AUXDATA II Data Entry Checklist 7029/7030/7038

This is a step by step easy to use cheat sheet to help you get started with common forms in the new AUXDATA II system.

Four of the most commonly used forms are demonstrated here. The 7029 (category 99 entries), 7039 Workshop (4 hr TCT/Operations, others), and 7030 PA/PE missions.

7029 Entries

1. From the main menu, click the Activities Log tab.
2. Click new. **(upper right hand corner)**
3. Default record type is Unit/Individual. Leave as is.
4. Click next.
5. Click on Unit field. Search for the unit (082(division)(flotilla) or select from the pull-down list. It is important this is correct because it effects reports.
6. Click activity type field and select activity.
7. Click opcon field and press E on the keyboard. (This will take you down the list to select Eight District – Eastern Region.) **Note – even though this may not show on screen it will take you to the correct region)**
8. Review status – Leave as open.
9. Operations Code – Leave blank. Will be a pull down menu in the future.
10. Click mission code field and press 9 on the keyboard. (This will take you to the 1^{st} mission code that starts with a 9) Scroll down to select a 99 mission code and click on it to select.
11. Click on Date field and select the mission date.
12. Click on the Time field and select the mission time.
13. Click on the duration field and enter the duration. (you can mouse over the (i) icon to see how to enter portions of an hour.)
14. Click on the Summary of Activities and enter what you did. This is very important to explain what you did so the **FSO/SO-IS** can make sure you selected the right mission code.
15. Click on Miles and enter if applicable.
16. Click on Costs and enter if applicable.
17. Click Save.
18. Click the Member Assignment Tab.
19. Click on Search User and type in their information. (This is a specific search field so you must type in the exact information you are looking for or it will not find it. Typically use the last name or member ID number in this field.)
20. Click the check box next to the members name.
21. Click add members.
22. Click on the position field and select Lead. (IT IS VERY IMPORTANT TO SELECT THE CORRECT POSITION FOR ALL MEMBERS IN AN ACTIVITY.)
23. Click Update activity members.

System will say at the top of the screen “Save was successful”.

OPTIONS:

1. Click on Submit for approval tab to submit the entry for approval by the **FSO/SO-IS**.
2. Leave review status for this activity as open for the entire month. As you do more 99 activities, you can add to the entry by advancing the date/time, and add to the hours and cost, then at the end of the month, you can click the submit for approval button.
3. Instead of creating a brand new entry for each mission code, you can select the clone button to make a copy of the entry and then change the record information.(CLOANING

DOES NOT COPY THE UNIT RECORD SO YOU HAVE TO DO THAT MANUALLY).

When the submit for approval button is clicked, an email is sent to the **FSO/SO-IS** with a link to the record for approval.

Cloning (copying) a record to save keystrokes.

1. From the activity view list click on an Activity that has a review status of OPEN.
2. In the upper right hand corner click Clone.
3. Click on Edit.
4. Click on Unit and select.
5. Click on Mission code and select the new mission.
6. Click on Date and select.
7. Click on Time and select.
8. Click on Duration and enter.
9. Click on Summary of activities and enter details of the mission.
10. Click on mile and enter if applicable.
11. Click on cost and enter if applicable.
12. Click on save.

Member assignment and position is also cloned.

Recalling an entry submitted for approval to correct a mistake.

1. From the activity list, click on the activity record number.(AL-XXXXXX)
2. Click on related tab.
3. Under the approval history, click the down arrow next to approve/reject, and select recall.
4. Enter a comment as to why this is being recalled.
5. Click recall button.

7030 PA event

1. From the main menu, click the Activities Log tab.
2. Click new. **(upper right-hand corner)**
3. Default record type is Unit/Individual. Leave as is.
4. Click next.
5. Click on Unit field. Search for the unit (082(division)(flotilla) or select from the pull-down list. It is important this is correct because it effects reports.
6. Click activity type field and select activity.
7. Click opcon field and press E on the keyboard. (This will take you down the list to select Eight District – Eastern Region.) **Note – even though this may not show on screen it will take you to the right region)**
8. Review status – Leave as open.
9. Operations Code – WWW. Will be a pull down menu in the future**. (You may want to put this as an example from the previous version to be WWW/Panda/Coastie, etc. not just WWW)**
10. Click mission code field and press 1 on the keyboard. (This will take you to the 1st mission code that starts with a 1) **Scroll down to select to select the correct Category 10(x) Public Affairs mission code** and click on it to select.
11. Click on Date field and select the mission date.
12. Click on the Time field and select the mission time.
13. Click on the duration field and enter the duration. (you can mouse over the (i) icon to see how to enter portions of an hour.)
14. Click on the Summary of Activities and enter what you did. This is very important to explain what you did so the **FSO/SO-IS** can make sure you selected the right mission code.

15. Miles field entry **NOT APPLICABLE ON this type of mission. Report prep time on form 7029**
16. Cost field **NOT APPLICABLE ON this type of mission.**
17. Click Save.
18. Click the Member Assignment Tab.
19. Click on Search User and type in their information. (This is a specific search field so you must type in the exact information you are looking for or it will not find it. Typically use the last name or member ID number in this field.)
20. Click the check box next to the members name.
21. Click add members.
22. Click on the position field and select Lead.(IT IS VERY IMPORTANT TO SELECT THE CORRECT POSITION FOR ALL MEMBERS IN AN ACTIVITY.)
23. Click Update activity members.

7030 PE EVENT

1. From the main menu, click the Activities Log tab.
2. Click new. **(Upper right-hand corner)**
3. Default record type is Unit/Individual. Leave as is.
4. Click next.
5. Click on Unit field. Search for the unit (082(division)(flotilla) or select from the pull-down list. It is important this is correct because it affects reports.
6. Click activity type field and select activity.
7. Click opcon field and press E on the keyboard. (This will take you down the list to select Eight District – Eastern Region.) **Note – even though this may not show on screen it will take you to the right region)**
8. Review status – Leave as open.
9. Operations Code – ABS. Will be a pull down menu in the future.
10. Click mission code field and press 1 on the keyboard. (This will take you to the 1st mission code that starts with a 9) Scroll down to select a 14(x) mission code and click on it to select.
11. Click on Date field and select the mission date.
12. Click on the Time field and select the mission time.
13. Click on the duration field and enter the duration. (you can mouse over the (i) icon to see how to enter portions of an hour.)
14. Click on the Summary of Activities and enter what you did. This is very important to explain what you did so the **FSO/SO-IS** can make sure you selected the right mission code.
15. Miles field entry **NOT APPLICABLE ON this type of mission. Report prep time on form 7029**
16. Cost field **NOT APPLICABLE ON this type of mission.**
17. Click Save.
18. Click the Member Assignment Tab.
19. Click on Search User and type in their information. (This is a specific search field so you must type in the exact information you are looking for or it will not find it. Typically use the last name or member ID number in this field.)
20. Click the check box next to the members name.
21. Click add members.
22. Click on the position field and select Lead.(IT IS VERY IMPORTANT TO SELECT THE CORRECT POSITION FOR ALL MEMBERS IN AN ACTIVITY.)
23. Click Update activity members.

7038 WORKSHOP (4 HR TCT/OPERATIONS WORKSHOP, others EXAMPLE)

1. From the main menu, click the Activities Log tab.
2. Click new. (Upper right hand corner)
3. Default record type is Unit/Individual. Leave as is.
4. Click next.
5. Click on Unit field. Search for the unit (082(division)(flotilla) or select from the pull-down list. It is important this is correct because it affects reports.
6. Click activity type field and select activity.
7. Click opcon field and press E on the keyboard. (This will take you down the list to select Eight District – Eastern Region.) **Note – even though this may not show on screen it will take you to the correct region)**
8. Review status – Leave as open.
9. Operations Code – Will be a pull down menu in the future.
10. Click mission code field and press 0 on the keyboard.(This will take you to the 1st mission code that starts with a 0) Scroll down to select a (06A Ops workshop)and click on it to select.
11. Click on Date field and select the mission date.
12. Click on the Time field and select the mission time.
13. Click on the duration field and enter the duration. (you can mouse over the (i) icon to see how to enter portions of an hour.)
14. Click on the Summary of Activities and enter what you did. This is very important to explain what you did so the **FSO/SO-IS** can make sure you selected the right mission code.
15. Miles field entry **NOT APPLICABLE ON this type of mission. Report prep time on form 7029**
16. Cost field **NOT APPLICABLE ON this type of mission.**
17. Click Save.
18. Click the Related tab.
19. Under tasks, click New.
20. Under task type press 4. This will take you right to the 4/8 Hr TCT workshop code.
21. Click Save.
22. Click the Member Assignment Tab.
23. Click on Search User and type in their information. (This is a specific search field so you must type in the exact information you are looking for or it will not find it. Typically use the last name or member ID number in this field.)
24. Click the check box next to the members name.
25. Click add members.
26. Click on the position field and select Lead. (IT IS VERY IMPORTANT TO SELECT THE CORRECT POSITION FOR ALL MEMBERS IN AN ACTIVITY.)
27. Click Update activity members.
28. Click on the task capture tab.
29. Click on the task radio button.
30. Click assign member to task.
31. Click submit for approval button.
32. Enter detail comments.
33. Click submit button.