AUXDATA Order Management Overview Guide

Version 4.0

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Table of Contents

1. PREFACE ............................................................................................................................. 1
   1.1 Purpose .............................................................................................................................. 1
   1.1.1 Purpose of AOM .......................................................................................................... 1
   1.2 Intended Audience ............................................................................................................ 1
   1.3 Style Conventions ............................................................................................................ 1
   1.4 Security and Privacy ........................................................................................................ 2

2. AOM FUNCTIONALITY ......................................................................................................... 3
   2.1 Logging In to AOM ........................................................................................................... 3
   2.1.1 Password Reset ........................................................................................................... 5
   2.2 Main Menu Navigational Tools ....................................................................................... 7
       2.2.1 Home ......................................................................................................................... 7
       2.2.2 Reports ..................................................................................................................... 7
       2.2.3 Search ....................................................................................................................... 8
       2.2.4 User Admin ............................................................................................................... 13
       2.2.5 Location Admin ........................................................................................................ 19
       2.2.6 My Account ............................................................................................................. 25

3. PATROL ORDERS (OWNER/OPERATOR AND OIA) ......................................................... 26
   3.1 Requesting Orders .......................................................................................................... 26
       3.1.1 Requesting Order When Owner Is Not Operator ....................................................... 30
   3.2 Creating New Open Patrol Orders .................................................................................. 33
   3.3 Actions for Requests ....................................................................................................... 34
       3.3.1 Approving a Request ............................................................................................... 35
       3.3.2 Denying a Request .................................................................................................... 36
       3.3.3 Re-Activating a Request ......................................................................................... 36
       3.3.4 Editing a Request ...................................................................................................... 37
       3.3.5 Deleting a Request ................................................................................................... 38
       3.3.6 Claiming or Deleting Open Patrol Order Requests .................................................. 38
   3.4 Crew Assignments ......................................................................................................... 40
       3.4.1 Options for Adding Crew ........................................................................................ 41
       3.4.2 Applying as Crew ..................................................................................................... 45
       3.4.3 Updating Crew Information .................................................................................... 45
       3.4.4 Removing a Crew Member From an Order ............................................................... 46
       3.4.5 Overriding the Crew Requirement .......................................................................... 46
   3.5 Completing a Patrol Order .............................................................................................. 47
       3.5.1 Comments ............................................................................................................... 48
       3.5.2 Facility and Automobile Data .................................................................................. 49
       3.5.3 Expenses ................................................................................................................ 49
       3.5.4 Itineraries ................................................................................................................ 55
       3.5.5 AuxData Unit .......................................................................................................... 56
       3.5.6 Saving Before Obtaining Signatures ...................................................................... 56
       3.5.7 Obtaining Signatures to Complete and Submit Orders ............................................. 57
   3.6 Viewing an Order History .............................................................................................. 59

4. DISTRICT-LEVEL USERS .................................................................................................. 61
   4.1 District Summary ............................................................................................................. 61
   4.2 SAMA Distribution ........................................................................................................ 61
   4.3 District SAMA Forecast ................................................................................................ 62
4.4 Add Non-Auxiliarist ................................................................. 63
4.5 Fuel Distribution ................................................................. 64
4.6 District Fuel Forecast ......................................................... 65

5. AUXILIARY NATIONAL UNIT USERS ............................................. 67
  5.1 National Summary ......................................................... 67
  5.2 Budget Distributions ...................................................... 67
    5.2.1 Editing a Budget ....................................................... 68
  5.3 SAMA Boat Rates ......................................................... 68
    5.3.1 Editing SAMA Boat Rates ......................................... 68
  5.4 SAMA Air Rates ............................................................ 69
    5.4.1 Editing SAMA Air Rates ........................................... 69
  5.5 Type 9 Air Rates ............................................................ 70
    5.5.1 Editing a Type 9 Resource ......................................... 70
    5.5.2 Adding a Type 9 Resource .......................................... 71
    5.5.3 Removing a Type 9 Resource ....................................... 71
  5.6 SAMA Boat Exceptions .................................................. 72
    5.6.1 Editing a SAMA Boat Exception .................................. 72
    5.6.2 Adding a SAMA Boat Exception ................................... 73
    5.6.3 Removing a SAMA Boat Exception ................................ 73

List of Figures

Figure 2-1 Unauthorized Access Warning ...................................... 3
Figure 2-2 Access to AOM .......................................................... 4
Figure 2-3 AOM Login Screen .................................................... 4
Figure 2-4 Location Selection Screen .......................................... 5
Figure 2-5 AOM Main Menu ........................................................ 5
Figure 2-6 Password Reset Screen .............................................. 6
Figure 2-7 Approved Orders Agenda ............................................ 7
Figure 2-8 Report Search Screen ............................................... 7
Figure 2-9 Report Search Results ............................................... 8
Figure 2-10 Member Search Screen ............................................ 8
Figure 2-11 Member Search Results ............................................ 9
Figure 2-12 Member Information Window ..................................... 9
Figure 2-13 Information About EFT in AOM ................................. 10
Figure 2-14 AOMS User to User Message Window .......................... 10
Figure 2-15 Message Sent .......................................................... 11
Figure 2-16 Facilities Search Screen ........................................... 11
Figure 2-17 Facilities Search Results .......................................... 11

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<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figure 2-18</td>
<td>Facility Information Window</td>
<td>12</td>
</tr>
<tr>
<td>Figure 2-19</td>
<td>Orders Search Screen</td>
<td>13</td>
</tr>
<tr>
<td>Figure 2-20</td>
<td>Orders Search Results</td>
<td>13</td>
</tr>
<tr>
<td>Figure 2-21</td>
<td>User Admin Screen</td>
<td>14</td>
</tr>
<tr>
<td>Figure 2-22</td>
<td>Available Users List</td>
<td>14</td>
</tr>
<tr>
<td>Figure 2-23</td>
<td>User Created and Added Message</td>
<td>15</td>
</tr>
<tr>
<td>Figure 2-24</td>
<td>User Already Exists Message</td>
<td>15</td>
</tr>
<tr>
<td>Figure 2-25</td>
<td>User Search Window</td>
<td>16</td>
</tr>
<tr>
<td>Figure 2-26</td>
<td>User Search Results</td>
<td>16</td>
</tr>
<tr>
<td>Figure 2-27</td>
<td>User Removal Message</td>
<td>17</td>
</tr>
<tr>
<td>Figure 2-28</td>
<td>Update Message</td>
<td>17</td>
</tr>
<tr>
<td>Figure 2-29</td>
<td>Available Users List</td>
<td>18</td>
</tr>
<tr>
<td>Figure 2-30</td>
<td>User Search Results</td>
<td>18</td>
</tr>
<tr>
<td>Figure 2-31</td>
<td>Reinstate User Message</td>
<td>19</td>
</tr>
<tr>
<td>Figure 2-32</td>
<td>Location Admin Screen</td>
<td>19</td>
</tr>
<tr>
<td>Figure 2-33</td>
<td>Location Detail Screen</td>
<td>20</td>
</tr>
<tr>
<td>Figure 2-34</td>
<td>Location SAMA Forecast Screen</td>
<td>20</td>
</tr>
<tr>
<td>Figure 2-35</td>
<td>Budget Progress Bar Message</td>
<td>21</td>
</tr>
<tr>
<td>Figure 2-36</td>
<td>Patrol Orders Screen</td>
<td>21</td>
</tr>
<tr>
<td>Figure 2-37</td>
<td>Sub Units/Patrol Areas Screen</td>
<td>22</td>
</tr>
<tr>
<td>Figure 2-38</td>
<td>Sub Unit Name Field</td>
<td>22</td>
</tr>
<tr>
<td>Figure 2-39</td>
<td>NSF SAMA Queue</td>
<td>23</td>
</tr>
<tr>
<td>Figure 2-40</td>
<td>Location Fuel Forecast Screen</td>
<td>24</td>
</tr>
<tr>
<td>Figure 2-41</td>
<td>NSF Fuel Queue</td>
<td>24</td>
</tr>
<tr>
<td>Figure 2-42</td>
<td>My Account Screen</td>
<td>25</td>
</tr>
<tr>
<td>Figure 2-43</td>
<td>Password Change Success Message</td>
<td>25</td>
</tr>
<tr>
<td>Figure 3-1</td>
<td>SAMA Level Advisory</td>
<td>26</td>
</tr>
<tr>
<td>Figure 3-2</td>
<td>Blank Patrol Order</td>
<td>27</td>
</tr>
<tr>
<td>Figure 3-3</td>
<td>Facility Information</td>
<td>27</td>
</tr>
<tr>
<td>Figure 3-4</td>
<td>Owner Information</td>
<td>28</td>
</tr>
<tr>
<td>Figure 3-5</td>
<td>Facility Owner’s Status</td>
<td>28</td>
</tr>
<tr>
<td>Figure 3-6</td>
<td>Calendar</td>
<td>28</td>
</tr>
<tr>
<td>Figure 3-7</td>
<td>Date and Accounting Codes</td>
<td>29</td>
</tr>
</tbody>
</table>
Figure 3-41  Crew Override Confirmation .................................................................47
Figure 3-42  Crew Requirement Overridden ..............................................................47
Figure 3-43  Patrol Order to Be Completed After Mission ........................................48
Figure 3-44  Receipts for Order Window ..................................................................50
Figure 3-45  Receipt Has Been Uploaded Message ....................................................50
Figure 3-46  Receipts to Submit ..................................................................................51
Figure 3-47  Receipt Count on Patrol Order .................................................................51
Figure 3-48  Receipt Window With Option to Delete ....................................................52
Figure 3-49  Receipts to Delete ....................................................................................53
Figure 3-50  Receipt Deletion Confirmation .................................................................53
Figure 3-51  Receipt Window With Option to Undo Delete .........................................54
Figure 3-52  Blank Itinerary .......................................................................................55
Figure 3-53  Patrol Order Saved ................................................................................56
Figure 3-54  Signature Fields .....................................................................................57
Figure 3-55  Signature Dialog Box ............................................................................57
Figure 3-56  Order Signed .........................................................................................57
Figure 3-57  Patrol Order Completed .........................................................................58
Figure 3-58  Missing Signature Warning ....................................................................58
Figure 3-59  Patrol Order Submitted and Sent to FINCEN ........................................59
Figure 3-60  Order History Link on Patrol Order ......................................................59
Figure 3-61  Order History Window .........................................................................60
Figure 4-1  District Summary Page ............................................................................61
Figure 4-2  SAMA Distribution .................................................................................61
Figure 4-3  Budget Update Message .........................................................................62
Figure 4-4  District SAMA Forecast Screen ...............................................................62
Figure 4-5  Add Non-Auxiliarist Screen ..................................................................63
Figure 4-6  Added User Message ..............................................................................63
Figure 4-7  Error Message .........................................................................................64
Figure 4-8  User Already Exists Message ..................................................................64
Figure 4-9  Fuel Distribution .....................................................................................65
Figure 4-10  District Fuel Forecast Screen .................................................................66
Figure 5-1  National Summary Page ..........................................................................67
Figure 5-2  National and District Budgets Page ..........................................................67
Figure 5-3  SAMA Boat Rates ...........................................................................................................68
Figure 5-4  SAMA Boat Rate Details ..............................................................................................68
Figure 5-5  Boat Type Update Message ..........................................................................................69
Figure 5-6  SAMA Air Rates ............................................................................................................69
Figure 5-7  SAMA Air Rate Details ................................................................................................69
Figure 5-8  Air Type Update Message ............................................................................................70
Figure 5-9  Type 9 Air Rates ...........................................................................................................70
Figure 5-10 Current Resource Values ............................................................................................70
Figure 5-11 Type 9 Updated Resource Message ...........................................................................71
Figure 5-12 Type 9 Added Resource Message ..............................................................................71
Figure 5-13 Type 9 Resource Removed Message ..........................................................................72
Figure 5-14 SAMA Boat Exceptions ..............................................................................................72
Figure 5-15 Updated SAMA Exception Message ..........................................................................73
Figure 5-16 Added SAMA Exception Message .............................................................................73
Figure 5-17 Removed SAMA Boat Exception Message ................................................................74
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 an 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:

![Unauthorized Access Warning](image)

**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:

![Access to AOM Screen](image)

Figure 2-2 Access to AOM

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

   The Login screen appears, similar to the following figure:

![Login Screen](image)

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.
5. 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.

![Location Selection Screen](image)

**Figure 2-4** Location Selection Screen

6. 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:*

![AOM Main Menu](image)

**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 e-mail message with their new username. Upon receipt of that e-mail 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:

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

   The Password Reset screen appears, similar to the following figure:

![Password Reset Screen](image)

   **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 e-mailed to the first e-mail 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 e-mail 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, 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. Click the Agenda tab to yield a screen similar to the following figure:

![Figure 2-7 Approved Orders Agenda](image)

Figure 2-7 Approved Orders Agenda

Click the Order Number to open 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. Click the Reports button to yield a screen with search options similar to the following figure:

![Figure 2-8 Report Search Screen](image)

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 figure:

![Figure 2-9 Report Search Results](image)

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

Click the Members tab to yield a screen similar to the following figure:

![Figure 2-10 Member Search Screen](image)

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

   *The search results appear, similar to the following figure:*

![Member Search Results](image)

**Figure 2-11 Member Search Results**

3. 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.

![Member Information Window](image)

**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:
4. After viewing the member information, click Close to return to the search results.

5. To send a message to the member, click his/her E-mail 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:

   ![Figure 2-14 AOMS User to User Message Window](image)

   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:

   ![Image](image)
7. Click OK.

2.2.3.2 Searching for Facilities
Click the Facilities tab to yield a screen similar to the following figure:

![Facilities Search Screen](Image)

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:

![Facilities Search Results](Image)

Figure 2-17 Facilities Search Results
3. To view facility information, click the Facility HTN.

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

![Facility Information Window](image)

**Figure 2-18 Facility Information Window**

**NOTE 1:** Click the member ID beside the member name to yield a Member Information window similar to Figure 2-12. Refer to 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.

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

**2.2.3.3 Searching for Orders**

Click the Orders tab to yield a screen similar to the following figure:
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 figure:

**Figure 2-20 Orders Search Results**

**NOTE:** Click a Facility HTN to yield a Facility Information window similar to Figure 2-18. Click an Operator ID to yield 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.

Click the User Admin button to yield a screen similar to the following figure:
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:
2.2.4.1.1 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 (refer to Figure 2-22).

1. Select the appropriate {name} in the list, and then click Add User. A confirmation appears, similar to the following figure:

![Figure 2-23 User Created and Added Message](image)

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, refer to 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](image)

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 (refer to Figure 2-22).

1. Click the User Search tab.
The User Search window appears, similar to the following figure:

![User Search Window](image)

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:

![User Search Results](image)

Figure 2-26 User Search Results

4. Click the appropriate {name}, and then click Select.
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 (refer to **Figure 2-21**), click the **Remove** button beside the `{user}` to be deleted.

   *A confirmation appears, similar to the following figure:*

   ![User Removal Message](image1)

   **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:*

   ![Update Message](image2)

   **Figure 2-28 Update Message**

2. Click **OK**.
2.2.4.4 Reinstate User Account

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

1. Under the list of names on the User Admin screen, click Reinstate a User Account.

   *The Available Users List appears, similar to the following figure:*

   ![Available Users List](image)

   **Figure 2-29 Available Users List**

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:*

   ![User Search Results](image)

   **Figure 2-30 User Search Results**

4. Click the appropriate `{name}`, and then click Select.
A confirmation appears, similar to the following figure:

![Reinstate User Message]

Figure 2-31 Reinstate User Message

5. Click OK.

The user is added to the database with all current account information.

2.2.5 Location Admin

The Location Admin button allows authorized users to add sub units and patrol areas and to view requests and their status and many more location-specific details. Click the Location Admin button to yield a screen similar to the following figure:

![Location Admin Screen]

Figure 2-32 Location Admin Screen

**NOTE:** The Location Admin screen defaults to the Location Summary tab. This screen summarizes patrols by months in the selected fiscal year.

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

The appropriate data appears.
2.2.5.1 Location Detail

Click the **Location Detail** tab to yield a monthly-summarized report of unit patrols similar to the following figure:

![Location Detail Screen](image)

**Figure 2-33 Location Detail Screen**

To change the date, select the appropriate **Fiscal Year** and **Month** from those respective picklists, and then click **Go**.

*The appropriate data appears.*

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.

---

2.2.5.2 Location Standard Auxiliary Maintenance Allowance (SAMA) Forecast

Click the **Location SAMA Forecast** tab to yield a screen similar to the following figure:

![Location SAMA Forecast Screen](image)

**Figure 2-34 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:

![Budget Progress Bar Message](image)

Figure 2-35  Budget Progress Bar Message

2.2.5.3 Patrol Orders

Click the Patrol Orders tab to yield a screen similar to the following figure:

![Patrol Orders Screen](image)

Figure 2-36  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

Click the Sub Units/Patrol Areas tab to yield a screen similar to the following figure:
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 figure:

   ![Sub Unit Name Field](image)

   **Figure 2-38 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.

\textit{NOTE:} Be as descriptive as possible for the patrol area’s boundaries.
4. Click Save.

\textit{The new patrol area appears in the Patrol Area field.}

2.2.5.5 Non-Sufficient Funds (NSF) SAMA Queue

Click the NSF SAMA Queue tab to yield a screen similar to the following figure:

\begin{figure}
\centering
\includegraphics[width=\textwidth]{NSF_SAMA_Queue.png}
\caption{NSF SAMA Queue}
\end{figure}

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

\textit{The appropriate data appears.}

2.2.5.6 Location Fuel Forecast

Click the Location Fuel Forecast tab to yield a screen similar to the following figure:
**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

Click the **NSF Fuel Queue** tab to yield a screen similar to the following figure:

![Figure 2-41 NSF Fuel Queue](image)

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. Click the **My Account** button to yield a screen similar to the following figure:

![My Account Screen](image-url)

**Figure 2-42 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:

![Password Change Success Message](image-url)

**Figure 2-43 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:

   ![Message from webpage]

   Please be advised that SAMA is low or has run out for this location. As per policy, SAMA is a first come, first served privilege and is not guaranteed for any order.

   Figure 3-1  SAMA Level Advisory

2. Click OK to proceed.

   The blank patrol order appears, similar to the following figure:
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 figure:*

---

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 figure:*

---
5. Select the \{Owner’s status\} from the available options, as shown in the following figure:

![Owner’s Status](image)

**Figure 3-5 Facility Owner’s Status**

**NOTE:** Refer to [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 figure:*

   ![Calendar](image)

   **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 figure:*

   ![Accounting Codes](image)
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:

   ![Figure 3-8 Patrol Request Submission Message](image)

10. Click OK.

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

   ![Select Operator Button](image)

3. Click the Select Operator button.
   
   The Select Operator screen appears, similar to the following figure:

![Select Operator Screen](image)
4. 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 figure:

![Select Operator Screen](image)

**Figure 3-11 Select Operator Screen**

5. 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 figure:*

![Available Operators List](image)

**Figure 3-12 Available Operators List**

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

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

![Operator Picklist](image)

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

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

![Selected Operator](image)

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 figure:

   ![Open Patrol Order Request Form](image)

   **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:

   ![Open Patrol Request Submission Message](image)

   **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:

   ![Open Order Request on Calendar](image)

   **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 figure:

   ![Figure 3-19 Patrol Order Details](image)

2. Click Approve Request.

   A confirmation appears, similar to the following figure:

   ![Figure 3-20 Patrol Request Approval Message](image)

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 figure:*

   ![Figure 3-21 Reason for Action Window](image)

3. Enter the \{reason\}, and then click **Submit**.
   
   *A confirmation appears, similar to the following figure:*

   ![Figure 3-22 Patrol Order Request Cancellation Message](image)

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 figure:*
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:

   ![Figure 3-24 Patrol Order Re-Activation Message](image)

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 \textit{patrol order request coded in blue} on the calendar. 
   \textit{The details of the request are shown, similar to Figure 3-19.}

2. Click \textbf{Edit}, and then edit the necessary information.

\textbf{NOTE:} Not all fields can be edited. Facility and Owner/Operator information cannot be changed.

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

\textbf{3.3.5 Deleting a Request}

Perform the following steps to delete a request.

\textbf{NOTE:} Only the creator of the patrol order request has the permission to delete it.

1. Select a \textit{patrol order request coded in blue} on the calendar. 
   \textit{The details of the request are shown, similar to Figure 3-19.}

2. Click \textbf{Delete Request}. 
   A confirmation appears, similar to the following figure:

   \begin{figure}
   \centering
   \includegraphics[width=0.4\textwidth]{figure_3-25}
   \caption{Patrol Order Request Deletion Message}
   \end{figure}

3. Click \textbf{OK}. 
   \textit{The patrol order request is removed from the calendar.}

\textbf{3.3.6 Claiming or Deleting Open Patrol Order Requests}

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

![Figure 3-28 Crew Buttons on Patrol Order](image)

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 \textit{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:

![Figure 3-29 Search for Crew Window](image)

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

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

The search results appear, similar to the following figure:
3. Select the appropriate {crew member}, and then click Select.

   A confirmation appears, similar to the following figure:

   ![Figure 3-30 Crew Search Results]

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 figure:

   ![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 figure:*

   ![Crew History List](image)

   **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 figure:*

![Applied Crew Members](image)

**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:*

   ![Figure 3-35 Crew Member Update Window](image)

2. Update the member’s information as appropriate, and then click **Save**.  
   
   *A confirmation appears, similar to the following figure:*

   ![Figure 3-36 Crew Member Updated Message](image)

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:*

   ![Figure 3-36 Crew Member Updated Message](image)
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 **Apply as Crew** on the bottom right of the patrol order, similar to **Figure 3-28**.

   A confirmation appears, similar to the following figure:

   ![Applied Crew Member Denied Message](image)

   **Figure 3-37** Applied Crew Member Denied 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:

   ![Crew Member Removal Message](image)

   **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:

   ![Override Crew Button on Patrol Order](image)

   **Figure 3-40 Override Crew Button on Patrol Order**
The Confirm Crew Override dialog box appears, similar to the following figure:

![Confirm Crew Override Dialog Box](image)

**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:

![Crew Requirement Overridden](image)

**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 figure:*
Figure 3-43  Patrol Order to Be Completed After Mission

**NOTE:** Click the **Save** button saves the user work and allows him/her to come back to it later without losing the work. Click **Close (Without Saving)** to erase any work the user has done since the last save. Click **Cancel Order** to yield 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 figure:
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:*

   ![Receipt Has Been Uploaded Message](image)

   **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 figure:

![Receipts to Submit](image)

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 figure:

![Receipt Count on Patrol Order](image)

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:

   ![Figure 3-48 Receipt Window With Option to Delete](image)

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

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

   ![Message from webpage](image)

   **Figure 3-50 Receipt Deletion Confirmation**

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

   **Click OK to remove 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 (refer to 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:

   ![Receipt Window With Option to Undo Delete](image)

   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 figure:

   ![Blank Itinerary Figure](image)

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 (**refer to** 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:*

   ![Patrol Order has been saved.](image)

   **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:

![Signature Fields](image)

**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 (refer to **Figure 3-54**).
   
   A signature dialog box appears, similar to the following figure:

   ![Signature Dialog Box](image)

   **Figure 3-55 Signature Dialog Box**

2. Enter the `{password}`, and then click **Submit**.
   
   A confirmation appears, similar to the following figure:

   ![Order Signed](image)

   **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:*

   ![Message from webpage]

   **Patrol Order has been Completed. OIA will be notified.**

   ![OK button]

   **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:

   ![Message from webpage]

   **Figure 3-58 Missing Signature Warning**

   *Click **OK** to return 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:

   ![Patrol Order Submitted and Sent to FINCEN](image)

   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:

![Order History Link on Patrol Order](image)

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:
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 figure:

![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

Click the SAMA Distribution tab to yield a screen similar to the following figure:

![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:

   ![Budget Update Message](image)

   **Figure 4-3 Budget Update Message**

3. Click **OK**.

**4.3 District SAMA Forecast**

Click the **District SAMA Forecast** tab to yield a screen similar to the following figure:

![District SAMA Forecast Screen](image)

**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

Click the Add Non-Auxiliarist tab to yield a screen similar to the following figure:

![Add Non-Auxiliarist Screen](image)

**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}, {e-mail 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:

![User has been added to AOM](image)

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

4.5 Fuel Distribution

Click the Fuel Distribution tab to yield a screen with fields similar to the following figure:
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

Click the District Fuel Forecast tab to yield a screen similar to the following figure:
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 figure:

![Figure 5-1 National Summary Page](image)

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 figure:

![Figure 5-2 National and District Budgets Page](image)
5.2.1 Editing a Budget
To edit a budget, select the \{dollar amounts\}, edit the information, and then click \textit{Save}.

\textit{A confirmation appears, similar to Figure 4-3.}

Click \textit{OK}.

5.3 SAMA Boat Rates
Click the \textbf{SAMA Boat Rates} tab to yield a screen similar to the following figure:

![Figure 5-3 SAMA Boat Rates](image)

5.3.1 Editing SAMA Boat Rates
Perform the following steps to edit the SAMA boat rates:

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

\textit{The specific details of the selected type appear, similar to the following figure:}

![Figure 5-4 SAMA Boat Rate Details](image)

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

\textit{A confirmation appears, similar to the following figure:}
3. Click OK.

5.4 SAMA Air Rates

Click the SAMA Air Rates tab to yield a screen similar to the following figure:

![Figure 5-6 SAMA Air Rates](image)

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 figure:

   ![Figure 5-7 SAMA Air Rate Details](image)

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

   A confirmation appears, similar to the following figure:
3. Click OK.

5.5 Type 9 Air Rates

Click the Type 9 Air Rates tab to yield a screen similar to the following figure:

![Type 9 Air Rates]

**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 figure:*

![Current Resource Values]

**Figure 5-10 Current Resource Values**

2. Edit the desired `{value}`, and then click **Save**
A confirmation appears, similar to the following figure:

![Message from webpage](image1)

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:

![Message from webpage](image2)

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:
2. Click OK.

5.6 SAMA Boat Exceptions

Click the SAMA Boat Exceptions tab to yield a screen similar to the following figure:

![SAMA Boat Exceptions](image)

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:
5.6.2 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:

   ![Figure 5-15 Updated 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:

   ![Figure 5-16 Added SAMA Exception Message]

2. Click **OK**.
2. Click OK.

Figure 5-17 Removed SAMA Boat Exception Message