Product Data Reporting and Evaluation Program (PDREP)
Automated Information System (AIS)
Quality Assurance Letter of Instruction & Letter of Delegation (QALI-LOD)
Delegator and Delegatee

User Guide
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*Hold the “CTRL” key and click on paragraph to follow link.
FOREWARD

This guide does not replace or amend any Department of Defense (DOD) instructions, regulations, and/or policies. Its purpose is to assist users with the Product Data Reporting and Evaluation Program– Automated Information System (PDREP-AIS) in the processing of Quality Assurance Letters of Instruction (QALI) and Letters of Delegation (LOD).

The guide will assist users with system functionalities including submitting, acknowledging, and completing QALIs and LODs. PDREP applications are designed to work in concert with existing DoD policy and processes for Submitting QALIs and LODs. Proper use of the PDREP application should facilitate compliance with DoD and component service policy.

REFERENCES:

1. SECNAV INSTRUCTION 4855.3C: Product Data Reporting and Evaluation Program
2. Navy Standard Operating Procedure 3683C (NAVSO P-3683C)
3. Defense Contract Management Agency NSEP Instruction (DCMA-INST 320)
INTRODUCTION

This document is intended to guide DoD personnel in the use of the Product Data Reporting and Evaluation Program – Automated Information System (PDREP-AIS) and in the process of entering Quality Assurance Letters of Instruction (QALI) and Letters of Delegation (LOD).

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

User access and login procedures can be located in the PDREP User Access and Login Procedures guide. First time PDREP users will need to submit a User Access request form, available on the NSLC home page: http://www.nslcptsmh.csd.disa.mil. Click on User Access Request to download the form. Follow the directions on the form to submit the request for access to PDREP.

To update your access to the PDREP-AIS system an Access Change Requests must be submitted. The User Access request form is available within the PDREP-AIS application. Once logged into the PDREP-AIS click ‘[Your Name]’ in the upper right corner of the page, click ‘Click Here’ to update profile information, click ‘Access Change Request’ tab, 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 QALI/LOD 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

Email: webptsmh@navy.mil

**Mailing Address**

Naval Sea Logistics Center Portsmouth

Bldg. 153, 2nd Floor, Portsmouth Naval Shipyard

Portsmouth, NH 03804-5000
1 NAVIGATING TO QALI

Once the user has logged in, the PDREP Home page will display as shown in Figure 1.1, depending on the user’s access level not all of the options may be listed.

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

![PDREP Home Page](image)

**Figure 1.1**

*Note: After May 2018 PDREP update, a list of recently accessed records will appear on the right-hand side of the PDREP main menu.*
1.1 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 1.2).

Figure 1.2

1.2 Selecting The Fly Out

Selecting either of the hyperlinks will allow the user to go directly to that page within the application.
2 VIEWING AND SEARCHING THE WORKLIST

The QALI Worklist page is used to filter the list of QALIs based on QAR/Submitter and QAR Team Code.

2.1 Accessing The QALI Worklist

A. To access QALI Worklist select the QALI Worklist hyperlink from the QALI/Letter of Delegation (LOD) fly out options (See Figure 2.1).

B. If already working in the QALI module the user may access the QALI Worklist screen by selecting the QALI Worklist tab (See Figure 2.2).

C. Whether which option is used, the QALI worklist page will display (See Figure 2.3).
1. **RCN#:** A Record Control Number (RCN) is a unique tracking number associated with each QALI/LOD.

2. **CAGE Code:** Contractor and Government Entity (CAGE) Code identified on the QALI/LOD.

3. **Contract Number:** The contract number identified on the QALI/LOD.

4. **QAR/Submitter:** The Userid of the person that is involved in the processing of the QALI/LOD. This field defaults to your Userid.

5. **Start/End Date:** The time frame in which to search. These fields default to a range of one year from the current date, and are mandatory fields. If you would like to change the dates in either field you may enter it using the required MM/DD/YYYY format or by using the calendar buttons to select the date.

### 2.2 Searching the QALI Worklist

A. To search for an existing QALI/LOD record, enter search criteria and click the Search button. The results of the search will be displayed (See Figure 2.4).
B. The results of the QALI/LOD search may produce up to five Worklist categories:

1. **Pending**: Records that have not yet been submitted and can only be edited by the delegator.

2. **In-Process**: Records that have been submitted but not yet acknowledged by the QAR on record.

3. **Reconsidered**: Records that have been submitted for reconsideration.

4. **Acknowledged**: Records that have been acknowledged but have not yet been completed by the QAR on record.

5. **Completed**: Records that have been completed by the QAR.
C. Some Worklists have links that permit further action, and all have sortable columns:

1. **QALI/LOD**: Indicates whether the record is a NAVY QALI or a LOD.
2. **RCN**: Displays the Record Control Number. When the link contained inside is clicked, it provides a view to the QALI/LOD data as well as access to any attachments. In the event that the record is one created by yourself, you will be able to edit the data within if the QALI/LOD has not been sent yet. The “Clone” link allows for cloning of the QALI/LOD and starts a new record based on a previously created one.
3. **Delegator Activity**: The DoDAAC of the activity that created the QALI/LOD.
4. **Delegated Activity**: The DoDAAC of the activity responsible for completing the QALI/LOD.
5. **Ctr CAGE**: The CAGE Code of the contractor referenced in the QALI/LOD.
6. **Contract Number(s)**: The Contract Number(s) referenced in the QALI/LOD.
7. **Issue Date**: The date that the QALI/LOD was issued to the Delegatee.
8. **Action**: Send STD LOD or Send Navy QALI Links allow the Originator to forward the QALI/LOD to the QAR. Acknowledge STD LOD or Acknowledge Navy QALI Links appear in the Action column for Reconsidered and In-Process Worklist. These Links allow the QAR to acknowledge receiving the QALI/LOD. Complete STD LOD or Complete navy QALI links appear in the Acknowledged Worklist and allow the QAR to complete the QALI/LOD. Reconsider STD LOD or Reconsider Navy QALI Links appear in the Completed Worklist and allow the Originator to submit the QALI/LOD to the QAR for reconsideration.
9. **View**: The View link provides a View only copy of the QALI/LOD.
10. **Click Here**: The Click here link is provided for each of the five Worklist categories and allows the user to download the Worklist data into an Excel spreadsheet.
3 CREATE AND SUBMIT A NEW QALI/LOD

3.1 Creating a QALI/LOD

A. From the PDREP – QALI / LOD Worklist page, click the Create QALI/LOD Tab (See Figure 3.1)

B. If already working in the QALI module the user may access the QALI Worklist screen by selecting the QALI Worklist tab (See Figure 3.2)

C. Whether which option is used, the QALI Create QALI/LOD page will display (See Figure 3.3).
Figure 3.3
D. Enter the information as requested on the QALI/LOD – New/Edit page (See Figure 2.5). (M) denotes a mandatory field.

1. **Save**: Saves the QALI/LOD as a draft

2. **Submit to Delegatee**: This button will only appear when your DODAAC and Name are selected as the Delegator. This may only be done once the mandatory fields are entered correctly.

3. **Add/View Attachment**: This button enables the user to attach documents to the QALI/LOD for submission. See Appendix 1 for detailed instructions on the attachment process.

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

5. **Delegator DoDAAC**: Defaults to show the current user’s DoDAAC that is listed in their profile.

6. **Auto-Fill DoDAAC Information**: This button is used to generate address information associated with the DoDAAC. This field is mandatory. After pressing the **Auto-Fill DoDAAC Information** button, the page will allow for selection of the delegator’s name through a drop-down menu. To generate the delegator’s information, press the **Auto-Fill Delegator Information** button.

7. **Delegatee DoDAAC**: Is a mandatory field where the QAR’s DoDAAC is input. After the DoDAAC is entered you may select Auto-fill DoDAAC Information.

8. **Type**: Drop-down menu allows for the selection of a either a Navy QALI or a Standard LOD.

9. **Navy Memo**: A number typically placed on letters to assist with filing

10. **Date**: Set as the current date. Used in the tracking process.

11. **Acknowledgement Due Date**: Date that the delegatee is expected to respond by. Defaults to 10 calendar days from the current date.

12. **CAGE Code**: A unique identifier code for the prime contractor responsible for the work on the contract. Press the **Auto-Fill CAGE Information** button to generate address information associated with the CAGE.

13. **Prime Contract Agency**: The agency responsible for the contract. This may be the Contract Administration Office (CAO). Usually identified by a DoDAAC.

14. **NSTR 2000**: If the item is NSTR 2000, select “Yes” from the drop-down menu.

15. **Material Level Code**: This drop-down menu contains various applicable Material Level Codes.
16. **Add QALI/LOD information** (See Figure 3.4)

   i. **Contract Number**: The contract number associated with the QALI/LOD.

   ii. **Line Item Number**: The number assigned to the subject item within the contract.

   iii. **Order Number**: The order number associated with the QALI/LOD.

   iv. **Purchase Order Delivery Date**: The date that the PO was received.

   v. **NSN**: The National Stock Number & name of the item the QALI/LOD is Nomenclature being written for. Press the *Auto-Fill NSN* button after entering the NIIN to generate the rest of the NSN as well as the Nomenclature.
      a. **COG**: Cognizance Code
      b. **FSC**: Federal Supply Code
      c. **NIIN**: National Item Identification Number
      d. **SMIC**: Special Material Identifier Code

   vi. **Add Item**: Once all of the mandatory fields have been entered this button will add the information to the QALI/LOD.

   vii. **Cancel Item Add**: This button will remove the information added to the Add QALI/LOD information fields.

   viii. **Auto Fill NSN**: This button will Auto-fill the NSN Information for NIIN entered.

    ix. **Edit**: This button will allow you to edit the QALI/LOD Contract Line Item

    x. **Delete**: This button will allow you to delete the QALI/LOD Contract Line Item.

17. **Notes**: The Notes section allows provides a space where the Delegator can enter relevant information for the QALI/LOD. This space allows for up to 4,000 characters to be entered.
E. Inspection attributes are added to a QALI/LOD by selecting the desired attribute from the drop-down menu under the Inspection Items/Product Verification header, and clicking the Add Attribute button (See Figure 3.3).

1. The list of available Inspection Attributes can be seen in Figure 3.6.

F. After selecting the attribute to add, the form will allow input of Percentage, Narrative, and Reference (See Figure 3.5). Press the Save Attribute button to save all inputted text. For an example of what the list of attributes looks like after adding several attributes (See Figure 3.7).

![Figure 3.5](image1)

![Figure 3.6](image2)
1. **Percentage**: The required percentage of the inspected feature that must pass the specified inspection test.

2. **Narrative**: Additional remarks about the specific test being performed.

3. **Reference**: The document that provides instruction to performing the specified test.

4. **Sat/UnSat**: Cannot be selected by the delegator. Sat/UnSat is selected by the QAR during the process of completing the inspection.

5. **Edit**: Allows for the editing of a previously added attribute.

6. **Delete**: Deletes the attribute from the list.

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**Figure 3.7**
3.2 Submitting QALI/LOD

A. When ready to submit the QALI/LOD, click the Submit to Delegatee button, and the Correspondence page will open (See Figure 3.8).

![Figure 3.8](image)

B. All information on this page has been automatically filled in based on the information entered by the delegator while creating the QALI/LOD.

C. All text can be edited if changes to the format/wording of the letter are desired.

1. **List of Attachments:** Any file that has been uploaded to this QALI/LOD. For detailed instructions on attachments, see Appendix 1. Select “All Attachments” to send every file listed in this box to the delegatee. To only send specific files listed,
hold the CTRL key and click on the individual attachments desired.

2. **Send**: Send the QALI/LOD to the delegatee.

3. **Back**: Return to the New/Edit screen.

4 **ACKNOWLEDGE A QALI/LOD**

A. Locate the QALI/LOD on the Worklist.

B. Click the Acknowledge NAVY QALI or Acknowledge STD LOD. The QALI/LOD Acknowledge page will load (See **Figure 4.1**)

![Figure 4.1](image)

1. **Accept/Reject/Maybe**: The Drop-down menu that contains the following options:
   i. PVI Requirements will be performed
   ii. PVI Requirements will be performed with exceptions
   iii. PVI Requirements cannot be performed.

2. **Reason**: This field allows the QAR to provide their reasoning for the option chosen in the Accept/Reject/Maybe field.

3. **Qualification Date**: Date of QAR qualification.

4. **Expiration Date**: Date of QAR qualification expiration.

5. **Acknowledge Date**: Date of acknowledgement. This field defaults to the current date.

6. **Add/View Attachment**: This button enables the user to attach documents to the QALI/LOD for submission. See **Appendix 1** for detailed instructions on the attachment process.

7. **Send**: Clicking the Send button opens the Correspondence page. The Delegatee can then verify the information is correct and all applicable attachments are selected on the Correspondence page. Click the Send button to finalize the Acknowledge process.

8. **Cancel**: Go back to the Worklist without saving or sending.
5 COMPLETE A QALI/LOD

A. Locate QALI/LOD on the Worklist.

B. Click the Complete NAVY QALI or Complete STD LOD link. The QALI/LOD Complete page will load. (See Figure 5.1)

C. Provide Sat/UnSat results for each inspection attribute.

![Figure 5.1](image)

1. **Send**: Clicking the Send button opens the Correspondence page. The Delegatee can then verify the information is correct and all applicable attachments are selected on the Correspondence page. Click the Send button to finalize the complete process.

2. **Save and Exit**: Saves the record and exits the page.

3. **Add/View Attachment**: This button enables the user to attach documents to the QALI/LOD for submission. See Appendix 1 for detailed instructions on the attachment process.

4. **Cancel**: Exit the page without saving.

5. **QALI PDREP#**: The RCN associated with the QALI/LOD.

6. **Inspection Results**: Fill in with a description of the inspection results.
6 RETURN A QALI/LOD FOR RECONSIDERATION

A. Locate QALI/LOD on the Worklist.

B. Click on the Reconsider link. The QALI/LOD Reconsideration page will load (See Figure 6.1)

![Figure 6.1](image)

1. **Reconsideration Date**: Date that the QALI/LOD is being reconsidered. This field defaults to the current date.

2. **Remarks**: Notes regarding the reconsideration of the QALI/LOD.

3. **Save**: Clicking the Save button opens the Correspondence page. The Delegatee can then verify the information is correct and all applicable attachments are selected on the Correspondence page. Click the Send button to finalize the Reconsideration process. In this instance, a copy of the email will also be sent to Ted Hohman (DCMA).

4. **Cancel**: Exit the page without saving.

7 RECALL A QALI/LOD

A. The Recalling of a QALI/LOD may only be done by the Delegator or someone with Management Level Access at the Delegator’s DoDAAC.

1. Locate QALI/LOD on the Worklist.

2. Click on the RCN# for the QALI/LOD that will be recalled. The QALI/LOD – New/Edit page will load.

3. Click the Recall button located between the Submit to Delegatee and Add/View Attachment buttons. (See Figure 7.1)

4. The QALI/LOD Recall page will load. (See Figure 7.2)
Recall Date: The Recall date is the Date that the QALI/LOD is being recalled. This field defaults to the current date and is a mandatory field.

Remarks: Notes regarding the recall of the QALI/LOD. This field is mandatory.

Save: Clicking the Save button opens the Correspondence page. The Delegatee can then verify the information is correct and all applicable attachments are selected on the Correspondence page. Click the Send button to finalize the Recall process.

Cancel: Clicking the Cancel button exits the page without saving.
8 Transfer QALI/LOD

A. From the PDREP – QALI / LOD Worklist page, click the Transfer QALI/LOD Tab (See Figure 8.1).

B. Those with Non-Management access will be able to select transfer Delegatee to Delegatee. Those with Management access will be able to select transfer Delegator to Delegator (See Figure 8.2 and 8.3).
C. From appropriate dropdown box, select the individual that is currently responsible for the record, or input RCN. (See Figure 8.4 and 8.5)

D. Click Search, and the following screen will appear:
**Transfer QALI / LOD**

**Instructions:**
(M) denotes a mandatory field

**TO SEARCH**
1. Select the type of transfer (e.g. from Delegator to another Delegator, or from a Delegatee to another Delegatee)
2. Select the Delegator or Delegatee whose QALI/LOD you want to transfer, OR enter the RCN to search
3. Click the Search button

**TO TRANSFER**
1. Select the QALI/LODs to transfer (i.e. check the box to select or click on the "Select All" button)
2. Select the Delegator or Delegatee to whom you would like to transfer the QALI/LOD.
3. Click the Transfer Selected button

**SEARCH FOR RECORDS TO TRANSFER:**

(M) Transfer:  FROM Delegator to Delegatee

(M) Delegates: USER, PDREP

OR (M) RCN:  

[Search]

**TRANSFER RECORDS**

FROM Delegator: USER, PDREP  TO (M) Delegates: -SELECT-

[Transfer Selected]

**TOTAL Result count:** 4

**SEARCH RESULTS**

<table>
<thead>
<tr>
<th>RCN</th>
<th>Type</th>
<th>Cage Code</th>
<th>Delegator Name</th>
<th>Delegated Activity</th>
<th>Delegee Name</th>
<th>Issue Date</th>
<th>View</th>
<th>Select ALL</th>
</tr>
</thead>
</table>

Figure 8.4
E. Under Transfer Records Header, select the Delegator or Delegatee that the record will be transferred too.

F. Select the record that will be transferred, either by clicking on “Select All” or individual boxes.

G. Click on “Transfer Selected”

H. Once the QALI has been transferred you will receive a message stating “Selected QALI or QALIs have been successfully transferred.”
9 SUMMARY

This concludes the QALI/LOD user guide. The PDREP Customer Service Desk is available to answer additional questions or to assist in data changes or exception processing and can be contacted at:

E-Mail: webptsmh@navy.mil
Commercial: (207) 438-1690
DSN: 684-1690
Fax: (207) 438-6535
APPENDIX I: ATTACHMENT INSTRUCTIONS

A. Upon clicking the Add/View Attachments button during the various stages of the QALI/LOD process, the Current Attachment(s) page will load. (See Figure A1.1)

![Figure A1.1](image1.png)

1. **Add New Attachment**: Begin the process of adding a new file to the QALI/LOD record.

2. **Back**: Clicking the Back button will exit the Attachments page and return you to the previous page.

B. Click the *Add New Attachment* button. The Upload Attachment(s) screen will load. (See Figure A1.2)

![Figure A1.2](image2.png)
1. **Browse**: Opens a Windows Explorer window to allow for the selection of the desired attachment file.

2. **Upload**: Uploads the Attachments selected to the QALI/LOD Record.

3. **Cancel**: Selecting the Cancel button Exits the current page.

C. Click the *Browse* button and select the desired file to attach.

D. Not all file types are allowed.

   1. File types that are allowed include: .doc, .docx, .xlsx, .xls, .txt, .pdf, .jpeg, .jpg, .gif, and .bmp

E. Select the Upload button to attach your selected documents to the QALI/LOD. Upon clicking the Upload All button, you will be returned to the Upload Attachments page (See **Figure AI.4**).

F. The selected files will appear in a list on the Upload Attachments screen.

![Figure AI.3](image)

1. **File Name**: Clicking the file name in this column will open the listed file.

2. **Edit**: Allows adding a description and comment to the selected file that will show up in the respective columns.

3. **Delete**: Will remove the file from the list.

4. **Add New Attachment**: Begin the process of adding a new file to the QALI/LOD record. Functions as described previously.

5. **Back**: Selecting the back button exits the current screen and returns you to your last screen.

G. When on the Correspondence page, a box featuring all the attachments uploaded to the QALI/LOD record will appear (See **Figure AI.5**). To send every attachment associated with the QALI/LOD record, select “All Attachments”. To send a specific attachment, select the
attachment on the list. To send multiple specific attachments, hold the CTRL key and click on the attachment names.

Figure A1.4

H. When the Send button is clicked on the Correspondence page, an e-mail will be sent to the listed recipients, and any attachments selected (as described above) will be attached to the automated email.

APPENDIX II: USER ACCESS LEVELS

Non-Management:

1. **Delegator**: User with this access level is given the ability to create, edit and recall a record only if the DODAAC matches and their name appears in the Delegator Name field on the QALI/LOD.

2. **Delegatee**: User with this access level is given the ability to edit (acknowledge, complete, reconsider, decline) a record only if the DoDAAC matches and their name appears in the Delegatee Name field on the QALI/LOD.

Management:

1. **Delegator**: User with this access level is given the ability to create, edit and recall any record assigned to their DoDAAC, regardless of whose name appears in the Delegator Name field on the QALI/LOD.

2. **Delegatee**: User with this access level is given the ability to edit (acknowledge, complete, reconsider, decline) any record assigned to the DoDAAC, regardless whose name appears in the Delegatee Name field on the QALI/LOD.

Full-Access:

This access level is reserved for NSLC PDREP Administrators. Allows for changing of all data fields in a record.

View Access:

Users with this access level are given the ability to search and view existing QALI/LOD records. Cannot create or edit a record.