USCG Auxiliary
DSO-IS Conference Call

Keeping All of Us on the Same Page

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Agenda – 23 September 2020

1. AuxData II – Update Highlights
2. AuxData II – Known Issues
3. AuxData II – Feature Requests
4. AuxData II – Best Practices
5. Additional Questions and Concerns

AuxData II – Update Highlights

- **Activity Log email notifications now include the Activity Log Record Number in the body of the email message**

- **Only the assigned FSO-IS is sent an email alert when an activity's status is updated to 'Approval Requested'**

- **Email notification is sent to the assigned SO-IS officer when the "FSO-IS Reviewed" box is checked**

AuxData II – Update Highlights

- The email notification that is received by a facility owner when a Patrol Request is approved now includes relevant information (patrol date, patrol order number, facility name, etc.)

- The email notification that is received by a member when they are added to a Patrol Order as a Crew member includes patrol date, patrol order number, facility name, etc.

AuxData II – Update Highlights

A custom button (**Big Blue Banner**) has been added to the Activity Log page to allow IS Officers to delete Activity Log records that they do not "own"

- This custom button is only visible to auxiliary members with the IS Activity Log Approving Permission Set
- This button replaces the Delete Activity Log checkbox

If a user needs to delete an Activity Log record they own, then the standard Delete button should be used

AuxData II – Update Highlights

- **New validation ensures all assigned members on an Activity Log are assigned with a Lead position when the Mission Code = 99A or 99B or 99C or 99D or 99E**

  99D Lead has generated questions regarding members being set to Lead when the hours represent time taking a class. Please recall the Coast Guard's four categories of leadership:

  - Leading Self
  - Leading Others
  - Leading Performance and Change
  - Leading the Coast Guard

  Taking responsibility for seeking out and following through with training opportunities sounds to me like a perfect example of Leading Self

AuxData II – Update Highlights

While we're on the subject of 99D there is a lot of confusion regarding the code to use when entering workshop hours. The instructions on the 7029 form state: *Report all time in Training Support that is not otherwise reported on a 7030 or 7039. Any hours spent as a Trainee, other than attending a Workshop, should be reported here.* Those instructions are intended to prevent unintentional double dipping. The member fills out the 7029, the instructor is responsible for reporting workshop attendance with a 7039 or 7030. Unintentional double dipping can occur if both are reporting the hours.

AuxData II – Update Highlights

However that does not mean that the workshop hours are not recorded as 99D time. They are, but the instructor, not the member is reporting those hours.

Workshop hours are reported in two activity logs, one for the instructor/instructors and one for the students. Instructor time is recorded as 06A or 06B and student time as 99D. All of the students in the course are entered as leads for 99D and all are assigned to any task associated with the course. The instructor's participation in the task is recorded as part of the 06 Activity Log.

AuxData II – Update Highlights

- **If a member is assigned to a 99 Activity Log without a Lead position, the user will receive an error when the Update Activity Members button is clicked:**

- **"Please ensure the assigned members are assigned as a Lead."**

AuxData II – Update Highlights

- **The Activity Log page has been updated so that the Tab names are more intuitive: Add Member, Add Task, Member and Task Capture (We have asked that this last be changed to Assign Member to Task)**

- **New tab Add Task allows users to add the necessary tasks before completing the Task Capture process**

- **Users are still able to add tasks by navigating to Related > Tasks**

AuxData II – Update Highlights

To improve the usability of Chatter:

- All user records were updated so that the First Name field contains the first name and middle name (or middle initial)

- When users @mention other users they can type out the first name and view all users with the specified first name and see the middle name and last name to differentiate between users who have common names

AuxData II – Update Highlights

- A Location text field has been added to the Radio Facility page

- The Location has new help text: City and State where the facility is physically located.

AuxData II – Update Highlights

- New automation has been added to the Patrol Requests so that when an auxiliary member creates a patrol request, updates the status to Requested, and then does not modify the patrol request within 14 days beyond the Patrol Date, the patrol request status will update to Denied

- New Deletion Batch will automatically delete Patrol Requests when the Status is 'New' and the Last Modified date is 30 days beyond the Patrol Date

NOTE: This automation is not yet active in Production (most likely next release (Sprint))

AuxData II – Update Highlights

- **When a Patrol Request is created and an Operator has been assigned, a new validation verifies that the Operator is qualified to complete the requested patrol.**

- **If the Operator is not qualified for the specified Patrol Type then the user will receive an error once the Patrol Request is saved:**

   Operator does not have required qualifications.

AuxData II – Update Highlights

- A member who completed the AUXCOM task prior to AUG 1 2008 can be added as a Lead to 20B missions without needing TCO qualifications

AuxData II – Update Highlights

- **During our last call we discussed a known issue regarding Time Zones. The default Time Zone for all members was Pacific Time, which was creating some confusion. On the 18th Acumen ran a batch fix and changed the Time Zones to match member addresses.**

- **It would still be a good idea to check your Time Zone next time you log into the system.**

- **You can find your Time Zone under My Settings. Unfortunately you can't check them for your members, because you can't access their settings.**

AuxData II – Known Issues

We have a concern with hours and activities appearing in member records as soon as they are entered into the system regardless of the status marked. Logs still in Open status are showing up in member's records.

This is a glitch that needs to be addressed. We do not want activities entered into member records until after they have been approved.

AuxData II – Known Issues

We've discovered that Activity Logs (patrol itineraries) can be entered into the system prior to completion of the patrol. In other words, you can request a patrol for next month, complete your itinerary, submit the request for approval and be credited for the patrol hours immediately.

We have requested a lockout, as already exists in the standard Activity Logs. In the meantime please be aware of the problem and discourage the practice.

AuxData II – Known Issues

We've discussed in the past the problems associated with the migration of data from the legacy platform.

Issues include member hours (especially those related to operations), competencies, and currencies.

Please be aware that this is still an active concern and will be addressed.

AuxData II – Known Issues

We have also discussed the problem of Office Codes having being transferred from the legacy system without their associated sub codes so that a district cannot assign, for instance, several ADSO-EMs. As soon as a new one is added the existing one is dropped.

The problem is related to subcodes for the offices, and a solution is being sought. It looks like new codes will have to be written, but the process for doing so, has not yet been clarified.

AuxData II – Known Issues

Commodore Davies clarified some of the problems regarding the office codes during our call. In order to assign multiple people to the same position for example ADSOs for different regions or responsibilities, entirely new offices need to be created with unique names.

The problem is that, as of right now, those offices cannot be created on a District by District basis. They have to be created Nationally, which you can imagine, might lead to a completely out of control list of offices.

There is still work to be done on this.

AuxData II – Known Issues

We still have an issue with tasks appearing in Member Training Reports, but not appearing in the Member Status Report. The problem appears to be that IS officers or members entering tasks do not have access to the task completed button, which DIRAUX users can see.

Acumen has automated the system so that when an IS officer or member enters a task, the system reads the task as complete so that the "button" is pushed automatically.

AuxData II – Feature Request

Many IS Officers have requested the ability to share reports with their units and the only mechanism for doing this so far has been to export the report into an excel file.

A new *Auxiliary All Access* folder is being created that will allow sharing of reports within and across Districts and Divisions. Flotillas will be able to have folders created by request as creating 754 of them, many of which may never be used.

Please be aware that we are talking about a lot of reports here. Districts will be asked to monitor their own folders.

AuxData II – Feature Request

Beware! Reports entered into the All Access folder will be open to all but can be stepped on accidentally.

In other words as it is now, I can go into any published report, change its parameters, customize it to my unit, and save it to my Private reports, without having any impact on the original report.

With shared folders the possibility exists that I can like your report, customize it for my unit, and save it, having forgotten to transfer it first to my own unit's folder.

I've just overridden your report.

We've requested an "Are you sure?" message before anyone can do a simple Save, rather than Save As.

Best Practices

We have a number of people becoming comfortable with accessing and generating reports in AuxData II, but I can't say that is true of all of us.

I would recommend finding someone on your staff, an ADSO, SO, FSO, who likes messing about with computers, and enjoys the challenge of a new system, and assign that person as your report support person.

That person can provide training and support to anyone in the District trying to find, share, or create a report.

Additional Questions, Comments, or Concerns?