Activity Log Entry Quick Guide

(Note: The detail screen grid below provides reminder of the entries you need to check before submittal)

- From the Navigation Bar on the Top of your Home Page, Click "Activity Logs"
- A list will appear (Recently Viewed is the default). Click NEW on the upper right above the list.
- In the next pop-up, click "Activity"

Detail Screen:

Left Side of Screen				*Right Side of Screen*		
√	**Data Element**	**Instruction**		√	**Data Element**	**Instruction**
☐	Unit	Start Typing in Flotilla Name then pick from list		☐	Review Status	This will say "open" until you click "Submit"
☐	Activity Type	Select "Activity"		☐	Operations Code	Used for major events assigned a code, like hurricane responses.
☐	OPCON-	If a general activity start typing "Eleventh" then pick Eleventh District Southern from the list. District is the OPCON for most missions. Some Radio watch and other activities in direct USCG support use Sector or Station OPCON.		☐	Mission Code	Pick from the drop down or enter the number and pick from the list that comes up
				☐	Mission Location	Optional
				☐	Mission Start Date	Enter the date
				☐	Mission Start Time	This defaults to 12pm- you do not need to change it
				☐	Duration	Enter the hours and decimal hours for the mission
				☐	Remarks	Any comments or remarks you wish to enter
Scroll Down						
These next rows are to be used for activities that are reported with counts (VE, UPV, PE, etc. Provide the information as appropriate for the mission code used.						
Vessel Examination						
# Exams Given				*# First Time*		
# Exams Passed				*# High Focus*		
Program Visits						
# Program Visit						
ATON Verification						
# ATON Discrepancies				*# ATON Watching Properly*		
Public Education (only enter with last class/ exam)						

# Enrolled			# Enrolled Under 17	
# Completed			# Completed under 17	
State				
Public Affairs				
# Persons contacted			Event Description	
			☐	Remarks	Enter comments to briefly describe the mission
☐	Activity Approvers	Will default to FSO-IS and SO-IS for entering member after save. No need to enter manually.			
			☐		Click **SAVE**

- After you click "Save" you will see what you entered along with a Navigation Bar on the Left and an "Action" bar on the right.

Activity Log Navigation:

DETAIL   RELATED   MEMBER ASSIGNMENT   TASK CAPTURE

Member Assignment Screen:

☐   The Member List is on the top of the screen, members assigned to this activity log will identified at the bottom of the screen.

- Select one of the unit type buttons (e.g. Flotilla, Division, District etc.) or select from "ALL"
- Search the member by entering the member number or name in the box at the top.
- Put a check mark in the box to the left of the member's name that you want to assign to the mission
- Click "Add Member" Blue button to move that name into the space at the bottom.
- Repeat for additional Members on the mission
- Change the Default Position to Lead or Trainee as needed (default is non-lead).
- When done, click the Green "Update Activity Member" Button.

Task and Task Capture Screens: ****Workshops Only***

Most workshops are entered by the DIRAUX Office or their designees but if you happen to need to enter an in-classroom Core Training or Operations workshop, you will need to do the following.

- Enter the Detail Information as described Previously
- Enter the Member assignment including identification of the lead instructor and the other members who participated as Trainees.
- Go to Related and scroll down to the TASKS section. Click the "New" button on the far right. In the pop up, Pick the workshop from the Drop-down list under tasks and click SAVE
- Go to the task capture screen. Click the button to the left of the task. That will populate the table below with names from the member assignment. Leave all the names checked (check box to left of each name). Click Green "Assign Tasks to Members" button.

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READY to SUBMIT?????

- The Activity Log Status will be "open" until submitted. Once submitted the log is locked.
- In the Upper Right of all screens there is an Action Bar- Click the "Submit for Approval" button.
- You have the ability to add additional comments here as well.
- Once submitted, you will see the status change to "Under FSO-IS Review"

COPY Mission with Crew

- In the Action Bar there is a Carrot Symbol (▼)
- Click on the Symbol and pick "Clone" from the drop down.
- Edit the cloned record as appropriate and submit.

Recall Submittal

- Want to withdraw the submittal?
- Locate the Activity log you wish to recall and click on the AL-# link to open it
- Go to the RELATED section
- Scroll down to Approval History
- Click on the RECALL button on the far right

IS Officer only ACTIVITY LOG REVIEW/ APPROVAL

Creating a Custom list of Activity Logs requiring your review

From the Main Activity Log Screen

1. Click the down arrow next to the Activity Log header.
    a. One of the selections will be "Activity Logs Requiring my approval GEN"
    b. Click on this one to open it.
2. Go to the Action bar on the upper right and Click "Clone"
3. Go to the filters Add a filter to have Status = Under FSO IS Review.
4. Add a second Filter to have the FSO IS Name = Your name
5. PIN this report- this will mean that each time you access the Activity Log Object, you will open with your list of things needing review.

You can also link to an activity log requiring approval from the email you will receive when a member submits.

How to Review and Approve or Reject an Activity Log

1. There are 2 ways to get to the activity log that may be awaiting your approval
    a. When you get the email, click on the link in the email
    b. Pick the Activity Log off you list view (click on the AL-#)
2. Open the activity log
    a. Check the Detail Screen- is all data complete? Is the activity code correct?

       b.   Check the member assignment- have members been assigned? Do they show the correct position?

3.   Go to the Related Screen

       a.   Go to the activity Approval History

       b.   Click Approve or Reject. If Rejected the status will change to "Needs Clarification" and the form will be returned to the control of the member. You will be prompted to add comments or questions for which you seek clarification.

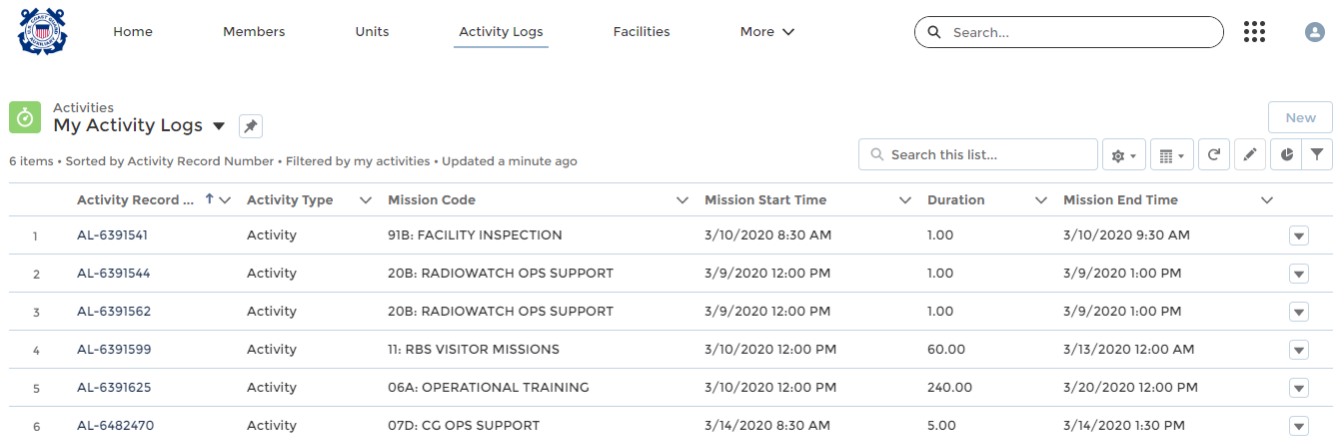   c.   Click the AL-# again to go back to the detail screen. You will see the status has changed.

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SCREEN SHOTS OF ACTIVITY LOG ENTRY SCREENS

In the following pages, screen shots have been prepared to walk through the process.
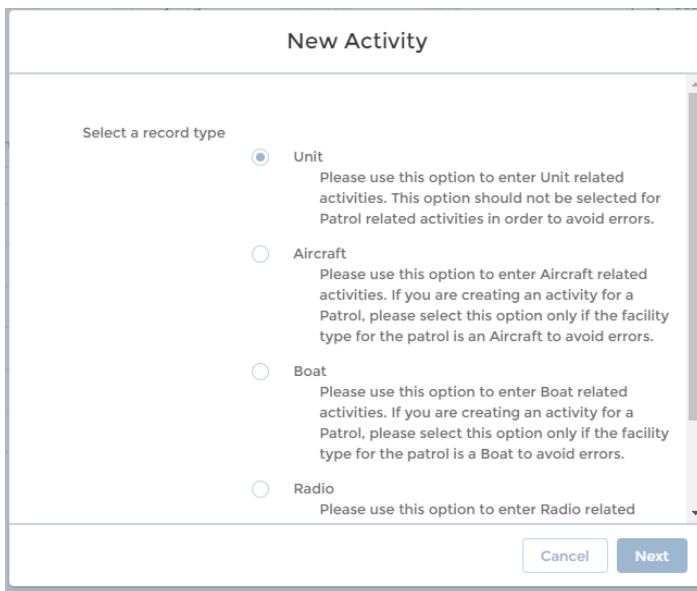
The Initial Activity Log Screen

To start and entry click on "New"

	Activity Record ... ↑∨	Activity Type ∨	Mission Code ∨	Mission Start Time ∨	Duration ∨	Mission End Time ∨	
1	AL-6391541	Activity	91B: FACILITY INSPECTION	3/10/2020 8:30 AM	1.00	3/10/2020 9:30 AM	▾
2	AL-6391544	Activity	20B: RADIOWATCH OPS SUPPORT	3/9/2020 12:00 PM	1.00	3/9/2020 1:00 PM	▾
3	AL-6391562	Activity	20B: RADIOWATCH OPS SUPPORT	3/9/2020 12:00 PM	1.00	3/9/2020 1:00 PM	▾
4	AL-6391599	Activity	11: RBS VISITOR MISSIONS	3/10/2020 12:00 PM	60.00	3/13/2020 12:00 AM	▾
5	AL-6391625	Activity	06A: OPERATIONAL TRAINING	3/10/2020 12:00 PM	240.00	3/20/2020 12:00 PM	▾
6	AL-6482470	Activity	07D: CG OPS SUPPORT	3/14/2020 8:30 AM	5.00	3/14/2020 1:30 PM	▾

Select Unit/ Individual

New Activity

Select a record type

○ Unit
Please use this option to enter Unit related activities. This option should not be selected for Patrol related activities in order to avoid errors.

○ Aircraft
Please use this option to enter Aircraft related activities. If you are creating an activity for a Patrol, please select this option only if the facility type for the patrol is an Aircraft to avoid errors.

○ Boat
Please use this option to enter Boat related activities. If you are creating an activity for a Patrol, please select this option only if the facility type for the patrol is a Boat to avoid errors.

○ Radio
Please use this option to enter Radio related

Cancel   Next

Detail Screen Top part (see previous Entry Instruction)

New Activity: Unit

Information

Activity Record Number

Review Status
Open

Unit

Operations Code

DANA POINT

Activity Type

Mission Code

Activity

08: ADMINISTRATIVE SUPPORT

View all dependencies

OPCON

Mission Location

AIR STATION CAPE COD

View all dependencies

* Mission Start Time
Date   Time

Cancel   Save & New   Save

More of the Detail Screen (Scroll Down)

New Activity: Unit

AIR STATION CAPE COD

View all dependencies

* Mission Start Time
Date   Time

3/19/2020   0700

* Duration

6.00

Remarks

work in training office

General Unit Activity Details

Number of Exams Given   First Time

Number of Exams Passed   High Focus

Cancel   Save & New   Save

Click SAVE

See Navigation Bar in upper left- Click on Member Assignment

Mission Code Description

DETAILS   RELATED   MEMBER ASSIGNMENT   TASK CAPTURE
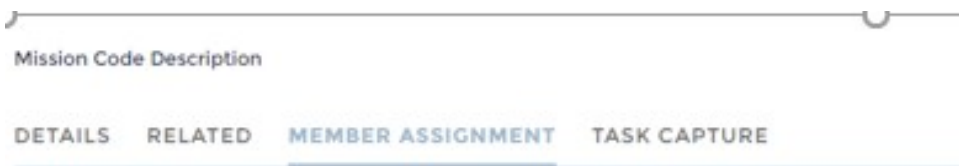
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Member Assignment- Search for members on the mission by name or Member #

Mission Code Description

DETAILS   RELATED   **MEMBER ASSIGNMENT**   TASK CAPTURE

Member Assignment

Search User

🔍 hansen   ⊗

Unit Level

| All | District | Division | Flotilla | Internal | National |

□	Member ID	⌄	Members Name	⌄	Unit Number
□	1171856		DARREL HANSEN		0913004
□	1221739		DAVID EARL HANSEN		0912603
□	1206465		DAVID TAYLOR HANSEN		1301003
□	1166226		DENNIS H HANSEN		0911801
□	1052131		DOUGLASS ROBERT HANSEN		0540510
□	1144384		ERIC A JOHANSEN		0130605

Click on the box to the left of the name and then the blue button   to assign the member to the mission.

Add Members

Same Screen (scroll down)- When the correct members have been assigned and the positions assigned (Lead, Non-Lead, etc.), Click the Green Button to complete the transaction.

□	Member Id	Name	Position
□	1145552	LAUREL J CARLSON	NON LEAD ▼

Remove

Update Activity Members

SUBMIT- Upper Right Action Bar (no screen shot)- Click Submit for Approval.

Search...

+ Follow   Submit for Approval   Delete   Edit   ▼