

AUXDATA II Activity Log Approval Processes

This document details the activity log approval process. Please note all red text indicates an automated update. All other updates are manually done by the end user.

Activity Log Approval Process

- Auxiliarist creates a new activity record and inputs all the following required fields: Mission Code, Mission Start Time (Date and Time), and the Duration of the activity. They're able to capture any other activity details in the remaining fields.
- The FSO-IS and SO-IS fields are automatically populated upon creating and saving a new activity record. The system checks the submitter's unit and pulls the active FSO-IS from their flotilla and the active SO-IS from their division
- The 'Unit' and 'OPCON' fields are automatically populated upon creating and saving an activity record when they are left blank. The system populates the submitter's flotilla unit on the 'Unit' field and the system populates the submitter's district unit on the 'OPCON' field. If the user manually populates these before saving the record, the system will not overwrite these inputs.
- Auxiliarists can assign members to an activity log by clicking 'Member Assignment.' Type the name of the member who needs to be added to this activity in the search box, click on the checkbox next to their name and member ID, and click 'Add Members.' At the bottom of the screen you are able to select the member's position. Click 'Update Activity Members' to add the selected members to the activity. The auxiliarist will need to add at least one member to the activity log before submitting.
- A member activity record is created for each assigned member. This can be found under the 'Member Activities' related list on the activity record
- Auxiliarists can create and assign tasks to members assigned to the activity. Click 'Related' and 'New' next to tasks. Choose the 'Task Type' from the dropdown and click 'Save.' Navigate to 'Task Capture' and select the radial next to the task (note you may need to click 'Refresh Tasks' before anything shows up). Select the checkbox next to the users you wish to assign the task to and click 'Assign Task to Members.' You can view assigned tasks to members under the assigned members view.
- A member task record is created for each member assigned to the task. Although the member task will not display under the activity related list, they can be found under the 'Member Tasks' related list on the member record.
- After reviewing the activity log and finding no errors, the user is able to update the status from 'Open' to 'Approval Requested.' Should an auxiliarist discover an error after submission, then they are able to recall the activity by changing the status back to 'Open.'
- The FSO-IS and SO-IS assigned to this activity will receive an email alert notifying them that there is a new activity to review when the status is changed to 'Approval Requested.' Included in the alert is a link to the activity record.

- The IS officers assigned to the activity can begin to review. The status should be changed to 'Under Review' to signify to other IS officers that this activity is being actively reviewed
- Should any information be incorrect, the IS officer can send the activity back to the auxiliarist who created it by detailing the errors under the 'Clarification Comments' field and updating the status to 'Needs Clarification.'
- **The system will send an email to the auxiliarist letting them know that they have an activity log that they need to clarify. Included in the email is a link to the activity record and the clarification comments.**
- Some FSO-IS officers are able to review Activity Logs but not approve them. These officers have been assigned the FSO-IS Officers Reviewing Activity Logs permission set and are able to check the 'FSO-IS Reviewed' checkbox, signifying to IS officers with the IS Officers Approving Activity Logs permission set that the activity has been reviewed and found to be accurate. FSO-IS officers with the FSO-IS Officers Reviewing Activity Logs permission set are also able to update the status to 'Needs Clarification' should there be any errors in the Activity Log.
- When an activity is found to be accurate and is ready for approval, an IS officer with the IS Officers Approving Activity Logs permission set can update the status to 'Approved,' completing the process.
- **The system will send an email to the auxiliarist letting them know that they have an activity log that has been approved. Included in the email is a link to the activity log.**
- **All member tasks associated with the activity are marked as completed and the activity date is captured from the related activity's 'Mission Start Time.'**

OTHER INFORMATION

- Boat and Aircraft Activity Logs must be created from the Patrol Order record for which they are related to
- Activity Logs must be created in the 'Open' Review Status
- Auxiliarists are only able to edit activities with a status of 'Open' or 'Needs Clarification'
- Auxiliarists can only update the status from 'Open' or 'Needs Clarification' to 'Approval Requested.' They will receive an error if they try to update to other values.
- Clarification comments must be entered before the status can be updated to 'Needs Clarification'
- IS officers with the IS Officers Approving Activity Logs permission set are able to edit activity logs in the 'Approved' status should any errors be discovered after approval
- The 'Chatter' tab allows user to easily communicate with one another with the @mention feature
- The 'Activity History' under 'Related' tracks important changes made to the Activity Log (note this is the last item under 'Related' and not the first which is similarly labeled)
- The 'FSO-IS Reviewed' field can be added to listviews
- The District and Division fields are hidden on the activity record, though they can still be used in listviews and when creating reports. IS officers at their respective levels can use these as filter to view all activities under their specific division or district