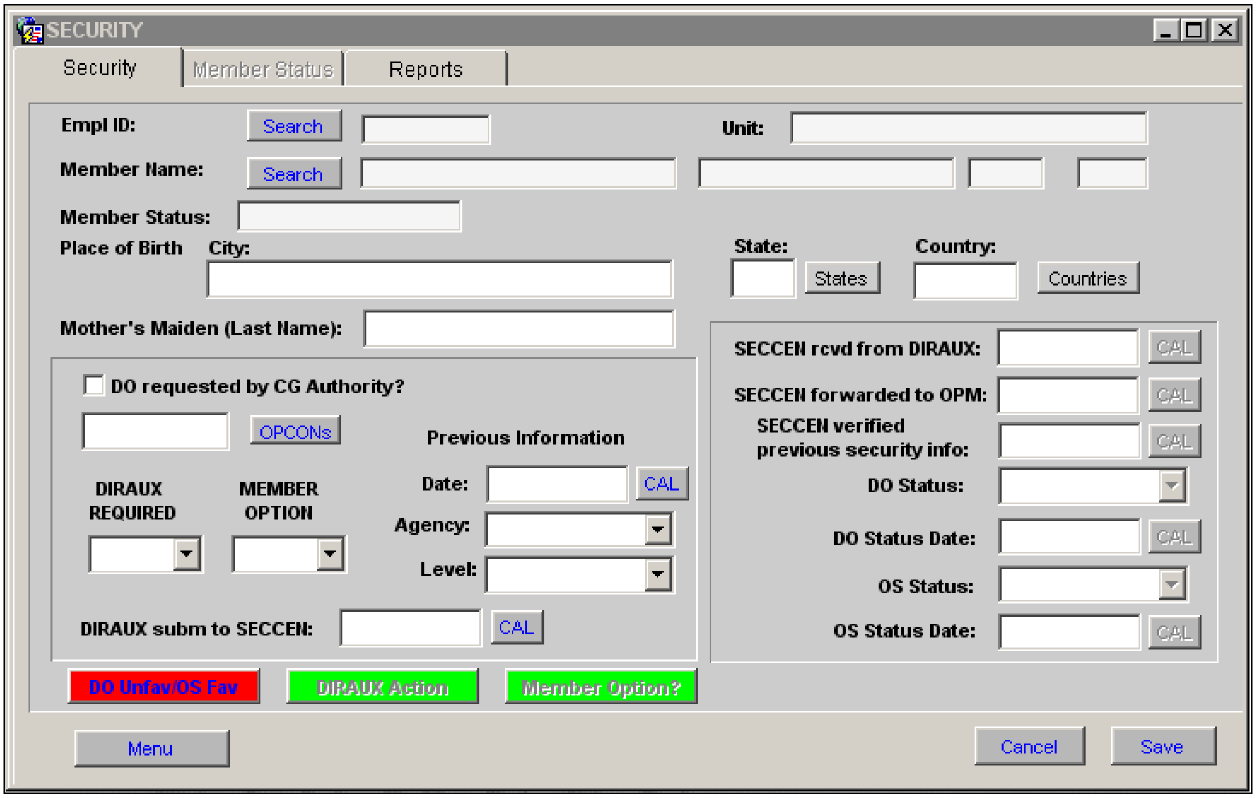


Figure 9-2 DIRAUX View of Security Tab

NOTE: *The three colored buttons shown in Figure 9-2 are visible only to a user assigned the DIRAUX role, because these buttons relate only to DIRAUX actions.*

To complete the DIRAUX section of the form, perform the following steps:

1. If the user intends to update the record of a specific member, use the **Search** function to find the member's `{security record}`.
   - Click **Search** for **Empl ID** or **Member Name** to launch a **List of Values** displaying all members within the member's district.
   - If necessary, use the wildcard search function to narrow the list of members.
   - Select the `{desired member}` from the **List of Values** by double-clicking the `{name/ID}`. (Alternatively, click the `{name/ID}` to select it, and then click **OK**.)

   *The member's **Security** tab record appears.*

2. To generate a list of members requiring DIRAUX processing, click any of the three buttons described in Table 9-1 if the button is red.

NOTE: *A* ***red*** *button indicates DIRAUX action is required. When a button is* ***green****, no DIRAUX action is required. Clicking a green button generates no list because no DIRAUX actions are required.*

Table 9-1 Security Tab Action Buttons

Click Button…	Generate List of…	Take Required Action to…
DO Unfav/OS Fav	Existing members who received a DO unfavorable and an OS favorable security investigation	On **Security** tab, set **DIRAUX Required** and **Member Option** fields to **OS**.
DIRAUX Action	Pending members for whom SECCEN has provided a DO or OS status, and … Existing members who received an OS unfavorable status from SECCEN	Update member status in accordance with SECCEN's security status information.
Member Option?	Members having incomplete **Member Option** field	Determine **Member Option** and select it on **Security** tab.

Clicking a red button generates a list of members requiring DIRAUX processing or other action.

3. In the list, click the member's `{name}` to populate the **Security** tab with the member's `{security information}`.
4. After retrieving a member's `{security record}`, complete/update the personal information fields, such as **Place of Birth**, and so forth. If the member appears on one of the lists described in Table 9-1, complete the required action.
5. Complete the fields in the bottom left block:
   - Check the **DO requested by CG Authority?** check box if the member is expected to be designated DO in the future and his/her designation currently displays as OS in the **DIRAUX Required** field.
   - If the member had a security investigation in the past, complete the **Previous Information** fields.
   - Finally, enter the `{date}` in the **DIRAUX subm to SECCEN** field to notify the SECCEN that the member is ready for him/her to process.
6. Click **Save**.

9.2.2 SECCEN User

This section describes how the SECCEN user updates a security record for a member in AUXDATA. To display the **Security** tab, start at the main AUXDATA menu and click **Security**.

The ***Security*** *tab appears, similar to the following:*

NOTE: *In the example, the DIRAUX has completed the left side of the form. The dashed red line indicates fields to be completed by the SECCEN user. The red* ***SECCEN*** *button indicates that other members are ready for SECCEN processing.*

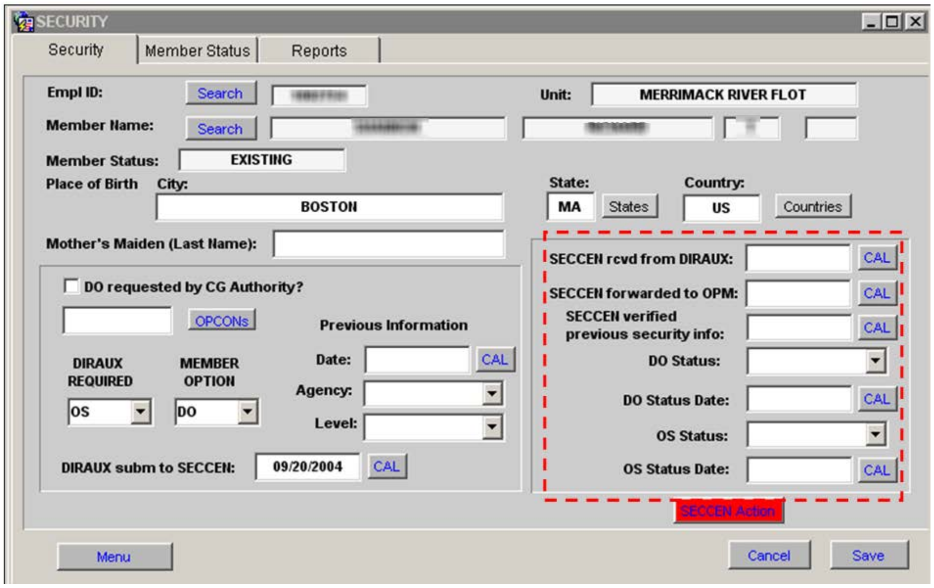


Figure 9-3 SECCEN View of Security Tab

NOTE: *The* ***SECCEN Action*** *button is visible only to users assigned the SECCEN role. Conversely, the three-colored DIRAUX action buttons are not visible to a user granted only the SECCEN role.*

To complete the SECCEN portion of the **Security** tab, perform the following steps:

1. If the user intends to update the record of a specific member, use the **Search** function to find the member's `{security record}`.
   - Click **Search** for **Empl ID** or **Member Name** to launch a **List of Values** displaying all members within the member's district.
   - If necessary, use the wildcard search function to narrow the list of members.
   - Select the `{desired member}` from the **List of Values** by double-clicking the `{name/ID}`. (The user can also click the `{name/ID}` to select it, and then click **OK**.)

   The member's ***Security*** *tab record appears.*

2. To generate a list of members requiring SECCEN action, click the red **SECCEN Action** button.
   - The button generates a list of members requiring SECCEN action.
   - In the list, click a member's `{name/ID}` to select it.

   The member's ***Security*** *tab information appears, similar to Figure 9-3.*

3. Complete the fields in the bottom right block (fields outlined in red shown in Figure 9-3).
4. Click **Save**.

9.3 Member Status

Use the **Member Status** tab to view information on a selected member, such as current certified competencies, and to update a member's status and the unit to which he/she is assigned. The **Member Status** tab appears similar to the following:

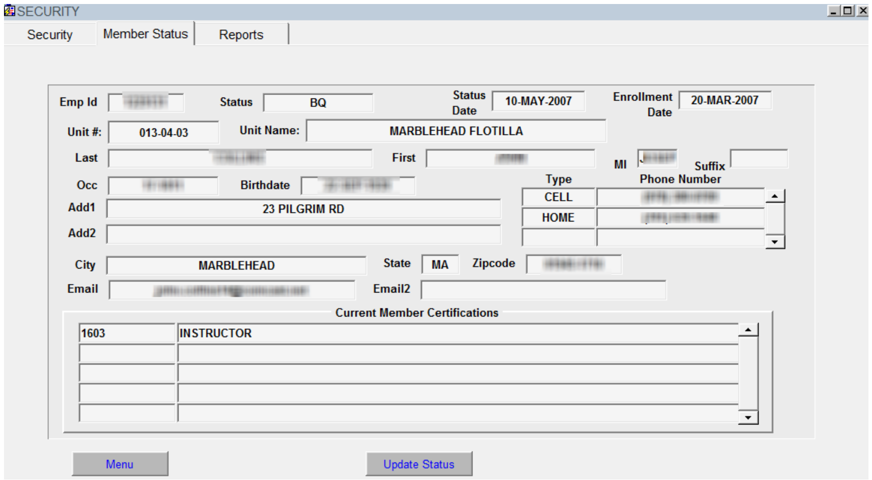


Figure 9-4 Member Status Tab

9.3.1 Updating a Member's Status

Only DIRAUX users can update a member's status. To update a member's status after the SECCEN has indicated either a DO or OS status, perform the following steps:

1. Click **Update Status**.

The Update Member Status screen appears, similar to the following:

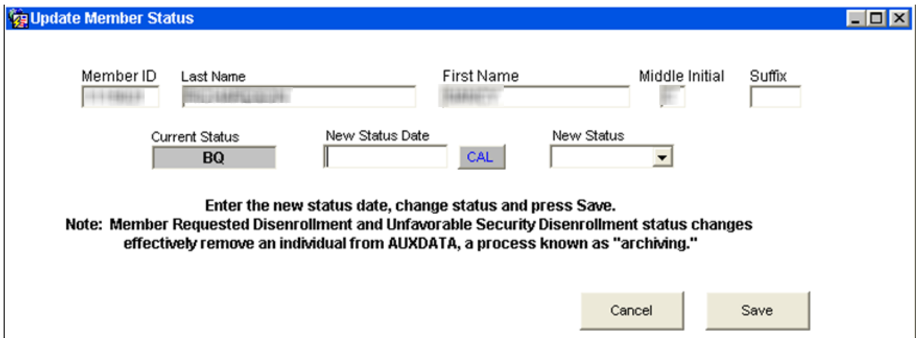


Figure 9-5 Update Member Status Screen

2. Enter a `{new status date}`, and then select a `{new status}` from the **New Status** list box.
3. Click **Save**.

9.4 Security Reports

The **Reports** tab of the main Security screen takes the user to the security **Reports** menu, from which the Security Tracking report and the DO Unfavorable report may be launched.

9.4.1 Security Tracking Report

Run a Security Tracking report to retrieve member security data entered through the Security screen and to determine member security status. To run this report, perform the following steps:

1. At the main Security screen, click the **Reports** tab.

*The **Reports** menu appears, similar to the following:*

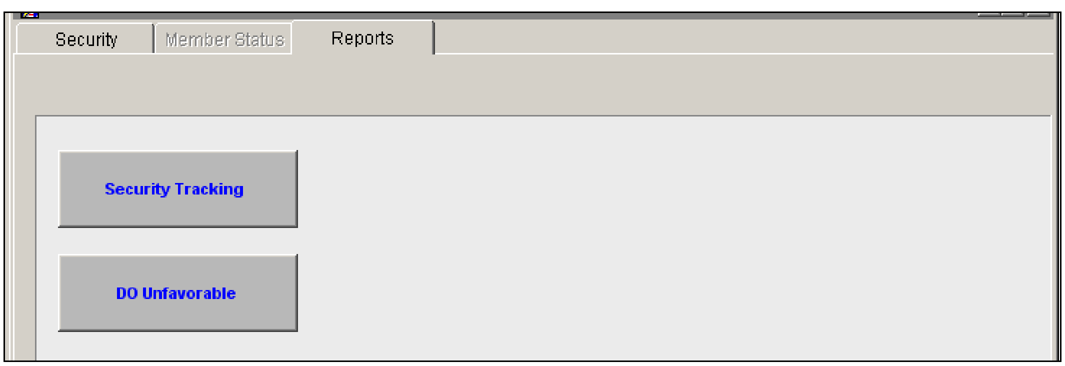


Figure 9-6 Reports Menu

2. In the **Reports** tab, click **Security Tracking**.

The Security Tracking Report selection (parameters) screen appears, similar to the following:

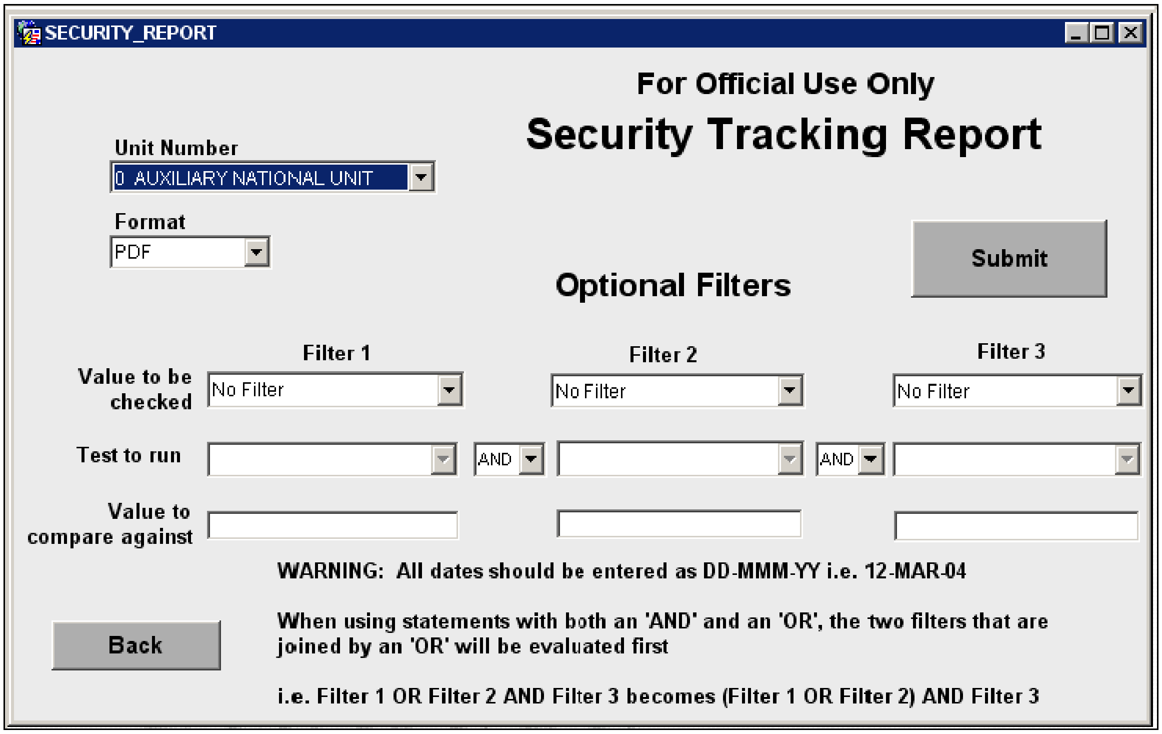


Figure 9-7 Security Tracking Report Selection Screen

3. Select the `{unit}` from the **Unit Number** list box in the top left of the screen. For district-level users, only the user's district appears in the **Unit Number** menu. For national-level users, all units are available from the **Unit Number** menu, including the national unit and all district-level units.

4. Use the **Format** list box to select the `{report format}` (**PDF** or **CSV**).

5. The selection screen provides three filters to define the criteria for selecting member records to appear in the Security Tracking report. Use **Filter 1** to define the first selection criterion. Select the `{item}` to be filtered (**Last Name**, for example) from the **Value to be checked** list box.

6. At the **Test to run** list box for **Filter 1**, select an `{option}` (for example, **Equals**). These options may vary with the particular **Value to be checked** selected in the previous step.

NOTE 1: *Selecting **Is Empty** as the **Test to run** returns only persons (member records) for whom that particular value is not filled in. Choosing **Is Empty** does not require a **Value to compare against** (Step 7).*

NOTE 2: *Selecting **Equals** returns only records where the **Value to be checked** equals the specified **Value to compare against**. When selecting **Equals**, the user must select a **Value to compare against** in Step 7.*

7. Enter the **Value to compare against** in the last box under **Filter 1**. For example, if the user selected **Last Name** as the **Value to be checked**, **Equals** as the **Test to run**, and **Smith** as the **Value to compare against**, the Security Tracking report would show security records for all members with the last name of Smith.

NOTE: *The data appearing in the sample Security Tracking report (Figure 10-8) illustrates values (and data formats) that could be entered in the* ***Value to compare against*** *drop-down.*

8. Use up to two additional filters (**Filter 2** and **Filter 3**) to further refine the record selection criteria, if desired. Complete these filters in the same manner as **Filter 1**.
9. When using more than one filter, select from the **And/Or** list box between the filters. Selecting **Or** between two filters returns member records that satisfy *either* of the two filter criteria. Selecting **And** returns member records that satisfy *both* criteria.

NOTE: *When all three filters are combined with both* ***And*** *and* ***Or*** *connectors, the two filters that are joined by* ***Or*** *are evaluated first in selecting member records to appear in the report.*

10. Click **Submit**.

The Security Tracking report appears, similar to the following:

NOTE: *Reports open in an internet browser window. See Figure 7-2 and its preceding note for an explanation about how to view the window with the report.*

UNITED STATES COAST GUARD AUXILIARY

For Official Use Only

Security Tracking Report

013 FIRST DISTRICT NORTHERN REGION

UNIT NO	EMPLID	LAST NAME	FIRST NAME	MI	DIR REQD	MBR RQST	DIR SUBM	SEC RCVD	SEC FWD OPM	OS STAT DATE	OS STAT	DO STAT DATE	DO STAT	DI STAT DATE	DI STAT	PREV DATE	PREV AGENCY	PREV LEVEL
013-01-01	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	12-APR-12	18-APR-12	26-JUL-12	02-AUG-12	FAV							
013-01-01	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	27-APR-05		03-MAY-05	19-MAY-05	FAV							
013-01-01	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	02-JUN-06		19-JUN-06	27-JUN-06	FAV							
013-01-01	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	01-JUN-05		09-JUN-05	13-JUL-05	FAV							
013-01-01	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	24-MAY-06		15-JUN-06	22-JUN-06	FAV							
013-01-01	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	24-MAY-06		15-JUN-06	22-JUN-06	FAV							
013-01-02	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	12-JUN-06		12-JUL-06	18-JUL-06	FAV							
013-01-02	[illegible]	[illegible]	[illegible]	[illegible]	DO	DO	14-NOV-12	19-NOV-12	21-NOV-12	20-SEP-12	FAV	09-JAN-13	FAV					
013-01-02	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	17-JUL-13			18-DEC-13	FAV							
013-01-02	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	24-MAY-06		14-JUN-06	22-JUN-06	FAV							
013-01-02	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	04-OCT-07		17-OCT-07	23-OCT-07	FAV							
013-01-02	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	15-NOV-11	18-NOV-11	19-MAR-12	25-MAR-12	FAV							
013-01-02	[illegible]	[illegible]	[illegible]	[illegible]	OS	OS	17-MAY-06		08-JUN-06	21-JUN-06	FAV							

Figure 9-8 Security Tracking Report Screen

9.4.2 DO Unfavorable Report

The DO Unfavorable report displays members who received an Unfavorable result on a security investigation, along with any competencies removed because of the security investigation. The report is sorted first by unit, then by member within unit.

To generate the report, perform the following steps:

1. At the main Security screen, click the **Reports** tab.

The ***Reports*** *tab opens, displaying the security reports available.*

2. In the **Reports** tab, click **DO Unfavorable**.

The DO Unfavorable report appears, similar to the following:

UNITED STATES COAST GUARD AUXILIARY

Members Set to DO Unfavorable and Competencies Removed (If Any)

As of: March 10, 2015 2:04 PM

UNIT #	EMPL ID	LAST NAME	FIRST NAME	COMPETENCY	STATUS
013-01-08	[illegible]	[illegible]	[illegible]		
013-04-06	[illegible]	[illegible]	[illegible]		
013-09-03	[illegible]	[illegible]	[illegible]		
013-09-07	[illegible]	[illegible]	[illegible]	BOAT CREW CREWMEMBER	NOT CERTIFIED SECURITY
014-01-06	[illegible]	[illegible]	[illegible]		
014-05-10	[illegible]	[illegible]	[illegible]		
014-10-01	[illegible]	[illegible]	[illegible]		

Figure 9-9 DO Unfavorable Report

NOTE: *The report does not produce real-time data. Data is generated from a nightly run, which also rescinds any competencies granted members having a DO Unfavorable security investigation.*