

ADHOC Report Requests

Introduction This guide provides the procedures for requesting an ADHOC for data that is unavailable as an existing Direct Access (DA) report (see Important Information below).

NOTE: If the data is not currently captured in DA, PPC will not be able to generate an ADHOC.

Before You Begin **Contact CGBI first.** Coast Guard Business Intelligence (CGBI) contains reports with specific data transferred from various applications across the Coast Guard, including DA that might provide the information you are requesting 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](#).

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 need, then submit an ADHOC request to PPC. Ensure the Trouble Ticket indicates that you attempted to locate the data through CGBI.**

Important Information

- Before beginning this request process, please consult the **Reports & Queries** section of our [Direct Access User Guides page](#) to confirm there is not already a process to access the needed information.
- The **Prior Unit History Report** and **Unit Roster** can both be run at the unit level.

KNOWN ISSUE *NEW*

Currently and for the foreseeable future, the **Prior Unit History Report** is down in Direct Access. This Report runs to success but doesn't post. We've requested a CRQ to fix this but in the meantime, anyone needing a Prior Unit History Report run will need to submit a ticket for an ADHOC – for the ADHOC, the requestor **MUST** provide the date parameters (this report can **NOT** be future dated) and they **MUST** provide **ALL** DEPTIDs to be captured on the report.

Timing

- ADHOC requests are completed in the order they are received.
- Most requests will be completed within 15 business days of receipt but **may take longer depending on the type and size of the data being requested.**
- **If the request is time sensitive, justification MUST be provided.**

Continued on next page

ADHOC Report Requests, Continued

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 SharePoint page.</p> <div data-bbox="328 488 1366 808" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center;">Thank you for visiting the PPC Customer Care SharePoint Page!</p> <p style="text-align: center;">We are glad you are here and hope you find everything you need for solving your issues or answering your questions.</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="331 584 667 804" style="text-align: center;">  <p>Online Trouble Ticket Form</p> </div> <div data-bbox="683 584 1018 804" style="text-align: center;">  <p>HR/Pay Related Templates</p> </div> <div data-bbox="1034 584 1366 804" style="text-align: center;">  <p>Travel Related Templates</p> </div> </div> </div>
2	<p>Click on the Online Trouble Ticket button.</p> <div data-bbox="328 875 850 1182" style="border: 1px solid #ccc; padding: 10px;">  </div>
3	<p>Read the information provided before beginning. Complete the POC Employee ID and POC Email fields.</p> <div data-bbox="328 1279 1366 1928" style="border: 1px solid #ccc; padding: 10px;"> <div style="background-color: #2c4e64; color: white; padding: 10px; text-align: center;"> <h3>PPC Customer Care Online Trouble Ticket</h3> </div> <div style="border: 2px solid red; padding: 10px; margin: 10px 0;"> <p>Thank you for choosing the Online Trouble Ticket to submit your request! Please take a moment to review helpful information below to ensure we receive everything necessary to resolve your issue.</p> <ol style="list-style-type: none"> 1. This form contains dropdowns, please select appropriate list items for your trouble ticket. 2. Can Your Supervisor, PAO or AO Help? Many issues can be resolved at the unit or SPO level. Please check with your supervisor, SPO Payment Approving Official (PAO), or Travel Approving Official (AO) for travel related issues for assistance before submitting a trouble ticket. 3. A separate ticket is required for each issue or individual affected by an issue, please do not submit tickets with multiple members listed. Remember, some tickets require specific information and can be found on the PPC Customer Care Webpage using the E-Mail template tickets. </div> <p style="font-size: small; margin-bottom: 10px;">When you submit this form, the owner will see your name and email address.</p> <p><small>* Required</small></p> <p>CONTACT INFORMATION Point of Contact - Submitter Information</p> <p>POC Employee ID * <input style="width: 100%; border: 1px solid red;" type="text" value="1234567"/></p> <p>POC Email * <input style="width: 100%; border: 1px solid red;" type="text" value="Coast.E.Bear@uscg.mil"/></p> </div>

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ADHOC Report Requests, Continued

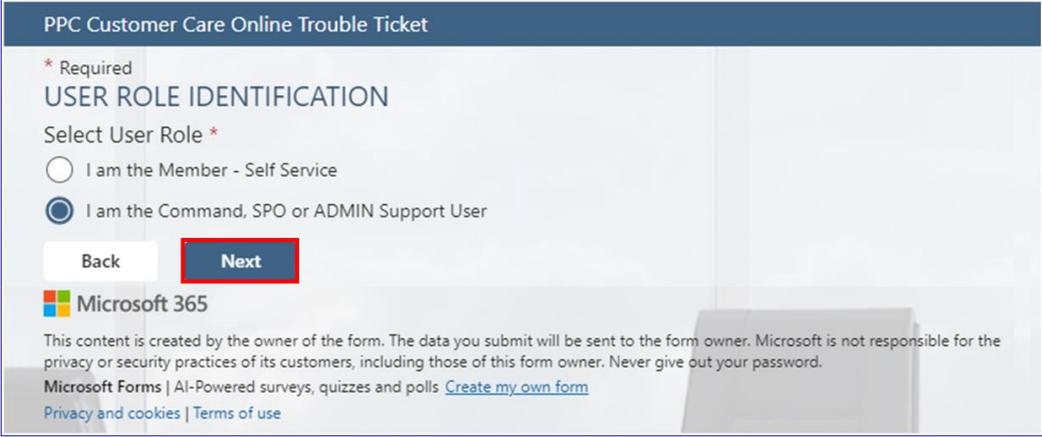
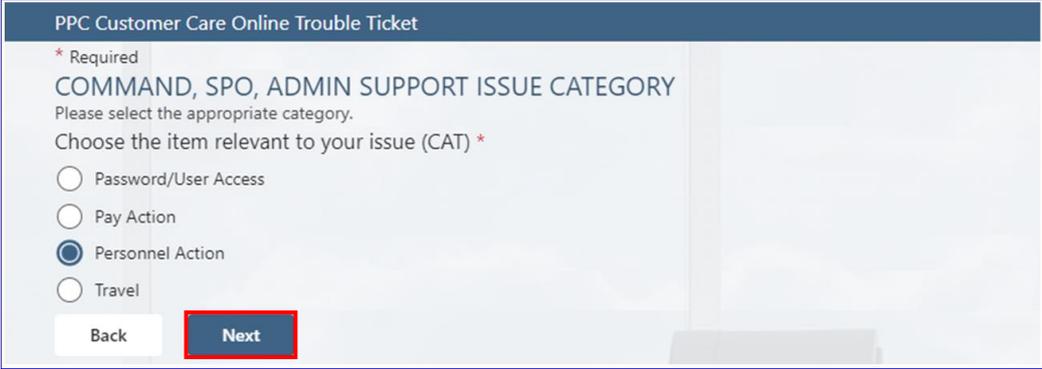
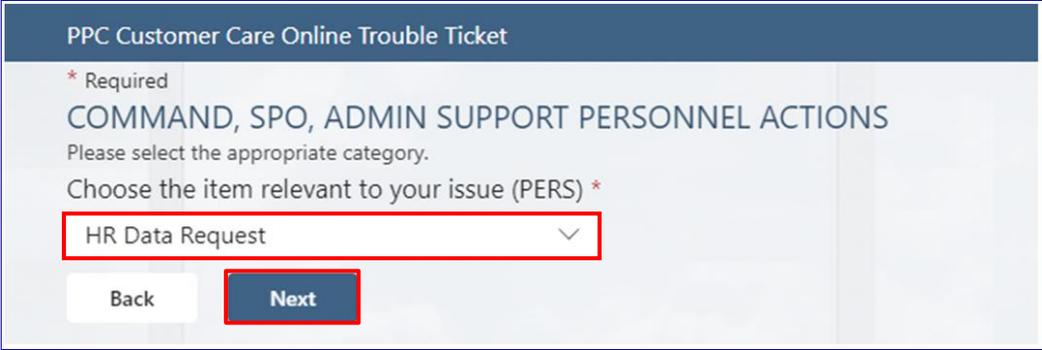
Procedures,
continued

Step	Action
4	<p>Complete the remaining POC information (all fields are required).</p> <div data-bbox="327 517 1369 1025" style="border: 1px solid #ccc; padding: 10px;"> <p>POC First Name *</p> <input data-bbox="352 562 1353 607" type="text" value="Coast"/> <p>POC Last Name *</p> <input data-bbox="352 651 1353 696" type="text" value="Bear"/> <p>POC Title, Rank or Rate *</p> <input data-bbox="352 741 1353 786" type="text" value="YNC"/> <p>POC Daytime Phone *</p> <input data-bbox="352 875 1353 920" type="text" value="111-222-3333"/> <p><input data-bbox="352 958 493 1010" type="button" value="Next"/></p> </div>
5	<p>Click Next.</p> <div data-bbox="327 1099 1369 1608" style="border: 1px solid #ccc; padding: 10px;"> <p>POC First Name *</p> <input data-bbox="352 1144 1353 1189" type="text" value="Coast"/> <p>POC Last Name *</p> <input data-bbox="352 1234 1353 1279" type="text" value="Bear"/> <p>POC Title, Rank or Rate *</p> <input data-bbox="352 1323 1353 1368" type="text" value="YNC"/> <p>POC Daytime Phone *</p> <input data-bbox="352 1458 1353 1503" type="text" value="111-222-3333"/> <p><input data-bbox="344 1541 496 1592" type="button" value="Next"/></p> </div>

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ADHOC Report Requests, Continued

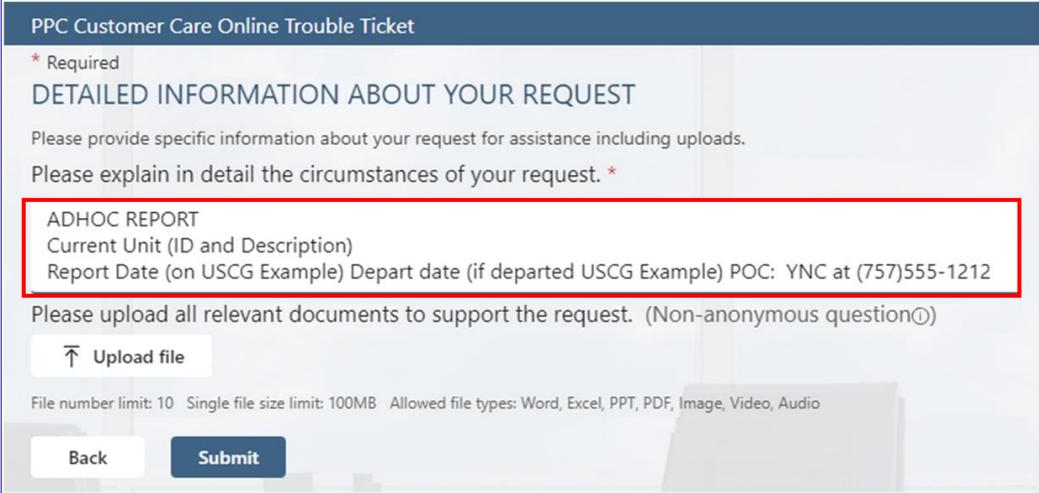
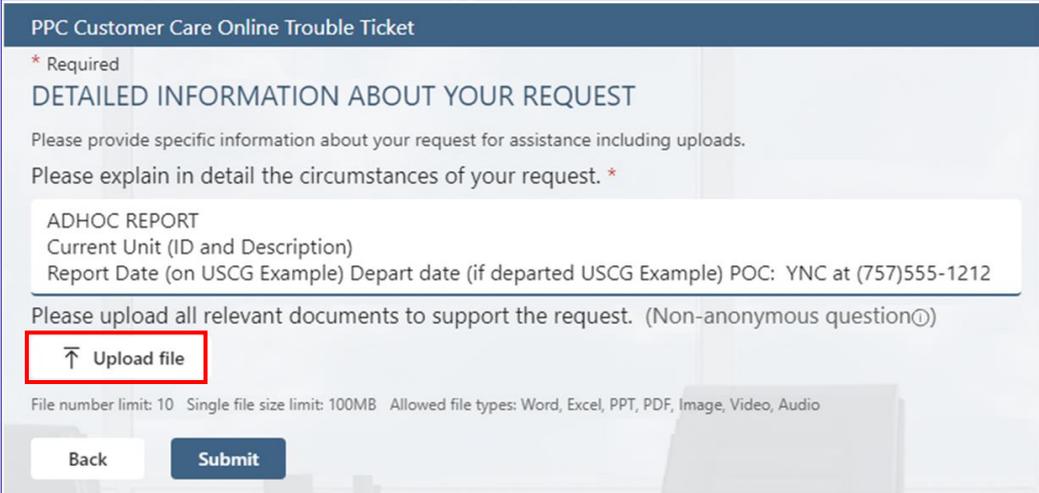
Procedures,
continued

Step	Action
6	<p>Click the I am the Command, SPO or ADMIN Support User radio button then click Next.</p>  <p>PPC Customer Care Online Trouble Ticket</p> <p>* Required</p> <p>USER ROLE IDENTIFICATION</p> <p>Select User Role *</p> <p><input type="radio"/> I am the Member - Self Service</p> <p><input checked="" type="radio"/> I am the Command, SPO or ADMIN Support User</p> <p>Back Next</p> <p>Microsoft 365</p> <p>This content is created by the owner of the form. The data you submit will be sent to the form owner. Microsoft is not responsible for the privacy or security practices of its customers, including those of this form owner. Never give out your password.</p> <p>Microsoft Forms AI-Powered surveys, quizzes and polls Create my own form</p> <p>Privacy and cookies Terms of use</p>
7	<p>Click the Personnel Action radio button then click Next.</p>  <p>PPC Customer Care Online Trouble Ticket</p> <p>* Required</p> <p>COMMAND, SPO, ADMIN SUPPORT ISSUE CATEGORY</p> <p>Please select the appropriate category.</p> <p>Choose the item relevant to your issue (CAT) *</p> <p><input type="radio"/> Password/User Access</p> <p><input type="radio"/> Pay Action</p> <p><input checked="" type="radio"/> Personnel Action</p> <p><input type="radio"/> Travel</p> <p>Back Next</p>
8	<p>Choose HR Data Request from the drop-down. Click Next.</p>  <p>PPC Customer Care Online Trouble Ticket</p> <p>* Required</p> <p>COMMAND, SPO, ADMIN SUPPORT PERSONNEL ACTIONS</p> <p>Please select the appropriate category.</p> <p>Choose the item relevant to your issue (PERS) *</p> <p>HR Data Request</p> <p>Back Next</p>

Continued on next page

ADHOC Report Requests, Continued

Procedures,
continued

Step	Action
<p>9</p>	<p>Include the following items in the Detailed Information About Your Request block of the form:</p> <ul style="list-style-type: none"> • Type “ADHOC REPORT” • The current Unit ID and Description • A statement that you have attempted to locate the needed data through CGBI. • A complete description of the query including: <ul style="list-style-type: none"> - Justification for the ADHOC request (Why do you need it? What will it be used for?). - Fields to be included (i.e. name, Empl ID, rate/rank, etc.) - When is the report needed? (Remember, if the requested turn around is less than 15 business days you MUST include justification). 
<p>10</p>	<p>Upload supporting documents as appropriate.</p> 

Continued on next page

ADHOC Report Requests, Continued

Procedures,
continued

Step	Action
11	<p data-bbox="328 488 512 517">Click Submit.</p> <div data-bbox="328 517 1366 1014"><p data-bbox="355 533 743 560">PPC Customer Care Online Trouble Ticket</p><p data-bbox="355 571 448 593">* Required</p><p data-bbox="355 600 962 629">DETAILED INFORMATION ABOUT YOUR REQUEST</p><p data-bbox="355 645 1070 672">Please provide specific information about your request for assistance including uploads.</p><p data-bbox="355 680 943 707">Please explain in detail the circumstances of your request. *</p><div data-bbox="355 719 1345 813"><p data-bbox="371 725 528 748">ADHOC REPORT</p><p data-bbox="371 752 679 779">Current Unit (ID and Description)</p><p data-bbox="371 781 1318 808">Report Date (on USCG Example) Depart date (if departed USCG Example) POC: YNC at (757)555-1212</p></div><p data-bbox="355 819 1262 846">Please upload all relevant documents to support the request. (Non-anonymous question🗨)</p><p data-bbox="387 862 512 889">📎 Upload file</p><p data-bbox="355 911 1147 934">File number limit: 10 Single file size limit: 100MB Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio</p><p data-bbox="392 965 437 987">Back</p><p data-bbox="523 965 584 987">Submit</p></div>
