US COAST GUARD AUXILIARY
Information Technology User Support & Services
HOW TO ENTER A WORKSHOP OR TASK INCLUDING RM/TCT
(Including entry of the Workshop Activity Form- ANSC 7039, and Self Attestation Forms)
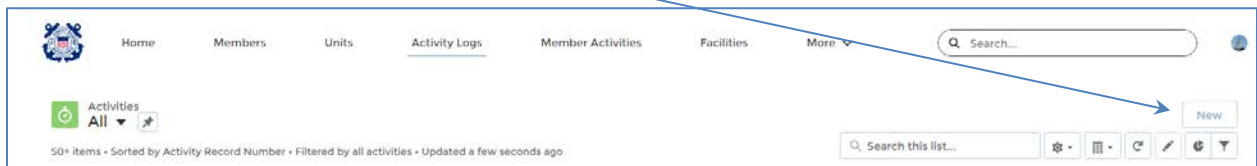
NOTES:

1. Please check with your DIRAUX or District Policy Manual to determine which Workshops and associated Tasks an IS Officer is authorized to enter and which are only to be entered by the DIRAUX Office or DAA.
2. There will be **TWO** Activity Log entries for a workshop that is done in an instructor led environment. One Activity Log will capture the time of the Instructors and Aides. The second will capture the Students in the Workshop.

Activity Log for Instructor and Aides (see page 5 for Activity Log for Students):

In AUXDATA II click on the ACTIVITY LOG Object

Click on "New" (upper right on top of table)

Select Unit/ Individual for Activity Type

Complete the initial Detail form. Select the appropriate Unit, OPCON (District) Mission code and Duration. No Operation Code is required.

For the Instructors and Aides, the Mission Codes will be 06A or 06B as appropriate to the Workshop being given. For example, mission code 06A should be used for the Operations Workshop and TCT. The mission code 06B should be used for Core Training.

Enter an explanatory note in the Summary of Activity field. It is suggested that you put in the last name of the LEAD and mention the Name of the workshop.

Click "Save". You will get the full Activity Log Record with the tabs as shown below (Detail, Related, Add Member, etc.).

You will be in the **Details** tab. Check and, if necessary, correct the information shown there. Be sure to scroll down to check the IS Office names and update those if necessary.

Click on the **Add Member** tab. One at a time, search for the name of the Instructor and Aides. Once you locate the correct member, click the box to the left of their name then click the blue Add Member button.

Once the member or members have been added to the record, Change the position for each member from "None" to the appropriate position for that member (Lead, or Non-Lead)

Once all of the members associated with this activity have been added to the table and positions assigned, click the green button, **Update Activity Members**, to finish Member Assignment

Go to the **Add Task** tab. Click New

On the New Task Screen, scroll through the list of tasks and select the task or tasks completed as part of this activity log.

If assigning a single task, click on the task then click on SAVE. If doing multiple tasks, click on the task then click on SAVE AND NEW then select the next task you wish to add. To see multiple tasks make sure you click "View all" at the bottom of the task table.

NOTE: for the Instructor of the Required Annual TCT Refresher- 2 tasks are entered: the TCT Refresher task and the "Instructor" task (TCTAUX – Teach a TCT refresher class (4 Required every two years).

Once the last task has been entered, click SAVE.

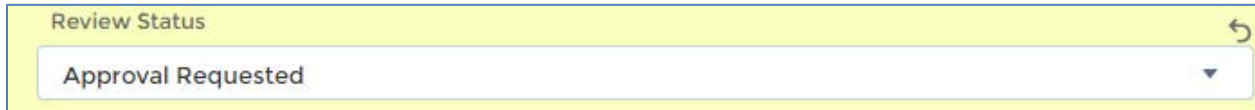Click on the **Member and Task Capture** Tab

The task(s) you selected will be listed on the top part of the page. Click the dot to the left of the task (or the first task if there is more than one) and the members you assigned will appear in the middle of the page. There will be a check mark to the left of each member's name. If the member is NOT to be assigned the task, uncheck the box next to the member's name.

When the correct members have been assigned to the task, click on the green "**Assign Task to Members**" box and the Member(s) name will shift to the bottom table on the page.

If you assign a task to a person in error click the box to the left of the member name in the bottom table and click the red "Remove Task" button.

Return to the **Details** tab

In the Review Status box at the top right on the page, click on the pencil icon to the right of the line that says "Open" and change the Review status to "Approval Requested"

This action will send a message to the FSO-IS that an Activity Log is available for their review and/or approval.

Activity Log for the Students Attending the Workshop

The procedure is the same as that for the Instructor and Aides with the following Exceptions:

1. The Mission Code to be entered on the Detail Screen will be **99D (Training).**
2. List the Students by going to the Add **Member** tab. One at a time, search for the name of each Student. Once you locate the correct member, click the box to the left of their name then click the Blue Add Member button. Assign each the position of **LEAD**. Don't forget to click on the Green "**Update Activity Member**" button when done. Do NOT include the Instructor and Aides.
3. Add Task and assign the task to each Student just as was done with the Instructor and Aides.
4. Once complete, return to the detail screen, check your work and if correct, change the Review Status to "Approval Requested"

HOW TO ENTER A SELF ATTESTATION (Core Training, Workshops)

Self-Attestation forms are submitted by members to indicate that they have completed a required Core Training or Workshop course. There is no Instructor. The Student is "Self-Taught" from a nationally provided Presentation. Not all Workshops can be completed by Self-Attestation. For example, in 2022 only the National IT and VE workshops were permitted to be done by Self-Attestation. Many tried to submit the Operations Workshop the same way but this was not permitted. The ALAUX announcing the Workshop requirement will tell you whether self-attestation for a particular workshop is allowed.

There is only one activity Log to enter for a Self-Attestation form reflecting the task completed by the student but there are some additional steps to the entry

Activity Log for the Students Attending the Workshop

The procedure is the same as that for the students of an Instructor - led workshop except that you need to enter the "Duration" for the workshop and you need to enter an Operations Code. The steps are as follows:

1. Click "**NEW**" to begin the Activity Log.
2. In the initial entry screen enter the Student's Unit name (if they are from outside of your flotilla).
3. Enter the AUXMT Operations Code
4. Enter the 99D mission Code
5. Enter duration for the mission- most Core Training or workshop courses should be no more than one hour each.
6. Enter a Summary of Activities with the Students name and the Course type
7. On the **Add Member** page, identify the Student who submitted the self-attestation. Once you locate the correct member, click the box to the left of their name then click the Blue "Add Member" button. Assign the student the position of LEAD. Don't forget to click on the Green "Update Activity Member" button when done.
8. Click on the **Add Task** page and select the task or tasks to be assigned. Most tasks that are completed by Self-attestation will be in the WORKSHOP folder.
9. Next click on **Member and Task Capture**. Click the button to the left of the Task and assign the click the green "Assign Task" button to assign the task to a student. If there are multiple Tasks, you will need to assign each task individually.
10. Go to the **Related Pag**e. Here you will upload an electronic copy of the self-attestation form. PDF format is preferred as a space saver. Go to the files section on the page and click the "Add File" button then select the file for upload from your computer.
11. Once complete, return to the **Detail** page, check your work and if correct, change the Review Status to "Approval Requested"

VERIFY YOUR ENTRY!

To verify that the member has been assigned the task properly. Go to the MEMBER Section of AUXDATA II. Look up one of the members you just assigned the task to, go to the related page in their record and look for the task in that person's Task list.