



16798/ AUX-PL-027(A)
BSX Policy Letter 24-02
08 May 2024

MEMORANDUM

From: /S. J. Minutolo, GS-14/
Chief Director of Auxiliary (Acting)

Reply to LT C.W. Booth
Attn of: (202) 372-1056

To: Distribution

Subj: DESIGNATION OF AUXILIARY METRIC FILTERS IN AUXDATA II

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

1. PURPOSE. This Policy Letter designates approved filters to be used for generating Auxiliary statistics reports within the Coast Guard's Auxiliary information system of record, AUXDATA II.
2. ACTION. All Auxiliarists and District Directors of Auxiliary (DIRAUX) must comply with the provisions in this Policy Letter.
3. AUTHORIZED RELEASE. Internet release is authorized.
4. DIRECTIVES AFFECTED. None.
5. BACKGROUND. Since coming online in 2020, AUXDATA II and its numerous and dynamic statistics-capturing capabilities have been utilized to create countless reports which have been used by senior Coast Guard and Auxiliary leadership. Many of these reports utilized different formulas to derive the same metrics. To standardize the derivation of these metrics, the Auxiliary Division (CG-BSX-1) has worked closely with Salesforce to create standardized reporting formulas and features.
6. DISCLAIMER. This Policy Letter is not a substitute for applicable legal requirements, nor is it a rule. It is intended to define requirements for Auxiliarists and is not intended to, nor does it impose legally binding requirements on any party outside the Coast Guard.
7. MAJOR CHANGES. None.
8. SCOPE AND AUTHORITIES. It is recommended the reader become familiar with any directives and publications noted throughout this Policy Letter.
9. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS. This Policy Letter will not result in any substantial change to existing environmental conditions or violations of any applicable federal, state, or local laws relating to the protection of the environment.

10. DISTRIBUTION. No paper distribution will be made of this Policy Letter. An electronic version will be posted on the Chief Director of Auxiliary and Coast Guard Auxiliary web sites: <https://www.uscgaux.info/content.php?unit=BX-GROUP> and <http://www.cgaux.org/>, respectively. All web sites in this Policy Letter are the most current available. If the cited web site link does not work, then access should be attempted by copying and pasting or typing the web site address into the user's internet browser.

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

12. REQUEST FOR CHANGES. Questions concerning this Policy Letter should be directed to CG-BSX-1 at CGAUX@uscg.mil. Auxiliary units and individuals may recommend changes in writing via their cognizant Auxiliary chain of leadership to the same address.

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Encl: (1) AUXDATA II Report Filters

Dist: DIRAUX, NEXCOM, DCOs, ANACO-IT

AUXDATA II Report Filters

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Introduction General Report Components and Definitions

1. AUXDATA II reports consist of the following components, which may be referenced in this Policy Letter.
 - a. Data Object(s): AUXDATA II data table(s) from which report output is referenced and constructed.
 - b. Report Template: One or more related Data Objects that provide fields from which reports are laid out and filtered. NOTE: The template used for a report is displayed next to the Report Title when a report is run in AUXDATA II.
 - c. Report Outline: Field(s) that define the detailed or summarized layout of a report.
 - d. Report Filter(s): Criteria that refines the data being reported on.
 - e. Relative Date Filter: Date filter option based on standard language rather than explicit dates. NOTE: Relative Date filters permit reports to update in real time to change to new time spans without having to set explicit dates to do so (e.g., the Relative Date filter THIS YEAR will return results for the current calendar year and will change to the new calendar year on January 1).

Section 1
Auxiliary Members by District

1. The following setup shall be used to create a report that details the number of currently active Auxiliarists as broken down by district.

a. Referenced Data Objects:

- (1) Members
- (2) Units

b. Report Outline – Groups: GROUP ROWS

- (1) District [Units]

c. Report Outline – Columns:

- (1) Unit Name [Units]
- (2) Member ID [Members]

d. Filters:

Filters
Show Me All units
Created Date All Time
Member Status equals AP, AX, BQ, IQ
Members Record Type equals Auxiliary Member
Unit Name does not contain test flotilla
Unit Number starts with 0, 1
Unit Number not equal to 0

Section 2
Auxiliary Vessel Safety Checks by District

1. The following setup shall be used to create a report that details the number of Vessel Safety Checks (VSC) as broken down by district for the current calendar year.

a. Referenced Data Objects:

(1) Activities

(2) Units

b. Report Outline – Groups: GROUP ROWS

(1) District [Units]

c. Report Outline – Columns:

(1) Unit Name [Units]

(2) # Number of Exams Given [Activities]

(3) # Number of Exams Passed [Activities]

d. Filters:

Filters
Show Me All activities
Activity: Created Date All Time
Mission Start Time equals THIS YEAR
Mission Code equals 91A: VESSEL SAFETY CHECK

NOTE: This specific filter only captures the number of VSCs completed and passed, it does not account for other exams such as commercial fishing vessel exams, paddle craft exams, etc.

Section 3
Auxiliary Program / Marine Dealer Visits by District

1. The following setup shall be used to create a report that details the number of Program / Marine Dealer Visits as broken down by district for the current calendar year.

- a. Referenced Data Objects:
 - (1) Activities
 - (2) Units
- b. Report Outline – Groups: GROUP ROWS
 - (1) District [Units]
- c. Report Outline – Columns:
 - (1) Unit Name [Units]
 - (2) # Number of Visits [Activities]
 - (3) Mission Start Time [Activities]
- d. Filters:

Filters
Show Me All activities
Activity: Created Date All Time
Mission Start Time equals THIS YEAR
Mission Code equals 11: RBS VISITOR MISSIONS

Section 4
Auxiliary Commercial Fishing Vessel Exams by District

1. The following setup shall be used to create a report that details the number of Commercial Fishing Vessel Exams as broken down by district for the current calendar year.

- a. Referenced Data Objects:
 - (1) Activities
 - (2) Units
- b. Report Outline – Groups: GROUP ROWS
 - (1) District [Units]
 - (2) Mission Code [Activities]
- c. Report Outline – Columns:
 - (1) Unit Name [Units]
 - (2) # Number of Exams Given [Activities]
 - (3) # Number of Exams Passed [Activities]
- d. Filters:

Filters
Show Me All activities
Activity: Created Date All Time
Mission Start Time equals THIS YEAR
Mission Code equals 91C: COMMERCIAL FISHING VESSEL EXAM, 91D: UNINSPECTED PASSENGER VESSEL

Section 5
Lives Saved / Assisted and Property Value Saved by the Auxiliary

1. The following setup shall be used to create a report that details the number of lives saved, lives assisted, and property value saved for the current calendar year.

- a. Referenced Data Objects:
 - (1) Activities
 - (2) Units
- b. Report Outline – Groups: GROUP ROWS
 - (1) District [Units]
 - (2) Patrol Location [Activities]
- c. Report Outline – Columns:
 - (1) Unit Name [Units]
 - (2) # Lives Saved [Activities]
 - (3) # Property Value [Activities]
 - (4) # Persons Assisted [Activities]
- d. Filters:

Filters
Show Me All activities
Activity: Created Date All Time
Mission Start Time equals THIS YEAR
Lives Saved greater than 0
Property Value greater than \$0.00

Persons Assisted greater than 0

Report filter logic should further reflect:
Mission Start Time equals THIS YEAR
AND ((Lives Saved greater than 0) OR
(Property Value greater than \$0.00) OR
(Persons Assisted greater than 0))

NOTE: Sector [Units] grouping within the report setup will display the sector under which the lives saved, lives assisted, and property value saved occurred.

Section 6
Auxiliary Non-Reimbursable Miles and Non-Reimbursable Expenses

1. The following setup shall be used to create a report that details the number of non-reimbursable miles and the amount of non-reimbursable expenses accrued by the Auxiliary as broken down by district for the current calendar year.

a. Referenced Data Objects:

- (1) Activities
- (2) Units

b. Report Outline – Groups: GROUP ROWS

- (1) District [Units]

c. Report Outline – Columns:

- (1) Unit Name [Units]
- (2) # Miles [Activity: Info]
- (3) # Cost [Activity: Info]

d. Filters:

Filters
Show Me All activities
Activity: Created Date All Time
Mission Start Time equals THIS YEAR
Cost greater than \$0.00
Miles greater than 0

Report filter logic should further reflect:
Mission Start Time equals THIS YEAR
AND ((Cost greater than \$0.00) OR
(Miles greater than 0))

Section 7
Total Auxiliary Certified Operational Competencies

1. The following setup shall be used to create a report that details the number of certified operational competencies as broken down by aviation and surface for the current calendar year.

a. Referenced Data Objects:

(1) Member Competencies

b. Report Outline – Groups: GROUP ROWS

(1) Competency Category [Member Competencies]

(2) Competency Type [Member Competencies]

c. Report Outline – Columns:

(1) Member Competency Record Number [Member Competencies]

d. Filters:

Filters
Show Me All member competencies
Activity: Created Date All Time
Status equals Certified
Competency Category equals AIR, BOAT

Section 8
Auxiliary Certified Operational Competencies by Type

1. The following setup shall be used to create a report that details the number of certified operational competencies by type for the current calendar year.

a. Referenced Data Objects:

(1) Member Competencies

b. Report Outline – Groups: GROUP ROWS

(1) Competency Type [Member Competencies]

(2) Competency Category [Member Competencies]

c. Report Outline – Columns:

(1) Member Competency Record Number [Member Competencies]

d. Filters:

Filters
Show Me All member competencies
Activity: Created Date All Time
Status equals Certified
Competency Category equals AIR, BOAT

NOTE: Competency type grouping within the reference report shows the certified operational competencies separated by type.

Section 9
Auxiliary Operational Facilities by Type

1. The following setup shall be used to create a report that details the number of operational facilities by type.

a. Referenced Data Objects:

(1) Facilities

b. Report Outline – Groups: GROUP ROWS

(1) Facility Record Type [Facilities]

c. Report Outline – Columns:

(1) Facility Record Number [Facilities]

(2) Unit Number [Facilities]

d. Filters:

Filters
Show Me All facilities
Created Date All Time
Status equals Operational
Unit Number starts with 0, 1

Section 10
Current Calendar Year Activity Log Hours

1. The following setup shall be used to create a report that details the number of activity log hours by district for the current calendar year.

a. Referenced Data Objects:

- (1) Activities
- (2) Units

b. Report Outline – Groups: GROUP ROWS

- (1) District [Units]
- (2) Mission Code [Activities]

c. Report Outline – Columns:

- (1) # Duration [Activities]

d. Filters:

Filters
Show Me All activities
Activity: Created Date All Time
Mission Start Time equals THIS YEAR

Section 11
Current Calendar Year Total Member Hours

1. The following setup shall be used to create a report that details the number of member hours by district for the current calendar year.

a. Referenced Data Objects:

- (1) Activities
- (2) Member Activities
- (3) Units

b. Report Outline – Groups: GROUP ROWS

- (1) District [Units]

c. Report Outline – Columns:

- (1) # Activity Duration [Member Activities]

d. Filters:

Filters
Show Me All members
Created Date All Time
Activity Mission Start Time equals THIS YEAR

Section 12
Current Calendar Year Public Education Hours

1. The following setup shall be used to create a report that details the number of Public Education member hours by district for the current calendar year.

a. Referenced Data Objects:

- (1) Activities
- (2) Member Activities
- (3) Units

b. Report Outline – Groups: GROUP ROWS

- (1) District [Units]
- (2) Mission Code [Member Activities]

c. Report Outline – Columns:

- (1) Member Activity Record Number [Member Activities]
- (2) # Activity Duration [Member Activities]

d. Filters:

Filters
Show Me All activities
Activity: Created Date All Time
Mission Start Time equals THIS YEAR
Mission Code starts with 14

Section 13
Current Calendar Year Public Affairs Hours

1. The following setup shall be used to create a report that details the number of Public Affairs member hours by district for the current calendar year.

a. Referenced Data Objects:

- (1) Activities
- (2) Member Activities
- (3) Units

b. Report Outline – Groups: GROUP ROWS

- (1) District [Units]
- (2) Mission Code [Member Activities]

c. Report Outline – Columns:

- (1) Member Activity Record Number [Member Activities]
- (2) # Activity Duration [Member Activities]

d. Filters:

Filters
Show Me All activities
Activity: Created Date All Time
Mission Start Time equals THIS YEAR
Mission Code starts with 10