USING AUXDATA D-TRAIN 2023

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AGENDA

- Mission Codes
- Member Data
- Activity Logs
  - How to use and create Lists
- Find and Create Reports
- Find Help
- Q&A

Mission Codes – 99 Mission Code

- **99A** – used for members that have an elected or appointed office and for duties related to that position and travel/prep
- **99B** – used for travel/prep for RBS missions including VE, PV, Patrols – Air/Boat/Radio
- **99C** – used for travel/prep for Marine Safety missions
- **99D** – used for travel/prep for training and training received. Also studying for training
- **99E** – use for travel/prep for all missions that aren't covered above, attending meetings, e.g. If not officer.

Mission Codes – 99 Problems

- Members putting in multiple 7029s instead of collecting hours for month and putting in one entry7029 missions are individual missions except for 99D for students on 7039

- Putting multiple members on 99E for Unit Meetings. Not encouraged as there can be double counting if member individually sends in same hours. Need to break out those who are officers vs. non-officers. If done, IS officer must ensure hours for each month are correct for members

Mission Codes - Problems

- **Wrong Mission Codes Used**
  - Member needs certification
  - Member just picks a code that look good
- **Mission Codes are broken up into two Categories:**
  - Auxiliary Support Missions –
    - OPCON is **Seventh District**
  - Coast Guard Support Missions –
    - OPCON is the CG unit being supported

Logging IN TO AUXDATA

- Two Factor Authorization – can do with an App or email
- If get message to add an App but want to use email – click on "login without App"
- If having problems with password – don't keep logging in – send email to be sure to include name, brief description of problem to:

auxdata@acumensolutions.com

Member Record

- What Can be Updated on Member Record:
  - **Name** – First Name/MI/Last Name – any changes to name must be done by CG through a **D7 Help Ticket**. Auxiliarists cannot change names because of security issues.
  - **Address/Telephone Numbers** – Member or IS officer
  - **Email** – Member (by Avatar) or send email to auxdata@acumentsolutions.com. IS officers cannot update email.
  - **Emergency Contact Info** – Member or IS officer – Contact must be someone not in same household

Activity Logs – Details Page

- **UNIT –** is always a Flotilla unit – if multiple members and different units, use LEAD or LEAD Instructor.
- **OPCON** – default is Seventh District unless Coast Guard Support mission – use the Sector/Station/Cutter/Unit of CG depending on which unit gave orders to do mission
- **OPS Code** – only use if assigned to use Code – Hurricane Support, AUXMT self-attestation, Ombudsman, etc.
- **Mission Code** – check Mission Code description if not sure of code

Activity Logs – Related Page

- Add Files for Self-Attestation forms
- Add Files for 7039 Workshop form (put on 99D)

Activity Logs – Adding Members Page

- Add members - LEAD for most missions PA, 99s, except in PE assisting Instructor as Aide; Code 26 – always Non-Lead – must be CG trained crew;
- Be sure to Save

Activity Log – Status

- New Activity Log is always in **OPEN** Status, once member completes Detail/Add Name(s), change Status to **Approval Requested**.

- IS officer will receive notification AL is ready to be checked and approved.

Activity Logs – Cloning

- Certain Mission Codes cannot be cloned
- Be careful with cloning – if using different Mission Code or Activity Code (UMS/UPA/UPE or UCG) do not clone.
- OPCONs and Tasks do not carry over when cloning

Lists

- Can update and save lists for certain criteria
- Some Lists can be printed

Setting Up Lists

- Lists can be used to find information quickly
  - Filters determine what records are shown
  - Choose what fields you want to display
  - Can sort by any field
- Multiple lists easier than changing filters/fields
- FSO should have lists for own flotilla
- SO should have lists for each flotilla and division
- In each object, pin the list you use the most
- Lists, except for Recently Viewed, have Printable View
  - Can be printed, including to a PDF file
  - Can be copied and pasted into Excel

Filter Tricks for Lists or Reports

- Filter Logic:
  - Default is AND: record needs to meet requirements of all filters
  - Can use logical AND/OR between filters
- Most filters allow multiple entries: pick list or text (OR)
- Look through all filters to see what is available
- Use a date filter to keep list shorter and relevant
  - Activity Logs: Mission Start Time
  - Patrol Orders: Patrol Date
- Unit Number starts with: allows Flotilla, Division, District, or National
- Cross Filters: only for reports

Member List

- Clone an existing list that has close to what you want
  - Cannot clone Recently Viewed lists
  - Start with All Active Members and name as appropriate
- Filters (funnel icon)
  - Remove All
  - Filter by Owner: All Members
  - Unit Number equals flotilla number or starts with division number
  - Member Status equals: AP, IQ, BQ, AX (pick list)
  - Click Save and close Filters box to give more room for display

Member List (cont.)

- Select Fields to Display
  - Includes all member and unit data
  - Name: shows entire name with suffix (sorts by first name, selectable)
  - Last/First shows only Last, First (sorts by last name, not selectable)
  - (Em) after name means Emergency Contact info
  - Last Name and First Name are now selectable
  - Some tasks and certifications are included
    - AUXCT and BQC2 (0/1 or checkbox)
    - Intro to Risk Management
    - Vessel Examiner, Flight Examiner, Flight Inspector, Radio Inspector, PPE Manager
  - Some positions/offices are included to support facility inspections
  - Use left and right arrows to put desired fields in Visible Fields window
  - Use up and down arrows to move visible fields

Units

- Clone an existing list: All Units
- Select Fields to Display
  - Unit Number (not selectable), Unit Name (selectable)
  - Officers: Only FC, FSO-IS, FSO-MT
  - Meeting info, website (link)
- Select Filters
  - Unit Number starts with division
  - Status equals Operational (pick list)
  - Click Save and close Filters box to give more room for display

Activity Logs

- Clone an existing list: All
- Select Fields to Display
  - Activity Record Number (selectable)
  - Unit Number, if for multiple units
  - Mission Start Time, Mission Code, Duration
  - Summary of Activities
  - Number of VSCs, Visits, and Enrollees
  - Review Status
  - Owner Last Name (who created it)
- Select Filters
  - Unit Number equals flotilla or starts with division
  - Review Status as desired: Open, Approval Requested, Needs Clarification, Under Review, Approved
  - Mission Start Time greater than (as desired to keep list shorter)

Member Activity

- Member Activity Record is created for each person in an Activity Log
- List is best used to show activities of a single member
- Clone an existing list: My Member Activities
- Select Fields to Display (limited to fields on Activity Log Details tab plus Member and Member ID)
  - Activity Log (selectable)
  - Member (First MI Last) and/or Member ID
  - Activity Mission Code, Activity Mission Start Time, Activity Duration
  - Number of VSCs, Visits, Enrollees, Miles, Cost
  - Position
- Select Filters
  - Member ID (needed)
  - Mission Code
  - Activity Mission Start Time greater than (and/or less than)

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Facilities

- Clone an existing list: All Operational Facilities
- Select Fields to Display
  - Facility Record Number (selectable)
  - Record Type: Aircraft, Boat, PWC, Paddlecraft, Radio, Vehicle
  - Registration, Facility Name, Unit, Status, Inspection Expiration, Owner
  - Other facility information
- Select Filters
  - Unit Number as desired
  - Record Type (pick list) as desired (separate lists for each type)
  - Status equals (pick list) Operational, Non-Operational, Not Approved…

Patrol Orders

- Clone an existing list: All
- Select Fields to Display
    - Patrol Order Record Number (selectable)
    - Facility (selectable)
    - Facility Type, Facility Name, Owner Last Name (selectable)
    - Patrol Date, Status,
    - Location is Sector or Air Station, Sub-Unit is Station, MSD, or MSU
    - Created By (selectable)
- Select Filters
    - Location and/or Sub-Unit as desired (Unit Number not available)
    - Facility Type: (pick list) Aircraft, Boat, PWC, Paddlecraft, Radio, Vehicle
    - Patrol Date greater than (to keep list short)

Reports

- Best to use Quick Stop Reports, find report that works, then Save As to Private Reports to edit.

- Performance Managements Reports – [National website](#)

- Not updated automatically – depends on report on how often updated

Report Types

- What you can see in a report depends on the report type

- See instructions in the [AUXDATA II How-to guides](#)

  - *Reports - How to Create a Simple Report*

  - *Reports - How to Use Quick Stop Reports Dec 2021*

- Over 100 different types are listed when you click to create a new report

- Find existing report that is close to what you want, save a copy to your Private Reports folder, and modify it

- Not all database objects can be included in the same report (like competencies and activities)

Folder Structure

- Extensive folder structure for reports

- You cannot create folders

- Private Reports: only person signed in can see

- You can only save reports to

  - Private Reports

  - Auxiliary All Access Folders

  - Tier 1 Support (only use if asked to save one there)

Using Existing Reports

- Find report in All Folders that has the information you want
    - .Quick Stop Reports
    - District, Division, Flotilla, Individual
- Save As to your Private folder
- Change Groups, Columns and Filters as desired
- Change switches as desired
- Save in desired configuration
- Can share with others by saving in an All Access Folder

Cautions

- Don't use Completed Date as filter for activities; use Mission Start Time.

- If reporting counts, like VSCs, PVs, or PE graduates; don't have members as a group or column unless you filter by LEAD.

Report Creation

- Questions
  - What is the relevant data?
  - What data do you want to display?
  - What unit(s) do you want to display for?
- Choose report type
- Choose groups: row and column
- Choose columns
- Choose filters

Finding Help

- **National Web Site**: https://www.cgaux.org
  - Home Screen – Left Margin – Click on **Aux Data II**
  - AUXDATA II Screen – Left Margin – Click on **Member How To**
    - Will need Member Zone Login
  - **AUXDATA II How to Guides & Instructions for Members** Screen
    - List of Guides to Help answer questions
    - Continuously updated by National AUXDATA Team
- **AUXDATA**
  - Log in to Salesforce
  - Member Home Screen under **Quick Links** will take you to **Member How To** screen on National Web Site