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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) Receipt Inspection Management System (RIMS) 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-RIMS application and to facilitate compliance with DoD and Navy Receipt Inspection policy.

Refer to the appropriate inspection procedures, process instructions, and/or additional manuals for more information about RIMS program processes and requirements.

!!!ATTENTION!!!

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

NOTE: As of January 26th 2019, the Stand-Alone RIDL functionality has been permanently disabled. As of September 15th 2018, all SA RIDLs were migrated to the Supply Action module within the PDREP ecosystem. For further information about this, see both CNMM Volume II Chapter 5 and the SAM User Guide found here, as well as your local PDREP Coordinators and Process Owners.
INTRODUCTION

This document is intended to guide Navy personnel in the use of the PDREP-SAM application. SAM is used to facilitate the creation of, document, and analyze several types of records including:

- Approved Products List / Qualified Products List (APL/QPL)
- Material (Receiving) Assessments (MA)
- Material (Stock) Screening (MS)
- Quality Deficiency Material (QDM)

The PDREP application is accessible via the Product Data Reporting and Evaluation Program home page: [https://www.pdrep.csd.disa.mil/](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](https://www.pdrep.csd.disa.mil/) to download the form. Follow the directions on the form to submit the request for access to PDREP.

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/](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 SAM 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](https://www.pdrep.csd.disa.mil/) – 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 03804-5000
1 ACCESS LEVELS

Access to the functionality of SAM is determined by the User's Access Level. PDREP has several Access Levels for SAM. All levels are DoDAAC specific, in that if you have SAM access, you can only edit records associated with your DoDAAC.

Table 1.1

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<thead>
<tr>
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<th>Functions</th>
</tr>
</thead>
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<tr>
<td>No Access</td>
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</tr>
<tr>
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<td>View records</td>
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<tr>
<td></td>
<td>SAM APL/QPL Search</td>
</tr>
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<td>SAM Ad Hoc</td>
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<td>Inspector</td>
<td>Add a new record</td>
</tr>
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<td></td>
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</tr>
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<td></td>
<td>SAM APL/QPL Search</td>
</tr>
<tr>
<td></td>
<td>SAM Ad Hoc</td>
</tr>
<tr>
<td></td>
<td>Edit all fields on the SAM Record</td>
</tr>
<tr>
<td></td>
<td>Signatures:</td>
</tr>
<tr>
<td></td>
<td>• Sign for QA Signature</td>
</tr>
<tr>
<td></td>
<td>• Sign for Corrective Action Complete Signature</td>
</tr>
<tr>
<td></td>
<td>• Cannot sign for Closer Signature</td>
</tr>
<tr>
<td></td>
<td>SAD:</td>
</tr>
<tr>
<td></td>
<td>• Add SAD</td>
</tr>
<tr>
<td></td>
<td>• Write Condition</td>
</tr>
<tr>
<td></td>
<td>• Close SAD</td>
</tr>
<tr>
<td></td>
<td>Remarks Sheet</td>
</tr>
<tr>
<td></td>
<td>• Add/Edit</td>
</tr>
<tr>
<td></td>
<td>• Sign</td>
</tr>
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<td></td>
<td>SAM APL/QPL Search</td>
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<td>SAM Ad Hoc</td>
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<td>Edit all fields on the SAM Record</td>
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<td>Signatures:</td>
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<td></td>
<td>• Engineer Signature on APL/QPL</td>
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<td>SAD:</td>
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<td></td>
<td>• Add SAD</td>
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<tr>
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<td>• Write Condition</td>
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<td>• Write Resolution</td>
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<td></td>
<td>• Close SAD</td>
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<tr>
<td>Remarks Sheet</td>
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<tr>
<td>Add/Edit</td>
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<td>SAM Ad Hoc</td>
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<td>Edit all fields on the SAM Record</td>
<td></td>
</tr>
<tr>
<td>Signatures:</td>
<td>• Both Supply Signatures on APL/QPL</td>
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<tr>
<td></td>
<td>• Corrective Action Signature</td>
</tr>
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<td></td>
<td>• Closer Signature</td>
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<tr>
<td>SAD:</td>
<td>• Add SAD</td>
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<tr>
<td></td>
<td>• Write Condition</td>
</tr>
<tr>
<td></td>
<td>• Close SAD</td>
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<tr>
<td>Remarks Sheet</td>
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<td>Add/Edit</td>
<td></td>
</tr>
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<td>Sign</td>
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<td>Full Access</td>
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<tr>
<td>SAM Ad Hoc</td>
<td></td>
</tr>
<tr>
<td>Edit all fields on the SAM Record</td>
<td></td>
</tr>
<tr>
<td>Signatures:</td>
<td>• Sign all Signatures</td>
</tr>
<tr>
<td>SAD:</td>
<td>• Add SAD</td>
</tr>
<tr>
<td></td>
<td>• Write Condition</td>
</tr>
<tr>
<td></td>
<td>• Write Resolution</td>
</tr>
<tr>
<td></td>
<td>• Close SAD</td>
</tr>
<tr>
<td>Remarks Sheet</td>
<td></td>
</tr>
<tr>
<td>Add/Edit</td>
<td></td>
</tr>
<tr>
<td>Sign</td>
<td></td>
</tr>
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</table>
2 Getting to a SAM Record

2.1 SAM Worklist

2.1.1 Getting to the SAM Worklist

To enter the SAM module of PDREP, hover over the SAM program link on the left side of the PDREP Main Menu (See Figure 2.1). Upon hovering over the link, the SAM Fly-out menu will appear. Click on the desired section of SAM to enter. Not all options are available to all users. You must have permission to access the SAM module in your profile or the module link will not be visible.

---

**Figure 2.1**

Non-Nuclear: Hover over "Supply Action Module (SAM)" and select the desired starting page.

Nuclear: Click on the "Supply Action Module (SAM)" hyperlink which will send you to the NNPI side of PDREP. Once in the NNPI side, follow the above instructions.
To load the SAM Worklist, select “SAM Worklist” from the fly out menu. When selected, the SAM Worklist will appear (See Figure 2.2).

2.1.2 Using the SAM Worklist

The Worklist settings will default as shown in Figure 2.2. The Status field defaults to ALL. The DoDAAC field will be defaulted to your primary DoDAAC, however any DoDAAC may be entered. DoDAAC is a mandatory field for returning search results. Minimum search results can be obtained by entering just the DoDAAC and setting a date range along with the default “ALL” status selection. Date range defaults to the last year.

The remaining fields: Record Type, Document Number, Contract Number, Material Level Code, and Action allow for further restriction of the search criteria.

A. The “Status” selection box will display only the records for the specified status.

B. The date range for the Worklist defaults to the present date minus one year but can be changed if needed.

C. To search by Document Number, the full document number or a partial number may be entered. A search on a partial value will return results.

D. To search by Contract Number, the full Contract Number or a partial number may be entered. A search on a partial value will return results.

E. Options in the Action field are the available shipyard codes plus the ALL option

F. Options in the Matl Level Code are based on User profile, the dropdowns are: QA1, QA2, QA3, or QA4 (non-nuclear) and A, C, D, E, or G (nuclear). The Matl Level Codes defaults to blank.
G. The Sort field allows you to specify the order by which the results should be displayed. Sort options are: Added Date – Ascending, Added Date – Descending, MIR Serial Number, Status, Material Level, Action, and Contract Number.

H. When you have selected the criteria, click “Display Worklist” to view all RIM records matching the criteria entered. A sample set of results is illustrated in Figure 2.3a and Figure 2.3b.

I. Any of the fields in the search results can be sorted in ascending or descending order by clicking on that field heading.

J. The hyperlinks to the records work as follows:
   1. Edit: Enter the record with the ability to edit
   2. Read: Record is currently Read Only. Applies to closed records as well as locked records
   3. SAD: Enter the SAD Worklist for the given record. Not applicable to APL/QPL records.

<table>
<thead>
<tr>
<th>MA</th>
<th>180014</th>
<th>D</th>
<th>8138v225</th>
<th>BAR, ANGLE</th>
<th>SSBN-741</th>
<th>06/21/2018</th>
<th>2305.3</th>
<th>SAD</th>
<th>Edit</th>
<th>SAD</th>
</tr>
</thead>
<tbody>
<tr>
<td>MA</td>
<td>180014</td>
<td>D</td>
<td>8138v225</td>
<td>BAR, ANGLE</td>
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<td>Edit</td>
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</tr>
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<td>180015</td>
<td>C</td>
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<td>BODY, VALVE</td>
<td>CVN-65</td>
<td>06/21/2018</td>
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<td>SAD</td>
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<tr>
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<td>C</td>
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<td>FILTER</td>
<td>PC-6</td>
<td>06/21/2018</td>
<td>2305.4</td>
<td>SAD</td>
<td>Edit</td>
<td>SAD</td>
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<tr>
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<td>180019</td>
<td>C</td>
<td>N0010481584M16</td>
<td>FILTER</td>
<td>PC-6</td>
<td>06/21/2018</td>
<td>2305.4</td>
<td>SAD</td>
<td>Edit</td>
<td>SAD</td>
</tr>
</tbody>
</table>

Figure 2.3a

Note: A single record can appear more than once. This is due to the fact that either there are multiple contract numbers, or multiple requisition numbers associated to the record. See Figure 2.3b on the following page. In this example, 180014 has a single contract number, but multiple requisition numbers (have to view the record), and 180018 has multiple contract numbers (as visible on the worklist).

<table>
<thead>
<tr>
<th>MA</th>
<th>180014</th>
<th>D</th>
<th>8138v225</th>
<th>BAR, ANGLE</th>
<th>SSBN-741</th>
<th>06/21/2018</th>
<th>2305.3</th>
<th>SAD</th>
<th>Edit</th>
<th>SAD</th>
</tr>
</thead>
<tbody>
<tr>
<td>MA</td>
<td>180014</td>
<td>D</td>
<td>8138v225</td>
<td>BAR, ANGLE</td>
<td>SSBN-741</td>
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<td>SAD</td>
<td>Edit</td>
<td>SAD</td>
</tr>
<tr>
<td>MA</td>
<td>180015</td>
<td>C</td>
<td>8147Z001</td>
<td>BODY, VALVE</td>
<td>CVN-65</td>
<td>06/21/2018</td>
<td>2305.2</td>
<td>PARTIAL REJECT</td>
<td>Read</td>
<td>SAD</td>
</tr>
<tr>
<td>NS</td>
<td>180016</td>
<td>D</td>
<td></td>
<td>DISC</td>
<td>SS-99</td>
<td>06/21/2018</td>
<td>2305.2</td>
<td>SAD</td>
<td>Edit</td>
<td>SAD</td>
</tr>
<tr>
<td>MS</td>
<td>180017</td>
<td>D</td>
<td>8158v001</td>
<td>DISC</td>
<td>CVN-71</td>
<td>06/21/2018</td>
<td>2305.2</td>
<td>PARTIAL REJECT</td>
<td>Read</td>
<td>SAD</td>
</tr>
<tr>
<td>QDM</td>
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<td>C</td>
<td>N0010481584M15</td>
<td>FILTER</td>
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<td>06/21/2018</td>
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<td>SAD</td>
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<td>SAD</td>
</tr>
<tr>
<td>QDM</td>
<td>180019</td>
<td>C</td>
<td>N0010481584M16</td>
<td>FILTER</td>
<td>PC-6</td>
<td>06/21/2018</td>
<td>2305.4</td>
<td>SAD</td>
<td>Edit</td>
<td>SAD</td>
</tr>
</tbody>
</table>

Figure 2.3b

4. Underneath the SAM Worklist criteria section, the SAM RCN field can be used to retrieve a specific record if you know the RCN. See Figure 2.2.

K. Enter the RCN in the Selection Value field and click the “Go To SAM Record” button.

L. You will then be brought to the SAM record.
2.1.3 Other Worklist Functionality: Blank Acceptability Tag

Clicking the Blank Acceptability Tag button provides a means to create and print an “Acceptability” tag. Note that Material Screening or QDM record types need to be selected before entering the blank tag.

Complete the desired information. The fields available are as follows:

A. **Screening Letter/QDM Tasking Serial Number**: Serial Number associated with the Screening Letter or QDM Tasking.

B. **Screening Letter/QDM Tasking Date**: Date of Screening Letter or QDM Tasking

C. **NSN (COG, FSC, NIIN, SMIC)**: The National Stock Number for the material. Subfields are provided for the cognizant symbol (COG), Federal Stock Class (FSC), national item identification number (NIIN), and special material identification code (SMIC).

D. **Name (Auto-filled)**: Name of the user creating the tag. This is auto-filled from the user’s profile.

E. **Contract Number**: Contract number associated with the material being tagged

F. **Date of Inspection**: Date the material was inspected

G. **Inspecting Activity (Auto-filled)**: Name of activity that inspected the material. This is auto-filled from the selected DoDAAC on the previous screen.

H. **Statement of Material Acceptability**: Free text field to write the acceptability statement.
Click the Save Tag button to assure all of the information entered is captured for the tag. Tag information is not saved to the database, and captured only for the active session.

Click the Preview Tag button to view what the final tag will look like. The Tag will be displayed as a .pdf file in a separate window (See Figure 2.5).

For those familiar with RIMS, these tags are the same dimensions as the RIMS Tags. For users that require the use of a special printer for these tags, ensure that the printer is correctly mapped before attempting to print.
3 WORKING WITH SAM RECORDS

Clicking the Create SAM Record tab displays the screen shown in Figure 3.1.

Select the SAM Record Type. Options are:
- A. APL/QPL
- B. Material Assessment
- C. Material Screening
- D. QDM

Type in the item’s NSN. FSC and NIIN are mandatory.

Use the Lookup FSC button if the item’s FSC is not known.

Select the material level code for the material. Options are:
- A. Non-Nuclear:
  1. QA1
  2. QA2
  3. QA3
  4. QA4

RCNs are created sequentially (+1) from the last used RCN for your activity.
B. Nuclear:
   1. A
   2. C
   3. D
   4. E
   5. G

After all the mandatory selections/inputs have been made, click the “Create New SAM” record button to initiate the creation of a new record. The following sections describe how to work with the given record types once initialized. Select a hyperlink to go directly to that section.

A. Working with an APL/QPL Record
B. Working with a Material Assessment Record
C. Working with a Material Screening Record
D. Working with a QDM Record

3.1 Working with an APL/QPL Record

For an example of the APL/QPL .pdf report, see Appendix 1.

3.1.1 Creation

When APL/QPL is selected as a record type (See Figure 3.2), the first screen seen after clicking “Create New SAM” will be shown (See Figure 3.3).

![Figure 3.2](image-url)
On this first screen, the following fields are available:

A. **Report Control Number**: Auto-filled RCN from the creation page.
B. **Added Date**: Auto-filled timestamp of when the record was created.
C. **Project (M)**: Project drop down. Consists of a list of Ships or other misc. projects material generally gets ordered for. If this list needs a new addition, contact the PDREP Help Desk (See Introduction)
D. **Material Received Date (M)**: Date that the material was received
E. **Location (M)**: Physical location of the material
F. **Action (M)**: Shipyard code that has cognizant action on this record
G. **Status (M)**: Record Status. Options are: (An asterisk notates statuses typically used for APL/QPL)
   1. Accepted*
   2. Awaiting Insp
   3. Awaiting Mat'l
   4. Cancel*
   5. Closed*
   6. Continual
   7. Hold*
   8. In-Process*
   9. Lab
   10. Not Started*
11. Partial Reject*
12. Rejected*
13. Repair
14. SAD
15. Superseded
16. Supv Review

H. **NSN:** National Stock Number of the material
   1. COG
   2. FSC (M)
   3. NIIN (M)
   4. SMIC

I. **Material Level Code (M):** Material Level Code of the material

J. **Matl Description (M):** Description of the material

K. **Part Number:** Part number of the material (if applicable)

The only buttons available at this stage are:

A. **Save Record:** Saves the record – See [Section 3.5.1](#)

B. **Spell Check:** Performs a spell check on all the text fields of the record – See [Section 3.5.2](#)

C. **Lookup FSC:** Allows for FSC lookup of a NIIN. Same as on the previous page. – See [Section 3.5.3](#)

After the first instance of the record saving, more fields and buttons will appear (See [Figure 3.4a](#)).
Figure 3.4a
The new fields available are as follows:

A. Priority fields: See Figure 3.4b for the Update Priority page.
   1. Need by date
   2. Priority 1
   3. Priority 2
   4. Priority 3

![Figure 3.4b](image)

B. Requisition Number Information:
   1. Unknown check box – If checked, no requisition number will be listed on the record. Either this must be checked, or a Requisition Number must be input.
   2. Requisition Number (M)
   3. Requisition Quantity
   4. Job Order
   5. Key Op

C. Contract Number Information
   1. Unknown check box – If checked, no contract number will be listed on the record. Either this must be checked, or a Contract Number must be input.
   2. Contract Number (M)
   3. Line Item # (M)
   4. Contract Units Received
   5. Deliver Order Number
   6. Units of Measure – Drop down with a variety of selections
   7. Purchase Order Number
   8. TDP or IRPOD Revision
   9. Vendor CAGE Code (Contracted Supplier)
   10. Manufacturer CAGE Code

D. Quantity Reported – Not Mandatory until Closer Signature
E. Quantity Accepted – Not Mandatory until Closer Signature
F. Quantity Rejected – Not Mandatory until Closer Signature

The new buttons available are as follows:
A. Add/View Attachments – See Section 3.5.4
B. Notify Individual – See Section 3.5.5
C. Action History – See Section 3.5.6
D. Status History – See Section 3.5.7
E. Exhibit Tracking – See Section 3.5.8
F. Remarks Sheet – See Section 3.5.9
G. Report – See Appendix 1

Once requisition(s)/contract(s) have been entered onto the record, it will look similar to Figure 3.5

![Figure 3.5](image)

New buttons available in this section are as follows:
A. **Add Item**: Saves the new Requisition or Contract Number Information (depending on which box it is being used in)
B. **Cancel Item Add**: Deletes the existing typed-in values in either the Requisition or Contract Number Information (depending on which box it is being used in)
C. **Lookup Vendor CAGE**: Allows users to perform a CAGE Search and insert it into the Vendor CAGE field see paragraph 3.5.13
D. **Lookup MFG CAGE**: Allows users to perform a CAGE Search and insert it into the Manufacturer CAGE field see paragraph 3.5.13

Click the Edit button on a requisition/contract row to edit those values

Click the Delete button on a requisition/contract row to delete that row.

**Note: Deletion is required to modify the Document or Contract Number.**

**Important: Further fields are associated with contract numbers. Clicking the Edit button will present you with the following (See Figure 3.6 and Figure 3.7)**

---

**Figure 3.6**

![Figure 3.6](image1.png)

**Figure 3.7**

![Figure 3.7](image2.png)

The additional fields are as follows:

A. Serial/Batch Number

B. Serial Batch Type – Drop down consisting of the following options:
   1. B – Batch Number
   2. H – Heat Number
   3. L – Lot Number
   4. S – Serial Number
The additional buttons are as follows:

A. **Add Item**: Save the Serial Batch Number / Serial Batch Type

B. **Cancel Item Add**: Deletes any typed-in values in the Serial Batch Number / Serial Batch Type field.

C. **Save Item**: Saves all edits to the Contract Line Item

D. **Cancel Item Edit**: Cancels all unsaved edits to the Contract Line Item

Serial/Batch Line Items will be visible on the completed record page.

### 3.1.3 Signatures

Once all the information regarding the record has been filled in up to this point, a Supply signature is required. The Supply Signature will lock all fields except Action and Status above it to prevent further editing (See [Figure 3.8](#)).

Following the Supply Signature, the Engineering Block must be filled out. The engineering block has the following fields (See [Figure 3.8](#)):

A. Material Specification

B. Test Required (M)

C. Lab Test Serial Number (CM – Required if Test Required is set to “Yes”)  

D. Lab Test Date (CM – Same as above.)

E. Material Acceptable (CM – Same as above)

F. Engineer Signature

Once the Supply and Engineer signatures have been made, the Closer Signature on the record must be made. See [Figure 3.8](#).

![Figure 3.8](#)

20
3.1.4 Revision

After a record has been closed. A new button option will appear at the top of the page.

Revise Record – Increment the Revision of the record and allow for another signature cycle; including the ability to make changes to any of the fields (See Figure 3.9).

Figure 3.9

3.2 Working with a Material Assessment Record

For an example of the Material Assessment .pdf report, see Appendix 1.

3.2.1 Creation

When Material Assessment is selected as a record type (See Figure 3.2) in section 3.1, the first screen seen after clicking “Create New SAM” will be shown (See Figure 3.10).

Figure 3.10
On this first screen, the following fields are available:

A. **Report Control Number**: Auto-filled RCN from the creation page.

B. **Added Date**: Auto-filled timestamp of when the record was created.

C. **Project (M)**: Project drop down. Consists of a list of Ships or other misc. projects material generally gets ordered for. If this list needs a new addition, contact the PDREP Help Desk (See Introduction)

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

E. **Location (M)**: Physical location of the material

F. **Action (M)**: Shipyard code that has cognizant action on this record

G. **Status (M)**: Record Status. Options are:
   1. Accepted
   2. Awaiting Insp
   3. Awaiting Mat'l
   4. Cancel
   5. Closed
   6. Continual
   7. Hold
   8. In-Process
   9. Lab
   10. Not Started
   11. Partial Reject
   12. Rejected
   13. Repair
   14. SAD
   15. Superseded
   16. Supv Review

H. **NSN**: National Stock Number of the material
   1. COG
   2. FSC (M)
   3. NIIN (M)
   4. SMIC

I. **Material Level Code (M)**: Material Level Code of the material

J. **Matl Description (M)**: Description of the material

K. **Part Number**: Part number of the material (if applicable)
The only buttons available at this stage are:

A. **Save Record**: Saves the record – See Section 3.5.1

B. **Spell Check**: Performs a spell check on all the text fields of the record – See Section 3.5.2

C. **Lookup FSC**: Allows for FSC lookup of a NIIN. Same as on the previous page. – See Section 3.5.3

After the first instance of the record saving, more fields and buttons will appear (See Figure 3.11a).

### 3.2.2 Editing

![Figure 3.11a]
The new fields available are as follows:

A. Priority fields: See Figure 3.11b for the Update Priority page.
   1. Need by date
   2. Priority 1
   3. Priority 2
   4. Priority 3

![Figure 3.11b]

B. Requisition Number Information:
   1. Unknown check box – If checked, no requisition number will be listed on the record. Either this must be checked, or a Requisition Number must be input.
   2. Requisition Number (M)
   3. Requisition Quantity
   4. Job Order
   5. Key Op

C. Contract Number Information
   1. Unknown check box – If checked, no contract number will be listed on the record. Either this must be checked, or a Contract Number must be input.
   2. Contract Number (M)
   3. Line Item # (M)
   4. Contract Units Received
   5. Deliver Order Number
   6. Units of Measure – Drop down with a variety of selections
   7. Purchase Order Number
   8. TDP or IRPOD Revision
   9. Vendor CAGE Code (Contracted Supplier)
   10. Manufacturer CAGE Code
The new buttons available are as follows:

A. Add/View Attachments – See Section 3.5.4
B. Notify Individual – See Section 3.5.5
C. Action History – See Section 3.5.6
D. Status History – See Section 3.5.7
E. Exhibit Tracking – See Section 3.5.8
F. Remarks Sheet – See Section 3.5.9
G. Report – See Appendix 1

Once requisition(s)/contract(s) have been entered onto the record, it will look similar to Figure 3.12

![Figure 3.12](image)

New buttons available in this section are as follows:

A. **Add Item**: Saves the new Requisition or Contract Number Information (depending on which box it is being used in)

B. **Cancel Item Add**: Deletes the existing typed-in values in either the Requisition or Contract Number Information (depending on which box it is being used in)

C. **Lookup Vendor CAGE**: Allows users to perform a CAGE Search and insert it into the Vendor CAGE field see paragraph 3.5.13
D. **Lookup MFG CAGE:** Allows users to perform a CAGE Search and insert it into the Manufacturer CAGE field see paragraph 3.5.13

Click the Edit button on a requisition/contract row to edit those values

Click the Delete button on a requisition/contract row to delete that row.

*Note: Deletion is required to modify the Document or Contract Number.*

*Important: Further fields are associated with contract numbers. Clicking the Edit button will present you with the following (See Figure 3.13 and Figure 3.14)*

![Figure 3.13](image1)

![Figure 3.14](image2)

The additional fields are as follows:

A. Serial/Batch Number

B. Serial Batch Type – Drop down consisting of the following options:
   1. **B** – Batch Number
   2. **H** – Heat Number
   3. **L** – Lot Number
   4. **S** – Serial Number
The additional buttons are as follows:

A. **Add Item:** Save the Serial Batch Number / Serial Batch Type
B. **Cancel Item Add:** Deletes any typed-in values in the Serial Batch Number / Serial Batch Type field.
C. **Save Item:** Saves all edits to the Contract Line Item
D. **Cancel Item Edit:** Cancels all unsaved edits to the Contract Line Item

Serial/Batch Line Items will be visible on the completed record page.

If no SAD has been written for the record, it can be immediately closed once all mandatory fields have been filled in. For further information on SADs, see **Chapter 4**.

If a SAD has been written, an additional mandatory field gets added to the record.

Technical Work Document Serial Number

### 3.2.3 Signatures

If a SAD has been written, an additional mandatory signature will be added to the record. This signature is called the Corrective Action (CA) signature and is used to signify that the Corrective Action(s) as noted in the SADs have been completed.

A. Corrective Action Signature can be signed by the following access levels:
   1. Inspector
   2. Supply
   3. Full

B. Once signed, all fields except Action and Status are locked from being further edited.

C. If any SAD has “QA Review Required” OR “Physical Inspection Required” selected, an additional mandatory signature will be added to the record. This is the QA Review Signature.

D. QA Review Signature can be signed by the following access levels:
   1. Inspector
   2. Full

E. Once all SADs and other mandatory signatures (if any) are signed, the record can be closed.

F. Closer Signature can be signed by the following access levels:
   1. Supply
   2. Full

See **Figure 3.15** for a view of a fully completed Material Assessment record’s signature block.

*Note that up until the Closer Signature, the CA and QA signature can be modified by the user or an individual with Full Access.*
3.2.4 Revision

After a record has been closed. A new button option will appear at the top of the page.

Revise Record – Increment the Revision of the record and allow for another signature cycle; including the ability to make changes to any of the fields (See Figure 3.16).

3.3 Working with a Material Screening Record

For an example of the Material Screening .pdf report, see Appendix 1.

3.3.1 Creation

When Material Screening is selected as a record type (See Figure 3.2 in Section 3.1), the first screen seen after clicking “Create New SAM” will be shown (See Figure 3.17).
On this first screen, the following fields are available:

A. **Report Control Number**: Auto-filled RCN from the creation page.
B. **Added Date**: Auto-filled timestamp of when the record was created.
C. **Screening Letter Serial Number**: Serial Number of the Screening Letter instigating the screening
D. **Screening Letter Date**: Date of the Screening letter
E. **PQDR Number**: PQDR Number associated with this Screening.

   **Note**: Full PQDR RCN Required (ex: N39040-18-1234)
F. **SDR Number**: SDR Number associated with this Screening.

   **Note**: Full SDR RCN Required (ex: N39040-18-1234)
G. **Project (M)**: Project drop down. Consists of a list of Ships or other misc. projects material generally gets ordered for. If this list needs a new addition, contact the PDREP Help Desk (See **Introduction**)
H. **Material Received Date (M)**: Date that the material was received
I. **Location (M)**: Physical location of the material
J. **Action (M):** Shipyard code that has cognizant action on this record

K. **Status (M):** Record Status. Options are:
   1. Accepted
   2. Awaiting Insp
   3. Awaiting Mat’l
   4. Cancel
   5. Closed
   6. Continual
   7. Hold
   8. In-Process
   9. Lab
   10. Not Started
   11. Partial Reject
   12. Rejected
   13. Repair
   14. SAD
   15. Superseded
   16. Supv Review

L. **NSN:** National Stock Number of the material
   1. COG
   2. FSC (M)
   3. NIIN (M)
   4. SMIC

M. **Material Level Code (M):** Material Level Code of the material

N. **Matl Description (M):** Description of the material

O. **Part Number:** Part number of the material (if applicable)

The only buttons available at this stage are:

A. **Save Record:** Saves the record – See Section 3.5.1

B. **Spell Check:** Performs a spell check on all the text fields of the record – See Section 3.5.2

C. **Lookup FSC:** Allows for FSC lookup of a NIIN. Same as on the previous page. – See Section 3.5.3

After the first instance of the record saving, more fields and buttons will appear (See Figure 3.18a).
### 3.3.2 Editing

**Figure 3.18a**

<table>
<thead>
<tr>
<th>Report Control Number:</th>
<th>N3940 - 18 - 0036</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDED DATE:</td>
<td>2018-07-26 08:15:39</td>
</tr>
<tr>
<td>(CM)Screening Letter Serial Number:</td>
<td>23456</td>
</tr>
<tr>
<td>(CM)Screening Letter Date:</td>
<td>07/06/2018</td>
</tr>
<tr>
<td>PQOR Number:</td>
<td></td>
</tr>
<tr>
<td>SOR Number:</td>
<td></td>
</tr>
<tr>
<td>(P)Project:</td>
<td>BULK R1</td>
</tr>
<tr>
<td>NEED BY:</td>
<td></td>
</tr>
<tr>
<td>PRIORITY 1:</td>
<td>Update Priority</td>
</tr>
<tr>
<td>PRIORITY 2:</td>
<td></td>
</tr>
<tr>
<td>PRIORITY 3:</td>
<td></td>
</tr>
<tr>
<td>PRIORITY LAST UPDATE USER:</td>
<td></td>
</tr>
<tr>
<td>PRIORITY LAST UPDATE DATE:</td>
<td></td>
</tr>
<tr>
<td>(M)MATERIAL RECEIVED DATE:</td>
<td>07/06/2018</td>
</tr>
<tr>
<td>(M)LOCATION:</td>
<td>PDEP User Guide</td>
</tr>
<tr>
<td>(M)ACTION:</td>
<td>139</td>
</tr>
<tr>
<td>(M)STATUS:</td>
<td>NOT STARTED</td>
</tr>
<tr>
<td>COD:</td>
<td></td>
</tr>
<tr>
<td>(M)FSC:</td>
<td>462D</td>
</tr>
<tr>
<td>Deficient Item National Stock Number(SRN):</td>
<td></td>
</tr>
<tr>
<td>(GIN):</td>
<td>11111111</td>
</tr>
<tr>
<td>SHIC:</td>
<td></td>
</tr>
<tr>
<td>Lookup FSC:</td>
<td></td>
</tr>
<tr>
<td>(M)Material Level Code:</td>
<td>A</td>
</tr>
<tr>
<td>MATL DESCRIPTION LIST:</td>
<td>PAINT</td>
</tr>
<tr>
<td>(M)Part Description:</td>
<td>001</td>
</tr>
</tbody>
</table>

**Add Requisition Number Information**

<table>
<thead>
<tr>
<th>(M) Requisition Number/Requisition Quantity</th>
<th>Job Order</th>
<th>Key Op</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Contract No. not provided or is unknown:**

**Add Contract Number Information**

<table>
<thead>
<tr>
<th>(M) Contract Number</th>
<th>(M) Line Item #</th>
<th>Contract Units Described</th>
<th>Delivery Order Number</th>
<th>Units of Measure</th>
<th>Purchase Order Number</th>
<th>TDP or IRPQG Revision</th>
<th>Vendor Cage Code (Contracted Supplier)</th>
<th>Manufacturer Cage Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Supply**

<table>
<thead>
<tr>
<th>CLOSER:</th>
<th>SIGNED BY</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Save**

<table>
<thead>
<tr>
<th>Spell Check</th>
<th>Add/View Attachments</th>
<th>Notify Individual</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Add/View Attachments**

<table>
<thead>
<tr>
<th>SAD Worklist</th>
<th>Action History</th>
<th>Status History</th>
<th>Exhibit Tracking</th>
<th>Remarks Sheet</th>
<th>Report</th>
<th>Acceptability Tag</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The new fields available are as follows:

A. **Priority fields:** See **Figure 3.18b** for the Update Priority page
   1. Need by date
   2. Priority 1
   3. Priority 2
   4. Priority 3

![Figure 3.18b](image)

B. **Requisition Number Information:**
   1. Unknown check box – If checked, no requisition number will be listed on the record. Either this must be checked, or a Requisition Number must be input.
   2. Requisition Number (M)
   3. Requisition Quantity
   4. Job Order
   5. Key Op

C. **Contract Number Information**
   1. Unknown check box – If checked, no contract number will be listed on the record. Either this must be checked, or a Contract Number must be input.
   2. Contract Number (M)
   3. Line Item # (M)
   4. Contract Units Received
   5. Deliver Order Number
   6. Units of Measure – Drop down with a variety of selections
   7. Purchase Order Number
   8. TDP or IRPOD Revision
   9. Vendor CAGE Code (Contracted Supplier)
   10. Manufacturer CAGE Code

D. **Stock Screening Results**

E. **Quantity Reported – Not Mandatory until Closer Signature**
F. Quantity Accepted – Not Mandatory until Closer Signature
G. Quantity Rejected – Not Mandatory until Closer Signature

The new buttons available are as follows:
A. Add/View Attachments – See Section 3.5.4
B. Notify Individual – See Section 3.5.5
C. Action History – See Section 3.5.6
D. Status History – See Section 3.5.7
E. Exhibit Tracking – See Section 3.5.8
F. Remarks Sheet – See Section 3.5.9
G. Report – See Appendix 1
H. Acceptability Tag – See Section 2.1.3

Once requisition(s)/contract(s) have been entered onto the record, it will look similar to Figure 3.19

Figure 3.19

New buttons available in this section are as follows:
A. **Add Item**: Saves the new Requisition or Contract Number Information (depending on which box it is being used in)
B. **Cancel Item Add**: Deletes the existing typed-in values in either the Requisition or Contract Number Information (depending on which box it is being used in)
C. **Lookup Vendor CAGE**: Allows users to perform a CAGE Search and insert it into the Vendor CAGE field see paragraph 3.5.13.
D. **Lookup MFG CAGE**: Allows users to perform a CAGE Search and insert it into the Manufacturer CAGE field see paragraph 3.5.13.
Click the Edit button on a requisition/contract row to edit those values
Click the Delete button on a requisition/contract row to delete that row.

**Note: Deletion is required to modify the Document or Contract Number.**

**Important: Further fields are associated with contract numbers. Clicking the Edit button will present you with the following (See Figure 3.20 and Figure 3.21)**

The additional fields are as follows:

E. Serial/Batch Number

F. Serial Batch Type – Drop down consisting of the following options:
   1. B – Batch Number
   2. H – Heat Number
   3. L – Lot Number
   4. S – Serial Number
The additional buttons are as follows:

A. **Add Item**: Save the Serial Batch Number / Serial Batch Type
B. **Cancel Item Add**: Deletes any typed-in values in the Serial Batch Number / Serial Batch Type field.
C. **Save Item**: Saves all edits to the Contract Line Item
D. **Cancel Item Edit**: Cancels all unsaved edits to the Contract Line Item

Serial/Batch Line Items will be visible on the completed record page.

If no SAD has been written for the record, it can be immediately closed once all mandatory fields have been filled in. For further information on SADs, see [Chapter 4](#).

If a SAD has been written, an additional mandatory field gets added to the record.

Technical Work Document Serial Number

### 3.3.3 Signatures

If a SAD has been written, an additional mandatory signature will be added to the record. This signature is called the Corrective Action (CA) signature and is used to signify that the Corrective Action(s) as noted in the SADs have been completed.

A. Corrective Action Signature can be signed by the following access levels:
   1. Inspector
   2. Supply
   3. Full

B. Once signed, all fields except Action and Status are locked from being further edited.

C. If any SAD has “QA Review Required” OR “Physical Inspection Required” selected, an additional mandatory signature will be added to the record. This is the QA Review Signature.

D. QA Review Signature can be signed by the following access levels:
   1. Inspector
   2. Full

E. Once all SADs and other mandatory signatures (if any) are signed, the record can be closed.

F. Closer Signature can be signed by the following access levels:
   1. Supply
   2. Full

See [Figure 3.22](#) for a view of a fully completed Material Screening record’s signature block.

*Note that up until the Closer Signature, the CA and QA signature can be modified by the user or an individual with Full Access.*
3.3.4 Revision

After a record has been closed. A new button option will appear at the top of the page.

Revise Record – Increment the Revision of the record and allow for another signature cycle; including the ability to make changes to any of the fields (See Figure 3.23).

3.4 Working with a QDM Record

For an example of the QDM .pdf report, see Appendix 1.

3.4.1 Creation

When Material Screening is selected as a record type (See Figure 3.2 in Section 3.1), the first screen seen after clicking “Create New SAM” will be shown (See Figure 3.24).
On this first screen, the following fields are available:

A. **Report Control Number**: Autofilled RCN from the creation page.
B. **Added Date**: Autofilled timestamp of when the record was created.
C. **Screening Letter Serial Number**: Serial Number of the Screening Letter instigating the screening
D. **Screening Letter Date**: Date of the Screening letter
E. **QDM Tasking Serial Number**: Serial Number of the document starting the QDM Tasking
F. **QDM Tasking Date**: Date of QDM Tasking
G. **Project (M)**: Project drop down. Consists of a list of Ships or other misc. projects material generally gets ordered for. If this list needs a new addition, contact the PDREP Help Desk (See Introduction)
H. **Material Received Date (M)**: Date that the material was received
I. **Location (M)**: Physical location of the material
J. **Action (M)**: Shipyard code that has cognizant action on this record
K. **Status (M)**: Record Status. Options are:

---

**Figure 3.24**

---
1. Accepted  
2. Awaiting Insp  
3. Awaiting Mat'l  
4. Cancel  
5. Closed  
6. Continual  
7. Hold  
8. In-Process  
9. Lab  
10. Not Started  
11. Partial Reject  
12. Rejected  
13. Repair  
14. SAD  
15. Superseded  
16. Supv Review  

L. NSN – National Stock Number of the material  
   1. COG  
   2. FSC (M)  
   3. NIIN (M)  
   4. SMIC  

M. Material Level Code (M): Material Level Code of the material  
N. Matl Description (M): Description of the material  
O. Part Number: Part number of the material (if applicable)  

The only buttons available at this stage are:  
A. **Save Record**: Saves the record – See Section 3.5.1  
B. **Spell Check**: Performs a spell check on all the text fields of the record – See Section 3.5.2  
C. **Lookup FSC**: Allows for FSC lookup of a NIIN. Same as on the previous page. – See Section 3.5.3  

After the first instance of the record saving, more fields and buttons will appear (See Figure 3.25a).
3.4.2 Editing

Figure 3.25a
The new fields available are as follows:

A. **Priority fields:** See Figure 3.25b for the Update Priority page.
   1. Need by date
   2. Priority 1
   3. Priority 2
   4. Priority 3

![Figure 3.25b](image)

B. **Requisition Number Information:**
   1. Unknown check box – If checked, no requisition number will be listed on the record. Either this must be checked, or a Requisition Number must be input.
   2. Requisition Number (M)
   3. Requisition Quantity
   4. Job Order
   5. Key Op

C. **Contract Number Information**
   1. Unknown check box – If checked, no contract number will be listed on the record. Either this must be checked, or a Contract Number must be input.
   2. Contract Number (M)
   3. Line Item # (M)
   4. Contract Units Received
   5. Deliver Order Number
   6. Units of Measure – Drop down with a variety of selections
   7. Purchase Order Number
   8. TDP or IRPOD Revision
   9. Vendor CAGE Code (Contracted Supplier)
   10. Manufacturer CAGE Code
D. Quantity Reported – Not Mandatory until Closer Signature  
E. Quantity Accepted – Not Mandatory until Closer Signature  
F. Quantity Rejected – Not Mandatory until Closer Signature  
The new buttons available are as follows:  
A. Add/View Attachments – See Section 3.5.4  
B. Notify Individual – See Section 3.5.5  
C. Action History – See Section 3.5.6  
D. Status History – See Section 3.5.7  
E. Exhibit Tracking – See Section 3.5.8  
F. Remarks Sheet – See Section 3.5.9  
G. Report – See Appendix 1  
H. Acceptability Tag – See Section 2.1.3  

Once requisition(s)/contract(s) have been entered onto the record, it will look similar to Figure 3.26

![Figure 3.26](image)

New buttons available in this section are as follows:  
A. Add Item: Saves the new Requisition or Contract Number Information (depending on which box it is being used in)  
B. Cancel Item Add: Deletes the existing typed-in values in either the Requisition or Contract Number Information (depending on which box it is being used in)  
C. Lookup Vendor CAGE: Allows users to perform a CAGE Search and insert it into the Vendor CAGE field see paragraph 3.5.13.
D. **Lookup MFG CAGE:** Allows users to perform a CAGE Search and insert it into the Manufacturer CAGE field see paragraph 3.5.13.

Click the Edit button on a requisition/contract row to edit those values
Click the Delete button on a requisition/contract row to delete that row.

**Note:** Deletion is required to modify the Document or Contract Number.

**Important:** Further fields are associated with contract numbers. Clicking the Edit button will present you with the following (See Figure 3.27 and Figure 3.28)

The additional fields are as follows:

A. Serial/Batch Number

B. Serial Batch Type – Drop down consisting of the following options:
   1. **B** – Batch Number
   2. **H** – Heat Number
   3. **L** – Lot Number
   4. **S** – Serial Number
The additional buttons are as follows:

A. **Add Item**: Save the Serial Batch Number / Serial Batch Type

B. **Cancel Item Add**: Deletes any typed-in values in the Serial Batch Number / Serial Batch Type field.

C. **Save Item**: Saves all edits to the Contract Line Item

D. **Cancel Item Edit**: Cancels all unsaved edits to the Contract Line Item

Serial/Batch Line Items will be visible on the completed record page.

If no SAD has been written for the record, it can be immediately closed once all mandatory fields have been filled in. For further information on SADs, see Chapter 4.

If a SAD has been written, an additional mandatory field gets added to the record.

- Technical Work Document Serial Number

**3.4.3 Signatures**

A. If a SAD has been written, an additional mandatory signature will be added to the record. This signature is called the Corrective Action (CA) signature and is used to signify that the Corrective Action(s) as noted in the SADs have been completed.

B. Corrective Action Signature can be signed by the following access levels:
   1. Inspector
   2. Supply
   3. Full

C. Once signed, all fields except Action and Status are locked from being further edited.

D. If any SAD has “QA Review Required” OR “Physical Inspection Required” selected, an additional mandatory signature will be added to the record. This is the QA Review Signature.

E. QA Review Signature can be signed by the following access levels:
   1. Inspector
   2. Full

F. Once all SADs and other mandatory signatures (if any) are signed, the record can be closed.

G. Closer Signature can be signed by the following access levels:
   1. Supply
   2. Full

See Figure 3.29 for a view of a fully completed QDM record’s signature block.

*Note that up until the Closer Signature, the CA and QA signature can be modified by the user or an individual with Full Access.*
3.4.4 Revision

After a record has been closed. A new button option will appear at the top of the page. Revise Record – Increment the Revision of the record and allow for another signature cycle; including the ability to make changes to any of the fields (See Figure 3.30).

3.5 Additional Functions & Pages

Buttons available on the Receipt Inspection Record Add/Edit page and their functionality are described below.

3.5.1 Save Record

Clicking this button saves the entries made on the page.

3.5.2 Spell Check

Clicking the Spell Check button will perform a spell check on the Description and Remarks 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.
3.5.3 Lookup FSC
Clicking the Lookup FSC button will open a page to search for FSCs (See Figure 3.31).
Use a known FSC or name to find the FSC
Click the Search button

![Figure 3.31](image)

After loading a list of FSCs that meet the criteria, click the Select button to fill that FSC into the FSC field on the record.

3.5.4 Add/View Attachments
The Add/View Attachment button allows uploading, viewing and deleting of attachments. To Add or View Attachments:

A. Click the Add/View Attachments button. The Upload Attachment Listing page shown in Figure 3.32 displays. This page will list any attachments that have been uploaded.

![Figure 3.32](image)

B. Click the Add New Attachment button to browse for the file to upload. The Upload Attachment(s) page shown in Figure 3.33 displays.
C. Follow the instructions on the page to upload an attachment. M denotes mandatory fields however all fields in this form are required in order to complete the upload. File types include: jpg, gif, bmp, doc, docx, txt, pdf, xls, xlsx, tif, png, zip, ppt, pptx.

D. Click Upload Attachment to complete the action. Click the Reset button to clear out unwanted entries, and click the Back Button to return to the Upload Attachment Listing page.

E. When the file has been successfully uploaded, it will display in the Upload Attachment Listing page (See Figure 3.34).

F. Click the Cancel button to return to the Receipt Inspection Record – Add/Edit page.
G. Clicking the Delete button will delete the attachment from the record.

H. Clicking the Edit button will allow for insertion of a Description or Comment to the Attachment (See Figure 3.35).

I. Click the Save Edit button to append the description and/or comment to the file.

J. Click the Cancel Edit button to cancel editing the description and comment.
3.5.5 Notify Individual

This button will display the SAM Email Notice page. See Figure 3.36. Click the cancel button to return to the SAM Record.

A. Select the code of the user who the notification will be sent to
B. Select the user from the list.

Note: In order to appear in the “Choose Email” drop-down, the Organization Code field on the user profile must be equal to one of the selections available. This can be modified by hovering over [your name] at the top right of any PDREP screen and selecting “Edit Profile”.

C. To add multiple users, select a user from the “Choose CC User” box and click the “Add CC” button

![Image of Notify Individual interface](Figure 3.36)
3.5.6 Action History
This button will display the SAM Action History (See Figure 3.37). Click the Back button to return to the SAM Record.

3.5.7 Status History
This button will display the SAM Status History (See Figure 3.38). Click the Back button to return to the SAM Record.
3.5.8 SAM Exhibit Tracking
To access SAM Exhibit Tracking, click the Exhibit Tracking button on the record page (See Figure 3.39).

Figure 3.39

3.5.8.1 Adding a New Exhibit
After entering RIMS Exhibit Tracking via the button, the Exhibit Tracking worklist will load. See Figure 3.40. To add a new exhibit to the record, press the Add Exhibit button.

Figure 3.40

After pressing the Add Exhibit button, the Exhibit Details page will load (See Figure 3.41). Input the information related to the exhibit on this page and press Save to save the information.
A. Fields in the Exhibit Details area are as follows:

1. **CAGE Code**: CAGE source of the deficient material.
2. **Contract Number + Contract No. not provided or is unknown checkbox**: One or the other of these needs to be filled out on the Exhibit record.
3. **PQDR Number**: The full PQDR RCN which includes DoDAAC.
4. **Exhibit Location**: Location of the deficient material.
5. **QTY DEF**: Quantity of deficient material.
6. **Remarks**: Enter additional information. **Do not enter NOFORN into this block**.

Saving the record will refresh the page and more buttons will be available (See Figure 3.42).
Some of these buttons will not appear for all users. For example, the Delete Exhibit button is not available for most users and is for those with Full Access. The action of these buttons is described below:

A. **Back**: Return to the SAM Record screen.
B. **Save**: Save the information entered on this screen.
C. **Close**: Close the Exhibit. Exhibit will be locked and cannot be further edited unless it is reopened.
D. **Add Shipment Tracking**: Record a shipment on the exhibit. See Section 3.5.8.2.
E. **Add/View Attachments**: Add/View attachments associated with the parent SAM Record
F. **Delete Exhibit**: Only available for Full Access. Delete the exhibit record.
G. **Reopen (not pictured)**: Only available for Full Access. Unlocks the exhibit record and it can be edited.
3.5.8.2 Adding a Shipment Tracking to an Exhibit

After creation of an exhibit, the Add Shipment Tracking button will now be available (See Figure 3.42). Click that button to begin adding a Shipment to the Exhibit.

Next, the Shipment Tracking screen will load (See Figure 3.43). Add all the relevant information about the shipment on this screen, and click the Add Shipment Tracking button at the bottom of the page.

Note: “Autofill Shipment Info” must be clicked for each DoDAAC/CAGE in order to load the address information.

The page will refresh and a few new buttons will appear on the bottom of the page. See Figure 3.44. The Update Shipment Tracking button saves any changes made to the page, and the Delete Shipment Tracking button will delete the Shipment.
Clicking on the Cancel button will return to the Exhibit Details page, but now the Shipment will be located on the bottom. See Figure 3.45. To view the shipment again, click the blue record number on the left hand side of the shipment row.

Fields on the Shipment Tracking screen are as follows:

A. **(M) Request Date:** Date the material was requested to be moved.
B. **(M) Shipped Date:** Date the material was taken from its location.
C. **(M) Quantity Shipped:** Quantity of the material moved.
D. **(M) Shipped From (DoDAAC/CAGE):** The DoDAAC or CAGE of the shipper. (ex: A Shipyard)

*Note: “Autofill Shipment Info” must be clicked for each DoDAAC/CAGE in order to load the address information*

E. **Shipped from Code/Shop:** The Shop or Code receiving the shipment.
F. **(M) Shipped to (DoDAAC/CAGE):** The DoDAAC or CAGE of the receiver. (ex: A Shipyard, NAVSUP, Vendor etc.)
Note: “Autofill Shipment Info” must be clicked for each DoDAAC/CAGE in order to load the address information

G. **Shipped to Code/Shop:** The Shop or Code receiving the shipment.
H. **Fund Code:** Fund code of the shipment.
I. **Document Code:** The type of document the material is being shipped on.
J. **(M) Carrier:** The carrier that is being used to ship the material.
K. **Standard Carrier Alpha Code:** A two-to-four letter identification used by the transportation industry to identify freight carrier in computer systems and shipping documents such as Bill of Lading, Freight Bill, and Packaging List. See Appendix 5 for list of common carriers.
L. **Locally Disposed:** Select if local disposal has been authorized.
M. **Exhibit Tracking Number:** Shipment carrier tracking number
N. **Shipping comments:** Any additional comments or remarks concerning the shipment. **Do not enter NOFORN into this box.**

Figure 3.45
3.5.8.3 Returning to the Exhibit Tracking Worklist

Back out one more time will return to the Exhibit Tracking worklist (See Figure 3.46). From there, you can add another exhibit if required, or return to the inspection record by hitting the Back button.

![Exhibit Tracking Worklist](image)

3.5.9 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.

A. Access the Remarks Sheet by clicking the Remarks Sheet button on any SAM Record.

B. Add a new remark by typing into the box labeled “Add Remark” and then hit the Save button. After hitting the Save button, the page now allows for signing of the remark to lock it down and keep its contents separate from the other remarks associated with the record.

C. Signatures function identically as on the SAM Record (See Appendix 2). Remarks must be signed for the SAM record to be closed.

D. Return to the record by hitting the Back button.
3.5.10 SAD Worklist

Clicking the SAD Worklist button will redirect to the SAD Worklist page for the SAM Record (See Figure 3.48). Click the Back button to return to the SAM Record. See Chapter 4 for working with SADs.
3.5.11 Cancelling a Record
To cancel any type of SAM record, the mandatory fields must be filled in, the status must be set to “CANCEL”, and the closer signature must be signed.

3.5.12 SAM Clone
Cloning a SAM record is a way to create a new SAM record with the same base info as another SAM record. To access SAM clone, select SAM Clone on the main menu flyout, or click the SAM Clone tab once in SAM. (See Figure 3.49 and Figure 3.50)

Once on the SAM Clone screen, enter the 6 digit number that follows the DoDAAC in the SAM RCN or a requisition/document number. SAM records can only be cloned from existing records within the user's DoDAAC (See Figure 3.51).
Once Search is clicked, one of two actions will occur:

A. If there is only one record with the requisition/document number, the Create New SAM page will load with the basic information filled in from the selected record.

B. If there are multiple records with the requisition/document number, a list will show the available records to clone. Click the RCN of the record to initiate the cloning just like above (See Figure 3.52).

For more information on how to create SAM Records once a clone has taken place, see Section 3.1-3.4 regarding how to create each type of SAM Record. SAM Records will clone as the same type as the parent record.

3.5.13 Lookup CAGE

Vendor and Manufacturer CAGE codes utilized in the application are validated against the PDREP database. The Lookup Cage button allows the user to lookup vendor information either by CAGE Code or vendor/manufacturer name. When a CAGE is selected from the lookup page, it populates the field associated with the button. Partial searches are supported. Enter either a CAGE or Name and click the search button.
Figure 3.53 illustrates the Lookup CAGE Code functionality with a result set. Click the Select CAGE Code to add it to the CAGE field on the SAM Record that the lookup was associated with (Vendor / Manufacturer).

4 Working with SADs

4.1 Adding and Editing a SAD

The Supply Action Deficiency (SAD) is a means of communication used to resolve any questions or issues the user may have. All SADs must be closed on a MIR before the record can be closed.

To add a SAD, click the Add SAD button which is available on the SAD worklist. Figure 4.1 is an example of a blank SAD.

Note: Users familiar with the Receipt Inspection Management System can compare the SAD functionality to that of the RIDL functionality.
Figure 4.1
4.1.1 Enter SAD Condition

Complete the Condition section: enter a description of the condition, and check the Condition Locked indicator box. Click the Save Condition button.

The user will automatically be re-directed to the Action Routing for SAD page (See Figure 4.2) after locking and saving a Condition or Resolution. This page can also be displayed at any time by clicking the Who has the Next Action button.

If an action is complete, check the Action Complete box and click Save.

Select the recipient for the Next Action and a Description from the dropdowns. A new line for action will be generated upon clicking the Save button, and existing lines may be deleted by clicking the Delete button.

![Figure 4.2](image)

The Status of the SAM Record may be changed from this page. Select a Status and click Save Status. Note that the Save button on this screen does not save a Status. Status changes will be reflected in the Status History page for the record (see Section 3.5.7).

Click the Back button to return to the SAD.

The Resolution fields will now be enabled for the SAD (See Figure 4.3).
The Save Condition button is now replaced by an Unlock Condition button. If the Condition is unlocked, the Resolution fields will return to a disabled state. A Condition will have to be locked and saved again (See Figure 4.4).
### 4.1.2 Enter a SAD Resolution

Before the Resolution can be edited, the SAD Condition must be locked and saved (See Figure 4.4). Completing the Resolution section of the SAD is nearly identical to completing the Condition section. A Resolution can be saved before being locked in order to save the text and Resolution fields entered. Locking and saving the Resolution page will direct the user to the Action Routing for RIDL page. Figure 4.5 displays a Locked Condition and Resolution.

![Figure 4.5](image)
4.1.3 Close a SAD

All of the Actions must be marked complete on the Action Routing for SAD page in order to close the SAD.

The SAD may be closed by clicking the Close SAD button.

Once a SAD is closed, it may not be unlocked and is not editable (read-only). The Action Routing for SAD page is not editable (read-only). Reports can still be generated and email notifications can still be sent. Figure 4.6 shows a SAD Closer signature.

![Authorized Corrective Action(s) Complete](image)

Figure 4.6

4.2 SAD Tools

Buttons on the SAD page provide access to additional functionality. These functions are described below.

4.2.1 Add/View Attachments

The Add/View Attachment button allows uploading, viewing and deleting of attachments. Attachments on SADs are unique to the SAM Record, not each SAD specifically. Functionality is described in Section 3.5.4.

4.2.2 Report

Clicking the Report button displays the SAD .pdf Report. Although the Report button exists on each individual SAD, the report contains data from all SADs for the SAM Record.

4.2.3 RIDL Worklist

Click the SAD Worklist button for a list of SADs associated with the SAM record. The SAD Worklist is described in section 3.5.10.

4.2.4 Notify Individual

The Notify Individual button displays the SAM Email Notice page (See Section 3.5.5).

*Note: In order to appear in the “Choose Email” drop-down, the Organization Code field on the user profile must be equal to one of the selections available. This can be modified by hovering [your name] at the top right of any PDREP screen and selecting “Edit Profile”.*
4.2.5 Who Has Next Action

The Who Has Next Action button was described in Section 4.1.1.

4.3 SAM SAD REQUIRING ACTION

4.3.1 Accessing the SAD Requiring Action Page

To access this screen, either select SAM SAD Requiring Action from the main menu flyout, or click the SAM SAD Requiring Action tab once in SAM (See Figure 4.7 & Figure 4.8).

4.3.2 Using SAM SAD Requiring Action

SAM SAD Requiring Action contains the following criteria fields: (See Figure 4.9)

A. The “Status” selection box will display only the records for the specified status.
B. The date range for the Worklist defaults to the present date minus one year but can be changed if needed.
C. To search by Document or Requisition Number, the full document number or a partial number may be entered. A search on a partial value will return results.
D. To search by Contract Number, the full Contract Number or a partial number may be entered. A search on a partial value will return results.
E. Options in the Action field are the available shipyard codes plus the ALL option
F. Options in the Matl Level Code dropdown are: QA1, QA2, QA3, or QA4 (non-nuclear) and A, C, D, E, or G (nuclear). The Matl Level Codes defaults to blank.
G. The Sort field allows you to specify the order by which the results should be displayed. Sort options are: Added Date – Ascending, Added Date – Descending, MIR Serial Number, Status, Material Level, Action, and Contract Number.
H. When you have selected the criteria, click “Display Worklist” to view all RIM records matching the criteria entered. A sample set of results is illustrated in Figure 2.3.

I. Any of the fields in the search results can be sorted in ascending or descending order by clicking on that field heading.

<table>
<thead>
<tr>
<th>RCN Number</th>
<th>Record Type</th>
<th>Item Number</th>
<th>Mat Level</th>
<th>Mat Description</th>
<th>Project</th>
<th>Orig Date</th>
<th>Has Action</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>180021</td>
<td>MA</td>
<td>1</td>
<td>E</td>
<td>TEST TEST</td>
<td>PC-5 TYPHOON</td>
<td>07/09/2018</td>
<td>2305.2</td>
<td>SAD</td>
</tr>
<tr>
<td>180021</td>
<td>MA</td>
<td>1</td>
<td>E</td>
<td>TEST TEST</td>
<td>PC-5 TYPHOON</td>
<td>07/09/2018</td>
<td>2305.2</td>
<td>SAD</td>
</tr>
</tbody>
</table>

Figure 4.9

Once all criteria are input, press the Display Worklist button to return a list of SAD records that meet the search criteria.

To access a SAD from the list, click on the RCN of the parent SAM record.

5 Searching the SAM Database

5.1 SAM APL/QPL Search

SAM contains a search tool for searching APL/QPL records.

5.1.1 Accessing SAM APL/QPL Search

To access this screen, either select SAM Search from the main menu flyout, or click the SAM Search tab once in SAM (See Figure 5.1 and Figure 5.2).
5.1.2 Using SAM APL/QPL Search

APL/QPL Search contains the following criteria fields: (See Figure 5.3)

A. DoDAAC – Can select “All” to pull back records from all locations.
B. Revision Type
C. Start Date
D. End Date
E. Status
F. Action
G. Requisition No.
H. Contract No.
I. NIIN
J. FSC
K. Mfr CAGE Code
L. Lab Test No.
M. Matl Description
The fields marked with an (M) are considered mandatory. To search, all mandatory fields plus an additional field of any type are required.

Once all criteria are input, press the Search button to return a list of APL/QPL records that meet the search criteria.

The Matl Description field uses “wildcard” search functionality where it will return all items that have what was typed into the field.
5.2 SAM AdHoc

5.2.1 Accessing SAM AdHoc

To access the SAM AdHoc report, either select SAM Adhoc from the main menu flyout, or click the SAM AdHoc tab once in SAM (See Figure 5.4 and Figure 5.5). Figure 5.6 illustrates the default display of the SAM AdHoc Report interface. Instructions on the screen provide additional direction for using the interface for query development.

![Figure 5.4](image_url)

![Figure 5.5](image_url)

![Figure 5.6](image_url)
5.2.2 Using SAM AdHoc

Please refer to the AdHoc Search Tool User Guide for assistance using the SAM AdHoc Tool.

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.

The Product Data Reporting and Evaluation Program (PDREP) ADHOC Search Tool User Guide can be located at: https://www.pdrep.csd.disa.mil/pdrep_files/reference/guides_manuals/guides_manuals.htm (See Figure 5.6) or can be found by clicking the selection for user guides under the help menu on the top of any PDREP window (See Figure 5.7).
6 SUMMARY

This concludes the instruction for working with the SAM module of the PDREP application. 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
Appendix 1 – Report Views

**Note:** Nuclear SAM Reports will be accompanied by a “NOFORN” Label on the top and bottom of the report.

1. APL/QPL

<table>
<thead>
<tr>
<th>REQUISITION NUMBER</th>
<th>REQUISITION QUANTITY</th>
<th>JOB ORDER</th>
<th>KEY OP</th>
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</thead>
<tbody>
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<td>122456</td>
<td>1</td>
<td>123</td>
<td>456</td>
</tr>
<tr>
<td>789123</td>
<td>1</td>
<td>123</td>
<td>456</td>
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<table>
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<th>PROJECT</th>
<th>QA CODE</th>
<th>MAT'L RECEIVED DATE</th>
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</thead>
<tbody>
<tr>
<td>BULK R1</td>
<td>A</td>
<td>07/16/2019</td>
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</table>

<table>
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<tr>
<th>COG</th>
<th>FSC</th>
<th>NIIN</th>
<th>SMIC</th>
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<td>1111111111</td>
<td>L1</td>
<td></td>
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<table>
<thead>
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<table>
<thead>
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<table>
<thead>
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<th>CONTRACT ITEM NUMBER</th>
<th>CASE CODE</th>
<th>MFR CASE CODE</th>
<th>QUANTITY</th>
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<td>CPARS</td>
<td></td>
<td>1</td>
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<td>-supply: authorized signature/date</td>
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<tr>
<td>user's digital signature &amp; date</td>
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<table>
<thead>
<tr>
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<tr>
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<th>DISPOSITION</th>
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<td>Material Disposition</td>
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<table>
<thead>
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<tr>
<td>user's digital signature &amp; date</td>
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<table>
<thead>
<tr>
<th>CLOSER: authorized signature/date</th>
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<tr>
<td>user's digital signature &amp; date</td>
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2. Material Assessment

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<tbody>
<tr>
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<td>A</td>
<td>07/17/2018</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
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<th>SMIC</th>
</tr>
</thead>
<tbody>
<tr>
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<td>111111111</td>
<td>L1</td>
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**MATERIAL DESCRIPTION**

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<th>CONTRACT ITEM NUMBER</th>
<th>CAGE CODE</th>
<th>MFR CASE CODE</th>
<th>QUANTITY</th>
</tr>
</thead>
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<td>CPARS</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

**TECHNICAL WORK DOCUMENT SERIAL NUMBER**

123456789

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<th>QUANTITY ACCEPTED</th>
<th>QUANTITY REJECTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

**CORRECTIVE ACTION COMPLETE:** AUTHORIZED SIGNATURE/DATE

**QA REVIEW:** PHYSICAL INSPECTION REQUIRED

**The person signing for an action verifies, based on personal observation, certified records of direct report from watchstanders, and certifies by their signature that the action has been performed in accordance with the specified requirements.**

**CLOSE:** AUTHORIZED SIGNATURE/DATE


3. Material Screening

<table>
<thead>
<tr>
<th>SCREENING SERIAL NUMBER</th>
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<th>QM TASKING SERIAL NUMBER</th>
<th>QM TASKING DATE</th>
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<th>PROJECT</th>
<th>QA CODE</th>
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**MATERIAL DESCRIPTION**

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**TECHNICAL WORK DOCUMENT SERIAL NUMBER**

123456

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**CORRECTIVE ACTION COMPLETE:** AUTHORIZED SIGNATURE/DATE

**QA REVIEW:** PHYSICAL INSPECTION REQUIRED

**The person signing for an action verifies, based on personal observation, certified records of direct report from watchstanders, and certifies by their signature that the action has been performed in accordance with the specified requirements.**

**CLOSE:** AUTHORIZED SIGNATURE/DATE

[User Digital Signature] [Date]
4. QDM

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<td>[User Digital Signature] [Date]</td>
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<td>PHYSICAL INSPECTION REQUIRED</td>
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<td></td>
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<tr>
<td>[User Digital Signature] [Date]</td>
<td></td>
</tr>
<tr>
<td>** The person signing for an action verifies, based on personal observation, certified records or direct report from watchstanders, and certifies by their signature that the action has been performed in accordance with the specified requirements.</td>
<td></td>
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<tr>
<td>CLOSER: AUTHORIZED SIGNATURE/DATE</td>
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</tr>
<tr>
<td>[User Digital Signature] [Date]</td>
<td></td>
</tr>
</tbody>
</table>
Appendix 2 – Digital Signatures

Digital Signatures are used across the SAM Module to sign off the various signatures required for each step on a SAM Record. For the SAM Records themselves, they are CAC-enabled digital signatures that use the certificate from the CAC that is used to log-in to the PDREP system, and for SADs, they are plain signatures that do not use the CAC and are based off the user's PDREP profile.

When performing a CAC-enabled digital signature, a Signature Confirmation screen displays (See Figure A2.1)

Instructions
By clicking on the "Sign" button below, you are confirming the following:
1. That your are lawfully using the network you are on
2. You are logged into SAM as yourself(e.g. not using another users account)
3. You are authorized to electronically sign an attribute in RIMS
4. You understand that you are electronically signing this attribute in SAM when you hit the "Sign" button below

I acknowledge having read, understood, and fully agreed with the above statement

Sign  Cancel

Figure A2.1

To perform the signature, the checkbox must be checked, and the user must click Sign.
### Appendix 3 – Common Standard Carrier Alpha Codes

<table>
<thead>
<tr>
<th>SCAC</th>
<th>Carrier name</th>
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<tbody>
<tr>
<td>MSCU</td>
<td>MEDITERRANEAN SHIPPING COMPANY</td>
</tr>
<tr>
<td>ALLV</td>
<td>ALLIED VAN LINES</td>
</tr>
<tr>
<td>ARFW</td>
<td>AMERICAN FREIGHTWAYS</td>
</tr>
<tr>
<td>BAXG</td>
<td>BAX GLOBAL</td>
</tr>
<tr>
<td>BNAF</td>
<td>BAX GLOBAL (air)</td>
</tr>
<tr>
<td>CBNP</td>
<td>CARBONITE LOGISTICS</td>
</tr>
<tr>
<td>CDNK</td>
<td>Celadon</td>
</tr>
<tr>
<td>CMDU</td>
<td>CMA CGM</td>
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<tr>
<td>COSU</td>
<td>Coscon Container Lines</td>
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<tr>
<td>COTO</td>
<td>Country Transport</td>
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<tr>
<td>ELOI</td>
<td>Ease Logistics</td>
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<tr>
<td>CSXT</td>
<td>CSX TRANSPORTATION</td>
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<tr>
<td>CWCE</td>
<td>CON-WAY CENTRAL EXPRESS</td>
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<tr>
<td>CWIM</td>
<td>CON-WAY INTERMODAL</td>
</tr>
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<td>CWSE</td>
<td>CON-WAY SOUTHERN EXPRESS</td>
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<tr>
<td>CWWE</td>
<td>CON-WAY WESTERN EXPRESS</td>
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<tr>
<td>DMLI</td>
<td>Diamond Logistics</td>
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<tr>
<td>DOLR</td>
<td>DOT-LINE TRANSPORTATION</td>
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<td>EGLV</td>
<td>Evergreen</td>
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<td>EWCF</td>
<td>EMERY WORLDWIDE</td>
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<td>EXPD</td>
<td>Expeditors International Ocean</td>
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<td>FDCC</td>
<td>FedEx Custom Critical</td>
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<tr>
<td>FDEG</td>
<td>FEDEX GROUND</td>
</tr>
<tr>
<td>FDEN</td>
<td>FEDEX (AIR)</td>
</tr>
<tr>
<td>FXFE</td>
<td>FedEx Freight</td>
</tr>
<tr>
<td>FLJF</td>
<td>FLT LOGISTICS LLC</td>
</tr>
<tr>
<td>FXFE</td>
<td>FedEx LTL Freight East</td>
</tr>
<tr>
<td>FXFW</td>
<td>FedEx LTL Freight West (formerly VIKN - Viking)</td>
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<tr>
<td>FXNL</td>
<td>FedEx Freight National (formerly Watkins)</td>
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<td>GMLS</td>
<td>R and L Carriers</td>
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<tr>
<td>GPTC</td>
<td>G &amp; P Trucking, Inc.</td>
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<tr>
<td>HOYO</td>
<td>HOYER Deep Sea</td>
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<tr>
<td>INML</td>
<td>INTERMODAL SERVICES</td>
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<tr>
<td>KHNN</td>
<td>KUEHNE + NAGEL</td>
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<td>SNLU</td>
<td>Schneider National</td>
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<tr>
<td>SUDU</td>
<td>Hamburg Süd</td>
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<tr>
<td>SWFT</td>
<td>SWIFT TRANSPORTATION</td>
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<tr>
<td>TCKM</td>
<td>Truckers America</td>
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<td>TPNW</td>
<td>Triple A Logistics</td>
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<td>TRKU</td>
<td>TURKON LINE INC</td>
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<td>UDRY</td>
<td>USAW - USA Logistics</td>
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<td>UPGF</td>
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<td>U.S. Northwest Express or USNW Express</td>
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