

Commanding Officer
U.S. Coast Guard
Operations Systems Center
Kearneysville, WV 25430



AUXDATA Order Management Overview Guide

Version 2.0

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1. PREFACE

1.1 Purpose

This document provides United States Coast Guard (USCG) Auxiliary users with instructions and information necessary to use AUXDATA Order Management (AOM). AOM is a module located inside of Auxiliary Data (AUXDATA). The goal of this document is to provide the Auxiliary with an Overview Guide for training new personnel and guidelines for using AOM.

1.1.1 Purpose of AOM

For Auxiliarists and crew, who provide support to the USCG, AOM is a Web-based software module that allows for the creation, authorization, and reimbursement of patrol orders and management of budget allocations at the Sector and District levels. The AOM user base is estimated at 5,500 users with approximately 25 concurrent users at any one time.

The purpose of AOM is to:

- Automate and streamline the entire Auxiliary patrol order/claims process, from the time an Auxiliarist requests orders until they receive their reimbursement. AOM replaces manual (paper-based) claims processes that were labor intensive, time consuming, and error prone.
- Provide report capabilities to assist Auxiliary leaders and USCG managers in ensuring the effective and efficient use of Auxiliary resources.

1.2 Intended Audience

The following is a list of groups for whom this document was created:

- Assistant Commandant of Operations
- Office of Auxiliary
- District Director of Auxiliary (DIRAUX)
- Order Issuing Authority (OIA)
- Facility Owner/Operator
- AOM User.

1.3 Style Conventions

This document uses specific type styles to differentiate commands, directory names, and so forth from the main text. The [OSC Documentation SOP](#) describes the use of type styles used within this document.

***NOTE:** In the figures appearing in this guide, some information (names, contact information, and so on) has been blurred. The information is visible in the application.*

1.4 Security and Privacy

The AOM module has increased security features. The ability to create, read, update, and delete data in the centralized system is based on the user's role and position. User Identification (ID) and passwords to the system indicate the allowable permission level a user has and prevent users from performing any actions in AOM beyond the scope of their permissions.

The USCG has migrated to a Web-based environment using the USCG Standard Workstation III (SWIII). AOM, which is a Solaris-Oracle Internet Explorer (IE) module, is Web-based (public facing) and runs on any workstation or laptop that supports the Microsoft (MS) IE Web browsers, IE7 and above, which includes all SWIII computers.

2. AOM FUNCTIONALITY

AOM has its own built-in navigational tools, which include various menus and return links. The menu items and the return links (when available) allow users to navigate while logged in to the system. Buttons represent all menu items and return links. When clicked with the mouse, the buttons link to a new page or a previous part of the module.

NOTE: *This section covers actions and procedures for all access levels. Not all users have permissions to perform all of the procedures in this section. To easily view permissions, click the **My Account** button in the AOM main menu (discussed in [Section 2.2.6, My Account](#)).*

2.1 Logging In to AOM

AOM is accessed through a Web browser on a Personal Computer (PC) or a USCG SWIII. To access AOM, perform the following steps:

1. Use the following link to access the AOM Production module: <https://ordermgmt.uscg.gov/>.

NOTE: *Users can explore AOM and practice using its tools through the AOM Training module, which can be accessed through the following link: <https://ordermgmt-train.uscg.gov/>. The AOM Training module is not for actual orders. For actual orders, use the [AOM Production module](#).*

The unauthorized access warning appears, similar to the following:

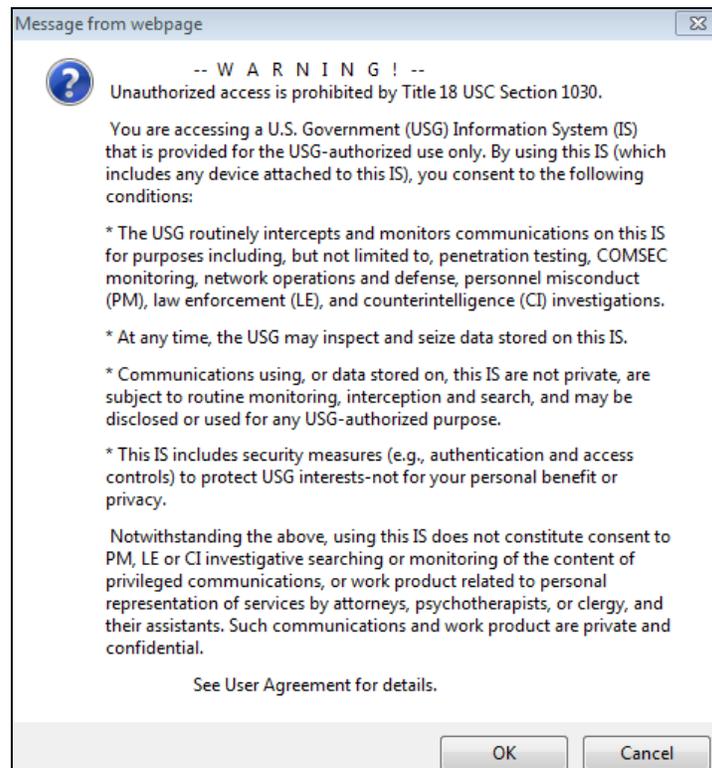


Figure 2-1 Unauthorized Access Warning

2. Read the warning, and then click **OK** to continue.

The Access to AOM screen appears, similar to the following:

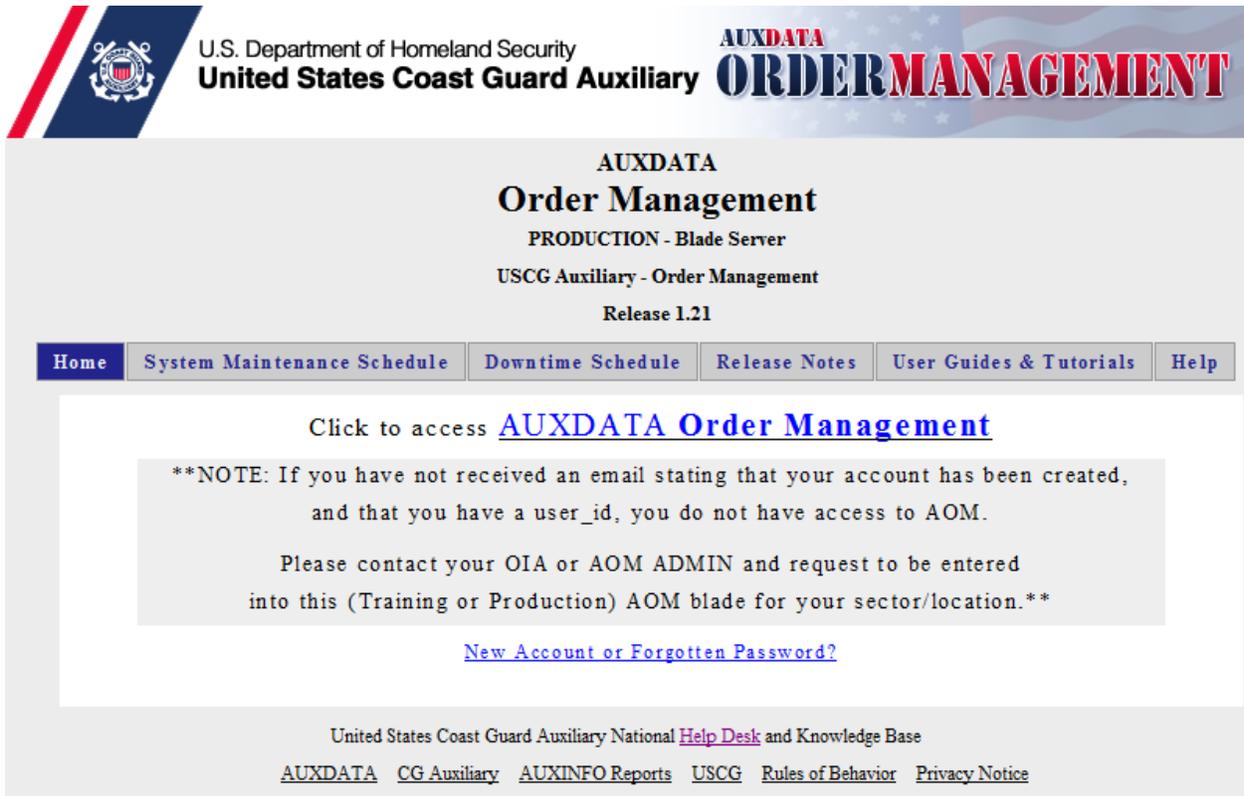


Figure 2-2 Access to AOM

3. Click the **AUXDATA Order Management** access link.

The Login screen appears, similar to the following:

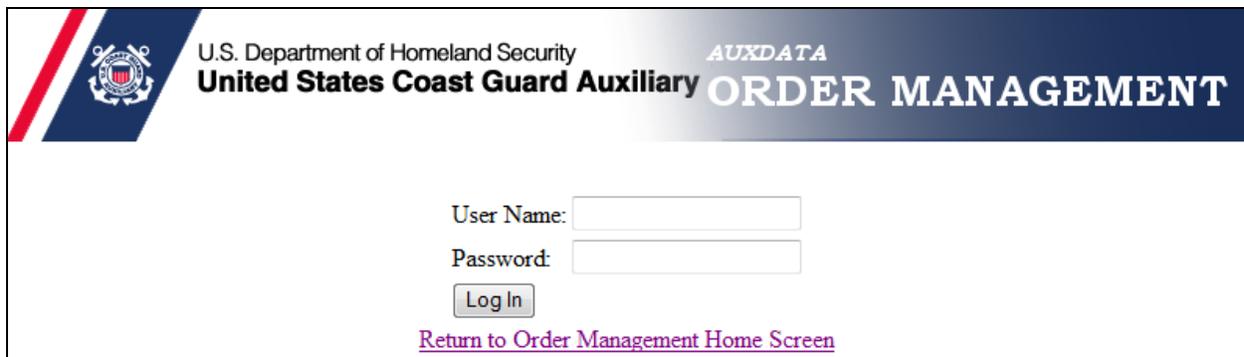


Figure 2-3 AOM Login Screen

4. Enter the following information, and then click **Log In**:
 - In the **User Name** field, enter a {user name}.
 - In the **Password** field, enter a {password}.

NOTE: An account will be locked after three failed login attempts. If a password is forgotten, reset it using the procedure in [Section 2.1.1, Password Reset](#).

- If a user has multiple available locations, the Location Selection screen appears similar to [Figure 2-4](#). Users without multiple locations go directly to the AOM main menu, as shown in [Figure 2-5](#).

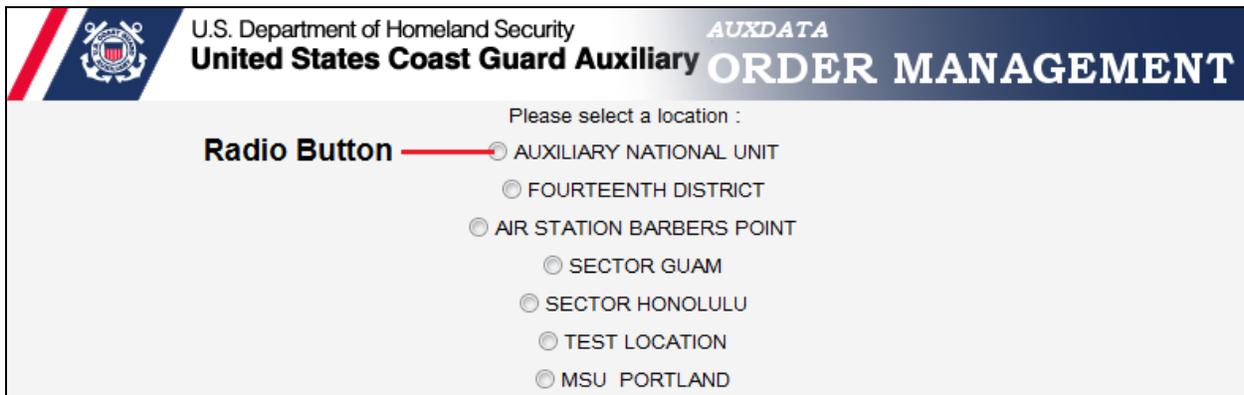


Figure 2-4 Location Selection Screen

- If multiple locations appear, click the radio button beside the appropriate {location}.

After successfully logging in, the AOM main menu appears, similar to the following:

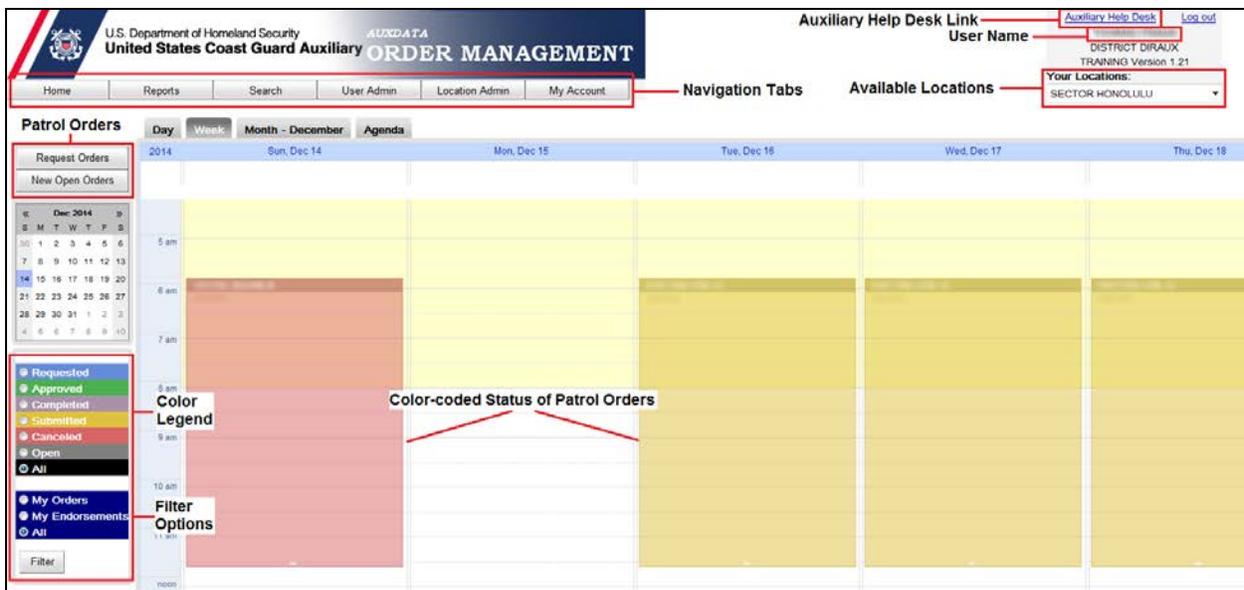


Figure 2-5 AOM Main Menu

NOTE: The example in [Figure 2-5](#) shows the available options for a District DIRAUX. Certain tabs and buttons shown in the figure and functions discussed below may or may not be available depending on a user's role and permissions.

2.1.1 Password Reset

When a new account is added to a location, the user receives an automated email message with their new username. Upon receipt of that email message, the user will use the **Password Reset** tool located on the Access to AOM screen as shown in [Figure 2-2](#). The same procedure is used for a forgotten password. Perform the following steps to reset a user password:

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1. Click the **New Account or Forgotten Password?** link on the Access to AOM screen.

The Password Reset screen appears, similar to the following:

AUXDATA
Order Management
PRODUCTION - Blade Server
USCG Auxiliary - Order Management
Release 1.22

[Home](#) | [System Maintenance Schedule](#) | [Downtime Schedule](#) | [Release Notes](#) | [User Guides & Tutorials](#) | [Help](#)

To use this tool, you must have a valid email address in AUXDATA or AUXDATA ORDER MANAGEMENT:

1. Enter your Member ID
2. Enter your Username (usually, first initial + last name, example: Edgar Allen Poe = EPOE)
3. Click Submit

Member ID :

Username :

Your account will be unlocked and a new password will be emailed to your first email address shown in AUXDATA - Order Management.

****NOTE: If you have an AUXDATA account and an Order Management account your username and password are the same. Both will be reset when you use this tool. Having one account does not however mean you have accounts for both. You must request access and receive confirmation of creation to access either.****

United States Coast Guard Auxiliary National [Help Desk](#) and Knowledge Base

Figure 2-6 Password Reset Screen

2. Enter the following information:
 - In the **Member ID** field, enter the {member ID number}.
 - In the **Username** field, enter the {username}.
3. Click **Submit**.

The user's account is unlocked, and a new password is emailed to the first email address shown in AOM.

NOTE 1: An account will be locked after three failed login attempts. If the user forgets his/her password, he/she should follow the steps above to reset it.

NOTE 2: User passwords must be changed every 90 days. After 180 days of inactivity, the user account will be locked. After 365 days of inactivity, the user account will be dropped (expired).

NOTE 3: The {username} of a first-time user will (usually) be his/her first initial followed by his/her last name. For example, John Smith's {username} would be **jsmith**. The temporary password for a first-time user will be randomly generated and provided to

the user of the account at their AUXDATA email address. The system will prompt the user to change his/her temporary password at the first login.

2.2 Main Menu Navigational Tools

Click any of the AOM main menu options to use each tool. A general description of each mouse-activated menu option is listed in the following subsections.

2.2.1 Home

The **Home** button allows users to view daily, weekly, and monthly calendars and agendas through those respective tabs on the **Home** page. The calendar is color-coded and allows users to filter by patrol order status (Requested, Approved, Completed, Submitted, Canceled, Open, and All), by the user's orders, and by the user's endorsements, as shown in [Figure 2-5](#). To use the filter, simply click the appropriate radio button to select the filter type, and then click **Filter**. The calendar will show just the items matching the filter criteria.

Agendas for approved orders can be viewed by specific dates and sub units through the **Agenda** tab. Clicking the **Agenda** tab yields a screen similar to the following:

Figure 2-7 Approved Orders Agenda

Clicking the Order Number opens the patrol order. [Section 3, Patrol Orders \(Owner/Operator and OIA\)](#), describes the procedures of the various aspects of patrol orders.

2.2.2 Reports

The **Reports** button allows users to view Patrol Status and Member Activity reports according to their permissions. Clicking the **Reports** button yields a screen with search options similar to the following:

Figure 2-8 Report Search Screen

2.2.2.1 Searching Reports

Perform the following steps to search for reports:

1. On the Report Search screen, click the appropriate radio button to select the search criterion (**Member ID**, **Last Name**, **Facility Hull/Tail Number [HTN]**, **Order Number**).
2. Select a {fiscal year} using the **Fiscal Year** picklist.
3. In the **Search** field, enter the {search information}, and then click **Search**.

The search results appear, similar to the following:

Location	Order Number	Mission Type	Order Status	Facility HTN	Position	Member ID	Member Name	In Use Dates	In Use Times	Overlap
SECTION NAME	100000	01	SUBMITTED	00000000	LEAD	100000	MEMBER NAME	10/25/14 10/25/14	1000-1600	
SECTION NAME	100000	01	SUBMITTED	00000000	NON LEAD	100000	MEMBER NAME	10/25/14 10/25/14	1000-1600	
SECTION NAME	100000	01	SUBMITTED	00000000	NON LEAD	100000	MEMBER NAME	10/25/14 10/25/14	1000-1600	
SECTION NAME	100010	001	SUBMITTED	00000000	LEAD	100000	MEMBER NAME	10/03/14 10/03/14	800-1600	

Figure 2-9 Report Search Results

2.2.3 Search

The **Search** button allows users to search for **Members**, **Facilities**, and **Orders** through those respective tabs.

2.2.3.1 Searching for Members

Clicking the **Members** tab yields a screen similar to the following:

Member ID	Name	Email
-----------	------	-------

Figure 2-10 Member Search Screen

Perform the following steps to search for members:

1. On the Member Search screen, click the appropriate radio button to search by **Member ID** or **Last Name**.

- In the **Search** field, enter the {search information}, and then click **Search**.

The search results appear, similar to the following:

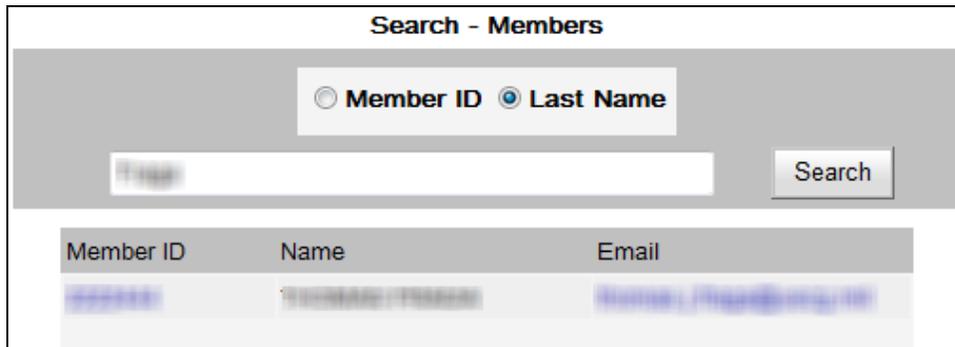


Figure 2-11 Member Search Results

- To view member information, click the Member ID.

A **Member Information** window appears, similar to [Figure 2-12](#). If the member is active duty, this window will not appear and there will be a message stating the member is active duty.

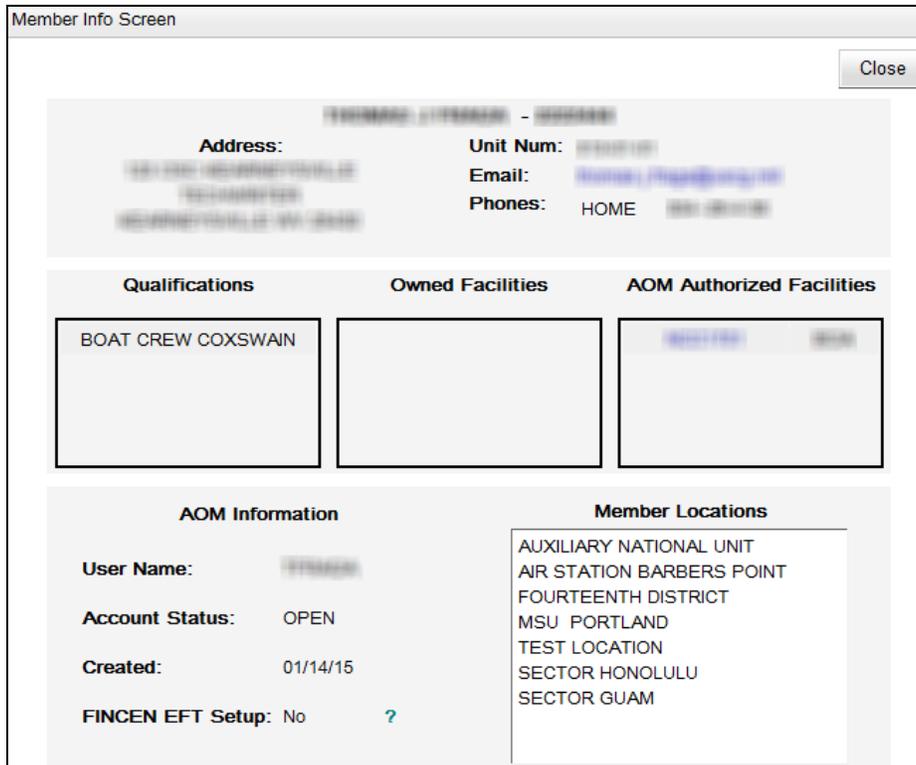


Figure 2-12 Member Information Window

NOTE 1: At the bottom of the **Member Information** window is a question mark beside the Finance Center (FINCEN) Electronic Funds Transfer (EFT) Setup information. Hovering the mouse cursor over the question mark opens a small window with information about EFT in AOM, similar to the following:

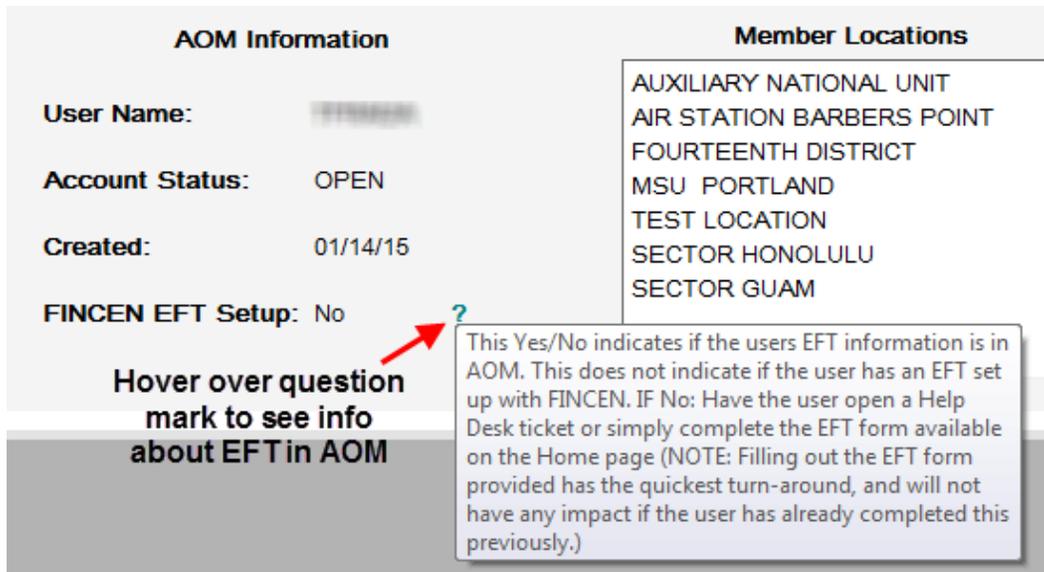


Figure 2-13 Information About EFT in AOM

NOTE 2: The EFT form can be found through the *User Guides & Tutorials* tab on the Access to AOM screen ([Figure 2-2](#)).

NOTE 3: Clicking a facility ID in the *AOM Authorized Facilities* box yields a **Facility Information** window similar to [Figure 2-18](#). See [Section 2.2.3.2, Searching for Facilities](#), for information on searching for facilities.

4. After viewing the member information, click **Close** to return to the search results.
5. To send a message to the member, click their **Email** address in the search results similar to [Figure 2-11](#) or in the **Member Information** window similar to [Figure 2-12](#).

The AOMS User to User Message window appears, similar to the following:

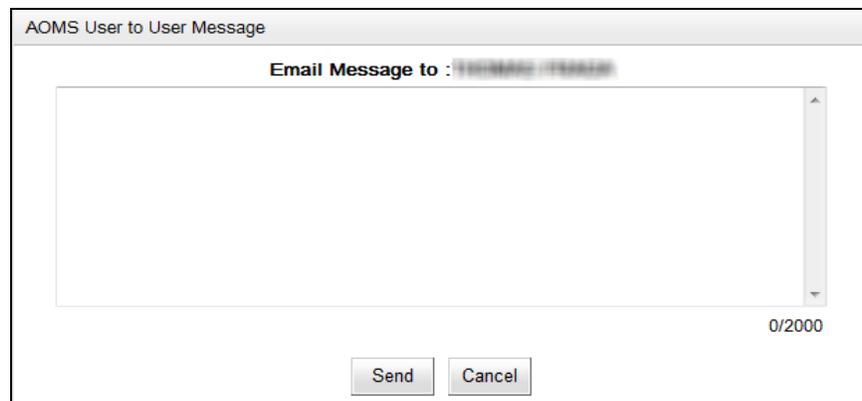


Figure 2-14 AOMS User to User Message Window

6. Enter {the message}, and then click **Send**.

NOTE: There is a 2,000-character limit (including spaces).

A confirmation appears, similar to the following:

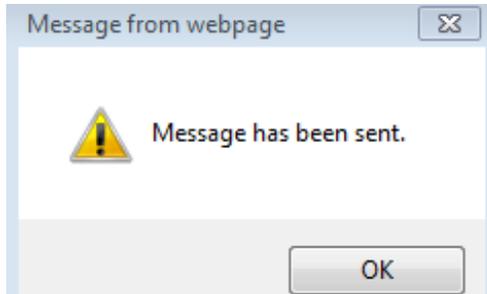


Figure 2-15 Message Sent

7. Click **OK**.

2.2.3.2 Searching for Facilities

Clicking the **Facilities** tab yields a screen similar to the following:

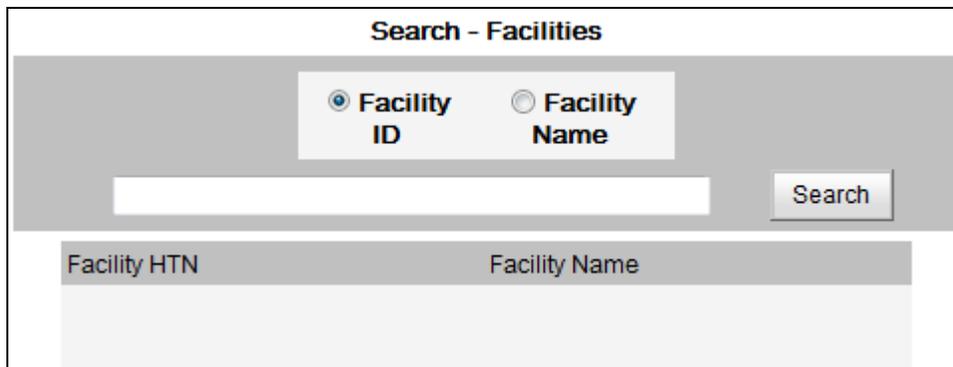


Figure 2-16 Facilities Search Screen

Perform the following steps to search for facilities:

1. On the Facilities Search screen, click the appropriate radio button to search by **Facility ID** or **Facility Name**.
2. In the **Search** field, enter the *{search information}*, and then click **Search**.

The search results appear, similar to the following:

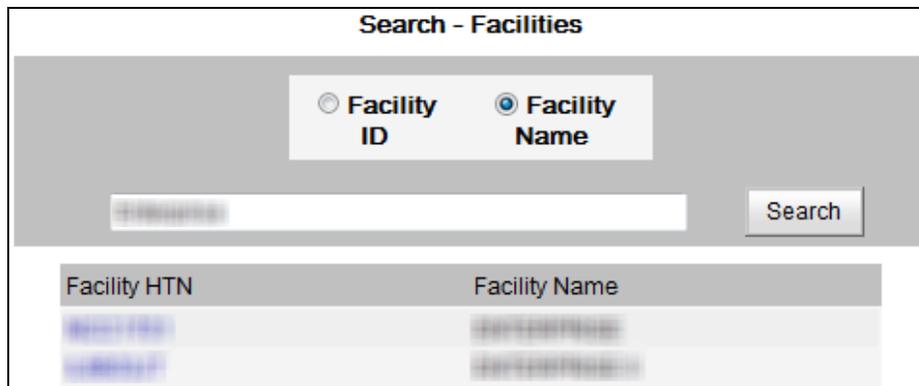


Figure 2-17 Facilities Search Results

- To view facility information, click the Facility HTN.

A **Facility Information** window appears, similar to the following:

The screenshot shows a window titled "Facility Info Screen" with a "Close" button in the top right corner. The main content area is titled "Facility Information" and contains the following fields:

Facility HTN:	123456	Facility Class:	BOA
Facility Name:	ENTERPRISE	Manufacturer:	EARTH
Call Sign:	123456	Model:	STARSHIP
Inspection Date:	12/14/14	Description:	CRUISER
Location:		Number of Engines:	1
Availability:		Trailerable:	N
SAMA Type:	G	Min Crew:	3

Below the facility information, there are two sections: "Owners" and "AOM Authorized Users". Each section contains a table with columns for "Member ID" and "Member Name".

Figure 2-18 Facility Information Window

NOTE 1: Clicking the member ID beside the member name yields a **Member Information** window similar to [Figure 2-12](#). See [Section 2.2.3.1, Searching for Members](#), for information on searching for and contacting members.

NOTE 2: "AOM Authorized Users" means only those members qualified as an operator for that type of facility and authorized by the owner, in writing on the Offer for Use form, to operate the facility when the owner is not on board.

- After viewing the facility information, click **Close** to return to the search results.

2.2.3.3 Searching for Orders

Clicking the **Orders** tab yields a screen similar to the following:

The screenshot shows a window titled "Search - Orders". It features a search criteria section with radio buttons for "Member ID" (selected), "Sub Unit", "Facility HTN", "Order Number", and "OIA Signature". To the right, there are "From" and "To" date fields with values "01/01/2015" and "01/27/2015" respectively. A "Search" button is located below the criteria. Below the search section is a table with the following columns:

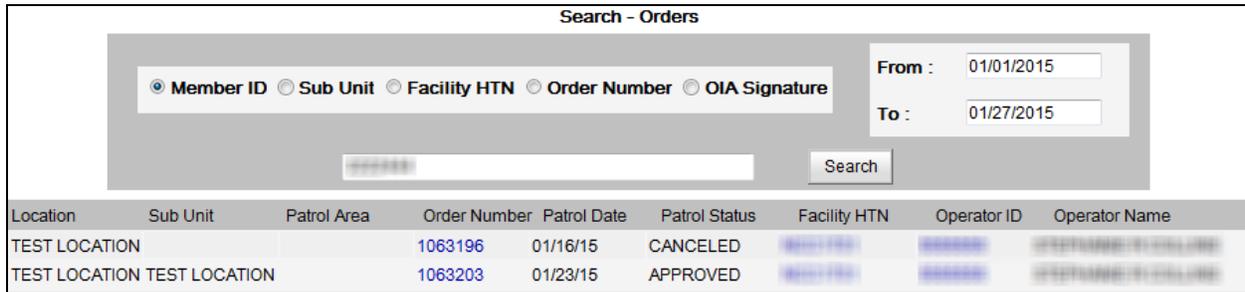
Location	Sub Unit	Patrol Area	Order Number	Patrol Date	Patrol Status	Facility HTN	Operator ID	Operator Name

Figure 2-19 Orders Search Screen

Perform the following steps to search for orders:

1. On the Orders Search screen, click the appropriate radio button to search by **Member ID**, **Sub Unit**, **Facility HTN**, **Order Number**, or **OIA Signature**.
2. In the **From** and **To** fields, specify a date range.
3. In the **Search** field, enter the {search information}, and then click **Search**.

The search results appear, similar to the following:



The screenshot shows a web interface titled "Search - Orders". At the top, there are radio buttons for search criteria: "Member ID" (selected), "Sub Unit", "Facility HTN", "Order Number", and "OIA Signature". To the right, there are input fields for "From" (01/01/2015) and "To" (01/27/2015). Below these is a search input field and a "Search" button. The results are displayed in a table with the following columns: Location, Sub Unit, Patrol Area, Order Number, Patrol Date, Patrol Status, Facility HTN, Operator ID, and Operator Name.

Location	Sub Unit	Patrol Area	Order Number	Patrol Date	Patrol Status	Facility HTN	Operator ID	Operator Name
TEST LOCATION			1063196	01/16/15	CANCELED	View Info	View Info	View Info
TEST LOCATION	TEST LOCATION		1063203	01/23/15	APPROVED	View Info	View Info	View Info

Figure 2-20 Orders Search Results

NOTE: Clicking a *Facility HTN* yields a **Facility Information** window similar to [Figure 2-18](#).
Clicking an *Operator ID* yields a **Member Information** window similar to [Figure 2-12](#).

4. To view an order's details, click the Order Number.

The patrol order opens in a new window. [Section 3, Patrol Orders \(Owner/Operator and OIA\)](#), describes the procedures of the various aspects of patrol orders.

2.2.4 User Admin

The **User Admin** button allows authorized users to add names to the unit, remove names from the unit, and set and edit user roles and permissions based on the administrator's permissions level. For example, a DIRAUX can create permissions for another DIRAUX and below, and an OIA can create permissions for another OIA and below.

Clicking the **User Admin** button yields a screen similar to the following:

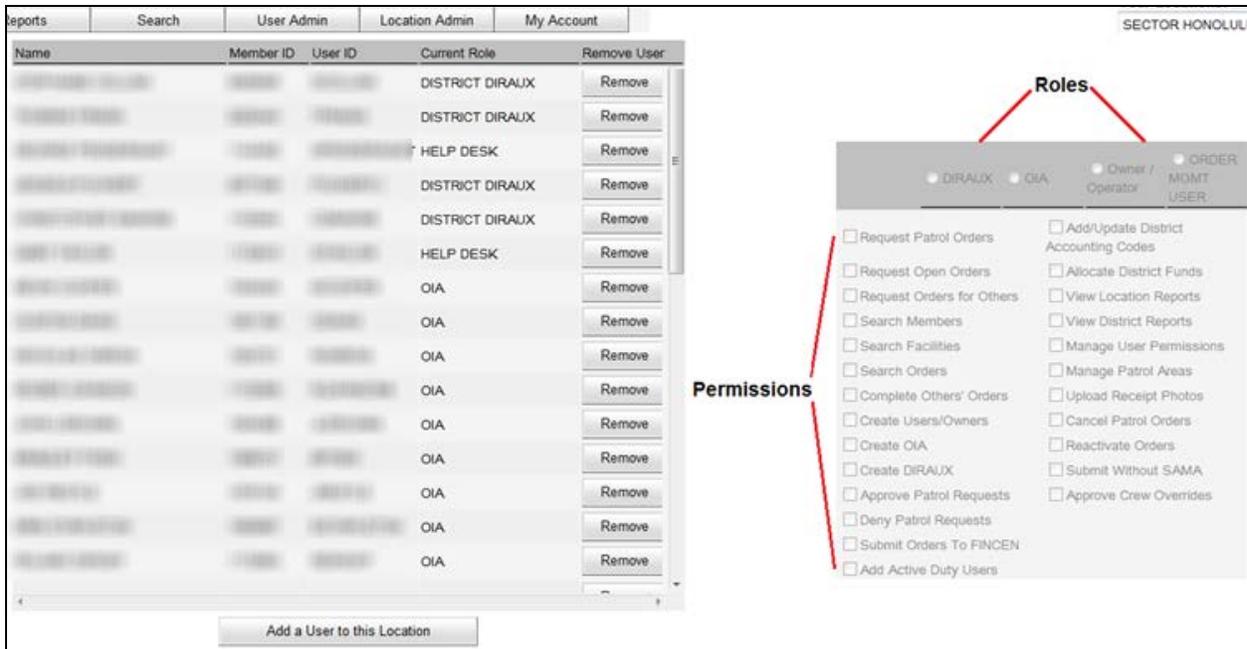


Figure 2-21 User Admin Screen

Selecting a {user} in the list on the left of the User Admin screen reveals his/her roles and permissions in the box on the right of the screen.

2.2.4.1 Add a User to a Location

Perform the following steps to add a user to a location:

1. Under the list of names on the User Admin screen, click **Add a User to this Location**.

The Available Users List appears, similar to the following:

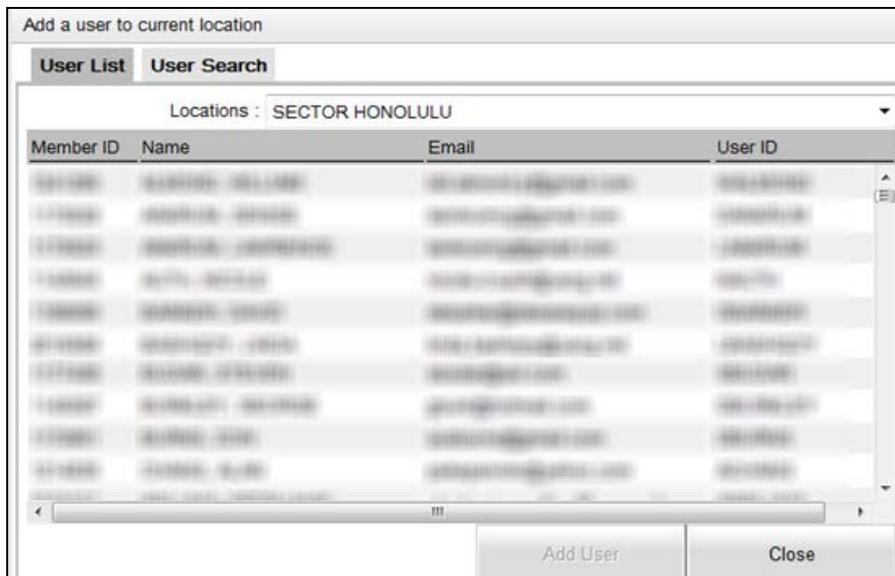


Figure 2-22 Available Users List

2.2.4.1.1 Adding a User With the User List Tab

Perform the following steps to add a user with the **User List** tab at the top left of the **Available Users List** (see [Figure 2-22](#)).

1. Select the appropriate *{name}* in the list, and then click **Add User**.

A confirmation appears, similar to the following:

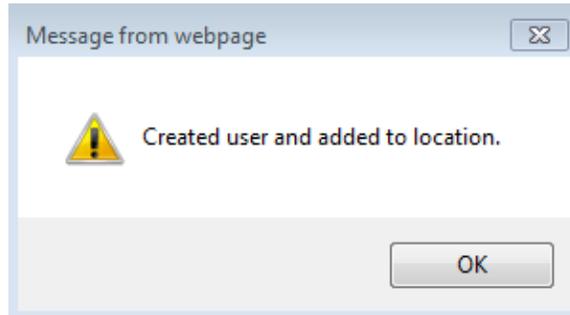


Figure 2-23 User Created and Added Message

2. Click **OK**.

The user is added to the list of users in the subscribed location.

NOTE 1: The default for any new user (active duty or Auxiliary) is *ORDER MGMT USER*, which is read-only. The person creating the new user then has to grant that member the proper permissions if the member is *Owner/Operator* or above. For instructions on managing permissions, see [Section 2.2.4.3, User Admin Permissions](#).

NOTE 2: If the user already exists at the location, a message similar to [Figure 2-24](#) appears. Click **OK**.

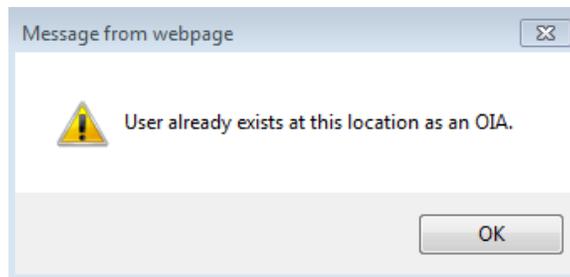


Figure 2-24 User Already Exists Message

2.2.4.1.2 Adding a User With the User Search Tab

Perform the following steps to add a user with the **User Search** tab at the top left of the **Available Users List** (see [Figure 2-22](#)).

1. Click the **User Search** tab.

The User Search window appears, similar to the following:

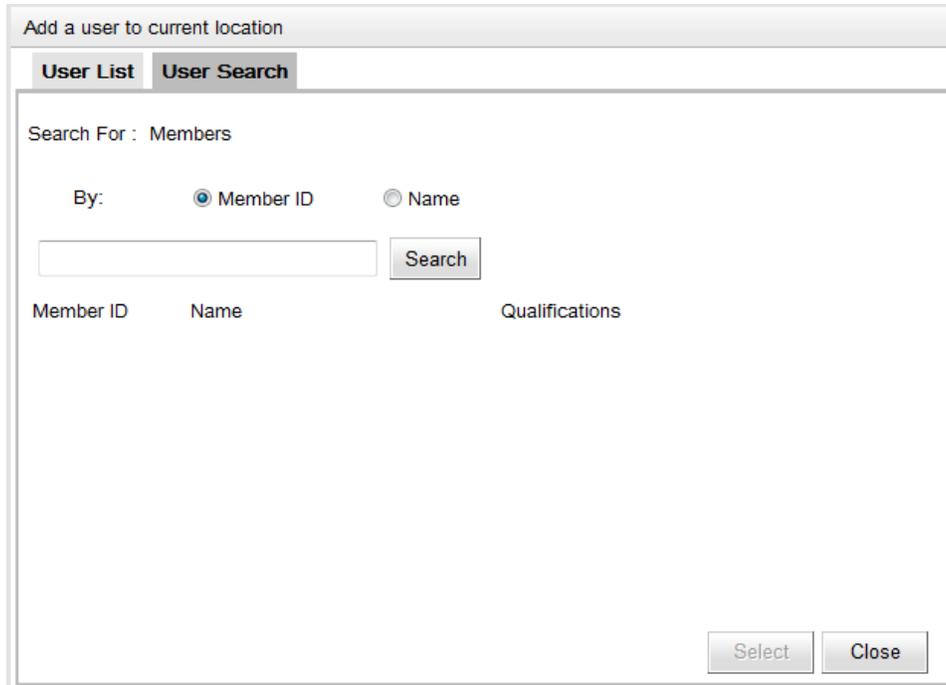


Figure 2-25 User Search Window

2. Click the appropriate radio button to search by **Member ID** or Last **Name**.
3. In the **Search** field, enter the *{search information}*, and then click **Search**.

The search results appear, similar to the following:

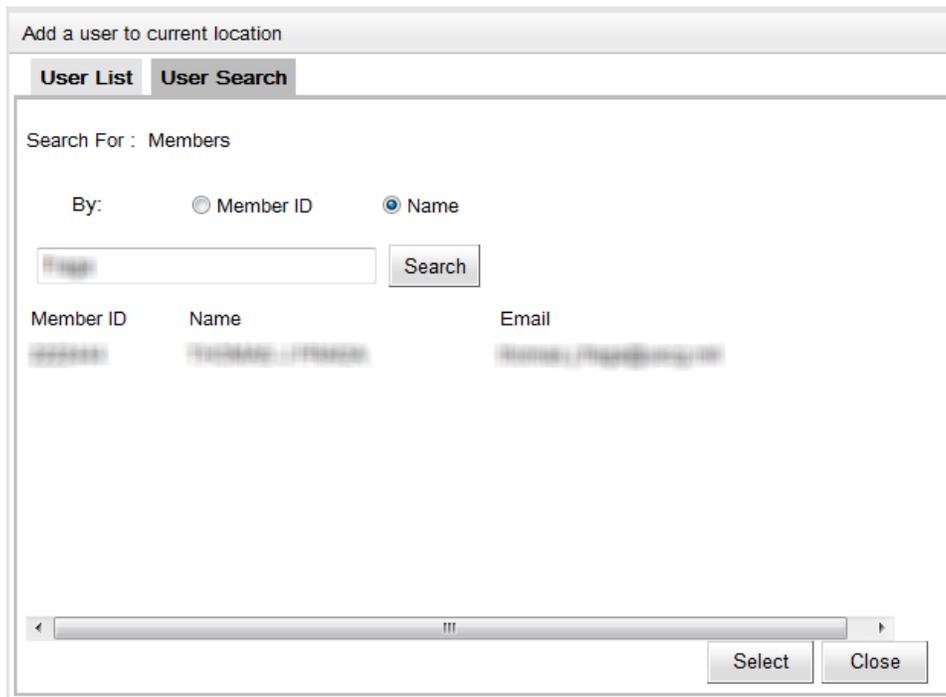


Figure 2-26 User Search Results

4. Click the appropriate *{name}*, and then click **Select**.

A confirmation appears, similar to [Figure 2-23](#).

5. Click **OK**.

The user is added to the list of users in the subscribed location.

2.2.4.2 Removing a User

To remove a user, perform the following steps:

1. In the list of names on the User Admin screen (see [Figure 2-21](#)), click the **Remove** button beside the *{user}* to be deleted.

A confirmation appears, similar to the following:

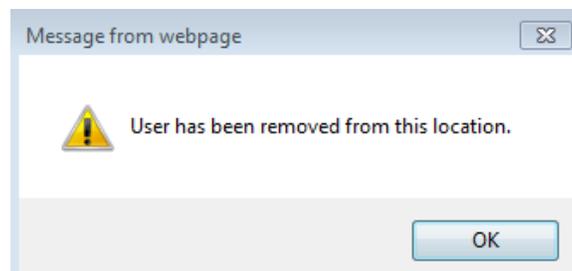


Figure 2-27 User Removal Message

2. Click **OK**.

2.2.4.3 User Admin Permissions

The User Admin can add or delete specific permissions for individual users. Selecting an existing user on the User Admin screen shows the user's current permissions in the box on the right of the screen, similar to [Figure 2-21](#).

Perform the following steps to edit the roles and permissions:

1. Use the radio buttons and check boxes to select or de-select roles and permissions.

A confirmation appears, similar to the following:

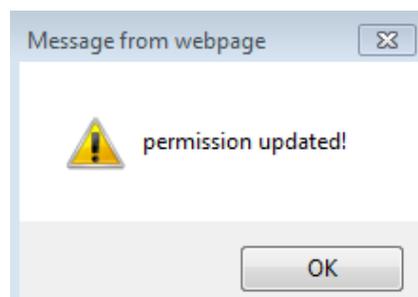


Figure 2-28 Update Message

2. Click **OK**.

2.2.5.2 Location Standard Auxiliary Maintenance Allowance (SAMA) Forecast

Clicking the **Location SAMA Forecast** tab yields a screen similar to the following:

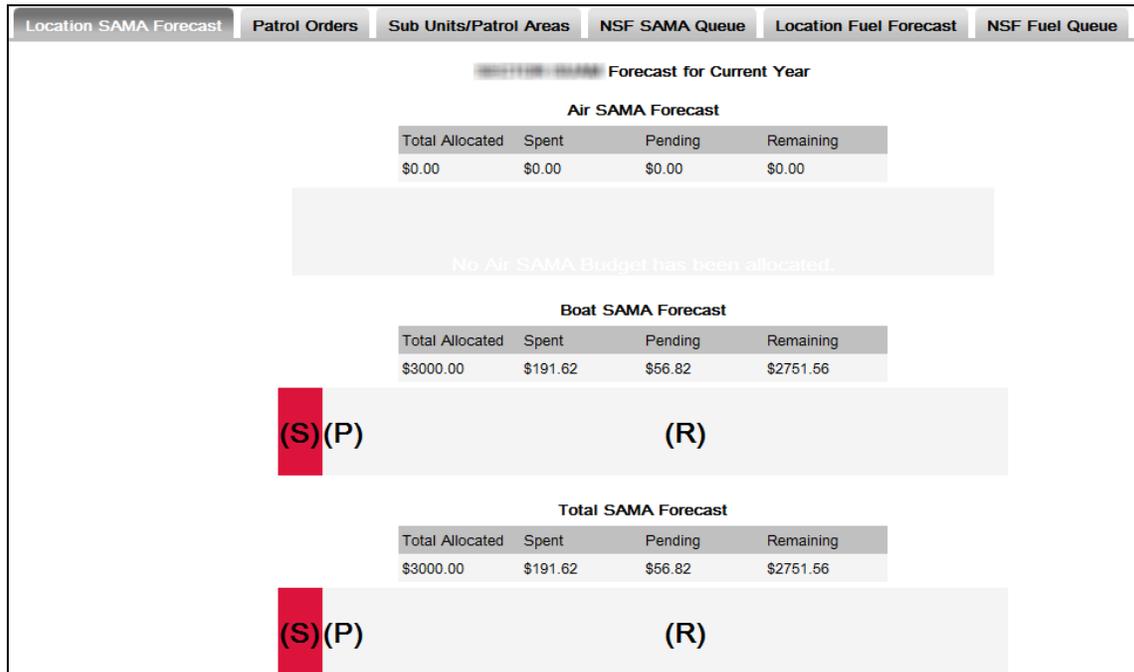


Figure 2-31 Location SAMA Forecast Screen

NOTE: (S) stands for *Spent*, (P) stands for *Pending*, and (R) stands for *Remaining*. Pointing the mouse cursor to each letter in the budget progress bar reveals a short message with budget details, similar to the following:

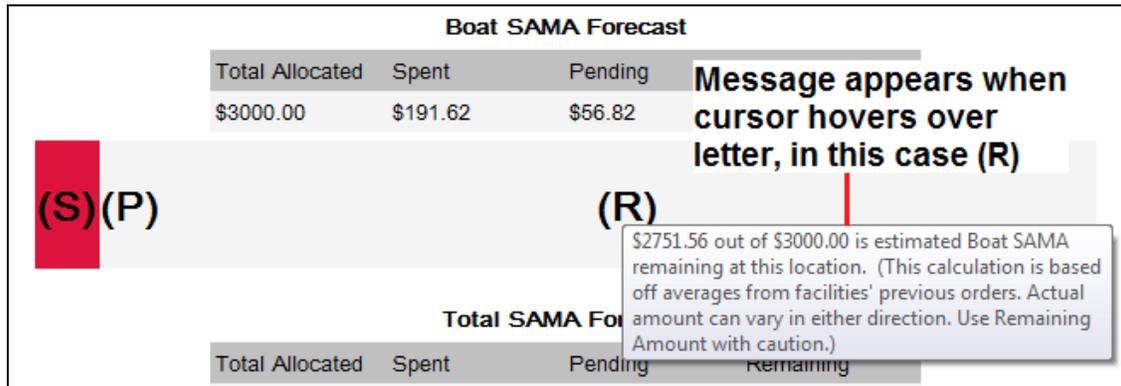


Figure 2-32 Budget Progress Bar Message

2.2.5.3 Patrol Orders

Clicking the **Patrol Orders** tab yields a screen similar to the following:

Pending Approval									
Order Num	Facility	Patrol Date	Patrol Time	Patrol Area	Operator	Comments	Submitter	Submit Date	
10000000	10000000	01/17/15	MORNING	10000000	10000000		10000000	01/15/15	

Pending Submission to FINCEN									
Order Num	Facility	Patrol Date	Patrol Time	Patrol Area	Operator	Comments	OIA Signed	OIA Sign Date	
10000000	10000000	06/24/14	MORNING	10000000	10000000	The CG Auxiliary will be assisting during a "oscar" Tasking: to deploy an "oscar" approximately 5 miles offshore, report a MOB to COMCEN, and monitor response of search team. GAR was 20.			

Figure 2-33 Patrol Orders Screen

To view a specific order's details, click the **Order Number**.

The patrol order appears in a new window. [Section 3, Patrol Orders \(Owner/Operator and OIA\)](#), describes the procedures of the various aspects of patrol orders.

2.2.5.4 Sub Units/Patrol Areas

Clicking the **Sub Units/Patrol Areas** tab yields a screen similar to the following:

Location Detail	Location SAMA Forecast	Patrol Orders	Sub Units/Patrol Areas	NSF SAMA Queue	Location Fuel Forecast	NSF Fuel Queue				
Sub Unit Management <input type="checkbox"/> Show Inactive Sub Units? <table border="1"> <thead> <tr> <th>Sub Unit Name</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table> <input type="button" value="Add Sub Unit"/> Sub Unit Name : <input type="text"/> <input type="checkbox"/> Active			Sub Unit Name	Status			Patrol Area Management <input type="checkbox"/> Show Inactive Patrol Areas? Location/ Sub Unit : <input type="text"/> <input type="button" value="Add Patrol Area"/> For Location/ Sub Unit : <input type="text"/> <input type="checkbox"/> Active Patrol Area Name : <input type="text"/> Patrol Area Description : <input type="text"/>			
Sub Unit Name	Status									

Figure 2-34 Sub Units/Patrol Areas Screen

NOTE 1: To view inactive sub units, click the **Show Inactive Sub Units?** checkbox under the **Sub Unit Management** heading.

NOTE 2: To view inactive patrol areas, click the **Show Inactive Patrol Areas?** checkbox under the **Patrol Area Management** heading.

2.2.5.4.1 Add a Sub Unit to a Location

Perform the following steps to add a sub unit to a location:

1. On the left of the Sub Units/Patrol Areas screen similar to [Figure 2-34](#), click **Add Sub Unit**.
2. Enter the {sub unit name} in the **Sub Unit Name** field, and then click **Save**.

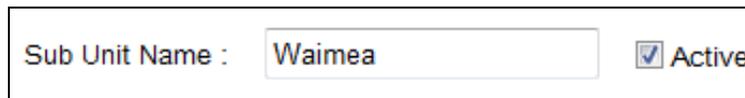
*The new sub unit appears as “Active” in the **Sub Unit** field.*

2.2.5.4.2 Activate/Deactivate a Sub Unit

Perform the following steps to change the status of a sub unit:

1. On the left of the Sub Units/Patrol Areas screen similar to [Figure 2-34](#), click the {unit} to be edited.

*The sub unit to be edited appears in the **Sub Unit Name** field, similar to the following:*



The image shows a form field for 'Sub Unit Name'. The text 'Waimea' is entered in the input box. To the right of the input box is a checked checkbox labeled 'Active'.

Figure 2-35 Sub Unit Name Field

2. Select or de-select the **Active** checkbox as appropriate, and then click **Update**.

The edited sub unit appears in the sub units list with the update.

NOTE: Sub units cannot be deleted. They can only be made “Inactive.”

2.2.5.4.3 Add a Patrol Area to a Location

A patrol area may be added to either a location or a sub unit from the picklist located on the right of the Sub Units/Patrol Areas screen similar to [Figure 2-34](#). Perform the following steps to add a patrol area:

1. On the right of the Sub Units/Patrol Areas screen, select a {location or sub unit} from the **Location/Sub Unit** picklist, and then click **Add Patrol Area**.
2. Add a new {patrol area name} in the **Patrol Area Name** field.
3. Enter a {patrol area description} in the **Patrol Area Description** field.

NOTE: Be as descriptive as possible for the patrol area’s boundaries.

4. Click **Save**.

*The new patrol area appears in the **Patrol Area** field.*

2.2.5.5 Non-Sufficient Funds (NSF) SAMA Queue

Clicking the **NSF SAMA Queue** tab yields a screen similar to the following:

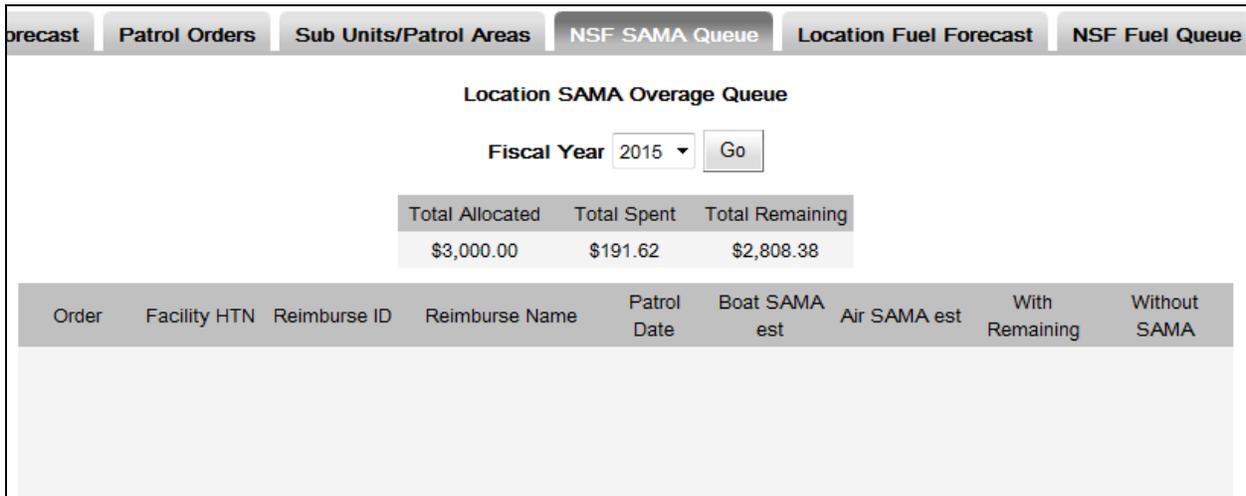


Figure 2-36 NSF SAMA Queue

To view a different fiscal year, select one from the **Fiscal Year** picklist, and then click **Go**.

The appropriate data appears.

2.2.5.6 Location Fuel Forecast

Clicking the **Location Fuel Forecast** tab yields a screen similar to the following:

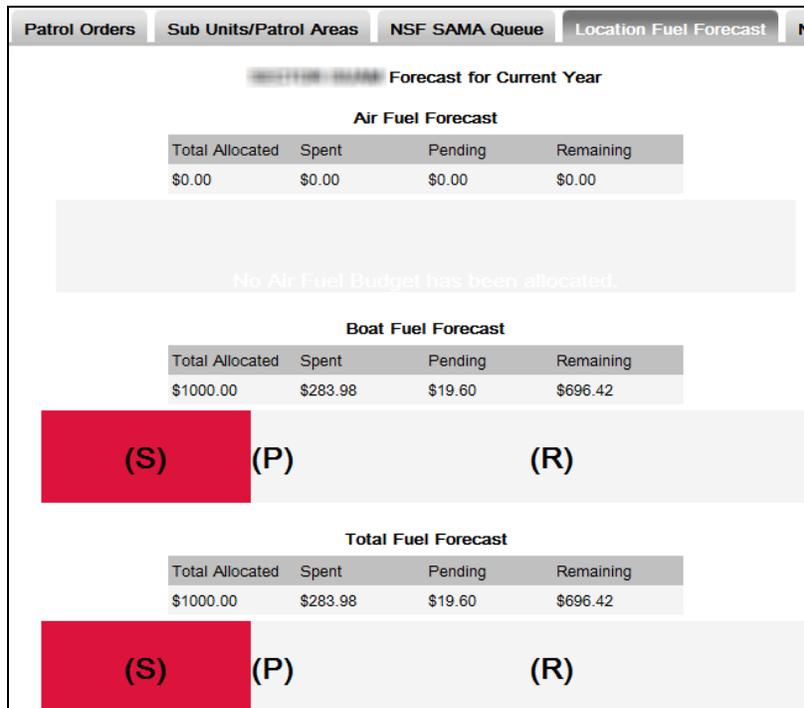


Figure 2-37 Location Fuel Forecast Screen

NOTE: (S) stands for *Spent*, (P) stands for *Pending*, and (R) stands for *Remaining*. Pointing the mouse cursor to each letter in the budget progress bar reveals a short message with budget details, similar to [Figure 2-32](#).

2.2.5.7 NSF Fuel Queue

Clicking the **NSF Fuel Queue** tab yields a screen similar to the following:

The screenshot shows a web interface with a navigation bar at the top containing tabs: Forecast, Patrol Orders, Sub Units/Patrol Areas, NSF SAMA Queue, Location Fuel Forecast, and NSF Fuel Queue. The main content area is titled "Location Fuel Overage Queue". Below the title, there is a "Fiscal Year" dropdown menu set to "2015" and a "Go" button. A summary table displays budget data:

Total Allocated	Total Spent	Total Remaining
\$1,000.00	\$245.73	\$754.27

Below the summary table is a table with the following headers: Order, Facility HTN, Reimburse ID, Reimburse Name, Patrol Date, Boat Fuel est, and Air Fuel est. The table body is currently empty.

Figure 2-38 NSF Fuel Queue

To view a different fiscal year, select one from the **Fiscal Year** picklist, and then click **Go**.

The appropriate data appears.

2.2.6 My Account

The **My Account** button allows the user to change their password and to view their permissions. Clicking the **My Account** button yields a screen similar to the following:

The screenshot shows a web interface with a navigation bar at the top containing tabs: Home, Reports, Search, User Admin, Location Admin, and My Account. The main content area is divided into two sections:

Required Password Criteria

1. Must be at least 8 Characters in length.
2. Must contain at least one number, but can't start with a number.
3. Must contain at least one alphabetical character
4. At least one alpha character must be uppercase and one lowercase.
5. Must contain, but can not start with, one of the following special characters:
_ \$ =
6. **Do not** use the following characters :
() : @ % & * + { } < ? - ! " / ; > * #
7. Password cannot be reused for 90 days or 20 password changes.
8. Must not be the same as username.
9. Must not be too simple.
10. Must change at least 4 of the characters from the previous password.

Example of new password : Exa_m4pl

Current Password:

New Password:

Repeat New Password:

Your permissions at this location

- Request Patrol Orders
- Request Open Orders
- Request Orders For Others
- Upload Receipt Photos
- Complete Others' Orders
- Approve Patrol Requests
- Deny Patrol Requests
- Cancel Patrol Orders
- Submit Orders to FINCEN
- Reactivate Orders
- Search Members
- Search Facilities
- Search Orders
- View Location Reports
- Manage Patrol Areas
- Manage User Permissions
- Create Users/Owners
- Create OIAs

Figure 2-39 My Account Screen

Perform the following steps to change a password:

1. In the **Current Password** field, enter the *{current password}*.
2. In the **New Password** field, enter a *{new password}* that meets the required password criteria listed on the screen.
3. In the **Repeat New Password** field, enter the *{new password}* again.
4. Click **Change Password**.

If the password meets the required criteria, a confirmation appears, similar to the following:

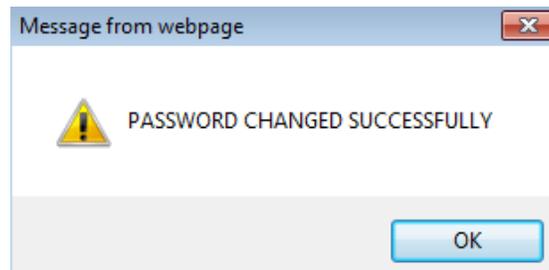


Figure 2-40 Password Change Success Message

5. Click **OK**.

NOTE: *If the new password does not meet the required password criteria when the **Change Password** button is clicked, a message appears with information on what needs to be changed to meet the required criteria. The user can click **OK** and attempt [Steps 1-5](#) again.*

3. Patrol Orders (Owner/Operator and OIA)

This section describes the procedures of the various aspects of patrol orders.

NOTE: *This section covers actions and procedures for all access levels. Not all users have permissions to perform all of the procedures in this section. To easily view permissions, click the **My Account** button in the AOM main menu (discussed in [Section 2.2.6, My Account](#)).*

3.1 Requesting Orders

Perform the following steps to create a new patrol order:

NOTE: *Location cannot be at the district level.*

1. In the AOM main menu, click the **Request Orders** button, as shown in [Figure 2-5](#).

If SAMA levels are adequate, a blank patrol order appears, similar to [Figure 3-2](#).

If SAMA is low or has run out for the location, a message similar to the following appears:

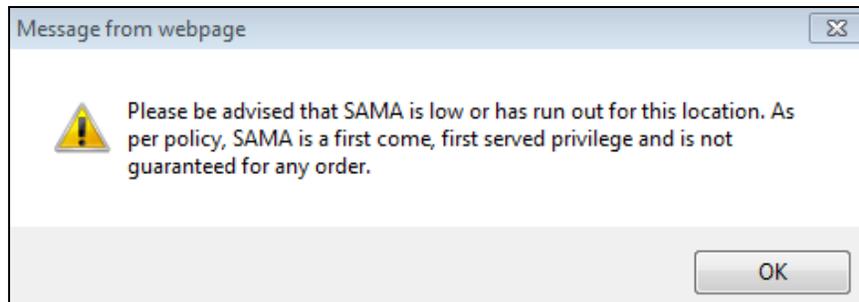


Figure 3-1 SAMA Level Advisory

2. Click **OK** to proceed.

The blank patrol order appears, similar to the following:

Requesting Patrol Orders

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Aux Order Number

Facility: Owner:

Crew Required:

Reimburse:

Date: Sub-Unit: Patrol Type:

Patrol Time: Patrol Area:

Accounting Code

Fuel:

Subsistence:

SAMA - Boat:

SAMA - Air:

Trailing:

Comments:

Owner is Operator
 Owner On Board
 Owner Not On Board

Figure 3-2 Blank Patrol Order

3. Select a {Facility} from the **Facility** picklist.

The patrol order is populated with information about the selected facility, similar to the following:

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Facility: Owner:

Facility Name :

Facility ID:

Call Sign: 123456

Facility Type: G

Inspection Date: 12/14/14

Crew Required: 3

Reimburse:

Owner is Operator
 Owner On Board
 Owner Not On Board

Figure 3-3 Facility Information

4. Select an {Owner} from the **Owner** picklist.

The patrol order is populated with information about the selected owner, similar to the following:

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Facility: <input type="text" value="1234567890123456"/> Facility Name : <input type="text" value="1234567890123456"/> Facility ID: <input type="text" value="1234567890123456"/> Call Sign: 123456 Facility Type: G Inspection Date: 12/14/14 Crew Required: 3	Owner: <input type="text" value="1234567890123456"/> <input type="text" value="1234567890123456"/> 123 OSC KEARNEYSVILLE TESTER KEARNEYSVILLE WV 25430 Reimburse: <input type="text" value="Select from list"/>	<input checked="" type="radio"/> Owner is Operator <input type="radio"/> Owner On Board <input type="radio"/> Owner Not On Board
---	--	--

Figure 3-4 Owner Information

5. Select the *{Owner's status}* from the available options, as shown in the following figure:

Owner is Operator
 Owner On Board
 Owner Not On Board

Figure 3-5 Facility Owner's Status

NOTE: See [Section 3.1.1, Requesting Order When Owner Is Not Operator](#), for further instructions if status is other than Owner is Operator.

6. Click inside the **Date** field.

A calendar appears showing the current date, similar to the following:

Mar 2015						
S	M	T	W	T	F	S
22	23	24	25	26	27	28
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Figure 3-6 Calendar

7. Select the desired *{date}*.

The date appears in its field, and accounting codes automatically appear in their respective fields, similar to the following:

The screenshot shows a form with the following fields:

- Date:** 03/18/15 (highlighted with a red circle)
- Sub-Unit:** [Dropdown menu]
- Patrol Time:** [Dropdown menu]
- Patrol Area:** [Dropdown menu]
- Accounting Code:** A section with four dropdown menus:
 - Fuel:** 2/1 501 101 30 0 9A 73500 2637
 - Subsistence:** 2/K 501 299 11 0 AX 73500 1180
 - SAMA - Boat:** 2/1 501 101 30 0 5C 73500 257P
 - Trailinging:** 2/1 501 101 30 0 5C 73500 257P
 (This entire section is highlighted with a red circle)

Figure 3-7 Date and Accounting Codes

NOTE: The accounting codes are based on the location data and cannot be changed.

8. Select the following information on the patrol order form:
 - At the **Reimburse** picklist, select a {reimbursement option}.
 - At the **Sub-Unit** picklist, select a {sub-unit} (if required).
 - At the **Patrol Type** picklist, select a {patrol type}.
 - At the **Patrol Time** picklist, select a {patrol time}.
 - At the **Patrol Area** picklist, select a {patrol area} (if required).
9. Click **Submit Request** if information is complete and accurate. Otherwise, click **Close (Without Saving)** to clear the form.

A confirmation of the submitted request appears, similar to the following:

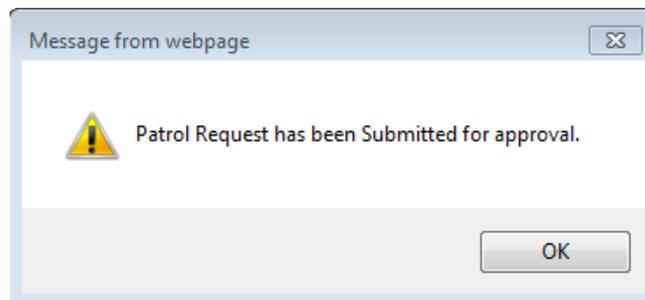


Figure 3-8 Patrol Request Submission Message

10. Click **OK**.

The new request appears blue for the selected date on the calendar, similar to the following:

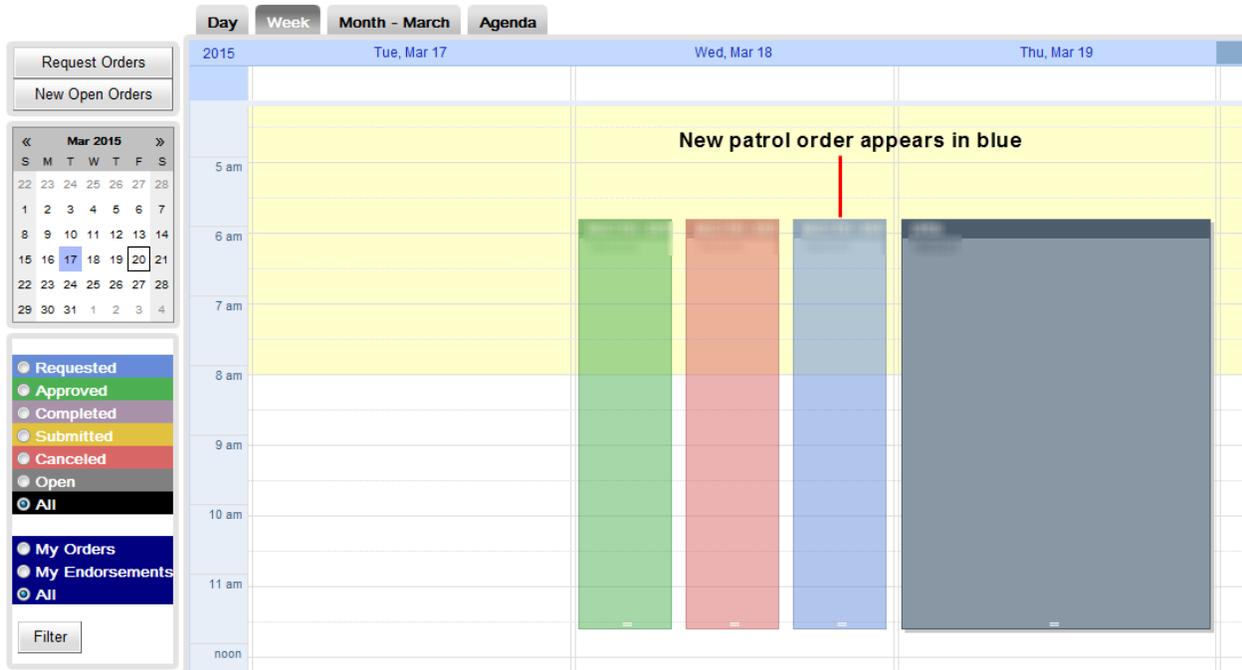


Figure 3-9 Status of Patrol Request for a Specific Date

3.1.1 Requesting Order When Owner Is Not Operator

3.1.1.1 Owner on Board

Complete these steps when the owner is not the operator but is *still* on board:

1. Complete [Steps 1-5](#) in [Section 3.1, Requesting Orders](#).
2. Click the **Owner on Board** radio button to select it.

*The **Select Operator** button appears, similar to the following:*

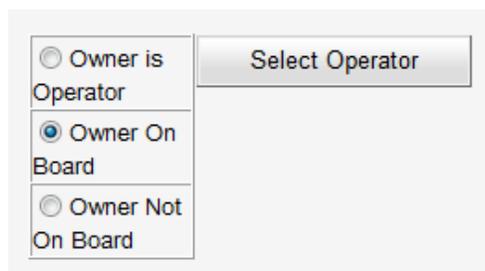


Figure 3-10 Select Operator Button

3. Click the **Select Operator** button.

*The **Select Operator** screen appears, similar to the following:*

Search For : Operators

By: Member ID Name

Search

Member ID	Name	Qualifications

Select Close

Figure 3-11 Select Operator Screen

- To search for operators, select either **Member ID** or Last **Name** as the search criterion, enter the {search information}, and then click **Search**.

NOTE: Wildcards “%” can be placed before, after, and in between search information.

Results appear in the available operators list, similar to the following:

Search For : Operators

By: Member ID Name

Search

Member ID	Name	Qualifications
00000	JOHN J. COLLINS	BCCOX, IT, VE
00000	JOHN J. COLLINS	AV, BCCOX, IT, TCTAUX, QE, VE, WS, TC
00000	JOHN J. COLLINS	AV, BCCOX, IT, PWO
00000	JOHN J. COLLINS	BCCOX

Select Close

Figure 3-12 Available Operators List

NOTE: The operator’s qualifications appear on the right.

- Select the appropriate {operator} from the list, and then click **Select**.

*The selected operator’s information appears below the **Select Operator** button, similar to the following:*

Dept of Homeland Security United States Coast Guard CG-5132		Coast Guard Auxiliary Patrol Order		Aux C
Facility:	<input type="text"/>	Owner:	<input type="text"/>	<input type="radio"/> Owner is Operator <input checked="" type="radio"/> Owner On Board <input type="radio"/> Owner Not On Board
Facility Name :	<input type="text"/>	Facility ID:	<input type="text"/>	<input type="button" value="Select Operator"/>
Call Sign:	123456	Facility Type:	G	
Inspection Date:	12/14/14	Reimburse:	Select from list	
Crew Required:	3			123 OSC KEARNEYSVILLE TESTER KEARNEYSVILLE WV 25430 PROGRAMMER KEARNEYSVILLE WV 25430

Figure 3-13 Selected Operator for Owner on Board

6. Complete [Steps 6-10](#) in [Section 3.1, Requesting Orders](#).

3.1.1.2 Owner Not on Board

Complete these steps when the owner is not the operator and is *not* on board:

1. Complete [Steps 1-5](#) in [Section 3.1, Requesting Orders](#).
2. Click the **Owner Not on Board** radio button to select it.

The Operator picklist appears, similar to the following:

<input type="radio"/> Owner is Operator <input type="radio"/> Owner On Board <input checked="" type="radio"/> Owner Not On Board	Operator: <input type="text"/>
--	---------------------------------------

Figure 3-14 Operator Picklist

3. Select an {operator} from the **Operator** picklist.

The selected operator's information appears below the Operator picklist, similar to the following:

Dept of Homeland Security United States Coast Guard CG-5132		Coast Guard Auxiliary Patrol Order		Aux Order N
Facility:	<input type="text"/>	Owner:	<input type="text"/>	<input type="radio"/> Owner is Operator <input type="radio"/> Owner On Board <input checked="" type="radio"/> Owner Not On Board
Facility Name :	<input type="text"/>	Facility ID:	<input type="text"/>	<input type="text" value="Operator"/>
Call Sign:	123456	Facility Type:	G	
Inspection Date:	12/14/14	Reimburse:	Select from list	
Crew Required:	3			123 OSC KEARNEYSVILLE TECHWRITER KEARNEYSVILLE WV 25430

Figure 3-15 Selected Operator for When Owner Is Not on Board

4. Complete [Steps 6-10](#) in [Section 3.1, Requesting Orders](#).

3.2 Creating New Open Patrol Orders

OIAs can create open orders for patrols. The open orders appear on the calendar, and Owners/Operators can view the open orders and respond if they want to do a particular open patrol ([Section 3.3.6, Claiming or Deleting Open Patrol Order Requests](#), details how to sign up for an open patrol order [claiming]).

Perform the following steps to create a new open patrol order:

1. In the AOM main menu, click the **New Open Orders** button, as shown in [Figure 2-5](#).

If SAMA levels are adequate, an open patrol order request form appears, similar to [Figure 3-16](#).

If SAMA is low or has run out for the location, a message similar to [Figure 3-1](#) appears.

2. If the SAMA level advisory appears, click **OK** to proceed.

A blank open order request appears, similar to the following:

Requesting Open Patrol Order

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Aux Order Number

Date: Sub-Unit: Patrol Type:

Patrol Time: Patrol Area:

Comments:

Figure 3-16 Open Patrol Order Request Form

3. Click inside the **Date** field.

A calendar appears showing the current date, similar to [Figure 3-6](#).

4. Select the desired {date}.
5. Select the following information:
 - At the **Sub-Unit** picklist, select a {sub-unit} (if required).

- At the **Patrol Type** picklist, select a {patrol type}.
 - At the **Patrol Time** picklist, select a {patrol time}.
 - At the **Patrol Area** picklist, select a {patrol area} (if required).
6. Click **Submit Request** if information is complete and accurate. Otherwise, click **Close (Without Saving)** to clear the form.

A confirmation of the submitted request appears, similar to the following:

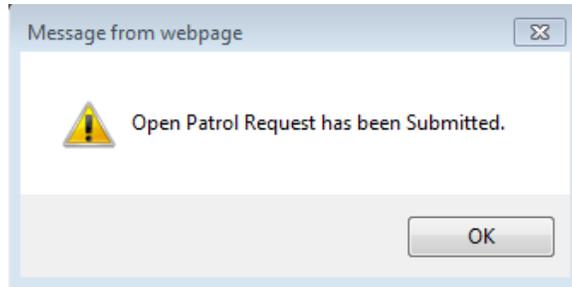


Figure 3-17 Open Patrol Request Submission Message

7. Click **OK**.

The new request appears in gray for the selected date on the calendar, similar to the following:

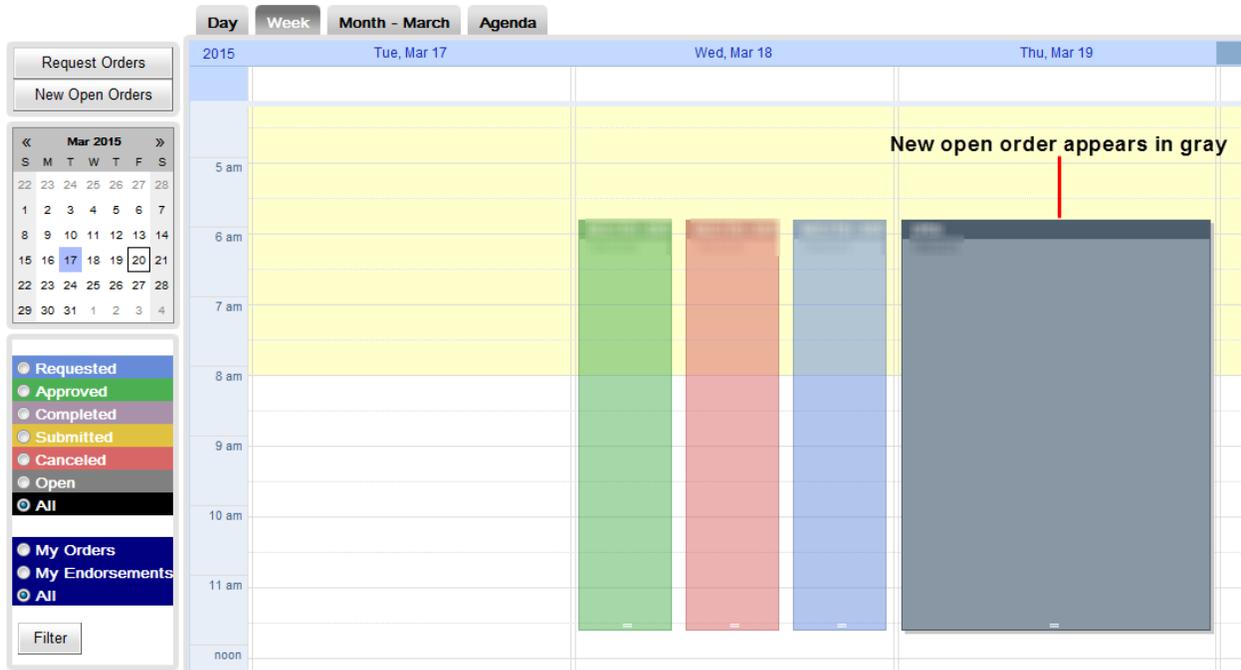


Figure 3-18 Open Order Request on Calendar

3.3 Actions for Requests

OIAs have the authority to approve, deny, and edit requests. Only the creator of the patrol order request has the permission to delete it. The subsections below demonstrate how to perform these actions and more.

3.3.1 Approving a Request

Perform the following steps to approve a patrol order request.

1. Select a {patrol order request coded in blue} on the calendar.

The details of the request are shown, similar to the following:

Requested Patrol Order : [REDACTED]

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Aux Order Number
[REDACTED]

Facility: Facility Name : [REDACTED] Facility ID : [REDACTED] Call Sign : 123456 Facility Type: G Inspection Date: 12/14/14 Crew Required: 3	Owner: [REDACTED] 123 OSC KEARNEYSVILLE TESTER KEARNEYSVILLE WV 25430 Reimburse: NO_REIMBURSEMENT	Operator: [REDACTED] 123 OSC KEARNEYSVILLE TESTER KEARNEYSVILLE WV 25430
---	---	---

Date: 01/23/15 Sub-Unit: TEST LOCATION Patrol Type: 01A: MARITIME OBSERVATION (MOM)

Patrol Time: MIDDAY Patrol Area: [REDACTED]

Accounting Code

Fuel	2/1 501 101 30 0 9A 73500 2637	Comments: [REDACTED]
Subsistence	2/K 501 299 11 0 AX 73500 1180	
SAMA - Boat	2/1 501 101 30 0 5C 73500 257P	
Trailing	2/1 501 101 30 0 5C 73500 257P	

Approve Request Delete Request Deny Request Close (Without Saving) Edit

Figure 3-19 Patrol Order Details

2. Click **Approve Request**.

A confirmation appears, similar to the following:

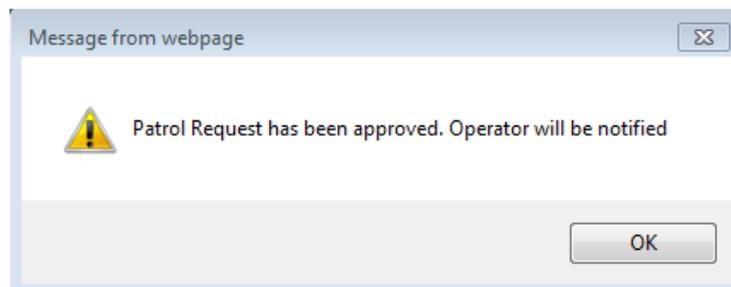


Figure 3-20 Patrol Request Approval Message

3. Click **OK**.

The approved patrol order changes to green on the calendar.

3.3.2 Denying a Request

Perform the following steps to deny a patrol order request.

1. Select a {patrol order request coded in blue} on the calendar.

The details of the request are shown, similar to [Figure 3-19](#).

2. Click **Deny Request**.

A window with a field for explaining why the request is being denied appears, similar to the following:

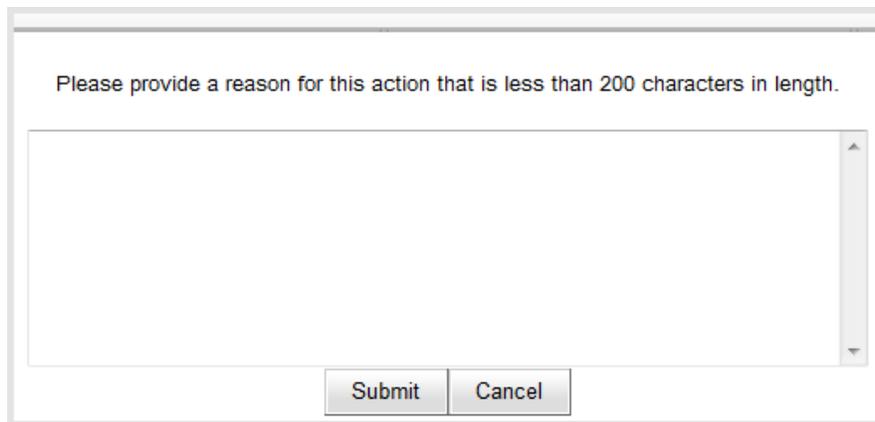
A screenshot of a web application window titled "Reason for Action Window". The window contains a text area with a placeholder message: "Please provide a reason for this action that is less than 200 characters in length." Below the text area are two buttons: "Submit" and "Cancel".

Figure 3-21 Reason for Action Window

3. Enter the {reason}, and then click **Submit**.

A confirmation appears, similar to the following:

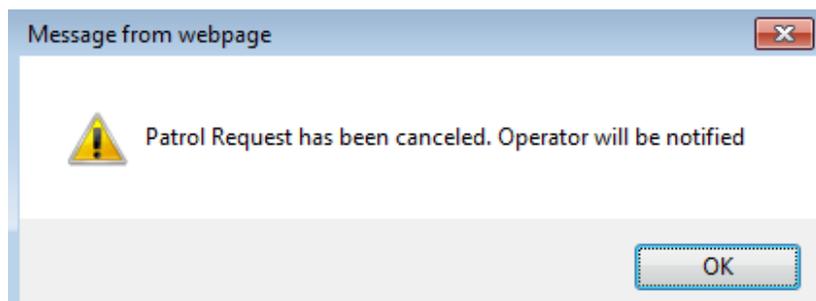


Figure 3-22 Patrol Order Request Cancellation Message

4. Click **OK**.

The denied patrol order request changes to red on the calendar.

3.3.3 Re-Activating a Request

Perform the following steps to re-activate a previously canceled patrol order request.

1. Select a {patrol order request coded in red} on the calendar.

The details of the canceled request are shown, similar to the following:

The screenshot displays the 'Coast Guard Auxiliary Patrol Order' form. At the top, it shows 'Dept of Homeland Security United States Coast Guard CG-5132' and 'Coast Guard Auxiliary Patrol Order'. The 'Aux Order Number' and 'Document ID' are also visible. The form is divided into several sections: 'Facility' (Name, ID, Call Sign, Type, Inspection Date, Crew Required), 'Owner' (Address, Program, Location), and 'Operator' (Address, Name, Location). Below these are 'Date', 'Sub-Unit', 'Patrol Type', 'Patrol Time', and 'Patrol Area'. An 'Accounting Code' section includes dropdowns for Fuel, Subsistence, SAMA - Boat, and Trailing. A table for 'Itinerary' is present, along with 'Facility Data' (Gallons of Fuel, Engine Hours) and 'Automobile Data' (Gallons of Fuel, Mileage). There are also sections for 'Expenses' (Fuel, Fuel Additives, Ice, Other Reimbursable Expenses) and 'Government Provided' (Breakfast, Lunch, Dinner, Mid-Rations). A 'Signature' section includes fields for Claimant, Operator, and OIA. At the bottom, there are buttons for 'Close (Without Saving)' and 'Re-Activate Order', with the latter being circled in red.

Figure 3-23 Canceled Order Screen

2. Click **Re-Activate Order**.

A window with a field for explaining why the request is being re-activated appears, similar to [Figure 3-21](#).

3. Enter the {reason}, and then click **Submit**.

A confirmation appears, similar to the following:

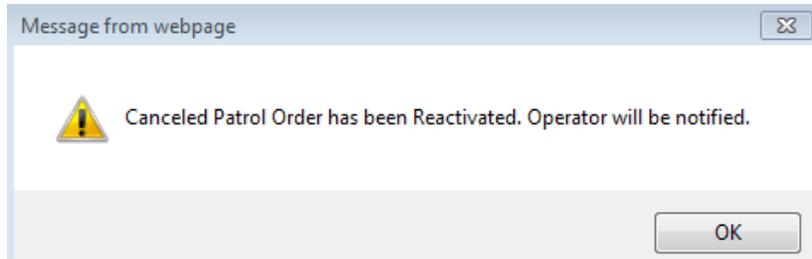


Figure 3-24 Patrol Order Re-Activation Message

4. Click OK.

The re-activated patrol order request changes to green (approved) on the calendar.

3.3.4 Editing a Request

Perform the following steps to edit a patrol order request.

1. Select a {patrol order request coded in blue} on the calendar.

The details of the request are shown, similar to [Figure 3-19](#).

2. Click **Edit**, and then edit the necessary information.

NOTE: *Not all fields can be edited. Facility and Owner/Operator information cannot be changed.*

3. Click **Save** to save the edits, or click **Close (Without Saving)** to make no changes and go back to the calendar.

3.3.5 Deleting a Request

Perform the following steps to delete a request.

NOTE: *Only the creator of the patrol order request has the permission to delete it.*

1. Select a {patrol order request coded in blue} on the calendar.

The details of the request are shown, similar to [Figure 3-19](#).

2. Click **Delete Request**.

A confirmation appears, similar to the following:

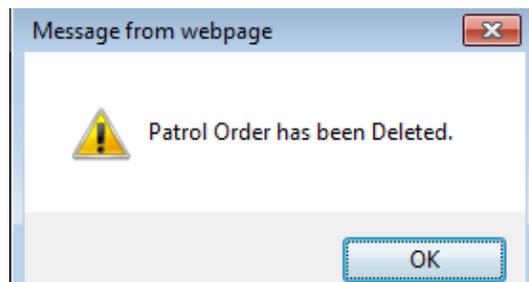


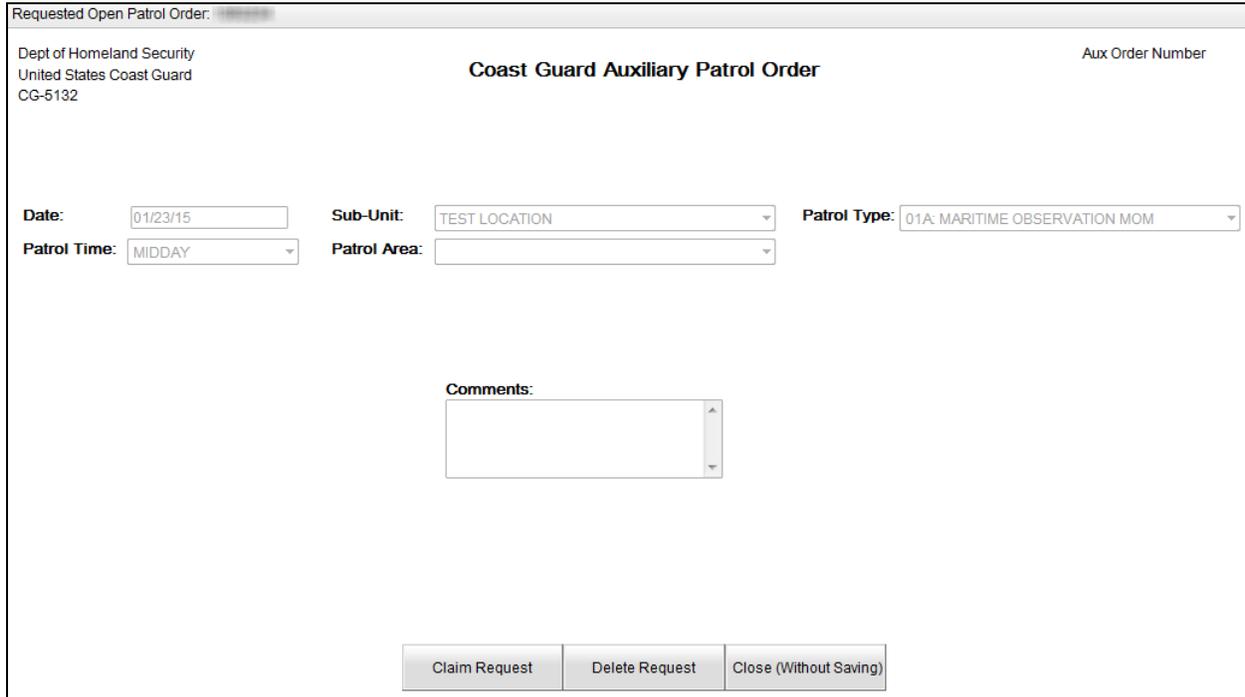
Figure 3-25 Patrol Order Request Deletion Message

3. Click **OK**.

The patrol order request is removed from the calendar.

3.3.6 Claiming or Deleting Open Patrol Order Requests

Open patrol order requests may be claimed or deleted. Selecting an {open patrol order request coded in gray} on the calendar yields a window similar to the following:



Requested Open Patrol Order: [redacted]

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Aux Order Number

Date: 01/23/15 Sub-Unit: TEST LOCATION Patrol Type: 01A: MARITIME OBSERVATION MOM

Patrol Time: MIDDAY Patrol Area:

Comments:

Claim Request Delete Request Close (Without Saving)

Figure 3-26 Requested Open Patrol Order Window

NOTE: To take no action with the order, click **Close (Without Saving)** to return to the calendar.

Perform the following steps to claim an open patrol order request:

1. In the **Requested Open Patrol Order** window similar to [Figure 3-26](#), click **Claim Request**.

The requested patrol order appears, similar to the following:

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Aux Order Number
[REDACTED]

Facility: Owner:

Crew Required:

Owner is Operator
 Owner On Board
 Owner Not On Board

Reimburse:

Date: Sub-Unit: Patrol Type:

Patrol Time: Patrol Area:

Accounting Code

Fuel	<input type="text" value="2/1 501 101 30 0 9A 73500 2637"/>	Comments: <input style="width: 150px; height: 40px;" type="text"/>
Subsistence	<input type="text" value="2/K 501 299 11 0 AX 73500 1180"/>	
SAMA - Boat	<input type="text" value="2/1 501 101 30 0 5C 73500 257P"/>	
SAMA - Air	<input type="text" value="2/1 501 101 30 0 5C 73500 257P"/>	
Trailing	<input type="text" value="2/1 501 101 30 0 5C 73500 257P"/>	

Figure 3-27 Requested Open Patrol Order for Claiming

2. Complete [Steps 3-5](#) in [Section 3.1, Requesting Orders](#).
3. At the **Reimburse** picklist, select a {*reimbursement option*}.
4. At the **Sub-Unit** and the **Patrol Area** picklists, select the {*appropriate options*} (if required).
5. Click **Save** if information is complete and accurate. Otherwise, click **Close (Without Saving)** to clear the form.

A confirmation of the submitted request appears, similar to [Figure 3-8](#).

6. Click **OK**.

The new request appears blue for the selected date on the calendar.

Perform the following steps to delete an open patrol order request.

NOTE: Only the creator of the open patrol order request has the permission to delete it.

1. In the **Requested Open Patrol Order** window similar to [Figure 3-26](#), click **Delete Request**.

A confirmation appears, similar to [Figure 3-25](#).

2. Click **OK**.

The open patrol order request is removed from the calendar.

3.4 Crew Assignments

The following subsections discuss options for adding crew to orders, applying as crew, updating crew assignments, and removing crew from orders.

3.4.1 Options for Adding Crew

Scheduling crew can be done through the patrol order's **Add Crew** button, **Crew History** button, or crew application process (**Apply as Crew** and **Applied Crew**). Those respective buttons appear on the bottom right of the patrol order, similar to the following:

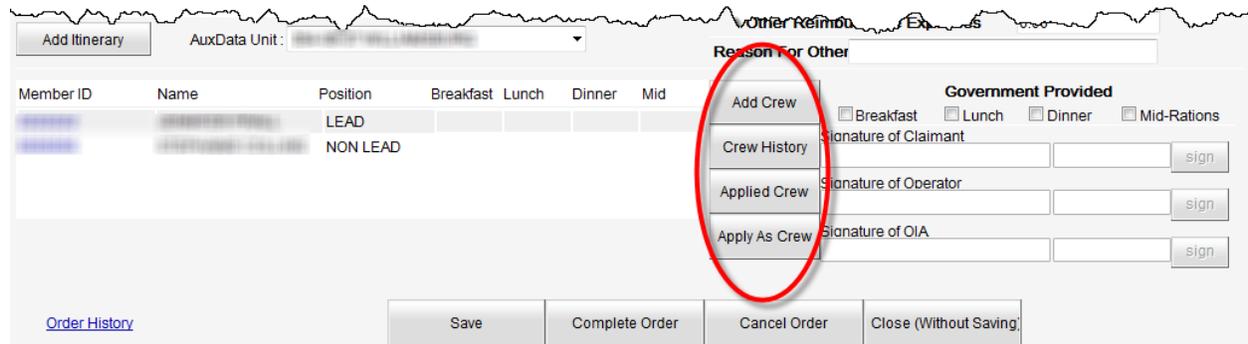


Figure 3-28 Crew Buttons on Patrol Order

3.4.1.1 Adding Crew Through the Add Crew Button

Perform the following steps to add crew through the **Add Crew** button:

1. After selecting the appropriate {approved patrol order coded in green} on the calendar, click the **Add Crew** button on the bottom right of the patrol order, similar to [Figure 3-28](#).

A search window appears, similar to the following:

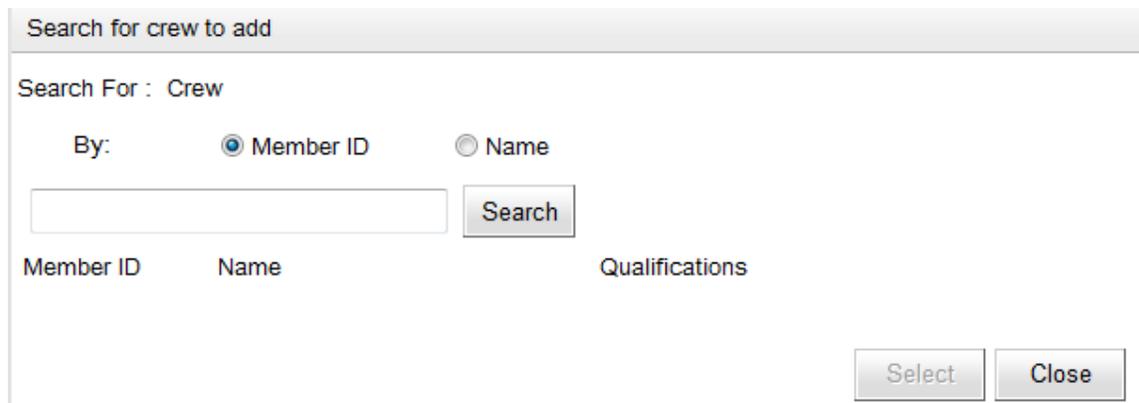


Figure 3-29 Search for Crew Window

2. Select either **Member ID** or Last **Name** as the search criterion, enter the {search information}, and then click **Search**.

NOTE: Wildcards “%” can be placed before, after, and in between search information.

The search results appear, similar to the following:

Search for crew to add

Search For : Crew

By: Member ID Name

Search

Member ID	Name	Qualifications
123456	THOMAS THOMAS	BCCOX

Select Close

Figure 3-30 Crew Search Results

3. Select the appropriate {crew member}, and then click **Select**.

A confirmation appears, similar to the following:

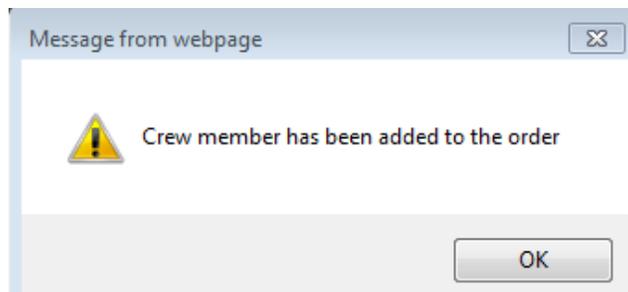


Figure 3-31 Crew Addition Message

4. Click **OK**.
5. Repeat [Steps 1-4](#) until all of the crew is selected.

A crew list appears on the bottom left of the patrol order, similar to the following:

Member ID	Name	Position	Breakfast	Lunch	Dinner	Mid
123456	THOMAS THOMAS	LEAD				
123457	THOMAS THOMAS	NON LEAD				
123458	THOMAS THOMAS	NON LEAD				

Crew list

Order History

Save Complete Order Cancel Order Close (Without Saving)

Add Crew Breakfast Lunch Dinner

Crew History Signature of Claimant

Applied Crew Signature of Operator

Apply As Crew Signature of OIA

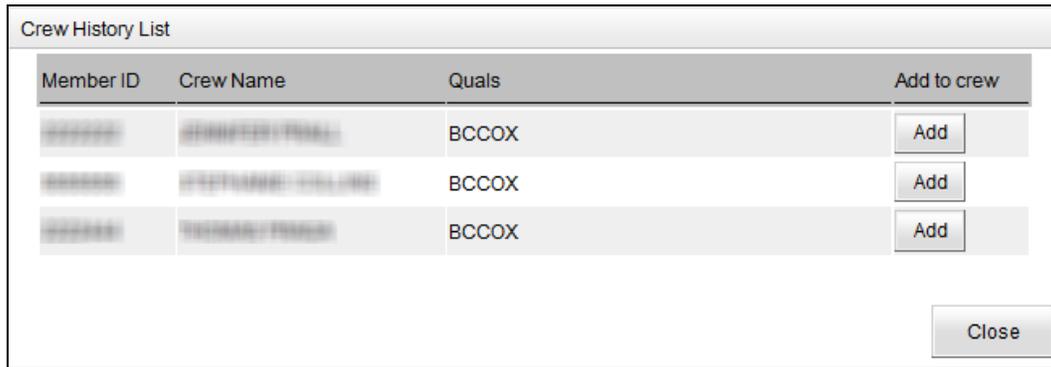
Figure 3-32 Crew List on Patrol Order

3.4.1.2 Adding Crew Through the Crew History Button

Perform the following steps to add crew through the **Crew History** button:

1. After selecting the appropriate *{approved patrol order coded in green}* on the calendar, click the **Crew History** button on the bottom right of the patrol order, similar to [Figure 3-28](#).

The Crew History list appears, similar to the following:



Member ID	Crew Name	Quals	Add to crew
000000	00000000000000000000	BCCOX	Add
000000	00000000000000000000	BCCOX	Add
000000	00000000000000000000	BCCOX	Add

Figure 3-33 Crew History List

2. For each crew member to be scheduled, click **Add** in their respective row.

A confirmation appears, similar to [Figure 3-31](#).

3. Click **OK**.

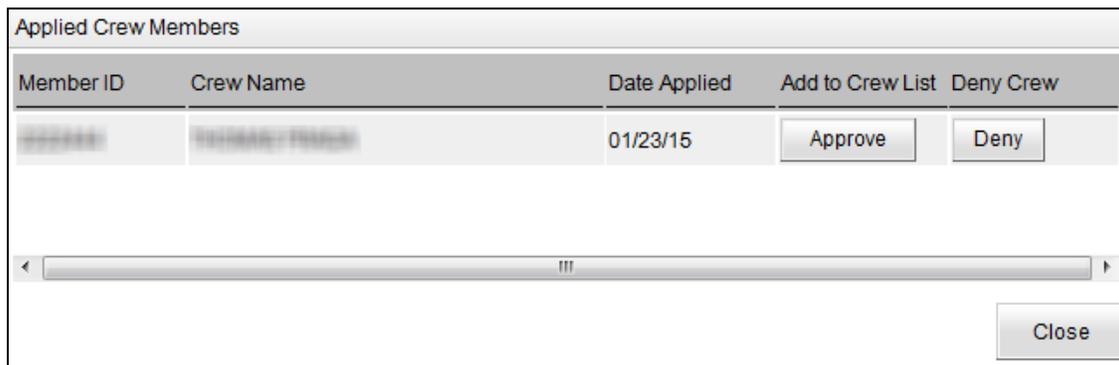
The crew member is added to the patrol order crew list, similar to [Figure 3-32](#).

3.4.1.3 Using the Applied Crew Button

Users can apply as crew for an order ([Section 3.4.2, Applying as Crew](#), shows how to apply). Their information can be viewed through the **Applied Crew** button, the name of which is coded red if an application is pending.

After selecting the appropriate *{approved patrol order coded in green}* on the calendar, click the **Applied Crew** button on the bottom right of the patrol order, similar to [Figure 3-28](#).

The Applied Crew Members window appears, similar to the following:



Member ID	Crew Name	Date Applied	Add to Crew List	Deny Crew
000000	00000000000000000000	01/23/15	Approve	Deny

Figure 3-34 Applied Crew Members Window

Perform the following steps to approve a crew application:

1. In the **Applied Crew Members** window, click **Approve** in the appropriate applicant's row.

A crew member update window appears, similar to the following:

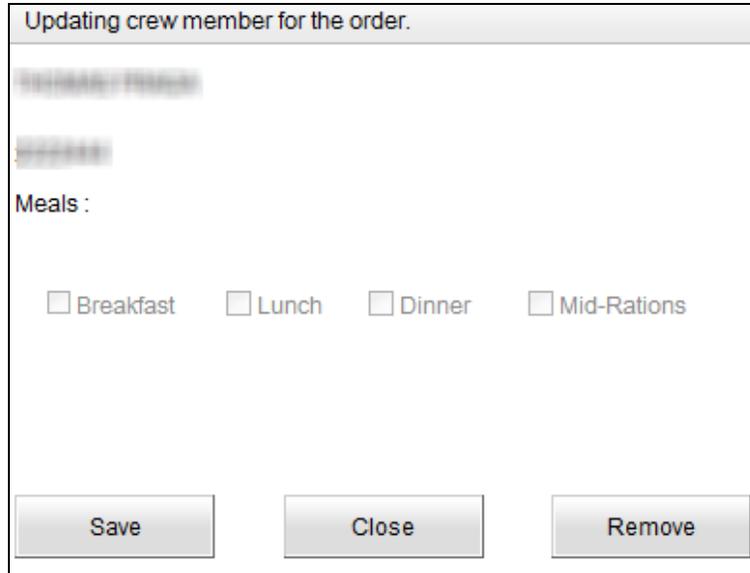


Figure 3-35 Crew Member Update Window

2. Update the member's information as appropriate, and then click **Save**.

A confirmation appears, similar to the following:

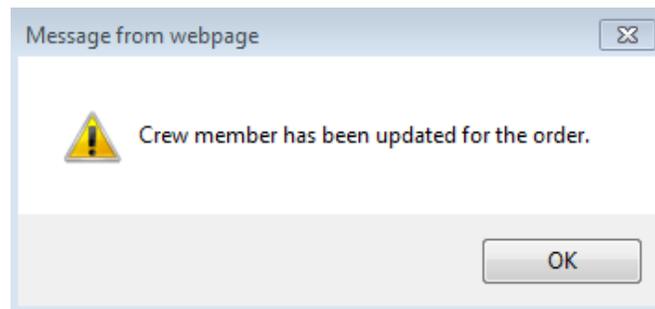


Figure 3-36 Crew Member Updated Message

3. Click **OK**.

The crew member is added to the patrol order crew list.

Perform the following steps to deny a crew application:

1. In the **Applied Crew Members** window, click **Deny** in the appropriate applicant's row.

A confirmation appears, similar to the following:

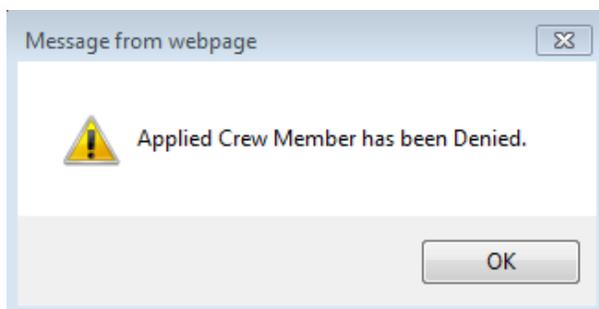


Figure 3-37 Applied Crew Member Denied Message

2. Click **OK**.

3.4.2 Applying as Crew

Perform the following steps to apply as crew for an order:

1. After selecting the appropriate *{patrol order}* on the calendar, click the **Apply as Crew** button on the bottom right of the patrol order, similar to [Figure 3-28](#).

A confirmation appears, similar to the following:

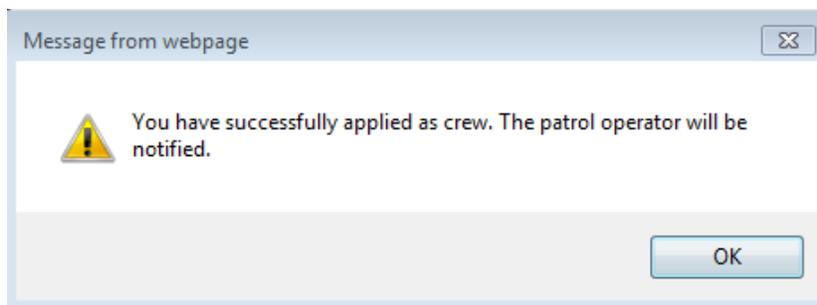


Figure 3-38 Applied as Crew Success Message

2. Click **OK**.

*The applicant appears in the **Applied Crew Members** window, similar to [Figure 3-34](#).*

3.4.3 Updating Crew Information

Perform the following steps to update a crew member's information:

1. After selecting the appropriate *{patrol order}* on the calendar, select a member in the crew list on the bottom left of the patrol order, similar to [Figure 3-32](#).

A crew member update window appears, similar to [Figure 3-35](#).

2. Update the member's information as appropriate, and then click **Save**.

A confirmation appears, similar to [Figure 3-36](#).

3. Click **OK**.

3.4.4 Removing a Crew Member From an Order

Perform the following steps to remove a crew member from an order:

1. After selecting the appropriate *{patrol order}* on the calendar, select a member in the crew list on the bottom left of the patrol order, similar to [Figure 3-32](#).

A crew member update window appears, similar to [Figure 3-35](#).

2. Click **Remove**.

A confirmation appears, similar to the following:

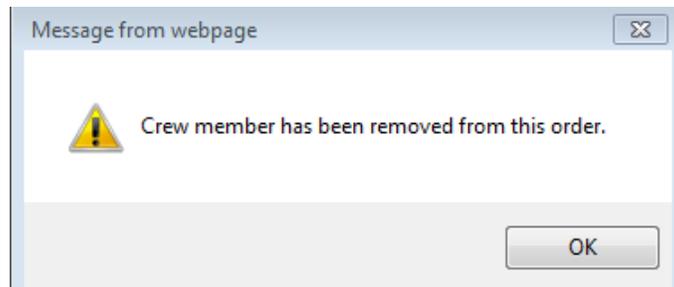


Figure 3-39 Crew Member Removal Message

3. Click **OK**.

3.4.5 Overriding the Crew Requirement

The number of crew required for a facility is indicated on the order when it is created. If the crew requirement cannot be met for a particular order, users with the crew-override permission can override the crew requirement ([Section 2.2.4.3, User Admin Permissions](#), details how administrators can configure permissions; users can contact their administrator to request crew-override permission, if necessary).

Users with the appropriate permission can perform the following steps to override the crew requirement:

1. After selecting the appropriate *{approved patrol order coded in green}* on the calendar, click the **Override Crew** button that appears for users with the crew-override permission:

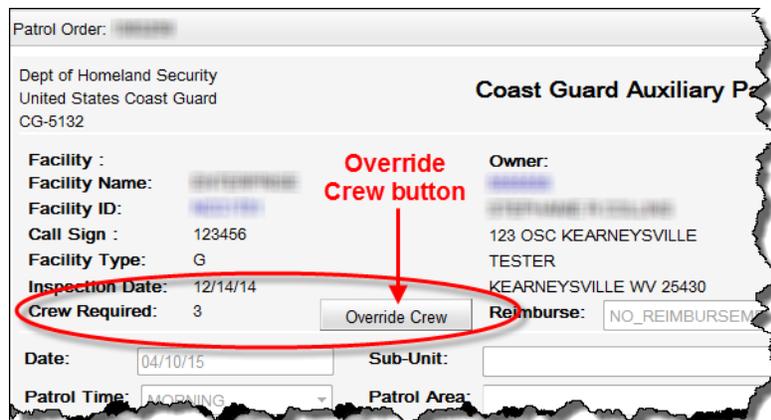
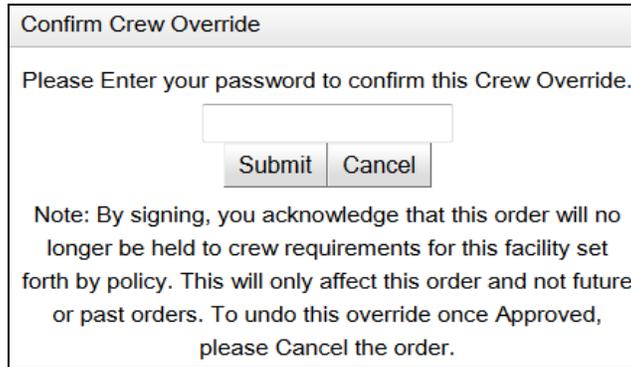


Figure 3-40 Override Crew Button on Patrol Order

The **Confirm Crew Override** dialog box appears, similar to the following:



Confirm Crew Override

Please Enter your password to confirm this Crew Override.

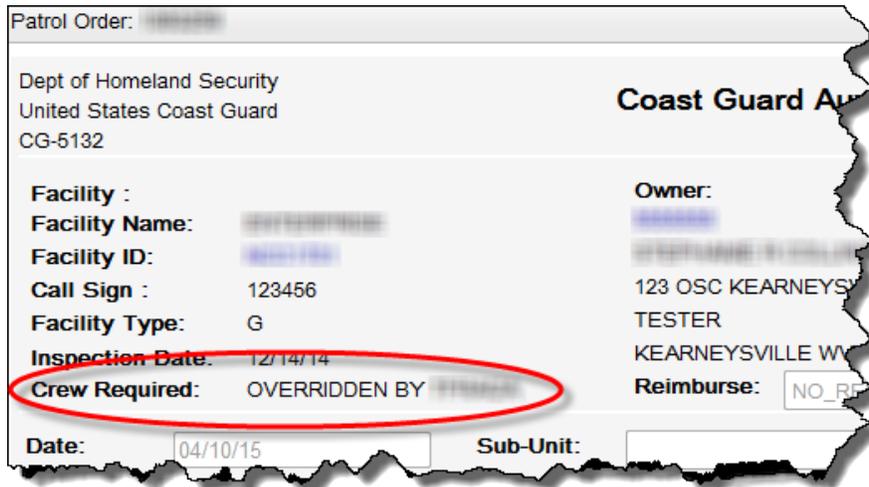
Submit Cancel

Note: By signing, you acknowledge that this order will no longer be held to crew requirements for this facility set forth by policy. This will only affect this order and not future or past orders. To undo this override once Approved, please Cancel the order.

Figure 3-41 Crew Override Confirmation

2. To confirm the crew override, enter the {password}, and then click **Submit**.

The information for the crew requirement changes to “**OVERRIDDEN BY** {USERNAME}”, similar to the following:



Patrol Order: [REDACTED]

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Au

Facility :		Owner:	
Facility Name:	[REDACTED]		[REDACTED]
Facility ID:	[REDACTED]		[REDACTED]
Call Sign :	123456		123 OSC KEARNEYS
Facility Type:	G		TESTER
Inspection Date:	12/14/14		KEARNEYSVILLE W
Crew Required:	OVERRIDDEN BY [REDACTED]	Reimburse:	NO_RF

Date: 04/10/15 **Sub-Unit:**

Figure 3-42 Crew Requirement Overridden

3.5 Completing a Patrol Order

This section provides instructions for completing a patrol order.

NOTE: Before completing a patrol order, take pictures of the receipt(s), and then save the receipts on the computer in one of the following file formats: **.jpg**, **.png**, or **.gif**. Pictures should be less than 250 kilobytes (KB). The resolution should be as close to 600 X 600 as possible.

To complete a patrol order, first select the appropriate {approved patrol order coded in green} on the calendar.

The patrol order appears similar to the following:

Patrol Order: XXXXXXXXXX

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Aux Order Number : XXXXXXXXXX
Document ID :

Facility : Facility Name: XXXXXXXXXX Facility ID: XXXXXXXXXX Call Sign : 123456 Facility Type: G Inspection Date: 12/14/14 Crew Required: 3	Owner: XXXXXXXXXX 123 OSC KEARNEYSVILLE TESTER KEARNEYSVILLE WV 25430 Reimburse: NO_REIMBURSEMENT	Operator: XXXXXXXXXX XXXXXXXXXX 123 OSC KEARNEYSVILLE PROGRAMMER KEARNEYSVILLE WV 25430
--	---	---

Date: 03/18/15	Sub-Unit: 	Patrol Type: 01A: MARITIME OBSERVATION MOM
Patrol Time: MORNING	Patrol Area: 	

Accounting Code

Fuel	2/1 501 101 30 0 9A 73500 2637	
Subsistence	2/K 501 299 11 0 AX 73500 1180	
SAMA - Boat	2/1 501 101 30 0 5C 73500 257P	
Trailing	2/1 501 101 30 0 5C 73500 257P	

Comments:

<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Itinerary</th> <th>Start Date</th> <th>Start Time</th> <th>End Date</th> <th>End Time</th> <th>Location</th> <th>Mission</th> </tr> </thead> <tbody> <tr> <td> </td> </tr> </tbody> </table> <p style="margin-top: 5px;">Add Itinerary AuxData Unit: XXXXXXXXXX</p>	Itinerary	Start Date	Start Time	End Date	End Time	Location	Mission								<table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Facility Data</td> <td style="width: 50%;">Automobile Data</td> </tr> <tr> <td>Gallons of Fuel : 0</td> <td>Gallons of Fuel : 0</td> </tr> <tr> <td>Engine Hours : 0</td> <td>Mileage : 0</td> </tr> </table> <table border="0" style="width: 100%; margin-top: 5px;"> <tr> <th style="width: 40%;">Expenses</th> <th style="width: 20%;">Government Provided</th> <th style="width: 20%;">Total (\$)</th> <th style="width: 20%;"></th> </tr> <tr> <td>Fuel</td> <td><input type="checkbox"/></td> <td>0.00</td> <td></td> </tr> <tr> <td>Fuel Additives</td> <td><input type="checkbox"/></td> <td>0.00</td> <td>Receipts</td> </tr> <tr> <td>Ice</td> <td><input type="checkbox"/></td> <td>0.00</td> <td>Total: 0</td> </tr> <tr> <td>Other Reimbursable Expenses</td> <td></td> <td>0.00</td> <td></td> </tr> </table> <p style="margin-top: 5px;">Reason For Other: </p>	Facility Data	Automobile Data	Gallons of Fuel : 0	Gallons of Fuel : 0	Engine Hours : 0	Mileage : 0	Expenses	Government Provided	Total (\$)		Fuel	<input type="checkbox"/>	0.00		Fuel Additives	<input type="checkbox"/>	0.00	Receipts	Ice	<input type="checkbox"/>	0.00	Total: 0	Other Reimbursable Expenses		0.00	
Itinerary	Start Date	Start Time	End Date	End Time	Location	Mission																																			
Facility Data	Automobile Data																																								
Gallons of Fuel : 0	Gallons of Fuel : 0																																								
Engine Hours : 0	Mileage : 0																																								
Expenses	Government Provided	Total (\$)																																							
Fuel	<input type="checkbox"/>	0.00																																							
Fuel Additives	<input type="checkbox"/>	0.00	Receipts																																						
Ice	<input type="checkbox"/>	0.00	Total: 0																																						
Other Reimbursable Expenses		0.00																																							

<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Member ID</th> <th>Name</th> <th>Position</th> <th>Breakfast</th> <th>Lunch</th> <th>Dinner</th> <th>Mid</th> </tr> </thead> <tbody> <tr> <td>XXXXXXXXXX</td> <td>XXXXXXXXXX</td> <td>LEAD</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>XXXXXXXXXX</td> <td>XXXXXXXXXX</td> <td>NON LEAD</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Member ID	Name	Position	Breakfast	Lunch	Dinner	Mid	XXXXXXXXXX	XXXXXXXXXX	LEAD					XXXXXXXXXX	XXXXXXXXXX	NON LEAD					<table border="0" style="width: 100%;"> <tr> <td style="width: 20%;">Government Provided</td> <td><input type="checkbox"/> Breakfast</td> <td><input type="checkbox"/> Lunch</td> <td><input type="checkbox"/> Dinner</td> <td><input type="checkbox"/> Mid-Rations</td> </tr> <tr> <td>Add Crew</td> <td colspan="4">Signature of Claimant sign</td> </tr> <tr> <td>Crew History</td> <td colspan="4">Signature of Operator sign</td> </tr> <tr> <td>Applied Crew</td> <td colspan="4">Signature of OIA sign</td> </tr> </table>	Government Provided	<input type="checkbox"/> Breakfast	<input type="checkbox"/> Lunch	<input type="checkbox"/> Dinner	<input type="checkbox"/> Mid-Rations	Add Crew	Signature of Claimant sign				Crew History	Signature of Operator sign				Applied Crew	Signature of OIA sign			
Member ID	Name	Position	Breakfast	Lunch	Dinner	Mid																																				
XXXXXXXXXX	XXXXXXXXXX	LEAD																																								
XXXXXXXXXX	XXXXXXXXXX	NON LEAD																																								
Government Provided	<input type="checkbox"/> Breakfast	<input type="checkbox"/> Lunch	<input type="checkbox"/> Dinner	<input type="checkbox"/> Mid-Rations																																						
Add Crew	Signature of Claimant sign																																									
Crew History	Signature of Operator sign																																									
Applied Crew	Signature of OIA sign																																									

[Order History](#)

Save	Complete Order	Cancel Order	Close (Without Saving)
---	---	---	---

Figure 3-43 Patrol Order to Be Completed After Mission

NOTE: Clicking the *Save* button saves the user's work and allows them to come back to it later without losing their work. Clicking *Close (Without Saving)* erases any work the user has done since the last save. Clicking *Cancel Order* yields a window similar to [Figure 3-21](#). The instructions for canceling an order are similar to [Steps 3-4](#) in [Section 3.3.2, Denying a Request](#).

The following subsections discuss the various aspects of completing a patrol order.

3.5.1 Comments

The **Comments** field should include information such as the following (if applicable):

NOTE: This list is not all-inclusive.

- Information required or used by the OIA
- Non-member guests

- Active duty members on board who do not appear in the crew list
- A Qualifying Examiner's/Flight Examiner's name
- Any amplifying info about the mission
- Crew additions or deletions during the patrol
- Who was involved with trailering

3.5.2 Facility and Automobile Data

Enter information within the **Facility Data** and/or **Automobile Data** sections on the right of the patrol order.

NOTE: It is not necessary to enter gallons of fuel for automobile data; mileage is the only automobile data required.

3.5.3 Expenses

If the government provided fuel, fuel additives, and/or ice, click the appropriate checkbox(es) in the **Expenses** section on the right of the patrol order.

If the government did not provide fuel, fuel additives, and/or ice, enter the *{total dollar amounts}* in the **Fuel, Fuel Additives, Ice,** and/or **Other Reimbursable Expenses** fields.

*NOTE: If other reimbursable expenses are claimed, enter a {reason} in the **Reason for Other** field.*

If the government provided breakfast, lunch, dinner, and/or mid-rations, click the appropriate checkbox(es) above the **Signature** fields on the bottom right of the patrol order.

3.5.3.1 Uploading Receipts

1. On the right of the patrol order, click **Receipts**.

*The **Receipts for Order** window appears, similar to the following:*

Receipts For order

AuxOrder number :

Receipt Photos

1. Must be submitted for purchases of \$75 or more.
2. Must be in .JPG, .PNG, or .GIF format.
3. Must be under 250kb in size.
4. Chose photos to delete (or keep) from the view screen.
5. Close this window to delete receipts in the Receipts to Delete table.

Receipts to Submit

File Name	Uploaded By	Date Uploaded
0 Results		

Receipts to Delete

File Name	Uploaded By	Date Uploaded
0 Results		

Figure 3-44 Receipts for Order Window

2. Click **Browse**, and then select the *{receipt}* from the folder where it was saved.
3. With the *{location}* for the *{receipt}* appearing in the **Browse** field, click the **Upload Selected Receipt** button.

A confirmation appears, similar to the following:

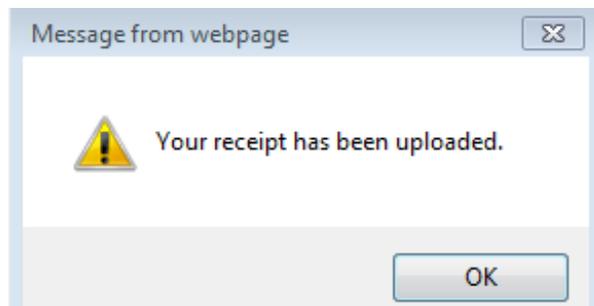


Figure 3-45 Receipt Has Been Uploaded Message

4. Click **OK**.

The file name of the uploaded receipt appears in the **Receipts to Submit** field, similar to the following.

Receipts For order

AuxOrder number :

Receipt Photos

1. Must be submitted for purchases of \$75 or more.
2. Must be in .JPG, .PNG, or .GIF format.
3. Must be under 250kb in size.
4. Chose photos to delete (or keep) from the view screen.
5. Close this window to delete receipts in the Receipts to Delete table.

Receipts to Submit

File Name	Uploaded By	Date Uploaded
Receipt.png	77777777	01/23/15 08:02:13

Receipts to Delete

File Name	Uploaded By	Date Uploaded
-----------	-------------	---------------

Figure 3-46 Receipts to Submit

5. Repeat [Steps 2-4](#) until all appropriate receipts have been uploaded.
6. Click **Close Receipt Window**.

NOTE: The total number of receipts appears under the patrol order **Receipts** button, similar to the following:

Expenses	Government Provided	Total (\$)
Fuel	<input type="checkbox"/>	0.00
Fuel Additives	<input type="checkbox"/>	0.00
Ice	<input type="checkbox"/>	0.00
Other Reimbursable Expenses		0.00
Reason For Other	<input type="text"/>	

Total:

Figure 3-47 Receipt Count on Patrol Order

3.5.3.2 Deleting Receipts

1. On the right of the patrol order, click **Receipts**.

*The **Receipts for Order** window appears with previously uploaded receipts in the **Receipts to Submit** field, similar to [Figure 3-46](#).*

2. Click the {file name of the receipt to be deleted}.

*A window displaying the receipt appears with the option to **Delete Receipt**, similar to the following:*

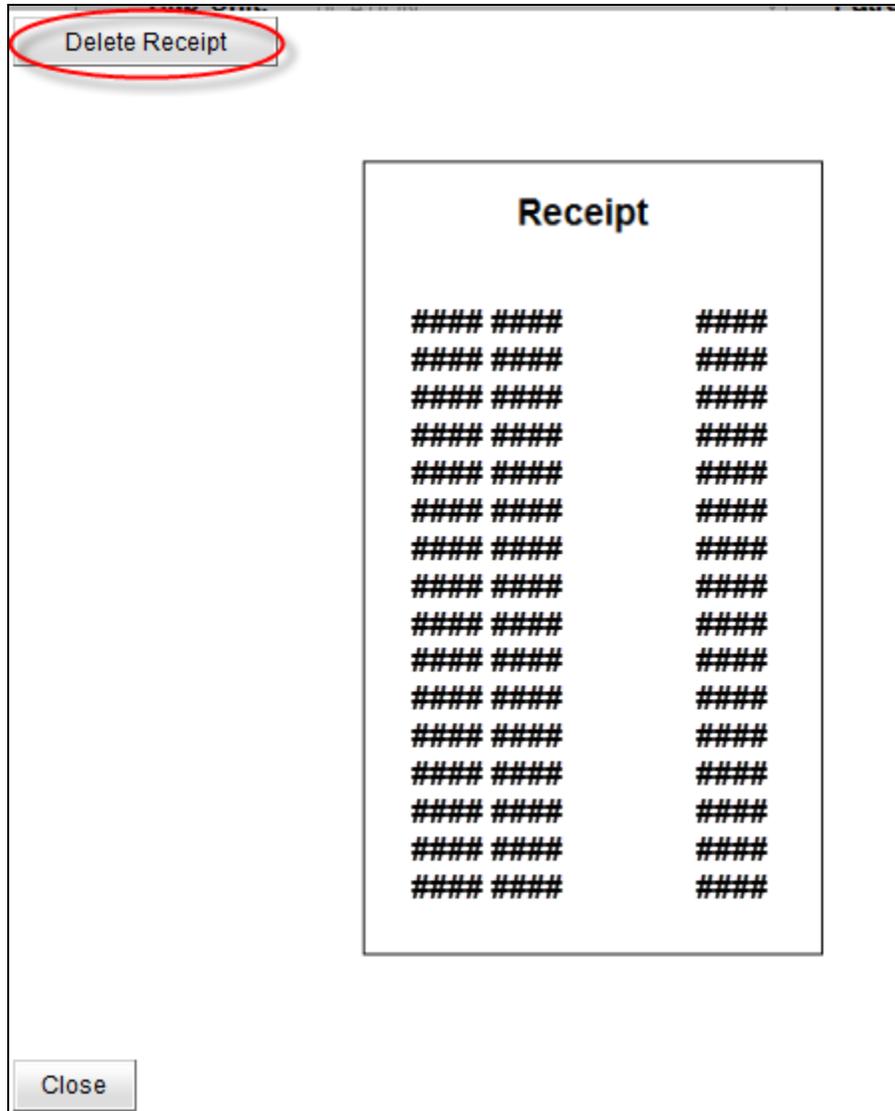


Figure 3-48 Receipt Window With Option to Delete

3. Click **Delete Receipt**. Otherwise, click **Close** to keep the receipt.

*Clicking **Delete Receipt** moves the receipt to the **Receipts to Delete** field in the **Receipts for Order** window, similar to the following:*

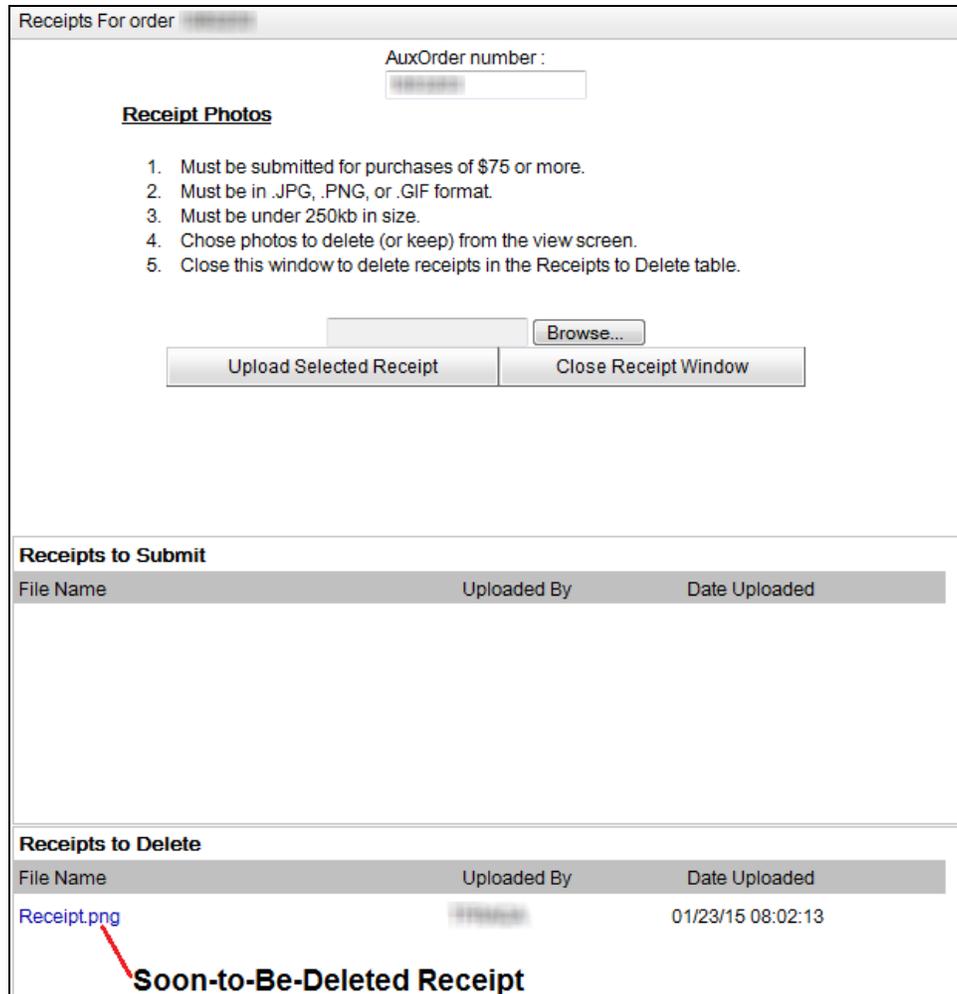


Figure 3-49 Receipts to Delete

4. Repeat [Steps 2-3](#) until all appropriate receipts have been listed for deletion.
5. Click **Close Receipt Window**.

A message similar to the following appears:

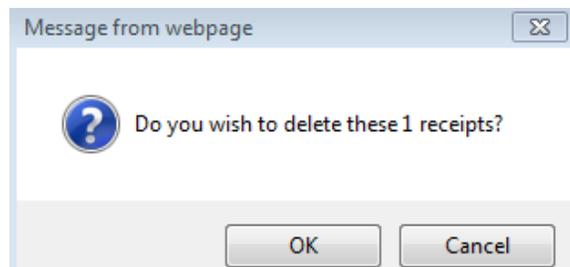


Figure 3-50 Receipt Deletion Confirmation

6. Click **OK**. Otherwise, click **Cancel**.

*Clicking **OK** removes the receipt from the order.*

3.5.3.3 Restoring Receipts Listed for Deletion

While a receipt is still listed for deletion in the **Receipts for Order** window (see [Figure 3-49](#)), it can be restored in the event that a user mistakenly listed it for deletion. Perform the following steps to move a receipt from the **Receipts to Delete** field to the **Receipts to Submit** field:

1. In the **Receipts to Delete** field, click the *{file name of the receipt to restore}*.

*A window displaying the receipt with the option to **Undo Delete** appears, similar to the following:*

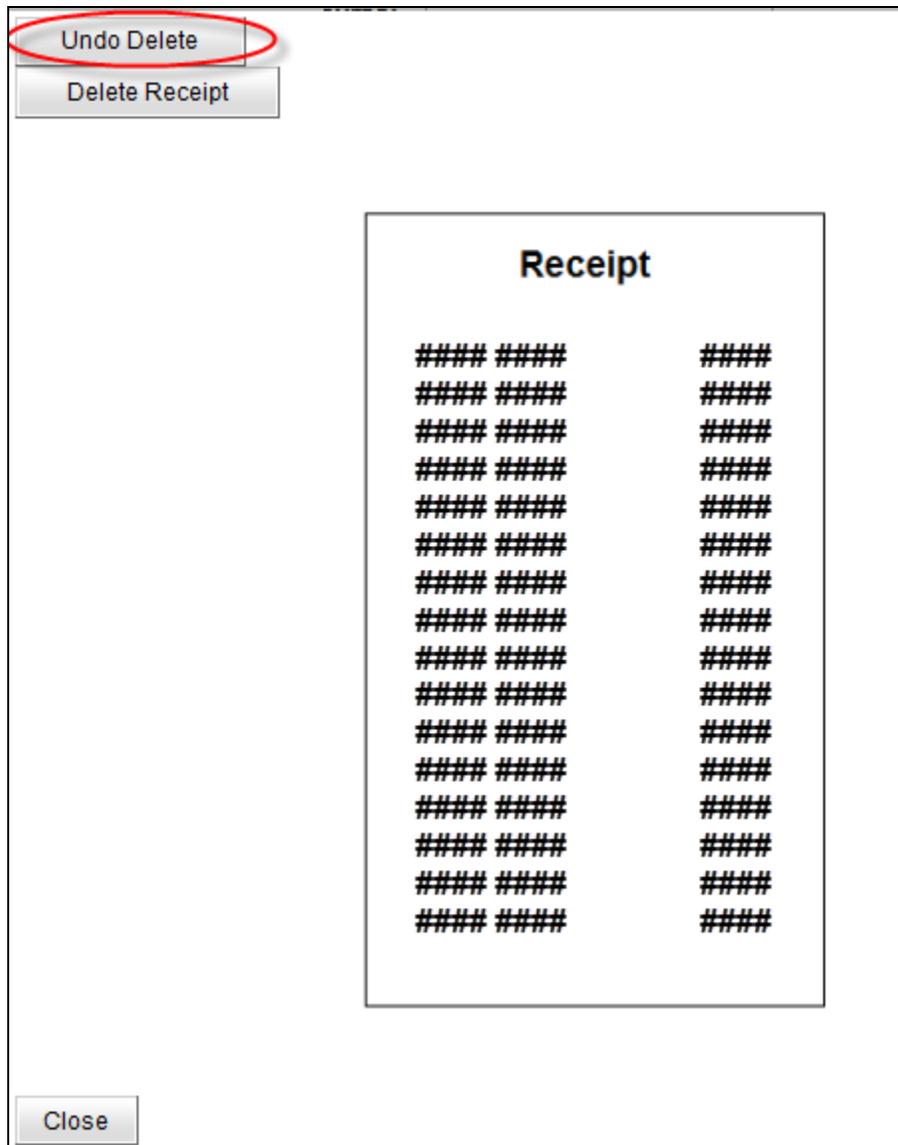


Figure 3-51 Receipt Window With Option to Undo Delete

2. Click the **Undo Delete** button.

*The receipt now appears in the **Receipts to Submit** field, similar to [Figure 3-46](#).*

3.5.4 Itineraries

Perform the following steps to add an itinerary:

NOTE: Complete as many itineraries as needed to accurately report all aspects of the patrol.

1. On the left of the patrol order, click the **Add Itinerary** button.

A blank itinerary appears, similar to the following:

Add itinerary/mission for this order

Itinerary **Mission Code** **OPCON**

Start Date Start Time (Use 24hr) End Date End Time (Use 24hr)

01/16/15 H: M: 01/16/15 H: M:

Mission Details

Location **Assists** **Waters**

SAR Details

Lives Saved **Persons Assisted** **Property Value** **Case Number**

Add **Close**

Figure 3-52 Blank Itinerary

2. Enter the following information, and then click **Add**:

- Select the {itinerary type} from the **Itinerary** picklist.
- Select the {mission code} from the **Mission Code** picklist.
- Select the {OPCON area} from the **OPCON** picklist.
- In the **Start Time** fields, enter a {start time} in hours (H) and minutes (M).

NOTE 1: For {start time hour}, use 24-hour format, entering the hour as two digits (for example, 05, 13, 20, and so forth).

- In the **End Time** fields, enter an {end time} in hours (H) and minutes (M).

NOTE 2: For {end time hour}, use 24-hour format, entering the hour as two digits (for example, 05, 13, 20, and so forth).

NOTE 3: The **Assists** and the **SAR Details** fields may or may not be editable, depending on the mission type.

- Within **Mission Details**, enter a {location}, enter {assists data}, and select {waters} from the **Waters** picklist.

- Within **Search and Rescue (SAR) Details**, enter {lives saved data}, {persons assisted data}, {property value data}, and a {case number}.

NOTE 4: If the mission was SAR (mission code SAR 24), the number of assists is locked by AOM at one and cannot be changed. If there was another SAR assist during the patrol, enter another itinerary line with mission code SAR 24 and the appropriate times to capture the second case's information. Each SAR case requires a separate itinerary line.

NOTE 5: In the crew member update window ([Figure 3-35](#)), the possible available meals are activated based on the time of mission entered in the itinerary, but the Owner/Operator must manually click the checkbox for the appropriate meals provided for each member in each itinerary entry. Select {crew member(s)} in the crew list if updates are necessary (see [Section 3.4.3, Updating Crew Information](#)).

3.5.5 AuxData Unit

At the **AuxData Unit** picklist, select the appropriate {unit}.

3.5.6 Saving Before Obtaining Signatures

1. After completing all of the appropriate fields in the patrol order except the **Signature** fields, click **Save** at the bottom of the screen to save the work.

A confirmation appears, similar to the following:

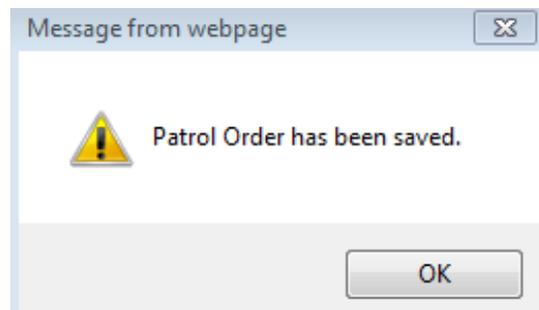


Figure 3-53 Patrol Order Saved

2. Click **OK**.

The completed patrol order is saved and remains open on the screen.

3. To return to the calendar, after the patrol order has been saved, click **Close (Without Saving)**.

CAUTION: Be sure to save the patrol order with the Save button before using the Close (Without Saving) button to return to the calendar; otherwise, any information entered since the last save will be lost and have to be re-entered.

3.5.7 Obtaining Signatures to Complete and Submit Orders

With all of the appropriate fields in the patrol order completed except the **Signature** fields, the order is now ready for the Owner/Operator to sign as Claimant and/or Operator in the **Signature** fields, similar to the following:

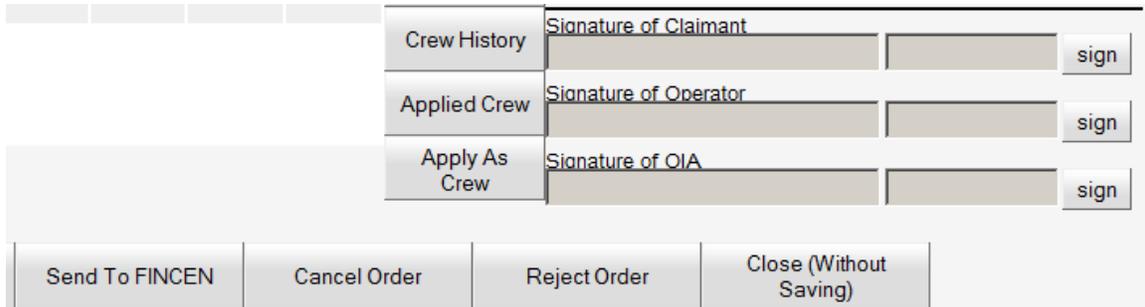


Figure 3-54 Signature Fields

NOTE 1: If the user completing the order is not the Owner/Operator, he/she needs to notify the Owner/Operator that his/her signature is now required.

NOTE 2: The Claimant signature is not required for proceeding with completing the order, but the Operator signature is required.

To sign the order, perform the following steps:

1. Click the **Sign** button to the right of the **Signature** field (see [Figure 3-54](#)).

A signature dialog box appears, similar to the following:

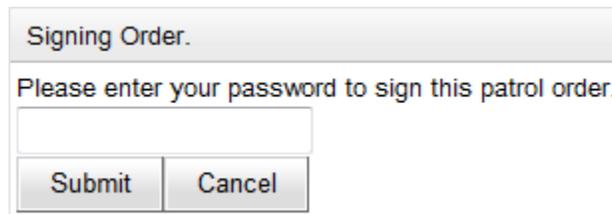


Figure 3-55 Signature Dialog Box

2. Enter the {password}, and then click **Submit**.

A confirmation appears, similar to the following:

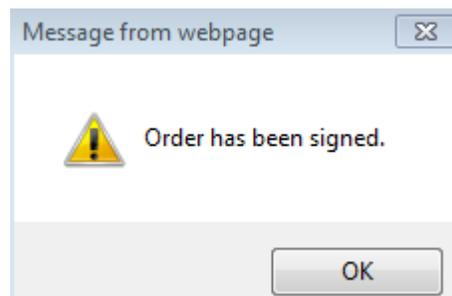


Figure 3-56 Order Signed

3. Click **OK**.

The signature appears in the **Signature** field.

4. After the {operator signature} is entered, click **Complete Order**.

A confirmation appears, similar to the following:

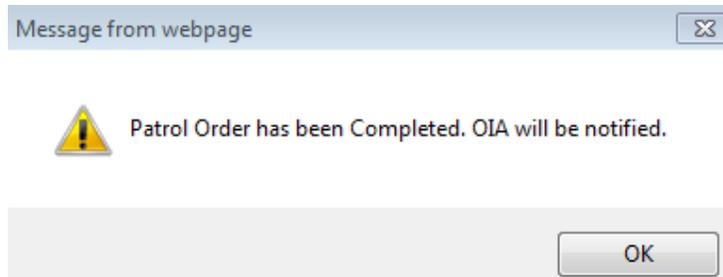


Figure 3-57 Patrol Order Completed

5. Click **OK**.

The OIA is notified that the order has been set to Complete, and the order appears purple on the calendar.

NOTE 1: Once the order is sent to the OIA, the Owner/Operator cannot change, delete, or add anything to the order. If the Owner/Operator made a mistake or forgot something after sending the order to the OIA, they need to contact the OIA and have the OIA reject the order so that the Owner/Operator can make the corrections.

NOTE 2: If the **Complete Order** button is clicked without the necessary signature, a message similar to the following appears:



Figure 3-58 Missing Signature Warning

Clicking **OK** returns the user to the order so that the appropriate signature may be added.

3.5.7.1 OIA Signature

After the OIA is notified and thoroughly reviews and verifies the patrol details (crew, receipts, itinerary, patrol hours, etc.), he/she can cancel the order, reject the order, or approve the order and send it to FINCEN. The instructions for canceling or rejecting an order are similar to [Steps 3-4](#) in [Section 3.3.2, Denying a Request](#). The steps for approving/signing the completed order and submitting it to FINCEN are as follows:

NOTE: Once the order is submitted to FINCEN, no one can change anything on the order.

1. Follow the same procedure as in [Steps 1-3](#) in [Section 3.5.7, Obtaining Signatures to Complete and Submit Orders](#).
2. Click **Send to FINCEN**.

A confirmation appears, similar to the following:

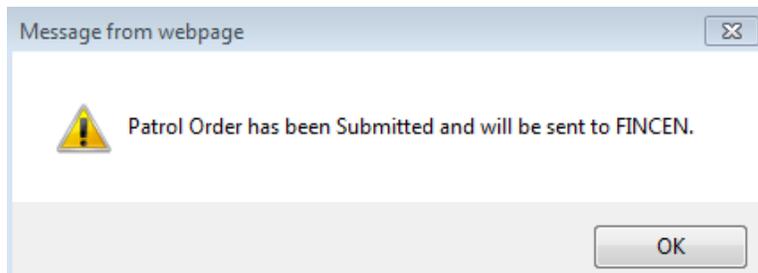


Figure 3-59 Patrol Order Submitted and Sent to FINCEN

3. Click **OK**.

The order appears orange on the calendar.

3.6 Viewing an Order History

Users can view an order's history to see actions taken and other information. The **Order History** link appears at the bottom left of patrol orders, similar to the following:

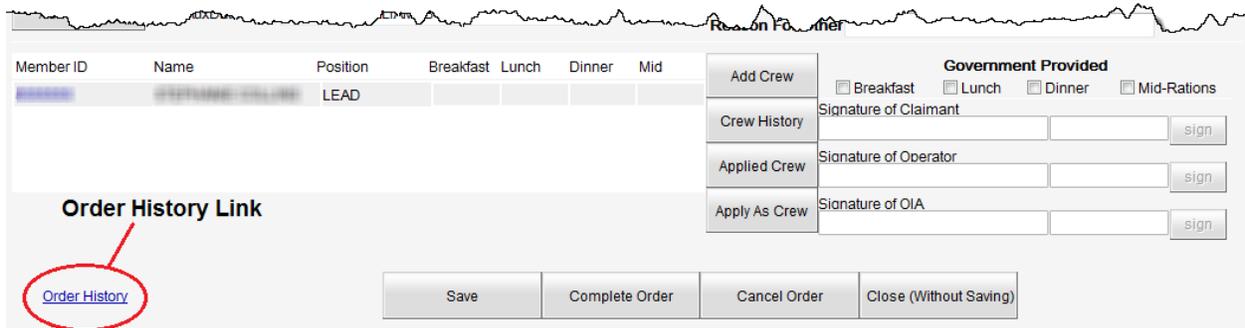


Figure 3-60 Order History Link on Patrol Order

Perform the following steps to view an order's history:

1. Click the **Order History** link.

The **Order History** window appears, similar to the following:

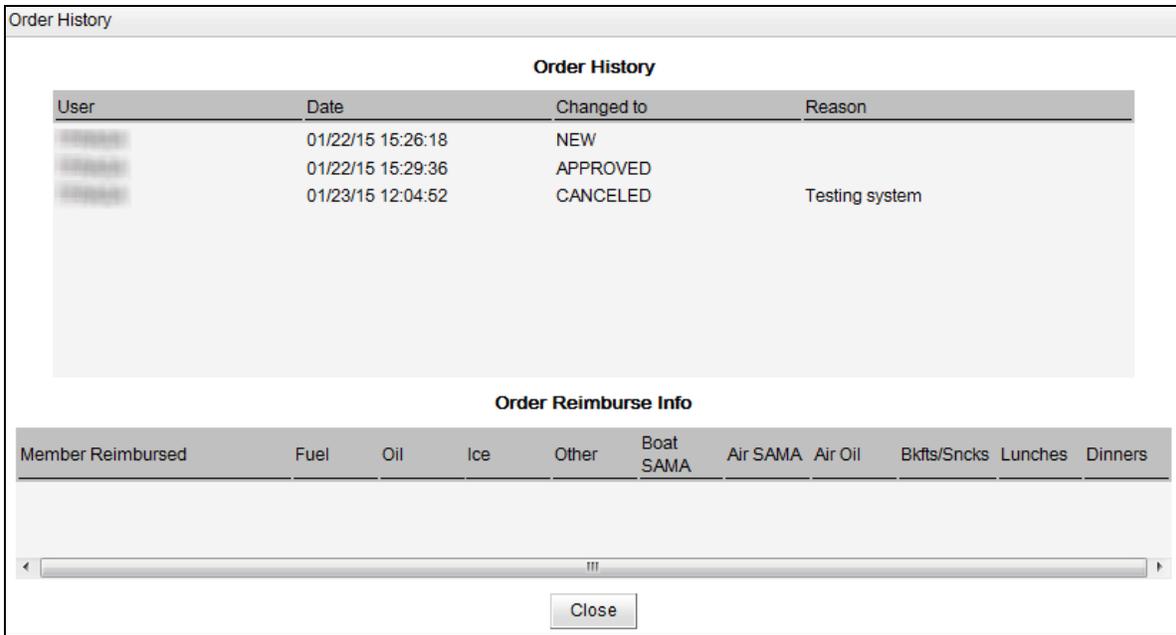


Figure 3-61 Order History Window

2. Click **Close** to return to the patrol order.

4. DISTRICT-LEVEL USERS

District-level users have unique permissions that allow them to perform special functions. The following subsections detail these functions.

4.1 District Summary

The district-level users' home page appears similar to the following:

Location	Total Patrols	Completed Patrols	Cancelled Patrols	Mis. Hours	Eng. Hours	Auto Miles	Fuel (GAL)	Fuel (\$)	Ice(\$)	Other(\$)	Boat Oil(\$)	Boat SAMA Air Oil(\$)	Air SAMA
AS BARBERS POINT	91	41	31	101.8	82.6	.0	1,420.0	\$7,461.07	\$0.00	\$0.00	\$0.00	\$278.05	\$4,439.32
GUAM	16	11	4	67.0	28.0	8.0	68.7	\$245.73	\$13.89	\$10.00	\$25.00	\$191.62	\$0.00
HONOLULU	95	23	10	191.0	12.5	10.0	207.2	\$474.15	\$8.30	\$0.00	\$0.00	\$115.34	\$0.00
TOTAL	142	75	45	299.8	123.1	18.0	1,685.9	\$8,180.95	\$21.89	\$10.00	\$25.00	\$306.96	\$278.05

Figure 4-1 District Summary Page

The district-level users' home page is populated with the details of patrol orders in the **District Summary** tab. The details can be filtered by date using the **Fiscal Year** and **Month** picklists.

4.2 SAMA Distribution

Clicking the **SAMA Distribution** tab yields a screen similar to the following:

Location Name	Boat SAMA	Air SAMA	Total SAMA
AIR STATION BARBERS POINT	0.00	25000.00	25000.00
SECTOR HONOLULU	3000.00	0.00	3000.00
SECTOR GUAM	3000.00	0.00	3000.00

Figure 4-2 SAMA Distribution

Perform the following steps to update the budget amounts for either **Boat SAMA** or **Air SAMA**:

1. For the appropriate *{location}*, update the *{amount}* under either **Boat SAMA** or **Air SAMA**.
2. Click **Save**.

A confirmation appears, similar to the following:

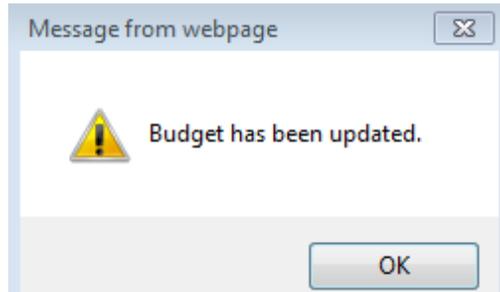


Figure 4-3 Budget Update Message

3. Click **OK**.

4.3 District SAMA Forecast

Clicking the **District SAMA Forecast** tab yields a screen similar to the following:

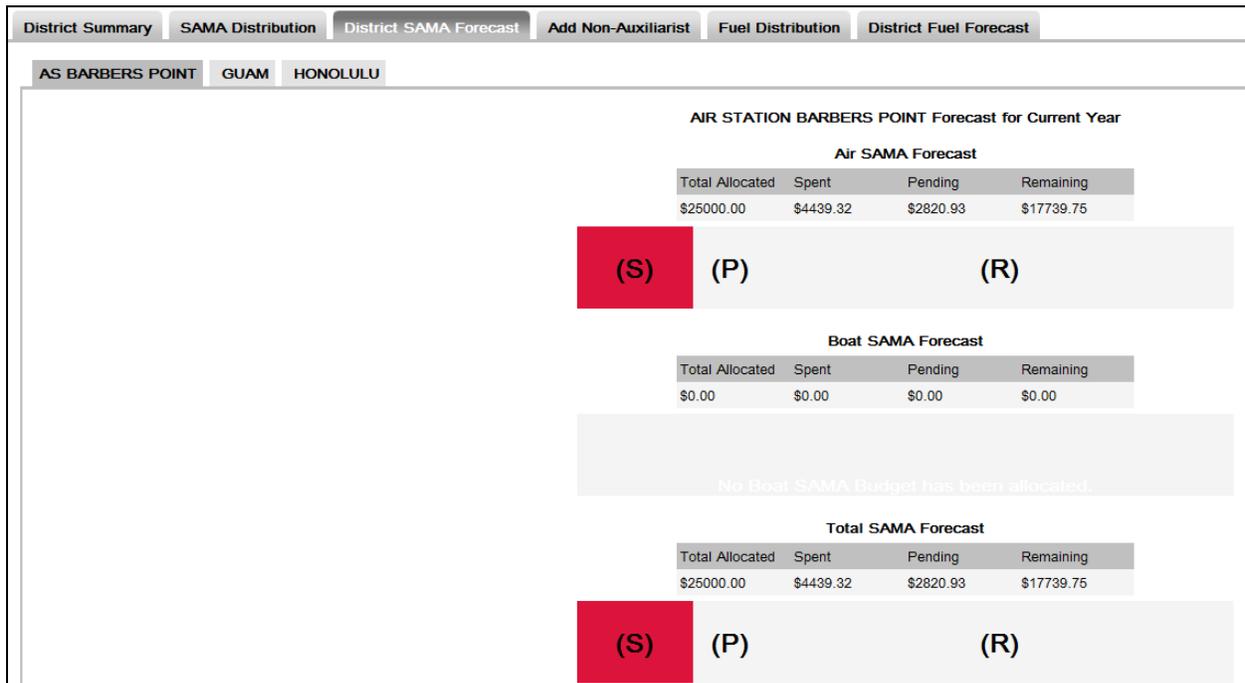


Figure 4-4 District SAMA Forecast Screen

Click each *{location's}* respective tab to view its details.

NOTE: (S) stands for **Spent**, (P) stands for **Pending**, and (R) stands for **Remaining**. Pointing the mouse cursor to each letter in the budget progress bar reveals a short message with budget details, similar to [Figure 2-32](#).

4.4 Add Non-Auxiliarist

Clicking the **Add Non-Auxiliarist** tab yields a screen similar to the following:



Figure 4-5 Add Non-Auxiliarist Screen

Perform the following steps to add a non-Auxiliarist:

1. Enter the individual's *{member ID}*, *{first name}*, *{middle name}*, *{last name}*, *{email address}*, and *{phone number}* in the respective fields.
2. Click the **Active Duty** checkbox if appropriate.
3. Select where the user will be assigned by clicking the box beside the appropriate location.
4. Select the user's role by clicking the radio button beside the appropriate option.
5. Click **Add**.

A confirmation appears, similar to the following:

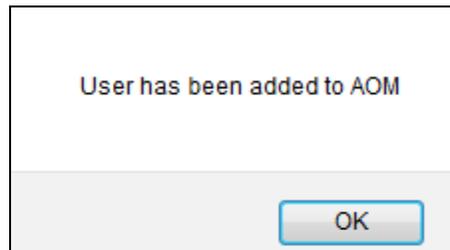


Figure 4-6 Added User Message

6. Click **OK**.

NOTE 1: *If the {information} has been entered incorrectly, an error message appears similar to [Figure 4-7](#). Click **OK**, and then either enter the correct {information} or contact the help desk for assistance.*

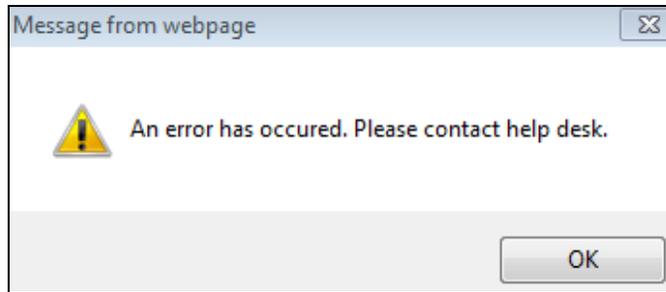


Figure 4-7 Error Message

NOTE 2: If a user already exists in AOM, a message similar to the following appears. Click **OK**.

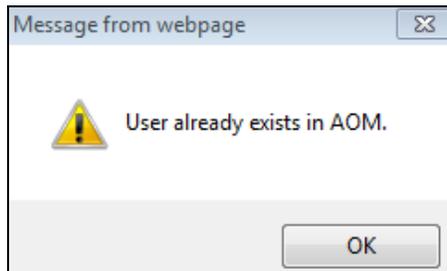


Figure 4-8 User Already Exists Message

4.5 Fuel Distribution

Clicking the **Fuel Distribution** tab yields a screen with fields similar to the following:

District Summary SAMA Distribution District SAMA Forecast Add Non-Auxiliarist Fuel Distribution D			
Fuel Distribution		Fiscal Year: 2015	
FY Total Budget: 43434.00		Funds Available: 31434.00	
Location Name	Boat Fuel	Air Fuel	Total Fuel
AIR STATION BARBERS POINT	0.00	10000.00	10000.00
SECTOR HONOLULU	1000.00	0.00	1000.00
SECTOR GUAM	1000.00	0.00	1000.00
Save			

Figure 4-9 Fuel Distribution

Perform the following steps to update the budget amounts for either **Boat Fuel** or **Air Fuel**:

1. For the appropriate *{location}*, update the *{amount}* under either **Boat Fuel** or **Air Fuel**.
2. Click **Save**.

A confirmation appears, similar to [Figure 4-3](#).

3. Click **OK**.

4.6 District Fuel Forecast

Clicking the **District Fuel Forecast** tab yields a screen similar to the following:

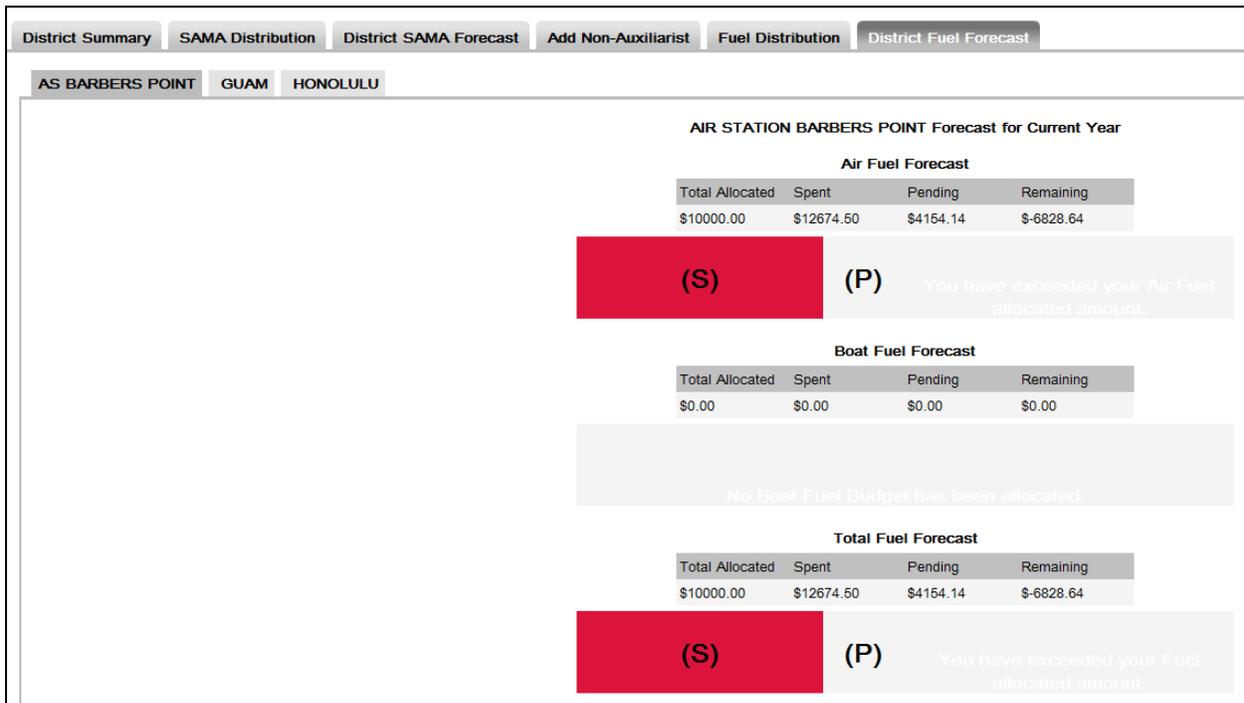


Figure 4-10 District Fuel Forecast Screen

Click each *{location's}* respective tab to view its details.

NOTE: (S) stands for **Spent**, (P) stands for **Pending**, and (R) stands for **Remaining**. Pointing the mouse cursor to each letter in the budget progress bar reveals a short message with budget details, similar to [Figure 2-32](#).

5. AUXILIARY NATIONAL UNIT USERS

Auxiliary National Unit users have unique permissions that allow them to perform special functions. The following subsections describe these functions in detail.

5.1 National Summary

The Auxiliary National Unit users' home page appears similar to the following:

Location	Total Patrols	Completed Patrols	Canceled Patrols	Mis. Hours	Eng. Hours	Auto Miles	Fuel (GAL)	Fuel (\$)	Ice(\$)	Other(\$)	Boat Oil(\$)	Boat SAMA	Air Oil(\$)	Air SAMA
D01NR	218	117	92	585.0	426.4	96.4	9,378.9	\$15,726.68	\$110.00	\$59.00	\$204.61	\$2,154.47	\$334.25	\$5,953.07
D01SR	563	284	175	1,942.2	991.1	1,894.6	7,735.6	\$34,629.77	\$262.69	\$279.70	\$614.10	\$5,106.03	\$809.35	\$14,024.83
D05NR	131	57	59	342.7	227.0	589.0	1,633.4	\$8,270.00	\$23.98	\$75.99	\$0.00	\$280.19	\$377.35	\$6,137.52
U140	142	76	-5	299.8	123.1	18.0	1,685.9	\$8,164.95	\$21.89	\$10.00	\$26.00	\$306.96	\$278.05	\$4,439.02
D170	29	7	22	23.9	23.4	.0	153.1	\$698.60	\$0.00	\$0.00	\$0.00	\$141.59	\$0.00	\$0.00
TOTAL	6,381	3,007	1,737	16,661.8	11,792.6	43,875.1	74,219.3	\$303,768.62	\$2,521.61	\$3,330.15	\$7,966.73	\$60,933.29	\$7,108.40	\$127,109.20

Figure 5-1 National Summary Page

The Auxiliary National Unit users' home page is populated with the details of patrol orders in the **National Summary** tab. The details can be filtered by date using the **Fiscal Year** and **Month** picklists.

5.2 Budget Distributions

The **Budget Distributions** tab reveals the total budget, funds spent, and funds remaining for **SAMA** and **Fuel**, similar to the following:

NATIONAL	SAMA	Fuel	Total
TOTAL	1322000.00	2120371.00	3442371.00
SPENT	1322000.00	1898854.00	3220854.00
REMAINING	0.00	221517.00	221517.00
DISTRICT	SAMA	Fuel	Total
FIRST DISTRICT NORTHERN REGION	59925.26	165613.00	225538.26
FIRST SOUTHERN	221218.00	248419.00	479637.00
FOURTEENTH DISTRICT	40131.00	43434.00	83565.00
SEVENTEENTH DISTRICT	9500.00	12235.00	21735.00

Figure 5-2 National and District Budgets Page

5.2.1 Editing a Budget

To edit a budget, select the *{dollar amounts}*, edit the information, and then click **Save**.

A confirmation appears, similar to [Figure 4-3](#).

Click **OK**.

5.3 SAMA Boat Rates

Clicking the **SAMA Boat Rates** tab yields a screen similar to the following:

Type	Min Length	Max Length	Min Horse Power	Max Horse Power	Number of Engines	Rate Per Hour	Active
A	0	16	0	9999	0	3.75	Active
B	17	26	0	179	1	4.28	Active
C	17	26	180	229	1	5.63	Active
D	17	26	360	459	2	9	Active
E	17	26	230	9999	1	5.78	Active
F	17	26	460	9999	2	9.98	Active
G	27	40	0	9999	0	9.23	Active
H	41	9999	0	9999	0	11.25	Active
I	17	26	0	360	2	7.13	Active
Z	0	9999	0	9999	0	0	Active

Type : Active

Rate/Hour: Minimum Horse Power: Minimum Length:

Number of Engines: Maximum Horse Power: Maximum Length:

Figure 5-3 SAMA Boat Rates

5.3.1 Editing SAMA Boat Rates

Perform the following steps to edit the SAMA boat rates:

1. In the **SAMA Boat Rates** list, click on a *{type}*.

The specific details of the selected type appear, similar to the following:

Type	Min Length	Max Length	Min Horse Power	Max Horse Power	Number of Engines	Rate Per Hour	Active
A	0	16	0	9999	0	3.75	Active
B	17	26	0	179	1	4.28	Active
C	17	26	180	229	1	5.63	Active
D	17	26	360	459	2	9	Active
E	17	26	230	9999	1	5.78	Active
F	17	26	460	9999	2	9.98	Active
G	27	40	0	9999	0	9.23	Active
H	41	9999	0	9999	0	11.25	Active
I	17	26	0	360	2	7.13	Active
Z	0	9999	0	9999	0	0	Active

Details

Type : A Active

Rate/Hour: 3.75 Minimum Horse Power: 0 Minimum Length: 0

Number of Engines: 0 Maximum Horse Power: 9,999 Maximum Length: 16

Figure 5-4 SAMA Boat Rate Details

2. Edit the desired *{value}*, and then click **Update**.

A confirmation appears, similar to the following:

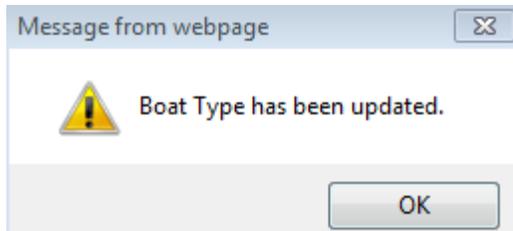


Figure 5-5 Boat Type Update Message

3. Click **OK**.

5.4 SAMA Air Rates

Clicking the **SAMA Air Rates** tab yields a screen similar to the following:

Type	Multi-Eng	S-HP	E-HP	Maintenance	Oil	Active
1	false	60	129	30.4	1.5	Active
2	false	130	199	38.95	2	Active
3	false	200	235	40.85	2.5	Active
4	false	236	299	49.4	3	Active
5	false	300	400	63.65	4	Active
6	true	1	400	67.45	4	Active
7	true	401	499	77.9	5	Active
8	true	500	700	89.3	7	Active

Figure 5-6 SAMA Air Rates

5.4.1 Editing SAMA Air Rates

Perform the following steps to edit the SAMA air rates as appropriate:

1. In the **SAMA Air Rates** list, click on a *{type}*.

The specific details of the selected type appear, similar to the following:

Type	Multi-Eng	S-HP	E-HP	Maintenance	Oil	Active
1	false	60	129	30.4	1.5	Active
2	false	130	199	38.95	2	Active
3	false	200	235	40.85	2.5	Active
4	false	236	299	49.4	3	Active
5	false	300	400	63.65	4	Active
6	true	1	400	67.45	4	Active
7	true	401	499	77.9	5	Active
8	true	500	700	89.3	7	Active

Figure 5-7 SAMA Air Rate Details

2. Edit the desired *{value}*, and then click **Update**.

A confirmation appears, similar to the following:

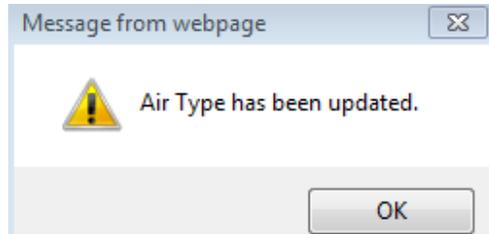


Figure 5-8 Air Type Update Message

3. Click **OK**.

5.5 Type 9 Air Rates

Clicking the **Type 9 Air Rates** tab yields a screen similar to the following:

Resource HTN	Maintenance Rate	Oil Rate	Modified By	Modified Date	Remove
8811888	232.33	0	XXXXXXXXXX	04/18/13	Remove
8811888	386.46	0	XXXXXXXXXX	04/18/13	Remove
8887788	117	0	XXXXXXXXXX	04/18/13	Remove

Figure 5-9 Type 9 Air Rates

5.5.1 Editing a Type 9 Resource

Perform the following steps to edit an existing Type 9 resource:

1. Select the *{resource}* to be edited.

The current values for the selected resource appear, similar to the following:

Resource HTN	Maintenance Rate	Oil Rate	Modified By	Modified Date	Remove
8811888	232.33	0	XXXXXXXXXX	04/18/13	Remove
8811888	386.46	0	XXXXXXXXXX	04/18/13	Remove

Figure 5-10 Current Resource Values

2. Edit the desired *{value}*, and then click **Save**

A confirmation appears, similar to the following:

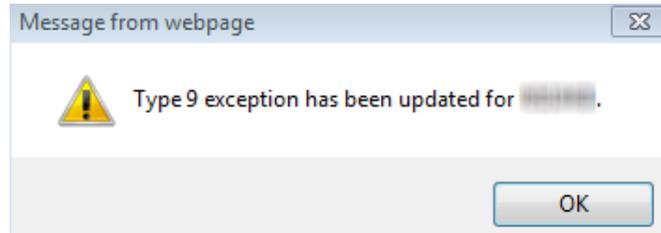


Figure 5-11 Type 9 Updated Resource Message

3. Click **OK**.

5.5.2 Adding a Type 9 Resource

Perform the following steps to add a Type 9 resource:

1. Enter the following information, and then click **Save**.
 - In the **Resource HTN** field, enter the *{resource identifier}*.
 - In the **Maintenance Rate** field, enter the *{maintenance rate}*.
 - In the **Oil Rate** field, enter the *{oil rate}*.

A confirmation appears, similar to the following:

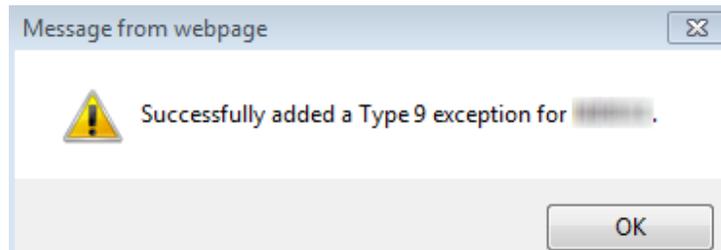


Figure 5-12 Type 9 Added Resource Message

2. Click **OK**.

5.5.3 Removing a Type 9 Resource

Perform the following steps to remove a Type 9 resource:

1. In the row for the resource that needs to be removed, click **Remove**.

A confirmation appears, similar to the following:

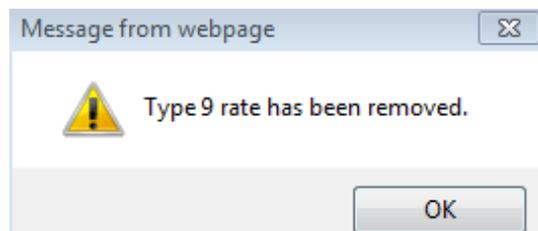


Figure 5-13 Type 9 Resource Removed Message

2. Click **OK**.

5.6 SAMA Boat Exceptions

Clicking the **SAMA Boat Exceptions** tab yields a screen similar to the following:

The screenshot shows a web application interface with several tabs: National Summary, Budget Distributions, SAMA Boat Rates, SAMA Air Rates, Type 9 Air Rates, and SAMA Boat Exceptions. The SAMA Boat Exceptions tab is active. On the left, there is a table titled "Current SAMA Boat Rates" with columns for Type, Rate Per Hour, and Active. The table lists types A through Z with their respective rates and active status. On the right, there is a form titled "Sama Boat Exceptions" with fields for "Resource HTN:" and "Maintenance Type:". Below the form is a "Save" button. Underneath the form is a table with columns for Facility HTN, SAMA Type, Modified By, Modified Date, and Remove. The table lists several facilities with their SAMA Type (Z), Modified Date (02/21/13), and a "Remove" button. At the bottom of the screen, there are two notes: "Note 1: Any facilities in this list have the rate exception nationwide. They will continue to be reimbursed at this rate until removed from the list. Once removed, the facility will return to its default rate/type." and "Note 2: To update an exception, simply save it again at the desired type."

Figure 5-14 SAMA Boat Exceptions

5.6.1 Editing a SAMA Boat Exception

Perform the following steps to edit an existing SAMA boat exception:

1. Enter the *{resource identifier}* in the **Resource HTN** field, select the desired type from the **Maintenance Type** picklist, and then click **Save**.

A confirmation appears, similar to the following:



Figure 5-15 Updated SAMA Exception Message

2. Click **OK**.

5.6.2 Adding a SAMA Boat Exception

Perform the following steps to add a SAMA boat exception:

1. Enter the following information, and then click **Save**.
 - In the **Resource HTN** field, enter the *{resource identifier}*.
 - In the **Maintenance Type** checklist, select the *{maintenance type}*.

A confirmation appears, similar to the following:

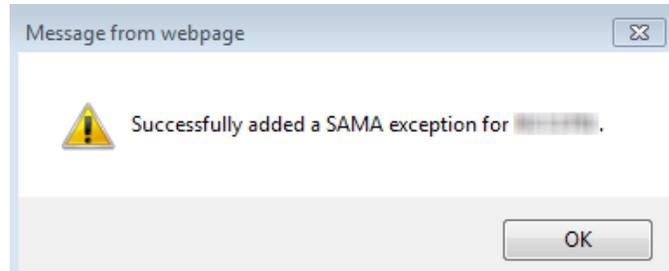


Figure 5-16 Added SAMA Exception Message

2. Click **OK**.

5.6.3 Removing a SAMA Boat Exception

Perform the following steps to remove an existing SAMA boat exception:

1. In the row for the exception that needs to be removed, click **Remove**.

A confirmation appears, similar to the following:

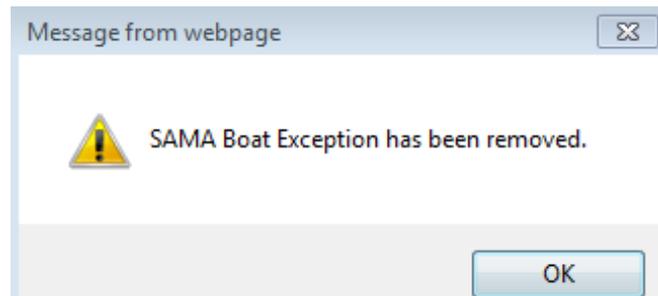


Figure 5-17 Removed SAMA Boat Exception Message

2. Click **OK**.