



AUXDATA OM Overview Guide

Version 0.2

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(EDITED FOR OWNER/OPERATOR USE)

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1. PREFACE

1.1 Purpose

This document has been developed to provide United States Coast Guard (USCG) Auxiliary users with instructions and information necessary to use Order Management (OM). OM 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 OM.

1.1.1 Purpose of OM

For Auxiliarists and crew, who provide support to the USCG, OM 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 level. The OM user base is estimated at 5,500 users with approximately 25 concurrent users at any one time.

The purpose of OM is to:

- Automate and streamline the entire Auxiliary patrol order/claims process, from the time an Auxiliarist requests orders until they receive their reimbursement. OM 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:

- **Facility Owner/Operator**
- OM 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.

1.4 Security and Privacy

Increased security has been added to the OM module. 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 prevents users from performing any actions in OM beyond the scope of their level.

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

2. OM FUNCTIONALITY

OM has its own built-in navigational tools, which include various menus and return links. The menu items and the return links (when available) may be used at any time to navigate while logged on 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.

2.1 Logging into OM

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

1. Use the following link to access OM: <http://ordermgmt-train.uscg.gov/>.

The unauthorized access warning appears similar to the following:

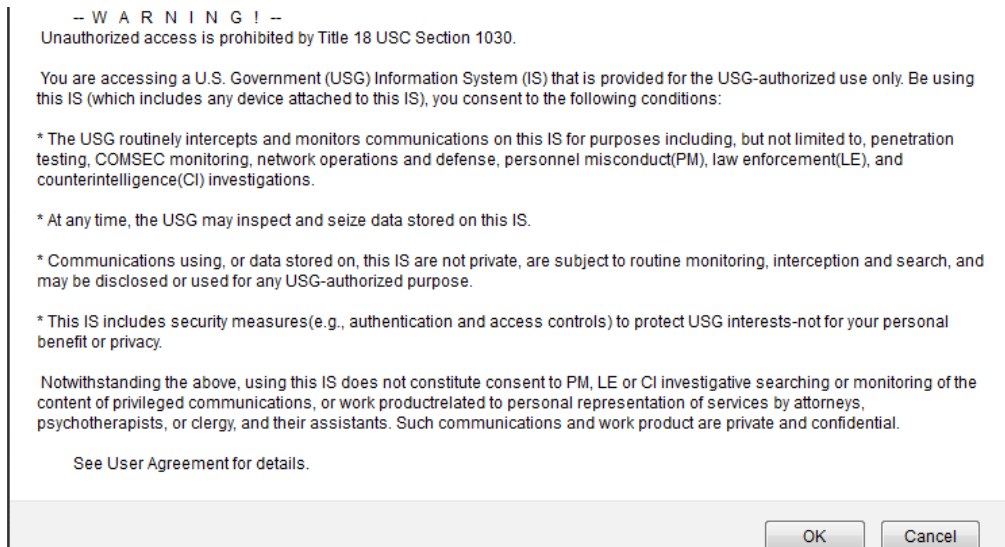


Figure 2-1 Unauthorized Access Warning

2. Click **OK**.

The access to Order Management screen appears similar to the following:

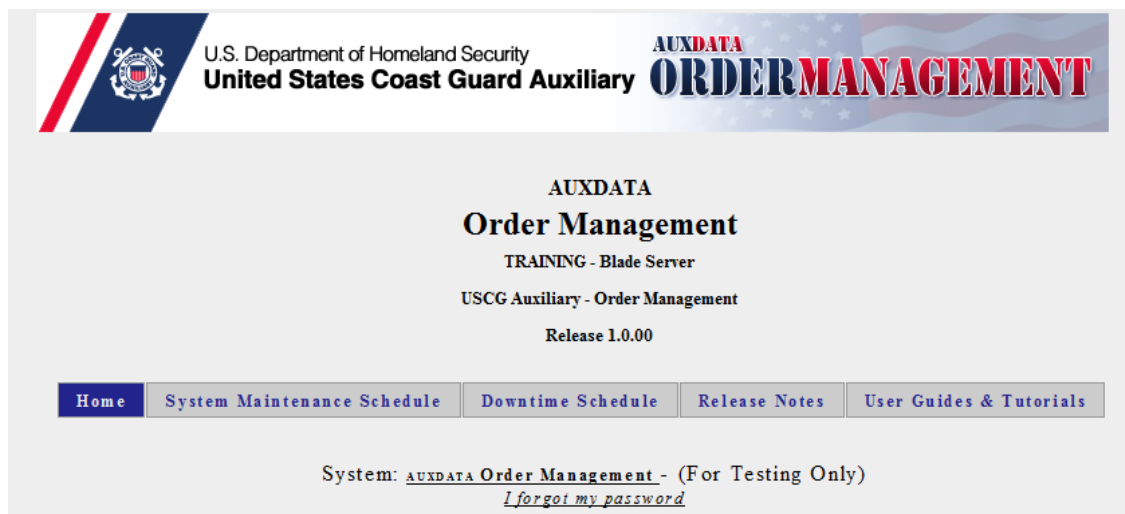


Figure 2-2 Access to Order Management

3. Click the **AUXDATA Order Management – (For Testing Only)** access link

NOTE: *This link will change when OM goes to production.*

The login screen appears similar to the following:

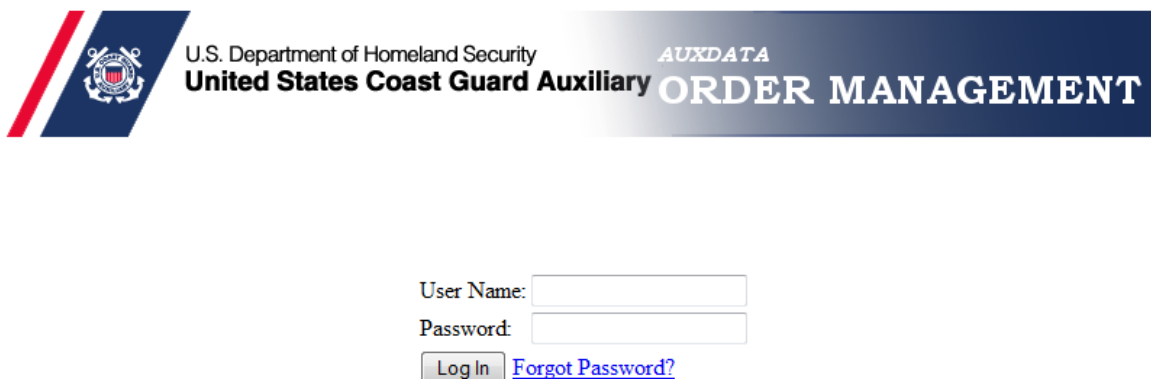


Figure 2-3 OM Login Screen

4. Enter the following information, and then click **Log In**:

- In the **User Name** field, enter a {username}
- In the **Password** field, enter a {password}.

NOTE: If user name and/or password is forgotten, see [Section 5, Password Reset](#).

5. If a user has multiple available locations, the location selection screen appears similar to [Figure 2-4](#). Users without multiple locations will go directly to the OM Main Menu as shown in [Figure 2-5](#).

Figure 2-4 Location Selection Screen

4. Users with multiple locations select the desired {location}, and then click the **SELECT** button.

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

Figure 2-5 OM Main Menu

2.2 Main Menu Navigational Tools

Click any of the OM 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 through those respective tabs on the **Home** page. The calendar allows users to filter by Patrol Requests, Patrol Orders, and Cancelled Patrol Orders. The calendar is color-coded as shown in [Figure 2-5](#).

2.2.2 Reports

The **Reports** button allows users to view Patrol Status and Member Activity reports. Additionally, the Order Issuing Authorities (OIAs) may view reports based on their location. District level officers may view reports at the district level and below. The National level officers may view all reports.

2.2.3 Search

The **Search** button allows users to search for a user by member number, member name, member's electronic mail (e-mail) address, facility registration, member qualifications, and location.

2.2.3.1 User Admin Permissions

The User Admin can add or delete specific permissions for individual users. Clicking on an existing user will show the user's current permissions, similar to the following:

The screenshot shows a web interface for assigning permissions. At the top, there are four radio buttons for user roles: DIRAUX, OIA, Owner / Operator (which is selected), and ORDER MGMT USER. Below these are two columns of checkboxes representing various permissions. The permissions are as follows:

Permission	Checked
Request Patrol Orders	Yes
Request Open Orders	No
Request Orders For Others	No
Approve/Submit Patrol Orders	No
Search Members	Yes
Search Facilities	Yes
Search Orders	Yes
Complete Others 5132/7030	No
Create User/Owners	No
Create OIA	No
Create DIRAUX	No
Add/Update District Accounting Codes	No
Allocate District Funds	No
Run Location Reports	No
Run District Reports	No
Manage User Permissions	No
Manage Patrol Area	No
Upload Receipt Photos	Yes
Upload Facility Photo	Yes

Figure 2-8 Assigned Permissions Screen

User roles and user permissions may be edited using the radio buttons and check boxes as shown in Figure 2-8.

2.3 Patrol Orders

The following subsections describe the procedures of the various aspects of Patrol Orders.

2.3.1 Request Orders

Perform the following steps to create a new Patrol Order:

NOTE: Location cannot be at the district level.

1. Click the **Request Orders** button as shown in [Figure 2-5](#).

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 :

☒ Owner is Operator
☐ Owner On Board
☐ Owner Not On Board

Reimburse:

Date: **Sub-Unit:** **Patrol Type:**

Patrol Time: **Patrol Area:**

Accounting Code

Fuel

Subsistence

SAMA - Boat

SAMA - Air

Trailing

Comments:

Figure 2-13 Blank Patrol Order

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

The Patrol Order will populate with information about the selected facility 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:**

Facility Name :

Facility ID :

Call Sign :

Facility Type :

Inspection Date :

Crew Required :

☒ Owner is Operator
☐ Owner On Board
☐ Owner Not On Board

Date: **Sub-Unit:** **Patrol Type:**

Patrol Time: **Patrol Area:**

Accounting Code

Fuel

Subsistence

SAMA - Boat

Trailing

Comments:

Figure 2-14 Facility Information

3. 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 2-15 Facility Owner's Status

NOTE: See [Section 2.3.1.1, Request Order When Owner is not Operator](#) for further instructions if status is other than Owner is Operator.

4. Click inside the **Date** field.

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

« 2012 Dec »						
M	T	W	T	F	S	S
26	27	28	29	30	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	5	6

Figure 2-16 Calendar

5. Select the desired {date}.

The date appears in the appropriate field. Accounting codes populate similar to the followin.:

Requesting Patrol Orders

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Aux Order Number

Facility : [dropdown] Owner: [dropdown] ☒ Owner is Operator
☐ Owner On Board
☐ Owner Not On Board

Facility Name : [text]
Facility ID : [text]
Call Sign : [text]
Facility Type : E
Inspection Date : APR-12-2012
Crew Required : 3

Date: 2012-12-25 Sub-Unit: [dropdown] Patrol Type: [dropdown]
Patrol Time: « 2012 Dec » M T W T F S S
Patrol Area: [dropdown]

Fuel 26 27 28 29 30 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
Subsisten 24 25 26 27 28 29 30
SAMA - B 31 1 2 3 4 5 6

Trailing 0

Accounting Code
2/4 301 114 30 0 30 73500 2637
2/K 301 299 11 0 AX 73500 2533
2/4 301 114 30 0 SM 73500 257P
2/4 301 114 30 0 30 73500 2634

Comments: [text area]

Add patrol comments here

Submit Request Close (Without Saving)

Figure 2-17 Accounting Codes

6. Select the following information on the Patrol Order form:

- At the **Sub-Unit** picklist, select a {Sub-Unit}, if any are listed
- 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}.

NOTE: Completing the remaining fields is not required when submitting a request.

7. Click **Submit Request** if information is complete and accurate. Otherwise, click **Close (Without Saving)** to clear the form.

The following message appears similar to the following:

Patrol Request has been Submitted for approval.

OK

Figure 2-18 Patrol Request Submission Message

8. Click **OK**.

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

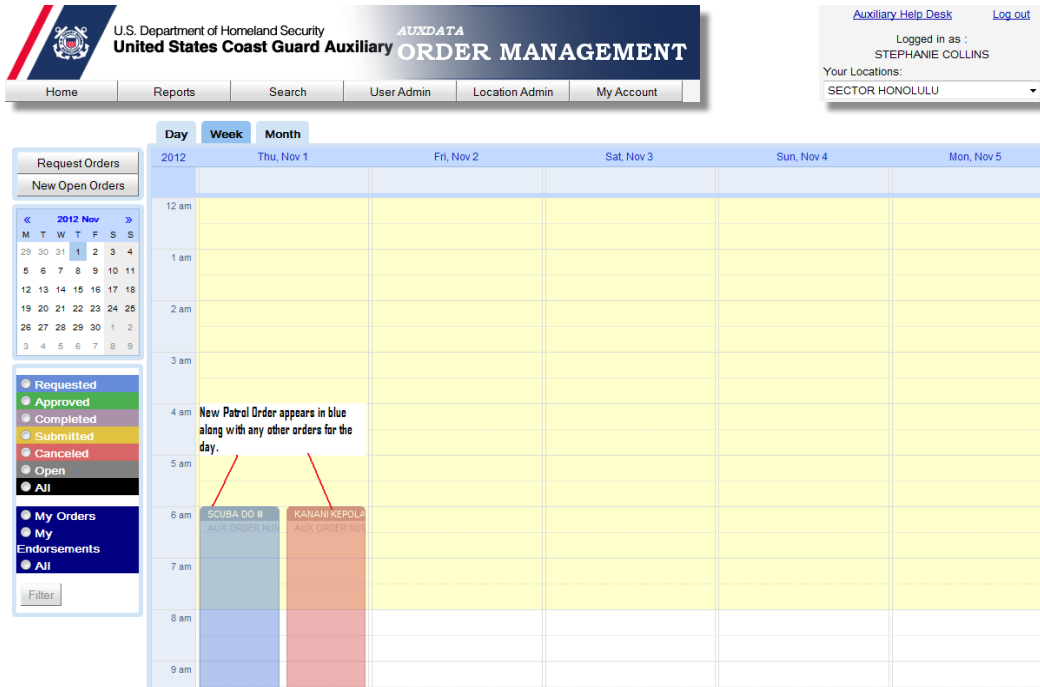


Figure 2-19 Status of Patrol Requests for a Specific Date

2.3.1.1 Request Order When Owner Is Not Operator

Complete these additional steps when Owner is not the Operator:

1. Complete [Steps 1-3](#) in [Section 2.3.1, Request Orders](#).
2. If Owner is not Operator, the **Select Operator** button appears.
3. Click the **Select Operator** button.

The select operator screen appears similar to the following:

Search For : Operators

By: ☐ Employee ID ☐ Name

Search

EMP ID Name

For Name Search, do NOT enter both first and last name – if you do, search will return no results

Select Close

Figure 2-20 Select Operator

4. To search for Operators, select either **Employee ID** or **Name** option as a search criteria, enter {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:

EMP ID	Name	Qualifications
1100110	JAMES H. COLLINS	BCCOX, IT, VE, APC
1100111	JAMES H. COLLINS	AV, BCCOX, IT, QE, VE, WS, APC
1100112	JAMES H. COLLINS	AV, BCCOX, IT, PWO, APC

Figure 2-21 Available operator list

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

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

Requesting Patrol Orders

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Aux Order Number

Facility :
Facility Name :
Facility ID :
Call Sign :
Facility Type :
Inspection Date : APR-12-2012
Crew Required : 3

Date: 2012-12-25 Sub-Unit: Patrol Type:
Patrol Time: Patrol Area:

Fuel: 2/4 301 114 30 0 30 73500 2637
Subsistence: 2/K 301 299 11 0 AX 73500 2533
SAMA - Boat: 2/4 301 114 30 0 SM 73500 257P
Trailing: 2/4 301 114 30 0 30 73500 2634

Comments:

Submit Request Close (Without Saving)

Figure 2-22 Owner Is Not Operator Screen

NOTE: The remaining steps are in development.

2.3.2 New Open Orders

To create a new **Open Order**, perform the following steps.

1. Click on **New Open Orders** button as shown in [Figure 2-5](#).

An *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:

Submit Request Close (Without Saving)

Figure 2-23 Open Order Request Form

2. Click inside the **Date** field.

A calendar appears showing current date, similar to [Figure 2-16](#).

3. Select the desired {date and time}.

4. Select the following information:

- At the **Sub-Unit** picklist, select a {Sub-Unit}, if any are listed
- 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}.

5. Click **Submit Request** if information is complete and accurate. Otherwise, click **Close (Without Saving)** to clear the form.

The following message appears similar to the following:

Open Patrol Request has been Submitted.

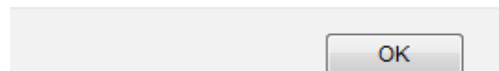


Figure 2-24 Open Patrol Request Submission Message

9. Click **OK**.

The new request will appear black for the selected date on the calendar similar the following:

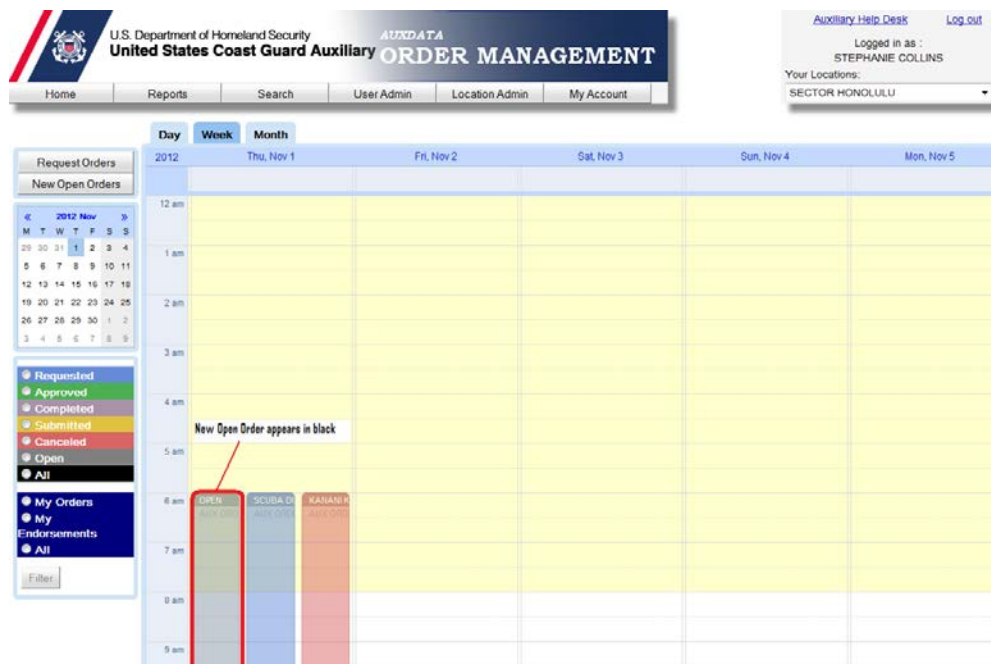


Figure 2-25 Open Order Request Calendar Submission

2.3.3 Approving, Denying, Editing, and Deleting Requests

OIAs have the authority to “Approve”, “Deny”, and “Edit” requests. **Only the creator of a Patrol Order has the permission to “Delete” a request.** The subsections below demonstrate how these actions are performed.

2.3.3.4 Deleting a Request

Perform the following steps to “Delete” a self-created 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 : 1001016

Dept of Homeland Security United States Coast Guard CG-5132		Coast Guard Auxiliary Patrol Order		Aux Order Number 1001016
Facility :	Owner:	Operator:		
Facility Name : KAHU KAI	1206737	1172913		
Facility ID : AZ3266AD	ISRAEL Y BENDAVID	GARY A TAYLOR		
Call Sign : 191358	17031 PANORAMA DR	7012 N CLEAR SKY COURT		
Facility Type : B	SPRING VALLEY AZ 86333-4129	PRESCOTT VALLEY AZ 86315-9035		
Inspection Date : MAY-01-2012	Reimburse: OWNER			
Crew Required : 2				
Date: 2013-01-26	Sub-Unit: SSD Inland AZ Lakes	Patrol Type: 01A: MARITIME OBSERVATION (MOM)		
Patrol Time: MIDDAY	Patrol Area: Bartlett Lake			
Accounting Code				
Fuel	2/L 301 111 30 0 64 73500 2637	Comments: Test in AOM Radio Guard by Prescott Mobile 1		
Subsistence	2/K 301 299 11 0 AX 73500 1180			
SAMA - Boat	2/L 301 111 30 0 61 73500 257P			
Trailer	2/L 301 111 30 0 64 73500 2634			
<input type="button" value="Approve Request"/> <input type="button" value="Delete Request"/> <input type="button" value="Deny Request"/> <input type="button" value="Close (Without Saving)"/> <input type="button" value="Edit"/>				

Figure 2-26 Patrol Order Details

2. Click **Delete Request**.

The “Patrol Order has been Deleted” message appears similar to the following:

Patrol Order has been Deleted.

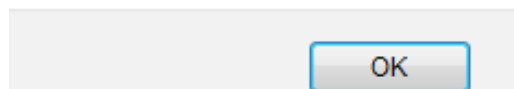


Figure 2-28 Patrol Order has been Deleted Message

3. Click **OK**.

The Patrol Order will be removed from the calendar.

2.3.4 Completing a Patrol Order

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 kilobyte (KB). The resolution should be as close to 600 X 600 as possible.

To complete a Patrol Order, perform the following steps.

1. Select the appropriate {*approved Patrol Order color-coded in green*}, similar to [Figure 2-19](#).

The Patrol Order appears similar to the following:

Patrol Order : 1000273

Dept of Homeland Security
United States Coast Guard
CG-5132

Coast Guard Auxiliary Patrol Order

Aux Order Number :1000273
Document ID :

Facility :
Facility Name :
Facility ID :
Call Sign :
Facility Type :
Inspection Date : APR-21-2012
Crew Required : 1

Owner:
Operator:

Date: **Sub-Unit:** **Patrol Type:**

Patrol Time: **Patrol Area:**

Est (\$)	Accounting Code	Comments:
<input type="checkbox"/> Fuel	<input type="text" value="2/4 301 114 30 0 30 73500 2632"/>	<div style="border: 1px solid black; height: 100px;"></div>
<input type="checkbox"/> Subsistenc	<input type="text" value="2/K 301 299 11 0 AX 73500 2533"/>	
<input type="checkbox"/> Trailing	<input type="text" value="2/4 301 114 30 0 30 73500 2634"/>	

Itinerary	Start Date	Start Time	End Date	End Time	Location	Mission

Facility Data

Gallons of Fuel:
 Engine Hours:

Automobile Data

Gallons of Fuel:
 Mileage:

Expenses

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

Reason For Other

[Receipts](#)

[Add Itinerary](#) **AuxData Unit :**

EMP ID	Name	Position	Breakfast	Lunch	Dinner	Mid
<input type="text"/>	<input type="text"/>	LEAD				

Add Crew

Crew History

Applied Crew

Apply As Crew

Government Provided

☐ Breakfast ☐ Lunch ☐ Dinner ☐ Mid-Rations

Signature of Claimant:

Signature of Operator:

Signature of OIA:

[Order History](#)

Figure 2-29 Patrol Order to be Completed after Mission

2. Enter information within the **Facility Data** and/or **Automobile Data** sections on the right side of the form, as appropriate.
3. Complete the **Expenses** section of the form as appropriate.
4. To upload receipts, click the **Receipts** button.

Upload instructions appear similar to the following:

Receipts For order : 1000162

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. Should be as close to 600 x 600 resolution as possible.

File Name	Uploaded By	Date Uploaded
0 Results		

Figure 2-30 Upload Receipts Instructions

- A Java Script message appears similar to the following:.*



- The Search for Crew screen appears similar to the following:*



12. To search for Crew, select either the **Employee ID** or **Name** option as a search criteria, enter {search information}, and then click **Search**.

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

Results appear in the available Crew list similar to the following:

Search for crew to add

Search For : Crew

By: ☐ Employee ID ☒ Name

Collins Search

EMP ID	Name	Qualifications
11001101	JAMES COLLINS	BCCOX, IT, VE, APC
11001102	JIMMY COLLINS	BCCREW, APC
11001103	JEFF COLLINS	VE
11001104	JIMMY COLLINS	
11001105	JAMES COLLINS	AV, BCCOX, IT, QE, VE, WS, APC
11001106	JIMMY COLLINS	IT
11001107	JEFF COLLINS	IT
11001108	JIMMY COLLINS	BCCREW, IT

Select Close

Figure 2-33 Crew Picklist

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

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

The crew member appears similar to the following:

Adding Crew member to order

JAMES COLLINS

Position :

Meals :

☐ Breakfast ☐ Lunch ☐ Dinner ☐ Mid-Rations

Add Close

Figure 2-34 Adding Crew Member to Order

14. Select the {crewmember’s position} from the **Position** picklist, and then click **Add**.

The crew member to be added screen appears similar to the following:

Crew member has been added to the order

OK

Figure 2-35 Crew Member has been Added

15. Click **OK**.

16. Click **Add Itinerary** button.

The 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)

2012-12-24 H: M: 2012-12-24 H: M:

Mission Details

Location Assists Waters

SAR Details

Lives Saved Persons Assisted Property Value Case Number

Add Close

Figure 2-36 Blank Itinerary

17. 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** field, enter a {start time}

NOTE: For {start time} use a 4-digit 24 hour format.

- In the **Stop Time** field, enter a {stop time}

NOTE: For {stop time} use a 4-digit 24 hour format.

- Within Mission Details, enter a {location}
- Within Mission Details, select {Waters} from **Waters** picklist

NOTE 1: Assists are not required.

NOTE 2: Search and Rescue (SAR) Details are only required for SAR missions.

NOTE 3: Meals will populate according to time of mission. Select the {crew member} if updates are necessary.

18. If Patrol Order is complete, click **Save**.

NOTE: The Patrol Order is now ready for the Owner/Operator to sign as Claimant.

19. Click **Close (Without Saving)** to return to the Calendar.

5. PASSWORD RESET

When a new account is added to a location, the user will receive an automated e-mail message with their new user name. Upon receipt of that e-mail message, the user will use the **Password Reset** tool located on the OM module logon screen as shown in [Figure 2-1](#). The same procedure will be used for “forgotten” password. Perform the following steps to reset user password:

1. Click the **I forgot my password** link.

The Password Reset screen will appear similar to the following:

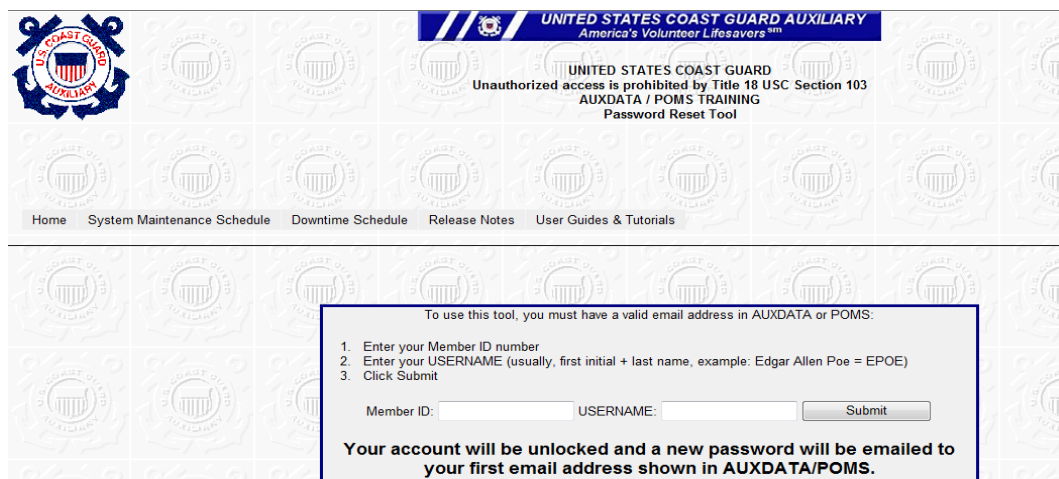


Figure 5-1 Password Reset Screen

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

- In the **Member ID** field, enter the {Member ID number}.
- In the **USERNAME** field, enter the {username}.

NOTE 1: An account will be locked after three failed logon attempts. The user should contact their OIA or **OSC-DG-AUXDATA Helpdesk** e-mail distribution group to have his/her account unlocked or wait 1 hour for the account to automatically unlock.

NOTE 2: User passwords must be changed every 45 days. After 45 days of inactivity, the user account will be locked. After 365 days of inactivity, the user account will be dropped (expired).

NOTE 3: If a user's account is locked or expired, the user will be notified at logon with an alert message. If this occurs, the user should contact their OIA or **OSC-DG-AUXDATA Helpdesk** for assistance.

NOTE 4: The user ID of a first-time user will be his/her first initial followed by his/her last name. For example, John Smith's user ID would be **jsmith**. The temporary password for a first-time user will be randomly generated and provided to the creator of the account. The system will prompt the user to change his/her password.