

ADHOC Report Requests


Introduction	This guide provides the procedures for requesting an ADHOC (created or done for a particular purpose as necessary) report out of Direct Access (DA).
Before You Begin	<p>You should contact CGBI first. Coast Guard Business Intelligence (CGBI) contains reports with specific data transferred from DA that might provide the information you are requesting from PPC in the form of an ADHOC. A full list of the available data and reports can be found on CGBI Support/Training and Outreach Site General Job Aids link.</p> <p>If what you are looking for is NOT available through CGBI, please contact cgbi.support@uscg.mil with the information you are requesting. If CGBI is unable to locate the data you are requesting, then you should submit an ADHOC request to PPC. Ensure the Trouble Ticket indicates that you attempted to locate the data through CGBI.</p>
Information	E-mail is also available for an ADHOC request to PPC Customer Care directly at: ppc-dg-customer@uscg.mil .
Procedures	See below.

Step	Action
1	<p>Ensure you have exhausted researching data with the CGBI staff before you go to the PPC Customer Care web page at https://cg.portal.uscg.mil/units/ppc/SitePages/Contact%20Us.aspx.</p> <p>Review the instructions on the website for saving the Trouble Ticket Template to your computer. IT IS VERY IMPORTANT THAT YOU FOLLOW THESE INSTRUCTIONS.</p> <div> <p>Procedure for Submitting PPC Customer Care Trouble Tickets</p> <p>from us, you are invited to fill out our customer service survey. Please click this link to complete the PPC Customer Satisfaction Survey</p> <p>Attention, Very Important – Please turn off the digital signature in MS Outlook before sending the e-mail message. The tracking system is not accepting digitally signed e-mails at this time.</p> <p>We have created a template for submitting trouble tickets to PPC via e-mail. It works like this:</p> <p>1. Right-mouse click on the link to the MS word template at https://cg.portal.uscg.mil/units/ppc/Documents/PPC_Customer_Care_Trouble_Ticket_Form.docm and select "save file as..."</p> <p>https://cg.portal.uscg.mil/units/ppc/Documents/PPC_Customer_Care_Trouble_Ticket_Form.docm</p> </div>

Continued on next page

ADHOC Report Requests, Continued

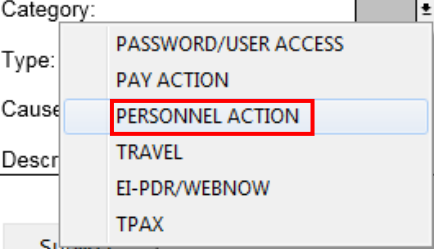
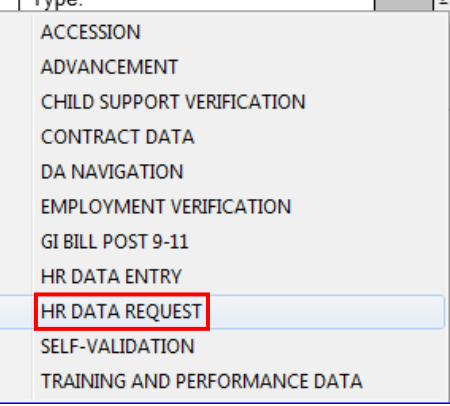
Procedures,
continued

Step	Action
2	<p>Click on the Trouble Ticket Form link.</p> <p> Trouble-Ticket Form (please review the instructions, below, if you are not familiar with the MS Word Template Trouble Ticket Process):</p>
3	<p>Fill in all appropriate information into the Contact Information and the Member/Employee Information sections.</p> <p>Contact Information - Who is submitting this ticket?</p> <p>POC Employee ID: 8888888</p> <p>POC Email: jim.t.smith@uscg.mil</p> <p>POC First Name: Jim</p> <p>POC Last Name: Smith</p> <p>POC Title, Rate or Rank: YNC</p> <p>POC Daytime Phone Number: 555-1212 (include area code & ext)</p> <p>Member/Employee Information - Who is this ticket for?</p> <p>Member/Employee ID: 5555555</p> <p>Member/Employee First Name: Jane</p> <p>Member/Employee Last Name: Doe</p>
4	<p>Select the I am a Command, SPO or ADMIN support user option from the Select User Role drop-down.</p> <p>Problem/Issue Information – If Travel related issue, include Travel Order Number (TONO) and travel dates in the description.</p> <p>User Role for this issue: Select User Role ▼</p> <p>Select User Role</p> <p>I am the Member/User (self-service issue)</p> <p>I am a Command, SPO or ADMIN support user</p> <p>I am a PPC staff member</p> <p>Description of Problem/Request: </p>

Continued on next page

ADHOC Report Requests, Continued

Procedures, continued

Step	Action
5	<p>Select PERSONNEL ACTION from the Category drop-down.</p> <p>Problem/Issue Information — If Travel related issue, include Travel Order Number (TONO) and travel dates in the description.</p> <p>User Role for this issue: I am a Command, SPO or ADMIN support user</p> <p>Category: </p>
6	<p>Select the HR DATA REQUEST option from the Type drop-down.</p> <p>Problem/Issue Information — If Travel related issue, include Travel Order Number (TONO) and travel dates in the description.</p> <p>User Role for this issue: I am a Command, SPO or ADMIN support user</p> <p>Category: PERSONNEL ACTION</p> <p>Type: </p>

Continued on next page

ADHOC Report Requests, Continued

Procedures, continued

Step	Action
7	<p>Select the ADHOC REPORT option in the Cause drop-down.</p> <div data-bbox="327 483 1254 1234"> <p>Problem/Issue Information – If Travel related issue, include Travel Order Number (TONO) and travel dates in the description.</p> <p>User Role for this issue: <input type="text" value="I am a Command, SPO or ADMIN support user"/></p> <p>Category: <input type="text" value="PERSON"/></p> <p>Type: <input type="text" value="HR DATA"/></p> <p>Cause: <input type="text" value="ADHOC REPORT"/></p> <p>Description of Problem/Request: <input type="text"/></p> </div>

Continued on next page

ADHOC Report Requests, Continued

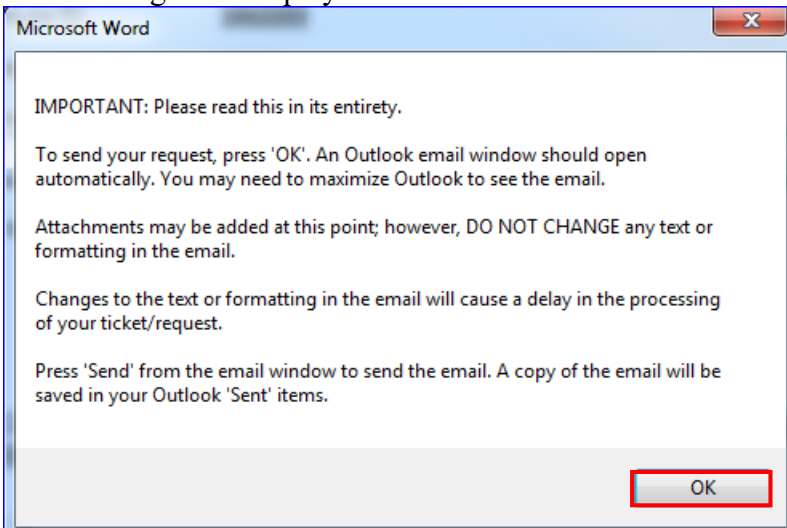
Procedures, continued

Step	Action
7	<p>Enter a complete description of the query in the Description of Problem/Request: block of the form. Click Submit.</p> <p>NOTE: Ensure the Trouble Ticket indicates that you attempted to locate the data through CGBL.</p> <p>Problem/Issue Information – If Travel related issue, include Travel Order Number (TONO) and travel dates in the description.</p> <p>User Role for this issue: <input type="text" value="I am a Command, SPO or ADMIN support user"/></p> <p>Category: <input type="text" value="PERSONNEL ACTION"/></p> <p>Type: <input type="text" value="HR DATA REQUEST"/></p> <p>Cause: <input type="text" value="ADHOC REPORT"/></p> <p>Description of Problem/Request: Please provide a list of all personnel attached to the USCGC Example (WLB-X12), OPFAC 18-12345, from 1 May 2018 through 30 April 2019. We need to determine eligibility for a Unit Commendation. Provide results in MS Excel format with the following columns:</p> <p>Name (last, first, mi) <input type="text"/></p> <p>Rate/Rank <input type="text"/></p> <p>Current Unit (ID and Description) <input type="text"/></p> <p>Report date (on USCGC Example) <input type="text"/></p> <p>Depart date (if departed USCGC Example) <input type="text"/></p> <p>Point of contact: YNC Jim Smith, (757) 555-1212.</p> <p><input type="button" value="Submit"/></p>

Continued on next page

ADHOC Report Requests, Continued

Procedures, continued

Step	Action
8	<p>This Message will display. Click OK.</p> 
9	<p>An email message will display. Attachments may be added. Do not make any other changes to the message. Turn off the digital signature before sending. Click Send.</p> 