PDREP

PRODUCT DATA REPORTING AND EVALUATION PROGRAM

Survey, Special Quality Data & Test Records Applications User Guide

User Guide

02 October 2024

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FOREWORD

This user guide provides information about the Product Data Reporting and Evaluation Program - Automated Information System (PDREP-AIS) and is intended to assist users with module functionality. This document does not cover specific policy or procedure and is designed to work in concurrence with existing processes. This guide does not replace or amend any Department of Defense (DoD) instructions, regulations, and/or policies. Revisions to this guide are made after application changes have been implemented. Date of last amendment is located on the title page. Though this documents is accessible to all users, its content is intended for those individuals with module access. Module access is granted on a case by case and need to know basis.

NOTE: The data contained within this guide is <u>NOT</u> real data and it is <u>NOT</u> to be used for business purposes. The material presented is intended to serve as an example only and was taken from a test system.

REFERENCES

- <u>Defense Contract Management Agency (DCMA) Guide Book</u>
- <u>SECNAV Instruction 4855.3</u>
  Secretary of the Navy Instruction 4855.3, Product Data Reporting and Evaluation Program
- <u>NAVSO P3683</u>
  Navy Standard Operating Procedure 3683 (NAVSO P-3383), Navy and Marine Corps Product Data Reporting and Evaluation Program

INTRODUCTION

This document is intended to guide personnel in the use of Product Data Reporting and Evaluation Program – Automated Information System (PDREP-AIS) Survey, Special Quality Data (SQD), and Test Records modules.

The PDREP-AIS is accessible via the Product Data Reporting and Evaluation Program home page: https://www.pdrep.csd.disa.mil/

Getting Access

- **First Time Users**

  First time users are required to submit an on-line PDREP-AIS System Authorization Access Request (SAAR) form. Instructions are available on the PDREP home page as linked above. Click on the Request Access link for instructions on filling out an access request form. When requesting an account, ensure all fields indicated as mandatory are completely filled out. Mandatory fields are indicated by (M). The application will not be accepted if required information is missing.

- **Existing PDREP Users**

  Existing PDREP users may request additional or updated access privileges by submitting an updated SAAR. To do this, log into the PDREP-AIS and hover over your name in the upper right corner of the page and select ‘Access Change Request’. Update the SAAR and enter a narrative to describe requested changes, read and acknowledge the User Agreement and click ‘Sign and Submit Account Change Request’ button to complete the submission.

Contact us

Contact us by submitting a help desk ticket either via the "Contact Help Desk" button in the lower right corner of our PDREP website or via the "Help" menu within the PDREP-AIS Application.

Additional contact information is below if you do not have an active PDREP-AIS account:

NSLC Portsmouth Help Desk
FAX: (207) 438-6535
Email: pdrep-helpdesk@us.navy.mil

Mailing Address
Naval Sea Logistics Center Portsmouth
Bldg. 153, 2nd Floor
Portsmouth Naval Shipyard
Portsmouth, NH 03804-5000

Additional Resources available on the NSLC Portsmouth Homepage

In order to aid PDREP-AIS users, reference these additional resources as needed:

FAQ – On the PDREP website under References, the Frequently Asked Questions page gives quick answers to the most commonly received inquiries. Your question(s) may be easily answered there.

Guides & Manuals – This area of the PDREP website (under References) houses the PDREP-AIS' technical documents. These comprehensive guides serve to offer directive on operational tasks and enable users to pinpoint or problem solve without expert assistance. These manuals do not instruct on policy or process and are instead stepwise instructions on using the PDREP-AIS application. Relevant process and policy are however referenced in the beginning of each of these manuals.

Online Training – Computer-based distance learning may be accessed through the Reference fly-out of the PDREP website. Instruction takes place remotely via instructor-led directive, module simulation, video-conferencing, application demonstration, or recorded lesson.

FAQ, User Guides, and Online Training are also accessible within PDREP-AIS by hovering over the 'Help' link located at the top left of each application page.

1 MAIN PDREP APPLICATION SCREEN

Once you have logged in, the PDREP Home page will display (see **Figure 1.1**). You may not see all of the options listed depending on your level of access. Accessing the different modules in this user guide is the same as described in this section. If the module link does not appear on the PDREP Main Menu, the user should complete an Access Change Request (see User Access User Guide). Links on the PDREP Main Menu only appear if the user has been granted access to that module in their user profile.

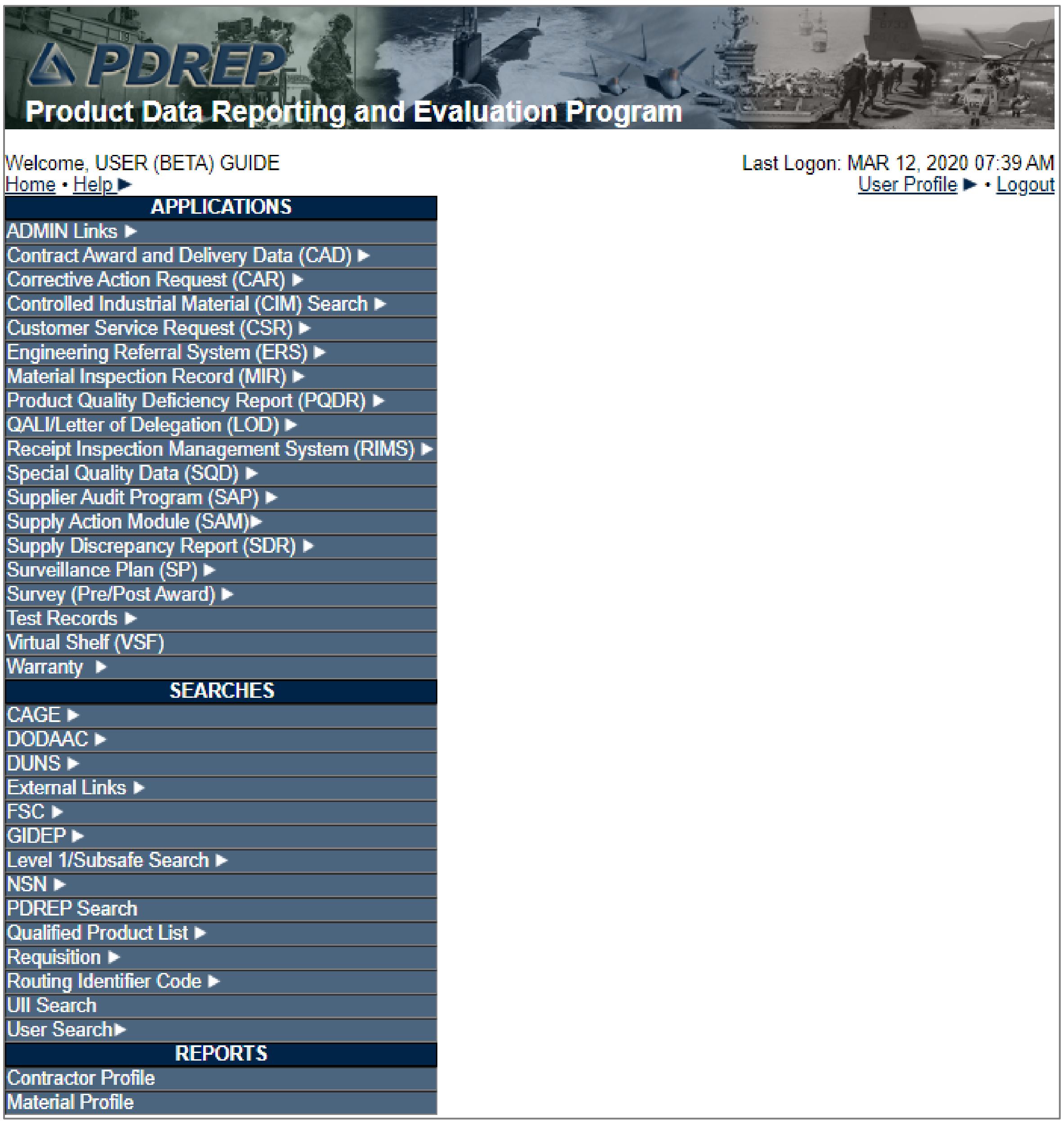


Figure 1.1

1.1 Finding the Fly Outs

Hover your mouse pointer over any PDREP Application located on the upper left portion of the screen and a list of sub-links for that application will appear (see **Figure 1.2**).

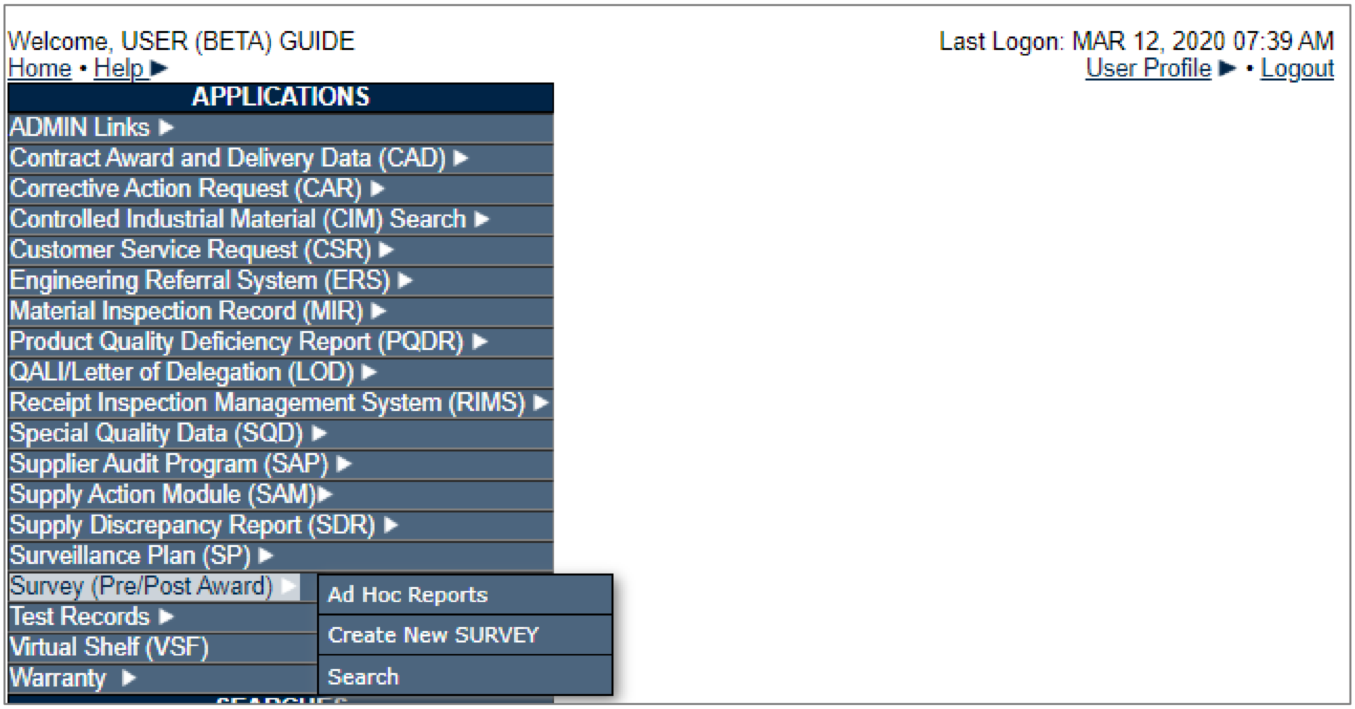


Figure 1.2

1.2 Selecting the Fly Outs

Selecting any of the sub-links will allow the user to go directly to that page within the application (see **Figure 1.2**).

2 SURVEY (PRE/POST) AWARD RECORDS

2.1 Searching and Viewing Existing Survey Records

To access the "Search" function, select the hyperlink from the Survey (Pre/Post Award) fly out options (see **Figure 2.1**).

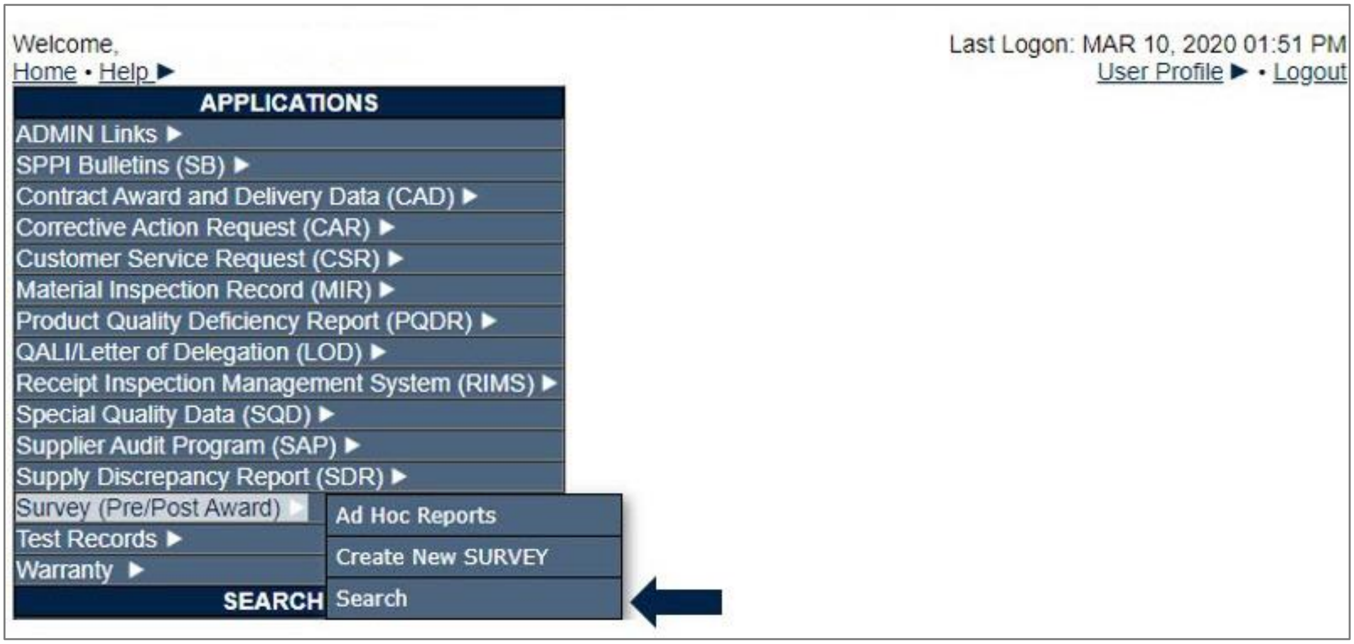


Figure 2.1

If already working in the Survey (Pre/Post Award) module, the user may access the *Search* screen by selecting the Survey Search tab (see **Figure 2.2**).

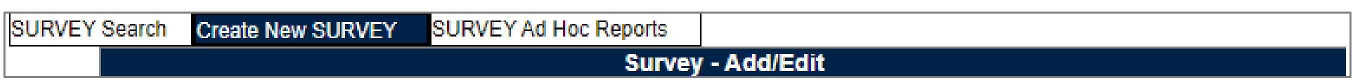


Figure 2.2

Upon selecting either option, the user will be navigated to the Survey Search page (see **Figure 2.3**).

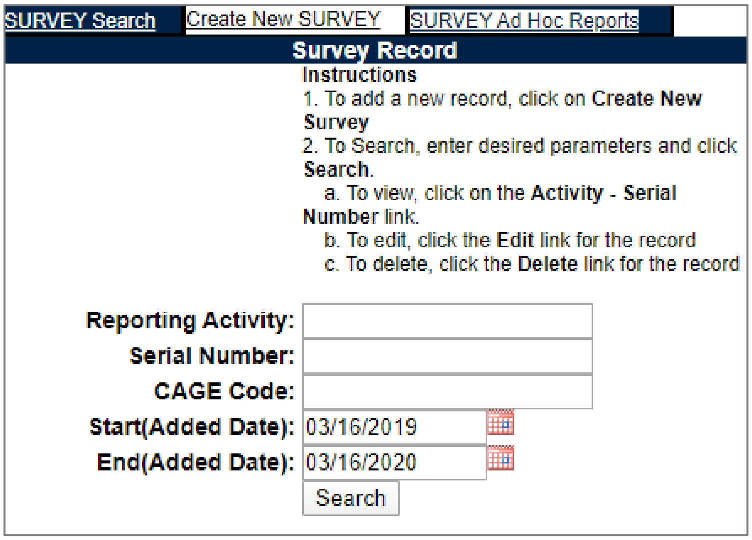


Figure 2.3

A. Enter the Reporting Activity's six character DODAAC, the company's five-character CAGE Code, or the record's unique identifying Serial Number.

B. The Start Date and End Date provide the date range for the search query. These dates limit returned results based on the 'Report Issue Date' of the record. The Report Issue Date refers to the date the Survey Report was signed out.

C. Click the "Search" button to display the list of Survey records retrieved. The resulting set may be filtered by Reporting Activity, Serial Number, CAGE Code and/or date range. A sample result set is shown in **Figure 2.4**.

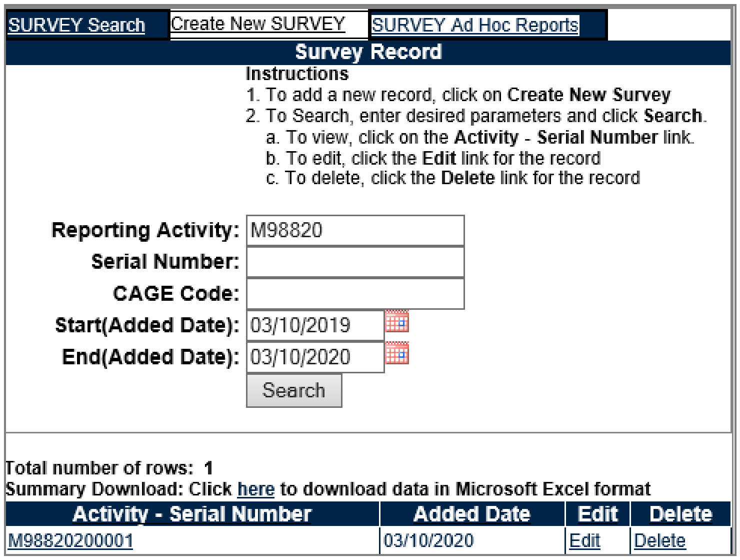


Figure 2.4

D. Clicking the '*Activity - Serial Number*' (see **Figure 2.5**) hyperlink for the record of interest will display a view of the Survey as seen in **Figure 2.6**.

Activity - Serial Number	Added Date	Edit	Delete
M98820200001	03/10/2020	Edit	Delete

Figure 2.5

E. To return to the previous screen click the "Back" button.

F. To print the displayed data, click the "Print" button.

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)

Home • Help ▶ User Profile: USER (BETA) GUIDE ▶ • Logout

Print Back

Survey - View Data

Date: 03/16/2020

Reporting/Requesting Activity:
Serial Number: 190883
CAGE Code: CPARS
Survey Type: POST-AWARD
Report Issue Date: 09/02/2019
Contractor Assessment Code: AWARD
Material Level Code: QA-1, QC-22, LEVEL 1 NON-NUCLEAR
External Control Number: 0010001
Contract Number:
Corrective Action Indicator: NO
Corrective Action Completed Date:
Navy Participation Indicator: YES
Narrative: TEST FOR USER GUIDE

Added Date: 09/11/2019
Added Activity:
Update Date: 09/12/2019
Update Activity:

FSC

FSC	Material Description
9999	MISCELLANEOUS ITEM

Specification
MILI1222

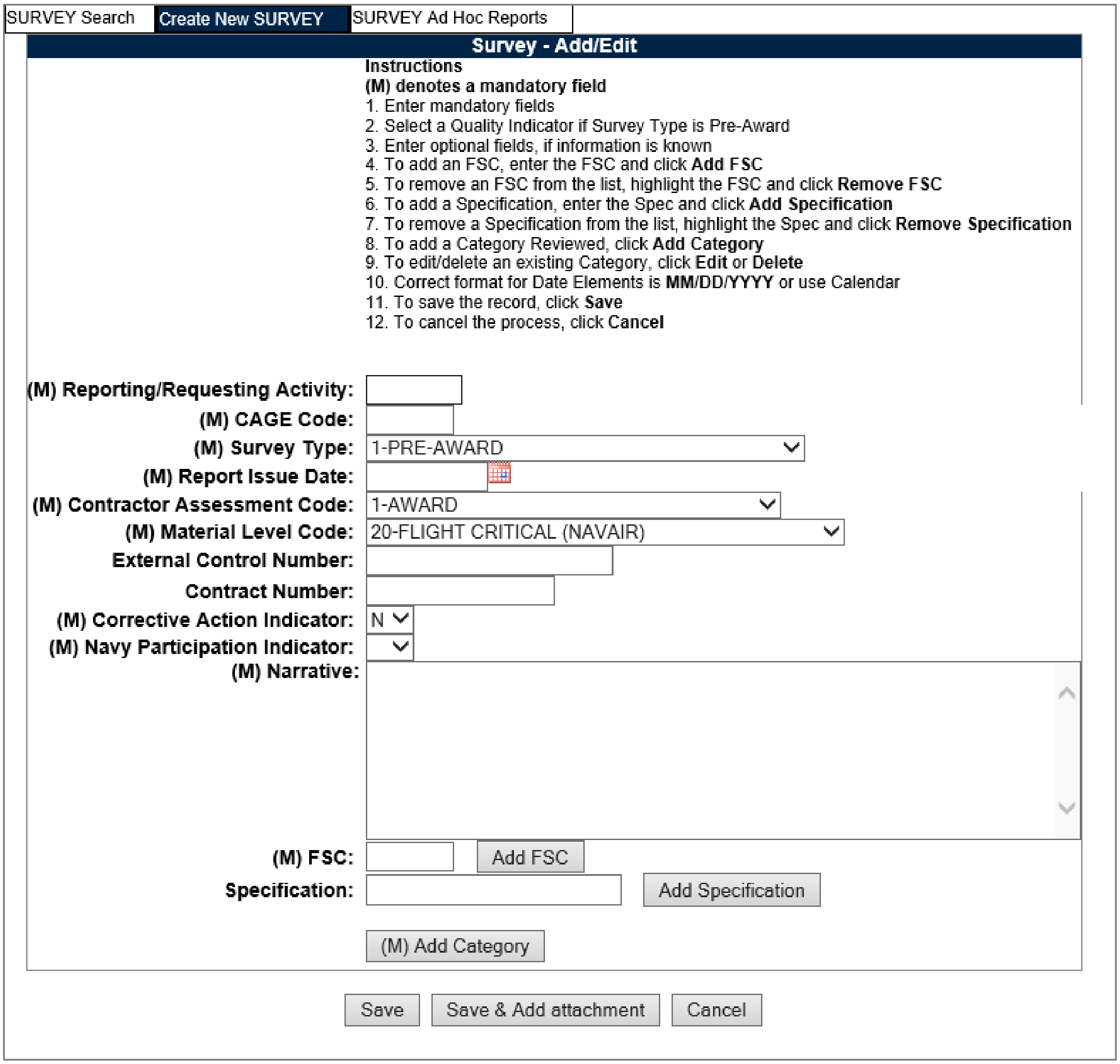
Category

Cat Reviewed	Literal	No of Deficiencies
11	PRODUCTION CAPABILITY	1

Figure 2.6

2.2 Add or Edit Survey Records

A. To add a new Survey record, select the “Create New SURVEY” tab shown in **Figure 2.2**. The user is directed to a blank Survey – Add/Edit form shown in **Figure 2.7**.


SURVEY Search | Create New SURVEY | SURVEY Ad Hoc Reports

Survey - Add/Edit

Instructions

(M) denotes a mandatory field

1. Enter mandatory fields
2. Select a Quality Indicator if Survey Type is Pre-Award
3. Enter optional fields, if information is known
4. To add an FSC, enter the FSC and click **Add FSC**
5. To remove an FSC from the list, highlight the FSC and click **Remove FSC**
6. To add a Specification, enter the Spec and click **Add Specification**
7. To remove a Specification from the list, highlight the Spec and click **Remove Specification**
8. To add a Category Reviewed, click **Add Category**
9. To edit/delete an existing Category, click **Edit** or **Delete**
10. Correct format for Date Elements is **MM/DD/YYYY** or use Calendar
11. To save the record, click **Save**
12. To cancel the process, click **Cancel**

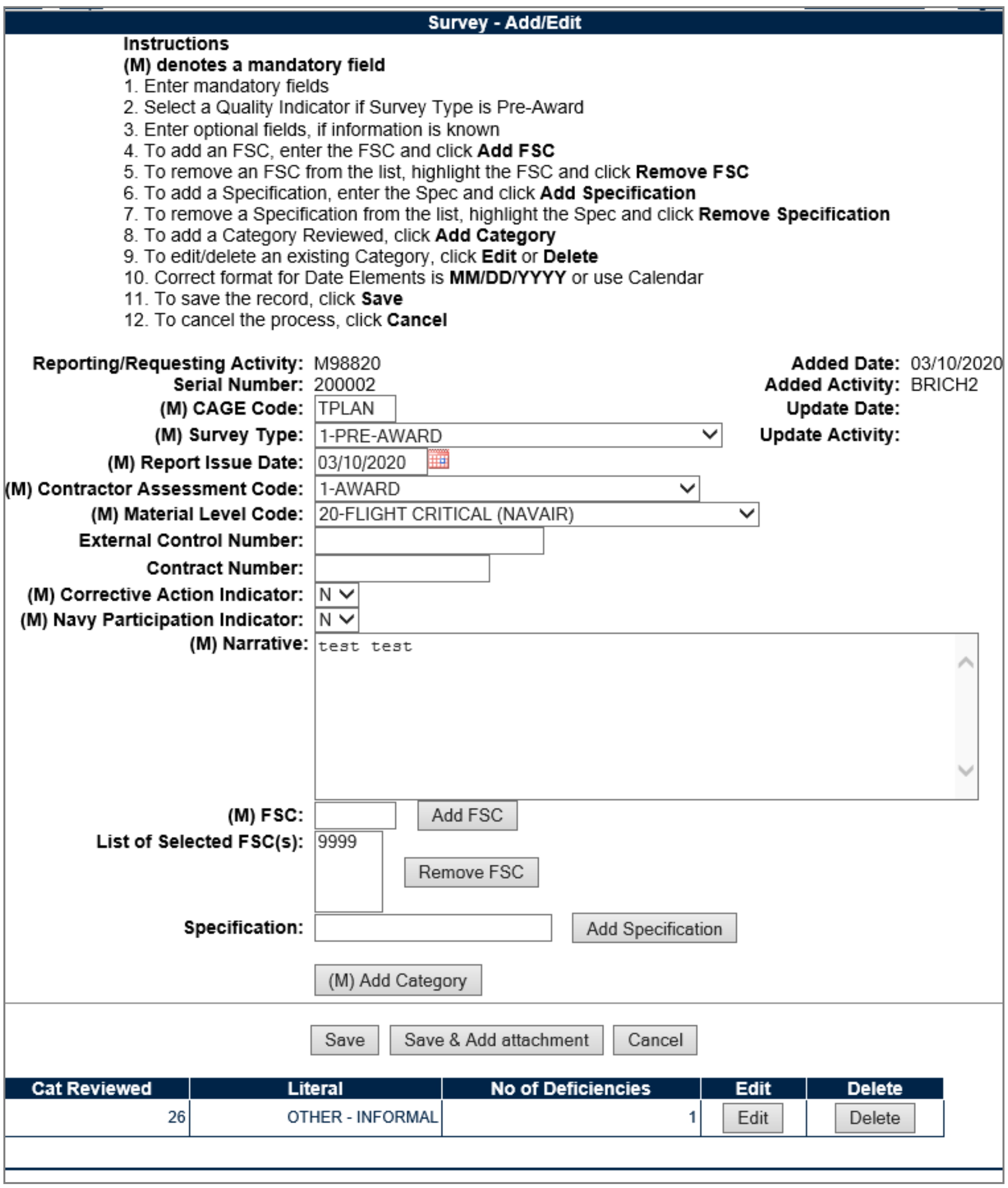
(M) Reporting/Requesting Activity:
(M) CAGE Code:
(M) Survey Type: 1-PRE-AWARD
(M) Report Issue Date:
(M) Contractor Assessment Code: 1-AWARD
(M) Material Level Code: 20-FLIGHT CRITICAL (NAVAIR)
External Control Number:
Contract Number:
(M) Corrective Action Indicator: N
(M) Navy Participation Indicator:
(M) Narrative:
(M) FSC: Add FSC
Specification: Add Specification
(M) Add Category

Save | Save & Add attachment | Cancel

Figure 2.7

B. To edit an existing Survey record, the user should follow the search procedures in Section 2.1 to locate a specific record. Once the record is located, click the "Edit" hyperlink shown in **Figure 2.4** for the record of interest. The user is then directed to an existing Survey – Add/Edit form where the fields have been pre-populated (see **Figure 2.8**).

NOTE: *Editing is only permitted for records for which the user has permissions, which is based on the access level of their user profile.*



Survey - Add/Edit

Instructions
(M) denotes a mandatory field
1. Enter mandatory fields
2. Select a Quality Indicator if Survey Type is Pre-Award
3. Enter optional fields, if information is known
4. To add an FSC, enter the FSC and click **Add FSC**
5. To remove an FSC from the list, highlight the FSC and click **Remove FSC**
6. To add a Specification, enter the Spec and click **Add Specification**
7. To remove a Specification from the list, highlight the Spec and click **Remove Specification**
8. To add a Category Reviewed, click **Add Category**
9. To edit/delete an existing Category, click **Edit** or **Delete**
10. Correct format for Date Elements is **MM/DD/YYYY** or use Calendar
11. To save the record, click **Save**
12. To cancel the process, click **Cancel**

Reporting/Requesting Activity: M98820
Serial Number: 200002
(M) CAGE Code: TPLAN
(M) Survey Type: 1-PRE-AWARD
(M) Report Issue Date: 03/10/2020
(M) Contractor Assessment Code: 1-AWARD
(M) Material Level Code: 20-FLIGHT CRITICAL (NAVAIR)
External Control Number:
Contract Number:
(M) Corrective Action Indicator: N
(M) Navy Participation Indicator: N
(M) Narrative: test test

Added Date: 03/10/2020
Added Activity: BRICH2
Update Date:
Update Activity:

(M) FSC: Add FSC
List of Selected FSC(s): 9999 Remove FSC
Specification: Add Specification
(M) Add Category

Save | Save & Add attachment | Cancel

Cat Reviewed	Literal	No of Deficiencies	Edit	Delete
26	OTHER - INFORMAL	1	Edit	Delete

Figure 2.8

C. To enter data into the Survey – Add/Edit form, follow the instructions below:

1. Data fields preceded by an **(M)** require data entry.
2. Select a Quality Indicator if Survey Type is Pre-Award.
3. Enter optional fields, if information is known.
4. To add a Federal Supply Class (FSC), enter the FSC and click the "Add FSC" button.
5. To remove an FSC from the list, highlight the FSC and click "Remove FSC" button.
6. To add a Specification, enter the specification and click "Add Specification" button.
7. To remove a Specification from the list, highlight the specification and click "Remove Specification" button.
8. To upload an attachment to the Survey, click the "Save and Add Attachment" button.
9. To add a Category Reviewed, click "Add Category" button. Add Category will appear directly below the "Add Category" button (see **Figure 2.9**).

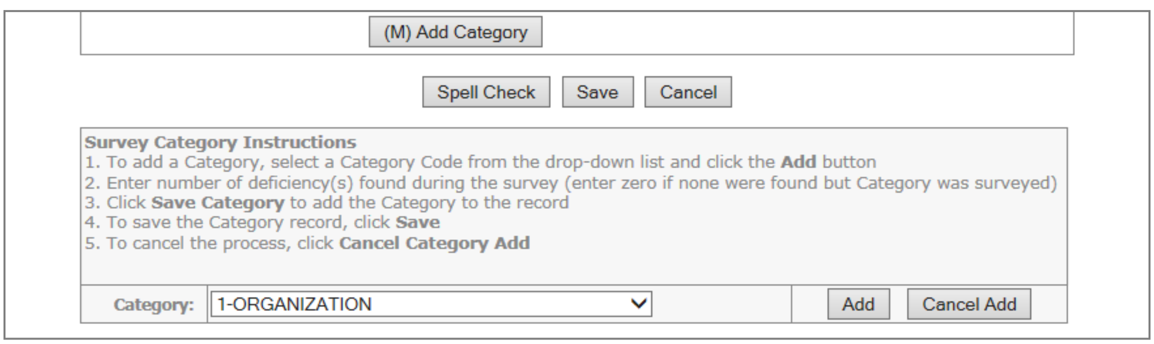


Figure 2.9

10. Select a category from the Category drop-down box and Click the "Add" button.
11. Once the Add button is clicked, the following window will appear (see **Figure 2.10**).

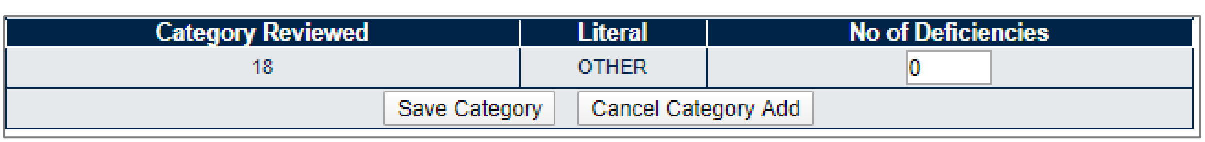


Figure 2.10

12. Enter the number of deficiencies, if any.

13. Click the “Save Category” button to save or click the “Cancel Category” button to escape.

14. Once the “Save Category” button is clicked, the category has been saved, as shown in **Figure 2.11**.

Cat Reviewed	Literal	No of Deficiencies	Edit	Delete
18	OTHER	0	Edit	Delete

Figure 2.11

15. To edit/delete an existing Category, click “Edit” or “Delete” buttons in **Figure 2.11**.

16. Correct format for Date Elements is MM/DD/YYYY or use Calendar button.

17. To save the record, click the “Save” button.

18. To cancel the process, click the “Cancel” button.

D. To Add Attachments, click the “Save & Add Attachment” button.

1. Follow the onscreen instructions to add or view attachments to the Test Record.

2. When attachments have been \successfully uploaded, the record will automatically be saved and the user returned to the Survey-Add/Edit page (see **Figure 2.3**).

2.3 Deleting a Survey

Follow the instructions below to delete a Survey.

A. To delete an existing Survey, the user should follow the search procedures in Section 2.1. Once the record is located, click the “Delete” link in the result set displayed on the Survey tab.

B. The delete screen displays (see **Figure 2.12**).

NOTE: *Records can only be deleted if the user has edit rights, which are based on their user profile.*

C. Click the “Delete” button. A pop up will appear to confirm the deletion. Click “OK” to affirm the record should be deleted. Click “Cancel” to cancel the request.

D. To print a copy of what is to be deleted, click the “Print” button at the top of the page.

E. To abort the delete, click the “Back” button at the top of the page.

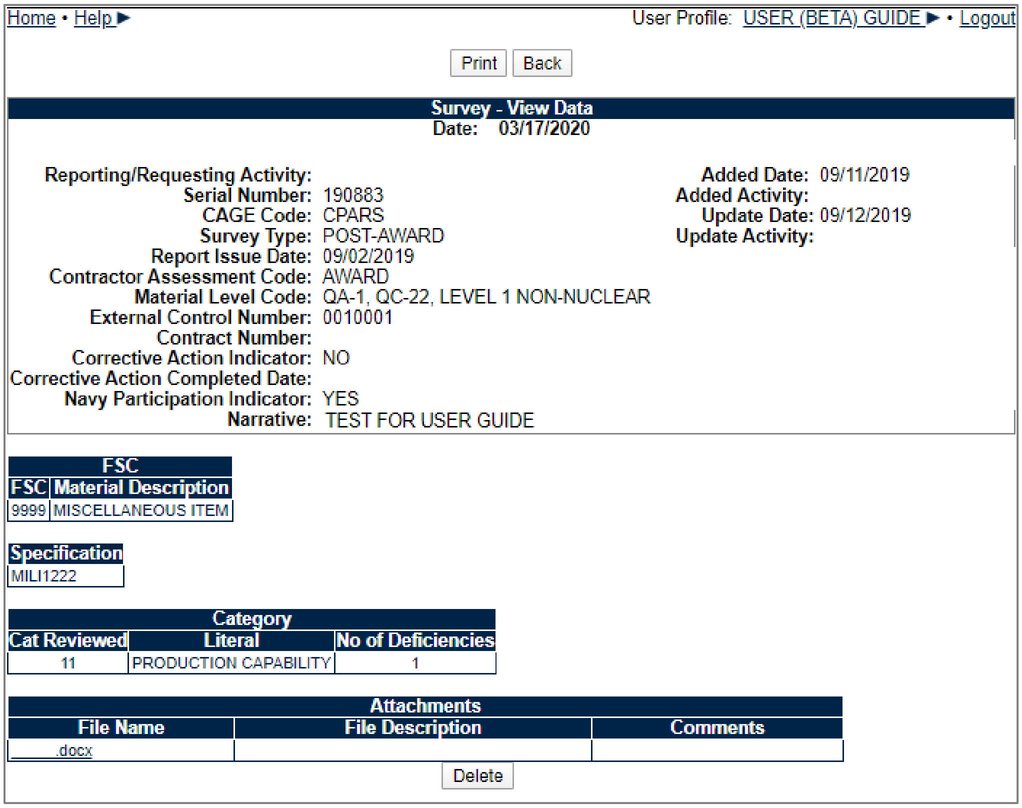


Figure 2.12

3 TEST RECORDS

3.1 Searching and Viewing Existing Test Records

A. To access the *Search* functionality, select the hyperlink from Test Records fly out options (see **Figure 3.1**).

Figure 3.1

B. If already working in the Test Records module, the user may also access the Search screen by selecting the TEST Search tab (see **Figure 3.2**) from the menu on the top of the screen.

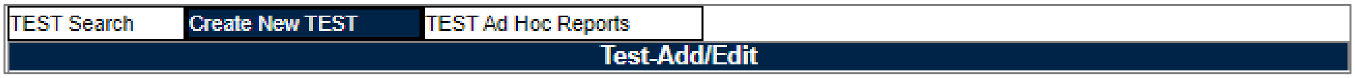


Figure 3.2

C. When either link is selected, the TEST Search screen will display (see **Figure 3.3**).

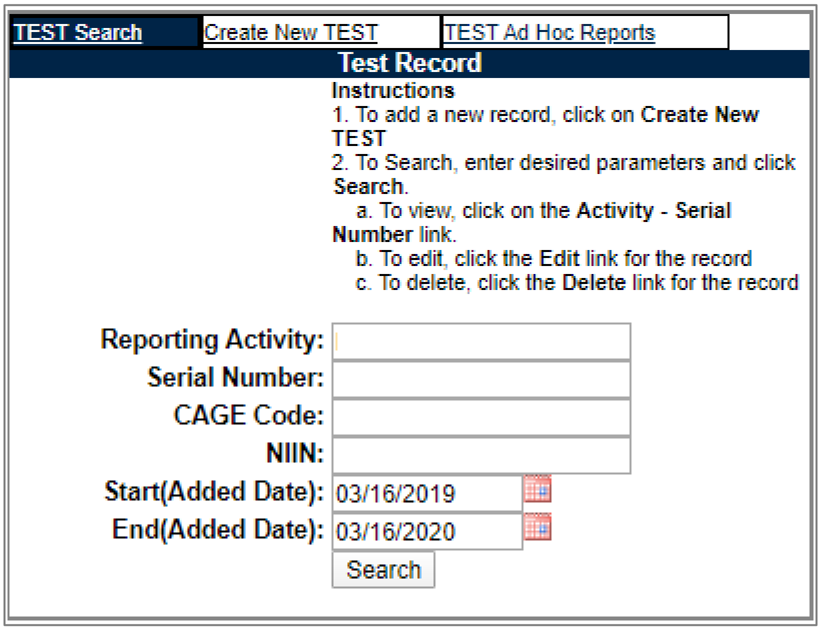


Figure 3.3

D. Enter the Reporting Activity's six character DODAAC, or a company's five character CAGE Code or the record's unique identifying Serial Number.

E. The Start Date and End Date provide a date range which may be changed if desired. These dates limit returned results based on the Added Date of the record. The Added Date refers to the date the record was added to the database.

F. Click the "Search" button to display the list of Test records to view. The results set may be filtered by Reporting Activity, Serial Number, CAGE Code or date range. A sample result set is shown in **Figure 3.4**.

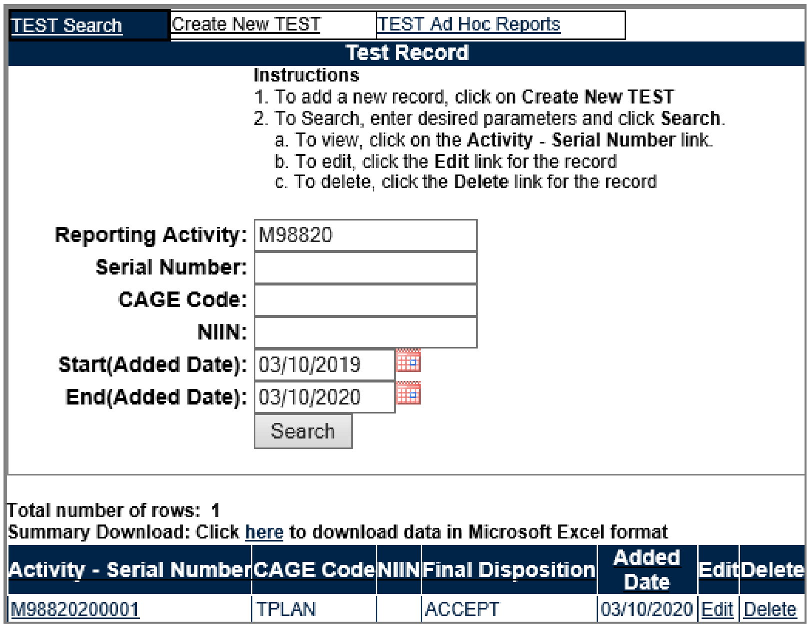


Figure 3.4

G. Clicking the "Activity Serial Number" link for the record of interest will display a view of the Test Record as seen in **Figure 3.5**.

Activity - Serial Number	CAGE Code	NIIN	Final Disposition	Added Date	Edit	Delete
M98820200001	TPLAN		ACCEPT	03/10/2020	Edit	Delete

Figure 3.5

H. To return to the previous screen click the "Back" button as seen in **Figure 3.6**.

I. To print the displayed data click the "Print" button as seen in **Figure 3.6**.

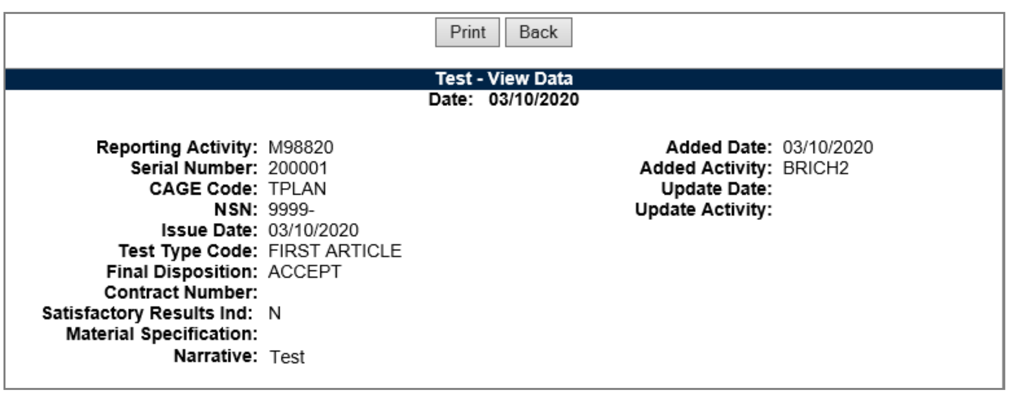


Figure 3.6

3.2 Add or Edit Test Records

A. To edit an existing Test Record, the user should follow the search procedures to locate a specific record. Once the record is located, click the “Edit” link (see **Figure 3.5**) for the record of interest. The user is then directed to the existing Test – Add/Edit form where the fields have been pre-populated (see **Figure 3.7**).

NOTE: *Editing records is only permitted for records for which the user has permissions; based on their user profile.*

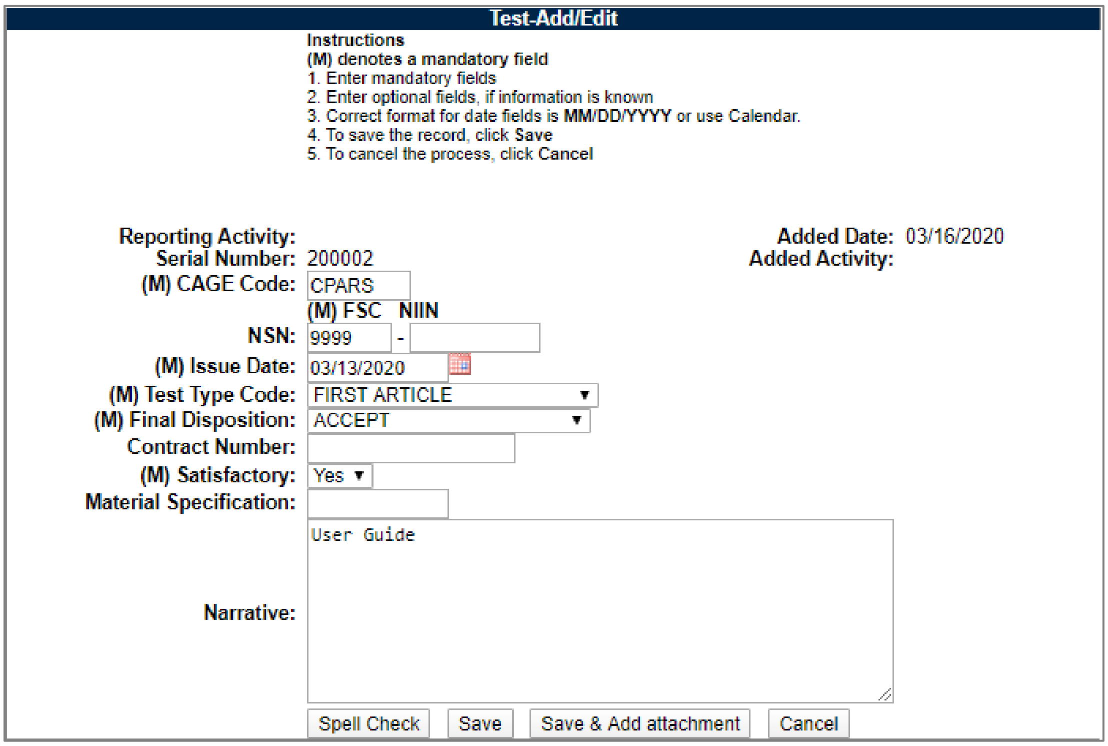


Figure 3.7

B. To add a new Test Record, select the “Create New TEST” Tab from the Test Record form (see **Figure 3.2**). The blank Test – Add/Edit form displays (see **Figure 3.8**).

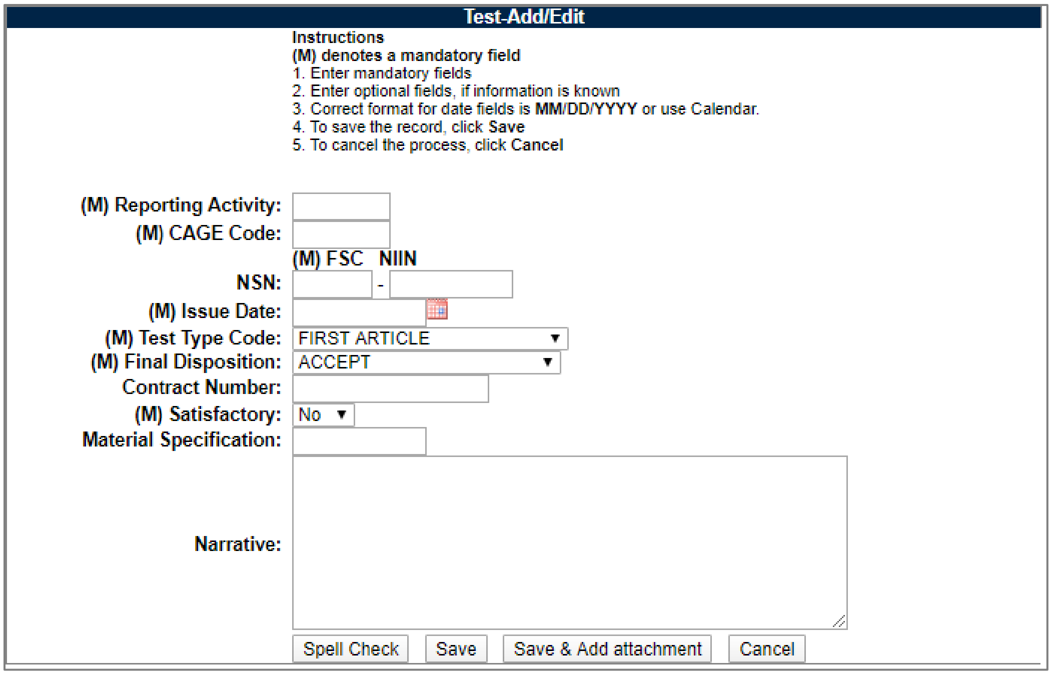


Figure 3.8

C. Steps to enter a new Test Record are as follows:

1. Data fields preceded by an **(M)** require data entry.
2. Enter optional fields, if information is known.
3. Enter the *CAGE Code* of the company being reported on.
4. Enter the *NSN*, which is made up of the Federal Supply Class (FSC) and national item identification number (NIIN), for material tested.
5. Enter the *Issue Date*; the date the actual report was created.
6. Enter a *Test Type Code* from the drop-down box provided.
7. Choose a *Final Disposition* from the drop-down box provided that describes the result of the test.
8. Enter the *Contract Number* for which the test was performed.
9. If the test of the material met all contract and specification requirements select “Yes” in the *Satisfactory* drop-down, otherwise select “No”.
10. Enter any specification to which the material tested was tested to in the *Material Specification* block.
11. In the *Narrative* block enter a summary of work performed and any amplifying information concerning the Test Record.

12. To add attachments, click the “Save & Add Attachment” button.
    i. Follow the onscreen instructions to add or view attachments to the Test Record.
    ii. When attachments have been successfully uploaded, the record will automatically be saved and the user returned to the Test – Add/Edit page (see **Figure 3.8**).
13. To save the record without attachments, click the “Save” button.
14. To cancel without saving any data since the last save action, click the “Cancel” button.

3.3 Deleting Test Records

Follow the instructions below to delete a Survey.

A. To delete an existing Survey, first follow the search procedures as outlined in Section 3.1. Once the record is located, click the “Delete” link in the result set displayed on the Survey tab.

B. The delete screen (see **Figure 3.9**) displays.

NOTE: *Records can only be deleted if the user has edit rights, which are based on their user profile.*

C. Click the “Delete” button. A pop up will appear to confirm the deletion. Click “OK” to affirm the record should be deleted. Click “Cancel” to cancel the request.

D. To print a copy of what is to be deleted, click the “Print” button at the top of the page.

E. To abort the delete, click the “Back” button at the top of the page.

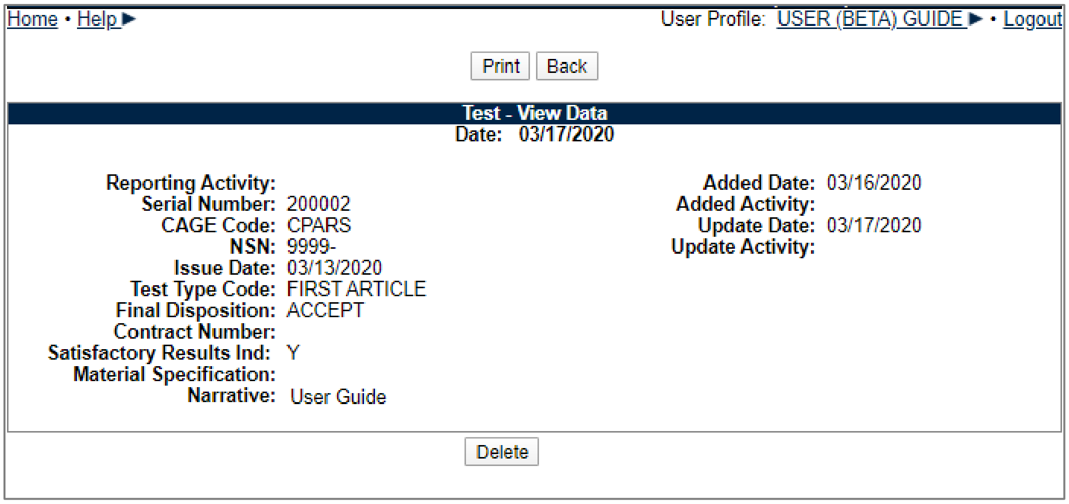


Figure 3.9

4 SPECIAL QUALITY DATA (SQD) RECORDS

4.1 Searching and Viewing Special Quality Data Records

A. To access the *Search* screen, select the hyperlink from Special Quality Data fly-out menu (see **Figure 4.1**).

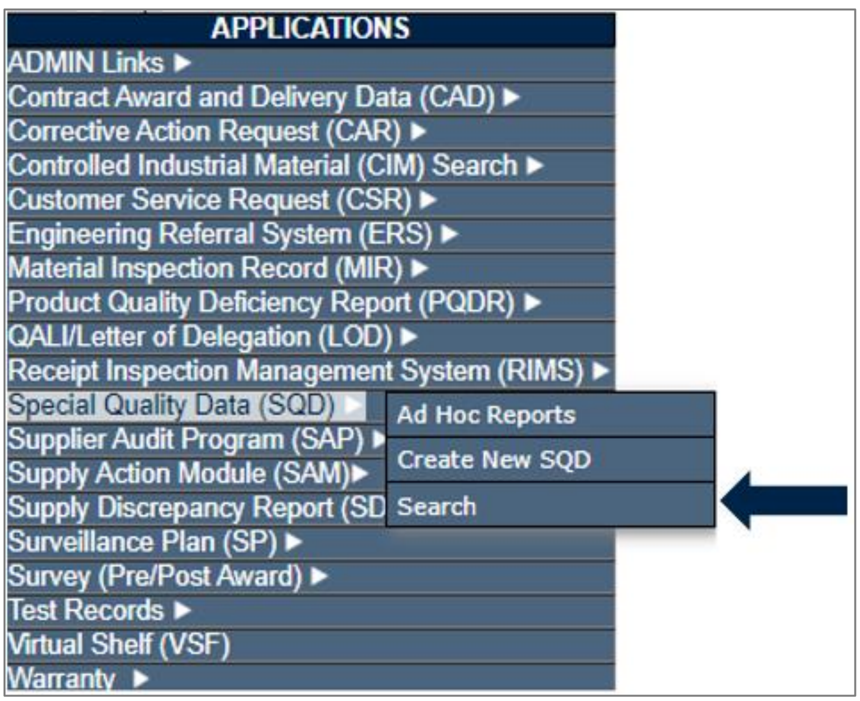


Figure 4.1

B. If already working in the Special Quality Data module, the user may access the *Search* screen by selecting the *SQD Search* tab (see **Figure 4.2**).

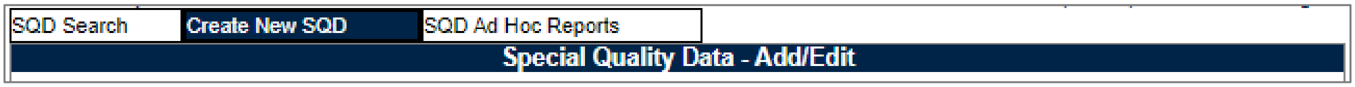


Figure 4.2

C. After clicking either of the links, the SQD Search screen will display (see **Figure 4.3**).

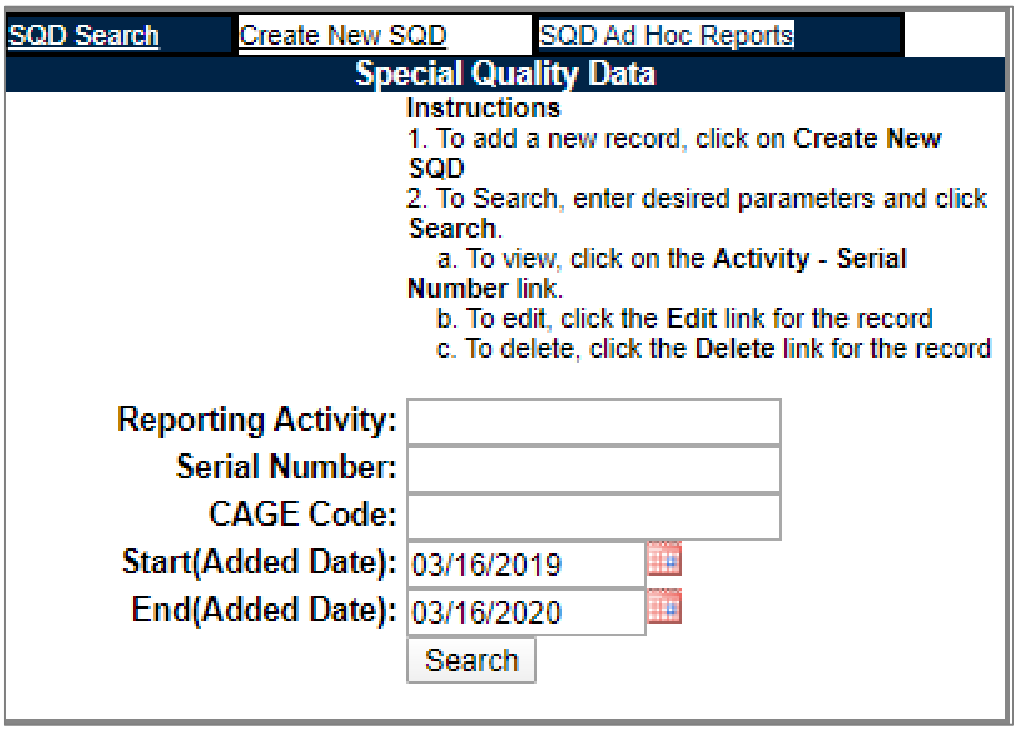


Figure 4.3

D. Enter the Reporting Activity's six character DODAAC, the company's five character CAGE Code, and/ or the unique identifying Record Serial Number.

E. Users may enter only a Reporting Activity when the serial number is not known.

F. The Start Date and End Date provide a date range, which may be changed if desired. These dates limit returned results base on the Issue Date of the record. The Issue Date refers to the date the Special Quality Data record was entered in the PDREP-AIS database.

G. Click the “Search” button. The results of the search will display below the Search button as shown in **Figure 4.4**.

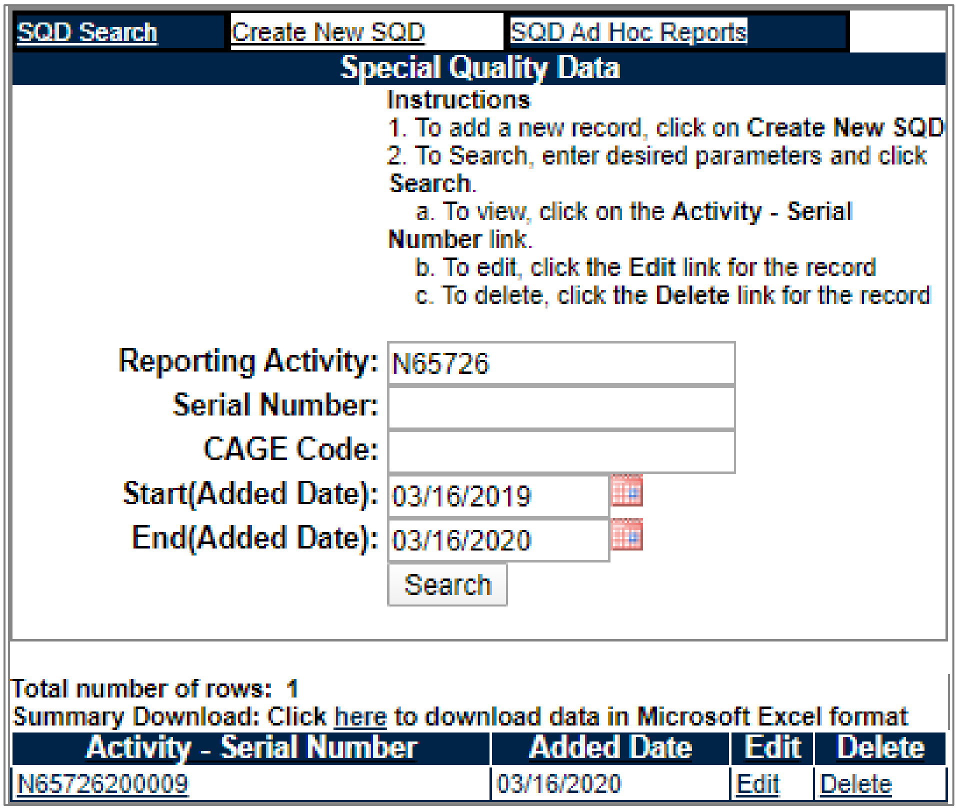
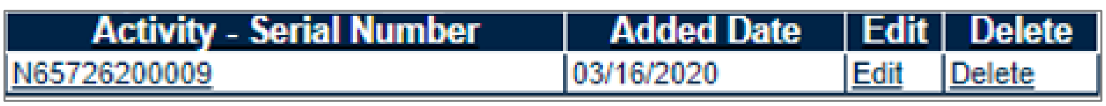


Figure 4.4

H. Clicking the “Activity - Serial Number” (see **Figure 4.5**) hyperlink for the record of interest will display the Special Quality Data – View Data form (see **Figure 4.6**).



Activity - Serial Number	Added Date	Edit	Delete
N65726200009	03/16/2020	Edit	Delete

Figure 4.5

I. To return to the previous screen click the “Back” button.

J. To print the displayed data click the “Print” button.

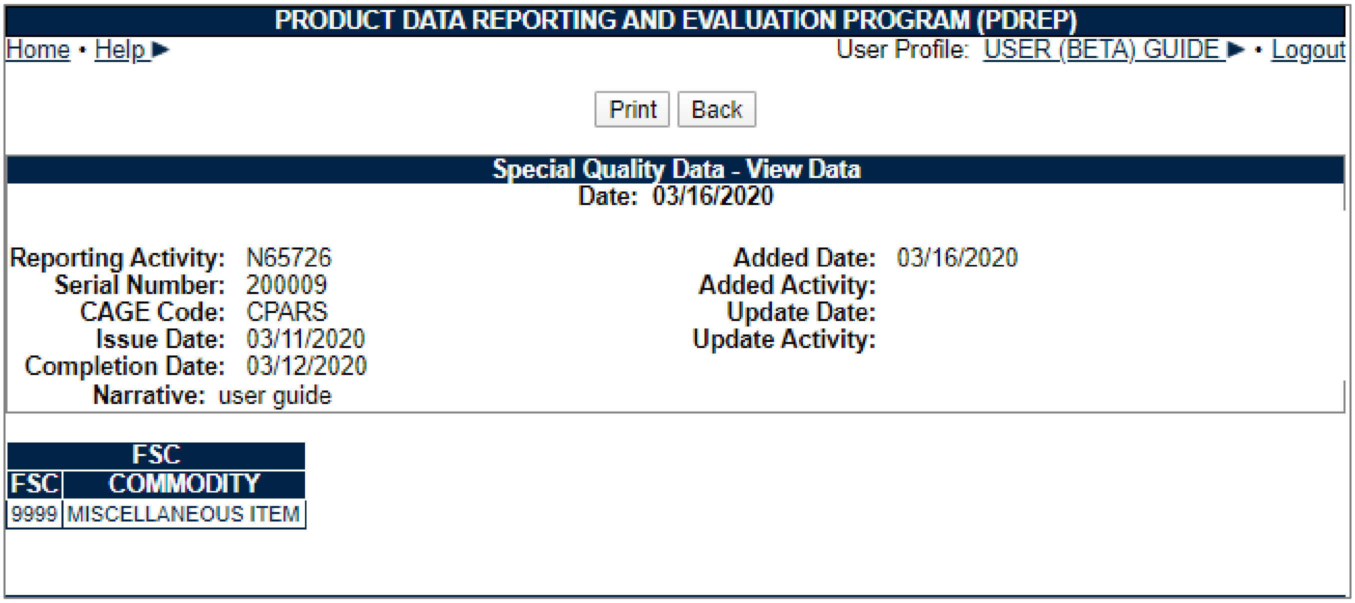
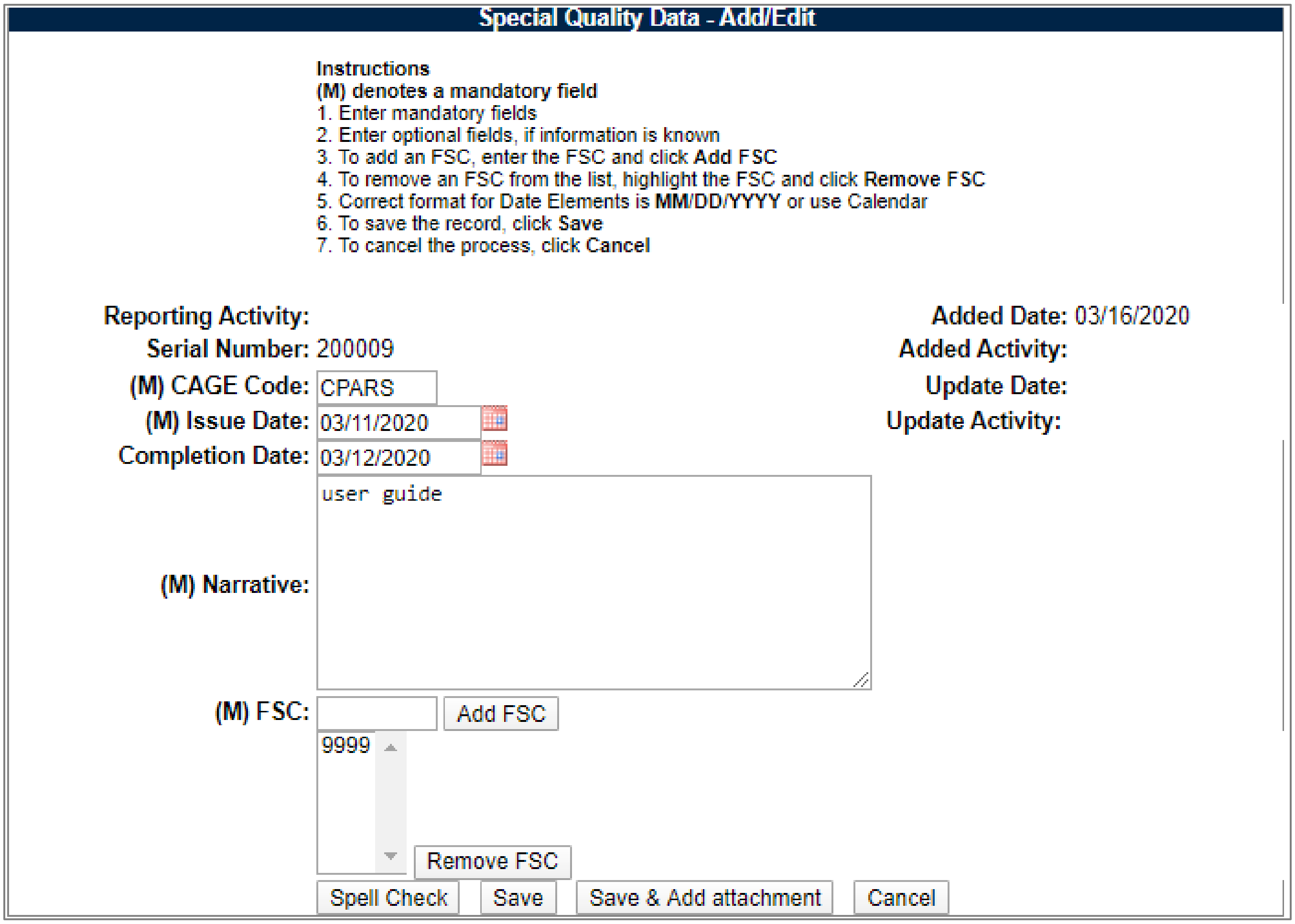


Figure 4.6

4.2 Add or Edit Special Quality Data Records

A. To edit an existing Special Quality Data Record, the user should follow the search procedures in Section 4.1 to locate the specific record. Once the record is located, click the “Edit” link (see **Figure 4.4**) for the record of interest. The user is then directed to the existing Special Quality Data – Add/Edit form, where associated data fields have been pre-populated (see **Figure 4.7**).

NOTE: *Records can only be deleted if the user has edit rights, which are based on their user profile. Use spell check to check Narrative spelling.*



Special Quality Data - Add/Edit

Instructions
(M) denotes a mandatory field
1. Enter mandatory fields
2. Enter optional fields, if information is known
3. To add an FSC, enter the FSC and click **Add FSC**
4. To remove an FSC from the list, highlight the FSC and click **Remove FSC**
5. Correct format for Date Elements is **MM/DD/YYYY** or use Calendar
6. To save the record, click **Save**
7. To cancel the process, click **Cancel**

Reporting Activity:
Serial Number: 200009
(M) CAGE Code: CPARS
(M) Issue Date: 03/11/2020
Completion Date: 03/12/2020
(M) Narrative: user guide
(M) FSC: Add FSC
9999
Remove FSC

Added Date: 03/16/2020
Added Activity:
Update Date:
Update Activity:

Spell Check | Save | Save & Add attachment | Cancel

Figure 4.7

B. To add a new Special Quality Data record, select the “Create New SQD” hyperlink from the fly-out menu, or from the menu tab at the top of the screen. The Special Quality Data – Add/Edit form displays (see **Figure 4.8**).

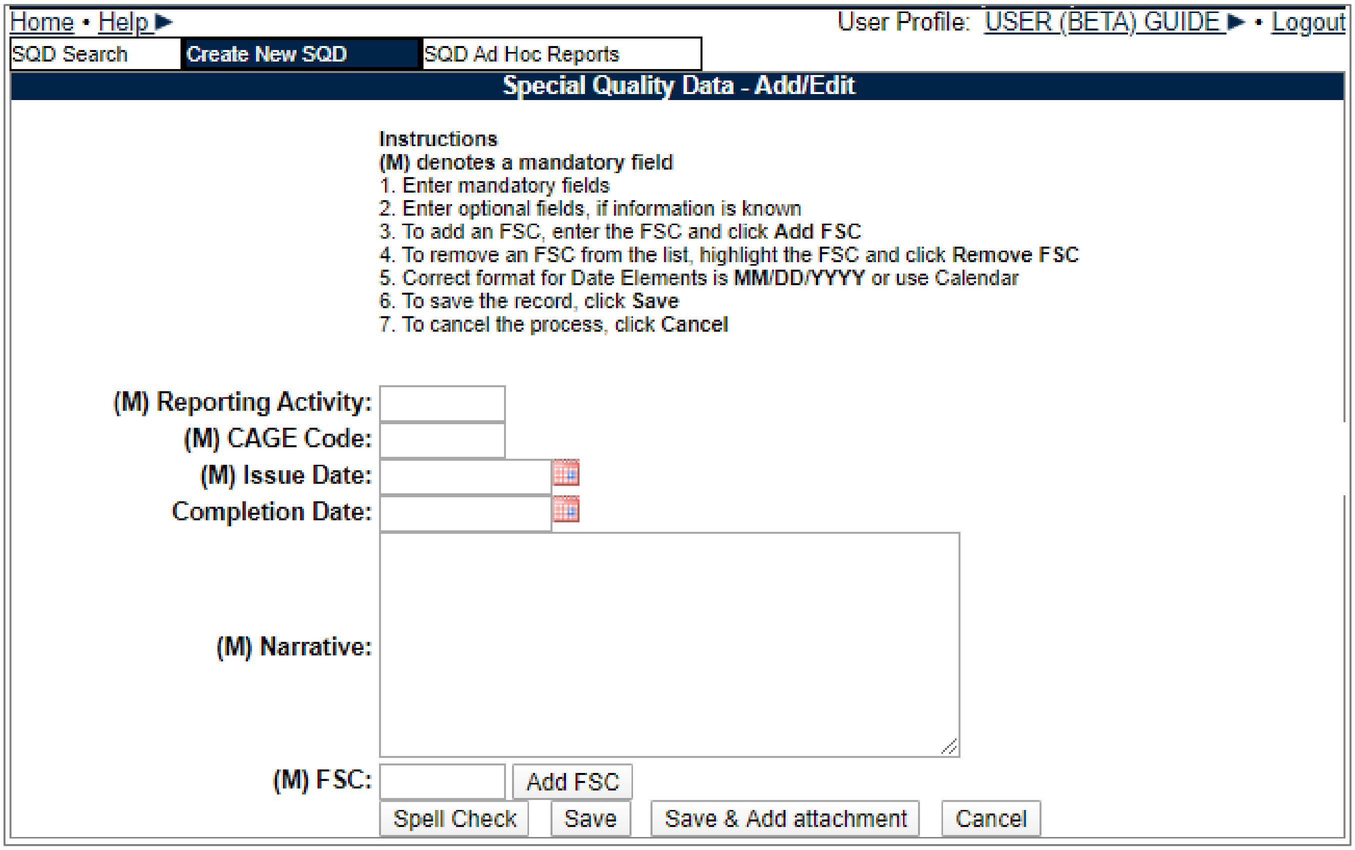


Figure 4.8

C. To enter data into the Special Quality Data record, follow the instructions below:

1. Data fields preceded by an **(M)** require data entry.
2. Enter optional fields, if information is known.
3. Enter the CAGE Code of the company being reported on.
4. Enter an Issue Date.
5. Enter a Completion Date.
6. In the *Narrative* block enter a summary of work performed and any amplifying information concerning the Special Quality Data Record.
7. To add a Federal Supply Class (FSC), enter the FSC and click the “Add FSC” button. To remove an FSC from the list, highlight the FSC and click “Remove FSC” button.
8. To add attachments, click the “Save & Add Attachment” button and follow the onscreen instructions to add or view attachments to the Special Quality Data Record.

9. To save the record, click the “Save” button.
10. To cancel the process, click “Cancel” button.

4.3 Deleting Special Quality Data Records

A. Follow the instructions below to delete a SQD record.

1. To delete an existing SQD record, the user should follow the search procedures in Section 4.1. Once the record is located, click the “Delete” link in the result set displayed on the Survey tab.
2. The delete screen (see **Figure 4.9**) displays.

NOTE: *Records can only be deleted if the user has edit rights, which are based on their user profile.*

3. Click the “Delete” button. A pop up will appear to confirm the deletion. Click “OK” to affirm the record should be deleted. Click “Cancel” to cancel the request.
4. To print a copy of what is to be deleted, click the “Print” button at the top of the page.
5. To abort the delete, click the “Back” button at the top of the page.

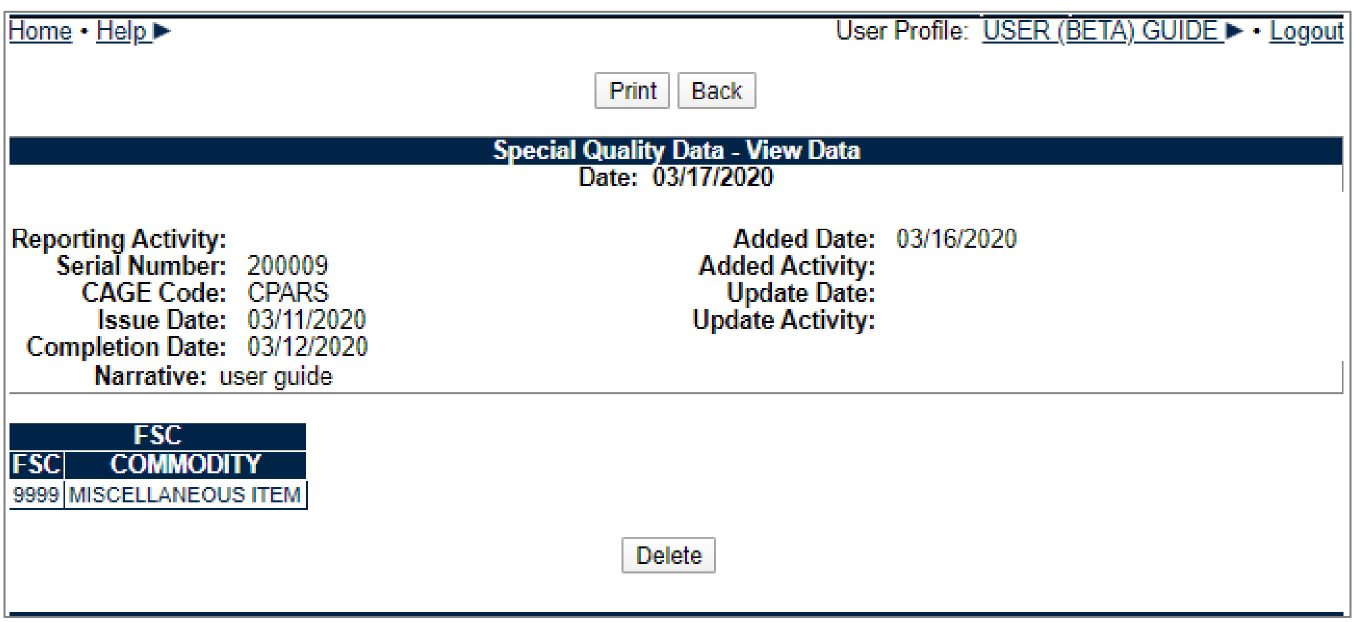


Figure 4.9

5 AD HOC REPORTS

5.1 Accessing Ad Hoc Reports

Accessing the Ad Hoc report screen is the same for each module in this guide. Detailed information on how to perform Ad Hoc queries may be found in the ADHOC Search User Guide, located in the Guides and Manuals section of the PDREP website.

This section will utilize the Test Records module as an example. Select Ad hoc from the main menu fly-out, or click the Ad Hoc tab once in the module (see **Figure 5.1** and **Figure 5.2**). **Figure 5.3** illustrates the default display of the Ad Hoc Report interface. Instructions on the screen provide additional direction for using the interface for performing queries.

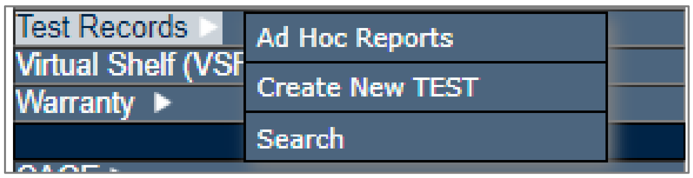


Figure 5.1

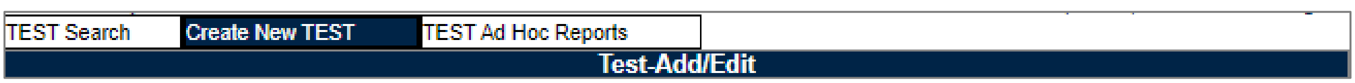


Figure 5.2

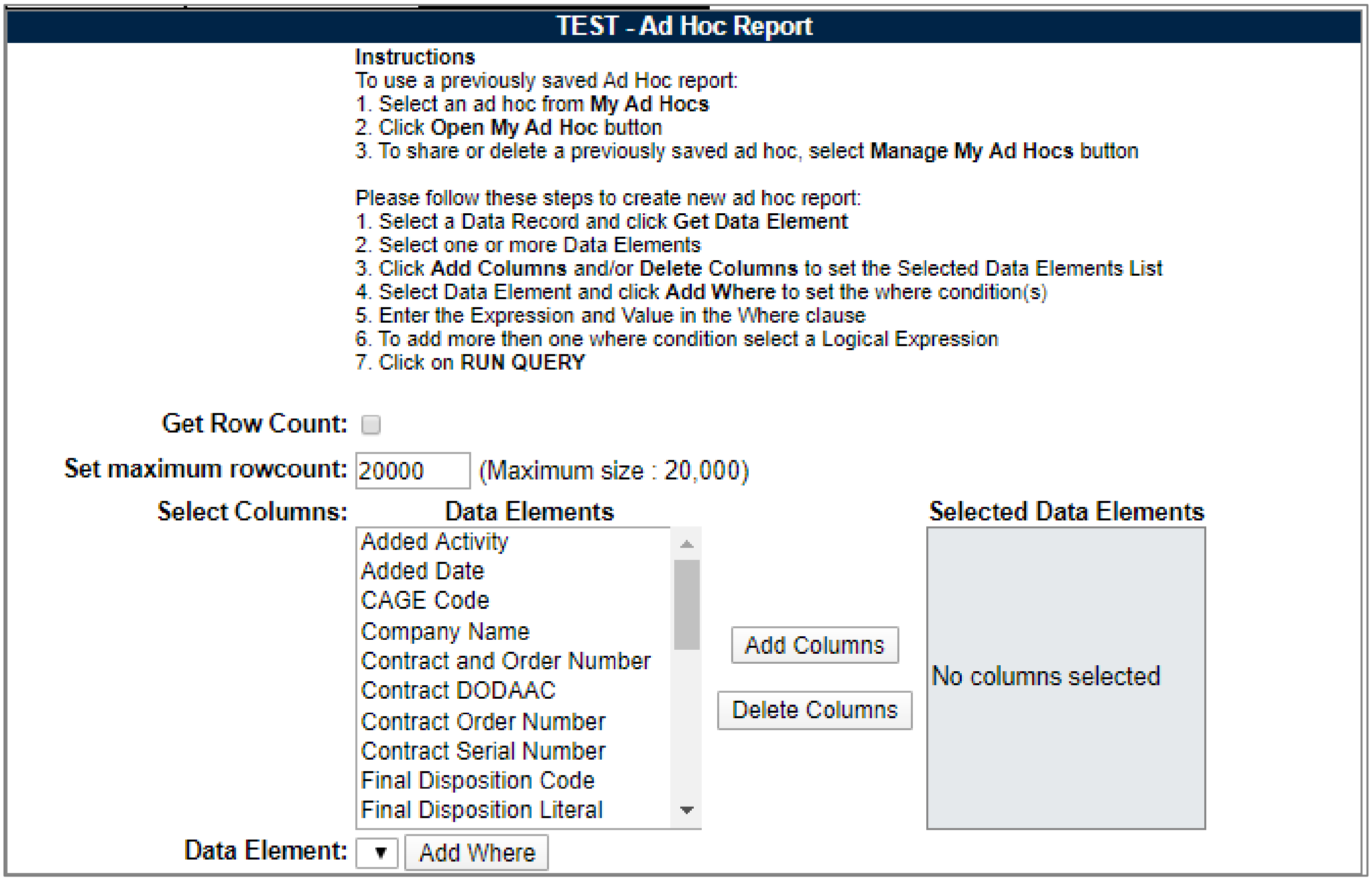


Figure 5.3

5.2 Using the Ad Hoc Report Tool

Please refer to the ADHOC Search User Guide, located in the Guides and Manuals section of the PDREP website for detailed assistance using the Ad Hoc Report tool. https://www.pdrep.csd.disa.mil/pdrep_files/reference/guides_manuals/guides_manuals.htm

The Ad Hoc query generator can be used to generate a variety of reports; all results are downloadable to spreadsheets. On-screen instructions are available as a reminder on how to create an ad hoc query. The user is able to choose the record type to query, select specific data elements from that record, and base the query on criteria like a date range or identifying code used in the record to obtain adjustable, customizable search results.

6 SUMMARY

This concludes the Survey, Special Quality Data (SQD), and Test Records user guide.

Content provided within this document is maintained by the Product Data Reporting and Evaluation Program under the guidance of Naval Sea Logistics Center Portsmouth's Deputy Functional Manager and the Automated Information System Manager.

This user guide is intended to be used as a technical reference document to assist users with system navigation and basic operational functionality within PDREP-AIS. Questions, comments or concerns regarding the Survey, SQD, or Test Records modules or this guide should be directed to the PDREP Customer Support Desk.

Contact us by submitting a help desk ticket either via the "Contact Help Desk" button in the lower right corner of our PDREP website or via the "Help" menu within the PDREP-AIS Application.