Product Data Reporting and Evaluation Program (PDREP)

Engineering Referral System (ERS)

User Guide

01 June 2019
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*Hold the “CTRL” key and click on paragraph to follow link.
FOREWORD

This guide does not replace or amend any Department of Defense (DoD) instructions, regulations, and/or policies. The Product Data Reporting and Evaluation Program’s (PDREP) Engineering Referral System (ERS) application is designed to work in concert with existing DoD and Navy policies and processes. Its purpose is to assist users with the functionality of the PDREP-ERS application and to facilitate compliance with DoD and Navy material deficiency documentation and resolution policies.

Refer to the appropriate Engineering Referral (ER) process instructions, and/or additional manuals for more information about ERS program processes and requirements.

!!!ATTENTION!!!

The sample data used in this document is not real. It is data from a test system and must not be used for actual business purposes.

Throughout this user guide the term ERS will be in reference to the application program, the term ER will refer to the records that are produced within this application.

REFERENCES

2. SECNAVINST 4855.3 - Product Data Reporting and Evaluation Program (PDREP)
3. NAVSO P3683 - Navy and Marine Corps Product Data Reporting and Evaluation Program (PDREP)
4. CNMM Volume IV Chapter 1 – Engineering Referrals and Product Quality Deficiency Reports
INTRODUCTION

This document is intended to guide Navy personnel in the use of the Product Data Reporting and Evaluation Program-Automated Information System (PDREP-AIS)-Engineering Referral System (ERS) application. ERS is used to create and process Engineering Referral (ER) records which allow inspection activities to document and request engineering disposition for deficient material.

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

First time PDREP users will need to submit a User Access request form, available on the NSLC home page. Click on User Access Request Form to for detailed instructions on filling out an access request form. Follow any additional directions on the form itself to submit the request for access to the PDREP team.

Existing PDREP users can submit an access change request. To do this, log into the PDREP-AIS and hover over ‘[Your Name]’ in the upper right corner of the page and click the sub-link ‘Access Change Request’. Update access request as desired. Enter a narrative to describe your change request and click submit account change request button.

Requests for assistance, improvement, or changes to any of the PDREP applications or the NSLC Detachment Portsmouth PDREP home page should be submitted to:

Online in the PDREP Application

If you're already a PDREP User, log on to PDREP: https://www.pdrep.csd.disa.mil/
Hover over “Help” at the top of the home page. Select the first option for the Help Desk.

If you wish to provide suggestions to change ERS or other PDREP-AIS modules, from the same Help menu, select the “Suggest a Change” option. The Feedback form will open. Instructions for completion are located at the top of the form.

Also, visit our FAQ Page – your question(s) may be easily answered there.

Customer Support Desk

Commercial Phone: (207) 438-1690 / DSN 684-1690
FAX: (207) 438-6535 / DSN 684-6535
E-Mail: WEBPTSMH@navy.mil

Mailing Address

Naval Sea Logistics Center Portsmouth
Bldg. 153, 2nd Floor
Portsmouth Naval Shipyard
Portsmouth, NH 03804
1 ACCESS LEVELS

Access to the functionality of the ERS is determined by the User’s Access Level. PDREP has several Access Levels for ERS. Creation of records are DoDAAC specific, in that, the user can only create records associated with their DoDAAC. For specific access levels see Table 1.1.

<table>
<thead>
<tr>
<th>Role</th>
<th>Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Access</td>
<td>If a user does not have access to the PDREP-ERS application, the program link will not appear on the user’s PDREP Main Menu.</td>
</tr>
<tr>
<td>Originator</td>
<td>No Access: No access to the application&lt;br&gt;View Access: Read only access&lt;br&gt;Non-Management Access: Access to records that have been created by the user&lt;br&gt;Management Access: Access to records created by the user and records created at the user’s DoDDAC&lt;br&gt;Full Access: Program Administrator</td>
</tr>
<tr>
<td>Screening Point</td>
<td>No Access: No access to the application&lt;br&gt;View Access: Read only access&lt;br&gt;Non-Management Access: Access to records that have been created by the user&lt;br&gt;Management Access: Access to records created by the user and records created at the user’s DoDDAC&lt;br&gt;Full Access: Program Administrator</td>
</tr>
<tr>
<td>Action Point</td>
<td>No Access: No access to the application&lt;br&gt;View Access: Read only access&lt;br&gt;Non-Management Access: Access to records that have been created by the user&lt;br&gt;Management Access: Access to records created by the user and records created at the user’s DoDDAC&lt;br&gt;Full Access: Program Administrator</td>
</tr>
</tbody>
</table>

Table 1.1
2 NAVIGATING TO AN ER RECORD

Once the user has logged in, the PDREP Home page will display as shown in Figure 2.1. depending on the user’s access level not all of the options may be listed.

*Please refer to the PDREP User Access Request and Login Procedures user guide.

*NOTE: After May 2018 PDREP update, a list of recently accessed records will appear on the right-hand side of the PDREP main menu if records have been viewed, edited, or created within the last 24 hours.
2.1 Finding The Fly Outs

Hover your mouse pointer over any PDREP Application (also referred to as “Modules”) located on the upper left portion of the screen and a list of fly out hyperlinks for that application will appear (See Figure 2.2). Note that users with NNPI Access will have to first click “Engineering Referral System (ERS)” to swap over to the NNPI side of PDREP.

2.2 Selecting The Fly Out

Selecting either of the hyperlinks will allow the user to go directly to that page within the application.

*NOTE: For Prime Contractor Action Points (Including Nuclear CDAs), please see Section 9 regarding Prime Contractor access to ERS.

2.3 ERS Worklist

The ERS Worklist page is used to filter the list of ERs based on access role, status, DoDAAC, and User Code.

A. Accessing The ERS Worklist

1. To access ERS Worklist select the ERS Worklist hyperlink from the Engineering Referral System (ERS) fly out options (See Figure 2.3).
2. If already working in the ERS module the user may access the ERS Worklist screen by selecting the *ERS Worklist* tab (See Figure 2.4)

![PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)](image1)

**Figure 2.4**

3. Whether which option is used, the ERS worklist page will display (See Figure 2.5).

![PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)](image2)

**Figure 2.5**

---

**B. Worklist Settings**

The Worklist settings will default as shown in Figure 2.5, with the Activity set to your primary DODAAC and the User Code set to your PDREP User ID. Under “Show Worklist For”, select the desired role; ORIGINATOR, SCREENING POINT or ACTION POINT.
If you want to see only ERs currently assigned directly to you, click Display Standard Worklist button. If you want to see all ERs assigned to your activity (DoDAAC) then you may remove your User Code and then click Display Standard Worklist button.

1. The Status setting of “CURRENT WORKLIST” will return only ERs currently assigned to the role selected. Other available statuses include:
   i. **ALL**: Returns all ERs assigned to the designated activity and/or user code that require disposition, whether the resolution is active or already completed and whether the ER is open or closed.
   ii. **OPEN**: Returns all ERs assigned to the designated activity and/or user code that require disposition, whether the resolution is ongoing or already completed but where the ER has not yet been closed by the Originating Point.
   iii. **CLOSED**: Returns all ERs previously assigned to the designated activity and/or user code for disposition but where the ER has been closed by the Originating Point.

2. The date range for the Worklist defaults to the present date minus three years but can be changed if needed. The Worklist can also be sorted by a variety of criteria but defaults to listing ERs in ascending order by the date on which the ER was first entered into PDREP.

3. The Worklist can also be run for a specific team by entering the designator for that team in Organization Code. The results will include any ERs currently assigned to a PDREP user for action whose user profile contains the exact Organization Code specified in the search.

4. When you have selected the criteria, click Display Standard Worklist to view all ERs matching the criteria entered. The Worklist results will appear as in Figure 2.6.
5. The search results include the following fields.

**CAT (Category):** The category (I or II) of the ER. Category I ERs will be identified in red.

**Received:** The date when the ER was received by the current work level, i.e. Originator, Screening or Action Point.

**History & Correspondence:** Click the “View” link in this column to open a new window containing correspondence and forwarding history for this ER.

**RCN (Report Control Number):** Click the RCN in this column to open the Base ER page, it will display the page at the ER’s current level of action. This is the page from which most tasks will be performed.

**View PDF:** Click “PDF Report” link in this column to view the ER PDF for the subject RCN in a new window.

**NSN/LSN (National or Local Stock Number):** The NSN/LSN for the item reported deficient. The NSN/LSN may have as many as four separate components:

- **COG:** (Optional) Two-character Cognizance Symbol of the deficient item. When used, the COG identifies the inventory manager for the deficient item.
- **FSC:** (Required) Four-digit Federal Supply Class of the deficient item.
- **NIIN:** (Optional) Nine-digit National Item Identification Number of the deficient item.
SMIC: (Optional) Two-character Special Material Identification Code for the deficient item. When used, the SMIC identifies items requiring stricter controls to ensure technical integrity (e.g. Level 1, CIM, or Navy Nuclear).

*NOTE: Local Stock Numbers will appear here without a hyperlink.*

**Nomenclature:** Item description associated with the NIIN.

**Contact/Phone:** The name and telephone number (if provided) of the point of contact who forwarded the ER to the current Work List level.

**Last Action:** Displays the last forwarding, release or closure action performed on the ER.

**Last Corr Date:** Displays the date of the last correction was completed on the ER.

**Last Corr From:** Displays the Userid associated with who completed the last correction.

**Status:** Displays the current ER status.

**Days Overdue:** This value is based on the “Show Worklist For” level selected. For the Action Point level, this displays the relationship between the current date and the Action Point Due Date. A negative number, e.g. -30 indicates the number of days remaining until the current due date. A positive number, e.g. 10 indicates the number of days past the current due date. A blank in this column indicates either that no date has been set or that the current due date is today.

**Delete:** Click the Delete link to delete a draft ER. This link only appears while the ER is in draft status.

C. Personalized ER Worklist

Worklists may be created based on specific data elements that return specialized data. They work similarly to PDREP Ad Hoc reports found in other modules but with the advantage of having direct hyperlinks to each record pulled as part of the query, allowing for users to set up worklists with more specificity than the Standard Worklist.

1. To create a personalized ER Worklist, click Create New Worklist (See Figure 2.7).
2. After selecting Create New Worklist select the desired Data Elements for the Worklist (See Figure 2.8)
3. Selecting of Data Elements:
   i. Selecting one Data Element will give you only the results on that individual element.
   ii. Multiple Data Elements may be selected in the column together by using the CTRL or Shift key.
   iii. Once Data Elements have been selected, click Add Columns to move them to the Selected Data Elements box. Data Elements can be removed from the Selected Data Elements box by selecting them and clicking Delete Columns (See Figure 2.9).

![ERS Ad Hoc Report](image)

*Figure 2.9*

iv. Data Elements can be prioritized in the Selected Data Elements box by selecting data element and using the Up and Down arrows to the right of the box.

v. Data Elements in the drop down next to the Add Where button can be used to filter the query return. The more elements used the more defined the query will be.

vi. After the Data Elements have been selected. Select the appropriate expression and enter a value to retrieve desired report results (See Figure 2.10).
vii. The Reset button will clear the Selected Data Elements and the Add Where values and expressions.

viii. Click the Run Query button. The query results displayed in Figure 2.10 are the results of the query created from Figure 2.9. All queries will be displayed with the RCN being a hyperlink to the record. The Query can be downloaded to Microsoft Excel by clicking the “here” hyperlink. The query may be saved to the user’s profile by clicking the Save ERS Ad Hoc to Profile button (See Figure 2.11).
ix. Clicking the Save ERS Ad Hoc to Profile button will display the Save to Profile screen. Enter the report title in the Report Title data field and click the Save to Profile button (See Figure 2.12)

![Figure 2.12](image)

x. After saving a query to your profile the ERS Ad Hoc report page will allow the user to open or manage their saved queries. To open a saved query, select the query from the drop down list in My Ad Hocs then click Open My Ad Hoc button. (See Figure 2.13)

![Figure 2.13](image)

D. Managing My Ad Hoc

An Ad Hoc report may be deleted by checking the check box and clicking the Delete button at the top of the check box column (See Figure 2.14)
E. Sharing My Ad Hoc

1. An Ad Hoc report may be shared with other users at your activity or at another activity by clicking the title hyperlink. After clicking the hyperlink, the Send Message page will be displayed (See Figure 2.15).

2. Select the activity from the Choose Activity drop down list as shown in Figure 2.15.

3. After selecting the activity, a list of users from the activity will appear in the To PDREP User drop down list. Select the user, then click the Share Ad Hoc button to share the report.

2.4 ERS Base Page Additional Tools/Functionality

A. Choose Level

The links in the Choose Level section of the ER Base Page provides a hyperlink to the specific roles associated with ERS module. Selecting the role will open the ER page for that role.
B. **Quick Views**

The links in the Quick Views section of the ER Base Page provide a way to quickly review the various forms associated with a ER as follows:

1. **View Report (PDF):** Displays the ER Report in a new window as an Adobe Acrobat PDF document. This PDF version is representative of the paper report and is suitable for printing.

2. **View Remarks (PDF):** Displays the Remarks Sheet in a new window as an Adobe Acrobat PDF document. This PDF version is representative of the paper remarks sheet and is suitable for printing.

3. **View Points of Contact:** Displays all points of contact assigned to date who may be participating in the ER investigation. This will include the Originator, Screening and Action individuals.

4. **History:** Displays a comprehensive history of all forwarding actions and correspondence to date for the subject ER. The text of all e-mail messages will display on the History page.

C. **Attachments**

Files of various types that support the ER or the investigation can be attached to a ER in PDREP. Click the View/Upload files link to see any files that have been attached to the ER to date. The number of currently attached files will appear in parentheses. To attach new files, click the View/Upload Files link and then click Add Attachments and follow the instructions on the page. For detailed instruction see Section 3.3.A.3. The maximum file size for any single attachment is **25 megabytes**. Attachments that are classified as U-NNPI may be uploaded in ERS.

D. **Home**

Clicking the Home hyperlink will bring the user directly to the PDREP Home page.

E. **Help**

Hover over the “Help” hyperlink located in the upper left corner on all PDREP screens and a list of help options for PDREP will appear (See **Figure 2.16**).
F. User Information

Hover your mouse pointer over the User Profile hyperlink located on the upper right portion of the screen and a list of options for the User Profile will appear. Selecting any of the options will allow the user to go directly to that page within the User Profile.

G. Session Tracking

Session tracking maintains a record of all RCNs viewed during the current login session. It also allows the User to quickly switch between records by selecting the linked RCN.

3 ORIGINATION POINT

3.1 Initial Record (ER) Creation

The most common originator task is to create a new ER in ERS.

A. Accessing Create New ERS Screen

1. To access Create New ER either select the Create New ERS hyperlink from the fly out options from the Engineering Referral System (ERS) application link on the PDREP main menu (See Figure 3.1).

![Figure 3.1](image)

2. If already working in the ERS module the user may access the Create New ERS screen by selecting the Create New ERS tab (See Figure 3.2)
3. Whether which option is selected, the Create New ERS page will display (See Figure 3.3).
B. Create New ER Screen

Enter initial data (See Figure 3.4).

1. An (M) by any data field indicates it is a mandatory field.

2. The fields in the Create New ER tab are described as follows.

   (M) RCN - Enter a record control number (RCN); the system suggests the next available RCN for your DoDAAC. The RCN consists of your reporting activity DODAAC, Year, and Serial Number. These three fields are auto-filled, but can be changed. As a reference, the last RCN used by the reporting activity and the individual are listed. RCNs may only be used once. Typically, users start RCN serial numbering sequences with serial number ‘0001’ when there are no previous RCNs for the current year in PDREP.

   Requisition Number – The requisition number is optional, but is highly suggested as it is required to receive credit for the deficient material later on if necessary. Enter the 14-character Requisition Number and when the Requisition Number has a Suffix; enter the Suffix as the 15th character at the end of the Requisition Number. The Requisition Number field also assists in auto-populating data on the Product Quality Deficiency Report (PQDR).

   FSC and NIIN fields are optional on this page; however, FSC and NIIN are mandatory fields when completing the ER form. The FSC and NIIN also assist in auto filling additional data fields in the ER.

   DoD Unique Item Identifier (UII) is an optional field. Item unique identification is a DoD requirement that enables life cycle traceability. All UIIs are maintained in the DoD’s Item Unique Identification (IUID) Registry Database which is external to PDREP. To add a UII, type, cut and paste, or
scan the 2D barcode(s) of material being reported into the DoD Unique Item Identifier field. PDREP will verify the UII with the IUID Registry to ensure only valid UIIs are entered into the ER and that other similar markings or barcodes cannot be entered.

i. To add a UII manually, select the Manual Entry radial button and enter the UII into the “DoD Unique Item Identifier” field, then click the Add UII button.

ii. To add an UII using a scanner, select the Scan Barcodes radial button, and then scan the 2D barcodes on the material or associated supply documentation.

iii. If the scanned UIIs are not contained in the DoD IUID Registry, the system will notify you and request you to correct or remove the incorrect UIIs.

iv. There may be many barcodes on supply documentation, boxes, and material. So it is quite possible to scan incorrect marks that are not UIIs. This why UII must be verified by PDREP prior to permitting them to be added to any PDREP record.

3. Click the Create New ER button to create ER (See Figure 3.5).

4. The ER will be auto-populated based on the Requisition Number, FSC-NIIN, and/or any UII information provided. Please be patient as the system verifies the UIIs and auto-fills the new record.

C. Alternate Ways of Accessing Create New ERS

1. Through a Receipt Inspection Management System (RIMS) (See Figure 3.6) See the RIMS user guide found here for additional information.
3.2 Creating an ER

It is extremely important to provide as much information as is available about any deficiency. Mandatory fields in ERS are marked with (M) and some additional fields may be required depending upon entries into other fields. Some mandatory fields in ERS correspond with mandatory fields in PQDR, without the information in these fields, it may be impossible to conduct a thorough investigation later in the process. The end result of not providing the information may be recurrence of preventable defects, lack of credit or replacement for deficient items and potential failures of critical materiel after installation.

A. ERS Originator Data Fields

The Create New ERS screen (See Figure 3.8, Figure 3.9. Figure 3.10 and Figure 3.11).
Figure 3.10
Recommended Purge and Inspection of:
Supply System and End-User Held Stock

Effect on Installed Material:

Recommended Changes to Prevent

Technical Ordering Data:

Government Source Inspection:

Suggested corrective action for items currently in Navy:

End service use if NSN is Not (1H) or (x) "Entry not applicable for vendor procured material":

Originator Point Correspondence:  

Figure 3.11
B. Explanation of the Originator Data Entry Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category:</td>
<td>This defaults to CAT II. Category I is defined as a product condition or deficiency which may cause death, injury, or severe occupational illness, loss or major damage to a ship’s system, or directly restrict combat readiness capability. Category II is defined as a product condition that does not meet the criteria for Category I. When CAT I is selected a Category I Justification is required. Justification should be entered on the Remarks Sheet.</td>
</tr>
<tr>
<td>SAM Number:</td>
<td>May auto-populate, if the ER is being created directly from a SAM record, otherwise enter the SAM serial number.</td>
</tr>
<tr>
<td>Report Control Number:</td>
<td>The RCN consists of the 6 character DoDAAC of the originating activity, the 2-digit year, and a four-digit serial number. Each ER must have a unique RCN; no duplications are allowed. The page displays the last RCN created by you for your current activity, and by your activity’s DoDAAC.</td>
</tr>
<tr>
<td>MIR Serial Number:</td>
<td>May auto-populate, if the ER is being created directly from a RIMS record, otherwise enter the MIR serial number.</td>
</tr>
<tr>
<td>Added Date:</td>
<td>This is the automatically generated date of when the record is created.</td>
</tr>
<tr>
<td>Originator Release Date:</td>
<td>This is the automatically generated date of when the record is sent to the Screening Point.</td>
</tr>
</tbody>
</table>

*NOTE: This date will continue to automatically generate the current date until the record is submitted to the Screening Point.*

Originator Received Date: The date the Originator received the record back from the Screening Point.
2. **Figure 3.13 Data Fields**

   **(M) From:** The SYSCOM Field defaults to the SYSCOM value of the originating activity’s DoDAAC and can be edited, if needed. The activity name, address, city, state, and ZIP will default to the address for the activity (DoDAAC) in your User Profile.

   **(M) Originator Name, Phone Number & Email Address:** These will default to the information in your User Profile, but can be changed if you are entering a ER on behalf of another Originator.

   *NOTE: You may select to use the Originator’s Profile address as Originator Address if the box below the Originator Name, Phone Number & Email Address fields are selected. If you have a different physical address in your User Profile than the default for the DoDAAC you may check “Use Originator’s Profile address as Originator Address” and use the address from your User Profile instead.*

3. **Figure 3.14 Data Fields**

   **Priority:** Priority selections are designated to assist in determining the order in which to work the records. This is done by selecting the corresponding priority from the Priority Drop Down or may be auto-populated from the SAM or RIMS record the ER is being created from. See **Appendix 2** for explanation of the priority codes.
4. **Figure 3.15** Data Fields

   **(M) Date Deficiency Was Discovered:** Defaults to the current date but can be edited.

   **(M) Material Received Date:** Date that the material was received

   **Need by Date:** Is set and determined by the user. It is the date the material is expected to be needed for use. It is not the date of an expected reply. This field is not mandatory and can remain blank.

   **Deficient Item National Stock Number (NSN):** The NSN is made from the COG, FSC (Federal Supply Class), NIIN (National Item Identification Number) and SMIC (Special Material Identification Code, used by Navy only). Can be auto-filled from the NIIN but can also be edited. At a minimum an FSC and NIIN must be supplied in order to process a ER. Local Stock numbers are conditionally mandatory when a LSN is supplied it removes the mandatory requirement for a NIIN to be entered. The Lookup FSC button is a link to FSC Search that allows the user to research the FSC codes.
5. **Figure 3.16 Data Fields**

**M) Material Level Code:** Select the appropriate Material Level Code (sometimes referred to as “QA Code”) of the material from the drop down list.

**M) Deficient Item Nomenclature:** Auto-fills based on the NIIN (or FSC if NIIN not filled in) and may be edited if necessary.

**Deficient Item Part Number:** Enter if known.

**Quantity:** **(M) Received, Inspected, (M) Deficient, In Stock:** Enter the quantities received, inspected, deficient and remaining in stock (e.g. the number of items from the same batch or lot currently in inventory from the same contract or manufacturer/supplier, if known).

*NOTE: Only the amount Received and the amount Deficient are a mandatory field.*

**DOD Unique Identification Identifier (UII):** Enter the UII here if the deficient item has a government-issued Unique Item Identifier (UII). See **Section 3.1.2** for instructions regarding DoD UII.

**M) Item:** Select whether the deficient item is New, Overhauled, Repaired, or Unknown.

**Repairable Item:** Select Yes, No, or Unknown.

**Requisition/Document Number:** Enter if known or check the box to indicate not provided/unknown. This will be populated by the information entered on the create ER screen if it was provided.

**Requisition Quantity:** The specific amount requisitioned or requested.
6. **Figure 3.17 Data Fields**

*(M) Contract Number, Delivery, Contract Line Item No and Order Number:* Enter if known, or check the box to indicate not provided/unknown. If not provided/unknown is checked, no additional fields in this box are required.

*NOTE: After clicking the Save Contract button the screen will display as shown in Figure 3.18 with added capability to add additional contracts or edit or delete the contract information.*

![Figure 3.17 Data Fields](image)

---

**Contract Units Received:** Enter the number of items received from the contract listed.

---

*Figure 3.18*
Unit of Measure: Select the unit (e.g. EA-Each, LO-Lot, etc.) in which the item is issued. This will also be automatically filled if a valid NIIN was provided.

Serial Number: If a serial number was supplied with the material then enter it here. If needed, fields will be added for additional numbers (See Figure 3.19).

Lot/Batch Number: If a lot or batch number was supplied with the material then enter it here.

Lot/Batch Number Type: Choose whether the number (if any) supplied is a Batch, Lot, Serial or Heat number.

Purchase Order Number: Enter if known and applicable. If needed, fields will be added for additional numbers.

Technical Data Package (TDP) or Individual Repair Part Ordering Data (IRPOD) Revision: IRPOD revision or TDP specified in the contract

Vendor CAGE Code: Enter if known or click the Lookup button. This should be the CAGE of the vendor or repair facility that supplied the deficient item. The Lookup button provides a search tool to find the CAGE if the name of the Vendor is known, Section 3.3 has detailed instructions for the Lookup button.

Manufacturer CAGE Code: Enter if known or click the Lookup button. This should be the CAGE of the manufacturer of the deficient item. The Lookup button provides a search tool to find the CAGE if the name of the Manufacturer is known, Section 3.3 has detailed instructions for the Lookup button.

Look Up: CAGE codes utilized in the application are validated against the PDREP database. The Lookup button allows the user to lookup vendor information either by CAGE Code or vendor name. Partial searches are supported. Further functionality of the Lookup CAGE Code page is described below.

i. Click the Lookup button on the ERS contract section. The Lookup Code page displays (See Figure 3.20).
ii. Enter a CAGE Code or a Vendor name and click the search button. A list of results displays (See Figure 3.21).

iii. To transfer the CAGE information to the Engineering Referral Record – Create New ERS page, click the Select CAGE Code button. The application will redirect to the Engineering Referral Record – Create New ERS page and the Vendor data associated with the CAGE Code will transfer (See Figure 3.22).
7. **Figure 3.23 Data Fields**

**(M) Government Furnished Material:** Select whether the deficient item was furnished by the government to a contractor for use in the contractor’s manufacturing or assembly process.

**Current Disposition of Deficient item (the Exhibit):** Defaults to H- Holding. This can be changed if needed but in most cases if an investigation is expected then the Originator is directed to hold the deficient item(s) pending an exhibit request. For selection choices see [Table 3.1](#).

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>Disposed or Destroyed</td>
</tr>
<tr>
<td>H</td>
<td>Holding Exhibit</td>
</tr>
<tr>
<td>O</td>
<td>Other</td>
</tr>
<tr>
<td>R</td>
<td>Repaired</td>
</tr>
</tbody>
</table>

**Table 3.1**

**Action Requested:** Select a code that best describes your expectations/recommendation for the handling of this ER for a list of codes see [Table 3.2](#).

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>Credit</td>
</tr>
<tr>
<td>E</td>
<td>Replacement</td>
</tr>
<tr>
<td>O</td>
<td>Other</td>
</tr>
<tr>
<td>R</td>
<td>Repair</td>
</tr>
</tbody>
</table>

**Table 3.2**

**(M) Status:** Defaults to A-ACTIVE. This can be changed. If the ER is for Information Only, the status should be set to AI for a list of status codes see [Table 3.3](#).
### Table 3.3

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Active</td>
</tr>
<tr>
<td>AI</td>
<td>Information</td>
</tr>
</tbody>
</table>

**Deficiency Type:** From the drop down list select the deficiency type, for the list of deficiency types see **Table 3.4**.

### Table 3.4

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Bulk Receipt Inspection</td>
</tr>
<tr>
<td>B</td>
<td>X2 Receipt Inspection</td>
</tr>
<tr>
<td>C</td>
<td>X4 Receipt Inspection</td>
</tr>
<tr>
<td>D</td>
<td>Waterfront</td>
</tr>
<tr>
<td>E</td>
<td>System</td>
</tr>
<tr>
<td>F</td>
<td>Vendor</td>
</tr>
</tbody>
</table>

**Figure 3.24**

8. **Figure 3.24** Data Fields

**Defective Material Attribute:** Select from the drop down list the inspection attribute that has caused the material to be defective.
QTY DEF: Enter the quantity defective based on the selected Defective Material Attribute.

(A) Technical Description of the Deficiency: Give a description of the defect. Determine type and extent of information required. Do not list “as is” dispositions. Provide acceptability of material/disposition instructions. If a sketch or photograph is required attach it to the ER using Add Attachment functionality described in section

(B) Basis for rejection or validation of the deficiency: Give specific reason for rejection. Including specific observed violations of drawings, specifications, regulations, instructions, or contracts.

*NOTE: After clicking the Save Attribute button the screen will display as shown in Figure 3.25 with the capability to add additional attributes or edit or delete the attribute information.
(M) Condition of Packaging: Select from the drop down list the condition of the packaging for a list of conditions see Table 3.5.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>New</td>
</tr>
<tr>
<td>B</td>
<td>Good</td>
</tr>
<tr>
<td>C</td>
<td>Fair</td>
</tr>
<tr>
<td>D</td>
<td>Poor</td>
</tr>
</tbody>
</table>

Table 3.5

(M) Condition of Packaging Narrative: Enter a specific description of the condition of the packaging.

(M) Label Markings: Enter the specific label markings present.

(M) Material Markings: Enter the specific material markings present.

Originator Miscellaneous Notes: Add additional notes that will assist in the investigation.
Recommended Purge and Inspection of:
Supply System and End-User Held Stock

Effect on Installed Material:

Recommended Changes to Prevent
Technical Ordering Data:

Government Source Inspection:

Suggested corrective action for items currently in Navy:

End service use if NSN is Not (1H) or (x) "Entry not applicable for vendor procured material":

Figure 3.27

10. **Figure 3.27 Data Fields**

**Recommended Purge and Inspection:**

**Supply System and End User Held Stock:** Suggest which stock needs to be purged or inspected based on the supply program (SY, Navy Supply, etc.). Provide justification for not purging when the deficiency is valid.
Effect on Installed Material: Explain why installed material may be a safety concern, provide required actions if the material needs to be replaced.

Recommended Changes to Prevent:

Technical Ordering Data: If required: provide any suggested changes to Drawing requirements or if a revision is required for the IRPOD or ordering data.

Government Source Inspection: If required: add, change or revise inspection requirements based on drawings, mil-spec, etc. Add DCMA/GSI vendor inspections to identify problems at the source.

Suggested Corrective Action for Items Currently in Navy: Briefly describe how items could be repaired or made acceptable, if applicable.

End Service if NSN is not 1H or X Cog: For nuclear material that is not 1H or X Cog, list the end service of the material. Entry is not required for locally procured material.

3.3 Additional Buttons Functionality

A. Buttons available on the on the top and bottom of the Create New ERS page are shown in Figure 3.28.

1. **Save Draft**: The Save Draft button may be used at any time to save your work as a draft to return to it later or perform occasional saves of data previously entered.

2. **Spell Check**: Clicking the Spell Check button will perform a spell check on text fields. If errors are found by the Spell Check, a dialog box will display providing spelling suggestions. When finished, the dialog box will provide a message stating that the Spell Check is Complete. Click Ok to exit the Spell Check.

3. **Add/View Attachments**: The Add/View Attachment button allows uploading, viewing and deleting of attachments. Attachments that are classified as U-NNPI may be uploaded in ERS. To Add or View Attachments:

   i. Click the Add/View Attachments button. The Upload Attachment Listing page shown in Figure 3.29 displays. This page will list any attachments that have been uploaded.
ii. Click the Add New Attachment button to browse for the file to upload. The Upload Attachment(s) page shown in Figure 3.30 displays.

iii. Follow the instructions on the page to upload an attachment. File types include: jpg, gif, bmp, doc, docx, txt, pdf, xls, xlsx, tif, png, zip, ppt, pptx. The maximum file size for any single attachment is 25 megabytes.

iv. Click Upload to complete the action. Click the Cancel button to return to the Upload Attachment Listing page.

v. When the file has been successfully uploaded, it will display in the Upload Attachment Listing page (See Figure 3.31).

vi. Click the Cancel button to return to the ER – Add/Edit page.

vii. To delete an attached file, use the Delete button (See Figure 3.31).
4. **Remarks Sheet**: The Remarks Sheet allows for multiple separate remarks to be signed off by the users who write them so that they cannot be edited by others who may be working on the same record. Clicking on the button displays Remarks Sheet entry page (See **Figure 3.32**).

![Figure 3.32](image-url)

i. Click on the Add New Remark button and the Remark text field will display (See **Figure 3.33**)

![Figure 3.33](image-url)
ii. Enter the information and click Save Remark and Figure 3.34 will display to allow the user to sign for their remark. Clicking Cancel Remark will cancel the action.

![Figure 3.34](image)

iii. Click the sign button and remark's signature page will display (See Figure 3.35)

![Figure 3.35](image)

iv. Read the instructions and check the acknowledge box and click the sign button, the remark will now be visible in the remarks sheet (See Figure 3.36).
v. To see a report of all remarks, click the Report button and a PDF version will appear in a new window.

vi. The back button will return the user to the previous screen.

5. **Save and Exit:** The Save and Exit button may be used at any time to save your work and exit the record.

6. **Back:** The Back button returns you to the previous screen. If data was not saved using the Save Draft button, any data typed on the page is NOT saved. If the Save Draft button had been clicked at any time, then any data entered before the Save Draft will have been retained.

7. **Unsign:** The Unsign button appears after each signature is made. The button is used to remove the signature and allows the record to be edited. The button will not be available to the user after the receipt acknowledgement has been sent from the next point in the process.

### 3.4 Originator Signing the ER

Originator Point Correspondence: Sign:

A. Clicking on the Sign button, (See **Figure 3.37**) the Originator is certifying the ER. Any mandatory fields that have been missed will be indicated in red at the top of the page. Those missing fields MUST be corrected in order to sign the ER.

![Figure 3.37](image)

B. Signature Confirmation, clicking the Sign button will cause the Signature Confirmation screen to be displayed (See **Figure 3.38**).
C. Read the instructions, check the box acknowledging that you have read, understand and agree with the signing requirements, then click the Sign button, the ER Originator Data Entry screen will be displayed (See Figure 3.39).

D. Buttons that appear on the ER after signing the record
   - **Back**: Clicking the Back button will return the user to the Originator Point Base page (See Figure 3.40).
   - **Unsign**: See Section 3.3.A.7 for a full description of this button.
   - **Forward ERS to Screening**: See Section 3.6 for detail instructions.
3.5 Originator Point - ER Base Page

The ER Base Page is the primary working page for a ER after it has been entered into ERS. To access the Base Page, click on an RCN hyperlink from the Worklist as detailed in Section 2 or the result of an RCN Number/Requisition Number search described in Section 6. The base page provides users with a method of reviewing ER status, sending relevant correspondence and identifying the investigating parties. This page has different configurations based on what status the record is in, Figure 3.41 shows the page in Draft status prior to the originator’s signature.

A. Origination Point – Editable Fields

1. View/Edit Originator Point Data:

   The View/Edit Originator Point Data link opens the same data entry page that was used to create the ER see Section 3.2 for additional information.
2. View/Add Notes or Reference Briefs:

The View/Add Notes and Reference Brief link provides access to input or view additional information about the processing of the ER. This information is internal to PDREP and does not appear on any reports or correspondence. The notes are visible to PDREP users that have access to ERS, not just the user who entered the note.

B. Send Message To:

Before the release of the ER to the Screening Point, the only hyperlinks available to the Originator are the Supervisor and Other. After clicking the hyperlink, the page that displays is nearly identical to the forwarding page discussed in Section 3.6. After the ER is released to the Screening Point the available recipient hyperlinks for direct e-mail messages are the Screening Point and Other, for all other recipients.

3.6 Forwarding (Release) the ER to the Screening Point

Forward ERS to Screening button

A. Clicking on the Forward ERS to Screening button, the Originator has signed the ER and it is ready for the screening point.

B. Click the Forward ERS to Screening button located on the ERS Originator Data Entry (See Figure 3.42)

C. Alternate method for forwarding the ERS to the screening point is located on the ERS base page using Forward to Screening Point hyperlink under the Release ERS label (See Figure 3.43).
D. After clicking either method, the Forward ERS from Originating Point to Screening Point correspondence page is displayed (See Figure 3.44).

E. The Choose Screening Point Activity will default to N00104.

F. After choosing the Screening Point Activity a dropdown will appear and a list of users and group mailboxes for the selected activity will display. If a focal point exists at the activity selected, the system will default to the focal point. A focal point allows management to assess the ER and based on the workload, assign the ER to the appropriate user. If a focal point exists, the user should select it otherwise select an individual Screening Point user or the group mailbox.

G. If the user needs to add CC addresses, then either type them into the CC: box and click Add CC (this must be done one address at a time) or use the Show Add CC List button to display a lookup of existing PDREP users by activity.

H. Once the recipients have been chosen, enter any desired comments into the Message: box.

I. Click Forward ERS to complete the forwarding action and to release the ER to the Screening Activity. Click Back to cancel this action.

*NOTE: Only after a ER is forwarded to the Screening Point is it considered “Released”.*
3.7 Originator Point Retract ERS from Screening Point Data Entry

Retract ERS hyperlink is used to retract the ER before the screening point has acknowledged the receipt of the ER, it may be used to add additional information or delete the record. The link will not be visible after the screening point has acknowledged receipt (See Figure 3.45).

A. Clicking the Retract ERS hyperlink will display the Send Message screen with the Choose Correspondence type automatically filled with Notify Screening Point about ERS Retraction (See Figure 3.46):
B. Type a message in the Type Message block as to why the ER is being retracted.
C. The ER will be returned to Draft status, where additional information may be added or the ER may be deleted.
3.8 Request for Additional Information

When the Originator receives a request for additional information from the Screening Point the Originator will receive an email notification with “ERS RCN (REQUEST MORE INFORMATION FROM ORIGINATOR)” in the email subject line. The email notification will be recorded in the ERS history. After the email notification is sent the ERS will return to a draft status (See Figure 3.47)

A. The Originator will select the View/Edit Originator Point Data hyperlink to add the additional information request to the appropriate data field.

B. When complete follow the instructions of Sections 3.4 and 3.6 to sign and release the ERS to the Screening Point

3.9 Originator Point Rebutting the Screening Point Decision

Figure 3.48 displays the base page after the ER has been returned to the Originator after the Screening Point completed their Final Signature.

Figure 3.48
Rebut the Screening Point Decision:

After evaluating the Screening Point Responses, if the Originator requires additional information or disagrees with the Screening Point Responses the Originator will use the Rebut Screening Point Decision hyperlink. The hyperlink will display the Return this ERS to the Screening Point for correction screen as shown in Figure 3.49 which will return the ER to the Screening Point for further evaluation.

![Figure 3.49](image)

The email notification requires a Rebuttal Code to be selected (See Figure 3.50). For a list of rebuttal codes see Table 3.6.

![Figure 3.50](image)
### Table 3.6

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>ROOT CAUSE NOT ADDRESSED</td>
</tr>
<tr>
<td>D</td>
<td>RESPONSIBLE PARTY NOT ADDRESS</td>
</tr>
<tr>
<td>E</td>
<td>CORRECTIVE ACTION NOT ADDRESSED</td>
</tr>
<tr>
<td>F</td>
<td>DISPOSITION NOT ADDRESSED</td>
</tr>
<tr>
<td>G</td>
<td>CREDIT NOT ADDRESSED</td>
</tr>
<tr>
<td>H</td>
<td>PREVENTIVE ACTION NOT ADDRESSED</td>
</tr>
<tr>
<td>I</td>
<td>INCOMPLETE OR INCORRECT ERS INFORMATION ON CLOSING LETTER</td>
</tr>
<tr>
<td>M</td>
<td>MULTIPLE REASONS FOR REBUTTAL</td>
</tr>
<tr>
<td>N</td>
<td>DISAGREE WITH CLOSING RESPONSE/FINDINGS</td>
</tr>
<tr>
<td>O</td>
<td>OTHER – NOT COVERED BY DEFINED CODE</td>
</tr>
<tr>
<td>R</td>
<td>REPEAT REBUTTAL</td>
</tr>
<tr>
<td>S</td>
<td>RESPONSE TRUNCATED OR NOT SUBMITTED IN PROPER FORMAT</td>
</tr>
<tr>
<td>T</td>
<td>CASE REOPENED DUE TO DELAYED RECEIPT OF EXHIBIT OR DATA</td>
</tr>
<tr>
<td>U</td>
<td>UPDATE OR CHANGE REQUESTED</td>
</tr>
<tr>
<td>V</td>
<td>RESPONSE NEEDS CLARIFICATION</td>
</tr>
<tr>
<td>W</td>
<td>RESPONSE IS FOR WRONG ERS</td>
</tr>
</tbody>
</table>

### 3.10 Originator Point Closing the ER

After evaluating the Screening Point Responses and the Originator agrees with the Screening Point Responses the Originator will use Close this ERS hyperlink (See Figure 3.51).

The hyperlink displays the Send Message page. The functionality of this page is similar to other email notification pages. After sending the email notification, the ER will be closed. After closing the ER, the Originator Point Data Entry page will display as Figure 3.52.
3.11 Originator Point Reopen the ER

If at any time the Originator is requested to reopen the ERS, the Originator will use the Reopen this ERS hyperlink (See Figure 3.53).

The link displays the Send Message page. The functionality of this page is similar to other email notification pages. After sending the email notification the ER will be reopened. The Originator Point Data Entry page will display as Figure 3.54.
4 SCREENING POINT

A complete explanation on accessing ERS and navigating to an individual ERs is available in Sections 1 and 2 of this user guide. Additionally, ensure when at the worklist page that Screening Point under Show Worklist For: has been selected then click the Display Standard Worklist button (or alternatively use a custom worklist). After selecting the record from the Worklist or from an RCN search, the record will display the Screening Point Data Entry page (See Figure 4.1).
If the receipt acknowledgement has not been performed, then the page will display as in Figure 4.2.

4.1 Acknowledge ERS

Send Originator Acknowledgement of Receipt

   A. Click on the Send Originator Acknowledgement of Receipt link and the Send Message screen will display (See Figure 4.3)
B. The Originator’s email address is auto-populated.

C. If required to add additional recipients use the drop down list from Add Mail TO/CC
   1. Select an Activity from the list.
   2. A new list of users from that Activity will be displayed.
   3. Select the users to be sent the email. If recipients are from different Activities, the process will need to be completed for each Activity.

D. Ensure the Send Originator Acknowledgement of Receipt is selected under Choose Correspondence Type:

E. Type any other additional information that needs to be conveyed in the Message box.

F. Click the Send button.

G. The PDREP MESSAGE screen will display (See Figure 4.4).

H. Click the Continue link to return to the Screening Point Base page (See Figure 4.5)
4.2 Accessing the Screening Point Data Entry

The Screening Point will use the View/Edit Screening Point Data hyperlink to open the ERS Screening Point Data Entry page that contain the Originators data entry fields which will not be editable.

A. ERS Screening Data Entry

The ERS Screening Data Entry screen as received from the Originator. (See Figure 4.6, Figure 4.7 and Figure 4.8).

![ERS Screening Data Entry](image1)

**Figure 4.6**
Figure 4.7

Deficient Item National Stock Number (NSN)
COG  FSC  NIIN  SMIC
D7  4820  123456789  C1

Detailed Cause Code:

Selected Cause Codes
3AJ - CALIBRATION

Material Level Code

Deficient Item Nomenclature
MISCELLANEOUS ITEM

Deficient Item Part Number

Quantity
(M) Received  Inspected  (M) Deficient  In Stock
2  0  1  0

DoD Unique Item Identifier

Item  Repairable Item
U-UNKNOWN  Unknown

Requisition/Document Number  Requisition Quantity

Government Furnished Material
No

Current Disposition of Deficient Item (the Exhibit)
M-HOLDING EXHIBIT

Action Requested
C - CREDIT

Status
A - ACTIVE

Deficiency Type
A - Bulk Receipt Inspection

Defect Material Attribute:  QTY DEF:
15-DIMENSIONS  1

(A) Technical Description of the Deficiency:
BBBBBB

(B) Basis for rejection or validation the deficiency
(Include Dwg/Spec violation involved):
BBBBBB

Installed Material:

Installed Material Action:
Condition of Packaging: A-New
Condition of Packaging Narrative: BBBBBB
Label Markings: MMMMM
Material Markings: NNNNNN

Originator Miscellaneous Notes:

Recommended Purge and Inspection of:
Navy Supply System and End-User Held Stock

Effect on Installed Material:

Recommended Changes to Prevent
Technical Ordering Data:

Government Source Inspection:

Suggested corrective action for items currently in Navy:

End service use if NSN is Not (1H) or (x) "Entry not applicable for vendor procured material":

On Hand and Back Order Quantities

<table>
<thead>
<tr>
<th>On Hand Quantity</th>
<th>Back Order Quantity</th>
</tr>
</thead>
</table>

Screening Point Historical Data:

Screening Point Misc Notes:

Info Only

Originator Point Correspondence: Signed By: Signed Date: 10/04/2018
Screening Point Correspondence: Sign

Save Draft  Spell Check  Add/View Attachments  Remarks Sheet  Save and Exit  Back

Figure 4.8
B. Explanation of Screening Point Data Fields

The Screening Point responsible data fields are located throughout the page.

1. **Figure 4.9 Data Field**
   - **(M) Added Date:** Auto-populated when the Originator creates the record.
   - **(M) Screening Point Release Date:** Auto-populated when the Screening Point releases the record to the Action Point.
   - **(M) Screening Point Receipt Date:** Auto-populated when the Screening point sends the originator the receipt acknowledgement.
   - **(M) ERS Due Date:** The date is auto-populated to be 21 days from today’s date until the ER is released to the Action point. When released the date in the field will be 21 days from the release date.

2. **Figure 4.10 Data Fields**
   - **(M) Screening Point Name, Phone Number & Email Address:** These will default to the information in your User Profile, but can be changed if the user is entering a ER on behalf of another Screener.
   - **Screening Point Priority:** Priority selections designated to assist in determining the order in which to work the records. This is done by selecting the corresponding priority from the Priority Drop Down, for a list of priorities see **Appendix 2**.
3. **Figure 4.11 Data Field**

   **(M) Status:** Defaults to A-ACTIVE. This can be changed. If the ER is for Information Only, the status should be set to AI.

![Figure 4.11 Data Field](image)

4. **Figure 4.12 Data Fields**

   **On Hand and Back Order Quantities**

   **(M) On Hand Quantity:** Provide the quantity of on hand stock.

   **Back Order Quantity:** Provide the quantity of stock that is in a Back Order status

   **Screening Point Historical Data:** The Screening Point will analyze historical information and provide any pertinent information related to the deficiency that will assist in the investigation.

   **Screening Point Misc Notes:** The screening Point may provide any additional information necessary to perform the investigation.
Info Only: Check the Info Only box if this ER is being released as information only.

4.3 Additional Buttons Functionality

The buttons on the top and bottom of the ER Screening Data Entry page have the same functionality as the Originator; they have been explained in Section 3.3.

4.4 Screening Point Signing the ER:

The Screening Point Correspondence Sign button has the same requirements as the Originator’s Sign button, for explanation of screens and signing requirements see Section 3.4.

4.5 Screening Point – ER Base Page

To access the Base Page, click on an RCN hyperlink from the Worklist as described in Section 2 or the result of an RCN Number/Requisition Number search described in Section 6. The base page provides users with a method of reviewing ER status, sending relevant correspondence and identifying the investigating parties. This page has different configurations based on what status the record is in; Figure 4.13 shows the page in Active status prior to the Screening Point signature.

A. Screening Point – Editable Fields

1. View/Edit Screening Point Data:

2. The View/Edit Screening Point Data link opens the same data entry page that was described in Section 4.2.A for additional information on data entry see Section 4.2.B.

3. View/Add Notes or Reference Briefs:
The View/Add Notes and Reference Brief link provides access to input or view additional information about the processing of the ER. This information is internal to PDREP and does not appear on any reports or correspondence. The notes are visible to PDREP users that have access to ERS, not just the user who entered the note.

B. Send Message To:

Before the Screening Point enters their data, the only hyperlinks available to the Screening Point are Originator and Other. The page that displays after clicking the hyperlink is nearly identical to the forwarding page previously discussed in Section 3.6. After the ER is released to the Action Point the available recipient hyperlinks for direct e-mail messages are the Originator, Action Point and Other for all other recipients.

4.6 Return to Originator

The Return to Originator hyperlink is available for the Screening Point, clicking this link will display the Return this ERS to the Originator for information (See Figure 4.14). This link may be used when additional information is required from the Originator. This functionality is the same as Forwarding The ERS, detailed instructions can be found in Section 3.6. Returning the ER to the Originator can only be done before signing and forwarding the ER to the Action Point.

*NOTE: After the Screening Point has returned the record to the Originator the record will be in Draft status with the Originator the only role who will have access to edit the record.
4.7 Forwarding (Release) the ER to the Action Point:

Forward ERS to Action Point button

A. The Screening Point has signed the ER and it is ready for the Action Point. Click on the Forward ERS to Action Point button located on the Screening Point Data Entry page (See Figure 4.15).

![ERS Screen Entry](image)

**Figure 4.15**

B. Alternate method for forwarding the ER to the Action Point is located on the ER base page using Forward to Screening Point hyperlink under the Release ERS (See Figure 4.16).

![Screening Point Entry](image)

**Figure 4.16**

C. The Forward to Action Point pages that display after clicking the hyperlink are nearly identical to the forwarding the ER pages previously discussed in Section 3.6.

4.8 Screening Point Retract ERS from Action Point:

Retract ERS hyperlink is used to retract the ER before the Action Point has acknowledged the receipt of the ER, it may be used to edit or add additional information. The link will not be visible after the action Point has acknowledged receipt (See Figure 4.17).
A. Clicking the Retract ERS hyperlink will display the Send Message screen with the Choose Correspondence type automatically filled with Notify Action Point about ERS Retraction (See Figure 4.18).

B. Type a message in the Type Message block as to why the ER is being retracted.
C. The ER will be returned to the Screening Point with the Screening Point signature removed.

4.9 Screening Point Rebutting the Action Point Decision

Figure 4.19 displays the base page after the ER has been returned to the Screening Point after the Action Point has completed their investigation.

Rebut the Action Point Decision:

After evaluating the Action Point Responses, if the Screening Point requires additional information or disagrees with the Action Point Responses the Screening Point will use The Rebut Action Point Decision hyperlink. The hyperlink will display the Return this ERS to the Action Point for correction screen which will return the ER to the Action Point for further evaluation. The remaining functionality is the same as the Originator rebutting the Screening Point decision which is detailed in Section 3.9.
4.10 Screening Point Data Entry After Action Point Returns the ER

To access the Screening Point Data Entry page, select the View/Edit Screening Point Data hyperlink (See Figure 4.20).

A. ERS Screening Data Entry

The ERS Screening Data Entry screen as received from the Action Point (See Figure 4.21, Figure 4.22, Figure 4.23 and Figure 4.24).
Figure 4.21
### Deficient Item Nomenclature

**TEST**

### Deficient Item Part Number

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Received</th>
<th>Inspected</th>
<th>Deficient</th>
<th>In Stock</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

### DoD Unique Item Identifier

### Item

**U-UNKNOWN**

### Reparable Item

**Unknown**

### Requisition/Document Number

### Requisition Quantity

### Government Furnished Material

**No**

**Current Disposition of Deficient Item (the Exhibit):**

**H-HOLDING EXHIBIT**

### Action Requested

**CI-SUBMITTED FOR CREDIT AND INFORMATIONAL PURPOSES**

### Status

**A-ACTIVE**

### Deficiency Type

**A-Bulk Receipt Inspection**

<table>
<thead>
<tr>
<th>Defect Material Attribute</th>
<th>QTY DEF:</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-PRESSURE TEST</td>
<td>1</td>
</tr>
</tbody>
</table>

**A Technical Description of the Deficiency:**

**Basis for rejection or validation the deficiency**

**Include Dwg/Spec violation involved:**

**TEST**

**Installed Material:**

**Installed Material Action:**

**No**

### Condition of Packaging

**A-New**

### Condition of Packaging Narrative

**TEST**

### Label Markings

**TEST**

### Material Markings

**TEST**

### Originator Miscellaneous Notes:

**Recommended Purge and Inspection of:**

**Navy Supply System and End-User Held Stock**

### Effect on Installed Material:

### Recommended Changes to Prevent

### Technical Ordering Data:
Government Source Inspection:

Suggested corrective action for items currently in Navy:

End service use if NSN is Not (1H) or (x) "Entry not applicable for vendor procured material":

<table>
<thead>
<tr>
<th>OnHand and BackOrder Quantities</th>
</tr>
</thead>
<tbody>
<tr>
<td>OnHand Quantity</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

Screening Point Historical Data:

TEST

Screening Point Misc Notes:

TEST

Info Only

Screening Point Resolution:

test

### Action Point Response

<table>
<thead>
<tr>
<th>Defective Material Attribute:</th>
<th>QTY DEF:</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-PRESSURE TEST</td>
<td>1</td>
</tr>
</tbody>
</table>

(A) Technical Description of the Deficiency:

TEST

(B) Basis for rejection or validation the deficiency

(Include Dwg/Spec violation involved):

TEST

Defect Valid:
No

Justification for Invalid:
test

Technically Acceptable:
M-MINOR REPAIR

Minor Repair Description:
test

Technical Receipt Inspection Adequate:
No

Recommended Revisions:
test

Vendor/DCMA Actions:
No

Recommended Actions:
test

DCMA Inspection Adequate:
No

Recommended Revisions:
test

Figure 4.23
B. Data Fields to be Completed After Action Point is Complete

The Screening Point has additional data fields to complete after evaluating the Action Point Responses (See Figure 4.25 and Figure 4.26)

Figure 4.25

1. Figure 4.25 Data Field

**Screening Point Resolution:** The Screening Point will provide a resolution/disposition for the defective material based on the Action Point responses.
2. **Figure 4.26** Data Fields

(M) **PQDR Recommendation**: Select the appropriate answer

**PQDR RCN**: If a PQDR is written enter the full PQDR RCN

**PQDR Justification**: Enter the justification for writing or not writing a PQDR

**Final Signature Button**: The Screening Point Final Signature button has the same requirements as the Originator's Sign button, for explanation of screens and signing requirements see Section 3.4.

4.11 **Create PQDR**:

Create PQDR hyperlink (See **Figure 4.27**) will display the PQDR Originator Data Entry page. Detailed instructions for PQDR can be found [here](#) in the PDREP main page under Manuals and User Guides.
NOTE: Create PQDR/SDR hyperlinks are available once ER is received by the Screening Point - in most instances Action Point evaluation is required; however, the option is available for those cases when Action Point input is not required.

When a PQDR is created from an ER, the associated PQDR will be hyperlinked on the ER base page. See Figure 4.28.

4.12 Create SDR:

Create SDR hyperlink (See Figure 4.29) will display the SDR Originator Data Edit page. Detailed instructions for SDR can be found here in the PDREP main page under Manuals and User Guides.
4.13 Forward to Originator Point for Closing:

The forward to Originator Point for Closing link is available for records that had the Final Signature from the Screening Point completed but not forwarded to the Originator Point. When clicked it opens the same page as the Forward ERS button does, see Section 3.6 for instructions.

4.14 ERS Base Additional Tools/Functionality

The functionality for the additional tools and functionality listed below are explained in detail in Section 3.12.

Choose Level
Quick Views
Attachments
Home
Help
User Information
Session Tracking
5 ACTION POINT

*NOTE: For Prime Contractor Action Points (Including Nuclear CDAs), please see Section 9 regarding Prime Contractor access to ERS.*

A complete explanation on accessing ERS and navigating to an individual ERs is available in Sections 1 and 2 of this user guide. Additionally, ensure when at the worklist page that Action Point under **Show Worklist For:** has been selected then click the Display Standard Worklist button. After selecting the record from the Worklist or from an RCN search (or alternatively using a custom worklist), the record will display the Action Point Data Entry page (See Figure 5.1).

If the receipt acknowledgement has not been performed, then the page will display like Figure 5.2.
5.1 Acknowledge ERS
Send Screening Point Acknowledgement of Receipt

A. Click on the Send Screening Point Acknowledgement of Receipt link and the Send Message screen will display (See Figure 5.3) shows the email from the Screening Point is auto-populated and the Choose Correspondence Type is automatically selecting Send Screening Point Acknowledgement of Receipt. The remaining functionality of this page is the same as explained in Section 4.1.

B. After completing the Acknowledgement of Receipt process the Action Point base page will be displayed (See Figure 5.4)
5.2 Accessing the Action Point Data Entry

The Action Point will use the View/Edit Screening Point Data hyperlink to open the ERS Action Point Data Entry page that contain the Originators and Screening Point data entry fields which will not be editable.

A. ERS Action Point Data Entry

The ERS Action Data Entry screen as received from the Screening Point. (See Figure 5.5, Figure 5.6, Figure 5.7 and Figure 5.8).

![ERS Action Data Entry Screen](https://example.com/ERS_Action_Data_Entry.png)

---

**Figure 5.5**
### SNIM Deficiency Report

<table>
<thead>
<tr>
<th>Date Deficiency Was Discovered</th>
<th>Material Received Date</th>
<th>Need by Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/30/2015</td>
<td>01/31/2015</td>
<td></td>
</tr>
</tbody>
</table>

**Deficient Item: National Stock Number (NSN)**

<table>
<thead>
<tr>
<th>COG</th>
<th>FSC</th>
<th>NIIN</th>
<th>SMIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>BB</td>
<td>111</td>
<td>11111111</td>
<td>B1</td>
</tr>
</tbody>
</table>

**Detailed Cause Code:**

- **1AQ - BONDING**

**Material Level Code:**

- 3-QA-3, QC-77, NON-LEVEL

**Deficient Item: Nomenclature:**

- MISCELLANEOUS ITEM

**Deficient Item: Part Number**

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Received</th>
<th>Inspected</th>
<th>Deficient</th>
<th>In Stock</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

**DoD Unique Item Identifier**

- **N-NEW**

**Requisition/Document Number**

- N59049030V001

**Action Requested**

- G - OTHER

**Status**

- ACTIVE

---

**Figure 5.6**
<table>
<thead>
<tr>
<th>Defect Material Attribute:</th>
<th>QTY DEF:</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-DAMAGE</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(A) Technical Description of the Deficiency:</th>
<th>(B) Basis for rejection or validation the deficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td>EEE</td>
<td>EEE</td>
</tr>
</tbody>
</table>

**Defect Valid:** Yes

**Justification for Invalid:**

**Technically Acceptable:** A-A3-I3

**Minor Repair Description:**

**Technical Receipt Inspection Adequate:** Yes

**Recommended Revisions:**

**Vendor/DCMA Actions:** Yes

**Recommended Actions:**

**DCMA Inspection Adequate:** Yes

**Recommended Revisions:**

**Technical Ordering Data Adequate:** Yes

**Recommended Revisions:**

**Stock Screening Recommended:** Yes

**Justification Not to Screen/Screening Inspection Criteria:**

**Installed Material:** Yes

**Installed Material Actions:** Yes

**Action for Installed Material:**

---

**Figure 5.7**
Figure 5.8

B. Explanation of Action Point Data Fields

The Screening Point responsible data fields are located throughout the page.
1. **Figure 5.9 Data Fields**

   **Action Point Release Date:** The data field will auto-populate with a date after the Action Point Releases the ER back to the Screening Point.

   **Action Point Receipt Date:** The data field will auto-populate when the Action Point sends the Screening Point Acknowledgement of Receipt.

   **ERS Due Date:** Is auto-populated with a date 21 days after the Screening Point releases the ER to the Action Point. This date represents the date the ER is due back to the Screening Point.

   **Revised Due Date and Revised Due Date Justification:** If the Action Point needs to revise the ERS Due Date the new date is documented in this field. At the time a revised date is entered the Revised Due Date Justification becomes mandatory and a selection from the drop down list is required. For a list of justification codes see Table 5.1.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Additional Information Requested</td>
</tr>
<tr>
<td>B</td>
<td>Additional information Requested - Testing</td>
</tr>
<tr>
<td>C</td>
<td>Additional information Requested - Pictures</td>
</tr>
<tr>
<td>D</td>
<td>Additional information Requested – Measurements/Insp</td>
</tr>
<tr>
<td>E</td>
<td>Requesting a Telecon/meeting/vendor visit</td>
</tr>
<tr>
<td>F</td>
<td>Need to see material in person</td>
</tr>
<tr>
<td>G</td>
<td>LAR re-assigned to another CDA</td>
</tr>
<tr>
<td>H</td>
<td>Waiting for response from Engineering</td>
</tr>
<tr>
<td>I</td>
<td>NAVSEA concurrence requested</td>
</tr>
<tr>
<td>J</td>
<td>Other</td>
</tr>
</tbody>
</table>

2. **Figure 5.10 Data Field**

   **(M) Status:** Defaults to A-ACTIVE. This can be changed. If the ER is for Information Only, the status should be set to AI.
3. **Figure 5.11 Data Fields**

**Defect Valid:** The Action Point will determine if the Defect Material Attribute described is valid or not. Select the correct answer and provide a justification if the answer is no in the Justification for invalid text field.

**Technically Acceptable:** Select whether the material is acceptable as is or needs a minor repair. In the text field explain why it is acceptable as is or describe the repair that is required.

**Technical Receipt Inspection Adequate:** select the correct answer, if receipt inspection is not adequate explain what needs to be changed.

**Vendor/DCMA Actions:** Select the correct answer, if the Vendor or DCMA have actions detail those actions in the narrative.
4. **Figure 5.12 Data Fields**

**DCMA Inspection Adequate:** Determine if DCMA inspections are adequate select the correct answer, if DCMA needs to change inspection procedures explain what needs to be changed in the narrative.

**Technical Ordering Data Adequate:** Determine if the technical ordering data is adequate, select the correct answer. If the ordering data needs to be changed provide the changes in the narrative.

**Stock Screening Recommended:** determine if a Stock Screening is required, select the correct answer. Provide the stock screening requirements or a justification as to why a stock screening is not warranted.

**Installed Material:** Determine if the installed material is affected, select the correct answer, determine if any actions are required for the installed material, select the correct answer. Provide the actions required on the installed material in the narrative text box.

**Save:** Click the save button to save the answers and narratives.
5. **Figure 5.13 Data Field**

   **Action Point Misc Notes**: The Action Point may provide any additional information necessary to the investigation.

5.3 **Additional Button Functionality:**

   The buttons on the top and bottom of the ER Action Data Entry page have the same functionality as the Originator, they have been explained in Section 3.3 of this user guide.

5.4 **Action Point Signing the ER:**

   The Action Point Correspondence Sign button has the same requirements as the Originator’s Sign button, for explanation of screens and signing requirements see Section 3.4 of this user guide.

5.5 **Action Point – ER Base Page**

   To access the Base Page, click on an RCN hyperlink from the Worklist as detailed in Section 2 or the result of an RCN Number/Requisition Number search described in Section 6. The base page provides users with a method of reviewing ER status, sending relevant correspondence and identifying the investigating parties. This page has different configurations based on what status the record is in, **Figure 5.14** shows the page in Active status prior to the Action Point signature.
A. Action Point – Editable Fields

1. View/Edit Action Point Data:
   The View/Edit Action Point Data link opens the same data entry page that was described in Section 5.2.A for additional information on data entry see Section 5.2.B.

2. View/Add Notes or Reference Briefs:
   The View/Add Notes and Reference Brief link provides access to input or view additional information about the processing of the ER. This information is internal to PDREP and does not appear on any reports or correspondence. The notes are visible to PDREP users that have access to ERS, not just the user who entered the note.

B. Send Message To:
   The only hyperlink available to the Action Point is to Screening. The page that displays after clicking the hyperlink is nearly identical to the forwarding page previously discussed in Section 3.6.

5.6 Forwarding (Release) ER to the Screening Point:
Forward ERS to Screening Point button

A. The Screening Point has signed the ER and it is ready for the Action Point. Click on the Forward ERS to Action Point button located on the Screening Point Data Entry page (See Figure 5.15).

![ERS Action Data Entry](image)

**Figure 5.15**

B. Alternate method for forwarding the ERS to the Action Point is located on the ERS base page using Forward to Screening Point for Closing hyperlink under the Release ERS (See Figure 5.16).
5.7 ERS Base Additional Tools/Functionality

The functionality for the additional tools and functionality listed below are explained in detail in Section 3.12.

Choose Level
Quick Views
Attachments
Home
Help
User Information
Session Tracking

6 ER SEARCH/REPORTS

ERS contains customized searches for users to easily access the record they need. In addition to this, the results displayed will have the Report Control Number (RCN) of the records in hyperlink form so that the user can directly access that record. Search criteria entered will be saved and kept for the entire user session.

6.1 Accessing ER Search

A. To access ER Search/Reports select the ER Search/Reports hyperlink from Engineering Referral System (ERS) fly out options (See Figure 6.1)
B. If already working in the ERS module the user may access the ERS Search /Report screen by selecting the ER Search/Reports tab (See Figure 6.2).

C. Whether which option is used the ER Search/Reports page displays (See Figure 6.3)
6.2 Example of ER Search/Reports

Sub tabs allow searching by: RCN Search, Advanced ER Search, NIIN/Contract, MIR ERS Search, (See Figure 6.4) For this example NIIN/Contract Search has been selected, but all searches work in similar ways, just with different filtering criteria.

A. Fields designated with a (M) are required in order to obtain search results. These fields are Start Date and End Date.

B. Enter additional parameters in the fields to further restrict the search results. At least one non-mandatory field must be entered.

C. When all of the desired criteria have been entered, click the Search button to return results. A sample result set is displayed in Figure 6.5.
D. Clicking a RCN in the result set will open the ER, the other hyperlinks will display information based on its heading.

7 ER CLONE

7.1 Accessing ER Clone

A. To access ERS Clone select *ERS Clone* hyperlink from the Engineering Referral System (ERS) fly out options (See Figure 7.1).

![Figure 7.1](image1.png)

B. If already working in the ERS Module, the user may access the ERS Clone screen by selecting the *ERS Clone* Tab (See Figure 7.2)

![Figure 7.2](image2.png)

C. Whether which option is used the ERS – Clone ERS screen will be displayed (See Figure 7.3)
### 7.2 Cloning a ER

A. The user will enter the ER RCN to be cloned in the RCN Number/Requisition Number block as shown in [Figure 7.4](#) and click search.

B. Click the RCN number that displays which corresponds with the RCN entered and searched for.

C. The Clone ER Screen will be displayed with data fields automatically filled from the selected ER in the ERS- Clone ERS screen. The data fields may be edited to fit the defective material being reported. For descriptions and explanations of the Originator data fields see [Section 3](#) of this User Guide.

D. A new and never used Serial number needs to be added to the RCN Serial Number (See [Figure 7.5](#)).

---

**Figure 7.3**

![ERS - Clone ERS](image)

**Instructions**

(M) denotes a mandatory field

1. Enter RCN (at least 8 characters) or Requisition Number (at least 6 characters) and click **Search**
2. Or enter MIR (at least 8 characters) and click **Search**

(M)RCN Number/Requisition Number:

![Search](image)

(M)MIR Number:

![Search](image)

**Figure 7.4**

![ERS - Clone ERS](image)

<table>
<thead>
<tr>
<th>RCN</th>
<th>Status</th>
<th>Category</th>
<th>Requisition No.</th>
<th>Modified by</th>
<th>Modification Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>N45112-190001</td>
<td>A</td>
<td>II</td>
<td></td>
<td></td>
<td>01/14/2019 10:01 A.M.</td>
</tr>
</tbody>
</table>

**Figure 7.5**

![ERS - Clone ERS](image)
8 ERS REASSIGN

8.1 Reassigning an ER

A. To reassign an ER to a different user at the screening or action point level, click the “Re-Assign/Transfer to new POC within DoDAAC” link on the ERS landing page (See Figure 8.1)

B. When clicked, the following screen will load (See Figure 8.2) – pictured is the Screening Point version of the page; when viewed at the action point level, the page will work the same but have Action Point labels.
C. On this screen, choose the user that to transfer the ER to.
D. Enter a message if desired, the message will not be saved to the record but will be sent in an email.
E. Click the Forward ERS button. Once forwarded, the ER will appear in the selected user’s worklist.

9 ERS AD HOC REPORTS

9.1 Accessing ER Ad Hoc Reports

A. To access an ER Ad Hoc report select ERS Ad Hoc hyperlink from the Engineering Referral System (ERS) fly out options (See Figure 9.1).
B. If already working in the ERS module, the user may access the ERS Ad Hoc screen by selecting the *ERS Ad Hoc Reports* tab (See **Figure 9.2**)

![Figure 9.2](image)

C. Whether which option is used the ERS Ad Hoc Report screen will be displayed (See **Figure 9.3**).

![Figure 9.3](image)
9.2 Using ERS Ad Hoc

Please refer to the Product Data Reporting and Evaluation Program (PDREP) ADHOC Search Tool User Guide for assistance using the ERS Ad Hoc.

The ADHOC query generator can be used to generate a variety of reports; all results are downloadable to MS Excel spreadsheets. On-screen instructions are available as a reminder on how to create the ADHOC query. The web page provides a method for users to choose a record type to query, select specific data elements from that record, and base the query on criteria like a date range or code used in the record to get the results. Users can run the query and adjust it if it is not exactly what they’re looking for by returning to the ADHOC Report page after running a query. The results can be downloaded into MS Excel when complete.

A. The Product Data Reporting and Evaluation Program (PDREP) ADHOC Search Tool User Guide. The User Guide can be located by clicking on the link provided.


B. While working in the module the user guide page can also be found by clicking the User Guides selection under the Help menu on the top of any PDREP window (See Figure 9.4).

Whether which option is used, the PDREP Main Page Guides and Manuals page will be displayed (See Figure 9.5)
Figure 9.5
10 PRIME CONTRACTOR ACCESS TO ERS

10.1 Prime Contractor Main Menu

When first logging into PDREP as a Prime Contractor user, the following screen will display (See Figure 10.1).

![Prime Contractor Main Menu](Image)

Figure 10.1

For how to properly use the PDREP Main Menu, see Section 2.

10.2 Prime Contractor ERS Worklist

The ERS Worklist works very similarly to the regular ERS Worklist. See Section 2.3 regarding the ERS worklist. An example of the Prime Contractor ERS Worklist is seen in Figure 10.2.

![ERS Worklist](Image)

Figure 10.2

The primary difference with the Prime Contractor Worklist is that the DoDAAC field is restricted to only the DoDAACs present on the user’s profile. Additionally, currently the only worklist option is for Action Point; the level all Prime Contractor users currently should be.

*NOTE: Prime Contractor users do not have access to custom worklists and the ad hoc feature.*
11 SUMMARY

This concludes the ERS User Guide. The PDREP Customer Support Desk is available to answer additional questions or to assist in data changes or exception processing and can be contacted as follows:

E-Mail:  webptsmh@navy.mil
Commercial:  (207) 438-1690
DSN:  684-1690
Fax:  (207) 438-6535
<table>
<thead>
<tr>
<th>Item</th>
<th>Field Length</th>
<th>Description</th>
<th>Entry Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Requested</td>
<td></td>
<td>Select the recommendation that best describes your expectations and recommendation for the handling of this ERS. This can greatly expedite processing by the Screening Point. Note: If material return or replacement is requested then please supply a detailed Material Return Address after selecting your recommendation.</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Added Date</td>
<td>8</td>
<td>The date form was submitted.</td>
<td>Auto-populated MM/DD/YYYY</td>
</tr>
<tr>
<td>Basis For rejection or validation of the deficiency</td>
<td></td>
<td>Specific reasons for rejection</td>
<td>Text Box</td>
</tr>
<tr>
<td>Category</td>
<td>1</td>
<td>A value of ‘1’ or ‘2’ designating the category of the ERS. A category 1 ERS is described as an item that could cause loss of life or catastrophic failure of a major weapon system. Category 2 ERSs are all those which are not category 1.</td>
<td>Radial Button</td>
</tr>
<tr>
<td>COG</td>
<td>2</td>
<td>COG is a two-digit code which identifies the item manager (ex 9C)</td>
<td>XX</td>
</tr>
<tr>
<td>Condition of Packaging</td>
<td></td>
<td>Condition of Packaging.</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Condition of Packaging Narrative</td>
<td></td>
<td>Condition of Packaging Narrative.</td>
<td>Text Box</td>
</tr>
<tr>
<td>Contract Line Item No.</td>
<td>6</td>
<td></td>
<td>4-digit Contract Order Number example (0001)</td>
</tr>
<tr>
<td></td>
<td>17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td>----</td>
<td>---------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Contract Number</strong></td>
<td></td>
<td>Filling in this field will allow investigators to efficiently investigate the ER and recoup funds. This is the contract under which the defective/deficient item/commodity was purchased or reworked.</td>
<td></td>
</tr>
<tr>
<td><strong>Contract number not provided or unknown</strong></td>
<td></td>
<td>Check this box if the contract was not provided or unknown, this will remove the mandatory requirement for a contract number</td>
<td></td>
</tr>
<tr>
<td><strong>Contract Units Received</strong></td>
<td>6</td>
<td>The number of items received based on the contract information entered</td>
<td></td>
</tr>
<tr>
<td><strong>Current Disposition of Deficient Item (The Exhibit)</strong></td>
<td></td>
<td>The disposition of the defective material. Please select one from list provided.</td>
<td></td>
</tr>
<tr>
<td><strong>Date Deficiency Was Discovered</strong></td>
<td>8</td>
<td>Date indicating when the deficiency was discovered. Either input a date in the form MM/DD/YYYY (12/31/2000) or select from the calendar provided.</td>
<td></td>
</tr>
<tr>
<td><strong>Defective Material Attribute</strong></td>
<td></td>
<td>The attribute that caused the material to be defective</td>
<td></td>
</tr>
<tr>
<td><strong>Deficiency Type</strong></td>
<td></td>
<td>Deficiency Type.</td>
<td></td>
</tr>
<tr>
<td><strong>Deficient</strong></td>
<td>7</td>
<td>The number of deficient items found during the inspection. Must be at least 1.</td>
<td></td>
</tr>
<tr>
<td><strong>Deficient Item Nomenclature</strong></td>
<td></td>
<td>The name of the defective/deficient item/commodity at its lowest identifiable level. Example (fitting/bronze/1 inch).</td>
<td></td>
</tr>
<tr>
<td><strong>Deficient Item Part Number</strong></td>
<td>20</td>
<td>Part number of the deficient item.</td>
<td></td>
</tr>
<tr>
<td><strong>Delivery order Number</strong></td>
<td>17</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Detailed Cause Code</strong></td>
<td>Please select Codes that most closely describe the types of problems experienced with the defective material. You may select more than one from the List. Be sure to click the add button after selecting each appropriate code.</td>
<td>Drop Down</td>
<td></td>
</tr>
<tr>
<td><strong>DoD Unique Item Identifier</strong></td>
<td>A set of data for assets that is globally unique and unambiguous, ensures data integrity and data quality throughout life, and supports multi-faceted business applications and users. For the most current guidance, please reference the UID website at <a href="http://www.acq.osd.mil/dpap/pdi/uid/index.html">http://www.acq.osd.mil/dpap/pdi/uid/index.html</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>DODDAC, Activity Name, Address</strong></td>
<td>DODDAC, Activity Name, Address of the user creating the ER</td>
<td>Auto-populated from PDREP Profile</td>
<td></td>
</tr>
<tr>
<td><strong>Email Address</strong></td>
<td>Email address for the Originator of the ERS.</td>
<td>Auto-populated from PDREP Profile</td>
<td></td>
</tr>
<tr>
<td><strong>End Service if NSN is not 1H or X Cog</strong></td>
<td>describe the nuclear service to ensure NAVSUP takes appropriate action</td>
<td>Text Box</td>
<td></td>
</tr>
<tr>
<td><strong>FSC</strong></td>
<td>The FSC is a Four-digit code which identifies the general stock classification (ex.9999)</td>
<td>XXXX</td>
<td></td>
</tr>
<tr>
<td><strong>Government Furnished Material</strong></td>
<td>Choose either YES, NO, or UNKNOWN. Only select &quot;YES&quot; if the deficient material was furnished by the Government to a Contractor for production purposes.</td>
<td>Drop Down</td>
<td></td>
</tr>
<tr>
<td><strong>In Stock</strong></td>
<td>The number of items in stock with the same manufacturer or contract number as the deficient item.</td>
<td>Numeric</td>
<td></td>
</tr>
<tr>
<td><strong>Inspected</strong></td>
<td>The number of items that were inspected.</td>
<td>Numeric</td>
<td></td>
</tr>
<tr>
<td><strong>Item</strong></td>
<td>Indicates whether or not the defective/deficient item/commodity is Original Equipment, New, Overhauled, Repaired or Unknown.</td>
<td>Drop Down</td>
<td></td>
</tr>
<tr>
<td>Label Markings</td>
<td>Label Markings</td>
<td>Text Box</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------</td>
<td>-------------------</td>
<td></td>
</tr>
<tr>
<td><strong>LSN</strong></td>
<td>9 Local Stock Number</td>
<td>Alpha-numeric</td>
<td></td>
</tr>
<tr>
<td><strong>Manufacturer CAGE Code</strong></td>
<td>5 Commercial and Government Entity code that identifies the manufacturer of material if different from vendor</td>
<td>Alpha-numeric</td>
<td></td>
</tr>
<tr>
<td><strong>Material Level Code</strong></td>
<td>The Quality Assurance level of the material.</td>
<td>Drop Down</td>
<td></td>
</tr>
<tr>
<td><strong>Material Markings</strong></td>
<td>Material Markings.</td>
<td>Text Box</td>
<td></td>
</tr>
<tr>
<td><strong>Material Received Date</strong></td>
<td>8 Date the material was received found on MMD or DD250</td>
<td>MM/DD/YYYY or select from calendar</td>
<td></td>
</tr>
<tr>
<td><strong>MIR Serial Number</strong></td>
<td>8 Serial Number of the associated MIR.</td>
<td>YYDDDD-NNN where YYDDDD is year and Julian day, NNN is a 3-digit serial number.</td>
<td></td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>Name of Point of Contact for the activity originating the ERS.</td>
<td>Auto-populated from PDREP Profile</td>
<td></td>
</tr>
<tr>
<td><strong>Need by Date</strong></td>
<td>8 Date estimate for when the completed ER is needed.</td>
<td>MM/DD/YYYY or select from calendar</td>
<td></td>
</tr>
<tr>
<td><strong>NIIN</strong></td>
<td>9 The deficient item's 9-digit National Item Identification Number (NIIN)</td>
<td>XXXXXXXXXXXX</td>
<td></td>
</tr>
<tr>
<td><strong>Originator Miscellaneous Notes</strong></td>
<td>Originator Miscellaneous Notes.</td>
<td>Text Box</td>
<td></td>
</tr>
<tr>
<td><strong>Originator Received Date</strong></td>
<td>8 Date the originator received the ER.</td>
<td>Auto-populated MM/DD/YYYY</td>
<td></td>
</tr>
<tr>
<td><strong>Originator Release Date</strong></td>
<td>8 Date the originator forwarded the ER.</td>
<td>Auto-populated MM/DD/YYYY</td>
<td></td>
</tr>
<tr>
<td><strong>Priority 1/2/3</strong></td>
<td>Selections designated to assist in determining the order in which to work the records.</td>
<td>Drop Downs</td>
<td></td>
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<tr>
<td>Field</td>
<td>Value</td>
<td>Description</td>
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</tr>
<tr>
<td>-------------------------------------------</td>
<td>-------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Purchase Order Number</td>
<td>17</td>
<td>The Purchase Order Number associated with the defective part. This can usually be found on the attached shipping document.</td>
<td></td>
</tr>
<tr>
<td>Quantity Defective</td>
<td></td>
<td>The number of items that are defective under a specific attribute</td>
<td></td>
</tr>
<tr>
<td>Received</td>
<td>7</td>
<td>The total number of items received in the same batch or lot as the deficient item. Must be at least 1 and greater than or equal to the number deficient.</td>
<td></td>
</tr>
<tr>
<td>Recommended Changes to Prevent</td>
<td></td>
<td>Changes that need to be made on Drawings or IRPODS, and any additional inspections required by a government source inspection</td>
<td></td>
</tr>
<tr>
<td>Recommended Purge or Inspection</td>
<td></td>
<td>What stock needs to purged or inspected</td>
<td></td>
</tr>
<tr>
<td>Repairable Item</td>
<td></td>
<td>Indicates the item being reported as deficient is repairable (e.g. HP air compressor) versus a consumable (Bolt) item.</td>
<td></td>
</tr>
<tr>
<td>Report Control Number (RCN)</td>
<td>12</td>
<td>The Report Control Number identifying the ERS.</td>
<td></td>
</tr>
<tr>
<td>Requisition Number</td>
<td>15</td>
<td>Document number that most often can be found with the deficient material paperwork or product packaging. (ex 1348 or MMD form).</td>
<td></td>
</tr>
<tr>
<td>Requisition Quantity</td>
<td>6</td>
<td>The number of items received based on the unit of measure</td>
<td></td>
</tr>
<tr>
<td>SAM Number</td>
<td>12</td>
<td>Report Control Number of the associated SAM Record</td>
<td></td>
</tr>
<tr>
<td><strong>Serial Batch Number</strong></td>
<td>If known enter the serial number, lot, heat or batch number of the deficient item.</td>
<td>Alpha-Numeric</td>
<td></td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>---------------</td>
<td></td>
</tr>
<tr>
<td><strong>Serial/batch/lot Type</strong></td>
<td>Select the type of serial number that you provide.</td>
<td>Drop Down</td>
<td></td>
</tr>
<tr>
<td><strong>Sign</strong></td>
<td>CAC Signature of the Engineer who has completed the Originator's portion of the ER</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SMIC</strong></td>
<td>2 Special Material Identification Code</td>
<td>XX</td>
<td></td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Select 'A' for normal ERS routing. Select 'AI' if ERS is submitted for informational and recordkeeping only and does not require investigation or further action.</td>
<td>Drop Down</td>
<td></td>
</tr>
<tr>
<td><strong>Suggested Corrective Action for items in the Navy</strong></td>
<td>Actions to be accomplished to accept or correct the material</td>
<td>Text Box</td>
<td></td>
</tr>
<tr>
<td><strong>SYSCOM</strong></td>
<td>Select the branch submitting this ERS.</td>
<td>Drop Down</td>
<td></td>
</tr>
<tr>
<td><strong>TDP or IRPOD Revision</strong></td>
<td>20 TDP or IRPOD Revision.</td>
<td>Alpha-Numeric</td>
<td></td>
</tr>
<tr>
<td><strong>Technical Description of the Deficiency</strong></td>
<td>A technical description which validates the defect.</td>
<td>Text Box</td>
<td></td>
</tr>
<tr>
<td><strong>Unit of Measure</strong></td>
<td>Units the material is ordered and issued in, e.g. “EA” = each, “FT” = feet, “CN” = cans, “BX” = box, “LB” = pound, etc.</td>
<td>Drop Down</td>
<td></td>
</tr>
<tr>
<td><strong>Vendor CAGE Code</strong></td>
<td>5 Commercial and Government Entity code that identifies the material supplier</td>
<td>Alpha-Numeric</td>
<td></td>
</tr>
</tbody>
</table>
## SCREENING POINT DATA FIELDS

<table>
<thead>
<tr>
<th>Item</th>
<th>Field Length</th>
<th>Description</th>
<th>Entry Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back Order Quantity:</td>
<td>10</td>
<td>The quantity of stock that is in a Back Order status</td>
<td>Numeric</td>
</tr>
<tr>
<td>ERS Due Date:</td>
<td>8</td>
<td>The date that is 21 days from the date the ER is released to the Action point.</td>
<td>Auto-populated MM/DD/YYYY</td>
</tr>
<tr>
<td>Info Only:</td>
<td></td>
<td>Check Box to indicate the ER is being released as information only.</td>
<td>Check box</td>
</tr>
<tr>
<td>On Hand Quantity:</td>
<td>10</td>
<td>The quantity of on hand stock in the navy supply system.</td>
<td>Numeric</td>
</tr>
<tr>
<td>Screening Point Historical Data</td>
<td></td>
<td>Pertinent information related to the deficiency that will assist in the investigation.</td>
<td>Text Box</td>
</tr>
<tr>
<td>Screening Point Misc Notes:</td>
<td></td>
<td>Additional information necessary to perform the investigation</td>
<td>Text Box</td>
</tr>
<tr>
<td>Screening Point Name, Phone Number &amp; Email Address:</td>
<td></td>
<td>Name of Point of Contact for the activity originating the ERS.</td>
<td>Auto-populated from PDREP profile</td>
</tr>
<tr>
<td>Screening Point Priority 1/2/3:</td>
<td></td>
<td>Selections designated to assist in determining the order in which to work the records.</td>
<td>Drop Downs</td>
</tr>
<tr>
<td>Sign</td>
<td></td>
<td>CAC Signature of the QAS who has completed the Screening Point's portion of the ER</td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td></td>
<td>Status (M): Select 'A' for normal ERS routing. Select 'AI' if ERS is submitted for informational and recordkeeping only and does not require investigation or further action.</td>
<td>Drop Down</td>
</tr>
</tbody>
</table>
# ACTION POINT DATA FIELDS

<table>
<thead>
<tr>
<th>Item</th>
<th>Field Length</th>
<th>Description</th>
<th>Entry Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Point Misc Notes:</td>
<td></td>
<td>The Action Point may provide any additional information necessary to the investigation.</td>
<td>Text Box</td>
</tr>
<tr>
<td>Action Point Receipt Date:</td>
<td>8</td>
<td>The date the Action Point sends the Screening Point Acknowledgement of Receipt.</td>
<td>Auto-populated MM/DD/YYYY</td>
</tr>
<tr>
<td>Action Point Release Date:</td>
<td>8</td>
<td>The date the Action Point Releases the ER back to the Screening Point.</td>
<td>Auto-populated MM/DD/YYYY</td>
</tr>
<tr>
<td>DCMA Inspection Adequate:</td>
<td></td>
<td>Determine if DCMA inspections are adequate, if DCMA needs to change inspection procedures.</td>
<td>Drop Down and Text Box</td>
</tr>
<tr>
<td>Defect Valid:</td>
<td></td>
<td>The action Point will determine if the Defect Material Attribute described is valid or not, provide a justification if the answer is no in the Justification for invalid text field.</td>
<td>Drop Down and Text Box</td>
</tr>
<tr>
<td>ERS Due Date:</td>
<td>8</td>
<td>The date that is 21 days from the date the ER is released to the Action point.</td>
<td>Auto-populated MM/DD/YYYY</td>
</tr>
<tr>
<td>Installed Material:</td>
<td></td>
<td>Determine if the installed material is affected, determine if any actions are required for the installed material. Provide the actions required on the installed material in the narrative text box.</td>
<td>Drop Down and Text Box</td>
</tr>
<tr>
<td>Revised Due Date and Revised Due Date Justification:</td>
<td></td>
<td>If the Action Point needs to revise the ERS Due Date the new date is documented in this field. At the time a revised date is entered the Revised Due Date justification becomes mandatory.</td>
<td>Auto-populated MM/DD/YYYY Drop Down</td>
</tr>
<tr>
<td>Sign</td>
<td></td>
<td>CAC Signature of the CDA who has completed the Action Point's portion of the ER</td>
<td></td>
</tr>
<tr>
<td>Status:</td>
<td>Select 'A' for normal ERS routing. Select 'AI' if ERS is submitted for informational and recordkeeping only and does not require investigation or further action.</td>
<td>Drop Down</td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>Stock Screening Recommended:</td>
<td>Determine if a stock Screening is required. Provide the stock screening requirements or a justification as to why a stock screening is not warranted.</td>
<td>Drop Down and Text Box</td>
<td></td>
</tr>
<tr>
<td>Technical Ordering Data Adequate:</td>
<td>Determine if the technical ordering data is adequate. If the ordering data needs to be changes provide the changes in the narrative.</td>
<td>Drop Down and Text Box</td>
<td></td>
</tr>
<tr>
<td>Technical Receipt Inspection Adequate:</td>
<td>If receipt inspection is not adequate explain what needs to be changed.</td>
<td>Drop Down and Text Box</td>
<td></td>
</tr>
<tr>
<td>Technically Acceptable:</td>
<td>Select whether the material is acceptable as is or needs a minor repair. In the text field explain why it is acceptable as is or describe the repair that is required.</td>
<td>Drop Down and Text Box</td>
<td></td>
</tr>
<tr>
<td>Vendor/ DCMA Actions:</td>
<td>If the Vendor or DCMA have actions detail those actions in the narrative.</td>
<td>Drop Down and Text Box</td>
<td></td>
</tr>
</tbody>
</table>
### APPENDIX 2 – Priority Codes

**Priority One**

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>NAVSUP WSS</td>
</tr>
<tr>
<td>O</td>
<td>OPW</td>
</tr>
<tr>
<td>P</td>
<td>PRODUCTION</td>
</tr>
<tr>
<td>Q</td>
<td>QUALITY ASSURANCE</td>
</tr>
<tr>
<td>S</td>
<td>SUPPLY/STORES</td>
</tr>
<tr>
<td>X</td>
<td>NAVSEA MANAGED SPARES</td>
</tr>
</tbody>
</table>

**Priority Two**

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>NO PRIORITY – INSPECT AS TIME PERMITS</td>
</tr>
<tr>
<td>1</td>
<td>WORK STOPPAGE IN CRITICAL PATH/CASREP</td>
</tr>
<tr>
<td>2</td>
<td>WORK STOPPAGE NON-CRITICAL PATH/TRANSHIP</td>
</tr>
<tr>
<td>3</td>
<td>VENDOR FURNISHED, PAYMENT PAST DUE/DESTINATION</td>
</tr>
<tr>
<td>4</td>
<td>INSUFFICIENT QTY FOR KNOWN JOBS</td>
</tr>
<tr>
<td>5</td>
<td>VENDOR FURNISHED, ON-TIME PAYMENT IN JEOPARDY</td>
</tr>
<tr>
<td>6</td>
<td>ZERO BALANCE IN STOCK</td>
</tr>
<tr>
<td>7</td>
<td>INSPECT AS TIME PERMITS</td>
</tr>
<tr>
<td>8</td>
<td>ACCEPTABILITY QUESTIONABLE, CURE DATES, QDM</td>
</tr>
<tr>
<td>9</td>
<td>EMPTY BIN</td>
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</tbody>
</table>

**Priority Three**

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>EMERGENT, TOP PRIORITY, IMMEDIATE NEED</td>
</tr>
<tr>
<td>B</td>
<td>URGENT, NEED ASAP</td>
</tr>
<tr>
<td>C</td>
<td>IMPORTANT, NEEDED TO SUPPORT SCHEDULE</td>
</tr>
<tr>
<td>D</td>
<td>AVAILABILITY NOT STARTED</td>
</tr>
<tr>
<td>E</td>
<td>BACKORDER</td>
</tr>
<tr>
<td>F</td>
<td>OTHER</td>
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</table>
### APPENDIX 3 – Units of Issue

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Units of Issue Literal</th>
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<tbody>
<tr>
<td>AM</td>
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<tr>
<td>AT</td>
<td>ASSORTMENT</td>
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<tr>
<td>AY</td>
<td>ASSEMBLY</td>
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<tr>
<td>BA</td>
<td>BALL</td>
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<td>BD</td>
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<td>BE</td>
<td>BALE</td>
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<tr>
<td>BF</td>
<td>BOARD FOOT</td>
</tr>
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<td>BG</td>
<td>BAG</td>
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<td>BK</td>
<td>BOOK</td>
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<td>BARREL</td>
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<td>LENGTH</td>
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<td>LITER</td>
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<td>Units of Issue Literal</td>
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<td>LOT</td>
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<tr>
<td>MC</td>
<td>THOUSAND CUBIC FEET</td>
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<td>MEAL</td>
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<td>METER</td>
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<td>THOUSAND</td>
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