5060 / AUX-SOP-011(A)

04 Apr 2023

MEMORANDUM

Reply to   CG-BSX-11
Attn of: LT C. Booth
(202) 372-1056

From: /T. P. Glendye, CAPT/
Chief, Office of Auxiliary and Boating Safety

To: Distribution

Subj: AUXDATA II FILES FUNCTIONALITY USAGE STANDARD OPERATING PROCEDURES

Ref: (a) Auxiliary Manual, COMDTINST M16790.1 (series)

1. <u>PURPOSE</u>. These Standard Operating Procedures (SOP) address when, why, and how to use the newly added Files functionality in AUXDATA II.

2. <u>ACTION</u>. All AUXDATA II administrators, specifically the District Directors of Auxiliary (DIRAUX), shall adhere to this SOP.

3. <u>AUTHORIZED RELEASE</u>. Internet release is authorized.

4. <u>DIRECTIVES AFFECTED</u>. None.

5. <u>BACKGROUND</u>. As the Coast Guard's information system of record for its Auxiliarists, AUXDATA II serves as the appropriate repository for important training records like Auxiliarists' qualification letters. In early March 2023, AUXDATA II was updated to include the File functionality within the competency tab of the member record. This update was meant to allow all assigned member competencies to have their associated qualification letters attached and stored as PDF documents.

6. <u>DISCLAIMER</u>. This SOP is not a substitute for applicable legal requirements, nor is it itself a rule. It is intended to provide guidance for Auxiliary personnel and is not intended to nor does it impose legally binding requirements on any party outside the Coast Guard.

7. <u>MAJOR CHANGES</u>. None.

8. <u>SCOPE AND AUTHORITIES</u>. It is recommended the reader become familiar with the AUXDATA II information system noted throughout this SOP.

9. <u>ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS</u>. This SOP will not result in any substantial change to existing environmental conditions or violation of any applicable federal, state, or local laws relating to the protection of the environment.

10. <u>DISTRIBUTION</u>. No paper distribution will be made of this SOP. An electronic version will be posted on the CG-BSX web site: http://agroup-bx.wow.uscgaux.info/content.php?unit=BX-GROUP&category=sop .

11. <u>RECORDS MANAGEMENT CONSIDERATIONS</u>. Records created as a result of this SOP, regardless of format or media, must be managed in accordance with records retention guidance in reference (a).

12. <u>FORMS</u>. Forms that may be associated with this SOP will be available on the Coast Guard Auxiliary webpage at the following link: https://forms.cgaux.org/forms1.php .

13. <u>REQUESTS FOR CHANGES</u>. Auxiliary units and individuals may formally recommend changes in writing through the chain of leadership and management including the appropriate Auxiliary national program manager(s) (email acceptable). Comments and suggestions from users of this SOP are welcomed. All such correspondence may be emailed to the Commandant (CG-BSX) at CGAUX@uscg.mil .

                                                    #

 Encl: (1) AUXDATA II Files Functionality Usage SOP

 Dist: DIRAUX, C5ISC, ANACO-IT, DIR-C, DIR-U, Salesforce

**AUXDATA II Files Functionality Usage
Standard Operating Procedures**

Table of Contents

Encl (1)

1. How to Add a Qualification Letter. Upon completion of a qualification, an Auxiliarist will be given a qualification letter signed by the District Director of Auxiliary (DIRAUX). The DIRAUX will add the applicable competency to the member record in AUXDATA II. The steps on how to add the qualification letter as a PDF document are below:

    a. Navigate to the Member Record – Related Tab – Competencies.

Home	Members	Units	Activity Logs	Member Activities	More ∨		Q test

Members > Ryan NMN Test
Competencies   New

4 items • Sorted by Status • Updated a few seconds ago

	Member Competency Recor... ∨	Competency Type	∨	Status ↓	∨	Original Certification Date	∨	REYR Start Date	∨	
1	MC-227381	VESSEL EXAMINER		REYR		12/3/2020		1/21/2022		▼
2	MC-228599	BOAT CREW CREWMEMBER		REYR		3/15/2021		1/21/2022		▼
3	MC-227377	AUXCT - CORE TRAINING		Certified						▼
4	MC-227378	BASIC QUALIFICATION COURSE II		Certified						▼

    b. Click on the desired Member Competency Record Number. Once that tab opens the details of the competency field will become visible. At the bottom of the page is the newly added Files feature. Click on Add Files.

Member Competency
MC-227381   Delete   Edit

Member Competency Record Number
MC-227381

Member
Ryan NMN Test

Original Certification Date
12/3/2020

Competency Category
UNIT

Competency Type
VESSEL EXAMINER

Status
REYR

Status Assigned Date
12/3/2020

Night Certified
☐

Comments
Prior Year req'd workshop not complete for VE

Recertification/ Expiration Date

REYR Start Date
1/21/2022

Created By   Last Modified By
Ryan Gordon , 12/3/2020 8:38 AM   Admin User 42 , 7/27/2022 7:34 AM

Tasks (0)   New
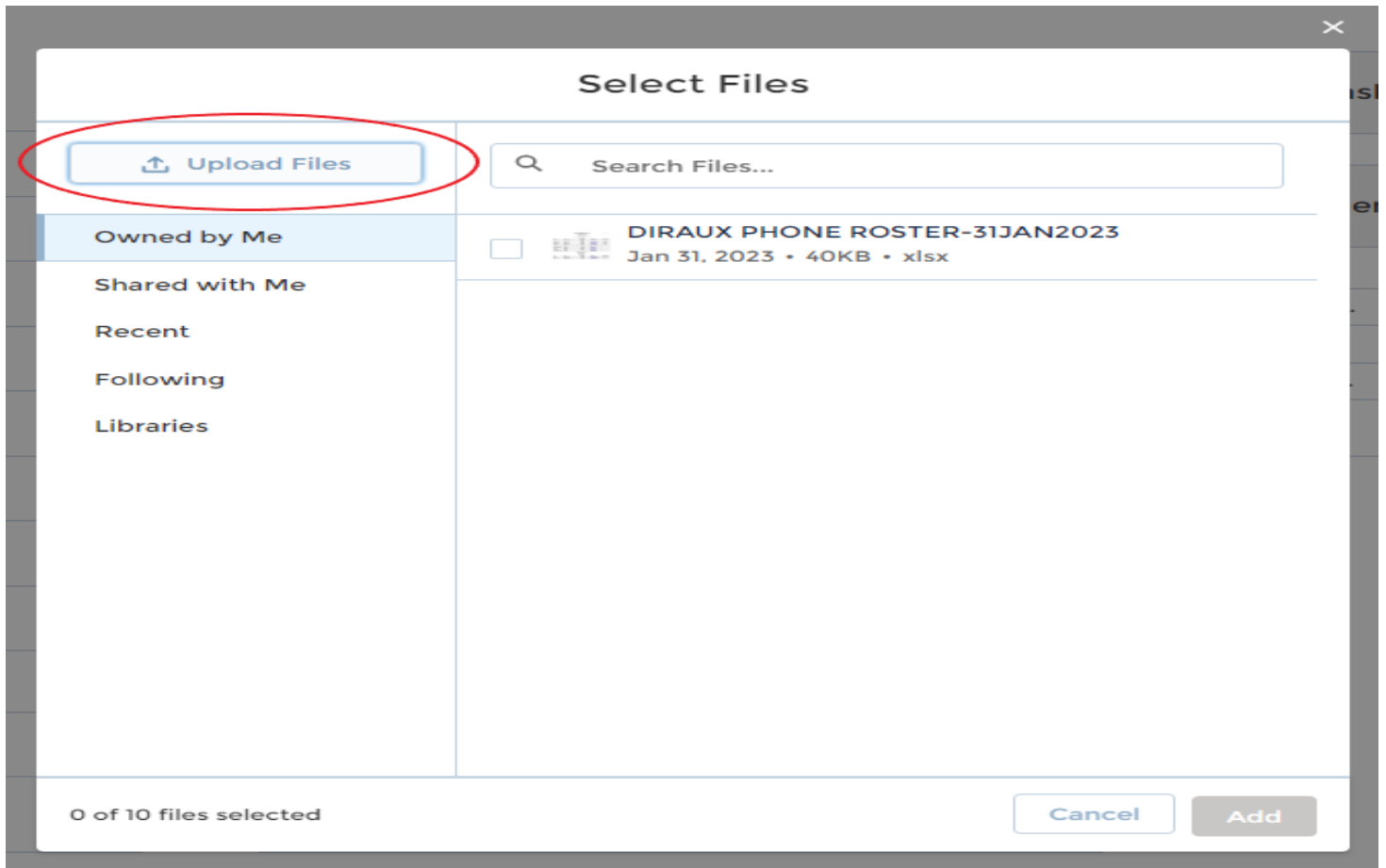
Member Competency History (3)

Date	Field	User	Original...	New Va...	
7/27/2...	Original...	Admin ...		2020-12...	▼
1/21/2...	Status	Admin ...	Certified	REYR	▼
12/3/2...	Created.	Ryan G...			▼

View All

**Files (0)**   Add Files

Title	Owner	Last Modified	Size

c. A new page will appear where the desired file can be added. Click on Upload File to select the desired document to add.

Select Files

⟳ **Upload Files**

🔍 Search Files...

Owned by Me

☐ 📊 **DIRAUX PHONE ROSTER-31JAN2023**
Jan 31, 2023 • 40KB • xlsx

Shared with Me

Recent

Following

Libraries

0 of 10 files selected

Cancel   **Add**

d. Once selected, the PDF will be added to the member competency. Click Done to finish the process.

7/27/3

Upload Files

PDF **UTV Examiner.pdf**
368 KB   ✓

1 of 1 file uploaded   **Done**
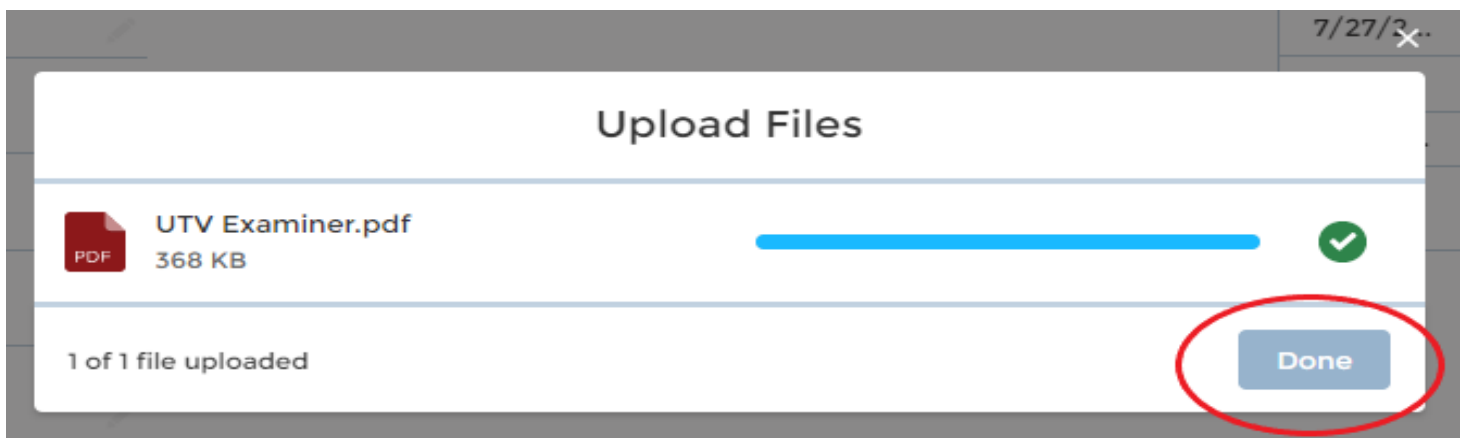
e. Once complete, the newly added qualification letter will be displayed under the Files Tab on the Member Competency Page.

Member Competency Record Number
MC-227381

Member
Ryan NMN Test

Original Certification Date ⓘ
12/3/2020

Competency Category
UNIT

Competency Type
VESSEL EXAMINER

Status
REYR

Status Assigned Date ⓘ
12/3/2020

Night Certified ⓘ
☐

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Last Modified By
Admin User 42 , 7/27/2022 7:34 AM

📁 **Files (1)**   [Add Files]

Title	Owner	Last Modified	Size	
📄 UTV Examiner	Christopher Booth	3/14/2023 9:03 AM	368KB	▾

View All

2. How to Delete a Qualification Letter. Should the Auxiliarist ever need a qualification letter removed, the steps to complete that action are below:

a. Navigate to the Member Record – Related Tab – Competenices.

b. Click on the desired Member Competency Record Number. At the bottom of the page is the Files Feature with the added qualification letter. Click on the drop down arrow on the right side of the Files tab.

Member Competency Record Number
MC-227381

Member
Ryan NMN Test

Original Certification Date 🛈
12/3/2020

Competency Category
UNIT

Competency Type
VESSEL EXAMINER

Status
REYR

Status Assigned Date 🛈
12/3/2020

Night Certified 🛈
☐

Comments
Prior Year req'd workshop not complete for VE

Recertification/ Expiration Date

REYR Start Date
1/21/2022

Created By   Last Modified By
👤 Ryan Gordon , 12/3/2020 8:38 AM   👤 Admin User 42 , 7/27/2022 7:34 AM

📋 Files (1)   [Add Files]

Title	Owner	Last Modified	Size	
📄 UTV Examiner	Christopher Booth	3/14/2023 9:03 AM	368KB	▼

View All

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    c.   Click on Delete. A confirmation page will appear and click on Delete. This will remove the qualification letter from the Member Competency.

✕

Delete File?

Deleting a file also removes it from any records or posts it's attached to.

                                             [Cancel]   [**Delete**]