

# Survey, Special Quality Data & Test Records Applications User Guide

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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

- Defense Contract Management Agency (DCMA) Guide Book
- <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: <u>https://www.pdrep.csd.disa.mil/</u>

#### **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 <u>Request Access</u> 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:

<u>FAQ</u> – 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.

<u>Guides & Manuals</u> – 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.

<u>Online Training</u> – 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.

A PDREP Product Data Reporting and E	valuation Program
Welcome, USER (BETA) GUIDE	Last Logon: MAR 12, 2020 07:39 AM
Home • Help > APPLICATIONS	User Profile ► • Logout
APPLICATIONS ADMIN Links ►	
Contract Award and Delivery Data (CAD)	
Corrective Action Request (CAR) ►	
Controlled Industrial Material (CIM) Search ►	
Customer Service Request (CSR) ►	
Engineering Referral System (ERS) ►	
Material Inspection Record (MIR)	
Product Quality Deficiency Report (PQDR) ►	
QALI/Letter of Delegation (LOD) ►	
Receipt Inspection Management System (RIMS) ►	
Special Quality Data (SQD) ►	
Supplier Audit Program (SAP) ►	
Supply Action Module (SAM)	
Supply Discrepancy Report (SDR) ► Surveillance Plan (SP) ►	
Survey (Pre/Post Award) ►	
Test Records ►	
Virtual Shelf (VSF)	
Warranty ►	
SEARCHES	
CAGE 🕨	
DODAAC ►	
DUNS ►	
External Links ►	
FSC >	
Level 1/Subsafe Search ► NSN ►	
PDREP Search	
Qualified Product List ►	
Requisition ►	
Routing Identifier Code ►	
Ull Search	
User Search►	
REPORTS	
Contractor Profile	
Material 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**).

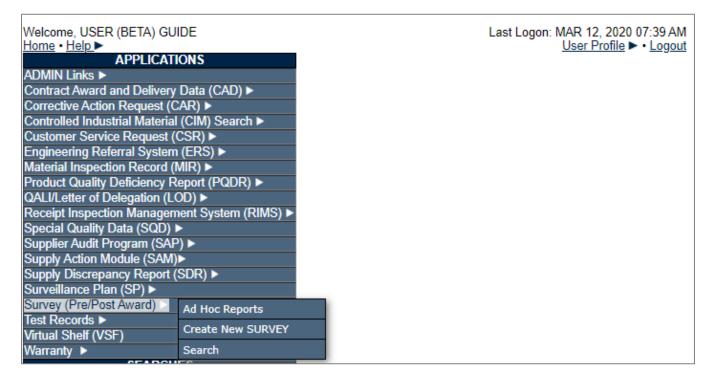


Figure 1.2

# **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**).

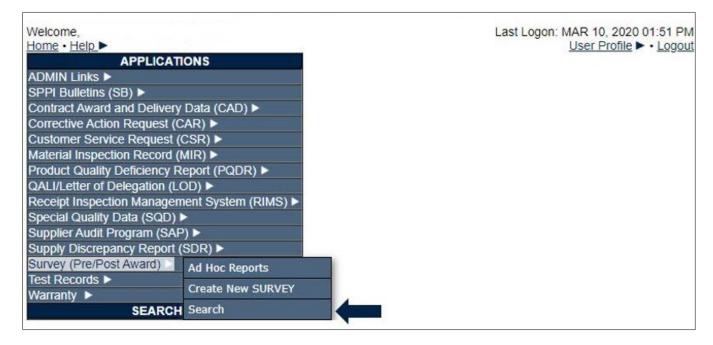


Figure 2.1

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**).

SURVEY Search	Create New SURVEY	SURVEY Ad Hoc Reports				
	Survey - Add/Edit					

Figure 2.2

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

SURVEY Search Create New	SURVEY	SURVE	Y Ad Hoc Re	ports
	Survey R	ecord		
	Instructio			
		a new reco	ord, click on	Create New
	Survey 2 To Sear	ch enter (	locirod nara	meters and click
	Search.	on, enter t	icon cu para	meters and chek
	a. To vie	ew, click o	n the Activit	y - Serial
	Number li			
			e Edit link for	
	c. to de	iete, ciick	the Delete II	nk for the record
Reporting Activity:				
Serial Number:				
CAGE Code:				
Start(Added Date):	03/16/20	19		
End(Added Date):	03/16/20	20		
	Search			

Figure 2.3

- A. Enter the Reporting Activity's six character DODAAC, the company's fivecharacter 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**.

SURVEY Search Create N	ew SURVEY	SURVEY Ad	Hoc Repor	ts			
Survey Record							
Instructions 1. To add a new record, click on Create New Survey 2. To Search, enter desired parameters and click Search. a. To view, click on the Activity - Serial Number link. b. To edit, click the Edit link for the record c. To delete, click the Delete link for the record							
Reporting Activity:	M98820						
Serial Number:							
CAGE Code:							
Start(Added Date):	03/10/2019						
End(Added Date):	03/10/2020						
	Search	-					
Total number of rows: 1 Summary Download: Click <u>here</u> to download data in Microsoft Excel format							
Activity - Serial N	umber	Addeo		Edit	Delete		
<u>M98820200001</u>		03/10/2020		<u>Edit</u>	<u>Delete</u>		

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



- E. To return to the previous screen click the "Back" button.
- F. To print the displayed data, click the "Print" button.

	ATA REPORTING AND EVALUATION P	ROGRAM (PDREP)
<u>Home</u> • <u>Help</u> ►	U	ser Profile: USER (BETA) GUIDE ► • Logout
	Print Back Survey - View Data	
	Date: 03/16/2020	
Report Issue Date: Contractor Assessment Code: Material Level Code: External Control Number: Contract Number: Corrective Action Indicator: Corrective Action Completed Date: Navy Participation Indicator:	190883 CPARS POST-AWARD 09/02/2019 AWARD QA-1, QC-22, LEVEL 1 NON-NUCLEAR 0010001 NO	Added Date: 09/11/2019 Added Activity: Update Date: 09/12/2019 Update Activity:
FSC FSC Material Description 99999 MISCELLANEOUS ITEM Specification MILI1222 Category Cat Reviewed Literal 11 PRODUCTION CAPABILIT	No of Deficiencies	

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.

URVEY Search Create New SURVEY S	URVEY Ad Hoc Reports	
	Survey - A	dd/Edit
	<ol> <li>Enter optional fields, if in 4. To add an FSC, enter the 5. To remove an FSC from 6. To add a Specification, e 7. To remove a Specification 8. To add a Category Revie 9. To edit/delete an existing</li> </ol>	r if Survey Type is Pre-Award formation is known e FSC and click Add FSC the list, highlight the FSC and click Remove FSC enter the Spec and click Add Specification on from the list, highlight the Spec and click Remove Specification swed, click Add Category g Category, click Edit or Delete Elements is MM/DD/YYYY or use Calendar k Save
(M) Reporting/Requesting Activity: (M) CAGE Code: (M) Survey Type: (M) Report Issue Date: (M) Contractor Assessment Code: (M) Material Level Code: External Control Number: Contract Number: (M) Corrective Action Indicator: (M) Navy Participation Indicator: (M) Narrative:	1-PRE-AWARD 1-AWARD 20-FLIGHT CRITICAL (	▼  NAVAIR) 
(M) FSC: Specification:	Add FSC (M) Add Category	Add Specification
	(M) Add Category Save Save & Add att	tachment 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 prepopulated (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.

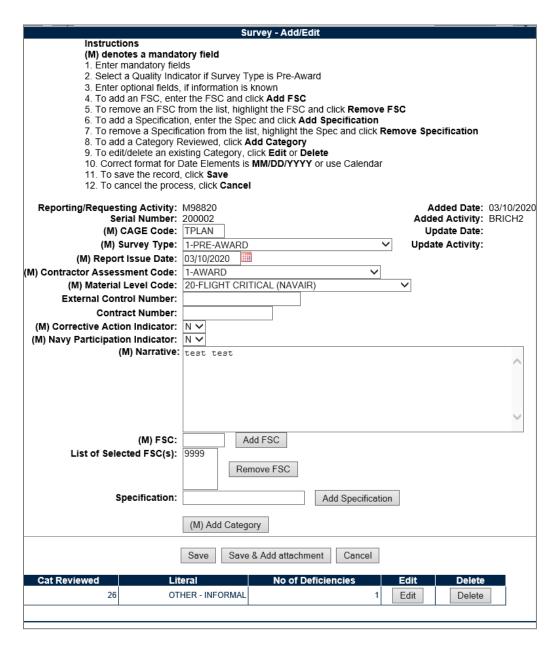


Figure 2.8

- 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**).

	(M) Add Category           Spell Check         Save         Cancel
1. To add a Ca	pory Instructions ategory, select a Category Code from the drop-down list and click the <b>Add</b> button er of deficiency(s) found during the survey (enter zero if none were found but Category was surveyed)
<ol> <li>Click Save</li> <li>To save the</li> </ol>	Category to add the Category to the record Category record, click Save ne process, click Cancel Category Add

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**).

Category Reviewed	Literal	No of Deficiencies		
18	OTHER	0		
Save Category Cancel Category Add				

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



- 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.

Home • Help ►		User Profile: USER (BETA	) GUIDE ► • Logout			
<u></u>	Print Back	<u> </u>	<u>,</u> _ <u>g</u>			
Survey - View Data Date: 03/17/2020						
	Date. 03/11/2020					
Report Issue Date: Contractor Assessment Code: Material Level Code: External Control Number: Contract Number: Corrective Action Indicator: Corrective Action Completed Date: Navy Participation Indicator:	CPARS POST-AWARD 09/02/2019 AWARD QA-1, QC-22, LEVEL 1 NON-NUC 0010001 NO	Added Date: 09/1 Added Activity: Update Date: 09/1 Update Activity:				
FSC FSC Material Description 9999 MISCELLANEOUS ITEM  Specification						
MIL11222						
Category Cat Reviewed Literal 11 PRODUCTION CAPABILIT	No of Deficiencies					
	Attachments					
File Name	File Description	Comments				
docx						
	Delete					

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**).

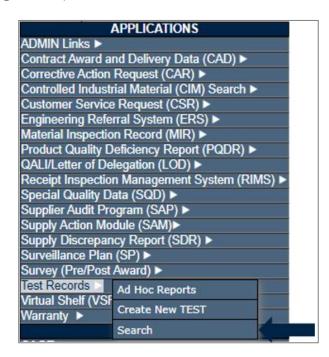


Figure 3.1

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**).

TEST Search Create New 1	TEST Ad Hoc Reports							
Test Record								
Instructions 1. To add a new record, click on Create New TEST 2. To Search, enter desired parameters and click Search. a. To view, click on the Activity - Serial Number link. b. To edit, click the Edit link for the record c. To delete, click the Delete link for the record								
Reporting Activity:								
Serial Number:								
CAGE Code:								
NIIN:								
Start(Added Date):	03/16/2019							
End(Added Date):	03/16/2020							
	Search							

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**.

TEST Search Create Ne	w TEST	TEST Ad H	oc Reports				
Test Record							
Instructions 1. To add a new record, click on Create New TEST 2. To Search, enter desired parameters and click Search. a. To view, click on the Activity - Serial Number link. b. To edit, click the Edit link for the record c. To delete, click the Delete link for the record							
Reporting Activity:	M98820		]				
Serial Number:			1				
CAGE Code:			1				
NIIN:			1				
Start(Added Date):	03/10/2019		_				
End(Added Date):	03/10/2020						
	Search						
Total number of rows: 1 Summary Download: Click <u>here</u> to download data in Microsoft Excel format							
Activity - Serial Number	CAGE Code	NIINFinal	Disposition	Added Date	EditDelete		
M98820200001	TPLAN	ACCE	PT		Edit Delete		

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



- 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**.

		Prin	t Back		
			View Data 03/10/2020		
		Date.	03/10/2020		
Reporting Activity: Serial Number:				Added Date:	
CAGE Code:	200001			Added Activity: Update Date:	
	9999-			Update Activity:	
Issue Date:					
Test Type Code:					
Final Disposition:	ACCEPT				
Contract Number:					
Satisfactory Results Ind:	N				
Material Specification:					
Narrative:	Test				

#### 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.

		Test	t-Add/Edit					
	Instructions (M) denotes a mandatory field 1. Enter mandatory fields 2. Enter optional fields, if information is known 3. Correct format for date fields is MM/DD/YYYY or use Calendar. 4. To save the record, click Save 5. To cancel the process, click Cancel							
Reporting Activity: Serial Number: (M) CAGE Code:			Α	Added Date: 03/16/2020 dded Activity:				
NSN:								
(M) Issue Date:	03/13/2020							
(M) Test Type Code:			T					
(M) Final Disposition:	ACCEPT	-	T					
Contract Number:								
(M) Satisfactory:	Yes v							
Material Specification:		]						
Narrative:	User Guide	I						
	Spell Check	Save	Save & Add attachment	Cancel				

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).

	Test-Add/Edit
	Instructions (M) denotes a mandatory field 1. Enter mandatory fields 2. Enter optional fields, if information is known 3. Correct format for date fields is MM/DD/YYYY or use Calendar. 4. To save the record, click Save 5. To cancel the process, click Cancel
(M) Reporting Activity:	
(M) CAGE Code:	
	(M) FSC_NIIN
NSN:	-
(M) Issue Date:	
(M) Test Type Code:	
(M) Final Disposition: Contract Number:	ACCEPT
(M) Satisfactory:	No V
Material Specification:	
Narrative:	
	Spell Check Save Save & Add attachment Cancel

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.
  - 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.

Home • Help ►		User Profile: <u>USER (BETA) GUIDE</u> ► • Logout
	Print Back	]
	Test - View Dat Date: 03/17/20	
Reporting Activity: Serial Number: 20000 CAGE Code: CPAR NSN: 9999- Issue Date: 03/13/ Test Type Code: FIRST Final Disposition: ACCE Contract Number: Satisfactory Results Ind: Y Material Specification: Narrative: User (	S 2020 'ARTICLE PT	Added Date: 03/16/2020 Added Activity: Update Date: 03/17/2020 Update Activity:
L	Delete	

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 flyout menu (see **Figure 4.1**).

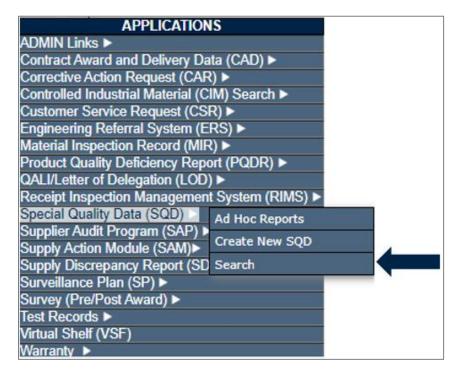


Figure 4.1

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**).

SQD Search	Create New SQD	SQD Ad Hoc Reports	]		
	Special Quality Data - Add/Edit				



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

SQD Search Create New S	OD SQD Ad Hoc Reports							
Special Quality Data								
Instructions								
	1. To add a new record, click on Create New SQD							
	2. To Search, enter desired parameters and click							
	Search.							
	a. To view, click on the Activity - Serial Number link.							
	b. To edit, click the Edit link for the record							
	c. To delete, click the Delete link for the record							
Reporting Activity:								
Serial Number:								
CAGE Code:								
Start(Added Date):	03/16/2019							
End(Added Date):	03/16/2020							
	Search							

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**.

SQD Search Create New S	QD	SQD Ad Hoc Repor	ts				
Special Quality Data							
Instructions 1. To add a new record, click on Create New SQD 2. To Search, enter desired parameters and click Search. a. To view, click on the Activity - Serial Number link. b. To edit, click the Edit link for the record c. To delete, click the Delete link for the record							
Reporting Activity:	N65726		]				
Serial Number:			1				
CAGE Code:			1				
Start(Added Date):	03/16/20	019 🛄	_				
End(Added Date):	03/16/20	020 🛄					
	Search						
Total number of rows: 1 Summary Download: Click <u>here</u> to download data in Microsoft Excel format							
Activity - Serial Numb		Added Date	Edit	Delete			
N65726200009		03/16/2020	Edit	Delete			

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	<u>Edit</u>	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.

	PRODUCT DATA REPOR	TING AND EVALUATION PROGRAM (PDREP)	
<u>Home</u> • <u>Help</u> ►		User Profile: USER (BETA)	GUIDE ► • Logout
		Print Back	
	Speci	al Quality Data - View Data	
		Date: 03/16/2020	
Reporting Activity: Serial Number: CAGE Code: Issue Date: Completion Date: Narrative: us	200009 CPARS 03/11/2020 03/12/2020	Added Date: 03/16/2020 Added Activity: Update Date: Update Activity:	
FSC FSC COMMODI 9999 MISCELLANEOUS			

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:		Added Date: 03/16/2020	
Serial Number:	200009	Added Activity:	
(M) CAGE Code:	CPARS	Update Date:	
(M) Issue Date:	03/11/2020	Update Activity:	
Completion Date:	03/12/2020		
(M) Narrative:	user guide	<u>//</u>	
(M) FSC:	Add FSC		
	9999 A Remove FSC		
	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).

Home • Help ►		User Prof	ile: USER (BETA) GUIDE >	Logout	
SQD Search	Create New SQD	SQD Ad Hoc Reports	]		
	-	Special Quality D	ata - Add/Edit		
		Instructions (M) denotes a mandatory field 1. Enter mandatory fields 2. Enter optional fields, if information 3. To add an FSC, enter the FSC at 4. To remove an FSC from the list, 5. Correct format for Date Element 6. To save the record, click Save 7. To cancel the process, click Car	nd click Add FSC highlight the FSC and click s is MM/DD/YYYY or use (		
(M) R	eporting Activity: (M) CAGE Code:				
	(M) Issue Date:				
	Completion Date:				
	(M) Narrative:				
	(M) FSC:	Add FSC Spell Check Save Sa	ve & Add attachment	Cancel	

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.
  - 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.

<u>Home</u> • <u>Help</u> ►	User Profile: USER (BETA) GUIDE ► • Logout
	Print Back
	Special Quality Data - View Data
	Date: 03/17/2020
Reporting Activity: Serial Number: 200009 CAGE Code: CPARS Issue Date: 03/11/2020 Completion Date: 03/12/2020 Narrative: user guide	Added Date: 03/16/2020 Added Activity: Update Date: Update Activity:
FSC FSC COMMODITY 9999 MISCELLANEOUS ITEM	Delete

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.

Test Records > Virtual Shelf (VSF	Ad Hoc Reports	
Warranty	Create New TEST	
	Search	

Figure 5.1

TEST Search	Create New TEST	TEST Ad Hoc Reports				-
Test-Add/Edit						

Figure 5.2

TEST - Ad Hoc Report			
Instructions To use a previously saved Ad Hoc report: 1. Select an ad hoc from My Ad Hocs 2. Click Open My Ad Hoc button 3. To share or delete a previously saved ad hoc, select Manage My Ad Hocs button			
Please follow these steps to create new ad hoc report: 1. Select a Data Record and click Get Data Element 2. Select one or more Data Elements 3. Click Add Columns and/or Delete Columns to set the Selected Data Elements List 4. Select Data Element and click Add Where to set the where condition(s) 5. Enter the Expression and Value in the Where clause 6. To add more then one where condition select a Logical Expression 7. Click on RUN QUERY			
Get Row Count:			
Set maximum rowcount:	20000 (Maximum size : 20,000)		
Select Columns:	Data Elements	Selected Data Elements	
	Added Activity Added Date CAGE Code Company Name Contract and Order Number Contract DODAAC Contract Order Number Contract Serial Number Final Disposition Code Final Disposition Literal	No columns selected	
Data Element:	Add Where		

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.