

**US COAST GUARD AUXILIARY
AUXDATA / AUXINFO AUX-10 COURSE
SO/FSO-IS LEVEL TRAINING**

**REFERENCE MATERIALS: (All are posted on AUX-10 Web Site –
URL: <http://aux10.auxservices.org>)**

A: AUXDATA USER GUIDE dated JANUARY 2008

B: AUXINFO USER GUIDE dated January 2007

C: Terminology for AUXINFO dated JANUARY 2004

D: Mission Category List by Resource dated 1 January 2008

E: Cross Reference Mission to Resource List dated 1 January 2008

FIRST AND SECOND DAY - 0800-1700

INTRODUCTION

- INSTRUCTORS and STUDENTS
- AUXDATA is a password protected system used to enter all of the data pertaining to individuals, facilities, certifications, awards, and performance hours, etc.
- AUXINFO is used to retrieve all information except the personal information of the members and is accessed directly from the internet, no password required.
- KNOW SO-IS DUTIES (Flotilla and Division Admin Procedures Guides and letter of Appointment from your elected leader)
- AUXDATA FORMS
 - Where to find the forms (<http://forms.cgaux.org>)
 - Define Missions and forms to use.
 - Mission 99 – 7029 - All missions not reported on another form
 - Major Missions – 7030 - Public Affairs, Public Education, CG Support (Ops & Admin), Marine Safety and Environmental, Aids to Navigation, Member Training, Operational Missions performed with Air, Boat, and Radio facilities. and Recruiting.
 - Mission 06A or 06B – 7039 – Workshop Reporting (Dual purpose, reports the instructor MT & Aide hours and gives student credit for attending a workshop)
 - Missions 91A & B – 7038 - All Vessel Safety Checks and Facility Inspections (Members must be certified)
 - Missions 91C, D, & G- 7038 – All Marine Safety Exams (CFV, UPV, & UTV) (Members must be certified and on orders. Requires an OPCON)
 - Mission 11 – 7046 – All RBS Program Visits (Members must be certified)
 - Proper form completion (A ppp available for Flotilla Meeting Training topic is available on the AUX-10 website to download.)
- Which forms are NOT used for AUXDATA entries by the FSO/SO-IS. (New Member Applications, Facility Inspections, Qualifications, Security, and requests for Re-imbusement.)

NOTE TO INSTRUCTORS: Emphasize for students not to sign on the computer, but listen to what you are saying.

AUXDATA LIVE (Discuss each screen following the AUXDATA User Guide - Reference A) URL: <http://auxdata.uscg.gov>

- Opening AuxDATA Screen – (Ref A pg 5)
- Production Database / Training Database - (Ref A pg 6)
- Web Connection to CITRIX – (Ref A pg 6)
- Downloading / Installing CITRIX Client - (Ref A pg 6)
- Downloading / Installing Jlnitiator Plug-in -(Ref A pg 6)

NOTE: Try JAVA, you will not have to load either CITRIX or Jlnitiator.

- Monitor “Release Notes” (Scroll down on AUXDATA opening page almost to the bottom. It shows latest version of AUXDATA, and the date last updated with a link to the explanation of the changes in a Word Document. Ref A pg 7)

LOGON ACCESS SCREEN - (Ref A pg 8)

- User Name / Password Assignment / Access Privileges
- SECURITY – Personalizing Your Password

AUXDATA MAIN MENU - (Ref A pg 9)

- Activity Logs Module – Used by FSO/SO-IS to enter data.
- Member Status Module – Used by DIRAUX to enter new members. FSO/SO-IS may change members name, address, e-mail, spouse, emergency data, Patriot readiness information. Members with read only may change their own information.
- Resource Status Module – DIRAUX enters new Flotillas and Divisions, and all Facilities. FSO/SO-IS enter all new/change of officers.
- Reports Module – Retrieve any of the reports for level of access.
- Training – Retrieve any of the reports for level of access.
- EXIT – Use this button and not the red X in upper right when you are finished.

ACTIVITY LOGS MODULE - (Ref A pg 11)

- RESOURCE BUTTON
 - CHOOSE THE PROPER RESOURCE – Unit / Boat / Aircraft / Radio
 - Defaults to “UNIT”
 - Coxswain must provide BOAT Registration/Documentation number and NOT Call Sign; pilot must provide AIRCRAFT Tail Number [Vessel call signs may be a little different in each district and are not used in AUXDATA].
 - Radio Operator must provide RADIO District Identifier – NM8 OR NF8, followed by 2 or 3 Alpha Letters – NOT Radio Call Sign (May vary by district)
N = Radio
M = Land Mobile Unit
F = Fixed Land Unit
- | | |
|--------|--------|
| NM8WAA | NM11AA |
| NF8WAA | NF11AA |

ACTIVITY LOGS SCREEN (Ref A pg 11)

The following reference pages are the key to accurate AUXDATA input. PLEASE use them for each entry in conjunction with the List of Values Pick List button.

MISSION CATEGORY LISTING IN RESOURCE ORDER - (Ref D)

MISSION CATEGORY LIST CROSS REFERENCE - (Ref E)

Activity Logs Buttons Descriptions – (Ref A pg 12)

- List Of Values (Pick List Choices)
- Copy Activity (Copies the highlighted Activity)
- Copy W/Crew – [big time saver] (Copies the highlighted Activity and the Crew Assignment also. It does not copy the Activity Log Details data.)
- Create Activity – (Creates a blank line to enter new activity.)
- Delete Activity – (After saving an activity, you can delete it. Unless saved you cannot delete it.)
- Start Date Local (Sorted in date sequence)
- Date Created (Sorted in date entered into system)
- Remarks (Optional: For Unit Missions, I use name of member. For MT missions the class/chapter taught. For PE I use chapter taught. This does not print anywhere.)

NOTE: EOM Entries for all air, boat, and radio missions require an EOM. (important to only show one EOM per 7030 being reported. If a transaction requires more than one EOM and the dates/times are not keyed correctly the time may result with a minus sign in front of the hours when you look at the Mission Detail Report.)

ACTIVITY LOG DETAILS SCREEN – (Ref A pg 12 - Operational Resource Shown)

- Enter applicable information for the Activity/Mission being entered. (Ops, SAR, or ATON)
- Complete according to type Activity/Mission, e.g. VSC, PV, PE, PA, etc.
 - Different fields open up depending on mission type entered. Complete all fields available except Location which is optional. Location does not appear on any report.

CREW ASSIGNMENT SCREEN – (Ref A pg 12)

- Filter Button
- Your Unit and Subordinate Units Button
- Select Flotilla Button
- Search for Person Button
- Assigning Crew From a Different Division
- Assigning Crew Positions – LEAD / NON-LEAD / TRAINEE –
- SAVE Button

TASKS SCREEN– (Ref A pg 13) (May vary by Districts-SO/FSOs-IS may enter the annual workshops (mandatory or non-mandatory).)

- Use the TASKS Screen for UNIT Resource Missions – Primarily Member Training to enter mandatory Workshop Attendance Reports and only Air Missions that have an Instructor Pilot/Flight Examiner on board doing an annual flight check.
- Other annual air tasks are not to be entered by SO/FSO-IS. They are entered by either DIRAUX, DSO-IS, ADSO-AV, or someone designated by the Air Squadron.

TASK CAPTURE – (Ref A pg 14)

- UNIT Resource Missions for entering Workshops
 - Top Section - Type in Instructor and total hours of Workshop
 - Bottom Section - Move all listed (instructors, aides, and students from left to right.

EXERCISES for instructor to make entries and the students try to follow but do not spend too much time if there are members that cannot keep up with the class. The instructors can then spend one-on-one time helping those that need help during the Hands-on time sessions.

- Mission 99 – 7029 - All missions not reported on another form

Exercise 1: Enter Mission 99 from sample form section and then have students enter. Limit time to 5 minutes for students to enter. (Sample Page #23)

Exercise 2: Enter a PA mission. Limit time to 5 minutes.
(Sample Page #15)

Exercise 3: Enter a PE mission and an End of Course mission. Limit to 5 minutes. (Sample Page #10)

- Mission 06A or 06B – 7039 – Workshop Reporting (Dual purpose, reports the instructor MT & Aide hours and gives student credit for attending)

Exercise 4: Enter a Workshop for 1-hour TCT to show how to choose a Task and Task Capture Limit time to 10 minutes (Sample Page #11)

Exercise 5: Enter a mission for an Air Resource with an IP/FE check ride included. Limit to 10 minutes. (Sample Page #2)

HOW TO USE QUERY FUNCTION - (Ref A pg 10)

HOW TO USE ORACLE WILD CARD – (Ref A pg 10)

APPROVALS – (Ref A pg 14)

- Do Not Approve Entries Until End of Year/or you are sure they are correct.
- Entries are not retrievable 6 Months from date of Approval
- Entry must be “Unapproved” to Make Changes to Mission
- AUXDATA source documents are sent to the SO/FSO-IS for review, entry and approval – If the SO-IS does the data entry, they should return source documents to FSO-IS upon approval

MEMBER STATUS MODULE– (Ref A pg 15)

- UNIT Tab
- MEMBER Tab
- UPDATE BUTTON – (Only Active Button)- Update member records – i.e.: phone numbers / e-mail / address / name changes
- Deleting a phone number – has been made more simple now.
- Patriot Readiness Tab
- Emergency Contact Tab
- Member History Tab

Exercise 6 – 7028 - Enter a change of member information. Limit to approx 5 minutes.
(Sample Page #1.)

RESOURCE STATUS MODULE– (Ref A pg 17)

- UNIT Tab – Highlight Unit, and click on Facility or Officer Tab
- FACILITIES Tab – Read only cannot make any corrections. (DIRAUX entry)
- OFFICERS Tab - Enter new annual unit officer report, update/change an officer, or show a vacancy in an office. If an officer continues in office do not change the start date.

Exercise 7 – Demonstrate how to replace a new Officer name and date.

Hands-On Mission Entry Practice In Training Database (Limit to available hours, cover AUXINFO and devote the last half day to practice both AUXDATA input and AUXINFO practice reports whichever the student needs the most.) Students to enter the remaining sample forms in back of handout and instructors will answer all questions.

MISSION CATEGORY LIST IN RESOURCE ORDER - (Ref D)

MISSION CATEGORY CROSS REFERENCE LIST - (Ref E)

REPORTS MODULE– (Ref A pg 19)

(Not all of these reports are useful. Some are from the CG AOPS and we do not need. There are different procedures for downloading and printing reports in CITRIX than JINITIATOR.) Most useful reports:

- UNIT SUMMARY DATA – for growth awards you need the 31 December report each year. Use only for Membership data and number of members certified in each program. The hours are NOT accurate on this report and should be taken from AUXINFO. Unit Activities Cube for unit, and Member Activities Cube for individuals.
- ADDRESS AND FLOTILLA DATA (New Search function to find a member in the Auxiliary regardless of flotilla. This is the only report which shows past offices.)
- EMAIL DIRECTORY
- MEMBER ROSTER
- UNDERWAY RESOURCE HOURS
- RESOURCE BY FLOTILLA
- **MISSION DETAIL REPORT – Review for keying errors of all data input. (Check to see if Aircraft/Boat/Radio hours do not exceed 24 [if they do a EOM is missing])**
Check to insure all missions except UPE EOC have hours, member, and position shown. An EOC should not contain any crew assignment or hours.
All PA missions and all missions from ANSC 7029 (Mission 99) for all members should be LEAD as there are no certifications involved.)
- Selecting a Report – Use Start / End Date when default not desired
- CITRIX downloading Reports – .PDF or Delimited, SAVE to "A" Drive or C\$ on 'Client' [V:]
- Monthly Report Distribution – Get your officers a "Read Only" Password and let them pull their own reports.

TRAINING MODULE- Training Management Tool (Ref A pg 21)

- INDIVIDUAL (for one member only) or UNIT (for all members of Unit) Reports
 - Training Status Report
 - Training Record (If year is not changed, you only see current year records.)
 - Certifications
 - Training Management Report for Unit only
- Downloading Reports (Same as Reports Module above.)
- Monthly Report Distribution (Same as Reports Module above.)

(AUXINFO USER GUIDE - Reference B)
(TERMINOLOGY FOR AUXINFO - Reference C)
URL: <http://www.auxinfo.uscg.gov>

- Info downloaded from AUXDATA on a weekly basis – refreshes every Monday
 - Date of last refresh shown at top of page after you are in a Cube
 - Important to know the results you want to end up with
 - Know the defaults - whether you need to change
 - All years? Current year? Nest Years?
 - All hours? Lead Only? Non-Lead? Nest Hours?
 - Missions? VSC Count? RBSPV Count?
 - Total Unit? Each Member of Unit?
 - All facilities? Air only? Vessel Only? Radio Only? Unit Only?
 - Must learn and understand the “navigation” process
 - Use of AUXINFO as an additional "management" tool
 - Interpreting the information displayed
 - Downloading data from AUXINFO – .CSV or .PDF
 - Creating local "bookmarks"
 - Using Pre-Formatted Reports (Many districts have on web sites)
 - Practice Exercises posted on the AUX-10 Web Site
- Does anyone have problems or questions?

Third Day - 0800 - 1200

POMS:

Power point presentation showing the screens for the 'IS' Officer to download the 7030 forms from POMS. Or show POMS live.

Show how to complete the Request for Reimbursement Form DD-1351-2.

Hands On - Mission Entry Practice In Training Database or AUXINFO Reports (Devote the last half day to practice both AUXDATA input and AUXINFO practice reports which ever the student needs the most.) Students to enter any of the sample forms which they have not completed, or work on refining AUXINFO data to extract.

MISSION CATEGORY LIST IN RESOURCE ORDER - (Ref D)

MISSION CATEGORY CROSS REFERENCE LIST - (Ref E)

Answer any remaining questions.

HAND OUT CERTIFICATES OF COMPLETION and remind the students of the Post Class Assignment below.

POST CLASS ASSIGNMENT: Deadline 60 days

Read Only passwords will be issued to all who do not have one for the Production Database. The passwords used in class will be valid for you to use at home to enter data for their unit(s) for practice in the Training Database.

For FSOs-IS when your SO-IS is satisfied that you are correctly entering all data, they may request that your DSO-IS request a password for the Production Database.

Your DSO-IS should request the password from Marilyn McBain, marilyn11n@comcast.net

For new SOs-IS, when the DSO-IS is satisfied that you are correctly entering all data, they are to request a password for the Production Database.