DCMA Surveillance Plan (SP) Records

User Guide
28 MAY 2025

1 Contents

FOREWORD

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

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

REFERENCES

- Acquisition.gov – Product and Service Code Manual
- DCMA Instruction 2301 – Contractor Effectiveness
- DCMA Manual 2301-05 – NSEP
- DCMA Instruction 2303 – Surveillance
- DCMA Manual 2303-01 – Surveillance
- DCMA Manual 2301-01 – Contractor Business Systems
- DCMA Manual 2301-07 – Contract Safety
- DCMA Instruction 2302 – Small Business
- DCMA Manual 2302-01 – Small Business
- DoD Instruction 5000.79 – Defense-wide sharing and use of Supplier and Product Performance Information
- NAVSO P3683D – Product Data Reporting and Evaluation Program (PDREP)
- Resource Page found: 2303-01 "Surveillance" (sharepoint-mil.us) (DCMA Members Only)
- SECNAVINST 4855.5C – Product Data Reporting and Evaluation Program (PDREP)

INTRODUCTION

This document is intended to guide personnel in the use of Product Data Reporting and Evaluation Program – Automated Information System (PDREP-AIS) Surveillance Plan module.
The PDREP-AIS is accessible via the Product Data Reporting and Evaluation Program home page: https://www.pdrep.csd.disa.mil/

Getting Access

- **First Time Users**

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

- **Existing PDREP Users**

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

Contact us

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

Additional Resources available on the NSLC Portsmouth Homepage

In order to aid PDREP-AIS users, reference these additional resources as needed:
FAQ – On the PDREP website under References, the Frequently Asked Questions page gives quick answers to the most commonly received inquiries. Your question(s) may be easily answered there.

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

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

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

1 SURVEILLANCE PLAN ACCESS

Surveillance Plan (SP) module access is based on a user's requested role as well as the functional capabilities listed in **Table 1.1**.

1.1 Access Levels Functions

Table 1.1

Role	Plan	Scheduler	Records
NO ACCESS	If a user does not have access to the PDREP-SP application, the program link will not appear on the user's PDREP-AIS Main Menu.	If a user does not have access to the PDREP-SP application, the program link will not appear on the user's PDREP-AIS Main Menu.	If a user does not have access to the PDREP-SP application, the program link will not appear on the user's PDREP-AIS Main Menu.
VIEW ACCESS	• View Plan • Access Plan • Ad Hoc Reports • View Attachments • Send Correspondence • View History	• Access Scheduler • View Schedule • Ad Hoc Reports • View Record • Export Schedule (download)	• Access Records • View Record • Ad Hoc Reports • View Attachments • Access IDR Table
Functional Specialist (FS)	**View Access Plus:** • Create a Plan • Edit Plan Details • Archive a Plan • Activate a Plan • Add/Edit/Delete Attachments • Add a KCR • Edit a KCR • Assign FS to KCR (same Team) • Remove FS from KCR (same Team)	**View Access Plus:** • Cancel Occurrence (own) • Reschedule (own) Occurrence • Create Record (own) • Complete Record (own) • Mass Cancel (own)	**View Access Plus:** • Edit Record (own) • Complete Record (own) • Send Message for Review Record (own) • Edit IDR (own) • Complete IDR (own) • Add/Edit/Delete Record and IDR Attachments

Role	Plan	Scheduler	Records
Team Lead Non-Supervisor	**FS Access Plus:** • Acquire Plan (Record Locked) • Release Plan (Record Locked)	**FS Access Plus:** • Cancel Occurrence (same Team) • Reschedule Occurrence (same Team) • Mass Cancel (same Team)	**FS Access Plus:** • Reopen Record (same Team) • ReAssign Draft Record (same Team) • Reopen IDR (same Team) • ReAssign Draft IDR (same Team)
Supervisor/ Contract Management Office (CMO)	**FS Access Plus:** • Acquire Plan (Record Locked) • Release Plan (Record Locked) • Assign FS to KCR (same DoDAAC) • Remove FS from KCR (same DoDAAC)	**FS Access Plus:** • Cancel Occurrence (same DoDAAC) • Reschedule Occurrence (same DoDAAC) • Mass Cancel (same DoDAAC)	**FS Access Plus:** • Create On-Demand Record • Delete Draft Record (same DoDAAC) • Reassign Draft Record (same DoDAAC) • Reopen Record (same DoDAAC) • Delete Draft IDR (same DoDAAC) • Reassign Draft IDR (same DoDAAC) • Reopen IDR (same DoDAAC)
Full Access	**FS Access Plus:** • Acquire Plan (Record Locked) • Release Plan (Record Locked) • Assign FS to KCR • Remove FS from KCR • Delete KCRs that do not have child Records	**FS Access Plus:** • Cancel Occurrence • Reschedule Occurrence • Mass Cancel	**FS Access Plus:** • Create On-Demand Record • Delete Draft Record • Reassign Draft Record • Reopen Record • Delete Draft IDR • Reassign Draft IDR • Reopen IDR

1.2 Accessing SP

Once a user has logged in, the PDREP Homepage will populate as seen in **Figure 1.1**. Not all options displayed in **Figure 1.1** are available to all users. Users must have permission to access each module in their profile or the module link will not be visible. The PDREP Home Page will also reflect a list of all recently accessed record types (Surveillance Plan, CAR, PQDRs and LODs). These Records will display on the right side of the page and will take the user to the selected record if clicked.

Note: *Please refer to the PDREP User Access Request and Login Procedures user guide found on the website for additional details.*

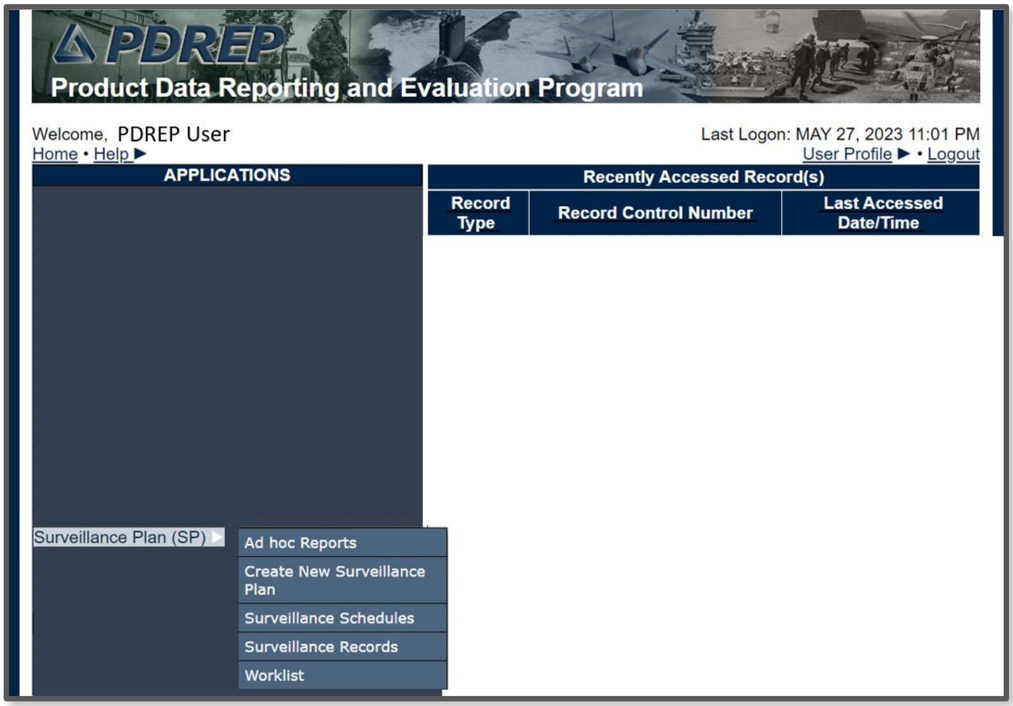


Figure 1.1

To access specific portions of the Surveillance Plan (SP) module, hover over the Surveillance Plan option in the menu and a list of webpage options will be available (**Figure 1.2**).

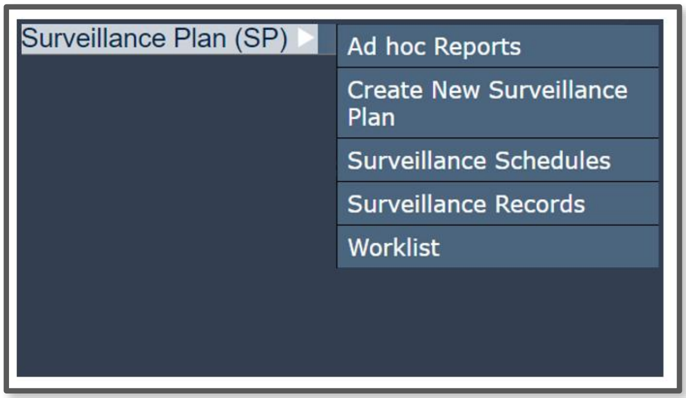


Figure 1.2

2 SURVEILLANCE PLAN WORKLIST

2.1 Accessing the SP Worklist

To load the Surveillance Plan Worklist, hover over the Surveillance Plan program link and select "Worklist" from the fly out menu (**Figure 2.1**). From there the SP Worklist will display. For those users already working in the SP module, select the "Surveillance Plan Worklist" tab at the top of the page (**Figure 2.2**).

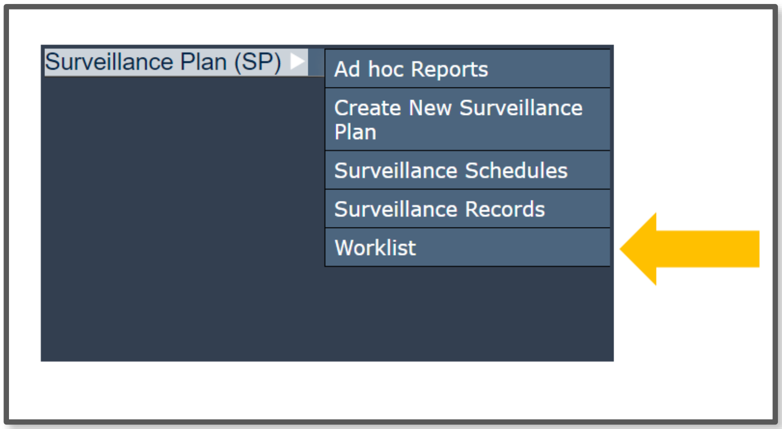


Figure 2.1

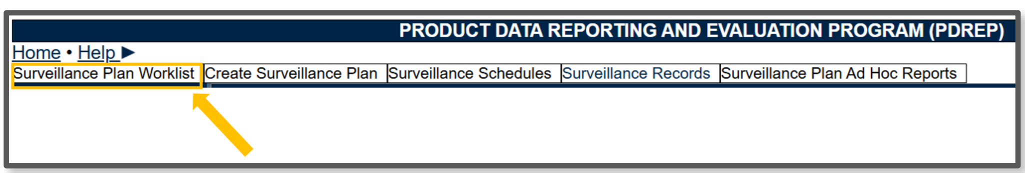


Figure 2.2

2.2 Generating a Worklist

To generate a Worklist, start by selecting what type of Worklist will be used from the "Worklist Type" drop-down (KCR, KTR Details, and Records). The tool automatically defaults to the "KTR Details" view as shown in **Figure 2.3**.

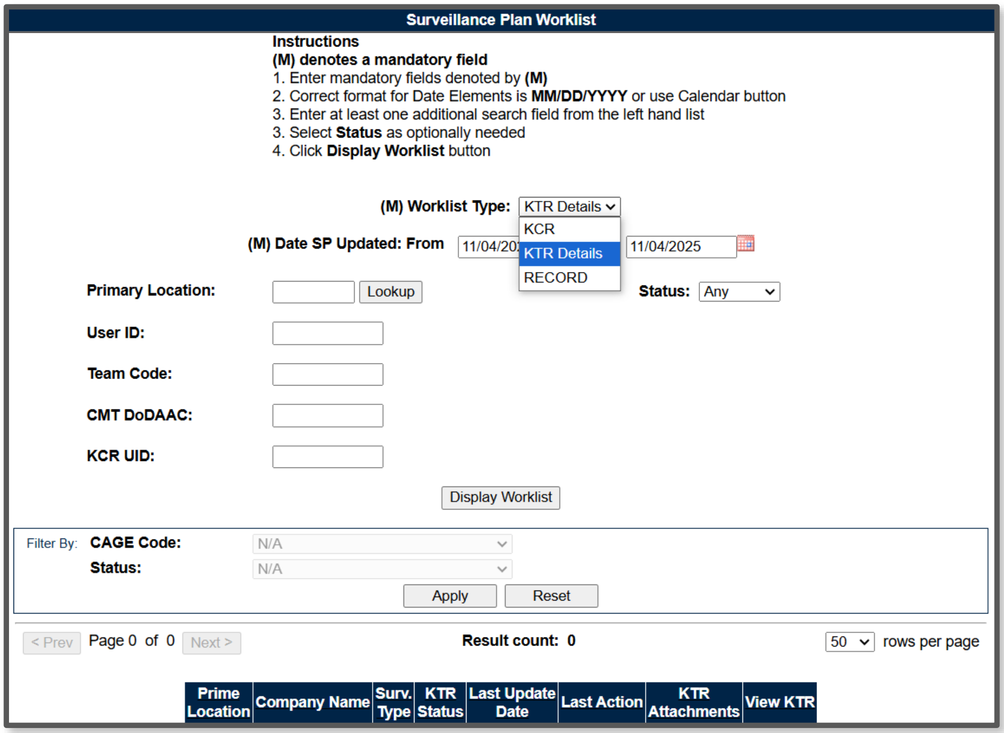
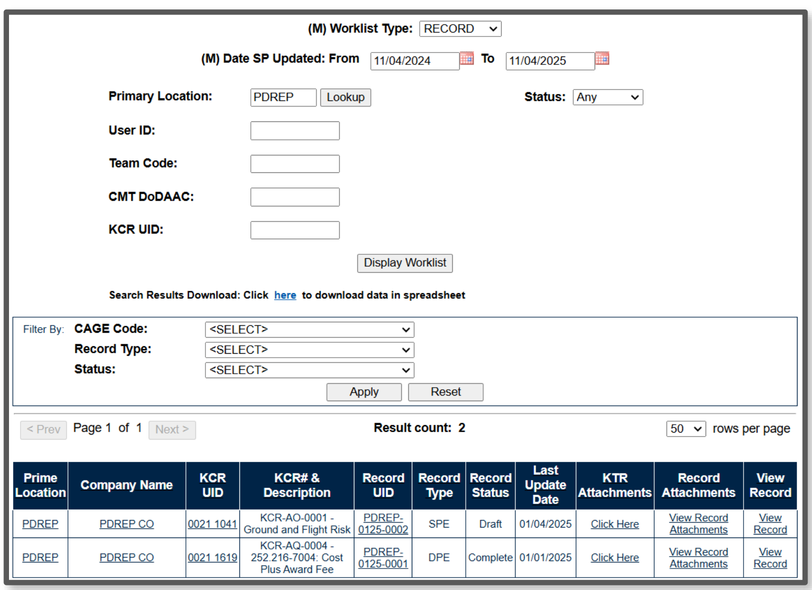


Figure 2.3

When a user selects a change in worklist type, the page will refresh to the appropriate view for the selection made. Enter data element(s) and click “Display Worklist” to show results. The returned Worklist will generate at the bottom of the page, beneath the filters. An example of this is depicted in **Figure 2.4**.

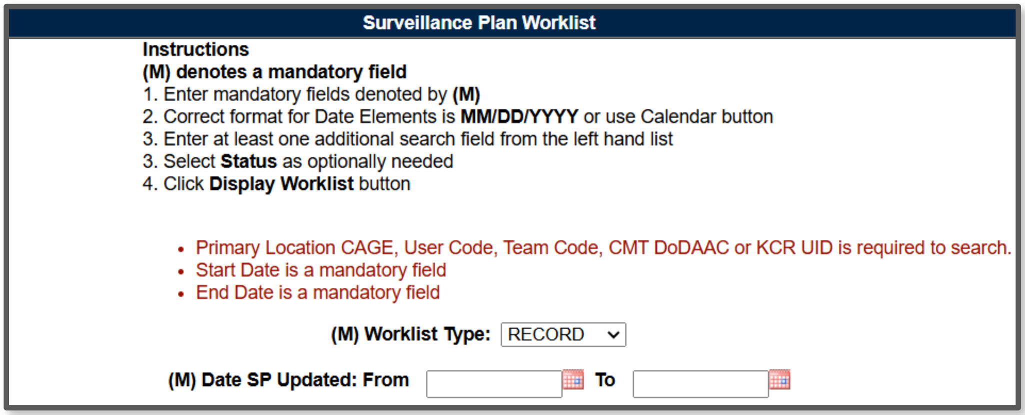


Prime Location	Company Name	KCR UID	KCR# & Description	Record UID	Record Type	Record Status	Last Update Date	KTR Attachments	Record Attachments	View Record
PDREP	PDREP CO	0021 1041	KCR-AO-0001 - Ground and Flight Risk	PDREP-0125-0002	SPE	Draft	01/04/2025	Click Here	View Record Attachments	View Record
PDREP	PDREP CO	0021 1619	KCR-AQ-0004 - 252.216-7004: Cost Plus Award Fee	PDREP-0125-0001	DPE	Complete	01/01/2025	Click Here	View Record Attachments	View Record

Figure 2.4

Mandatory fields are identified with a **(M)**. Worklist results generate after all mandatory fields are satisfied and at least one additional search field (Primary Location, User ID, Team Code, CMT DoDAAC, or KCR UID) is entered.

Though additional search data fields are not mandatory, the use of at least one is required to populate a returned Worklist. When a mandatory field is missing or an additional search field has not been used, an error message will display. An example of this is shown in **Figure 2.5**.



Surveillance Plan Worklist

Instructions
(M) denotes a mandatory field
1. Enter mandatory fields denoted by **(M)**
2. Correct format for Date Elements is **MM/DD/YYYY** or use Calendar button
3. Enter at least one additional search field from the left hand list
3. Select **Status** as optionally needed
4. Click **Display Worklist** button

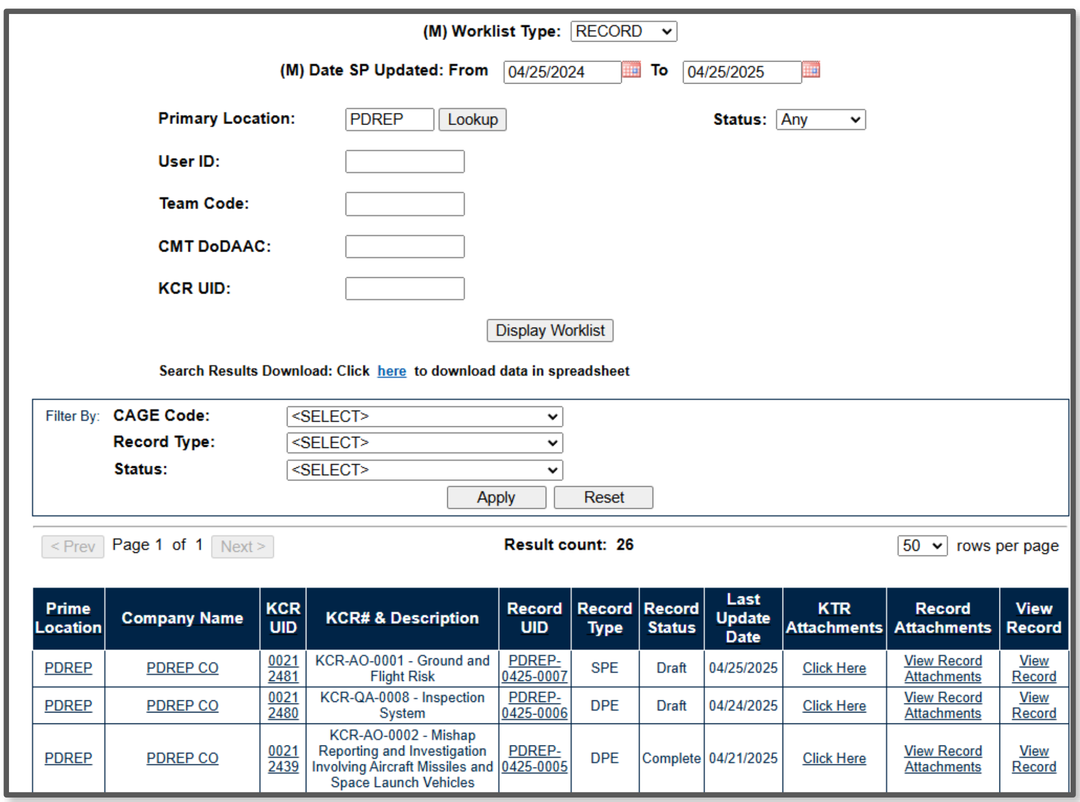
- Primary Location CAGE, User Code, Team Code, CMT DoDAAC or KCR UID is required to search.
- Start Date is a mandatory field
- End Date is a mandatory field

(M) Worklist Type: RECORD

(M) Date SP Updated: From To

Figure 2.5

Searches may be refined by using a combination of additional data fields, filters or changing the date range. The "(M) Date SP Updated" date range defaults to 365 days from "todays" date but may be adjusted to limit or expand Worklist results. Filtering capabilities as shown in **Figure 2.6**, are accessible only after a Worklist is generated.



(M) Worklist Type: RECORD

(M) Date SP Updated: From 04/25/2024 **To** 04/25/2025

Primary Location: PDREP Lookup **Status:** Any

User ID:

Team Code:

CMT DoDAAC:

KCR UID:

Display Worklist

Search Results Download: Click here to download data in spreadsheet

Filter By: **CAGE Code:** <SELECT>
Record Type: <SELECT>
Status: <SELECT>
Apply Reset

< Prev Page 1 of 1 Next > **Result count: 26** 50 rows per page

Prime Location	Company Name	KCR UID	KCR# & Description	Record UID	Record Type	Record Status	Last Update Date	KTR Attachments	Record Attachments	View Record
PDREP	PDREP CO	0021 2481	KCR-AO-0001 - Ground and Flight Risk	PDREP-0425-0007	SPE	Draft	04/25/2025	Click Here	View Record Attachments	View Record
PDREP	PDREP CO	0021 2480	KCR-QA-0008 - Inspection System	PDREP-0425-0006	DPE	Draft	04/24/2025	Click Here	View Record Attachments	View Record
PDREP	PDREP CO	0021 2439	KCR-AO-0002 - Mishap Reporting and Investigation Involving Aircraft Missiles and Space Launch Vehicles	PDREP-0425-0005	DPE	Complete	04/21/2025	Click Here	View Record Attachments	View Record

Figure 2.6

Search Fields for all Worklist Types in **Figure 2.6**

- **(M) Worklist Type:** A drop-down where a user can choose to view information specified at the KCR, KTR, or RECORD levels.
- **(M) Date SP Updated: From:** Defaulting to “todays” date, this is the first date in the specified date range. This date may be edited to increase or decrease for user-specific search criteria.
- **(M) Date SP Updated: To:** Defaulting to 365 days from “todays” date, this is the final date (end point) in the specified date range. This date may be edited to increase or decrease for user-specific search criteria.
- **(M) Primary Location:** The Commercial and Government Entity (CAGE) Code of the contractor associated with the Surveillance Plan. This field is restricted to five alphanumeric characters and validates against the PDREP database.
- **(M) User ID:** Returns Surveillance Plan(s) created by the User ID entered. User ID is located on the user profile page (top right link of any PDREP window).
- **(M) Team Code:** A series of one to five alphanumeric characters distinguishing the location of the Team within a Region (Ex: EXTAB or TDM). Returns Surveillance Plan(s) created by users from the team code entered.
- **(M) CMT DoDAAC:** The Department of Defense Activity Address Code (DoDAAC) of the user’s unit, activity, or organization. Returns CAGE Codes associated to the DoDAAC entered based off information provided by DLA.
- **(M) KCR UID:** The unique identifying number of a KCR. Full or partial KCR UIDs may be added to search. Partial UID number are searchable by excluding the zeros leading up to the first whole number (ex. UID# 0000 0123 may be searched as 123).
- **Status:** Drop-down list with options based on the Worklist Type selected.
    - **KCR** (selected worklist type)
        - *Any:* Includes all KCR types regardless of active or inactive statuses.
        - *Active:* KCR engaged in active oversight.
        - *Inactive:* KCR no longer engaged in active oversight.
    - **KTR Details** (selected worklist type)
        - *Any:* Includes all Plan types regardless of active or archived statuses.
        - *Active:* A Plan engaged in ongoing surveillance.
        - *Archived:* A Plan for where surveillance is not currently being performed.
    - **Record** (selected worklist type)
        - *Any:* Includes all Record types regardless of complete or draft statuses.
        - *Complete:* A finalized record that has been marked “complete” and requires no further action.
        - *Draft:* An unfinished record that is still in progress.

Associated Button Functionality for **Figure 2.6**

- **Lookup:** 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 Company Name.

To search, enter the desired (CAGE) Code or Company (Name) on the Lookup CAGE Page and select the “Search” button to generate results. Enter either a CAGE or Name and click the “Search” button. The search supports both full and partial entries.

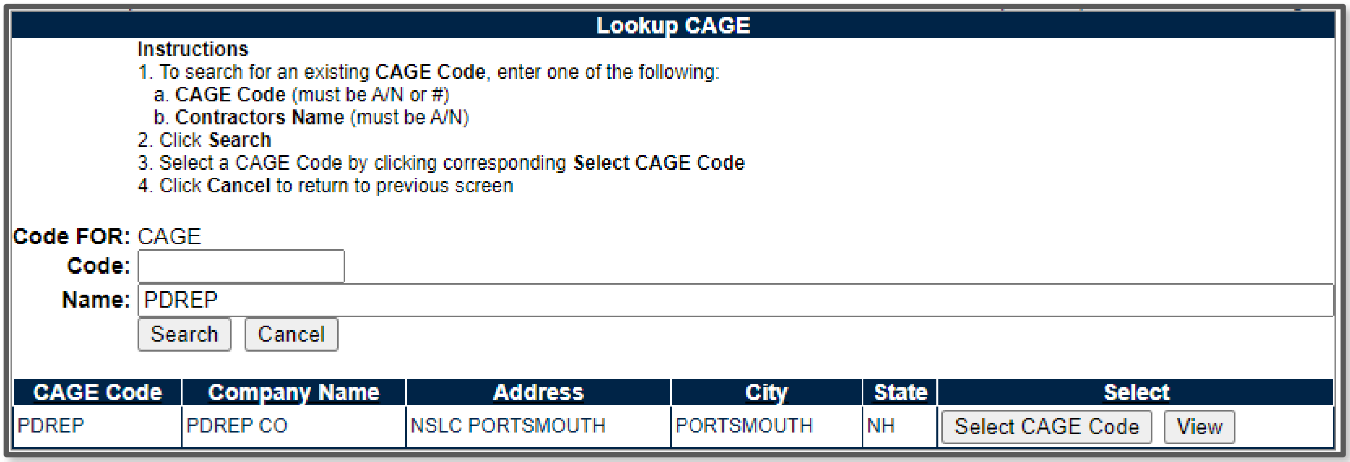
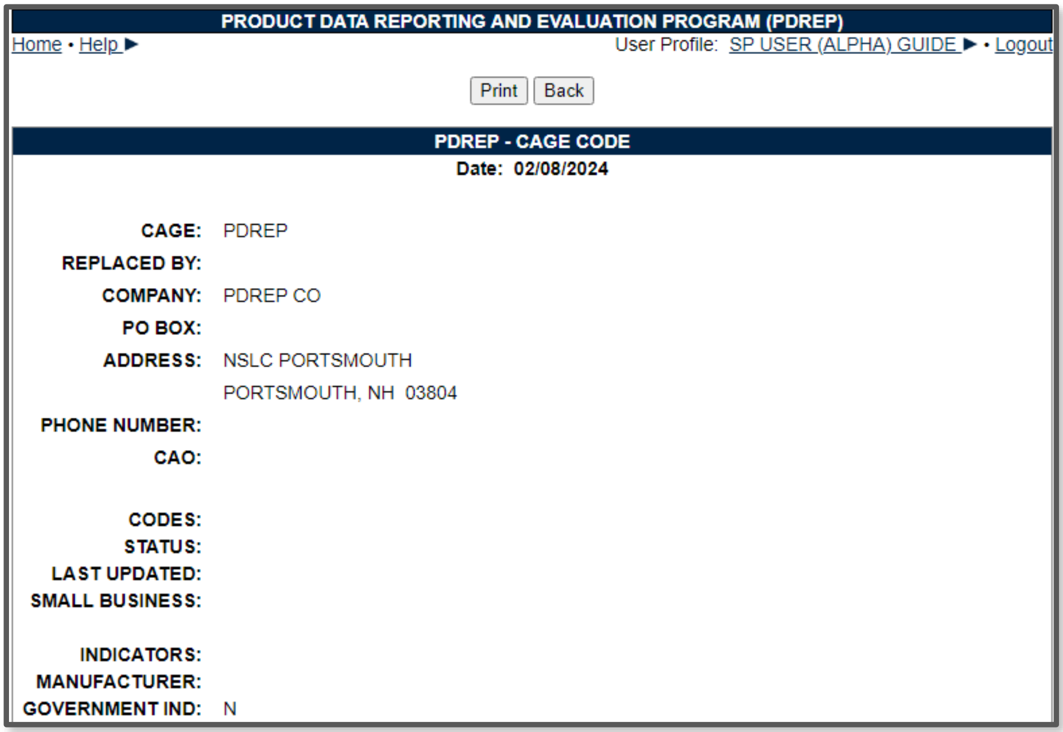


Figure 2.7

The returned display will show instances where the database was able to match the content submitted for query. Matching values will display at the bottom of the page along with two functional buttons as shown in **Figure 2.7**.

Associated Button Functionality for **Figure 2.7**

- **Select CAGE Code:** This button pulls the selected CAGE into the data field for which the Lookup button was selected.
- **View**: This button opens a non-editable display of the selected Company’s Additional Detail Page along with two functional buttons (**Figure 2.8**).
    - **Print:** Returns a print preview display of the CAGE Code selected. Select the “Print” button on the preview to generate a paper copy of the CAGE Codes Additional Detail Page.
    - **Back:** Returns the display to the previous page (returned results of Lookup CAGE Page).



PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)

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

Print Back

PDREP - CAGE CODE

Date: 02/08/2024

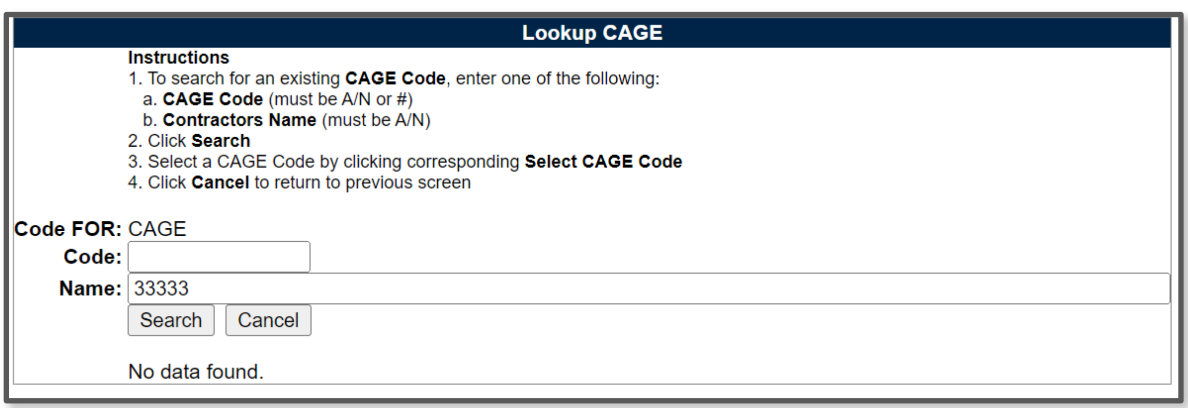
CAGE: PDREP
REPLACED BY:
COMPANY: PDREP CO
PO BOX:
ADDRESS: NSLC PORTSMOUTH
PORTSMOUTH, NH 03804
PHONE NUMBER:
CAO:

CODES:
STATUS:
LAST UPDATED:
SMALL BUSINESS:

INDICATORS:
MANUFACTURER:
GOVERNMENT IND: N

Figure 2.8

When the database cannot find an exact match, the returned display will notify the user “No data found”. An example of this can be seen in **Figure 2.9**.



Lookup CAGE

Instructions
1. To search for an existing **CAGE Code**, enter one of the following:
a. **CAGE Code** (must be A/N or #)
b. **Contractors Name** (must be A/N)
2. Click **Search**
3. Select a CAGE Code by clicking corresponding **Select CAGE Code**
4. Click **Cancel** to return to previous screen

Code FOR: CAGE
Code:
Name: 33333
Search Cancel

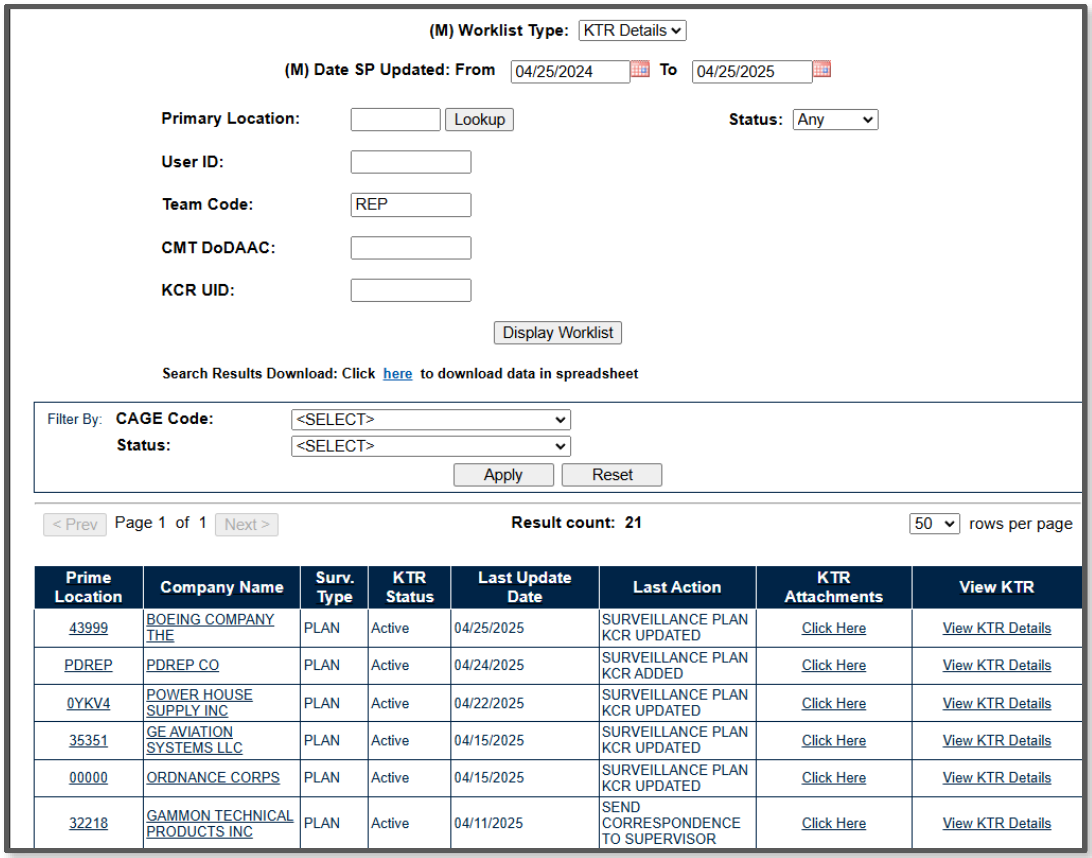
No data found.

Figure 2.9

- **Display Worklist:** Loads a result set based on the criteria as entered on the screen.
- **Apply:** Enacting the worklist to generate a new return based off the chosen parameters selected within the filter(s).
- **Reset:** Clears selected filters and returns them to their “<Select>” default.
- **(Page) Next:** This buttons functionality is available only when the Worklist rows returned exceed that of the “Rows per Page” selected. This button is used to initiate the next series of rows of the returned Worklist.
- **(Page) Prev:** This buttons functionality is available only when the Worklist rows returned exceed that of the “Rows per Page” selected. This button is used to retrieve the previous resource of rows pertaining to the returned Worklist.

- **Result Count:** Displays the total number of rows returned within the Worklist presented.
- **Rows per Page:** Defaulting to 50 rows, this functionality allows a user to control how many Worklist rows are displayed on a page.
- **Ascend / Descend:** This functionality is present within Worklist data field headers and may be used to display returned Worklist rows in a desired order (largest to smallest or smallest to largest). To sort by ascending/descending, click the desired column header. This will automatically sort for the user. When used, an ascension/descension arrow is applied to the header notating how the table is organized.

2.3 KTR Details Worklist Results



(M) Worklist Type: KTR Details

(M) Date SP Updated: From 04/25/2024 To 04/25/2025

Primary Location: Lookup Status: Any

User ID:

Team Code: REP

CMT DoDAAC:

KCR UID:

Display Worklist

Search Results Download: Click here to download data in spreadsheet

Filter By: CAGE Code: <SELECT>

Status: <SELECT>

Apply Reset

< Prev Page 1 of 1 Next > Result count: 21 50 rows per page

Prime Location	Company Name	Surv. Type	KTR Status	Last Update Date	Last Action	KTR Attachments	View KTR
43999	BOEING COMPANY THE	PLAN	Active	04/25/2025	SURVEILLANCE PLAN KCR UPDATED	Click Here	View KTR Details
PDREP	PDREP CO	PLAN	Active	04/24/2025	SURVEILLANCE PLAN KCR ADDED	Click Here	View KTR Details
0YKV4	POWER HOUSE SUPPLY INC	PLAN	Active	04/22/2025	SURVEILLANCE PLAN KCR UPDATED	Click Here	View KTR Details
35351	GE AVIATION SYSTEMS LLC	PLAN	Active	04/15/2025	SURVEILLANCE PLAN KCR UPDATED	Click Here	View KTR Details
00000	ORDNANCE CORPS	PLAN	Active	04/15/2025	SURVEILLANCE PLAN KCR UPDATED	Click Here	View KTR Details
32218	GAMMON TECHNICAL PRODUCTS INC	PLAN	Active	04/11/2025	SEND CORRESPONDENCE TO SUPERVISOR	Click Here	View KTR Details

Figure 2.10

KTR Details Worklist Results from **Figure 2.10**

- **Filtering:** CAGE Code and Status are the drop-down fields a Worklist can be filtered by. Filtering is enabled only after a Worklist is generated.
- **Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **Company Name:** The name of the company associated with the Primary Location for the Surveillance Plan. Automatically populates based on the CAGE Code data field. Hyperlink displays the name of the company associated with the Primary Location for the Surveillance Plan. When selected, a popup window will display with corresponding information pulled from the PDREP-AIS data base.

- **Surv. Type:** This column indicates the type of Surveillance Plan. Currently, only one option ("Plan") is available.
- **KTR Status:** Displays the status of the Plan.
    - *Active:* A Plan engaged in ongoing surveillance.
    - *Archived:* A Plan for where surveillance is not currently being performed.
- **Last Update Date:** The date the Plan (KTR Details Page) was last updated based on the "Save" action.
- **Last Action:** Description of the most recent change to the Plan. Actions listed are the same as those items saved to the History page.
- **KTR Attachments:** Attachments added at the Plan level. This hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Plan and KCR. Hyperlink displaying the number of attachments at the Plan/KCR level. When selected, this hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Plan and KCR.
- **View KTR:** Hyperlink that navigates to the view-only display of the KTR Details Page.

2.4 KCR Worklist Results

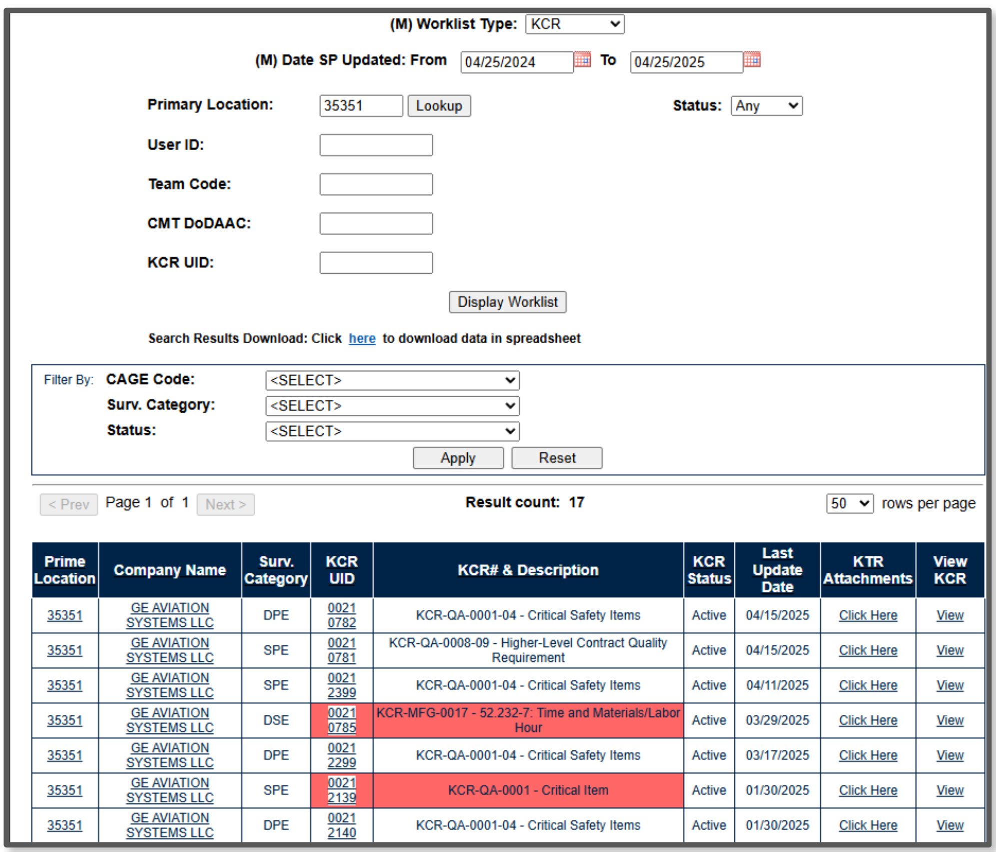


Figure 2.11

KCR Worklist Results from **Figure 2.11**

- **Filtering:** CAGE Code, Status and Surv. Category are the drop-down fields a Worklist can be filtered by. Filtering is enabled only after a Worklist is generated.
  - **Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **Company Name:** The name of the company associated with the Primary Location for the Surveillance Plan. Automatically populates based on the CAGE Code data field.
- **Surv. Category:** Type of surveillance evaluation (DPE, DSE, PE, SPE) identified within the KCR.
- **KCR UID:** Hyperlink displaying the 8-digit unique identifier of the KCR. When selected, the KCR will open to an editable view.
  - If any KCR values for KCR # & Description, Event, Activity or Sub-Activity have been identified as Inactive, the KCR UID link will bring the user to the KCR page where the information that needs to be updated will be highlighted in red, as seen in **Figure 2.12**.

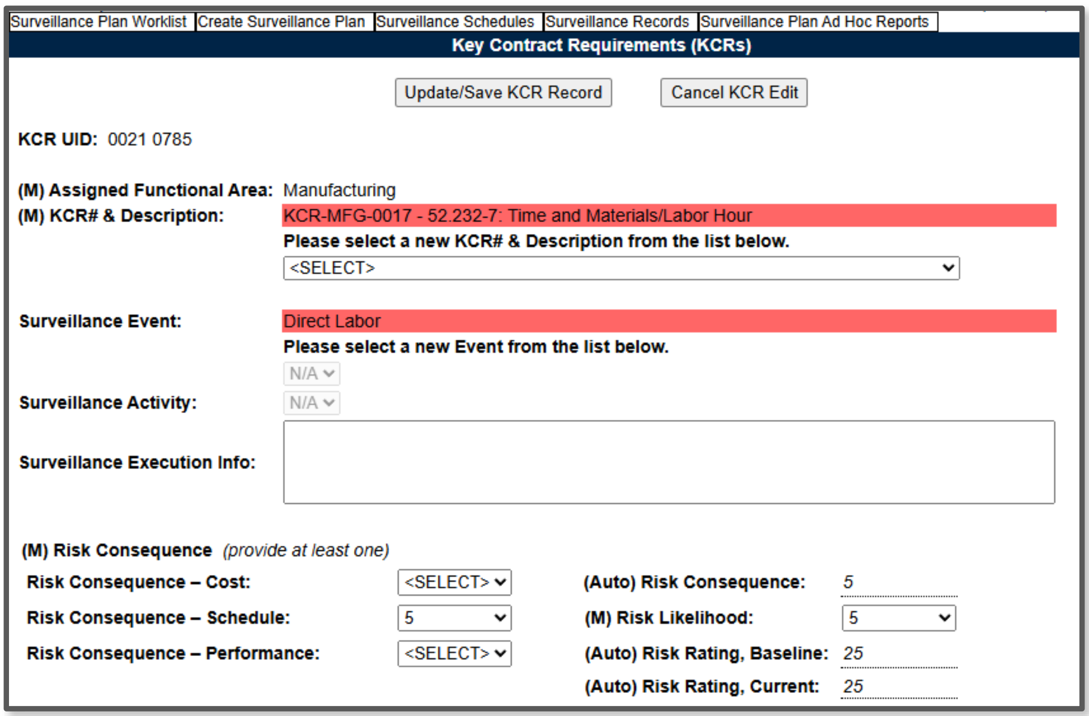
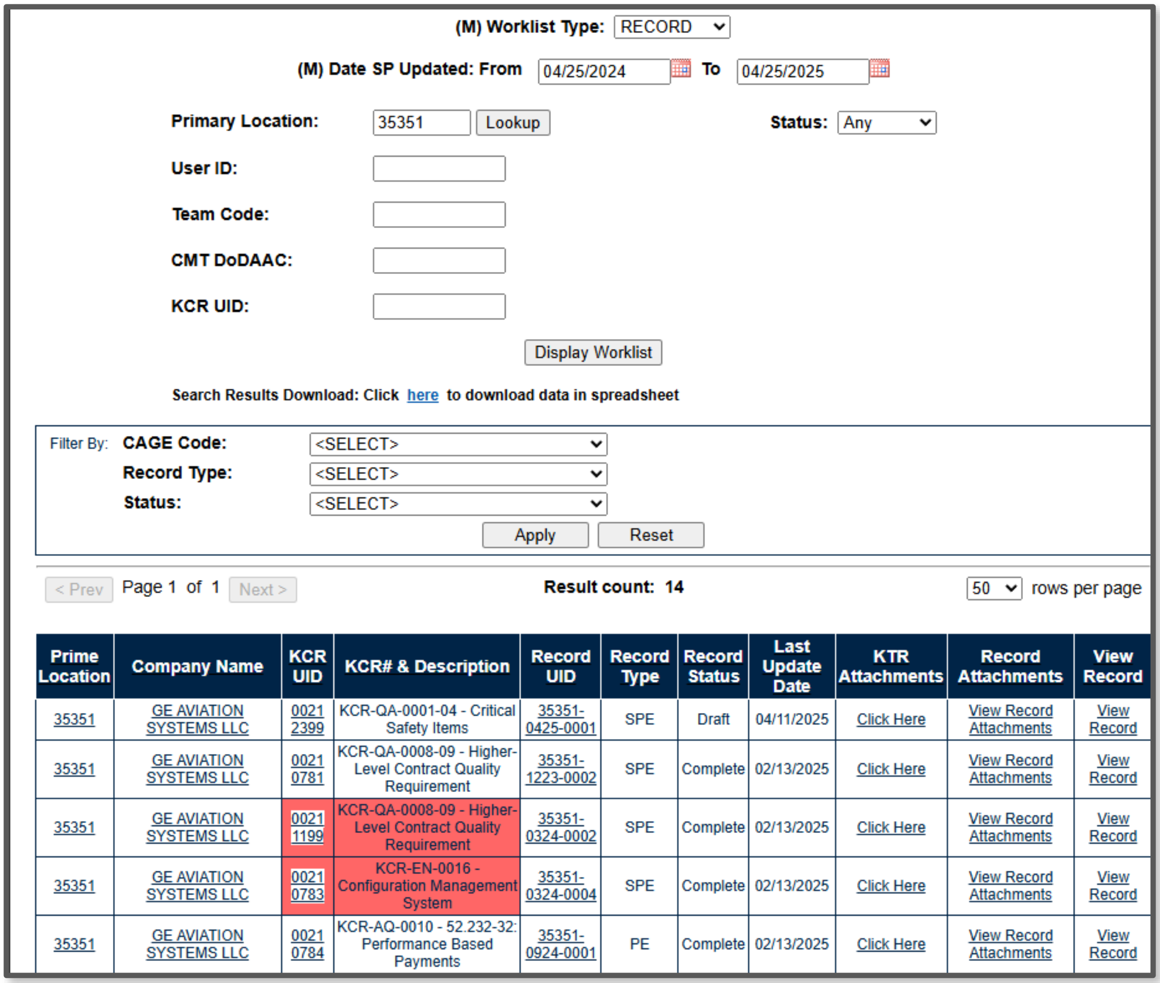


Figure 2.12

- **KCR# & Description:** Associated with the selected Functional Area. This field is also highlighted red when a KCR value is Inactive.
- **KCR Status:** The status of the KCR.
  - *Active:* KCR engaged in active oversight.
  - *Inactive:* KCR no longer engaged in active oversight.
- **Last Update Date:** The date the KCR was last updated, based on the "Save" action.

- **KTR Attachments:** Hyperlink displaying the number of attachments at the Plan/KCR level. When selected, this hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Plan and KCR.
- **View KCR:** Hyperlink that navigates to the view-only display of the KCR.

2.5 Records Worklist Results



(M) Worklist Type: RECORD

(M) Date SP Updated: From 04/25/2024 To 04/25/2025

Primary Location: 35351 Lookup Status: Any

User ID:

Team Code:

CMT DoDAAC:

KCR UID:

Display Worklist

Search Results Download: Click here to download data in spreadsheet

Filter By: CAGE Code: <SELECT>

Record Type: <SELECT>

Status: <SELECT>

Apply Reset

< Prev Page 1 of 1 Next > Result count: 14 50 rows per page

Prime Location	Company Name	KCR UID	KCR# & Description	Record UID	Record Type	Record Status	Last Update Date	KTR Attachments	Record Attachments	View Record
35351	GE AVIATION SYSTEMS LLC	0021 2399	KCR-QA-0001-04 - Critical Safety Items	35351-0425-0001	SPE	Draft	04/11/2025	Click Here	View Record Attachments	View Record
35351	GE AVIATION SYSTEMS LLC	0021 0781	KCR-QA-0008-09 - Higher-Level Contract Quality Requirement	35351-1223-0002	SPE	Complete	02/13/2025	Click Here	View Record Attachments	View Record
35351	GE AVIATION SYSTEMS LLC	0021 1199	KCR-QA-0008-09 - Higher-Level Contract Quality Requirement	35351-0324-0002	SPE	Complete	02/13/2025	Click Here	View Record Attachments	View Record
35351	GE AVIATION SYSTEMS LLC	0021 0783	KCR-EN-0016 - Configuration Management System	35351-0324-0004	SPE	Complete	02/13/2025	Click Here	View Record Attachments	View Record
35351	GE AVIATION SYSTEMS LLC	0021 0784	KCR-AQ-0010 - 52.232-32: Performance Based Payments	35351-0924-0001	PE	Complete	02/13/2025	Click Here	View Record Attachments	View Record

Figure 2.13

Record Worklist Results from **Figure 2.13**

- **Filtering:** CAGE Code, Record Type and Status are the drop-down fields a Worklist can be filtered by. Filtering is enabled only after a Worklist is generated.
- **Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **Company Name:** The name of the company associated with the Primary Location for the Surveillance Plan. Automatically populates based on the CAGE Code data field.
- **KCR UID:** Hyperlink displaying the 8-digit unique identifier of the KCR. When selected, the KCR will open to an editable view.
    - If any KCR values for KCR # & Description, Event, Activity or Sub-Activity have been identified as Inactive, the KCR UID link will bring the user to the KCR page where the information that needs to be updated will be highlighted in red
- **KCR# & Description:** Associated with the selected Functional Area.

- **Record UID:** Hyperlink displaying the 13-digit unique identifier of the Record. When selected, this hyperlink displays the appropriate view for the record's status and user selecting the hyperlink. Editable views are restricted to Record Owners accessing a draft record. All others will encounter a View Only display.
    - If any KCR values for KCR # & Description, Event, Activity or Sub-Activity have been identified as Inactive, the Record UID link will bring the user to a view only Record page where the message in **Figure 2.14** will display instructing the user to update the KCR. Records may not be created or updated if the Record has associated Inactive KCR information.

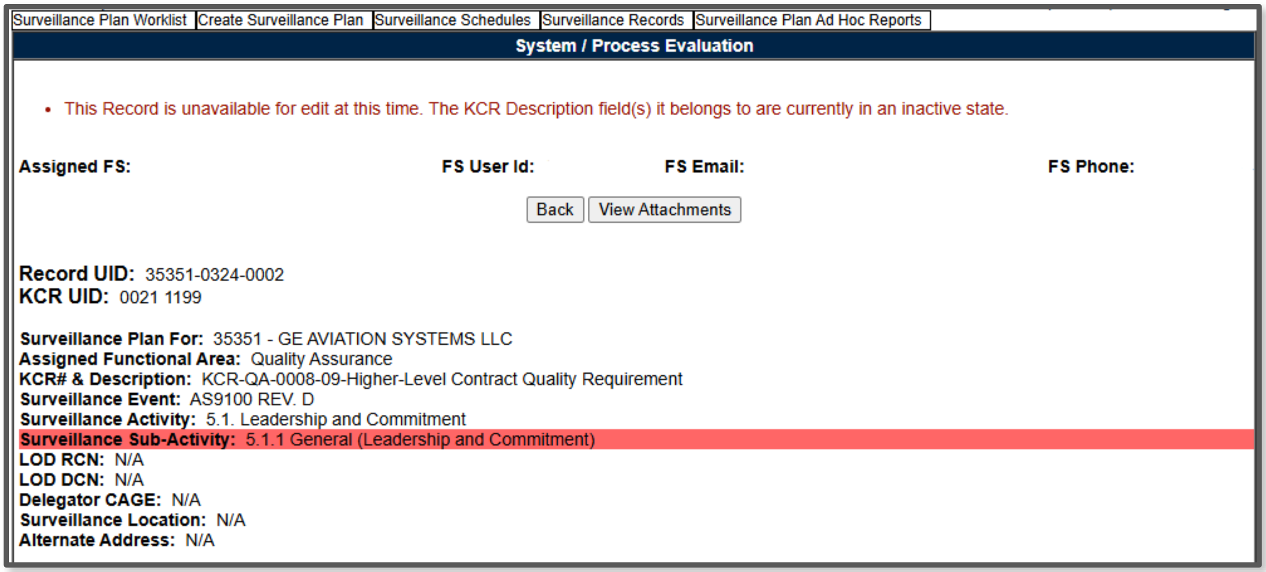


Figure 2.14

- **Record Type:** Record type (DPE, DSE, PE, SPE) as determined by the KCR's Surveillance Category.
- **Record Status:** Displays the status of the associated Record UID.
- **Last Update Date:** The date the associated Record was last updated, based on the "Save" action.
- **KTR Attachments:** Hyperlink displaying the number of attachments at the Plan/KCR level. When selected, this hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Plan and KCR.
- **Record Attachments:** Attachments added at the Record level. This hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Record.
- **View Record:** Hyperlink that navigates to the view-only display of the Record.

3 CREATING/EDITING KTR DETAILS

3.1 Initiating a New Surveillance Plan

On the PDREP Home Page, select “Create New Surveillance Plan” from the “Surveillance Plan (SP)” fly out (**Figure 3.1**). If already working in the application, select the “Create Surveillance Plan” tab at the top of the page (**Figure 3.2**).

Figure 3.1

After accessing the “Create New Surveillance Plan” page, complete all mandatory fields and select the “Create SP” button. If a Surveillance Plan has previously been created for the selected CAGE Code, the program will load the existing Plan rather than creating a new SP.

The information captured when creating a Surveillance Plan such as CAGE Code and User ID cannot be altered or removed by any user no matter their status. If a Plan is created in error, the Surveillance Plan may be archived which sets the SP to an “Archived” (inactive) status. Once the SP has been archived, it may be reopened in the future if needed which then sets the Plan back to an “Active” status.

Note: *For those rare instances where existing data needs to be modified, reach out to your DCMA PDREP POC and route the request to DCMA HQ through your chain of command as appropriate.*

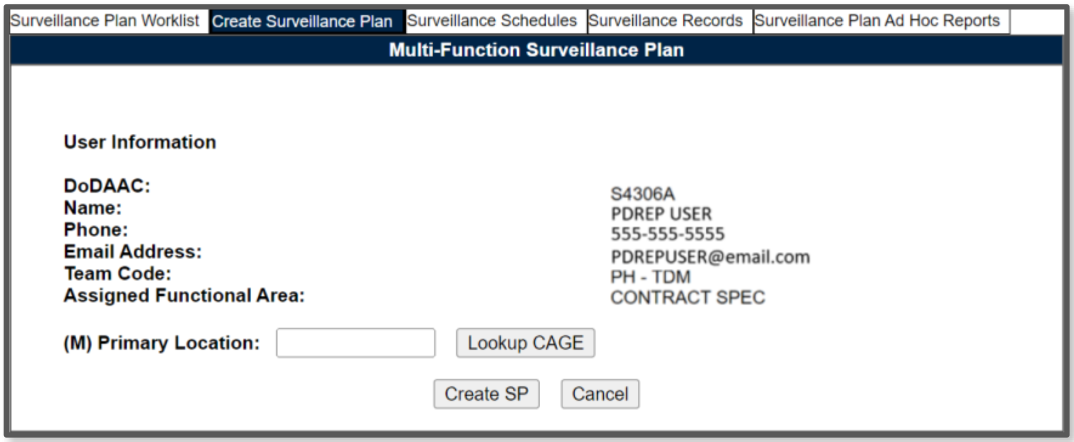


Figure 3.2

Associated Data Field for **Figure 3.2**

- **(M) Primary Location:** Select the type of location from the provided drop-down before entering the corresponding CAGE Code for the Surveillance Plan.

Associated Button Functionality for **Figure 3.2**

- **Cancel:** Navigates the user to the Worklist without creating a Plan.
- **Create SP:** Processes the request for a new Surveillance Plan. Successful entries will navigate to the “Multi-Function Surveillance Plan” page.
- **Lookup CAGE:** 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 Company Name. When a CAGE is selected from the lookup page, it populates the field associated with the button.

3.2 Surveillance Plan Data Entry

There are many sections within every Surveillance Plan. Some areas will automatically populate based on related information such as CAGE, while others require user entry and a “Save” action to be performed. For example, fields such as Contract Data or End Items require the use of the “Save” button to capture and register those entries to the database. The “Save” button must be utilized following additions to the Surveillance Plan in such areas as:

1. KTR POC List (**Section 3.2.2**)
2. Contractor Data (**Section 3.2.3**)
3. Applicable Programs (**Section 3.2.4**)
4. Applicable Contracts (**Section 3.2.5**)
5. End Item NSN/Part/Serial Number (**Section 3.2.6**)

Note: *When working within the KTR Details Page (displayed as the "Multi-Function Surveillance Plan"), saving is required to capture the additions made to the various sections. The "Save" button (located at the top and middle of the page) must be used to preserve entries. PDREP does not have an auto-save feature. This means the tool needs to be told to keep the information. This is done through the save action. If the "Save" button is not used, work will NOT be saved!*

3.2.1 Header

After initiating the creation of a Surveillance Plan, the tool will open to the top of the Plans main page (also known as the "KTR Details Page") with the identifying banner displaying as the "Multi-Functional Surveillance Plan". The first section known as the header, contains basic data regarding the status of the Surveillance Plan that is auto filled. An example of this is in **Figure 3.3**.

Within the header are three available buttons "Save", "Add/View Attachments" and "Landing Page". These buttons are not associated with any one section but instead relates to the page as a whole.

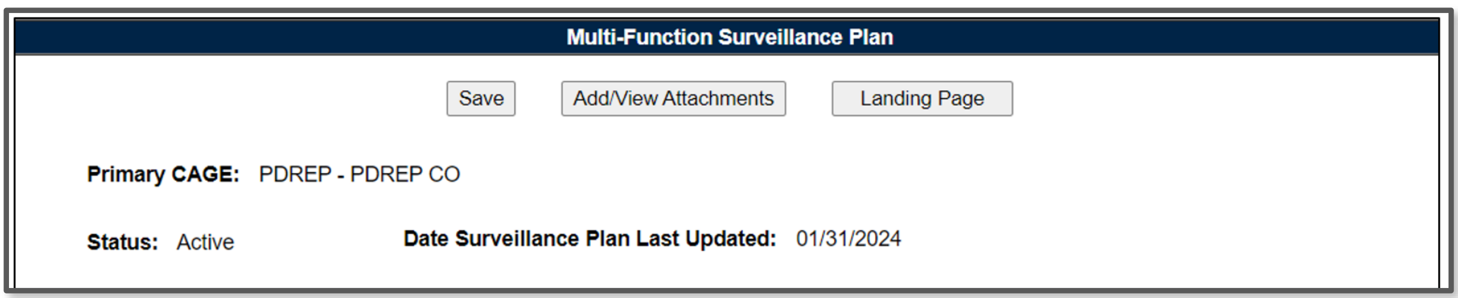


Figure 3.3

Associated Data Fields for **Figure 3.3**

- **Date Surveillance Plan Last Updated:** The date the Surveillance Plan was last updated based on the "Save" action.
- **Primary CAGE:** Auto-populates based on the CAGE Code entered in the Primary Location field when initiating a new Surveillance Plan. There is only one Surveillance Plan per CAGE Code regardless of status.
- **Status:** The status of the Surveillance Plan.
    - **Active:** A Plan engaged in ongoing surveillance.
    - **Archived:** A Plan where surveillance is not currently being performed.

Associated Button Functionality for **Figure 3.3**

- ***Add/View Attachments:** The “Add/View Attachments” button allows uploading, viewing and deleting of attachments. Navigation to the attachments page starts by clicking the “Add/View Attachments” button. After the page refresh, the ability to add, view or remove related documents will be available for users with Functional Specialist (or higher) access.

***Note**: Each Plan, Record and subsequently the associated IDR’s have their own designated space for attachments. This means applied documents are exclusive to the location (level) they are applied and will not populate elsewhere. For further instructions, please see the user guide on <u>Attaching a File in PDREP</u>, found on the PDREP website under “References” and housed within “Guides and Manuals”.*

- **Landing Page:** Navigates the user to the Surveillance Plan Landing Page associated with the CAGE Code.
- **Save:** This button may be used at any time to save the contents of the Surveillance Plan.

***Note:** When working within the KTR Details Page (displayed as the “Multi-Function Surveillance Plan”), saving is required to capture the additions made to the various sections. The “Save” button (located at the top and middle of the page) <u>must</u> be used to preserve entries. PDREP does not have an auto-save feature. This means the tool needs to be told to keep the information. This is done through the save action. <u>If the “Save” button is not used, work will NOT be saved!</u>*

3.2.2 KTR POC

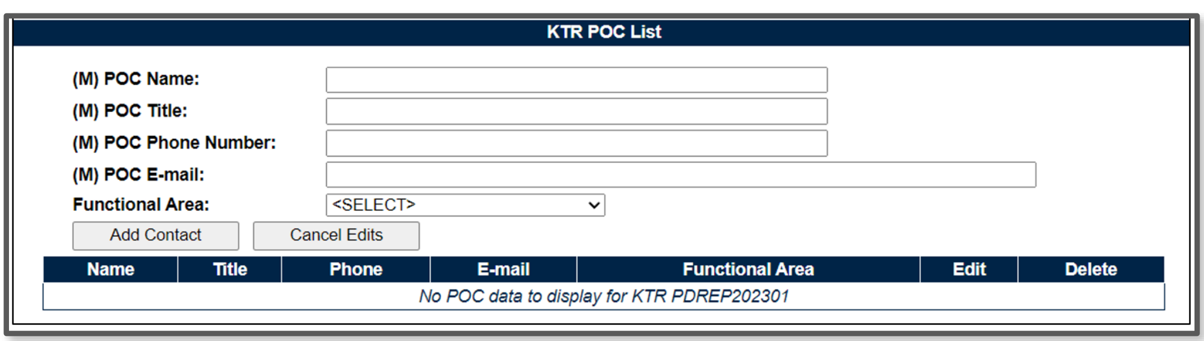


Figure 3.4

Associated Data Fields for **Figure 3.4**

- **(M) POC Name:** Field to enter the primary contractor Point of Contact (POC) associated with the surveillance location.
- **(M) POC Title:** Field to enter the job title of the primary contractor POC associated with the surveillance location.

- **(M) POC Phone:** Field to enter the phone number of the primary contractor POC associated with the surveillance location. Special Characters disallowed.
- **(M) POC E-mail:** Field to enter the email address of the primary contractor POC associated with the surveillance location.
- **Functional Area:** If applicable, select the Functional Area related to the POC from the drop-down provided.

Associated Button Functionality for **Figure 3.4**

- **Add Contacts:** This button adds all values from the KTR POC intake fields and applies them to the KTR POC Table as a one row entry.
- **Cancel Edits:** When used, this button clears the KTR POC intake fields or cancels any modification to the KTR POC entry being edited.

Multiple KTR POCs may be added to the KTR Details Page. Enter all (M) Mandatory fields then click the Add Contact button. If you click Add Contact without all mandatory fields entered, an error message will populate (**Figure 3.5**)

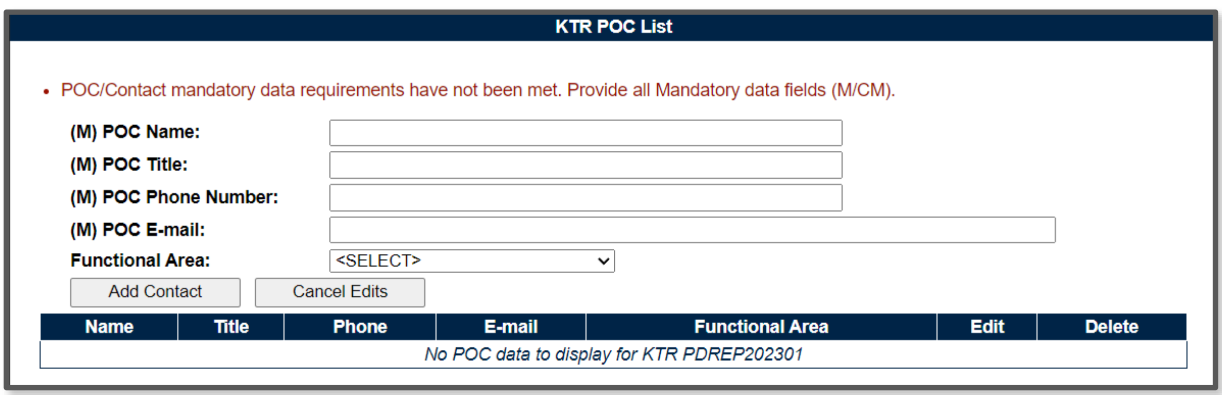
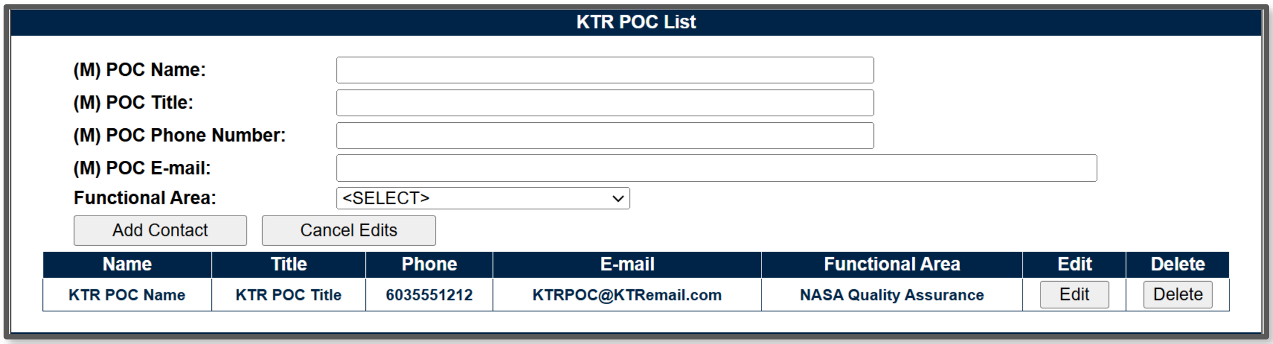


Figure 3.5

After entering values and clicking “Add Contact”, the KTR POC information will display in the “KTR POC Table” below the entry fields (**Figure 3.6**).

Note: *When working within the KTR Details Page (displayed as the “Multi-Function Surveillance Plan”), saving is required to capture the additions made to the various sections. The “Save” button (located at the top and middle of the page)* *<u>must</u>* *be used to preserve entries. PDREP does not have an auto-save feature. This means the tool needs to be told to keep the information. This is done through the save action.* *<u>If the “Save” button is not used, work will NOT be saved!</u>*



KTR POC List

(M) POC Name:
(M) POC Title:
(M) POC Phone Number:
(M) POC E-mail:
Functional Area: <SELECT>

Add Contact | Cancel Edits

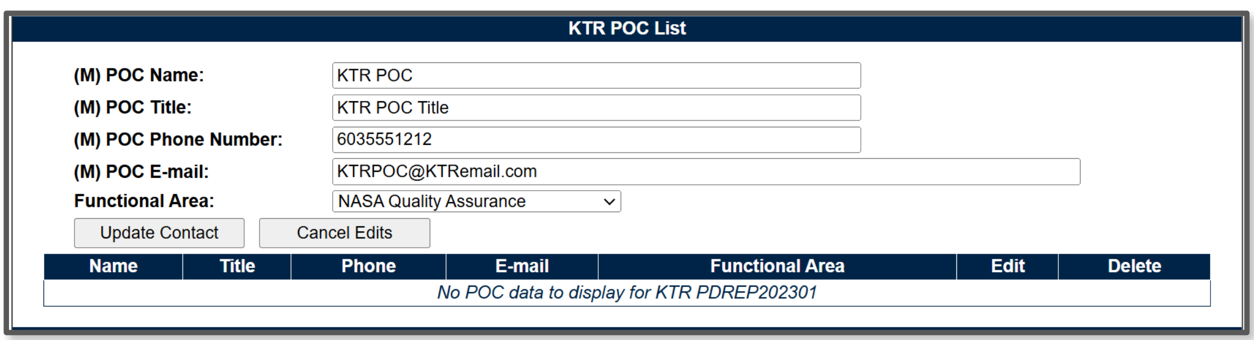
Name	Title	Phone	E-mail	Functional Area	Edit	Delete
KTR POC Name	KTR POC Title	6035551212	KTRPOC@KTRemail.com	NASA Quality Assurance	Edit	Delete

Figure 3.6

Associated Button Functionality for **Figure 3.6**

- **Edit:** This button repopulates selected KTR POC into the above data fields (see **Figure 3.6**), allowing modifications to be made. Button is accessible after KTR POC has been added to the table.
- **Delete:** This button removes the associated KTR POC entry from the table. Button is accessible after KTR POC has been added to the table.
- **Add Contact:** Button is accessible when an applied KTR POC is being edited. When used, it applies the KTR POC back to the table.
- **Cancel Edits:** Button is accessible when an applied KTR POC is being edited. When used, it restores the KTR POC back to the table unchanged.

The Delete button will remove the KTR POC entry from the table. The Edit button will re-populate the entry in the POC data fields to allow updating and editing the entry. After making changes, click the “Update Contact” button to reapply the entry in the KTR POC Table (**Figure 3.7**). Click “Cancel Edits” to cancel or not save updates to the KTR POC.



KTR POC List

(M) POC Name: KTR POC
(M) POC Title: KTR POC Title
(M) POC Phone Number: 6035551212
(M) POC E-mail: KTRPOC@KTRemail.com
Functional Area: NASA Quality Assurance

Update Contact | Cancel Edits

Name	Title	Phone	E-mail	Functional Area	Edit	Delete
No POC data to display for KTR PDREP202301						

Figure 3.7

Note: *Additions and changes will not be saved until the SAVE button is clicked at the top of the KTR Details page.*

3.2.3 Contractor Data

The “Contractor Data” section of the Surveillance Plan allows the user to identify what business model the Prime Contractor (*Primary Location*) resembles. It also allows users to identify the Prime Contractor’s suppliers by CAGE Code and business model. This is where points of contact for each of those suppliers can be entered. These POC’s are the users DCMA POC’s at the sub-location. This information can be found in the CMT eTool.

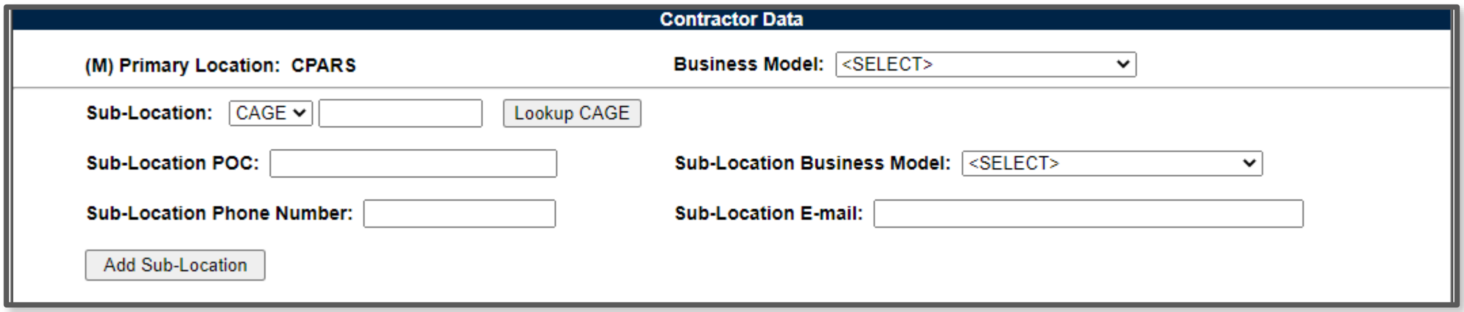


Figure 3.8

Associated Data Fields for **Figure 3.8**

- **Business Model:** Drop-down list with options to record the business model of the *Primary Location* undergoing surveillance (**Figure 3.9**).
- **(M) Primary Location:** Auto-populates based on the CAGE Code entered in the Primary Location field when initiating a new Surveillance Plan. There is only one Surveillance Plan per CAGE Code regardless of status.

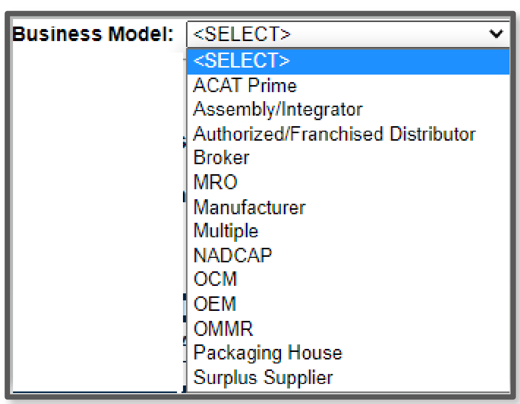


Figure 3.9

- **Sub-Location:** A secondary CAGE Code (Prime Contractors supply stream) where surveillance is being performed.
- **Sub-Location Business Model:** Same drop-down list as the Primary Location business model (**Figure 3.9**) but attributed to the Sub-Location.
- **Sub-Location E-mail:** Email address of the DCMA POC.

- **Sub-Location Phone Number:** Phone number of the DCMA POC.
- **Sub-Location POC:** The name of the DCMA Point of Contact (POC) associated with the Sub-Location.

The Sub-Location CAGE Code and at least one additional piece of information is needed to add the entry to the Contractor Data Sub-Location Table, otherwise an error message will appear. Once all applicable data fields have been entered, select the “Add Sub-Location” button to apply the Contractors’ Data to the Sub-Location Table. The Sub-Location Table is created when the first Sub-Location is applied. This is done through the use of the “Add Sub-Location” button. An example of this can be seen in **Figure 3.10**.

Note: *Current functionality does not allow Contractor POC's to be edited.*

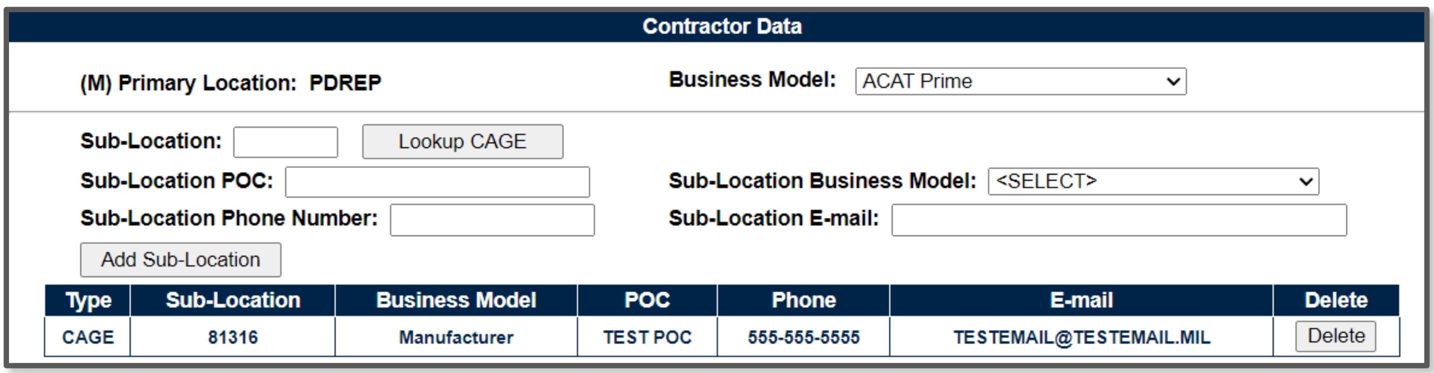


Figure 3.10

Associated Button Functionality for **Figure 3.10**

- **Add Sub-Location:** Adds selected information regarding the Sub-Location to the table. More than one can be added.
- **Delete:** Removes the selected Sub-Location from the table.
- **Lookup CAGE:** Selecting the “Lookup” button navigates the user to the “Lookup CAGE” page. When a CAGE is selected from the lookup page, it populates the field(s) associated with the button. When a company is selected, the user is returned to the Contractor Details section with the Sub-Location displaying the CAGE Code of selected company. Please see **Section 2.4** of this document for additional details on CAGE Code Lookup.

3.2.4 Applicable Programs

The “Applicable Programs” section of the Surveillance Plan allows for capturing the associated acquisition programs and/or platforms for which the contractor is providing material. A default view of the Applicable Program area is shown in **Figure 3.11**

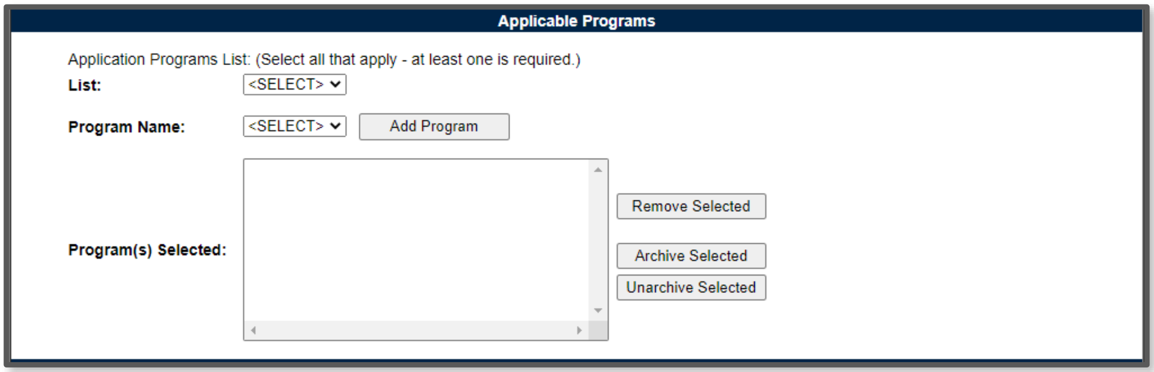


Figure 3.11

Select an option in the first drop-down (List) to identify the List type (DAI, NSEO, or PMBI). The page will query for the associated Programs within the selected List type. Subsequently the Programs associated with the initial selection will be loaded into the “Program Name” drop-down box below. An example of this can be seen in **Figure 3.12**.

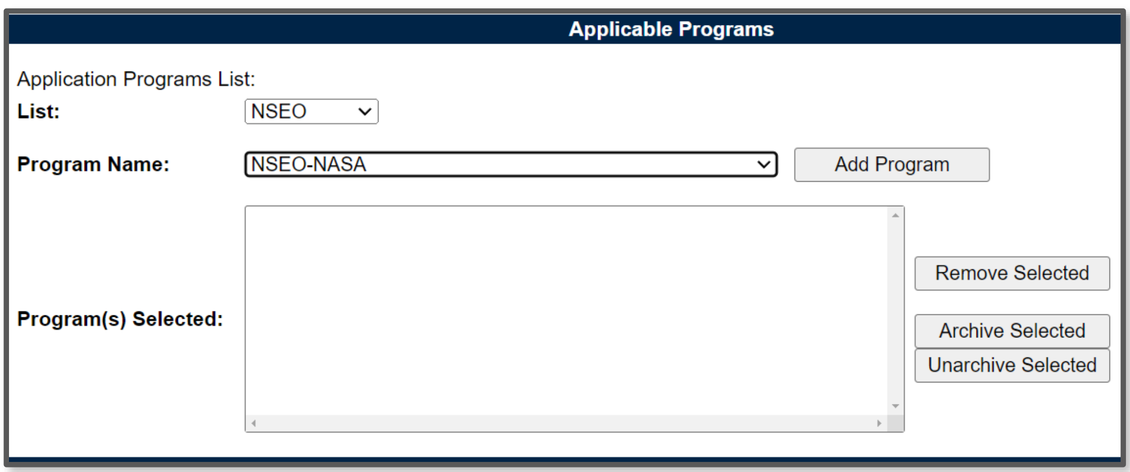


Figure 3.12

After selecting the “Program Name”, use the “Add Program” button to add the entry to the “Program(s) Selected” list box below. An example of this may be seen in **Figure 3.13**.

Applied Programs within the list box may be removed only when it is free of (not applied to) a KCR or Record. To remove an applied Program within the list box, select the desired Program(s) to be removed and then click the “Remove Selected” button. The same process is used to “Archive” and “Unarchive” a listed Program. However, a Program must be saved to a Plan first before it can be successfully archived. Otherwise, it will simply be removed from the Applicable Programs box.

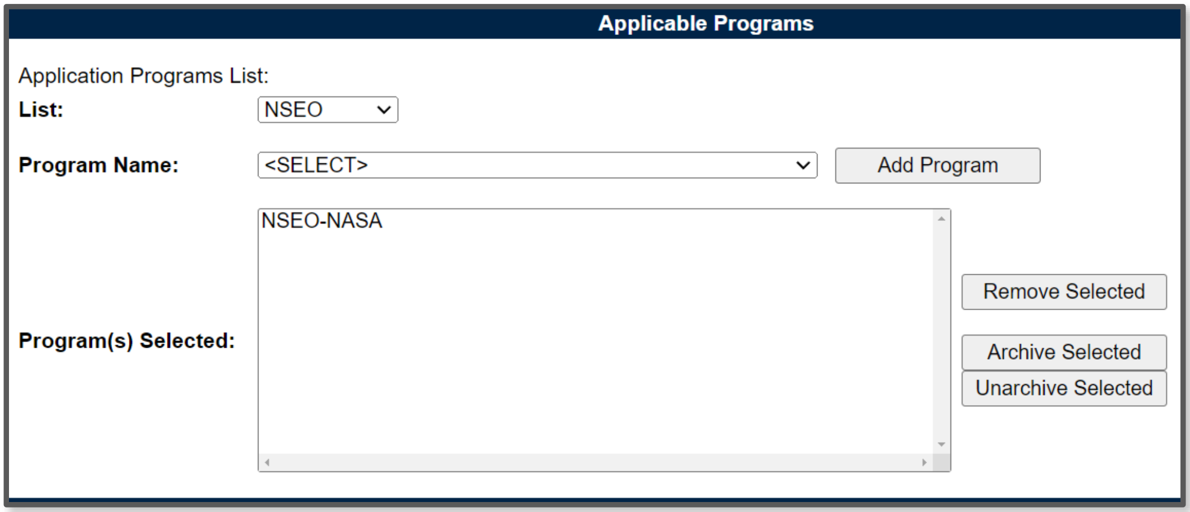


Figure 3.13

Associated Data Fields for **Figure 3.13**

- **List:** Select one of the three “List” types from the provided drop-down.
    i. *DAI* – Defense Agencies Initiative list.
    ii. *NSEO* – Navy Special Emphasis Operations list.
    iii. *PMBI* – Portfolio Management & Business Integration list (i.e. PST Collaboration Site).
- **Program Name:** The Program Name populates off the selected “List” type. After selecting the Program Name from the provided drop-down, click the “Add Program” button to capture the selection in the “Program(s) Selected” list box. Repeat this process as necessary to capture additional Program Names.
- **Program(s) Selected:** This box contains a list of the recorded Program Names applied to the Plan. Contents within this box can be removed, archived, or unarchived by selecting the desired Program Name(s) and clicking on the corresponding action button.

Associated Button Functionality for **Figure 3.13**

- **Add Program:** This button inserts the selected Program into the list box.
- **Archive Selected:** This button sets the selected Program Name(s) as “Archived” whereby it will send it to the bottom of the list and gray it out as shown in **Figure 3.15**. Programs may be Archived any time after its initial save to the KTR details page.
- **Remove Selections:** This button removes the selected Program Name (or multiple Program Names when selected with the use of the “Ctrl” keyboard button) highlighted within the list box. A program cannot be removed if it is associated with a KCR or Record; a user will receive the message shown in **Figure 3.14** when attempted.
- **Unarchive Selected**: This button undoes the Archiving action described above.

Figure 3.14

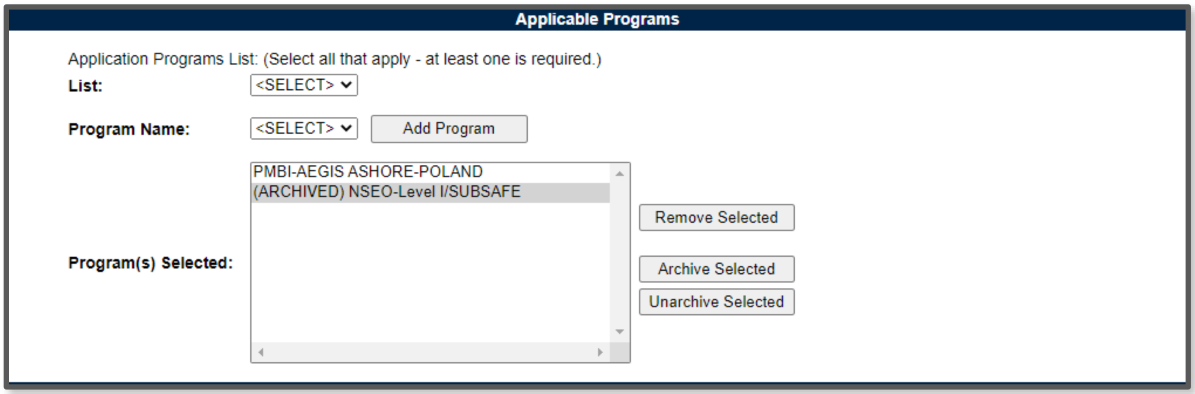


Figure 3.15

3.2.5 Applicable Contracts

The “Applicable Contracts” section of the Surveillance Plan allows for capturing a listing of contracts relevant to the surveillance/oversight of the contractor. A default view of the Applicable Contracts area is shown in **Figure 3.16**.

Figure 3.16

Enter a contract number, associated dollar amount and select the “Add Contract” button to add the entry to the Contract(s) Selected list box below. An example of this can be seen in **Figure 3.17**.

Applied Contracts within the list box may be removed only when it is free of (not applied to) a KCR or Record. To remove an applied Contract within the list box, select the desired Contract(s) to be removed and then click the “Remove Selected” button. The same process is used to “Archive” and “Unarchive” a listed Contract. However, a Contract must be saved to a Plan first before it can be successfully archived. Otherwise, it will simply be removed from the Applicable Contract box.

Note: *An active contract must be present within the Plan to create a KCR.*

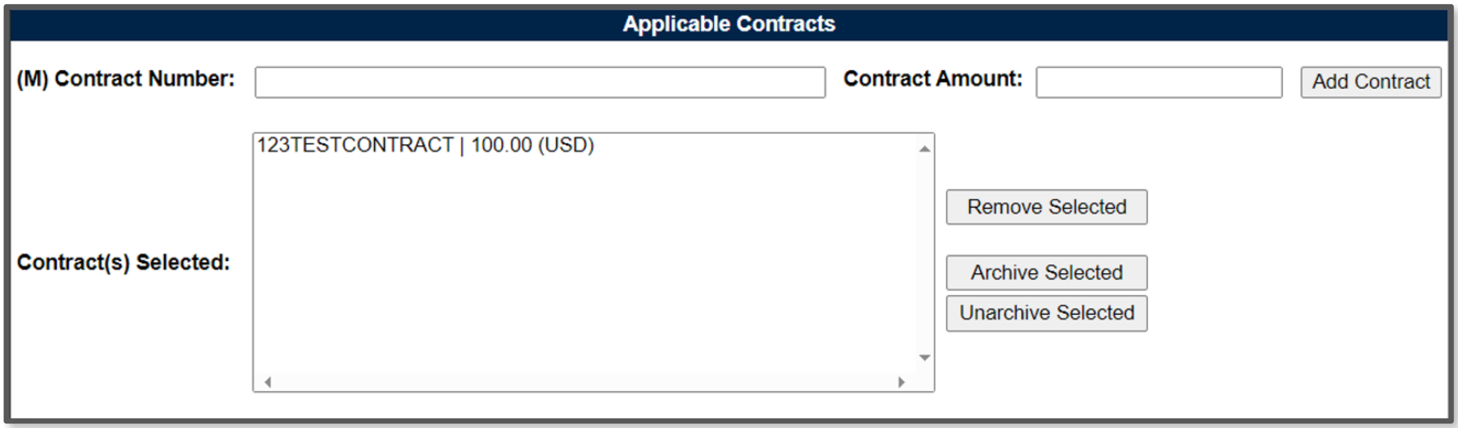


Figure 3.17

Associated Data Fields for **Figure 3.17**

- **Contract Amount:** The value of the above contract in USD. Maximum value of 999999999.99 (12 characters total).
- **(M) Contract Number:** The awarded number associated with a specific contractor DCMA has surveillance oversight of.
- **Contract(s) Selected:** This box contains a list of the recorded Contracts applied to the plan. Contents within this box, can be removed, archived, or unarchived by selecting the desired Contract(s) and clicking on the corresponding action button.

Associated Button Functionality for **Figure 3.17**

- **Add Contract:** This button inserts the Contract Number and Contract Amount into the Contract(s) Selected list box.
- **Archive Selected:** This button sets the selected item(s) as "Archived" whereby it will send it to the bottom of the list and gray it out as shown in **Figure 3.18**.
- **Remove Selected:** This button removes the selected Contract Number(s) and Contract Amount from the Contract(s) Selected list box. A contract cannot be removed if it is associated with a KCR or Record. User will receive the message in **Figure 3.19** when attempted.
- **Unarchive Selected**: This button undoes the Archiving action described above.

Figure 3.18

Figure 3.19

Note: *A user must first save a new applicable contract before archiving, otherwise the plan will not save the contract.*

3.2.6 End Item(s)

The End Item section of the Surveillance Plan allows for the creation of a list of relevant National Stock Numbers, Part Numbers, Serial Numbers, and their item descriptions for materials manufactured by the contractor undergoing surveillance as relevant to the oversight of the contract.

3.2.6.1 Adding End Item(s)

This section defaults to seven blank data entry fields as seen in **Figure 3.20**. Enter the known information and select “Add End Item” to apply the entry to the table. The End Item Table generates after the first End Item is applied. An example of this may be seen in **Figure 3.25**. Valid entries must consist of either a NSN & Additional Identifier (Part Number/Unique Identifier, Serial Number, Product/Service Description) or two identifiers.

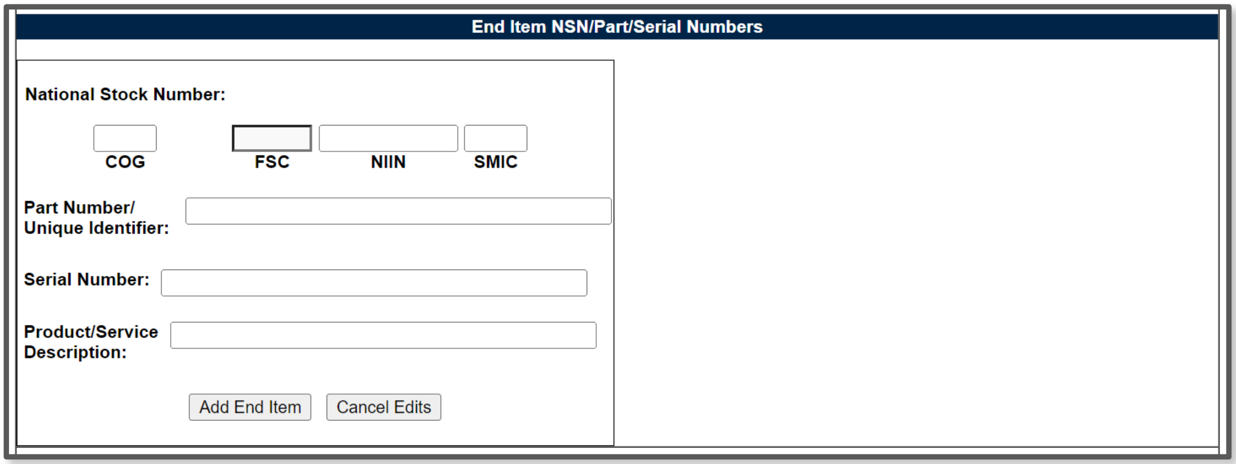


Figure 3.20

Associated Data Fields for **Figure 3.20**

- **National Stock Number:** Also known as the NSN, it is a thirteen-digit code associated with a specific material item within the DoD Supply System. The NSN consists of a Federal Supply Class (FSC) Code and a National Item Identification Number (NIIN). For items specific to the Navy, a prefixed Cognizant Code (COG) and a suffixed Special Material Identification Code (SMIC) are also associated with the NSN.
    - **COG:** Two-position alphanumeric Code associated with the Navy Item Manager for the associated NSN.
    - **FSC:** The Federal Supply Class Codes are four numeric digits identifying the general group of the material.

***Note:** For Service Contracts, the PSC (Product and Service Code) may also be utilized in this data field.*

-
    - **NIIN:** National Item Identification Number is a nine-digit Code that uniquely identifies an item. Entering the NIIN will automatically populate the COG, FSC, SMIC, and Product Description as relevant.
    - **SMIC:** The Special Material Identification Code (SMIC) is a two-position alphanumeric Code used by the Navy to categorize material under basis of source/quality control, technical control, or various procurement or handling controls.
- **Part Number:** If known, enter the Part Number of the material. If an End Item does not have a Part Number or NIIN, users can enter a Nomenclature in the Part Number text box *(max of 75 characters).*
- **Product/Service Description:** Describes the product or service properties. This field will automatically populate based on the NIIN entered but may be edited if necessary *(max of 200 characters).*
- **Serial Number:** If known, enter the Serial Number of the material *(max of 1,000 characters).*

Associated Button Functionality for **Figure 3.20**

- **Add End Item:** Inserts the End Item and associated information into the “Selected End Item(s)” list box.
- **Cancel Edits:** Clears values on new entries not yet applied to the End Item Table.

Note: *The “Save” button (located at the top and middle of the page) must be used to preserve entries. PDREP does not have an auto-save feature. This means the tool needs to be told to keep the information. This is done through the save action. If the “Save” button is not used, work will NOT be saved!*

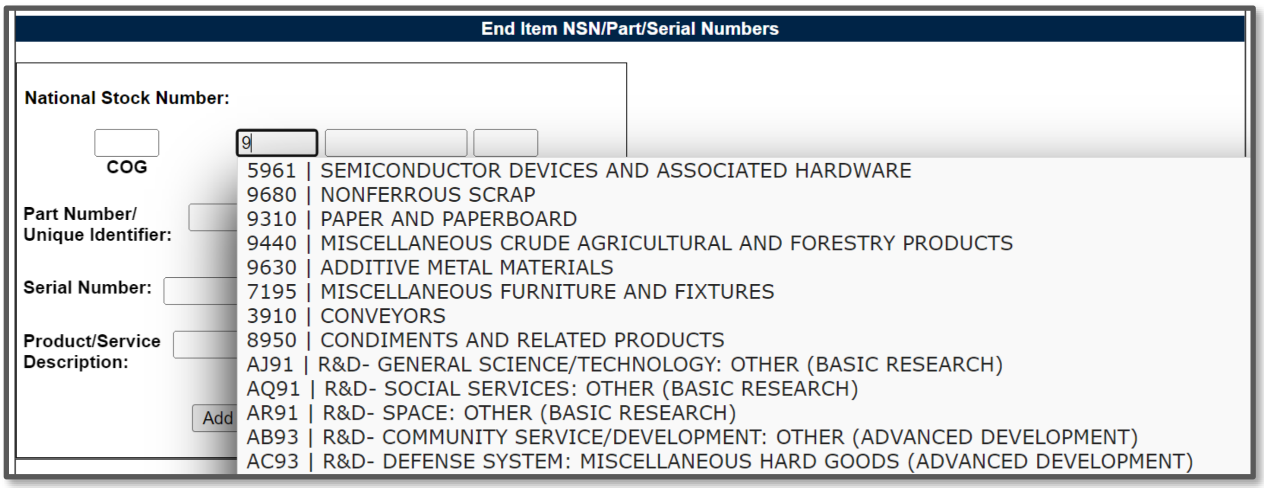


Figure 3.21

Text entered in the FSC data field, will begin to generate a list of related components and parts registered within the Federal Logistics Information System (FLIS) as shown in **Figure 3.21**.

When a National Item Identification Number (NIIN) is used, the database performs a query whereby the NIIN is checked against the FLIS dataset. An error message will display if the NIIN entered is not recognized within FLIS. **Figure 3.22** shows an example of this.

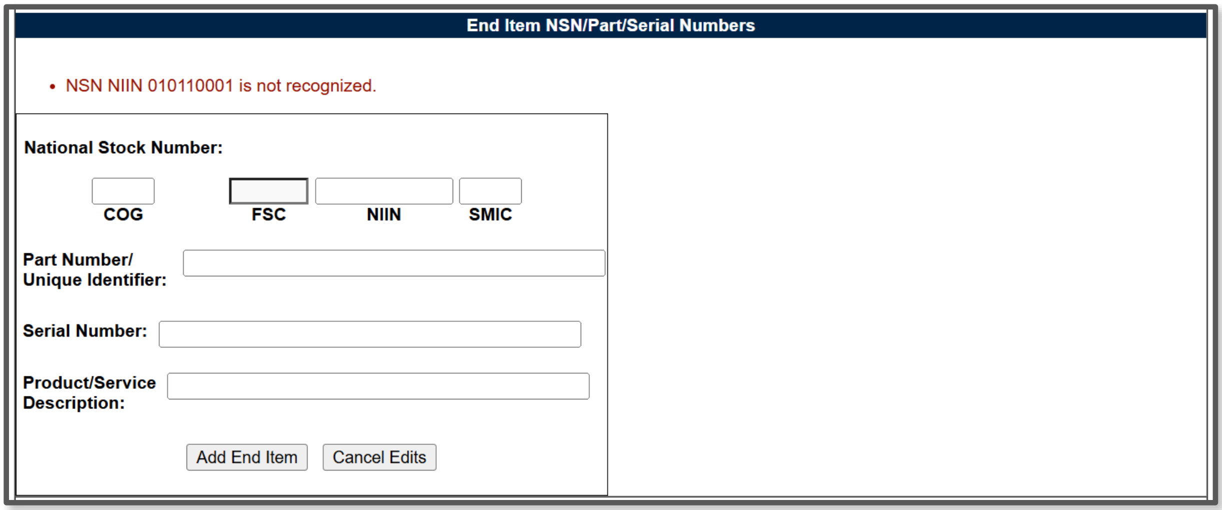


Figure 3.22

When a recognized NIIN is entered, the SP tool will automatically fill associated data fields of COG, FSC, SMIC and Product/Service Description (if relevant) into their various boxes. Only NSN values present in FLIS may be auto filled (see **Figure 3.23**). If an End Item does not have a part number or NIIN, users can enter a Nomenclature in the part number box.

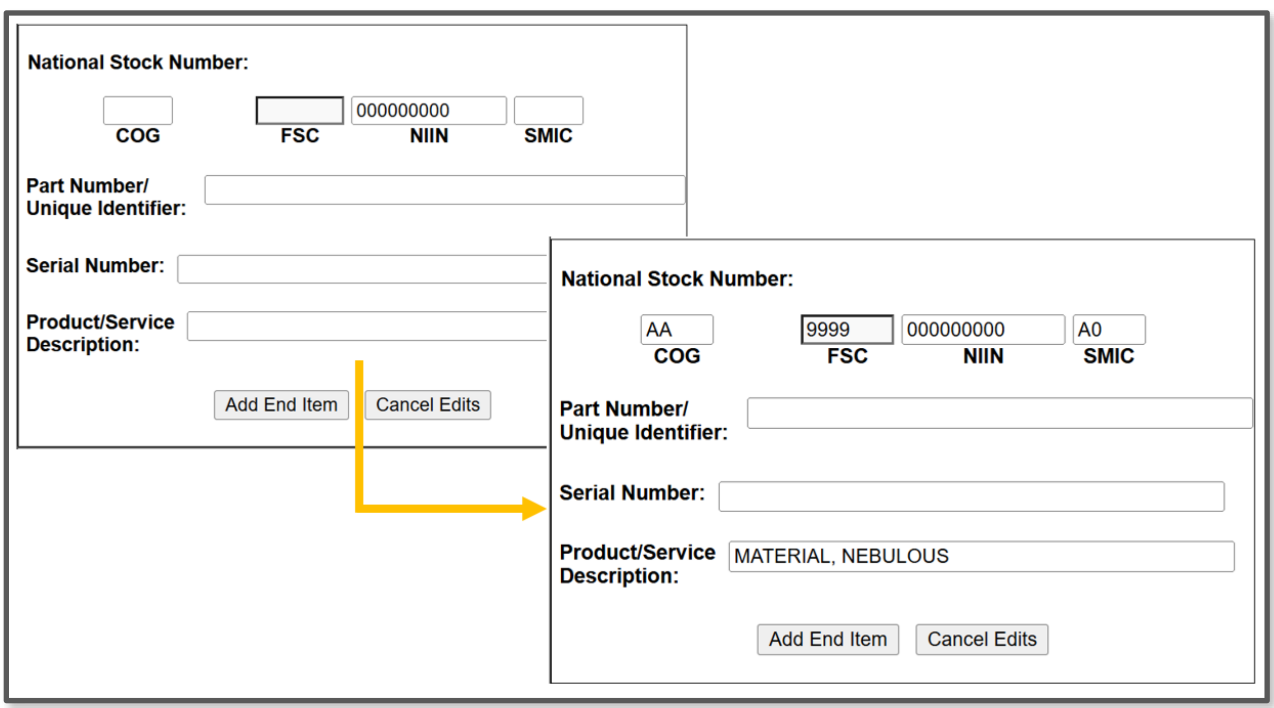


Figure 3.23

In the absence of a NSN, two additional identifiers (such as the Product/Service Description and the Part Number/Unique Identifier or Serial Number) are required before the End Item can be added to the End Item Table. To support Deliverable Product and Deliverable Service Evaluations, it is recommended that a FSC be provided when adding End Items. If the deliverable of a contract is a service, a PSC Code may also be utilized in the FSC field combined with a Product/Service Description. Both FSCs and PSCs can be found in the associated contract under most circumstances.

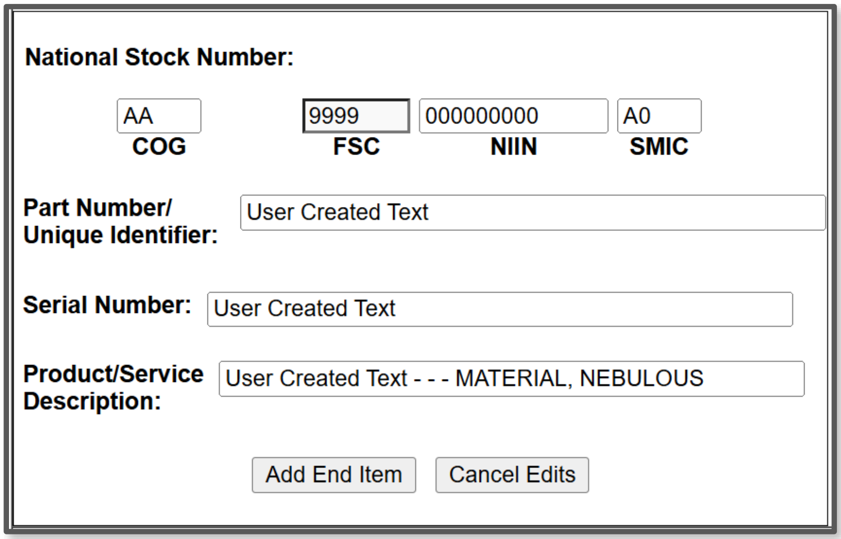


Figure 3.24

Figure 3.24 shows an example of an End Item with all values and text entered. The "Add End Item" button is used to apply the End Item to the End Item Table. The table is located beneath the End Item entry box as shown in **Figure 3.25** but is hidden when the Plan lacks an End Item. Once all End Items have been applied to the End Item Table, the "Save" button <u>must</u> be used to capture all work.

Note: *When working within the KTR Details Page (displayed as the "Multi-Function Surveillance Plan"), saving is required to capture the additions made to the various sections. The "Save" button (located at the top and middle of the page) <u>must</u> be used to preserve entries. PDREP does not have an auto-save feature. This means the tool needs to be told to keep the information. This is done through the save action. <u>If the "Save" button is not used, work will NOT be saved!</u>*

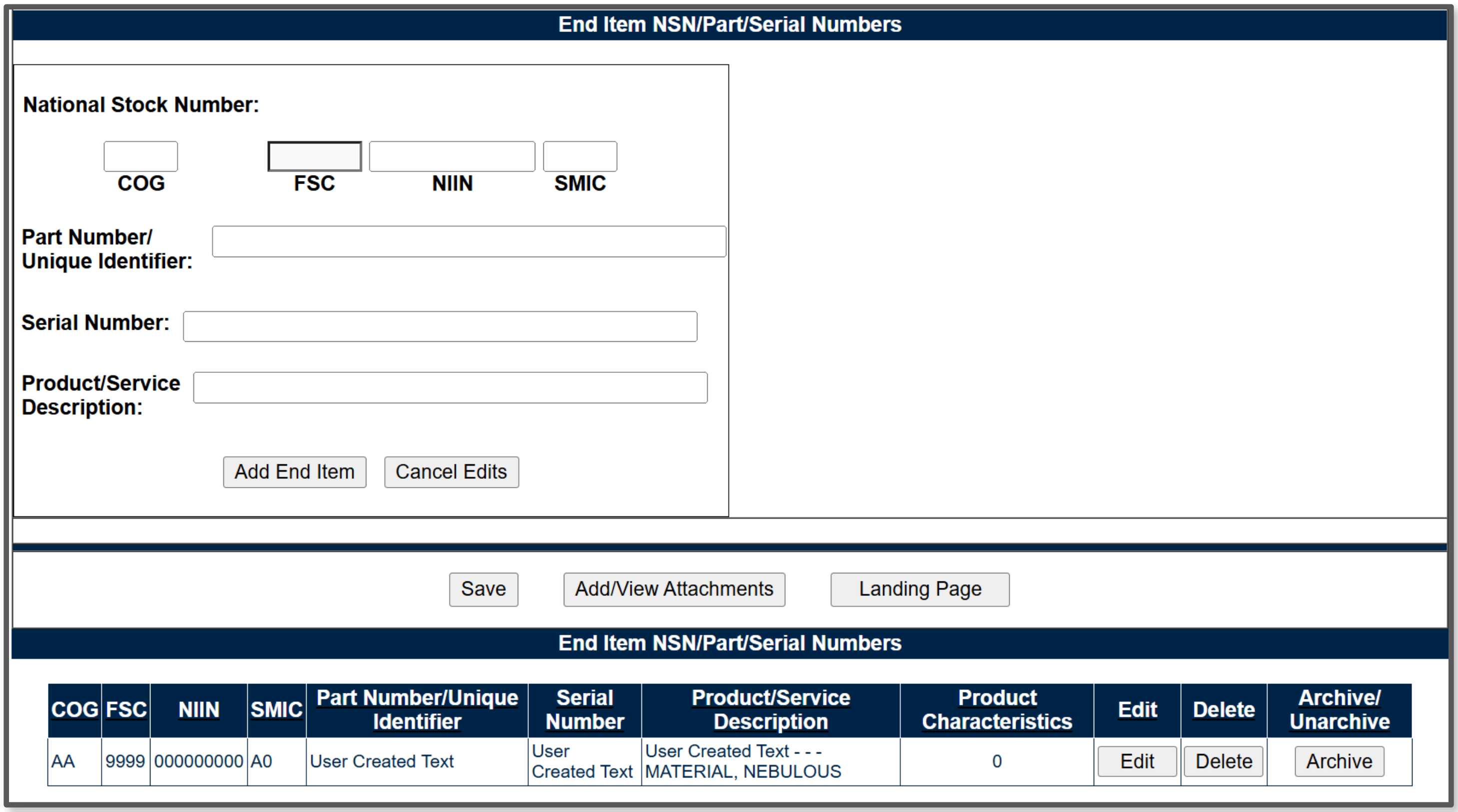


Figure 3.25

Associated Button Functionality for **Figure 3.25**

- **Add End Item:** Applies the End Item and associated information into the End Item Table.
- **Add/View Attachments:** The "Add/View Attachments" button allows uploading, viewing and deleting of Plan level attachments. Navigation to the attachments page starts by clicking the "Add/View Attachments" button. After the page refresh, the ability to add, view or remove related documents will be available for users with Functional Specialist (or higher) access.

***Note**: Each Plan, Record and subsequently associated IDR's have their own designated space for attachments. This means applied documents are exclusive to the location (level) they are applied and will not populate elsewhere. For further instructions, please see the user guide on Attaching a File in PDREP, found on the PDREP website under "References" and housed within "Guides and Manuals".*

- **Archive:** This button sets the selected End Item to an "Archive" status.
- **Ascend/Descend:** This functionality is present within the End Item Table data field headers (COG, FSC, NIIN, SMIC, Part Number/Unique Identifier, Serial Number, Product/Service Description, and Product Characteristics) and may be used to display End Items in a desired order (largest to smallest or smallest to largest).
- **Cancel Edits:** Clears values on new entries not yet applied to the End Item Table. When an applied End Item is being edited, this button restores the End Item back to the table unchanged.

- **Delete:** Removes the End Item from the End Item Table. A pop-up message will display requesting confirmation of the delete action as seen in **Figure 3.27**.
    - **OK:** Captures the request and eliminates the End Item from the table.
    - **Cancel:** Refreshes the page and clears the request.

- **Edit:** This button opens the selected End Item to an editable version by populating the associated End Item information into the corresponding data elements within the intake box. An example of this can be seen in **Figure 3.26**.
- **Landing Page:** Navigates the user to the Landing Page of the Plan.
- **Save:** This button may be used at any time to save the contents of the Surveillance Plan.
- **Unarchive:** This button undoes the Archiving action described above.

Associated Data Fields for **Figure 3.25**

- **Product Characteristics:** Number of Product Characteristics applied to the End Item.

3.2.6.2 Edit & Delete End Items

Each End Item captured within the End Item Table can be edited, deleted or archive/unarchive through their corresponding button functionality.

Editing an applied End Item is done by selecting the "Edit" button for the row that correlates with the End Item to be edited. The associated data will be loaded into the End Item intake fields (like that of adding a new End Item) and can be updated accordingly. An example of this is shown in **Figure 3.26**. Once changes have been made, select the "Update End Item" button to capture the revised information, and return the End Item back to the End Item Table.

The "Cancel Edits" button may be used to discard any modifications made and return the End Item back to the table unchanged. An End Item must be in an "Active" status to be edited. End Items in an "Archived" status display a gray "Edit" button identifying that functionality has been removed as shown in **Figure 3.29**.

Note: *The "Save" button (located at the top and middle of the page) <u>must</u> be used to preserve entries. PDREP does not have an auto-save feature. This means the tool needs to be told to keep the information. This is done through the save action. <u>If the "Save" button is not used, work will NOT be saved!</u>*

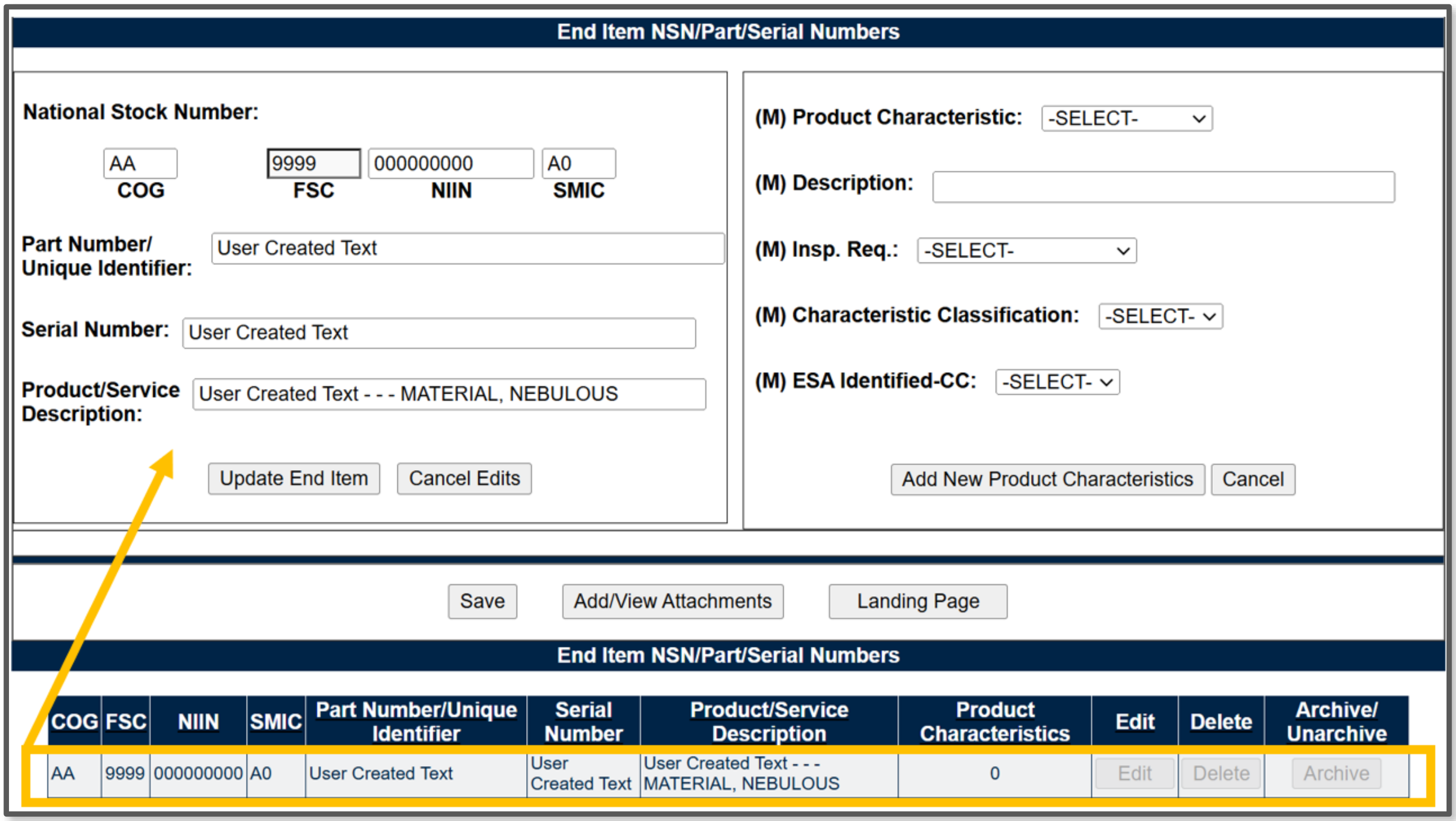


Figure 3.26

To delete an End Item from the End Item Table, select the “Delete” button on the row that correlates with the End Item to be deleted. After confirming the action by selecting “OK” on the pop-up (**Figure 3.27**), the End Item will be eliminated from the End Item Table.

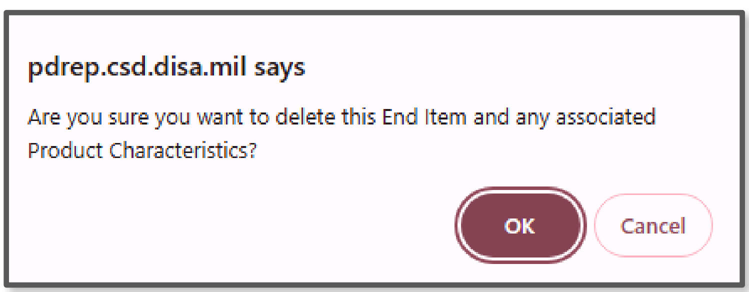


Figure 3.27

End Items can only be deleted when they are not applied to a Record (regardless of the Record status). If a user attempts to delete an End Item that’s applied to a Record, an error message will generate. An example of this is shown in **Figure 3.28**. Only after an End Item is removed from all applied Records may it be deleted from the Plan.

End Item NSN/Part/Serial Numbers

- The selected **End Item** has been assigned to a Record and cannot be removed.

Figure 3.28

End Items applied to the End Items Table default to an “Active” status. Should an applied End Item need to be “Archived”, select the “Archive” button on the row that correlates with the End Item to be archived. After the page refresh, the selected End Item will be relocated to the bottom of the End Items Table and grayed out indicating it’s “Archived” status. When this change occurs, the “Unarchive” button also replaces that of the previous “Archive” button as shown in **Figure 3.29**.

End Item NSN/Part/Serial Numbers

COG	FSC	NIIN	SMIC	Part Number/Unique Identifier	Serial Number	Product/Service Description	Product Characteristics	Edit	Delete	Archive/ Unarchive
12	AN15			PARTNUMBER	SERIALNUMBER	HEALTH R&D SERVICES; HEALTH CARE SERVICES; EXPENSES FOR R&D FACILITIES AND MAJOR EQUIPMENT	3	Edit	Delete	Archive
AA	9999	000000000	A0	Entered Part Number	Entered Serical Number	MATERIAL, NEBULOUS	0	Edit	Delete	Archive
	AG54					UPDATED PRODUCT/SERVICE DESCRIPTION	1	Edit	Delete	Archive
	AH14					NATURAL RESOURCES AND ENVIRONMENT R&D SERVICES; WATER RESOURCES; R&D ADMINISTRATIVE EXPENSES	3	Edit	Delete	Archive
9B	4820	016696142	CP	33-22-3322	1234567-8910	REBUILD KIT VALVE	1	Edit	Delete	Unarchive

Figure 3.29

End Items can only be archived after they’ve been successfully applied to the End Item Table, saved to the KTR details page, and are not present within a draft record. End Items archived prior to being saved will continue to display only while working on the KTR details page but will ultimately be expunged from the End Item Table. If a user attempts to archive an End Item that’s applied to a Record with a “Draft” status, an error message will generate. An example of this is shown in **Figure 3.30**. Only after all associated Records have been completed or deleted may the End Item be archived.

End Item NSN/Part/Serial Numbers

- The selected **End Item** has been assigned to a Record and cannot be archived.

Figure 3.30

Once an End Item has been archived, it may be unarchived at any point in the future. To unarchive an End Item, select the “Unarchive” button on the row that correlates with the End Item to be unarchived. After the page refresh, the selected End Item will be restored to an “Active” status, with the tool automatically moving it from the bottom of the End Item Table. The rows gray fill is removed, and the End Items status is changed to “Active” once again.

3.2.7 Product Characteristics

Product Characteristic(s) allows for capturing the associated attributes of an End Item within the Plan.

3.2.7.1 Adding Product Characteristics

To add Product Characteristic(s), select the “Edit” button on the row that correlates with the desired End Item. Above the End Item Table, the associated data will be loaded into the End Item intake fields (like that of adding a new End Item) with the Product Characteristic intake area next to it on the right (see **Figure 3.31**).

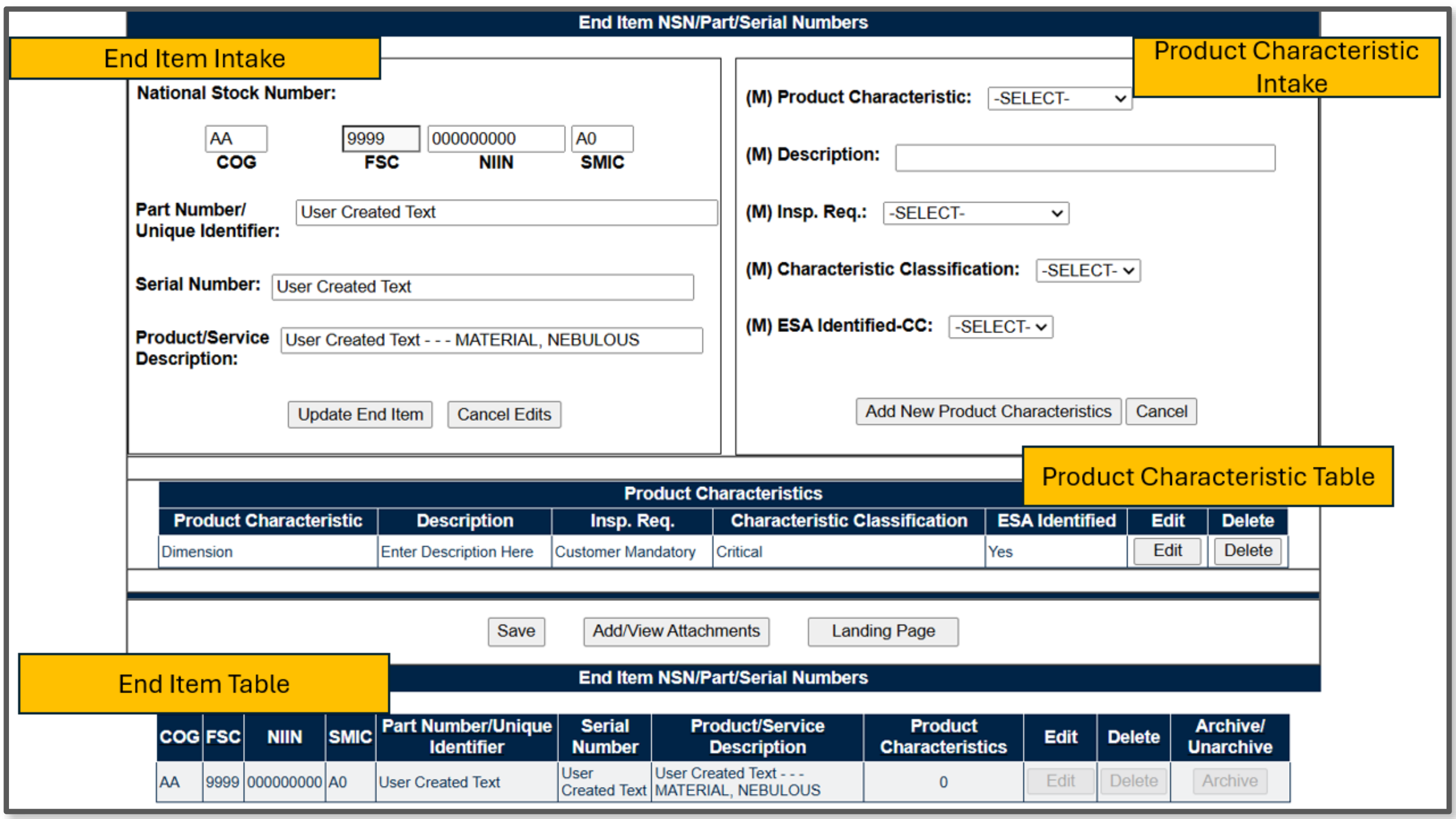


Figure 3.31

The Product Characteristic intake area contains a total of five mandatory data fields (**Figure 3.32**). Use the drop-down to select the “(M) Product Characteristic” type. Next, fill in the “(M) Description” before selecting the “(M) Insp. Req.” from the drop-down. Finally, determine the “(M) Characteristic Classification” and the “(M) ESA Identified-CC” via their perspective drop-downs. The “Add New Product Characteristic” button will capture the entry and apply it to the Product Characteristic Table. Repeat this process as necessary to capture additional Product Characteristics.

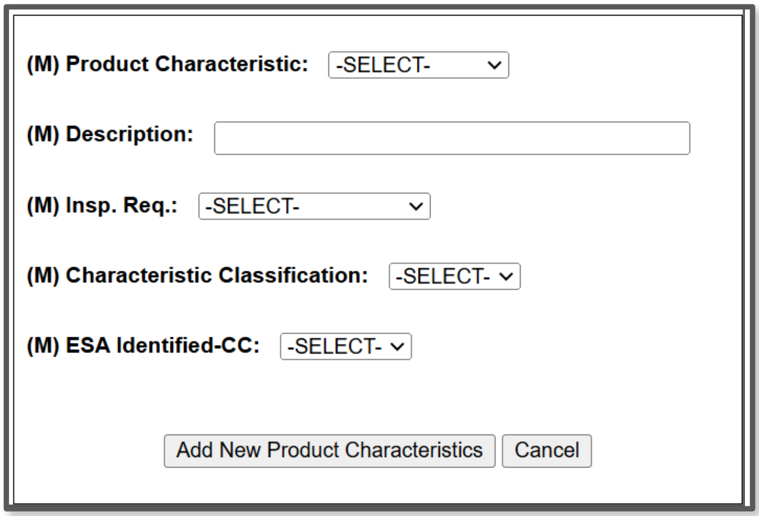


Figure 3.32

If a selection or entry isn't made for each of the five data fields, an error message will display beneath the "End Item NSN/Part/Serial Number" banner notifying the user of which field requirement(s) have not been met. An example of this is shown in **Figure 3.33**.

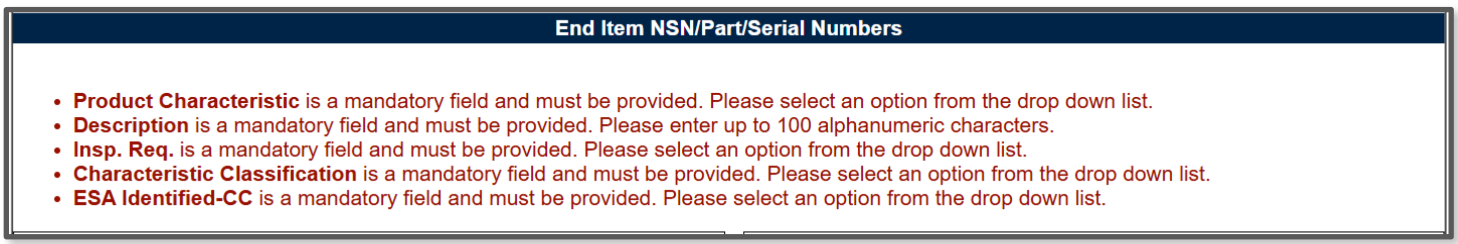


Figure 3.33

The Product Characteristic Table is located beneath the Product Characteristic intake box (area) as shown in **Figure 3.34** but is hidden when the End Item lacks a Product Characteristic.

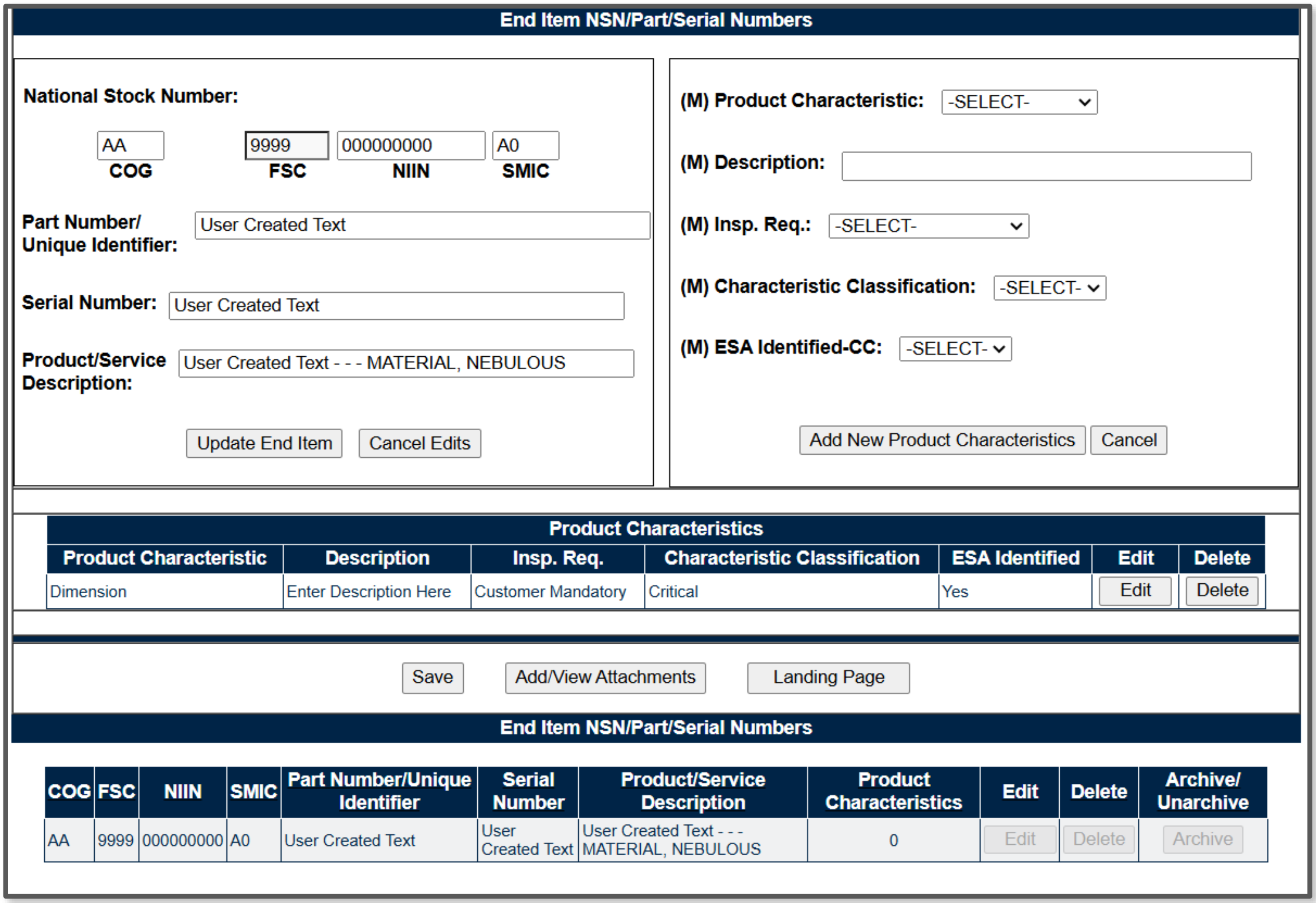


Figure 3.34

Product Characteristic Intake

Associated Data Fields for **Figure 3.34**

- **(M) Characteristic Classification:** Select one of the five Characteristic Classification types from the provided drop-down.
  - Critical
  - Major
  - Minor
  - N/A
  - Unknown
- **(M) Description:** An open text box with a maximum limit of 100 characters for entering the Description of the Product Characteristic.

- **(M) ESA Identified-CC:** Select one of the three ESA Identified-CC types from the provided drop-down.
    - N/A
    - No
    - Yes
- **(M) Insp. Req.:** Select one of the two Inspection Required types from the provided drop-down.
    - Customer Mandatory
    - DCMA Risk Based
- **(M) Product Characteristic:** Select one of the three Product Characteristic types from the provided drop-down.
    - Dimension
    - Other
    - Process Output
- **Product Characteristics Table:** An accumulation of Product Characteristic, Description, Insp. Req., Characteristic Classification and ESA Identified data fields being applied to the table as one entry (row) of the selected End Item.

Product Characteristic Intake
Associated Button Functionality for **Figure 3.34**

- **Add New Product Characteristics:** This button captures and applies the five Product Characteristic data fields (*Product Characteristic, Description, Insp. Req., Characteristic Classification and ESA Identified*) to the Product Characteristic Table as a one row entry. Though the table can accommodate multiple Product Characteristics, it will be hidden until the first Product Characteristic is applied. Repeat this process as necessary to capture additional Product Characteristics.
- **Cancel:** Clears values on new entries not yet applied to the Product Characteristic Table. When an applied Product Characteristic is being edited, this button restores the Product Characteristic back to the table unchanged.

Product Characteristic Table
Associated Button Functionality for **Figure 3.34**

- **Delete:** Removes the Product Characteristic from the Product Characteristic Table. This action occurs when the corresponding “Delete” button is clicked. A pop-up message will display requesting confirmation of the delete action as seen in **Figure 3.38**.
    - **OK:** Captures the request and eliminates the Product Characteristic from the table.
    - **Cancel:** Refreshes the page and clears the request.

- **Edit:** This button opens the selected Product Characteristic to an editable version by populating the associated Product Characteristic information into the corresponding data elements within the intake box.

Once all Product Characteristics have been applied to the Product Characteristic Table, the End Item must be applied back to the End Item table. This is done by selecting the “Update End Item” button. In order for the Plan to retain all End Item updates, the “Save” button <u>must</u> be used. When the KTR details page has been successfully saved, a confirmation message will display above the “Save” button as shown in **Figure 3.35**.

Note: *When working within the KTR Details Page (displayed as the “Multi-Function Surveillance Plan”), saving is required to capture the additions made to the various sections. The “Save” button (located at the top and middle of the page) <u>must</u> be used to preserve entries. PDREP does not have an auto-save feature. This means the tool needs to be told to keep the information. This is done through the save action. <u>If the “Save” button is not used, work will NOT be saved!</u>*

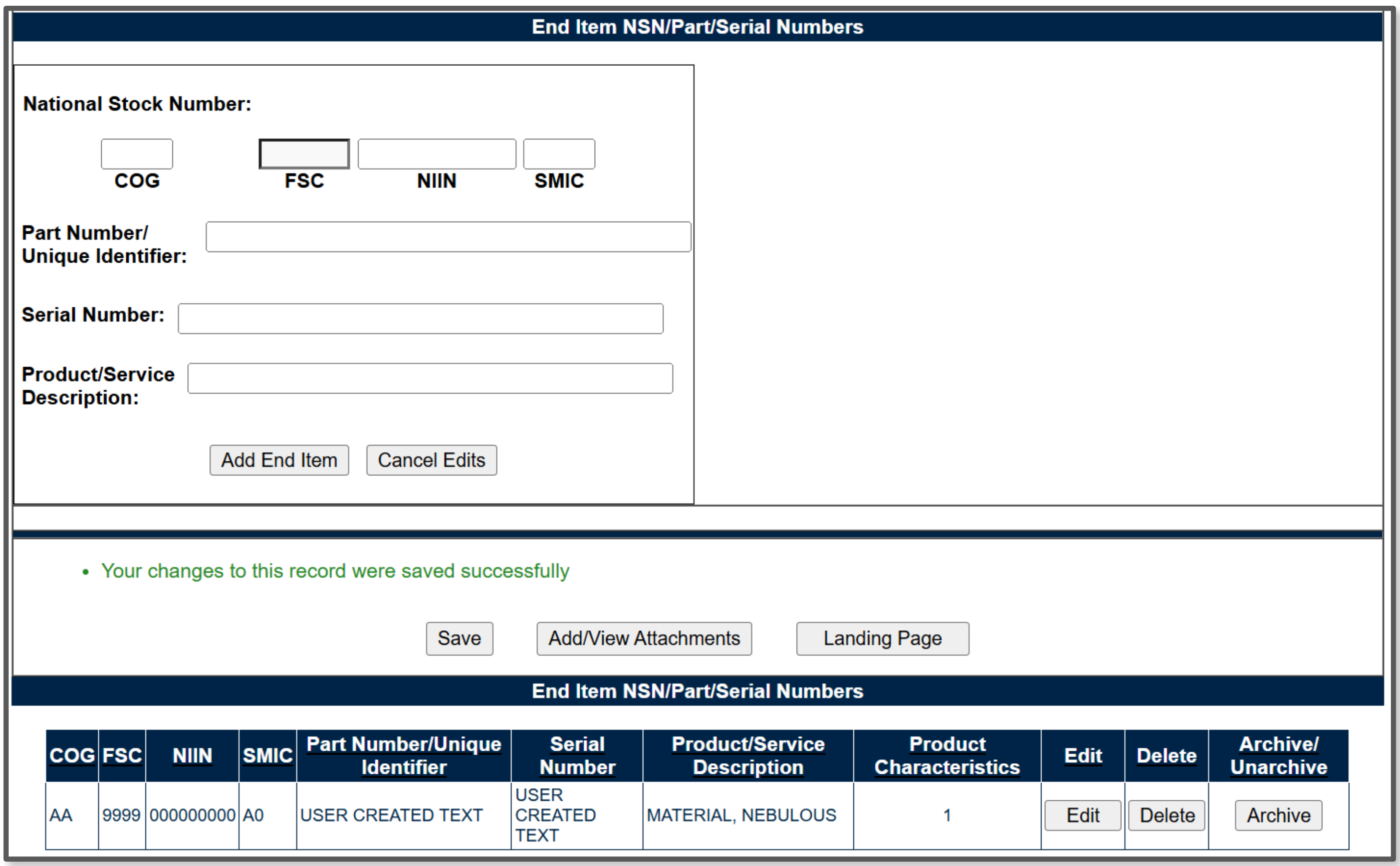


Figure 3.35

If a user attempts to save their work while an End Item is in an editable state, an error message will display as shown in **Figure 3.36**. When this occurs, changes to the KTR Details page have not been captured. In order to successfully save, the End Item will need to be returned to the End Item Table and the “Save” button will once again need to be used.

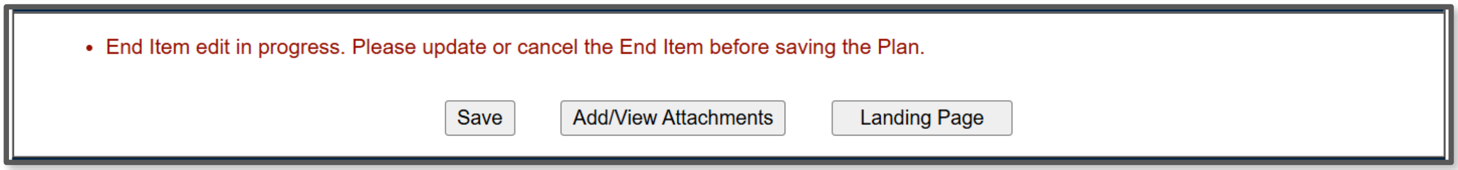


Figure 3.36

3.2.7.2 Edit & Delete Product Characteristics

Editing and Deleting a Product Characteristic can only be done on End Items in an editable state. When an End Item is editable, the corresponding row will be grayed. Each Product Characteristic captured within the End Item’s Product Characteristic Table can be edited or deleted through their corresponding button functionality.

Editing a Product Characteristic is done by selecting the “Edit” button for the row that correlates with the Product Characteristic to be edited. The associated data will be loaded into the Product Characteristic intake fields and can be updated accordingly. Once changes have been made, select the “Update Product Characteristic” button to capture the revised information, and return the Product Characteristic back to the End Items Product Characteristic Table.

The “Cancel” button may be used to discard any modifications made and return the Product Characteristic back to the table unchanged. When a Product Characteristic is being edited, the corresponding row will be grayed identifying which Product Characteristic is in an editable state. An example of this is shown in **Figure 3.37**.

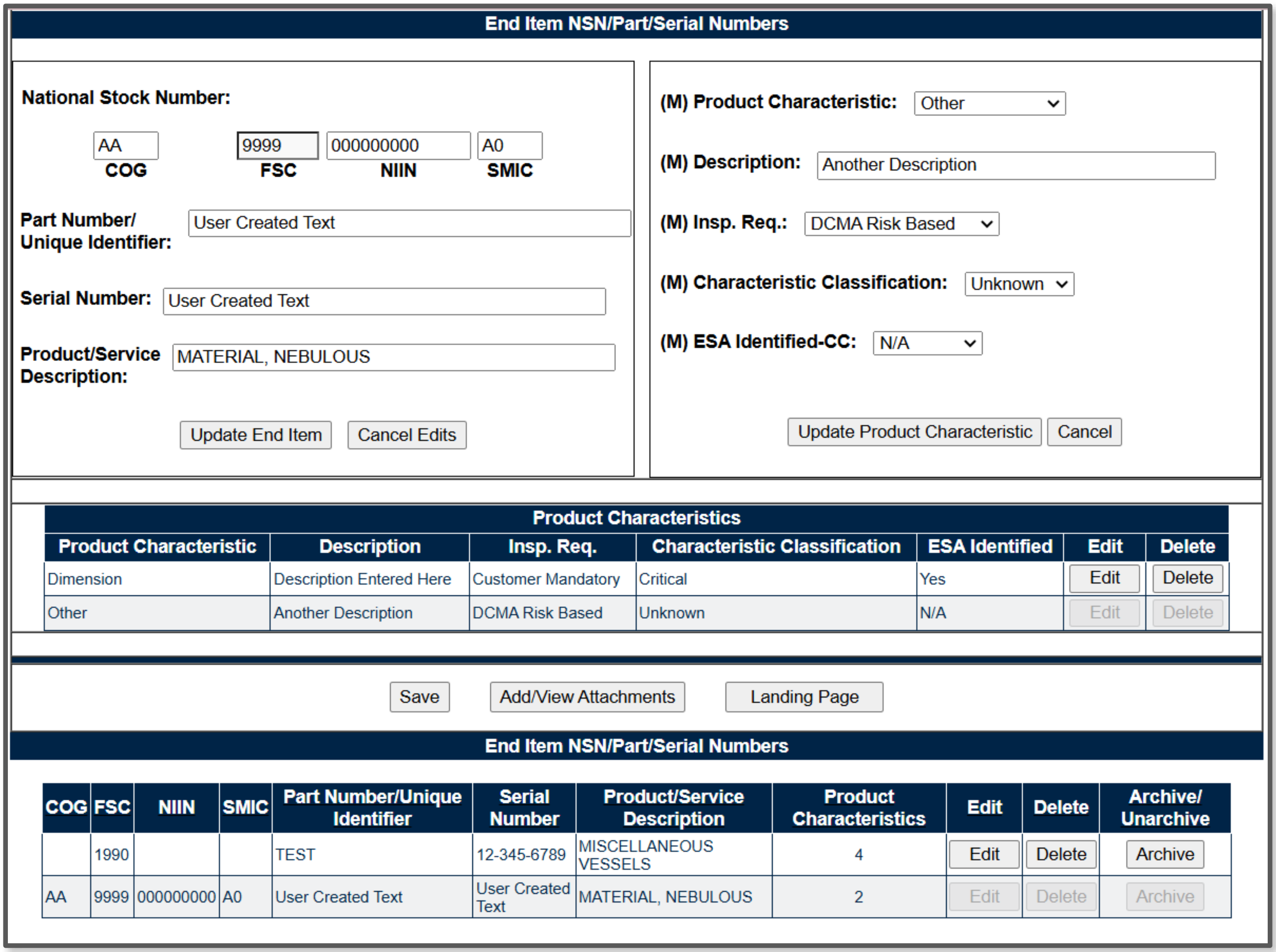


Figure 3.37

To delete a Product Characteristic, select the “Delete” button aside the desired Product Characteristic. After confirming the action by selecting “OK” on the pop-up (**Figure 3.38**), the Product Characteristic will be eliminated from the table.

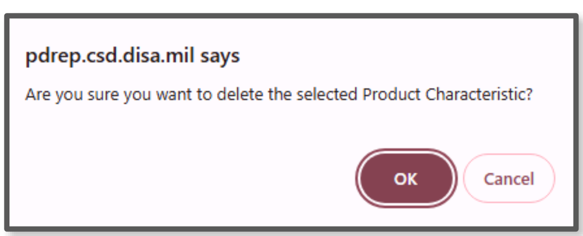


Figure 3.38

A Product Characteristic that is associated with an Inspection Details Report (IDR) cannot be deleted regardless of the IDR’s status. If a user attempts to delete an End Item that’s applied to a Record an error message will generate as shown in **Figure 3.39**.

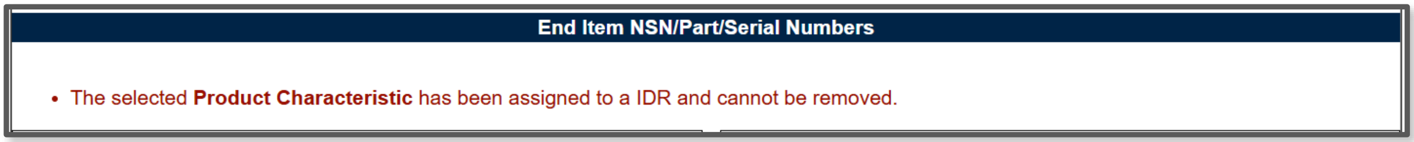


Figure 3.39

Once all Product Characteristics have been updated and applied back to the Product Characteristic Table, the End Item must also be applied back to the End Item Table. This is done by selecting the "Update End Item" button. In order for the Plan to retain all End Item updates, the "Save" button <u>must</u> be used. When the KTR details page has been successfully saved, a confirmation message will display above the "Save" button as shown in **Figure 3.35**.

Note: *When working within the KTR Details Page (displayed as the "Multi-Function Surveillance Plan"), saving is required to capture the additions made to the various sections. The "Save" button (located at the top and middle of the page) <u>must</u> be used to preserve entries. PDREP does not have an auto-save feature. This means the tool needs to be told to keep the information. This is done through the save action. <u>If the "Save" button is not used, work will NOT be saved!</u>*

3.2.8 Duplicate End Items

Existing Plans may contain duplicate End Items. However, as of the May 2024 publish the End Item Table no longer allows duplicate entries. Entries are considered duplicate when the NSN (COG + FSC + NIIN + SMIC), Part Number/ Unique Identifier and Product/Service Description match character for character. Any variance, including spaces are considered a new entry and will be allowed.
End Item validation is done when a user attempts to apply the End Item to the table via the "Add End Item" button. If an End Item is a duplicate and an attempt has been made to add it to the table, a popup message will disply notifying the user of the existing End Item, along with a banner message of the attempt. The End Item Table will highlight the match (as shown in **Figure 3.41**) and will bring the user to the existing End Item when the pop-up notification is acknowledged and cleared.

For example, the End Item intake of **Figure 3.40** matches that of an existing End Item already applied to the End Item Table.

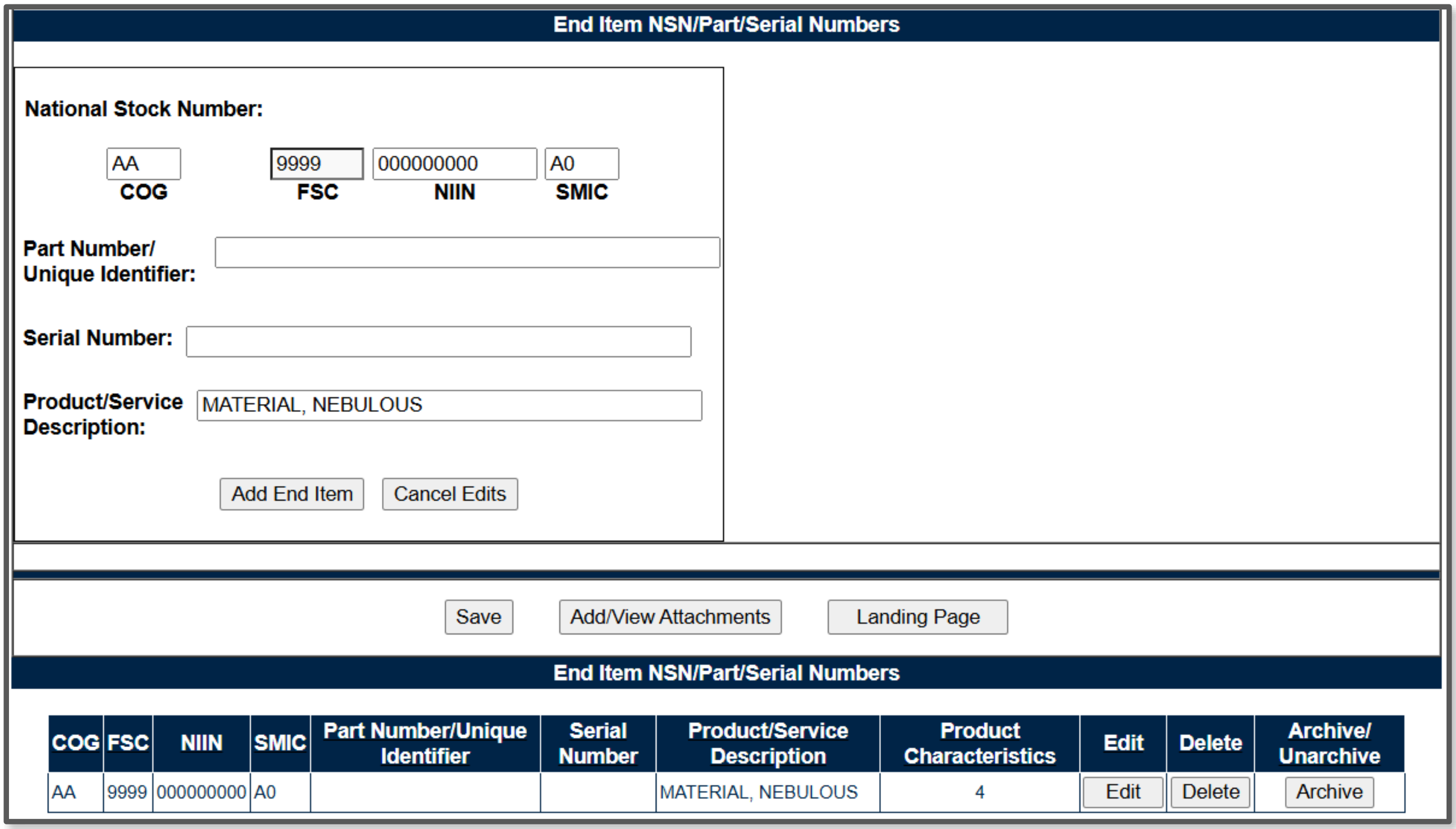


Figure 3.40

The “Add End Item” button initiates the SP tool validation and determines that an End Item already exists with identical information (character for character) within table and disallowes the duplicate End Item from being applied to the table as seen in **Figure 3.41**.

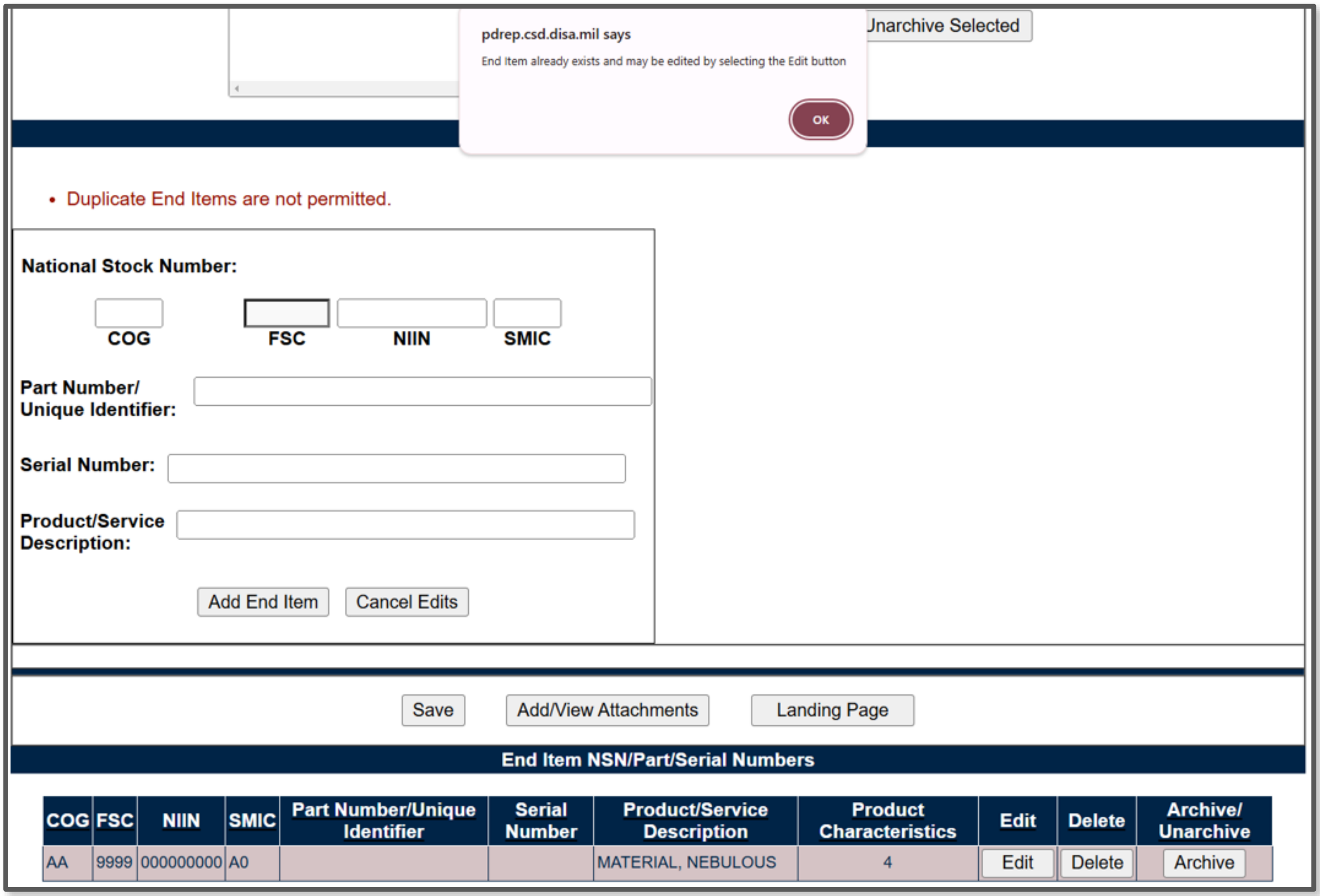


Figure 3.41

Existing End Items should be reviewed before a similar entry is applied to the End Item Table. This helps to avoid inadvertantly adding an unnecessary End Item that slightly varies from an existing entry. An example of this is shown in **Figure 3.42** and in **Figure 3.43**. Both examples display differing End Items that may in fact be a field duplicate.

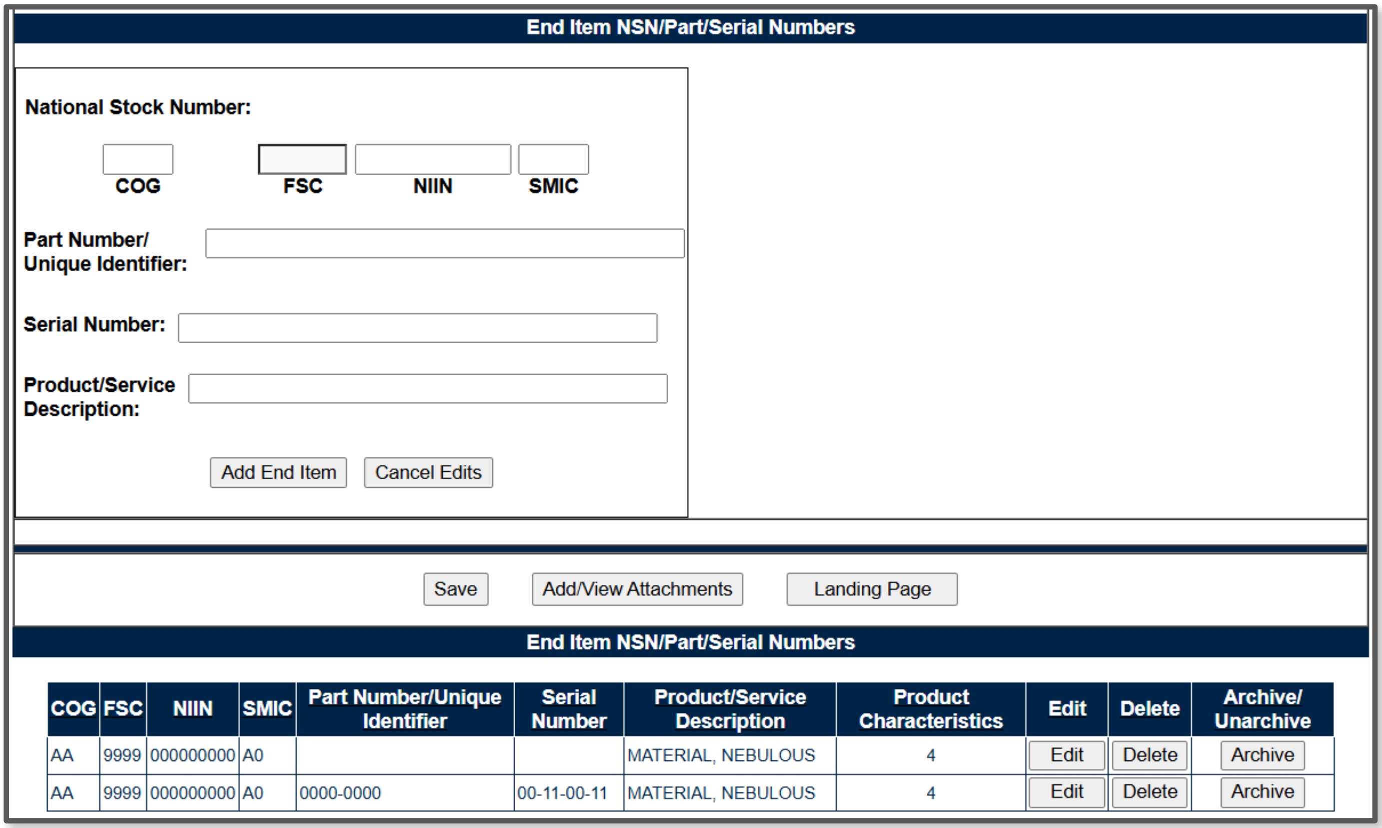
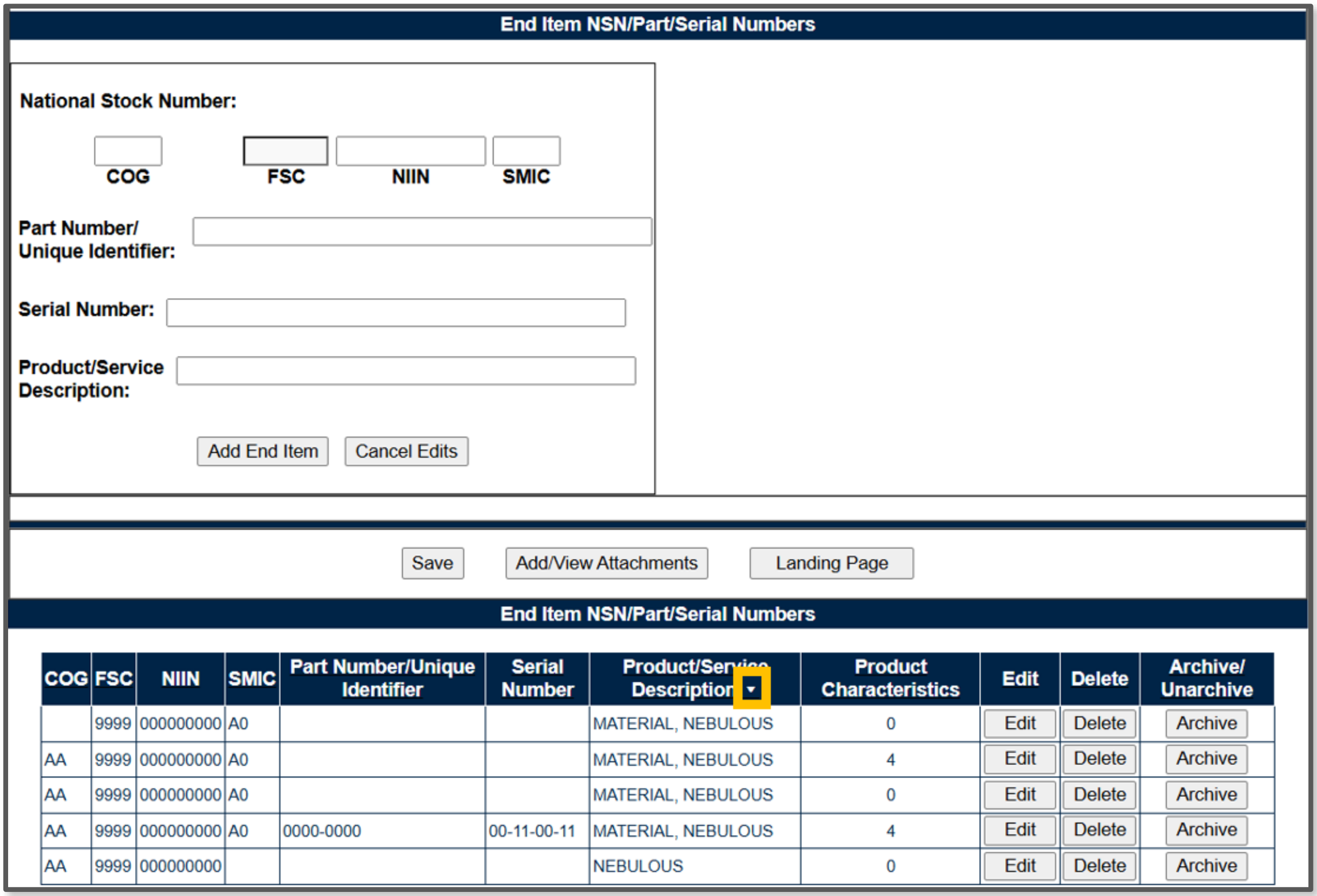


Figure 3.42

To assist users in locating similar End Items within the table, data field headers have been equipped with ascend and descend functionality. By clicking the header of COG, FSC, NIIN, SMIC, Part Number/Unique Identifier, Serial Number, Product/Service Description, or Product Characteristics, the table will reconfigure and display entries ascending by selected group and then descending if clicked again. An ascension/descension arrow is applied to the header notating how the table is organized An example of this is shown in **Figure 3.43**.



End Item NSN/Part/Serial Numbers

National Stock Number:

COG FSC NIIN SMIC

Part Number/ Unique Identifier:

Serial Number:

Product/Service Description:

Add End Item Cancel Edits

Save Add/View Attachments Landing Page

End Item NSN/Part/Serial Numbers

COG	FSC	NIIN	SMIC	Part Number/Unique Identifier	Serial Number	Product/Service Description	Product Characteristics	Edit	Delete	Archive/ Unarchive
	9999	000000000	A0			MATERIAL, NEBULOUS	0	Edit	Delete	Archive
AA	9999	000000000	A0			MATERIAL, NEBULOUS	4	Edit	Delete	Archive
AA	9999	000000000	A0			MATERIAL, NEBULOUS	0	Edit	Delete	Archive
AA	9999	000000000	A0	0000-0000	00-11-00-11	MATERIAL, NEBULOUS	4	Edit	Delete	Archive
AA	9999	000000000				NEBULOUS	0	Edit	Delete	Archive

Figure 3.43

3.2.9 Linked PDREP Records

PDREP-AIS is repository for various other record types that may also have a correlation to the Surveillance Plan. This is due to the relational database containing other types of Suppliers and Product Performance Information (SPPI). The linkage between Surveillance Plans and additional information housed within differing PDREP modules is by the CAGE Code. These various record types are displayed and viewable via the hyperlinks provided (when applicable) at the bottom of the Plan within their Module Table. Users must have permission to access each additional module in their profile to view associated Records.

Each module table contain a one-year rolling snapshot of Records created in the PDREP-AIS within that timeframe where the CAGE Code listed on these Records matches that of the Prime CAGE for the Surveillance Plan. An example of this may be seen in **Figure 3.44**.

Note: *Some record types will only contain data from certain services. The information displayed is data that has been fabricated (not real) for example purposes.*

SUPPLIER AUDITS & ASSESSMENTS (1 Year)						
Audit I.D. Number	DCMA Participated	Corrective Action Completed	Date Audited	Process(es)	Process Audit Date	Audit Result
N39040-20230001	Y	YES	05/25/2023	HYDROSTATIC TESTING	05/25/2023	SATISFACTORY

MATERIAL INSPECTION RECORD (1 Year)			
MIR #	Quantity Received	Quantity Rejected	Inspection Date
N45112-23112312	1	1	08/22/2022
N45112-21002122	10	3	08/31/2022
N39040-22012003	1	0	01/12/2023
N39040-23129004	10	10	05/09/2023
N39040-23130002	10	10	05/10/2023
N39040-23145001	1	0	05/25/2023
N39040-23145002	1	1	05/25/2023

CORRECTIVE ACTION REQUESTS (1 Year)					
CAR #	Level	Status	Prime Contractor CAGE	Contract Number	Transmitted Date
PDREP-2022-111	LEVEL I	CLOSED - COMPLETED	PDREP		09/13/2022
PDREP-2023-14	LEVEL I	CAP APPROVED	PDREP		05/04/2023
PDREP-2022-95	LEVEL II	CLOSED - COMPLETED	PDREP		08/26/2022
PDREP-2022-100	LEVEL II	CAR TRANSMITTED	PDREP		09/06/2022
PDREP-2022-103	LEVEL II	CAR TRANSMITTED	PDREP		09/07/2022
PDREP-2022-106	LEVEL II	CAR TRANSMITTED	PDREP		09/07/2022
PDREP-2022-108	LEVEL II	CAR TRANSMITTED	PDREP		09/07/2022
PDREP-2022-109	LEVEL II	CAR TRANSMITTED	PDREP		09/07/2022
PDREP-2022-115	LEVEL II	CAP SUBMITTED	PDREP		11/03/2022
PDREP-2023-5	LEVEL II	OASIS DCMA CLOSED	PDREP		01/20/2023
PDREP-2022-113	LEVEL III	CLOSED - COMPLETED	PDREP		11/03/2022
PDREP-2023-7	LEVEL III	OASIS DCMA CLOSED	PDREP		01/26/2023

SURVEY DATA (1 Year)
NO SURVEY RECORDS FOUND FOR THIS CAGE

PRODUCT QUALITY DEFICIENCY REPORT (1 Year)									
RCN	Preparation Date	Category	Status	Critical	Contract #	Qty Received	Qty Deficient	Defect Responsibility	Closed Date
N45112-230010	05/25/2023	2	CORRECTED AND VERIFIED	N		1	1	PRIVATE CONTRACTOR	05/25/2023

Figure 3.44

3.2.9.1 Supplier Audit & Assessments

The Supplier Audit & Assessments (SAA) dataset in the PDREP-AIS contains information regarding Supplier Audits and Assessments performed by the government. Associated SAA Records populate based of the CAGE Code and a creation date within the last 365 days.

3.2.9.2 Material Inspection Record

Hyperlinked - The Material Inspection Record (MIR) dataset in the PDREP-AIS contains technical receipt inspection information for materials supplied by a contractor. Records are typically performed by a receipt inspection Activity or end-user. Information includes what was accepted or rejected on the inspection in the form of Inspection Attributes. Associated MIR Records populate based off the CAGE Code and a creation date within the last 365 days.

3.2.9.3 Corrective Action Requests.

The Corrective Action Requests (CAR) dataset in the PDREP-AIS contains a table of CARs written against the contractor within the one-year window. Future enhancements will enable viewing of, as well as creation of CARs, directly from the Surveillance Plan. Associated CAR populate based of the CAGE Code, a creation date within the last 365 days and a CSR type of *PRIME* or *OASIS*.

3.2.9.4 Survey Data

The Survey dataset in the PDREP-AIS contains Pre-Award Surveys, Post-Award Surveys, and Product Oriented Surveys. Within the SRV Table, identifies Records having the provided (from the SP) CAGE Code and a completion date between the current date and ONE year trailing.

3.2.9.5 Product Quality Deficiency Report

The Product Quality Deficiency Report (PQDR) dataset in the PDREP-AIS contains material deficiency data and is a process used to determine root cause, perform corrective actions and to prevent recurrence of material issues, as well as being the basis for requesting credit for deficient material. PQDRs written against the Surveillance Plan's Primary Location CAGE Code will be listed, regardless of the final disposition or determined root cause. Associated PQDR Records populate based on the CAGE Code for closed & defect responsible (for a private contractor to be liable) within the last 365 days.

3.2.10 Plan Review

Surveillance Plan Reviews can be performed by multiple teams. This is done through the "Send Message" feature located on the Plans Landing Page. Notification of this process is displayed on the KTR Details page under the "Surveillance Plan Review" banner (see **Figure 3.45**).

Though reviews are not mandatory to Activate or Archive a Plan, they may be required per specific DCMA CMO/Region policies. Refer to local procedures to determine if a review is required. For additional information on the SP Landing Page or how to send a review request via correspondence, see **Section 5** of this document.

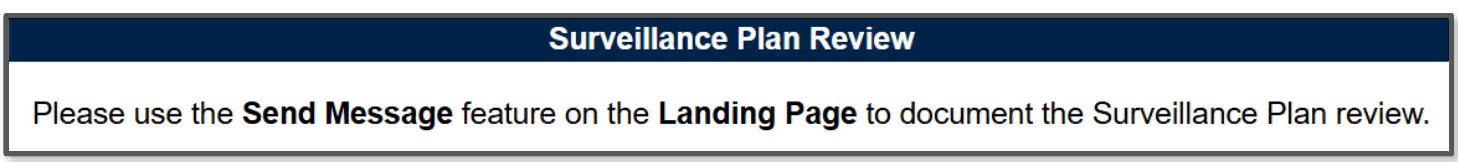


Figure 3.45

3.2.11 Surveillance Plan Status

There are two Surveillance Plan statuses: “Active” and “Archived”.

3.2.11.1 Active Surveillance Plan

Active is the default status when creating a Surveillance Plan. Any user, from any Region or Team, can create and/or work on an “Active” Surveillance Plan. The current Status will display on the Plans Landing Page, along with additional information related to the Plans CAGE, Company Name, Teams within the Plan and the date the last “Save” action occurred. **Figure 3.46** shows an example of this is.

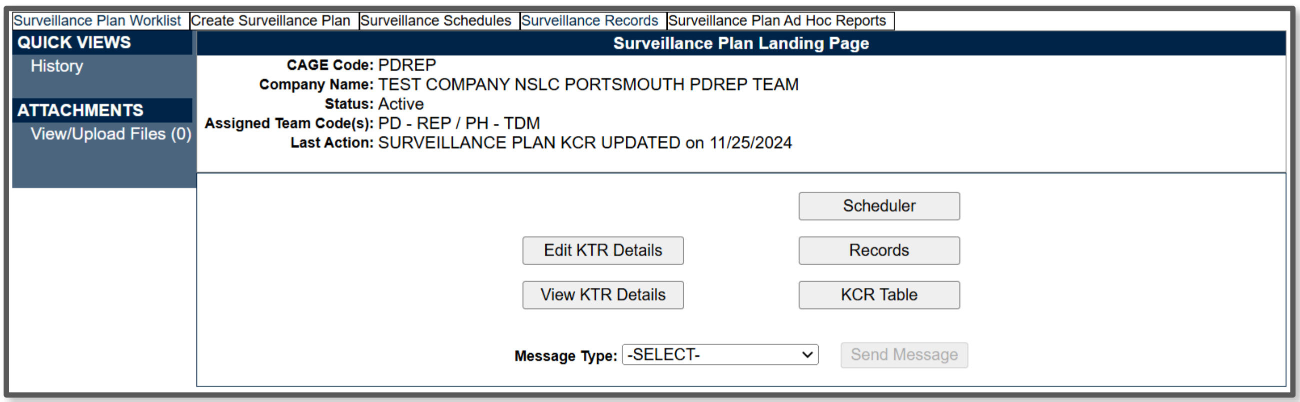


Figure 3.46

Status information can also be located at the bottom of the KTR Details page under the “Active/Close-Out Surveillance Plan” banner. A display of the user who created/activated the Plan along with the date this action took place will display as shown in **Figure 3.47**.

3.2.11.2 Archive Surveillance Plan

A Surveillance Plan must be marked as “Active” before it can be “Archived”. To Archive a Plan, select the “Archive SP” button in the “Activate/Close-Out Surveillance Plan” section, located at the bottom of the KTR Details page and shown in **Figure 3.47**. When a Plan is marked as “Archived”, the “Activate/Close-Out Surveillance Plan” section undergoes a header change and becomes “Reopen Surveillance Plan” (see **Figure 3.48**). The user who archived the plan and the date this action took place will display.

Archived Plans, along with their associated content (KCR’s, Records and IDR’s), are essentially frozen and do not allow for additional work or editing they can subsequently be re-opened if needed.

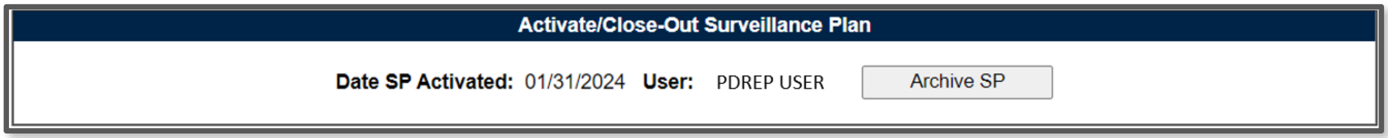


Figure 3.47

Associated Data Fields for **Figure 3.47**

- **Date SP Activated:** Initial creation date of the Plan or any time it was last updated.
- **User:** User who Activated the SP.

Associated Button Functionality for **Figure 3.47**

- **Archive SP:** This button sets the Plan to an "Archived" status. Functionality is disabled throughout the Plan, restricting users to a View only status of all record types. Enables the Plan to be reopened.

3.2.11.3 Activate Surveillance Plan

Though archived Surveillance Plans cannot be added to or edited, they can be reopened which allows for the Plan to once again be worked. To do this, access the archived plans Landing Page and click on the "View KTR Details" navigational button as shown in **Figure 3.48**.

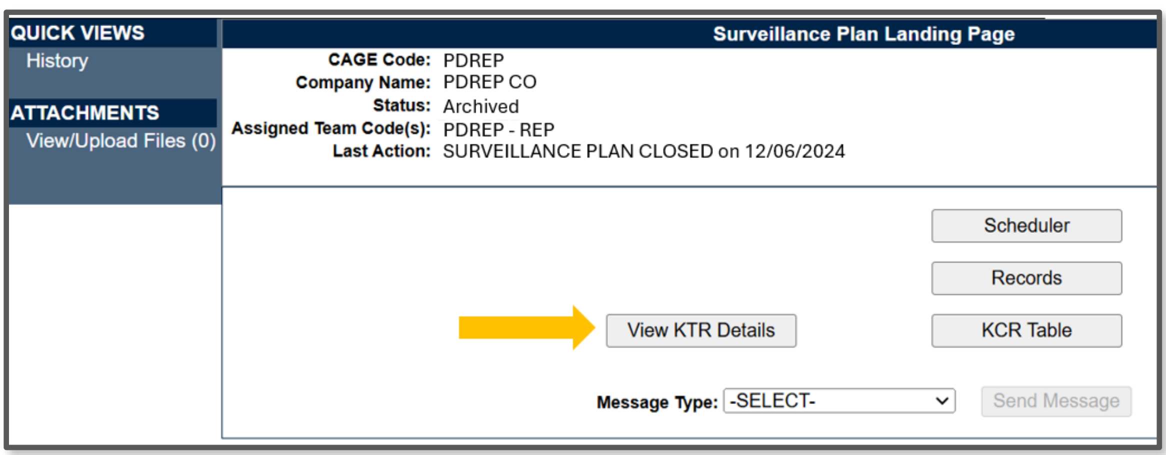


Figure 3.48

Once the KTR Details Page opens, scroll down to the bottom of the page and select the "ACTIVATE SP" button (**Figure 3.49**) to reengage the Plan and set it back to an "Active" status. This action reopens all aspects of the Plan and allows for further work to be done.

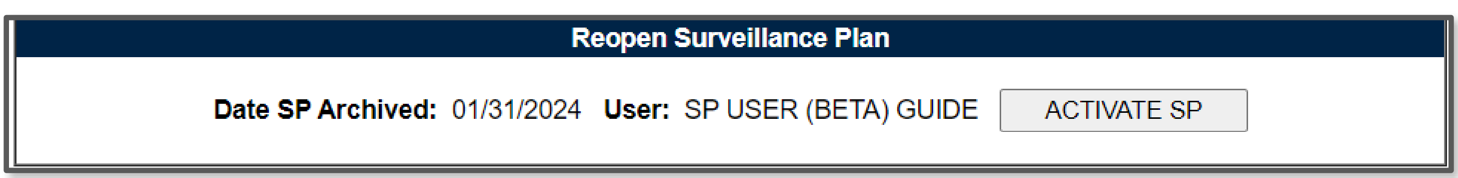


Figure 3.49

Associated Data Fields for **Figure 3.49**

- **Date SP Archived:** The date that the Surveillance Plan was archived.
- **User:** User who archived the SP.

Associated Button Functionality for **Figure 3.49**

- **Reopen SP:** Sets the SP back to Active status to allow for further editing and use.

4 RECORD LOCKING

4.1 Engaging Record Locking

To prevent users from saving over each other, Record Locking was enabled for Surveillance Plans. To engage the lock on a particular Plan, enter a CAGE Code from the Worklist and then select the “Edit KTR Details” button on the SP Landing Page as shown in **Figure 4.1**.

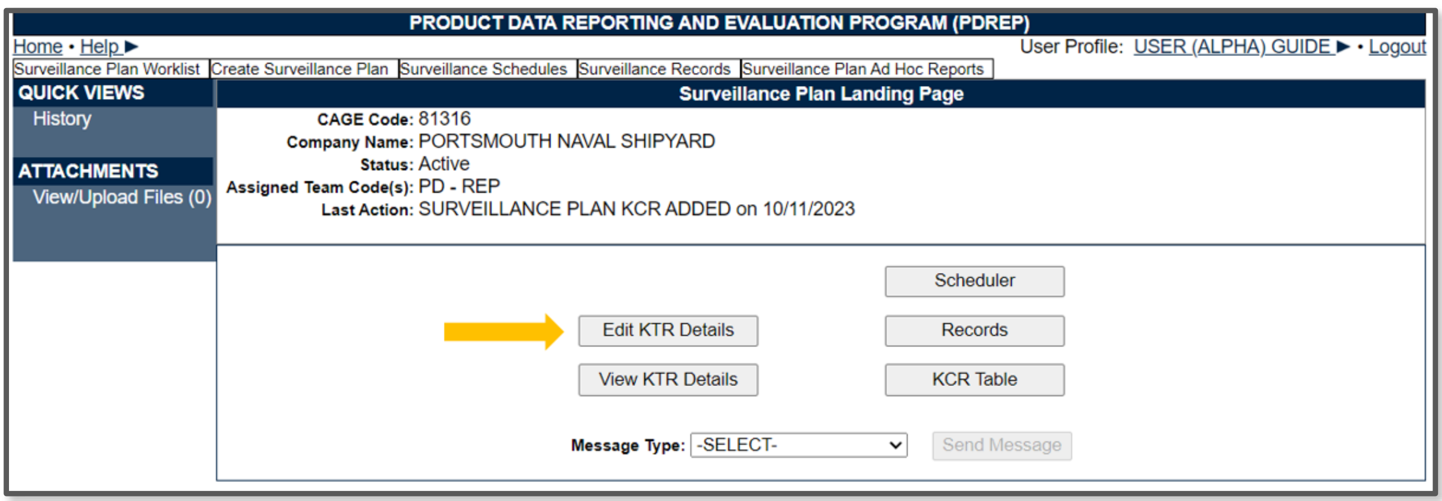


Figure 4.1

4.2 Locked SP Records

Record locking happens when attempting to access the KTR Details page utilized by another user (actively working in it). If a user is performing edits to a Plan, their User ID and Email Address will be displayed to additional users attempting to access the editable version of the same Plan (KTR Details). This is done so additional users know whom to contact if editing capabilities are immediately needed and may coordinate accordingly (see **Figure 4.2** for an example of this message).

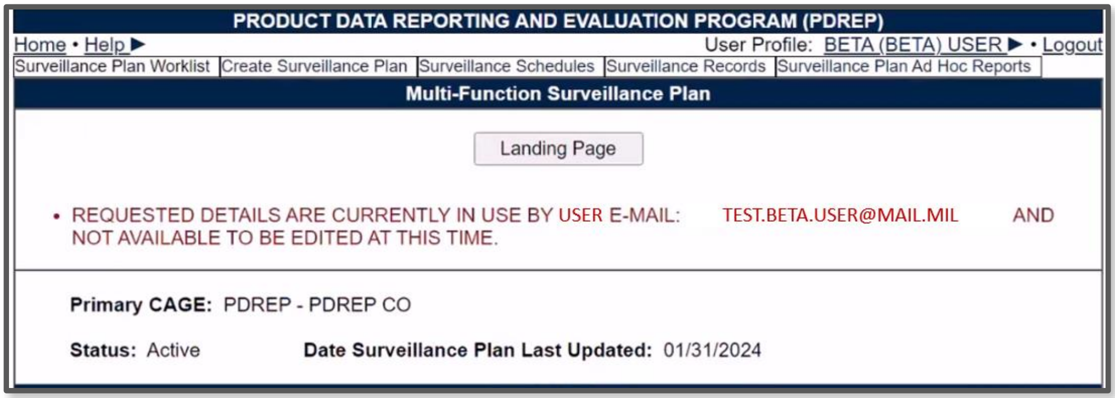


Figure 4.2

4.3 Acquiring/Releasing the KTR

Acquiring and Releasing the KTR is limited to those users with Supervisor or higher access. When such a user attempts to access the KTR Details page occupied by another user, a notification will display indicating which user is working the page. Beneath the notification will be three functional buttons to “Acquire Record”, to “Release Record”, or to navigate to the “Landing Page” as shown in **Figure 4.3**.

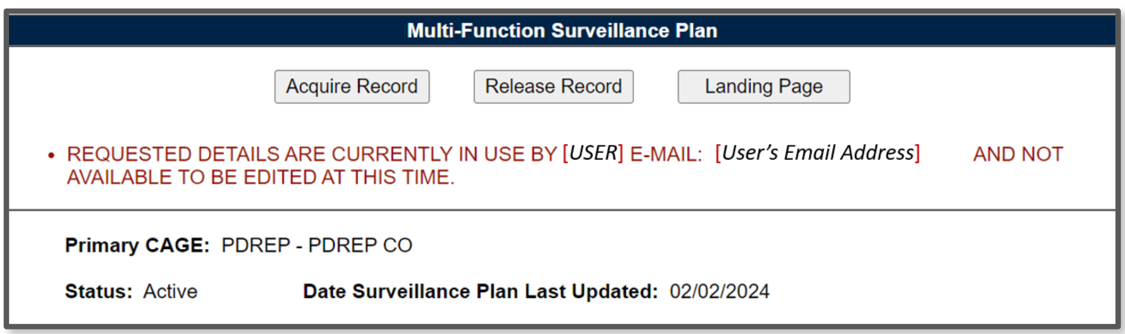


Figure 4.3

Acquiring the KTR moves edit rights from the user whose working in the Plan, to the user acquiring the Plan. To acquire a locked KTR, select the “Acquire Record” button. An editable KTR Details page will display after the page refresh. The initial user will be notified of this change when they attempt to “Save” the Plan. An example of the notification displayed may be seen in **Figure 4.4**.

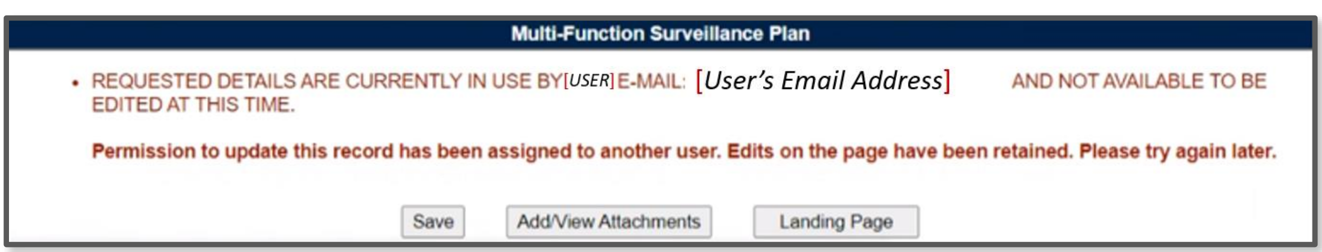


Figure 4.4

Releasing the record lock enables other users to enter the Plan. This is done when the KTR Details page was left improperly (without the use of the “Landing Page” button), or when another user needs immediate access of an occupied Plan.

To release record locking of a locked KTR, select the “Release Record” button. After the page refresh, the Supervisor (or higher access) user is navigated back to the Landing Page, and the Plan’s lock is lifted. This action allows another user access to the Plan outside of the KTR Details page. Access is once again obtained through the navigational button “Edit KTR Details”. A notification of the change in editing rights will display for the user whose editing capabilities were acquired (upon the “Save” action). An example of the notification displayed may be seen in **Figure 4.5**.

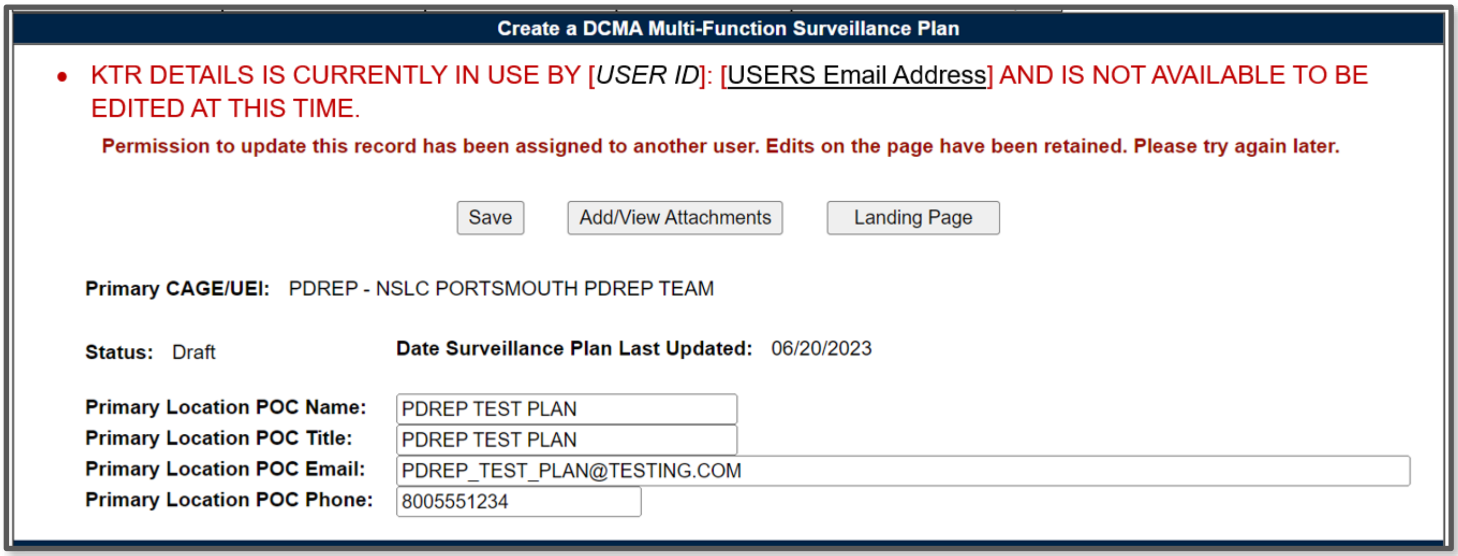


Figure 4.5

Associated Data Fields for **Figure 4.5**

- **Record Locked Display:** User ID and Email of the user working within the Plan.

Associated Button Functionality for **Figure 4.5**

- **Acquire Record:** Used to take ownership of the KTR’s editing rights. Acquiring the record places the record locking in the name of the user selecting to acquire the record.
- **Landing Page:** Navigates the user to the Landing Page of the Plan.
- **Release Record:** Used to open the Plan for a user outside of the KTR Details page. Releasing the record lock enables other users to enter an editable view of the occupied Plan.

4.4 Avoid Record Locking

To allow other Surveillance Plan users access to the KTR Details page and it's editing rights, the "Landing Page" button ***MUST*** be used when leaving the KTR Details Page. The Landing Page button is found at the top of the Surveillance Plan as shown in **Figure 4.6**.

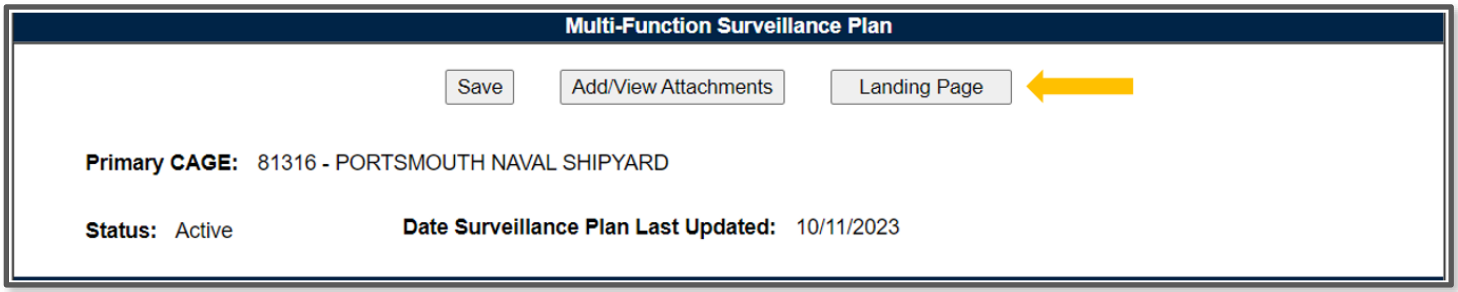


Figure 4.6

If a user leaves the KTR Details page without using the "Landing Page" button, the Plan will remain locked for 15 minutes or until a user with Supervisor (or higher access) releases the record. If a Plan is not released by a Supervisor (or higher) access, the record is automatically unlocked after 15 minutes of inactivity (*page refreshes and saving actions count as activity*).

5 SP LANDING PAGE

When accessing an existing Plan from the Worklist, the first page encountered is the Plan's Landing Page as seen in **Figure 5.1**. This page is essentially the waiting room of the Surveillance Plan. It shows the general information of the SP without the user having to access the KTR Details page. The button functionality allows for movement to other pages within the Plan. The Message Type enables users to send correspondences to other users. This page also houses the Plans History, as well as it's associated documents (at the Plan level).

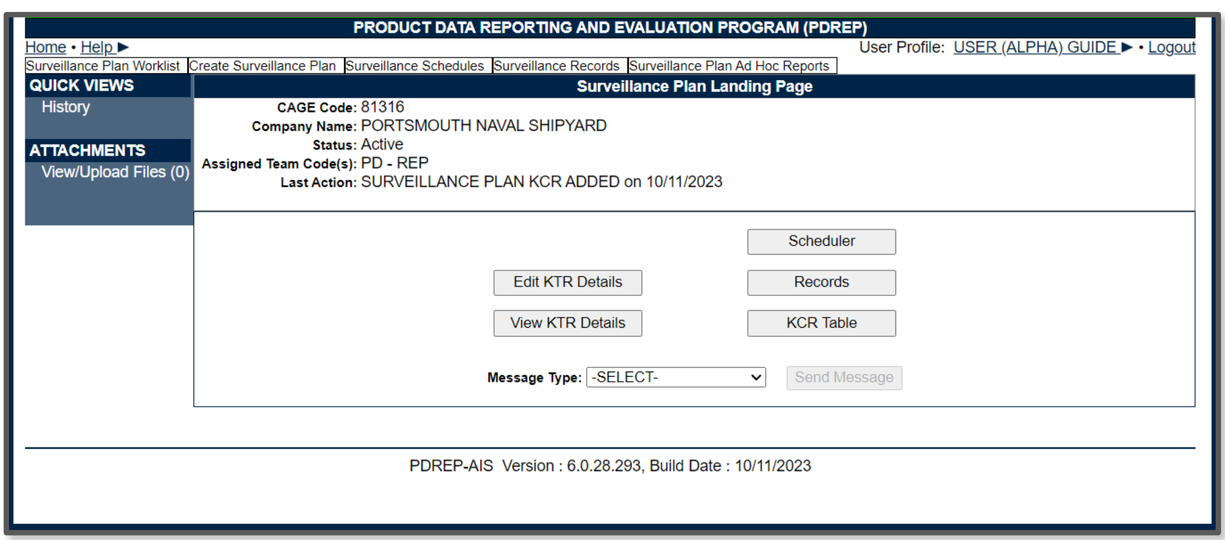


Figure 5.1

Associated Data Fields for **Figure 5.1**

- **Assigned Team Code(s):** Populates associated Team Codes based on list of Assigned Functional Specialists, found within the Plans' KCRs.
- **CAGE Code:** The CAGE Code of the contractor to whom the Surveillance Plan is attributed.
- **Company Name:** The name of the company associated with the Primary Location for the Surveillance Plan. Automatically populates based on the CAGE Code data.
- **Last Action:** The last action performed on the Plan (as recorded by the History page), along with the date (MM/DD/YYYY) the last action occurred.
- **Status:** The status (*Active or Archived*) of the Surveillance Plan.

Associated Button Functionality for **Figure 5.1**

- **Edit KTR Details:** Navigates the user to an editable display of the KTR Details page (the "Create a DCMA Multi-Functional Surveillance Plan" page). Record locking rules apply.
- **KCR Table:** Navigates the user to the Key Contract Requirement Table of the Plan the user is working in.
- **Records:** Navigates the user to the Surveillance Plan Records Page for the Plan the user is working in. The default view of the Records Page displays that of the returned Surveillance Plan's associated KCRs.
- **Scheduler:** Navigates the user to the Surveillance Plan Scheduler. When this button is used, the Scheduler's default will automatically fill and display the Primary CAGE of the Plan the user is working in, along with the User's ID and Team Code pulled from their profile.
- **Send Message:** To access this button, select the Message Type from the drop-down provided. Once enabled (and no longer grayed out), this button initiates the creation of a correspondence and opens to the "Send Message" page.
- **View KTR Details:** This button opens the KTR Details page as a non-editable view.

Associated Links & Other Functionality for **Figure 5.1**

- **History:** This hyperlink opens the reference History of the Plan. Current functionality is limited to displaying History for KCRs and KTR Details.
- **Message Type:** This drop-down provides two correspondence options (General Message & Message to Supervisor) for a user to choose from. Select the desired message type and click the "Send Message" button to initiate the creation of a correspondence and open to the "Send Message" page.
- **View/Upload Files (#):** This hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Plan being worked. The number exhibited in parentheses indicates the number of attachments associated with the Plan. This number does not take into consideration attachments made to any Records or Child Records (IDRs). This means applied documents are exclusive to the location they are applied and will not populate elsewhere.

5.1 Button Navigation

Implementation of five navigational buttons have been added to the Surveillance Plan Landing Page to assist users in moving more easily within a Plan. These buttons consist of:

- **Edit KTR Details:** This button navigates the user to an editable display of the KTR Details page (the “Create a DCMA Multi-Functional Surveillance Plan” page). Record locking rules apply.
- **KCR Table:** This button navigates the user to the Key Contract Requirement Table of the Plan the user is working in.
- **Records:** This button navigates the user to the Surveillance Plan Records Page for the Plan they are working in. The default view of the Records Page displays that of the returned Surveillance Plan’s associated KCRs.
- **Scheduler:** This button navigates the user to the Surveillance Plan Scheduler. When this button is used, the Scheduler’s default will automatically fill and display the Primary CAGE of the Plan along with the User’s ID and Team Code as pulled from their profile.
- **View KTR Details:** This button opens the KTR Details page as a non-editable view.

5.2 Send Message

Users can generate or send messages to other users regardless of access level. These messages are created via a stock correspondence and may be edited or added to if necessary.

5.2.1 Accessing the “Send Message” Page

Located on the selected Plan’s Landing Page is the “Message Type” drop-down. To access the “Send Message” page, select from the “Message Type” drop-down and click on the “Send Message” button. After doing so, the Send Message page will automatically open immediately following the page refresh. A view of the Send Message page may be seen in **Figure 5.2**.

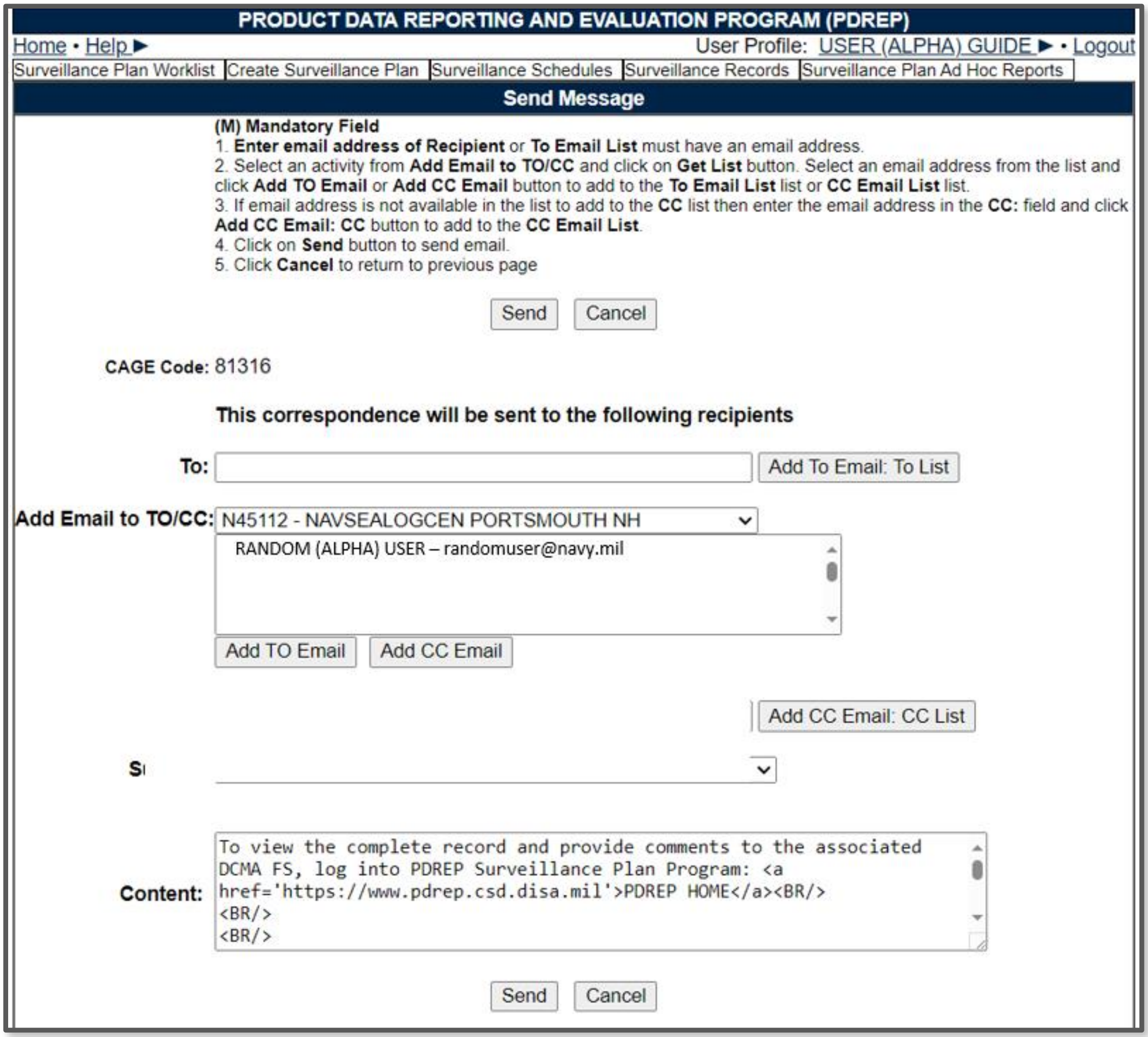


Figure 5.2

5.2.2 Creating a Correspondence

To initiate a correspondence, locate the "Message Type" drop-down on the Plan's Landing Page (**Figure 5.3**) and select from the two available message types.

- **General Message:** Utilized to formally request another user to comment on the Plan selected and correspondence generated from.
- **Message to Supervisor:** Utilized to formally request supervisors to comment on the Plan selected and correspondence generated from.

Immediately after a selection is made from the drop-down, the "Send Message" button will be enabled and no longer grayed out as shown in **Figure 5.3**. Click the "Send Message" button to initiates the creation of the correspondence and open the "Send Message" page.

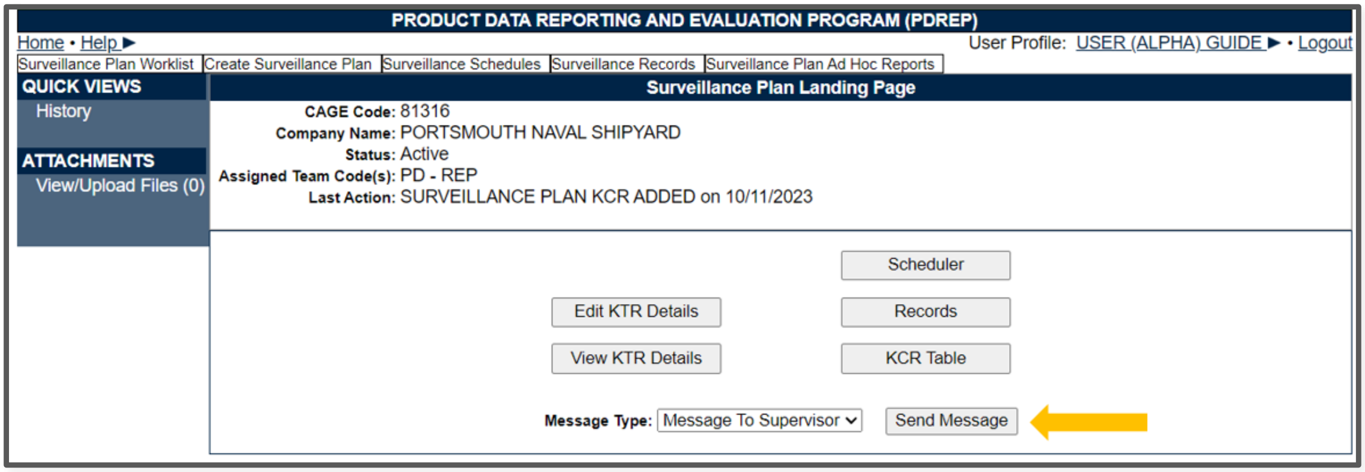


Figure 5.3

After the automatic page refresh (initiated by the "Send Message" button) is finished, the Send Message page will display as seen in **Figure 5.4**. Page instructions are listed at the top of the page with two functional buttons (Save & Cancel) located below.

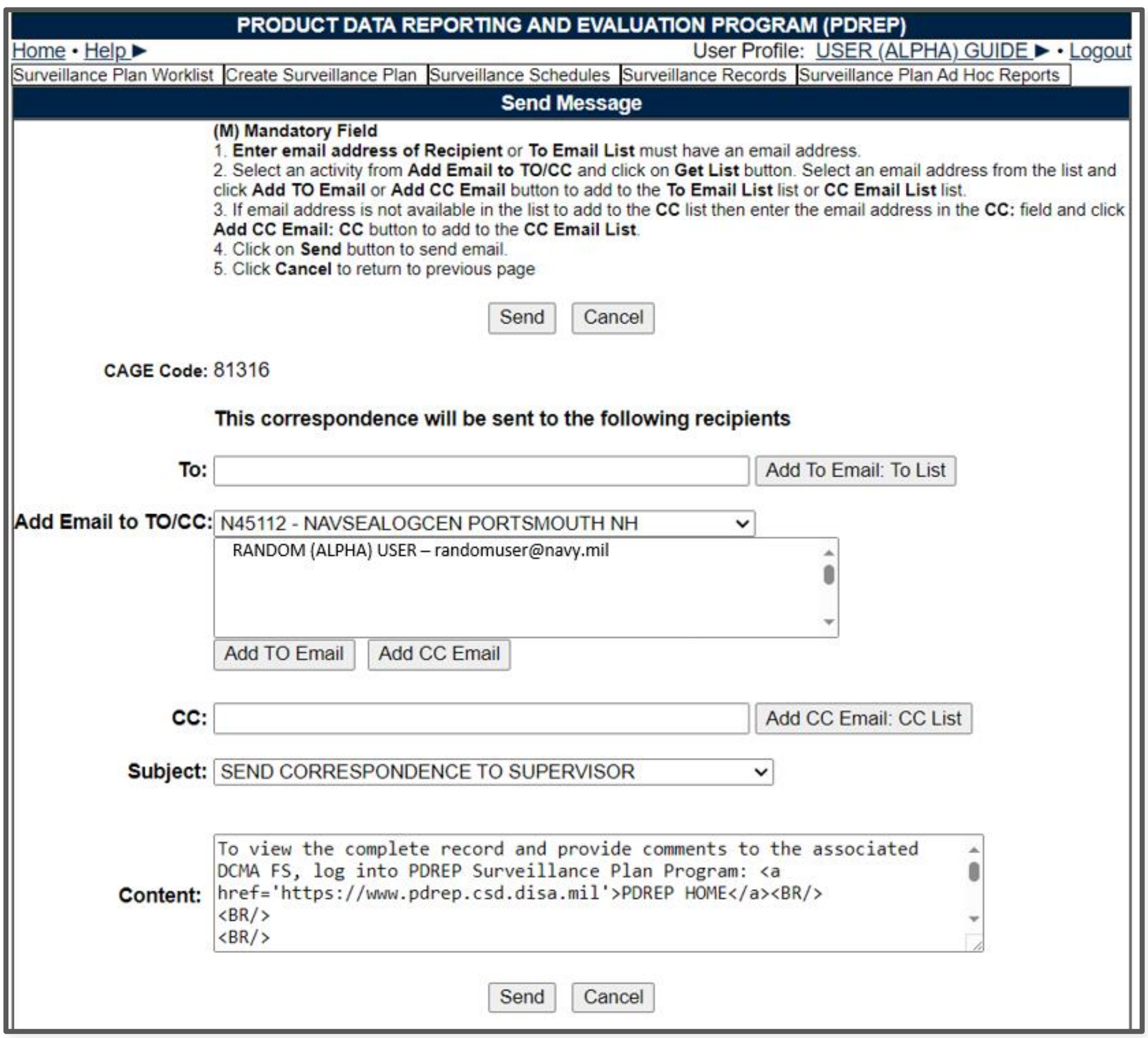


Figure 5.4

5.2.2.1 Recipients

Recipients can be applied to the list box for “TO Email List” one of two ways.

- Manual entry of the recipient’s email address into the “To” field.
- Selecting a recipient’s email from the “Add Email to TO/CC” scroll box.

Once a recipient’s email address is hard typed into the “To:” data field, click the “Add To Email: To List” button. This action applies the intended email address to the “To Email List:” box.

If the “Add To Email: To List” button is clicked without a recipient’s email entered, an error message will display as shown in **Figure 5.5**.

Figure 5.5

When selecting users from the “Add Email to TO/CC:” provided list box, the default will display a list of email addresses to select from, all of whom share the same Primary DoDAAC as the user creating the correspondence. Click the “Add TO Email” button to apply the selected email to the “TO Email List” box. An example of this can be seen in **Figure 5.6**.

Note: *Use the data fields and buttons labeled “CC” to apply CC users. CCing users utilizes the same process as applying the recipient(s) described above.*

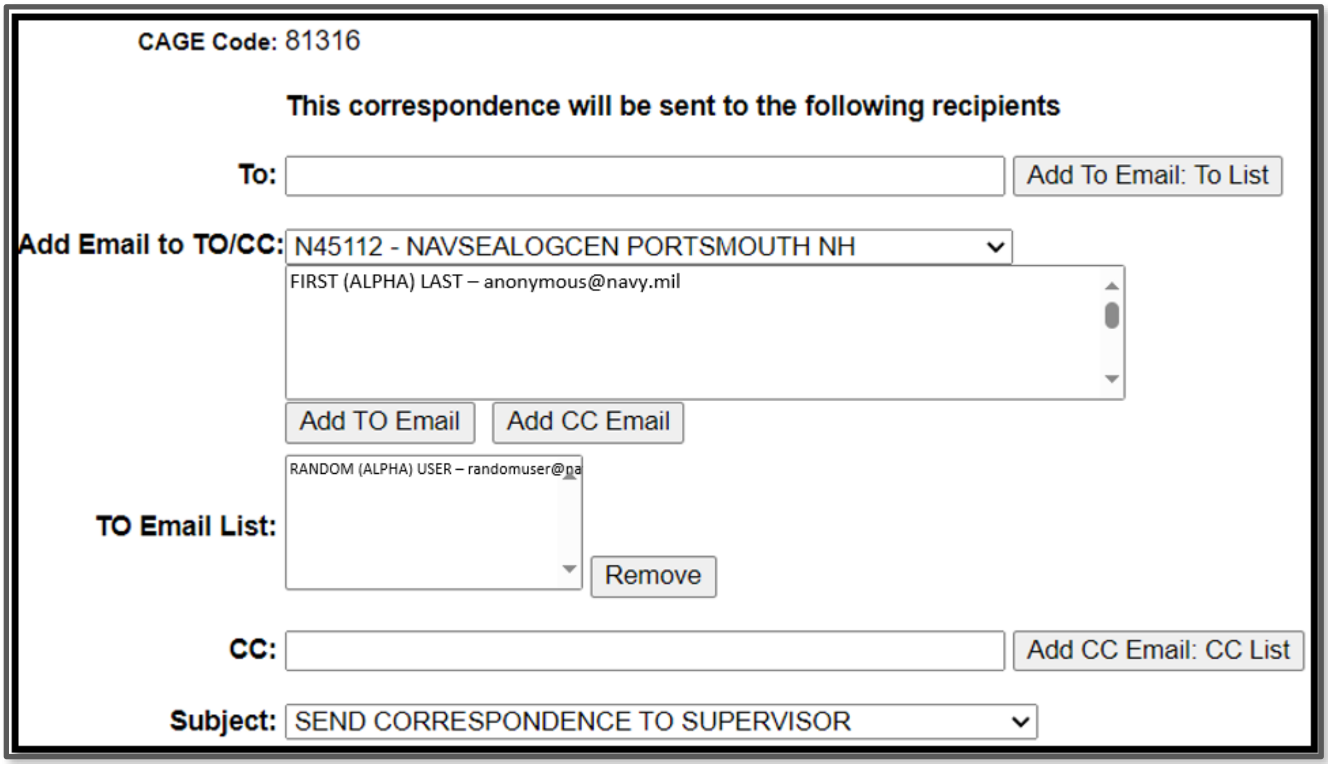


Figure 5.6

5.2.2.2 Subject

The subject line automatically populates based on the Message Type selected. The subject may be changed by using the drop-down and making a new selection.

5.2.2.3 Message

Regardless of the selected type, the body of the stock correspondence is the same for both the General Message and Send Correspondence to Supervisor (**Figure 5.7**).

Note: *DO NOT include any Controlled Unclassified Information (or higher classification level) as these emails will not be encrypted.*

Subject type will be notated on the History Page. Once the message has been composed, click the "Send" button to send the correspondence (via email) to the indicated users.

To leave the screen without sending a message, click the "Cancel" button.

Note: *There may be some unfamiliar text displayed within the content box. This text, such as
 as seen in* ***Figure 5.10****, is needed Code for placement and spacing of the stock message and will not display in the email when sent. An example of a successfully sent correspondence may be seen in* ***Figure 5.7****.*


Tue 5/16/2023 1:02 PM
user.pdrep@mail.mil
[B] SEND CORRESPONDENCE TO SUPERVISOR for Surveillance Plan#: 81316 (PORTSMOUTH NAVAL SHIPYARD)

To view the complete record and provide comments to the associated DCMA FS, log into PDREP Surveillance Plan Program: PDREP HOME

Comments should be provided to the FS identified in the Surveillance Plan record.

Sent By: PDREP USER

Sender's Email: user.pdrep@mail.mil

Correspondence Type: SEND CORRESPONDENCE TO SUPERVISOR

Figure 5.7

Associated Data Fields for **Figure 5.7**

- **Add Email to TO/CC:** This list box defaults to available recipients who share the same Primary DoDAAC as the user generating the correspondence.
- **CAGE Code:** The CAGE Code of the contractor to whom the Surveillance Plan is attributed.
- **CC:** This field is used to send a copy of the email to the recipient(s) identified as CC. Recipient’s email address may be entered in this data field by the user. Use the “Add Email to TO/CC” button to apply the email entered to the “CC Email List” box.
- **CC: Email List:** This hidden box populates only after a user has been applied using the “Add CC Email: CC List” button or the “Add CC Email” button. List boxes is hidden when no recipients are attached.
- **Content:** The communication sent to the intended recipient.
- **Subject:** Describes/references what the email is about.
- **To:** Recipient’s email address may be entered in this data field by the user. Use the “Add Email to TO/CC:” button to apply the email entered to the “To Email List” box. Additional recipients may be added by typing their email address in the “To” box and then clicking the “Add To Email list” button.
- **To Email list:** This hidden box populates only after a user has been applied through the use of the “Add To Email: To List” button or the “Add TO Email” button. List boxes is hidden when no recipients are attached.

Associated Button Functionality for **Figure 5.7**

- **Add CC Email:** Applies the hard typed email address to the email list of recipients intended to receive a copy of the correspondence.
- **Add CC Email: CC List:** Applies the selected email address to the email list of recipients intended to receive a copy of the correspondence.
- **Add TO Email:** Applies the selected email address to the email list of intended recipients.
- **Add To Email: To List:** Applies the hard typed email address to the email list of intended recipients.
- **Cancel:** This button navigates back to the Landing Page of the Surveillance Plan being worked.
- **Send:** This button initiates the sharing of the correspondence with that of the intended recipient(s). If this button is used without a recipient applied, an error message will display notifying the user to list the intended recipients' email (**Figure 5.8**).

Figure 5.8

When the "Send" button is used successfully, the message generated is sent to those recipients that have been applied to one of the email list boxes. An example of the confirmation page that displays when a message was successfully sent can be seen in **Figure 5.9**.

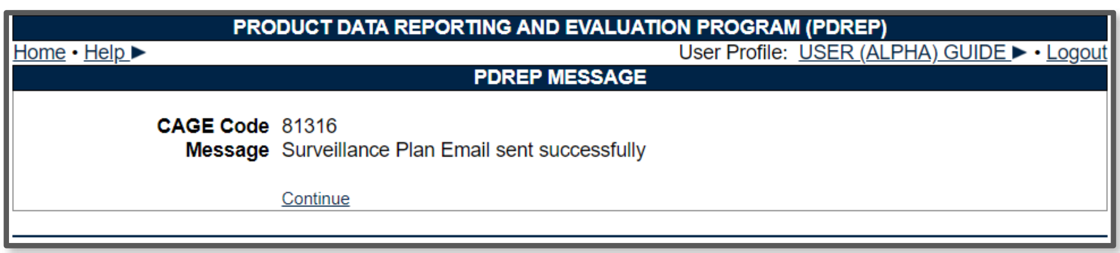


Figure 5.9

Lastly, a record of the correspondence is added to the History Page (**Figure 5.10**).

10/11/2023	N45112	USER (ALPHA) GUIDE	N45112	USER (ALPHA) GUIDE	SEND CORRESPONDENCE TO SUPERVISOR	MESSAGE: TO VIEW THE COMPLETE RECORD AND PROVIDE COMMENTS TO THE ASSOCIATED DCMA FS, LOG INTO PDREP SURVEILLANCE PLAN PROGRAM: <A HREF='HTTPS://WWW.PDREP.CSD.DISA.MIL'>PDREP HOME</A> COMMENTS SHOULD BE PROVIDED TO THE FS IDENTIFIED IN THE SURVEILLANCE PLAN RECORD. SENT BY: USER (ALPHA) GUIDE SENDER'S EMAIL: RANDOMEMAIL@NAVY.MIL CORRESPONDENCE TYPE: SEND CORRESPONDENCE TO SUPERVISOR SENT TO: RANDOMEMAIL@NAVY.MIL

Figure 5.10

5.3 SP History

Accessed via the link on the Surveillance Plan's Landing Page, the History page provides an account of certain actions taken. Currently, these actions are exclusive to the Plan and KCR, but events related to SP Records and the Scheduler are anticipated for a future release. The History Page captures the following actions:

- Create New Surveillance Plan
- KCRs – Added, Edited & Completed
- Record Activation
- Record Archiving
- Record Re-Opening
- Requesting Review
- Surveillance Plan Contract – Adding, Archiving and Unarchiving
- Surveillance Plan End Items - Adding, Archiving, Unarchiving and Removing
- Surveillance Plan Programs - Adding, Archiving and Unarchiving
- Surveillance Plan Saved

The History page will also provide an account of when changes occur to the following data fields:

- Allocated Hours
- Applicable Contract(s)
- Applicable KCR Sub Location(s)
- Applicable Programs
- Assigned Functional Specialist
- End Date
- Frequency of Surveillance
- Intensity of Surveillance
- KTR Sub Location
- Rational for Consequence

- Rational for Likelihood
- Risk Consequence
- Risk Likelihood
- Risk Rating
- Start Date
- Surveillance Category
- Surveillance Complete
- Surveillance Warranted
- Surveillance Warranted Reason
- Unallocated Hours
- Will KCR be delegated

The History Page opens to a default view of general information. The "Points of Contact Info for Surveillance Plan" indicating the Plans CAGE Code, followed by contact information for the QAR who initiated the Plan, and finally the "History for Surveillance Plan" displays the SP Number broken up by CAGE Code – Year Created – Number of Plan's.

Note: *Previous builds allowed for Plan revisions whereas the Number of Plans could be greater than one. This capability was eliminated as of September 2021. Though the SP Number continues to display this number, the number should never exceed one. If it does, please contact the PDREP help desk.*

Beneath the general information area is a seven-column display of the Plan's History. In most cases, the "To Activity" and "POC" columns will not be utilized as they refer to a recipient of a correspondence. This is particularly relevant when requesting a review of the Surveillance Plan. An example is shown in **Figure 5.11**. Events are displayed in chronological order with the first action (Plan creation) displaying as the first line item. Proceeding actions are saved below.

Note: *The History Page is a free-standing window that allows users to continue working within the Plan without closing the pane.*

Date Released	From Activity	From POC	To Activity	POC	Correspondence	Message
01/06/2021	S0101A	DCMA (BETA) TEST USER			CREATE NEW SURVEILLANCE PLAN	
03/26/2021	S0101A	DCMA (BETA) TEST USER			SURVEILLANCE PLAN SAVED	
03/26/2021	S0101A	DCMA (BETA) TEST USER			SURVEILLANCE PLAN KCR ADDED	KCR-QA-0001 - CRITICAL ITEM
03/26/2021	S0101A	DCMA (BETA) TEST USER	[DoDAAC]	[Name of Recipient]	SURVEILLANCE PLAN FLS REVIEW REQUESTED	
03/26/2021	S0101A	DCMA (BETA) TEST USER			SURVEILLANCE PLAN ACTIVATED	
03/26/2021	S0101A	DCMA (BETA) TEST USER	[DoDAAC]	[Name of Recipient]	SURVEILLANCE PLAN TRANSFERRED	

Figure 5.11

Associated Data Fields for **Figure 5.11**

- **Correspondence:** Type of action associated with the History line item.
- **Date Released:** Date the action occurred.
- **From Activity:** DoDAAC of the user who initiated the action/sent the correspondence.
- **From POC:** User who initiated the action/sent the correspondence.
- **Message:** Relevant details pertaining to the action or notification.
- **POC:** User receiving the correspondence.
- **To Activity:** DoDAAC of the user receiving the correspondence.

5.4 Attachments

Navigation to the attachments page starts by clicking the “View/Upload Files” hyperlink shown in **Figure 5.12**. After the page refresh, the ability to add, view or remove related documents will be available for users with Functional Specialist (or higher) access.

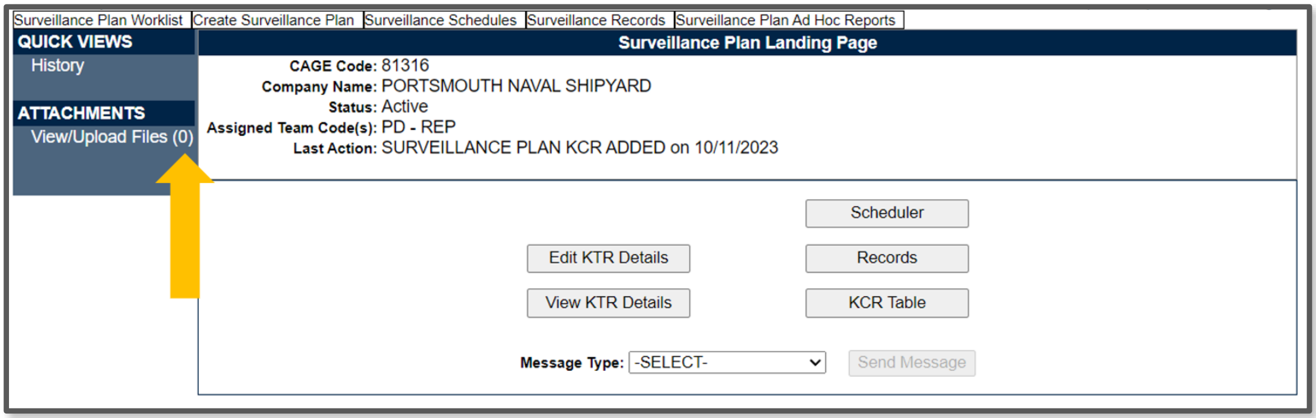


Figure 5.12

- **View/Upload Files (#):** This hyperlink opens to the “Upload Attachment(s)” page (default view shown in **Figure 5.13**) and allows users to upload, view and delete attachments related to that of the Plan being worked. The number exhibited in parentheses indicates the number of attachments associated with the Plan. This number does not take into consideration attachments made to any Records or Child Records (IDRs). This means applied documents are exclusive to the location they are applied and will not populate elsewhere.

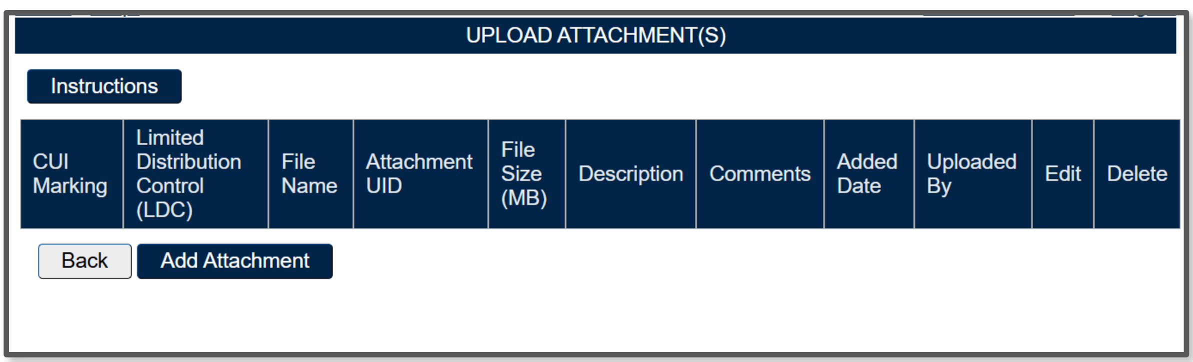


Figure 5.13

***Note**: Each Plan, Record and subsequently the associated IDR’s have their own designated space for attachments. This means applied documents are exclusive to the location (level) they are applied and will not populate elsewhere. For further instructions, please see the user guide on <u>Attaching a File in PDREP</u>, found on the PDREP website under “References” and housed within “Guides and Manuals”.*

6 ACCESSING SP RECORDS

On the PDREP Home Page, select “Surveillance Records” from the “Surveillance Plan (SP)” fly-out (**Figure 6.1**).

Figure 6.1

The default page of Surveillance Records will generate. This view does not prepopulate any information and requires a Primary CAGE be entered. Select the “Display KCRs” button to access the Plan’s associated Record Page (**Figure 6.2**).

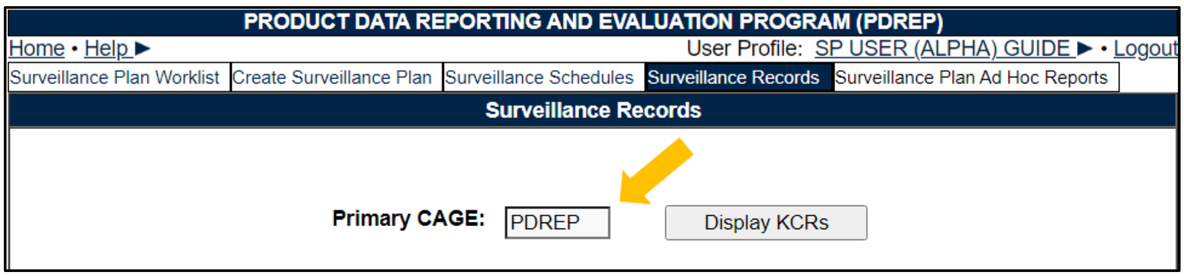


Figure 6.2

When a CAGE Code has been entered without an existing Surveillance Plan, a notification will display instructing the user a Plan does not exist. An example of this display may be seen in **Figure 6.3**.

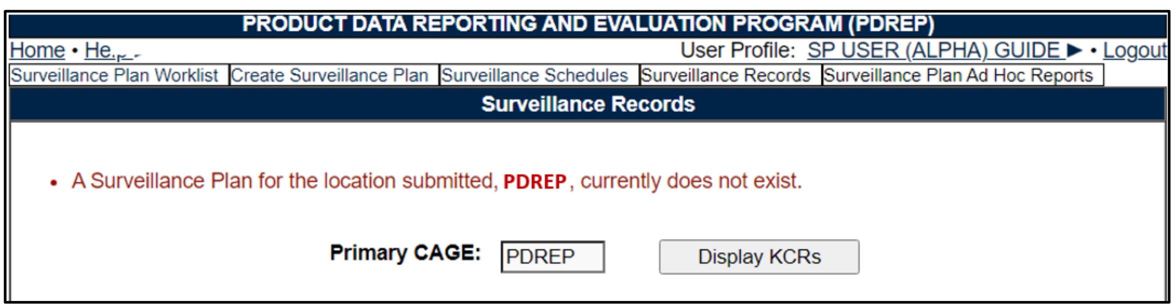


Figure 6.3

For those instances where a Surveillance Plan has been created but does not have at least one KCR associated to it, the tools’ navigational buttons will display (after selecting the “Display KCRs” buttons) with a notification instructing the user to add KCRs via the Worklist. An example of this display may be seen in **Figure 6.4**.

Figure 6.4

If already working in the application and within a specific Plan, select the “Surveillance Records” tab at the top of the page, or use the navigational button labeled “Records” to access the associated Plan’s Record Page along with the related worklist (**Figure 6.5**).

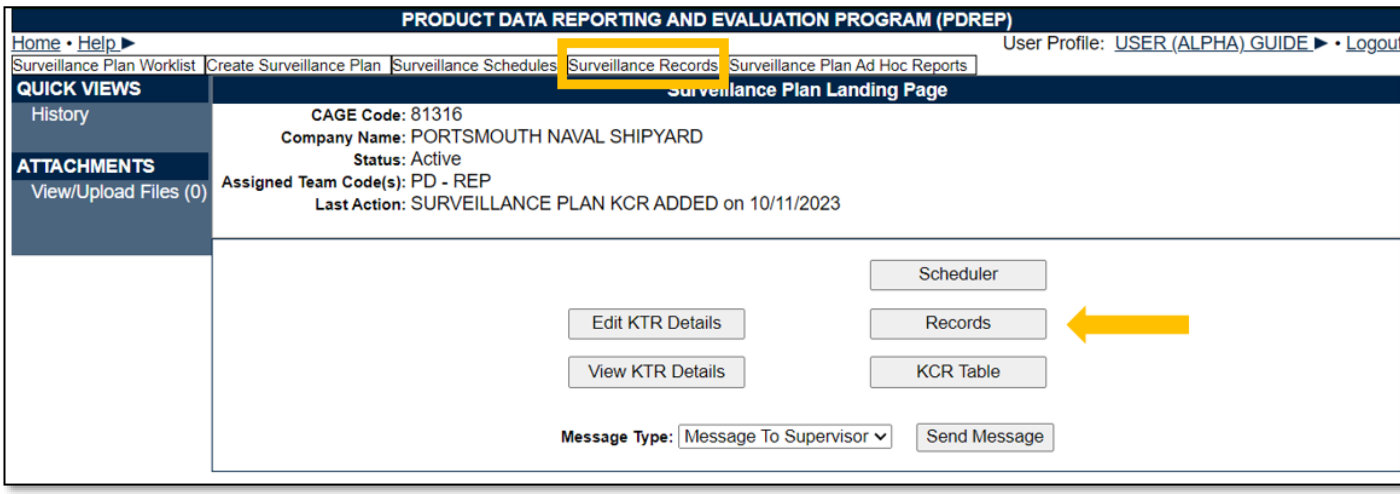


Figure 6.5

6.1 SP Records Page

After accessing the Records Page (via navigational buttons or entering the Primary CAGE Code into the data field and selecting the “Display KCRs” button), there will be four to five sections that make up the SP Records Page display.

1. Associated KCR Table
2. Associated Records
3. Filtering KCRs
4. Key Contract Requirements View
5. Recently Accessed Records *(not always displayed)*

6.1.1 Recently Accessed Records

Populating at the top of the page directly under the navigational buttons are the Recently Accessed Records of the Plan being worked (see **Figure 6.6**). The Associated Records table displays the associated Records that have had an action taken (save, complete, reopen or reassign) within the last 72 hours, regardless of the user who took the action.

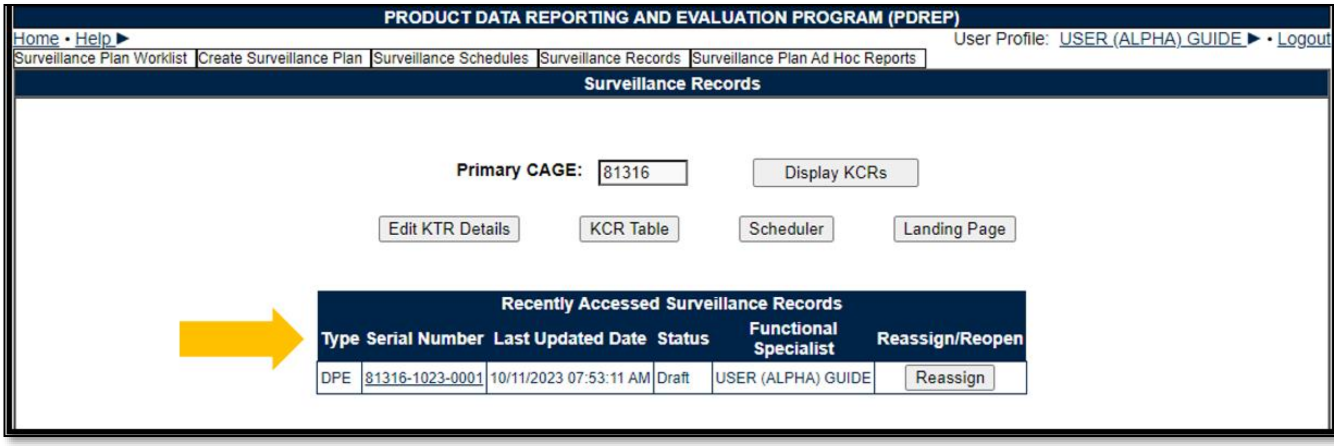


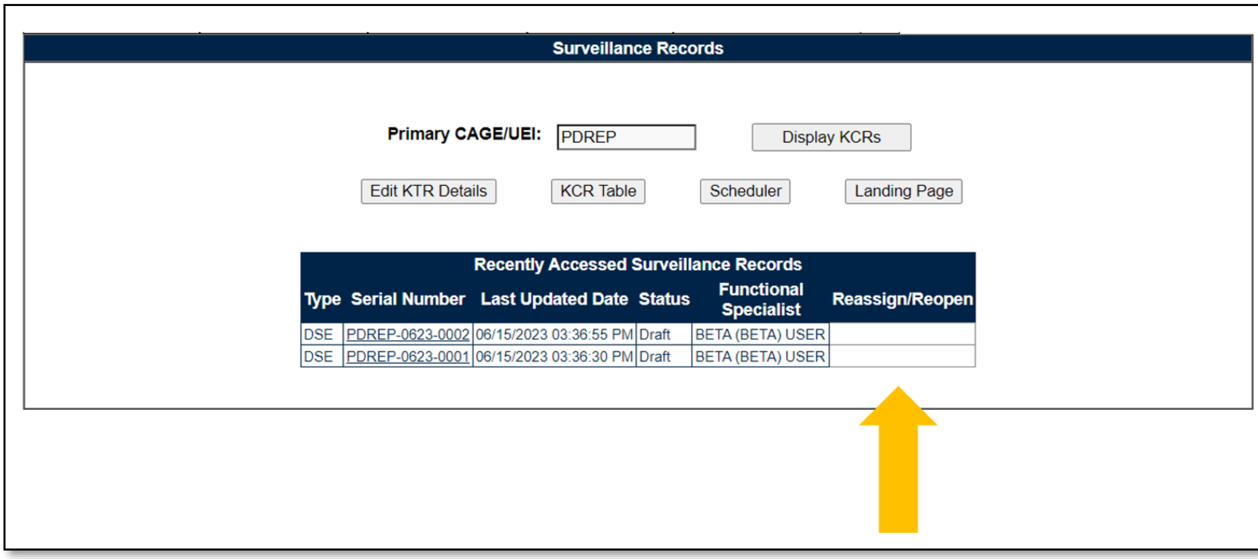
Figure 6.6

Associated Data Fields for **Figure 6.6**

- **Functional Specialist:** Assigned FS responsible for the Record (also known as the Record Owner).
- **Last Updated Date:** The date the Record was last updated based on the “Save” action.
- **Serial Number:** Also known as the Record UID, this is the unique identifier of the Record. The Serial Number displays as the Plans 5-digit CAGE Code, 2-digit month & 2-digit year, ending with a 4-digit sequential creation number (CAGE – MMYY - ####).
- **Status:** The present status *(Draft/Complete)* of the Record.
- **Type:** Type of surveillance evaluation associated with the KCR (DPE, DSE, PE, SPE).

Associated Hyperlink & Button Functionality for **Figure 6.6**

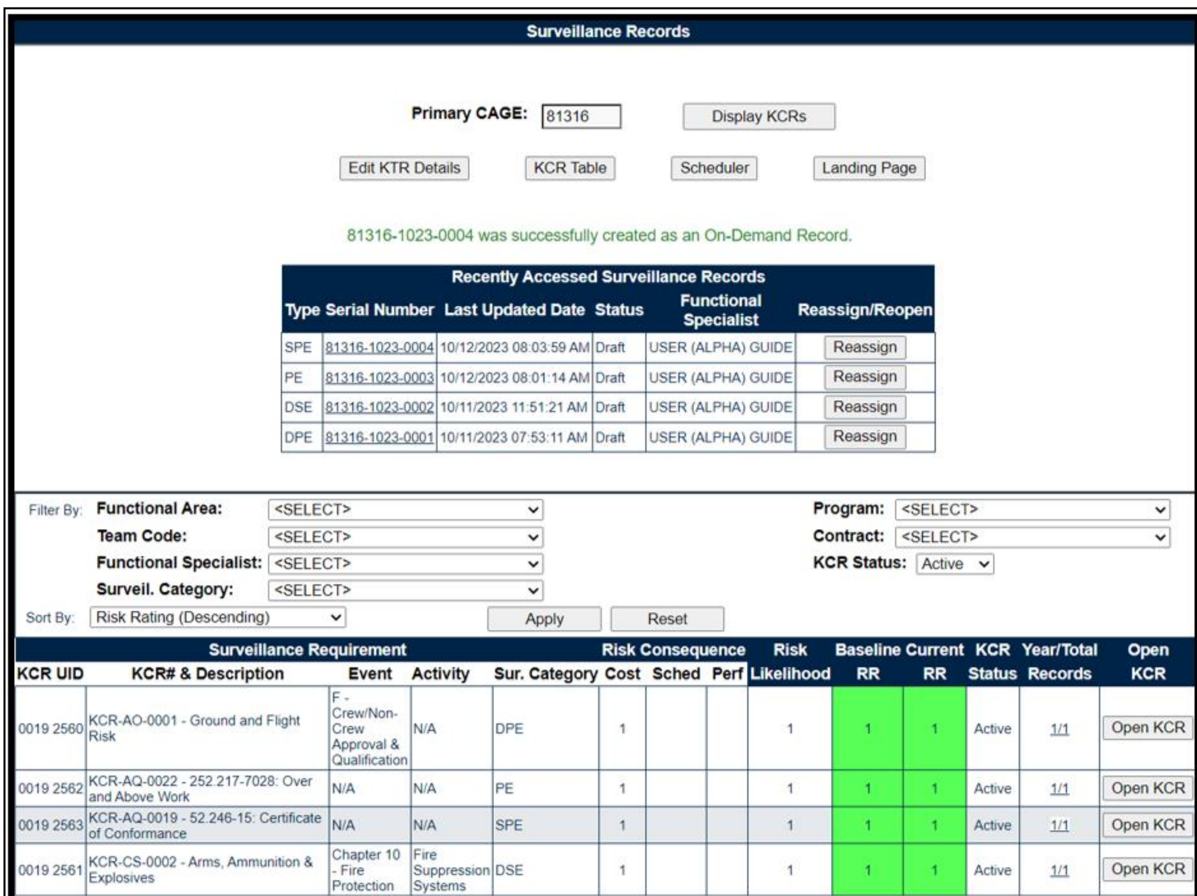
- **Display KCRs:** Displays the KCRs for the Primary CAGE listed in the data field.
- **Edit KTR Details:** Navigates the user to an editable display of the KTR Details page (the “Create a DCMA Multi-Functional Surveillance Plan” page). Record locking rules apply.
- **KCR Table:** Navigates the user to the Key Contract Requirement table of the Plan the user is working in.
- **Landing Page:** This button navigates back to the Landing Page of the Surveillance Plan being worked.
- **Reassign/Reopen:** The Reassign/Reopen column displays either one button or the other depending on the Record status. The “Reassign” button populates when the Record is in a draft status, while “Reopen” displays for completed Records. This column only populates for users with Supervisor or higher access and button functionality enabled within the same Team. **Figure 6.7** shows an example of what the display would look like when the user has the proper access level but a different Team Code than the Record Owner.
- **Scheduler:** Navigates the user to the Surveillance Plan Scheduler. When this button is used, the Scheduler’s default will automatically fill and display the Primary CAGE of the Plan the user is working in along with the User’s ID and Team Code associated with their profile.
- **Serial Number:** Also known as the Record UID, this is the unique identifier of the Record. When selected, this hyperlink will open the Record to the appropriate display per the user selecting it (draft for the Record Owner/view for all other users).



Type	Serial Number	Last Updated Date	Status	Functional Specialist	Reassign/Reopen
DSE	PDREP-0623-0002	06/15/2023 03:36:55 PM	Draft	BETA (BETA) USER	
DSE	PDREP-0623-0001	06/15/2023 03:36:30 PM	Draft	BETA (BETA) USER	

Figure 6.7

The Recently Accessed Records table will be hidden after 72 hours of inactivity. An example of this may be seen in **Figure 6.8**. It will immediately reengage when a completed action has been made on an associated Record of the Plan.



Type	Serial Number	Last Updated Date	Status	Functional Specialist	Reassign/Reopen
SPE	81316-1023-0004	10/12/2023 08:03:59 AM	Draft	USER (ALPHA) GUIDE	Reassign
PE	81316-1023-0003	10/12/2023 08:01:14 AM	Draft	USER (ALPHA) GUIDE	Reassign
DSE	81316-1023-0002	10/11/2023 11:51:21 AM	Draft	USER (ALPHA) GUIDE	Reassign
DPE	81316-1023-0001	10/11/2023 07:53:11 AM	Draft	USER (ALPHA) GUIDE	Reassign

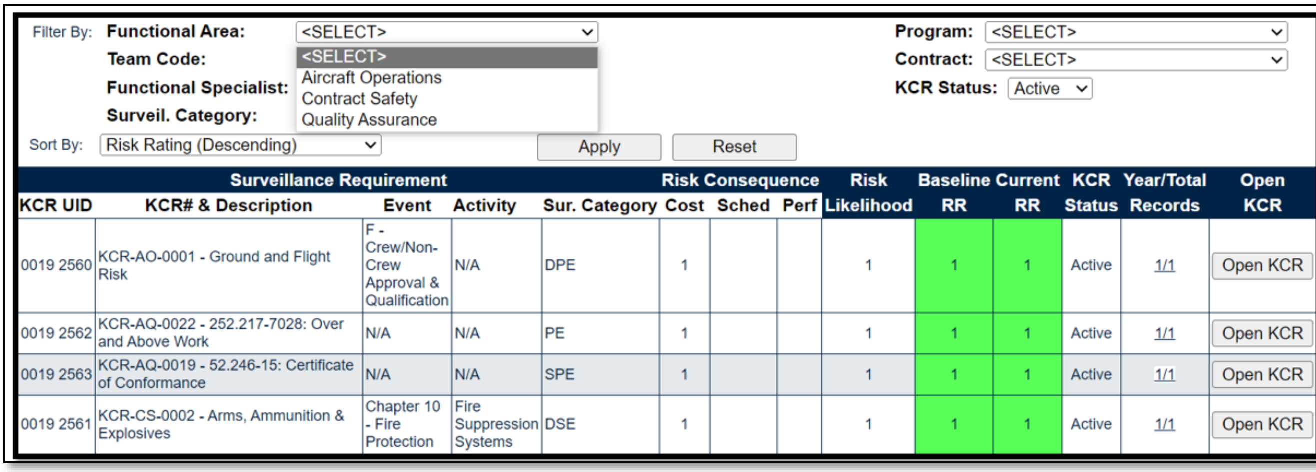
Surveillance Requirement					Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open
KCR UID	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0019 2560	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Approval & Qualification	N/A	DPE	1			1	1	1	Active	1/1	Open KCR
0019 2562	KCR-AQ-0022 - 252.217-7028: Over and Above Work	N/A	N/A	PE	1			1	1	1	Active	1/1	Open KCR
0019 2563	KCR-AQ-0019 - 52.246-15: Certificate of Conformance	N/A	N/A	SPE	1			1	1	1	Active	1/1	Open KCR
0019 2561	KCR-CS-0002 - Arms, Ammunition & Explosives	Chapter 10 - Fire Protection	Fire Suppression Systems	DSE	1			1	1	1	Active	1/1	Open KCR

Figure 6.8

6.1.2 Filtering KCRs

Beneath the Recently Accessed Records Table or the Plan’s navigational buttons (when the table is not available), are the filter & sort features that can affect the number of displayed KCRs within the associated KCR table. In all cases, options are limited to those values saved within a KCR.

*For example: The four KCRs displayed in the sample Plan on **Figure 6.9** fall within three functional areas (AO, CS & QA). Because of this, the” Filter By” for Functional Area will only generate those two values (Aircraft Operations, Contract Safety & Quality Assurance) in the dropdown.*



Surveillance Requirement					Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open
KCR UID	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0019 2560	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Approval & Qualification	N/A	DPE	1			1	1	1	Active	1/1	Open KCR
0019 2562	KCR-AQ-0022 - 252.217-7028: Over and Above Work	N/A	N/A	PE	1			1	1	1	Active	1/1	Open KCR
0019 2563	KCR-AQ-0019 - 52.246-15: Certificate of Conformance	N/A	N/A	SPE	1			1	1	1	Active	1/1	Open KCR
0019 2561	KCR-CS-0002 - Arms, Ammunition & Explosives	Chapter 10 - Fire Protection	Fire Suppression Systems	DSE	1			1	1	1	Active	1/1	Open KCR

Figure 6.9

By default, the associated KCR table will only show the Plan’s “Active” KCRs. Select one or more values from the “Filter By:” and/or “Sort By:” options and click the “Apply” button to generate those associated KCRs matching the criteria used to sort/filter. Using the filters should reduce the items within the table. Click the “Reset” button to remove filter(s) and sort(s) used.

Associated Filtering for **Figure 6.9**

- **Contract:** Filters KCRs in the table by Applicable Contract.
- **Functional Area:** Filters the table by KCR Functional Area.
- **Functional Specialist:** Filters the table by Assigned Functional Specialist within the KCR.
- **KCR Status:** Filter KCRs in the table by the KCR’s status. Dropdown defaults to “Active”. Other options include “Inactive” and “Any”.
- **Program:** Filters KCRs in the table by Applicable Program.
- **Surveil. Category:** Type of surveillance evaluation (DPE, DSE, PE, SPE) identified within the KCR.
- **Team Code:** Filters the table by Team Code of the KCR’s Assigned Functional Specialists.

Associated Sorting for **Figure 6.9**

- **Sort By:** Allows for sorting the table by different options that arranges the list of KCRs based on the selected sorting method.
  - End Date (Ascending)
  - End Date (Descending)

- KCR UID (Ascending)
- KCR UID (Descending)
- KCR# & Description (Ascending)
- KCR# & Description (Descending)
- Risk Likelihood (Ascending)
- Risk Likelihood (Descending)
- Risk Rating (Ascending)
- Risk Rating (Descending) – *default status*
- Start Date (Ascending)
- Start Date (Descending)

Associated Button Functionality for **Figure 6.9**

- **Apply:** Will further filter the KCR Worklist based on the additional filters entered
- **Reset:** Returns selections made to Filter & Sort back to their default status.

6.1.3 Associated KCR Table

The Plans Associated KCRs are in a table beneath the area in which Associated KCRs are filtered. The tables' 14 column display will default to "Active" KCRs but may accommodate views of "Inactive" KCRs or "Any" KCRs with proper filtering.

Surveillance Requirement					Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open
KCR UID	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0019 2560	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Approval & Qualification	N/A	DPE	1			1	1	1	Active	1/1	Open KCR
0019 2562	KCR-AQ-0022 - 252.217-7028: Over and Above Work	N/A	N/A	PE	1			1	1	1	Active	1/1	Open KCR
0019 2563	KCR-AQ-0019 - 52.246-15: Certificate of Conformance	N/A	N/A	SPE	1			1	1	1	Active	1/1	Open KCR
0019 2561	KCR-CS-0002 - Arms, Ammunition & Explosives	Chapter 10 - Fire Protection	Fire Suppression Systems	DSE	1			1	1	1	Active	1/1	Open KCR

Figure 6.10

Associated Data Fields for **Figure 6.10**

- **Activity:** The Activity associated with the KCR. Field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **Baseline Risk Rating:** The initial Risk Rating calculated for the KCR. This number is displayed with a red, yellow, or green colored box based on the 5x5 Risk Matrix (see **Appendix 2**). Both the number and associated risk color will never change.
- **Cost:** The number associated with the Cost Consequence of the KCR.
- **Current Risk Rating:** The most present Risk Rating calculated for the KCR. This number is displayed with a red, yellow, or green colored box based on the 5x5 Risk Matrix (see **Appendix 2**). Both the number and associated risk color will display as the KCR's current values indicate and may differ from that of the Baseline Risk Rating.
- **Event:** The Event associated with the KCR. Field will display as "N/A" when lacking a Surveillance Event in the KCR.
- **KCR Status:** The status (*Active/Inactive*) of the KCR.
- **KCR UID:** The 8-digit unique identifier of the KCR.

- **KCR # & Description:** Key Contract Number & Description associated to the Surveillance Plan.
- **Perf:** The number associated with the Performance Consequence of the KCR.
- **Risk Likelihood:** The number associated with the Risk Likelihood of the KCR.
- **Sched:** The number associated with the Schedule Consequence of the KCR.
- **Sur. Category:** Type of surveillance (DPE, DSE, PE, SPE) identified within the KCR's Surveillance Category.

Associated Button & Hyperlink Functionality for **Figure 6.10**

- **Open KCR:** Button that opens the KCR to an editable view when selected. Record locking rules apply.

Note: *When accessing the KCR via the "Open KCR" button, the tools' navigation has been moved from the Records Page to the KCR Table. When the KCR is exited, the user's location will be on the KCR table.*

- **Year/Total Records:** Hyperlinked display of the KCR's associated Records by present year and total count of cumulative Records that opens the KCR's associated Records when clicked. The Records pertaining to the present year, located to the left of the divider, resets automatically back to zero as of January 1st, whereas the total count of cumulative Records, located to the right of the divider, will maintain a continuous count of all associated Records pertaining to the KCR.

*For example: **Figure 6.11** shows KCR-QA-0008 - Inspection Systems display as 4/5. This indicates four Records have been created this year, but the KCR houses a total of five Records.*

Surveillance Requirement				Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open
KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
KCR-QA-0007 - First Article: (1) Government Test (2) Contractor Test	First Article Test (FAT) Government	Documentation	DPE			3	3	13	13	Active	1/1	Open KCR
KCR-QA-0007 - First Article: (1) Government Test (2) Contractor Test	First Article Test (FAT) Contractor	Documentation	DPE			3	3	13	13	Active	0/0	Open KCR
KCR-QA-0008 - Inspection System	Final Inspection	N/A	DPE			3	3	13	13	Active	4/5	Open KCR
KCR-AQ-0074 - Foreign Military Sales (FMS)	(FMS Requirement) OR (8242) OR (FMS COUNTRY/CASE)	N/A	DPE			2	1	6	3	Active	0/0	Open KCR

Figure 6.11

6.1.4 Associated Records

Associated Records have been hidden to help reduce the returned display of the Records Page. By clicking on the "Year/Total Records" hyperlink, the page is prompted to display those hidden Records in a bonus section beneath the Associated KCR Table as shown in **Figure 6.12**. Surveillance Records, also known as the "Records Table", houses the associated Records pertaining to the KCR, regardless of user or Record status. Any user with view access or a higher access may open and look at any Record, but the ability to edit or complete a Record is restricted to that of the Record Owner.

Surveillance Requirement					Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open
KCR UID	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0016 8070	KCR-QA-0010 - Item Unique Identification and Valuation	Fabrication/Procurement	Labeling	DPE	5			5	25	25	Active	3/3	Open KCR
0016 8161	KCR-QA-0022 - Specialty Metals	Other Event User Defined	N/A	DPE	1		5	3	22	22	Active	2/2	Open KCR
0016 8077	KCR-TO-0002 - Transportation Account Code	Documentation	Missing financial transportation information	PE	4			3	18	18	Active	1/1	Open KCR
0016 8072	KCR-QA-A002 - Other Agency Accepted work requirements	Delivery	N/A	SPE	1			1	1	1	Active	5/5	Open KCR

Surveillance Records

Create An On-Demand Record

Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	Reopen	Delete	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)

Figure 6.12

Associated Data Fields for **Figure 6.12**

- **Actual Hours:** Field displaying the hours it took to conduct the surveillance as entered by the Record Owner.
- **Functional Specialist:** Assigned FS responsible for the Record. Also known as the Record Owner.
- **Last Updated Date:** The date the Record was last updated based on the "Save" action.
- **Serial Number:** Also known as the Record UID, this is the unique identifier of the Record. The Serial Number displays as the Plans 5-digit CAGE Code, 2-digit month & 2-digit year, ending with a 4-digit sequential creation number (CAGE – MMYY - ####).
- **Status:** The status *(Draft / Complete)* of the Record.
- **Type:** Record type (DPE, DSE, PE, SPE) as determined by the KCR's Surveillance Category.

Associated Button Functionality for **Figure 6.12**

- **Delete:** The ability to delete is a restricted functionality for those users with Supervisor (or higher) access, that are also on the same Team as the draft Record Owner. This button is grayed out for completed Records or for those Records containing a completed IDR. If a completed Record needs to be deleted, the Record is required to be "Reopened" first.
- **Reassign/Reopen:** The Reassign/Reopen column displays either one button or the other depending on the Record status. The "Reassign" button populates when the Record is in a draft status, while "Reopen" displays for completed Records. This column only populates for users with Supervisor or higher access and button functionality enabled within the same Team.

- **Attachments (#):** This hyperlink opens the “Upload Attachment(s)” page and allows users to upload, view, and delete attachments related to that of the Record being worked. The number exhibited in parentheses indicates the number of attachments associated with the Record. This number does not take into consideration attachments made to the Plan, other Records, or IDRs. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.
- **Serial Number:** Also known as the Record UID, this is the unique identifier of the Record. When selected, this hyperlink will open the Record to the appropriate display per the user selecting it (draft for the Record Owner/view for all other users).

6.1.5 KCR View

A view of the KCR (along with its present entries) may be seen directly following the Surveillance Records Table. An example of this is shown in **Figure 6.13**. These areas are not a part of the page’s default view and can only be accessed by selecting the KCR’s hyperlink for “Year/Total Records”. This action prompts the Records Page to display the hidden sections related to the KCR.

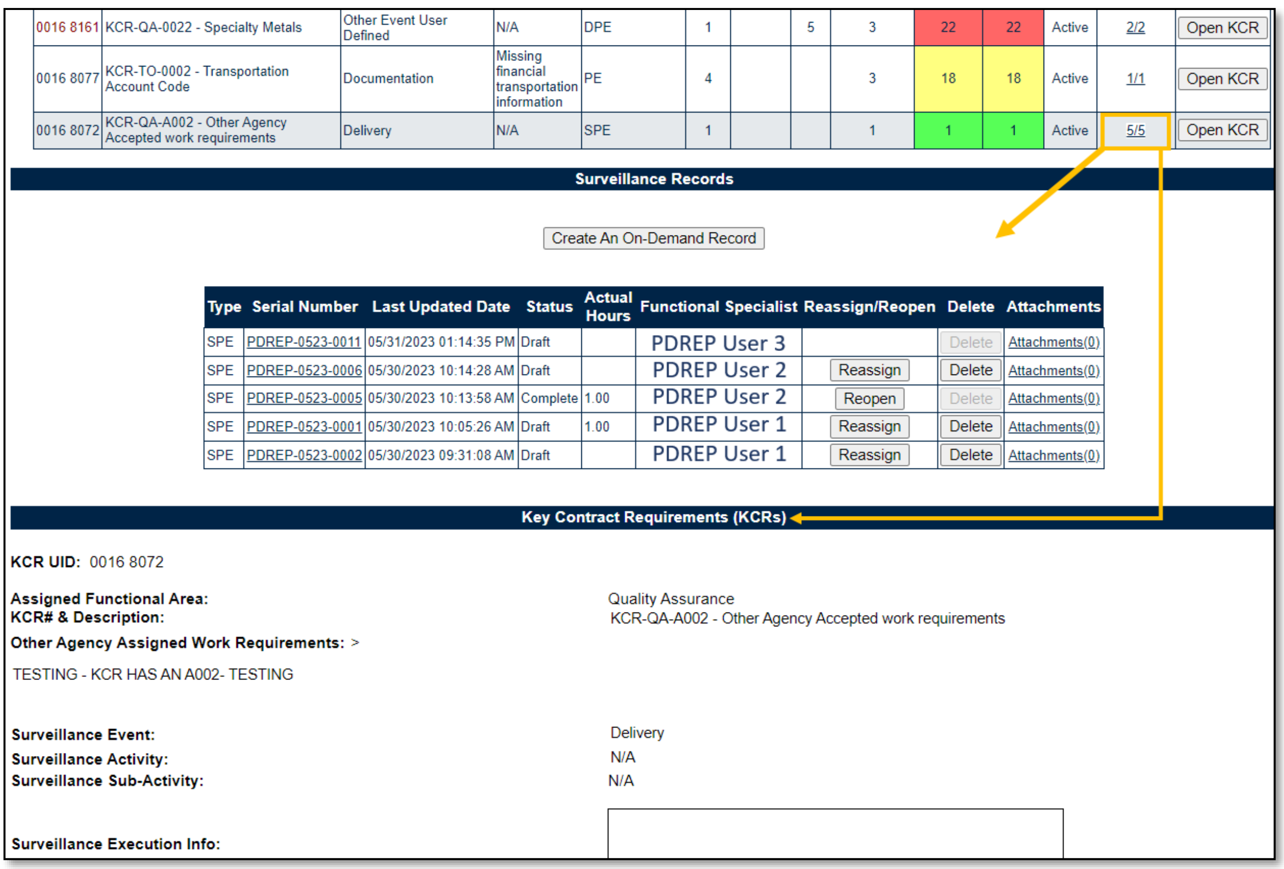


Figure 6.13

6.1.6 Inactive KCRs

If any KCR values for KCR # & Description, Event, Activity or Sub-Activity have been identified as Inactive, the Record will display the Open KCR column in RED with an Edit KCR button as seen in **Figure 6.14**. Additionally, the hyperlink in the Year/Total Records column will be inactive until the KCR is updated with Active KCR values.

Surveil. Category: <SELECT>

Sort By: Risk Rating (Descending) Apply Reset

Surveillance Requirement					Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open
KCR UID	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0019 2397	KCR-QA-0026 - Foreign Delegations or others that can not be tied to other KCRs	N/A	N/A	SPE	5			5	25	25	Active	3/7	Edit KCR
0019 2459	KCR-CS-0003 - Mishap Reporting & Investigation Involving Aircraft Missiles & Space Launch Vehicles (CS)	Mishap Reporting & Investigation Involving Aircraft Missiles & Space Launch Vehicles (CS)	N/A	DPE	4	4	4	4	21	21	Active	0/1	Edit KCR
0019 2436	KCR-CS-0002 - Arms, Ammunition & Explosives	N/A	N/A	SPE	1	1	1	1	13	1	Active	0/4	Edit KCR
0019 2396	KCR-QA-0012 - National Aerospace and Defense Contractors Accreditation Program	N/A	N/A	DPE	1			1	1	1	Active	0/4	Edit KCR
0021 0787	KCR-SB-0004 - 52.219-16: Liquidated Damages - Individual Subcontracting Plan	N/A	N/A	SPE	1			1	1	1	Active	0/5	Edit KCR

Figure 6.14

Clicking the Edit KCR button will open the KCR page and allow the user to update the Inactive KCR values (KCR # & Description, Event, Activity or Sub-Activity), which will be highlighted in Red with a dropdown available below to select an Active KCR value (**Figure 6.15**). Users must have the same DoDAAC as an Assigned FS to edit these fields.

KCR UID: 0019 2396

(M) Assigned Functional Area: Quality Assurance

(M) KCR# & Description: KCR-QA-0012 - National Aerospace and Defense Contractors Accreditation Program

Please select a new KCR# & Description from the list below.

<SELECT>

Surveillance Event: N/A

Surveillance Execution Info:

Figure 6.15

If a sub-activity is inactive and it cannot be replaced with an active option, see your chain of command for further guidance as this was a request of DCMA HQ.

7 Record Creation

A Record may be created one of two ways, either as a Traditional Record or as a Record On-Demand. Most Records will be traditionally created. Traditional Records are established through the populated occurrences of the Scheduler. These Records are easy to create, locate and manage through the entirety of its lifecycle. On-Demand Records are created via the Records Page, are restricted to those users with Supervisor or higher access, and **they do not populate in the Scheduler**. Both Record types restrict editing to the Record Owner. However, either Record type may be Reassigned to another user of the same Team Code, essentially transferring responsibility to a new Record Owner.

7.1 Traditional Record Creation

Traditional Records can only be created in the Scheduler by an assigned FS of the KCR. A draft Record is created by generating a schedule, locating the desired occurrence and selecting the "New" button to access the draft Record (see **Figure 7.1**). Once the draft Record opens, the "Save" button must be used to retain it. If the Record is exited before the "Save" button is used, all contents of the Record will be lost.

Note: *PDREP does not have an auto-save feature, so the tool needs to be told to keep the information. This is done through the save action. If the "Save" button is not used, work will be lost!*

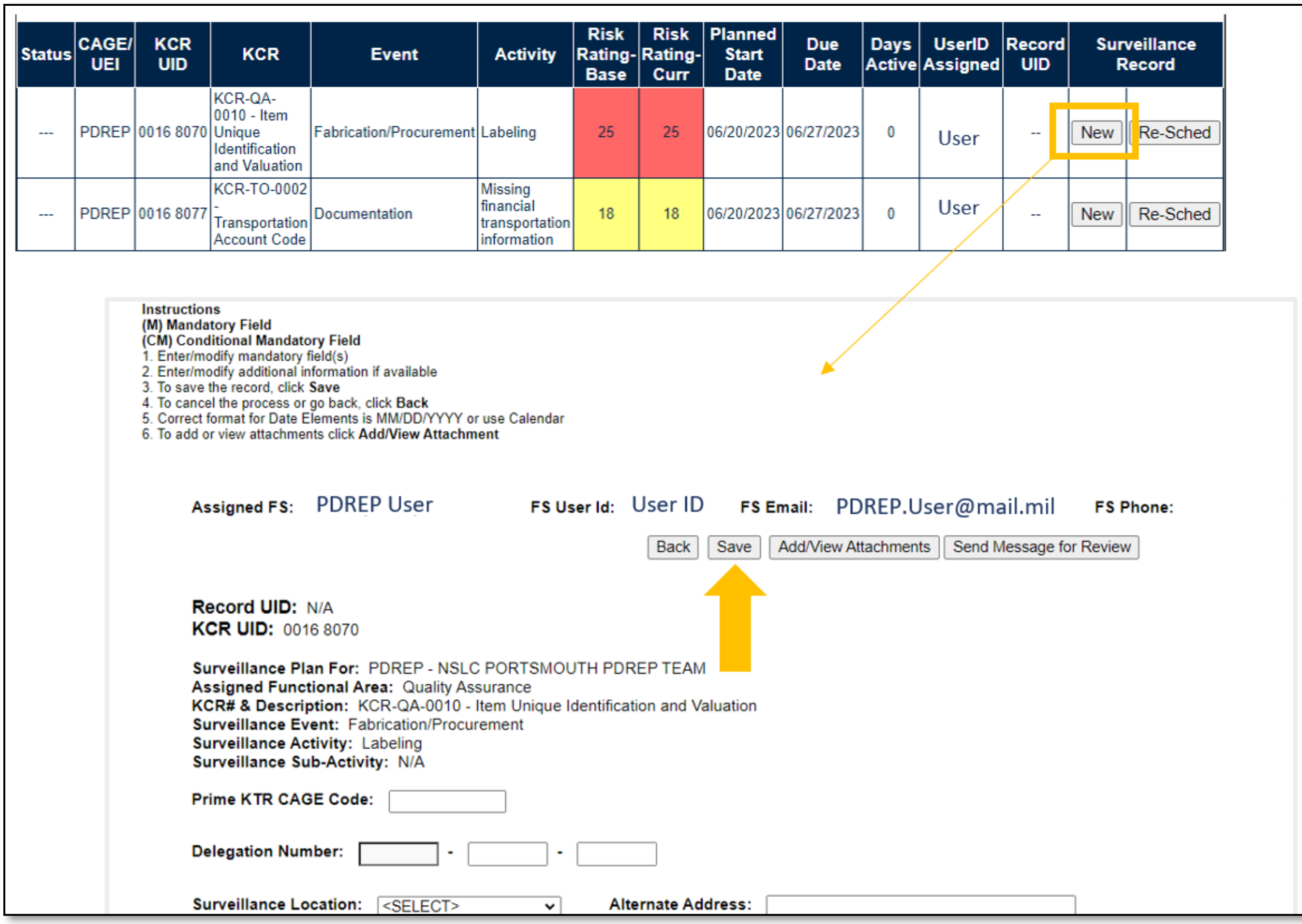


Figure 7.1

7.2 On-Demand Records

On-Demand Records are available to those users with an access level of Supervisor or higher access. They were implemented to create a singular Record for special circumstances outside of anticipated oversights. Though On-Demand Records adhere to the same rules as Traditionally created Records, ***they do not populate in the Scheduler.***

To create an On-Demand Record, start by locating the desired KCR on the Records Page and select the “Year/Total Records” hyperlink to open the Surveillance Records area. The “Create An On-Demand Record” button will display at the top of the Surveillance Records area. Click the “Create An On-Demand Record” button to open the draft creation of the On-Demand Record (see **Figure 7.2**).

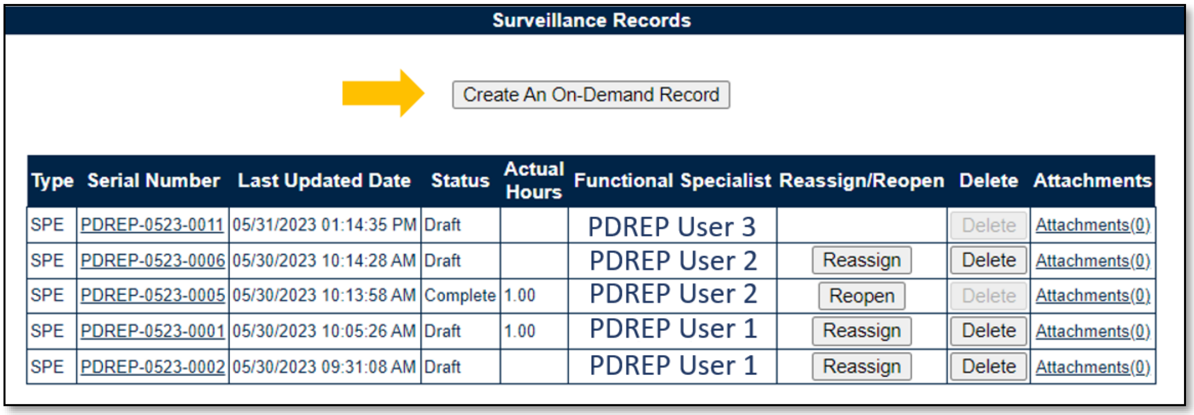


Figure 7.2

The pending On-Demand draft Record will open after the page refresh and requires a FS assignment, Start Date & End Date before the Record becomes a recognized draft Record (**Figure 7.3**). Once the data fields have been satisfied, select the "Reassign" button to capture the information and finalize the process of creating a draft Record.

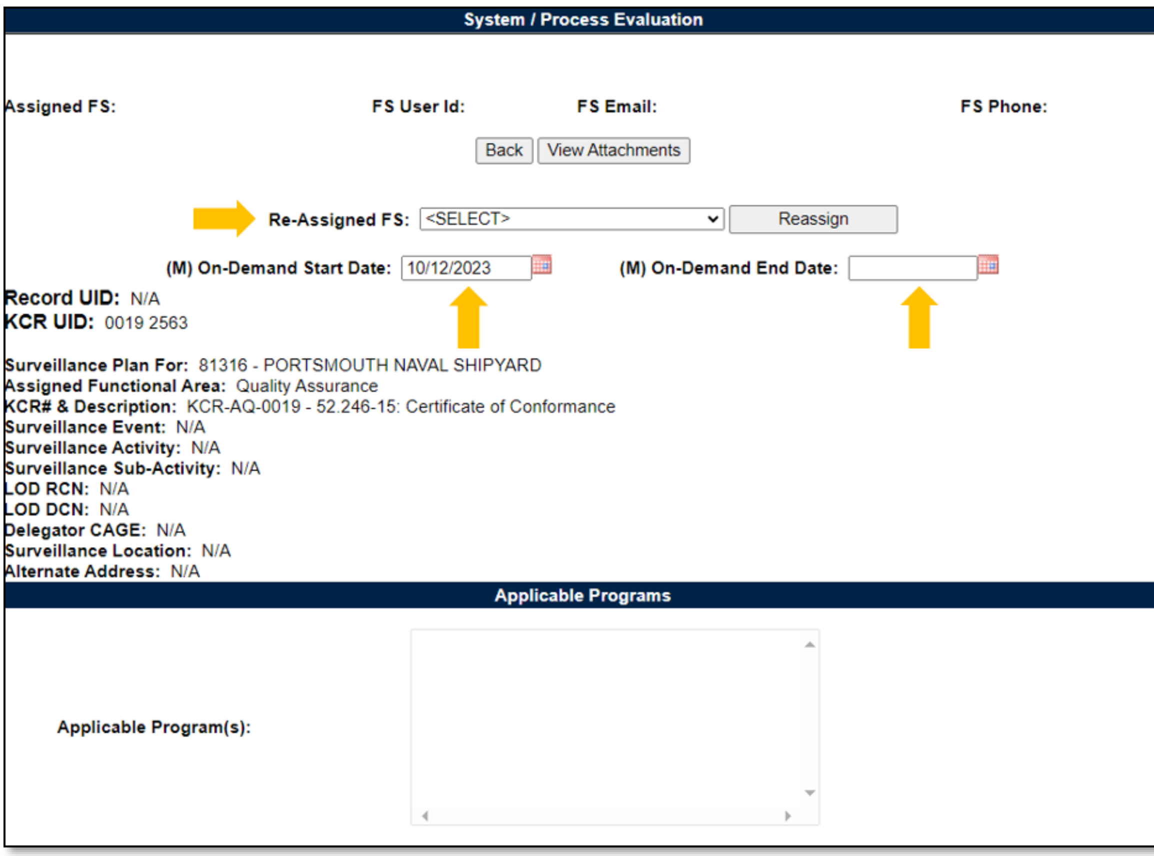


Figure 7.3

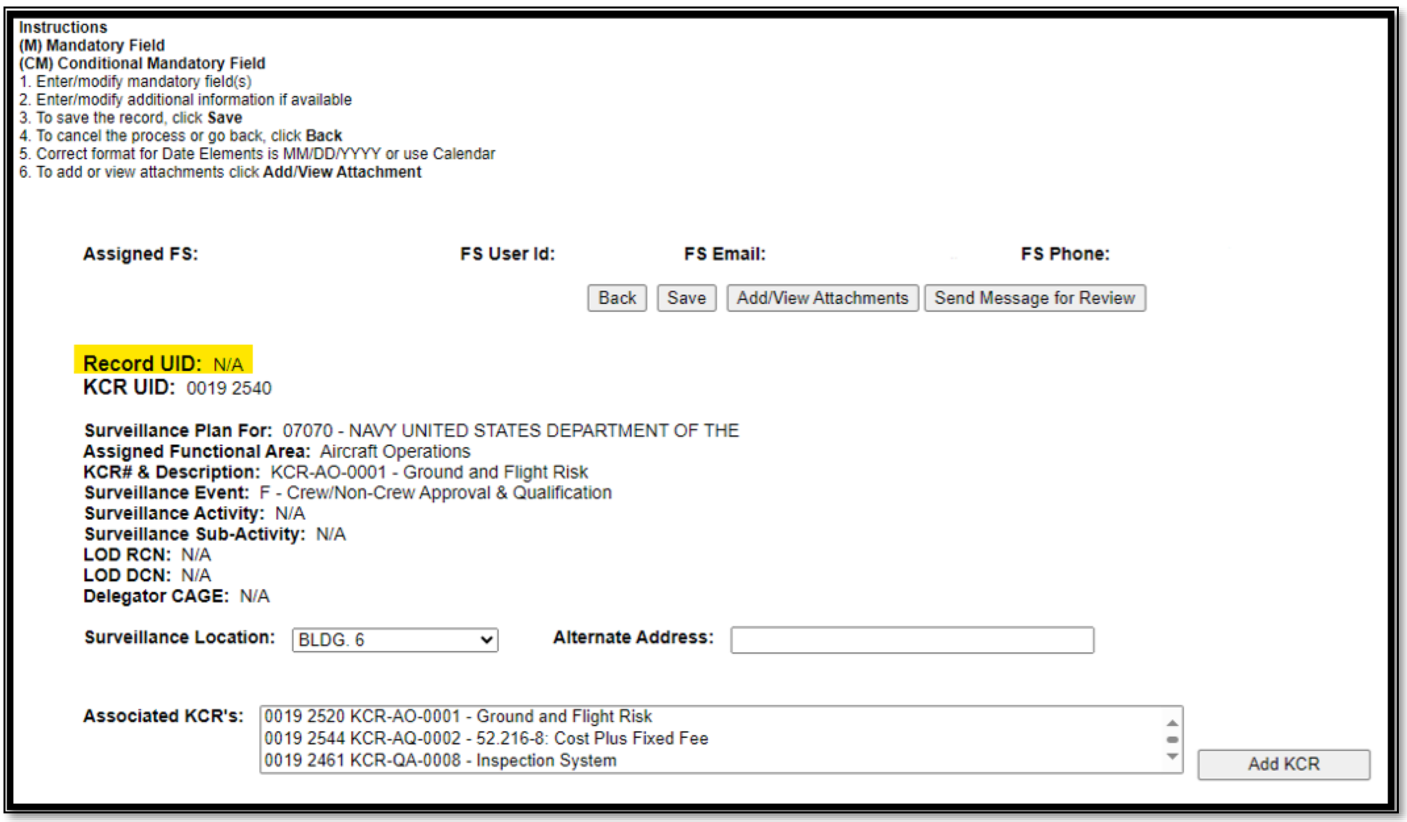
Associated Data Fields for **Figure 7.3**

- **(M) On-Demand End Date:** The date the surveillance is planned to conclude.
- **(M) On-Demand Start Date:** The date the surveillance evaluation is planned to begin.
- **Reassign FS:** Dropdown displaying the assigned FS (of the same Team Code) within the KCR. The selected user will become the Record Owner. Dropdown will be empty when lacking an assigned FS on the same Team.

Associated Button for **Figure 7.3**

- **Back:** Returns the display to the previous page.
- **Reassign:** Clicking this button saves the entries made on the page (acts as a save button).
- **View Attachments:** This button opens the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Record being worked. Please note each Plan, Record and IDR has its own space for Attachments. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.

***Note:** When the Record UID is “N/A” it is a pending draft Record (it has not yet been saved). For this field to populate, the user must save the Record (**Figure 7.3a**).*



Instructions
(M) Mandatory Field
(CM) Conditional Mandatory Field
1. Enter/modify mandatory field(s)
2. Enter/modify additional information if available
3. To save the record, click **Save**
4. To cancel the process or go back, click **Back**
5. Correct format for Date Elements is MM/DD/YYYY or use Calendar
6. To add or view attachments click **Add/View Attachment**

Assigned FS: **FS User Id:** **FS Email:** **FS Phone:**

Back | Save | Add/View Attachments | Send Message for Review

Record UID: N/A
KCR UID: 0019 2540

Surveillance Plan For: 07070 - NAVY UNITED STATES DEPARTMENT OF THE
Assigned Functional Area: Aircraft Operations
KCR# & Description: KCR-AO-0001 - Ground and Flight Risk
Surveillance Event: F - Crew/Non-Crew Approval & Qualification
Surveillance Activity: N/A
Surveillance Sub-Activity: N/A
LOD RCN: N/A
LOD DCN: N/A
Delegator CAGE: N/A

Surveillance Location: BLDG. 6 **Alternate Address:**

Associated KCR's:
0019 2520 KCR-AO-0001 - Ground and Flight Risk
0019 2544 KCR-AQ-0002 - 52.216-8: Cost Plus Fixed Fee
0019 2461 KCR-QA-0008 - Inspection System

Add KCR

Figure 7.3a

A confirmation message will display as shown in **Figure 7.4** when an On-Demand Record has been successfully created/saved.

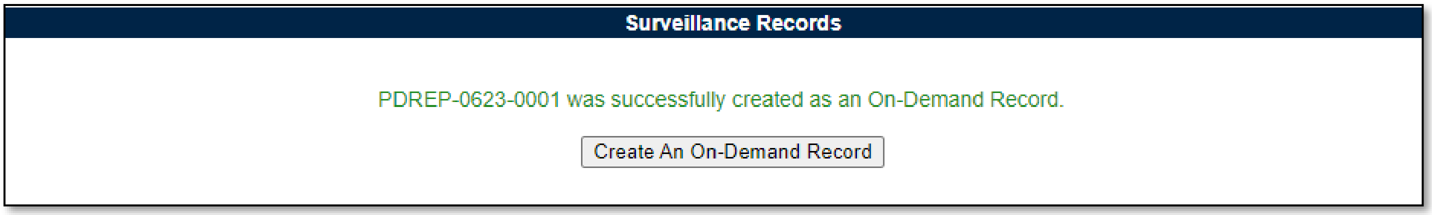


Figure 7.4

Note: *PDREP does not have an auto-save feature. The "Reassign" button acts as a save feature and tells the tool to keep the information. Once the pending On-Demand draft Record has been created, the "Reassign" button must be used to register the page as a draft Record. If the "Reassign" button is not used, work will be lost!*

Since On-Demand Records do not populate in the Scheduler, the tool has added cues to communicate when an On-Demand Record has met or exceeded its End Date. When such an instance occurs, the KCR UID text color will change from black to red. This serves as a cue the identified KCR contains an overdue Record.

Another cue can be seen in a notification of an overdue Record and the Record number. Displaying above the Recently Accessed Table, and at the top of the Surveillance Records Area will be a notification of each overdue On-Demand Record. An example of this may be seen in **Figure 7.5**. To clear these notifications, the overdue Record must be either completed or have its End Date extended.

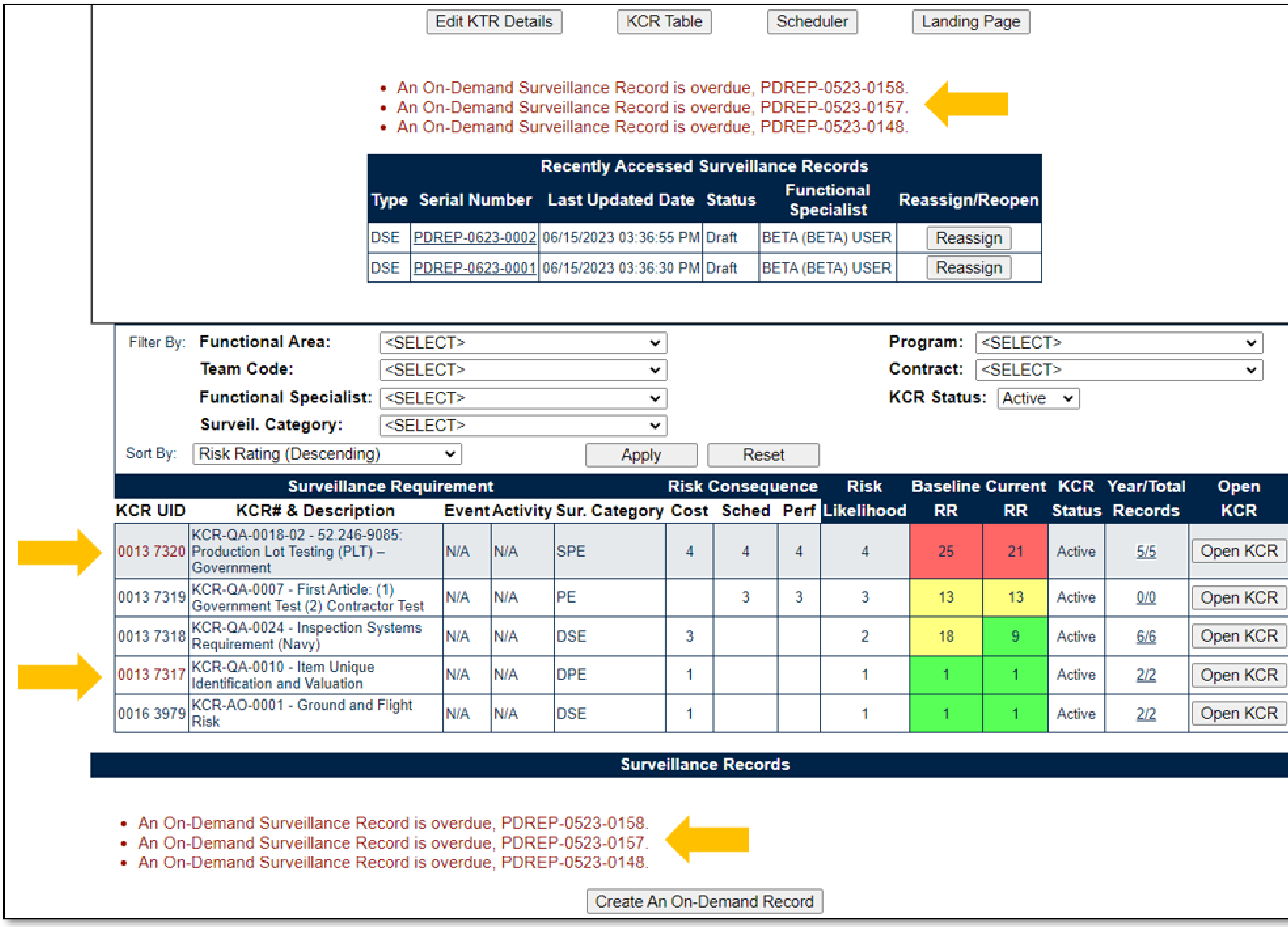


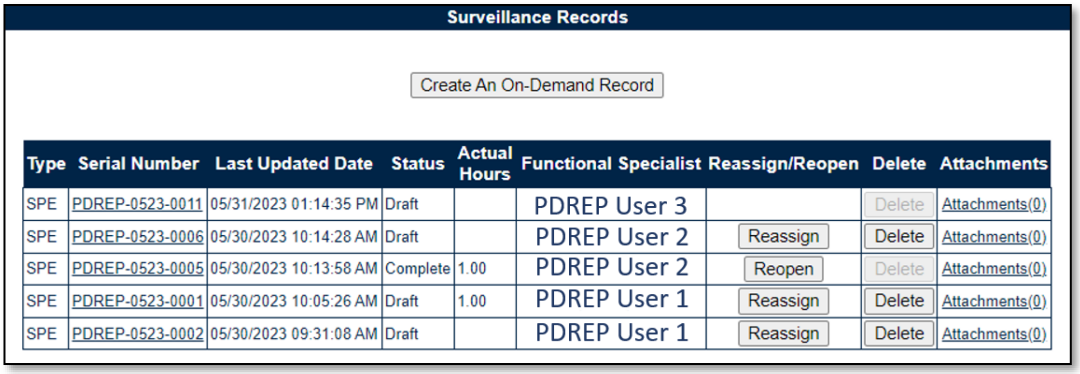
Figure 7.5

8 Record Capabilities

Record Capabilities outside of editing or completing a draft Record is subject to certain restrictions such as Team, Code, User Access or Record Status. Any user with view access or a higher access may open and look at any Record, but the ability to edit or complete a Record is restricted to that of the Record Owner.

8.1 Delete Records

The ability to delete a Record is restricted by a user's access level as well as their Team Code and the Record status. The Delete column (on the Records Page) populates for those users with an access level of Supervisor or higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). An example of a user with the proper access level but differing Team Code is shown on the first row of sample **Figure 8.1**.



Surveillance Records

Create An On-Demand Record

Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 3		Delete	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	Reopen	Delete	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)

Figure 8.1

The ability to delete a Record is also dependent upon the Record being in a draft status. The “Delete” button’s functionality is restricted to those Records marked as “Complete” and will display as grayed/disabled in such instances. An example of this is shown on the third row of sample **Figure 8.1**.

To delete a Record, open the Records Table by selecting the “Year/Total Records” hyperlink. Locate the desired Record to be deleted on the table and select the “Delete” button. A pop-up message will display requesting confirmation of the delete request (**Figure 8.2**).

- **OK:** Captures the request and eliminates the Record and its contents.
- **Cancel:** Refreshes the page, clears the delete request and returns to the top of the Records Page.

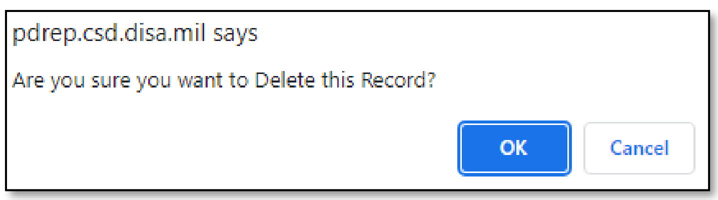


Figure 8.2

After the page refresh, a confirmation message will display as shown in **Figure 8.3**, stating the Record has been successfully deleted.

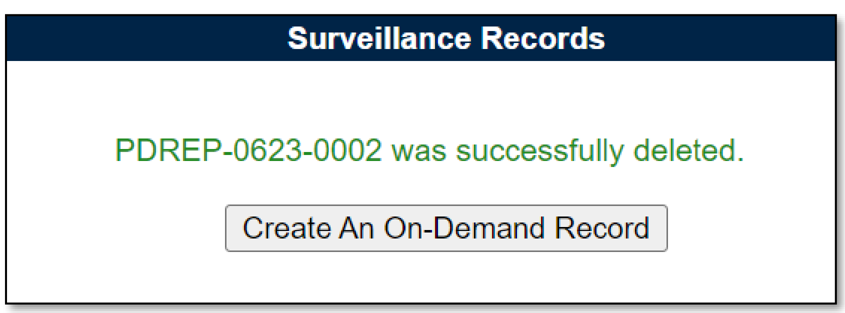
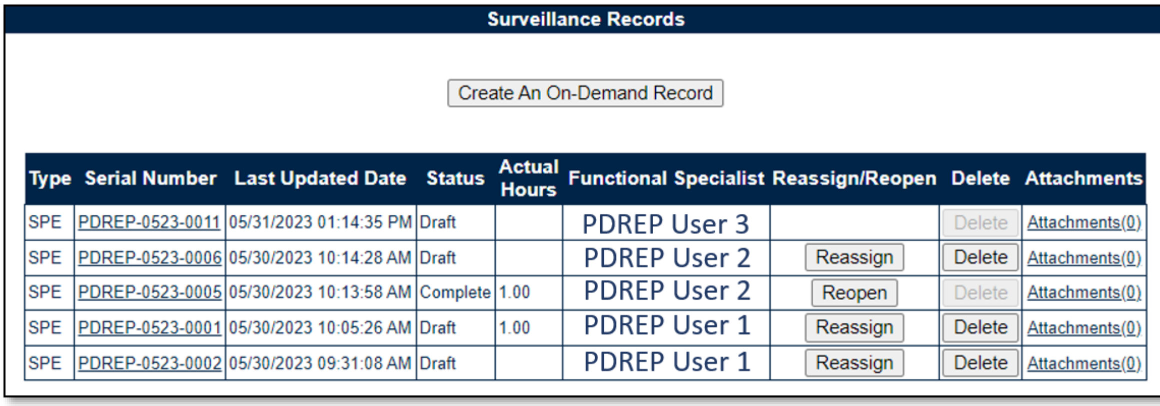


Figure 8.3

8.2 Record Reassign

The ability to Reassign a Record is restricted by a user's access level as well as their Team Code and the Records status. The Reassign/Reopen column (on the Records Page) populates for those users with an access level of Supervisor or a higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). An example of a user with the proper access level but differing Team Code is shown on the first row of sample **Figure 8.4**.



Surveillance Records

Create An On-Demand Record

Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 3		Delete	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	Reopen	Delete	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)

Figure 8.4

The ability to Reassign a Record is also dependent upon the Record being in a draft status. The "Reassign" button's functionality is restricted to those Records marked as "Complete" and will display as "Reopen" in such instances. An example of this is shown on the third row of sample **Figure 8.4**.

To reassign a Record, start by opening the Surveillance Records Table of the KCR for which the Record is associated. Locate the Record in need of being reassigned and select the "Reassign" button to initiate the process. A pop-up message will display requesting confirmation of the Reassign request as seen in **Figure 8.5**.

- **Cancel:** Refreshes the page, clears the delete request and returns to the top of the Records page.
- **OK:** Captures the request and eliminates the Record and its contents.

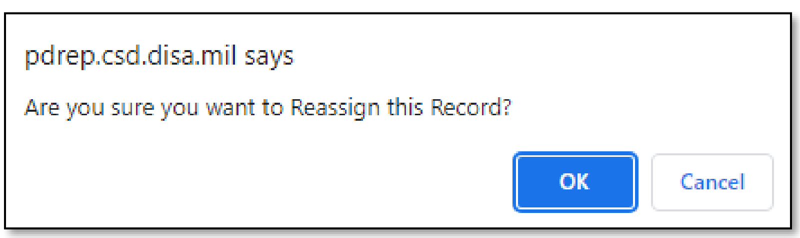


Figure 8.5

After the page refresh, the Record will open to a view only display except for the "Re-Assigned FS" field as shown in **Figure 8.6**. The dropdown populates with other assigned FS of the KCR who share a Team Code. After selecting the intended user to take ownership of the Record, click the "Reassign" button to capture the change.

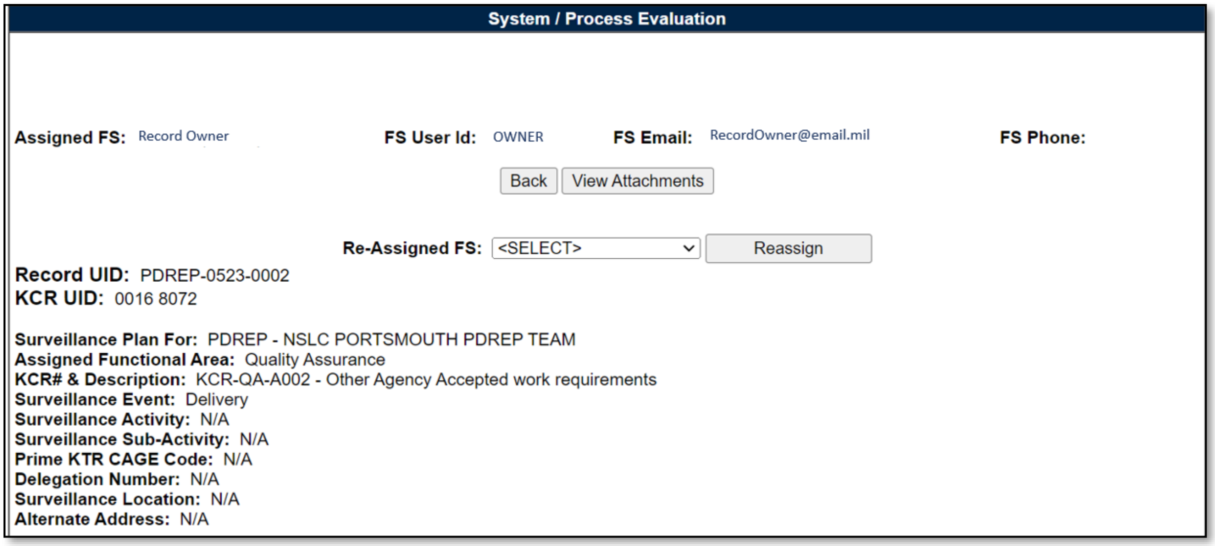


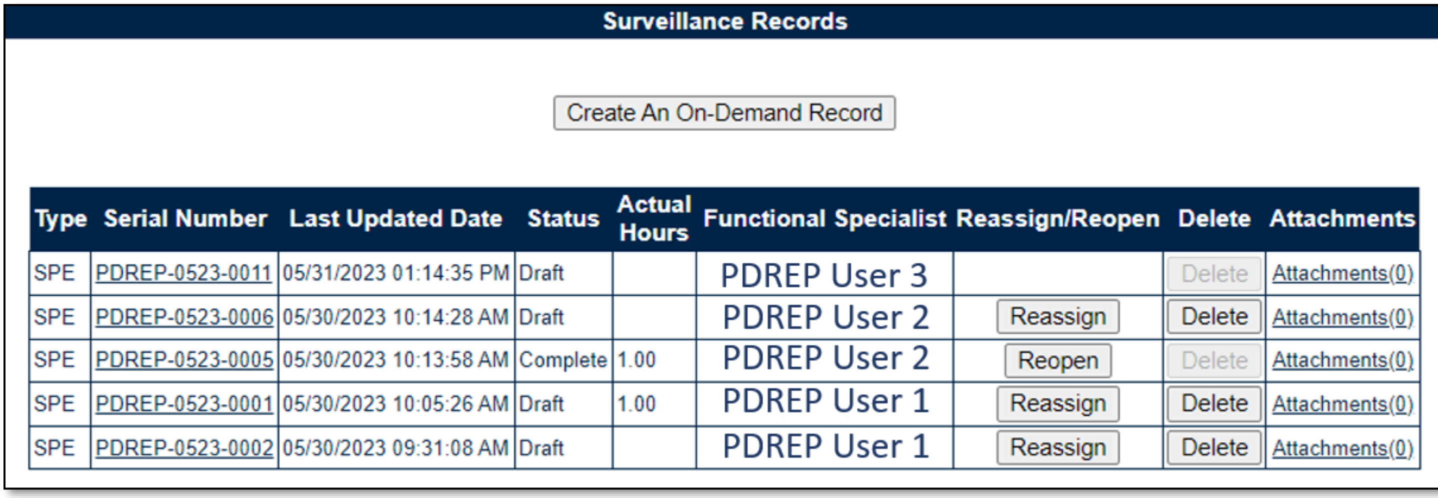
Figure 8.6

After the page refresh, a confirmation message will display as shown in **Figure 8.7**, stating the Record has been successfully reassigned.

Figure 8.7

8.3 Record Reopen

The ability to Reopen a Record is restricted by a user's access level as well as their Team Code and the Record status. The Reassign/Reopen column (on the Records page) populates for those users with an access level of Supervisor or a higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). An example of a user with the proper access level but differing Team Code is shown on the first row of sample **Figure 8.8**.



Surveillance Records

Create An On-Demand Record

Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 3		Delete	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	Reopen	Delete	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)

Figure 8.8

The ability to Reopen a Record is also dependent upon the record being in a "Complete" status. The "Reopen" button's functionality is restricted to those Records marked as "Complete" and will display as "Reassign" in such instances. An example of this is shown on the second row of sample **Figure 8.8**.

To Reopen a Record, start by opening the Surveillance Records Table of the KCR for which the Record is associated. Locate the Record in need of being reopened and select the "Reopen" button to initiate the process. A pop-up message will display requesting confirmation of the Reopen request as seen in **Figure 8.9**.

- **Cancel:** Refreshes the page, clears the delete request and returns to the top of the Records Page.
- **OK:** Captures the request and eliminates the Record and its contents.

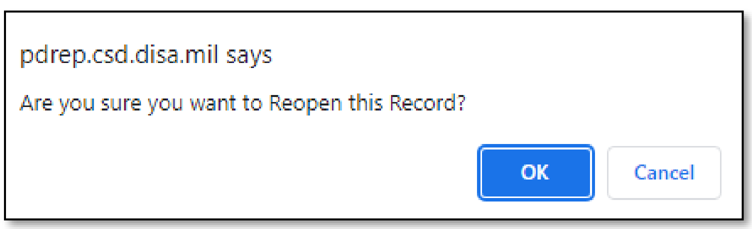


Figure 8.9

After the page refresh, a confirmation message will display as shown in **Figure 8.10** stating the Record has been successfully reopened.

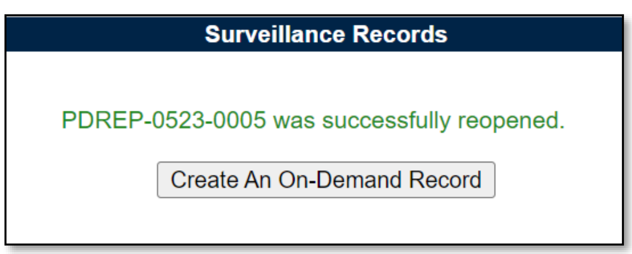


Figure 8.10

When a Record contains completed IDRs and is reassigned, the associated IDRs will be untouched and maintain their existing data. When a Record contains a draft IDR and is reassigned, the draft IDR(s) are also reassigned to the new Record Owner.

9 DPE/DSE

The SP tool currently supports four Record types:

1. Deliverable Product Evaluation (DPE)
2. Deliverable Service Evaluation (DSE)
3. System Process Evaluation (SPE) (Note: Also may be “S/PE”)
4. Progress Evaluation (PE)

DPE and DSE are functionally similar within the module and detailed in Section 9.
SPE and PE are functionally similar within the module and detailed in Section 10.

Though Deliverable Product Evaluation (DPE) & Deliverable Service Evaluation (DSE) share the same display, there are a few differences.

i. Page Title/Header
   (states if the Record type is a DPE or a DSE)
ii. DPEs can house IDRs.
   (exclusive to Quality Assurance KCRs)
iii. Evaluation Section will be absent for DPEs with IDRs

9.1 Creating a DPE or DSE

Since Record creation is restricted to one Record type per KCR, the creation of a DPE or a DSE starts at the KCR level with the selection of the Surveillance Category data field (**Figure 9.1**).

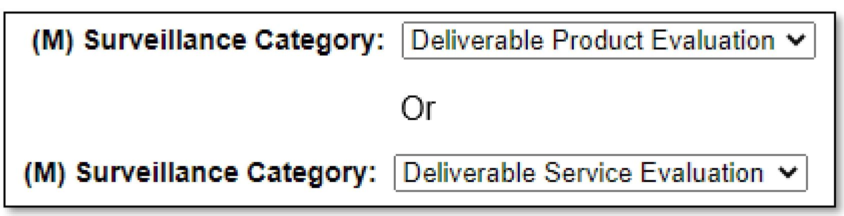


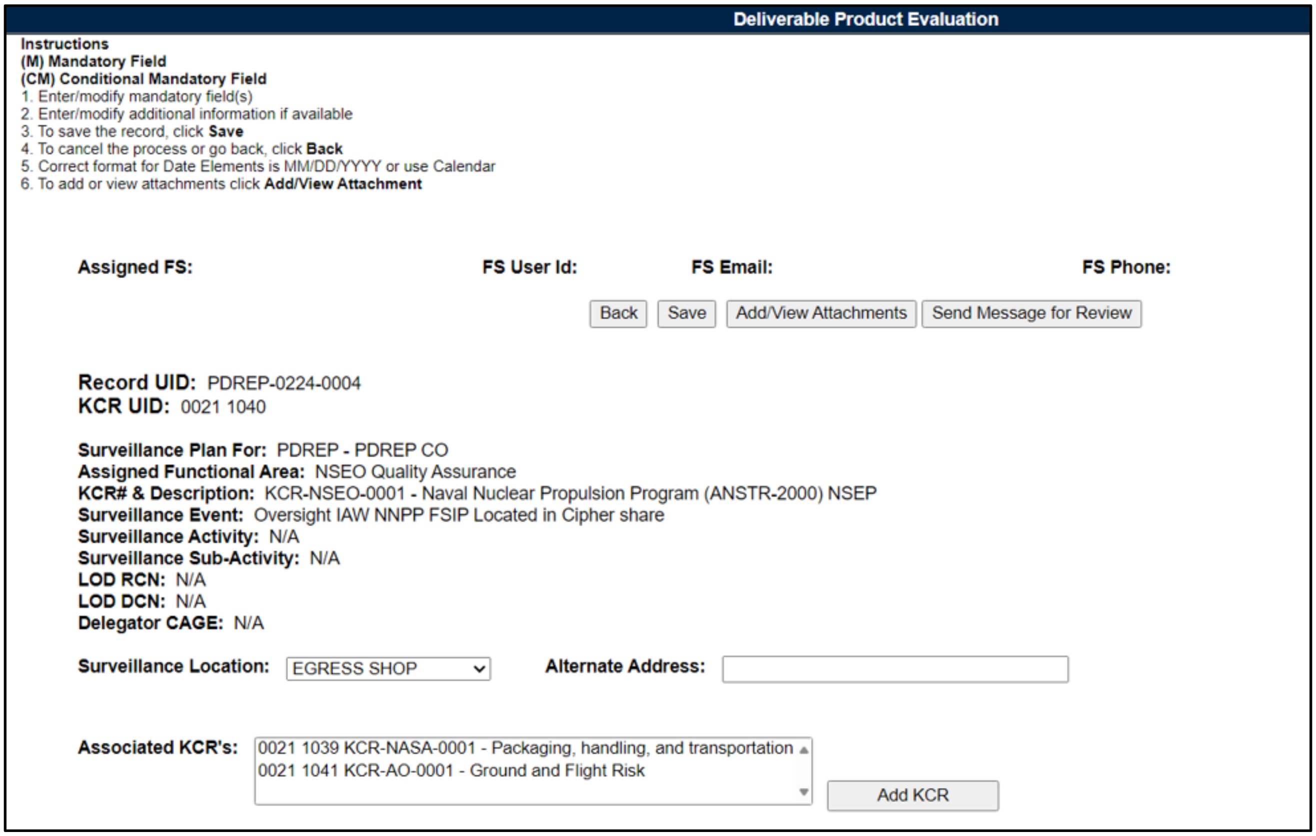
Figure 9.1

Once the Record type has been established (within the KCR), a Record may be created one of two ways: traditionally or On-Demand.
Traditional Records are generated through the population of occurrences on the Scheduler. Select the “New” button to begin the creation of a draft DPE/DSE Record.

On-Demand Records are created through the Surveillance Records area of the Records Page. After locating the desired KCR for which the Record needs to be created and selecting the “Year/Total Records” hyperlink, click the “Create An On-Demand Record” button to open the draft creation of the On-Demand Record for a DPE/DSE.

9.1.1 Record Details (DPE/DSE)

Figure 9.2 shows the Details section of a DPE/DSE Record.



Deliverable Product Evaluation

Instructions
(M) Mandatory Field
(CM) Conditional Mandatory Field
1. Enter/modify mandatory field(s)
2. Enter/modify additional information if available
3. To save the record, click **Save**
4. To cancel the process or go back, click **Back**
5. Correct format for Date Elements is MM/DD/YYYY or use Calendar
6. To add or view attachments click **Add/View Attachment**

Assigned FS: **FS User Id:** **FS Email:** **FS Phone:**

Back | Save | Add/View Attachments | Send Message for Review

Record UID: PDREP-0224-0004
KCR UID: 0021 1040

Surveillance Plan For: PDREP - PDREP CO
Assigned Functional Area: NSEO Quality Assurance
KCR# & Description: KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP
Surveillance Event: Oversight IAW NNPP FSIP Located in Cipher share
Surveillance Activity: N/A
Surveillance Sub-Activity: N/A
LOD RCN: N/A
LOD DCN: N/A
Delegator CAGE: N/A

Surveillance Location: EGRESS SHOP **Alternate Address:**

Associated KCR's: 0021 1039 KCR-NASA-0001 - Packaging, handling, and transportation
0021 1041 KCR-AO-0001 - Ground and Flight Risk
Add KCR

Figure 9.2

Associated Data Fields for **Figure 9.2**

- **Alternate Address:** Open text box for entering an alternate address *(max of 75 characters).*
- **Assigned FS:** Also known as the "Record Owner", this is the Functional Specialist responsible for the Record. Automatically generated by the users' profile.
- **Assigned Functional Area:** The Functional Area established and pulled from the KCR.
- **Associated KCRs:** A dropdown listing other KCR UID, KCR# & Description(s) for which the Record Owner is also an assigned FS. This list is restricted to those KCRs within the same Surveillance Plan as the Record being created. When an Associated KCR is selected from the dropdown and the "Add KCR" button is used, the KCR will be added to the Associated KCR Table.
  - Users may make multi-selections from the dropdown provided.
  - Completed KCRs will not display in the dropdown.
  - Dropdown is hidden when all values have been applied to the table.
  - Field will be blank when no other KCRs have the Record Owner as an Assigned FS.
- **Associated KCR Table:** List of Associated KCRs that have been selected and added to the Record from the Associated KCR dropdown.
  - When an Associated KCR is marked complete, the line item of the KCR will be grayed out, and the KCR will be moved to the bottom of the table's display (see **Figure 9.3**).
  - In such instances where a KCR is no longer Warranted, the line item of the KCR will be grayed out.

- KCRs may be removed by selecting the corresponding box under “Delete” and selecting the “Delete” button.
- A completed KCR may be removed from the Associated KCR table display list, but it cannot be added.
- **Figure 9.3** shows a display of the Associated KCR table.
- Though the Associated KCR table can accommodate multiple selections, it will be hidden until a KCR is applied.

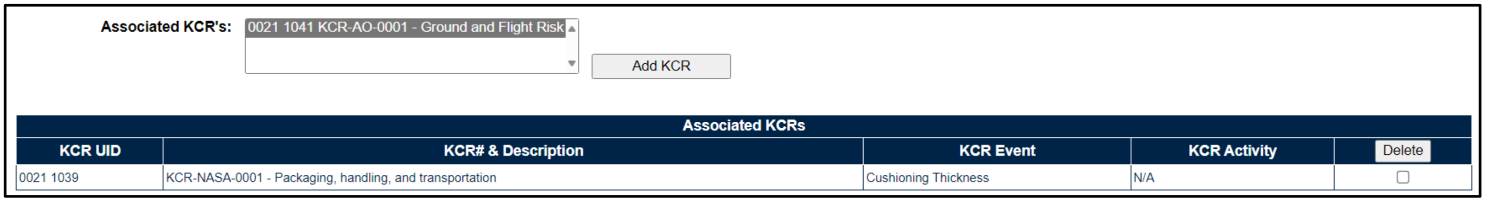


Figure 9.3

- **FS Email:** Taken from the users’ profile, this is the Email address of the assigned Functional specialist who will be conducting the surveillance.
- **FS Phone:** Taken from the users’ profile, this is the phone number of the assigned Functional Specialist who will be conducting the surveillance.
- **FS User Id:** The User ID of the assigned Functional Specialist who will be conducting the surveillance *(generally the first initial of the users first name, followed by the first 4 letters of the last name, sometimes ending in a number).*
- **KCR UID:** The 8-digit unique identifier of the KCR for which the Record is associated with.
- **KCR # & Description:** The KCR# and Description established and pulled from the KCR.
- **LOD RCN:** Record Control Number of the Incoming LOD associated to the KCR.
- **LOD DCN:** Document Control Number of the Incoming LOD associated to the KCR.
- **Delegator CAGE:** CAGE Code with the associated incoming LOD RCN/DCN from the KCR.
- **Record UID:** The 13-digit unique identifier of the Record. The Record UID will automatically generate when the Record is saved.
  - **Record UID Format:**
    Plan’s Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
    Example: PDREP - 0622 - 0001
- **Surveillance Activity:** The Surveillance Activity established and pulled from the KCR. Field will display as “N/A” when lacking a Surveillance Activity in the KCR.
- **Surveillance Event:** The Event established and pulled from the KCR. Field will display as “N/A” when lacking a Surveillance Event in the KCR.
- **Surveillance Location:** Restricted to a single selection, this dropdown displays the associated KCR location(s) as established in the KCR.
- **Surveillance Plan For:** The CAGE Code and Company Name of the contractor to whom the Surveillance Plan is attributed.
- **Surveillance Sub-Activity:** The Surveillance Sub-Activity established and pulled from the KCR. Field will display as “N/A” when lacking a Surveillance Sub-Activity in the KCR.

Associated Table Columns for **Figure 9.3**

- **KCR Activity:** The Activity of the *Associated* KCR for which the Record Owner is also an assigned FS. The field will display as “N/A” when lacking a Surveillance Activity in the KCR.
- **KCR Event:** The Event of the *Associated* KCR for which the Record Owner is also an assigned FS. The field will display as “N/A” when lacking a Surveillance Event in the KCR.
- **KCR UID:** The 8-digit unique identifier of the *Associated* KCR for which the Record Owner is also an assigned FS.
- **KCR# & Description:** The KCR# and Description of the *Associated* KCR for which the Record Owner is also an assigned FS.

Associated Button Functionality for **Figure 9.3**

- **Add KCR:** Applies the selected KCR to the Associated KCR table.
- **Add/View Attachments:** This button opens to the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Record being worked.
- **Back:** Returns the display to the previous page.
- **Delete:** Removes the Associated KCR from the Table and reapplies to the Associated KCR dropdown. Action occurs when the corresponding box is selected and the “Delete” button is clicked.
- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected a warning will populate notifying the user the Record is about to be marked as “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.
  - Please note each Plan, Record and IDR has its own space for Attachments. This means applied documents are exclusive to the location they were applied and will not populate elsewhere.
- **Send Message for Review:** Saves the Record as a draft status before opening the Correspondence Page. After the refresh, messages may be sent to other Surveillance Plan users.

9.1.2 Applicable End Items (DPE/DSE)

Figure 9.4 shows the default view of the Applicable End Item NSN/Part/Serial Numbers section. The End Item dropdown list populates End Items added to the Surveillance Plan and located on the KTR Details Page. For Records associated with Quality Assurance KCRs, a minimum of one End Item must be applied to complete the DPE.

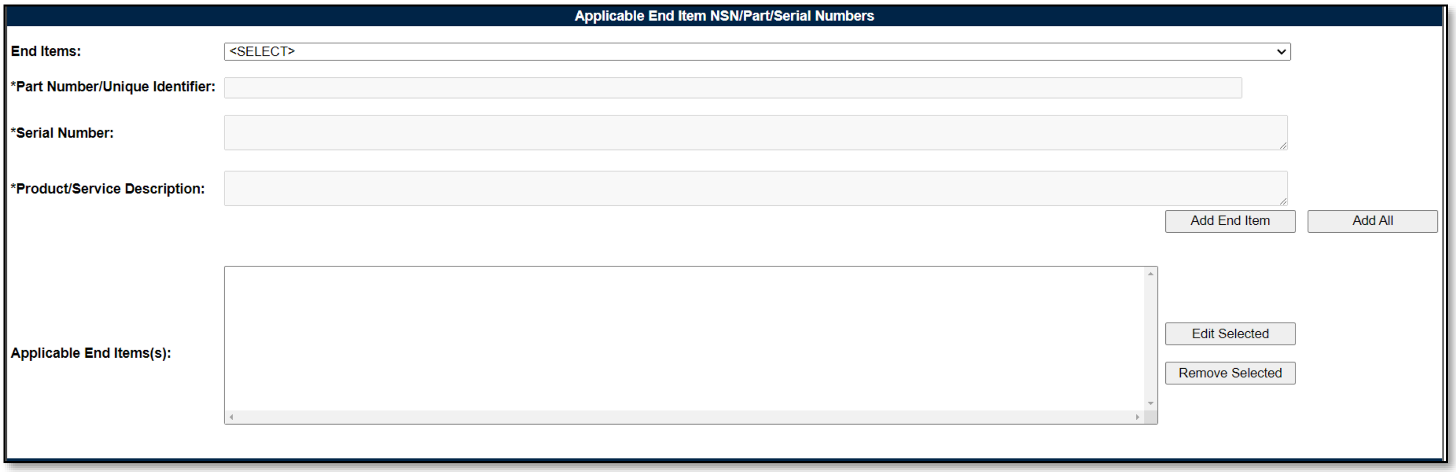


Figure 9.4

Select a corresponding End Item from the dropdown provided. After the page refresh, *Part Number/Unique Identifier, *Serial Number and* Product/Service are auto populated with values from the KTR Details page. An example of this is shown on **Figure 9.5**.

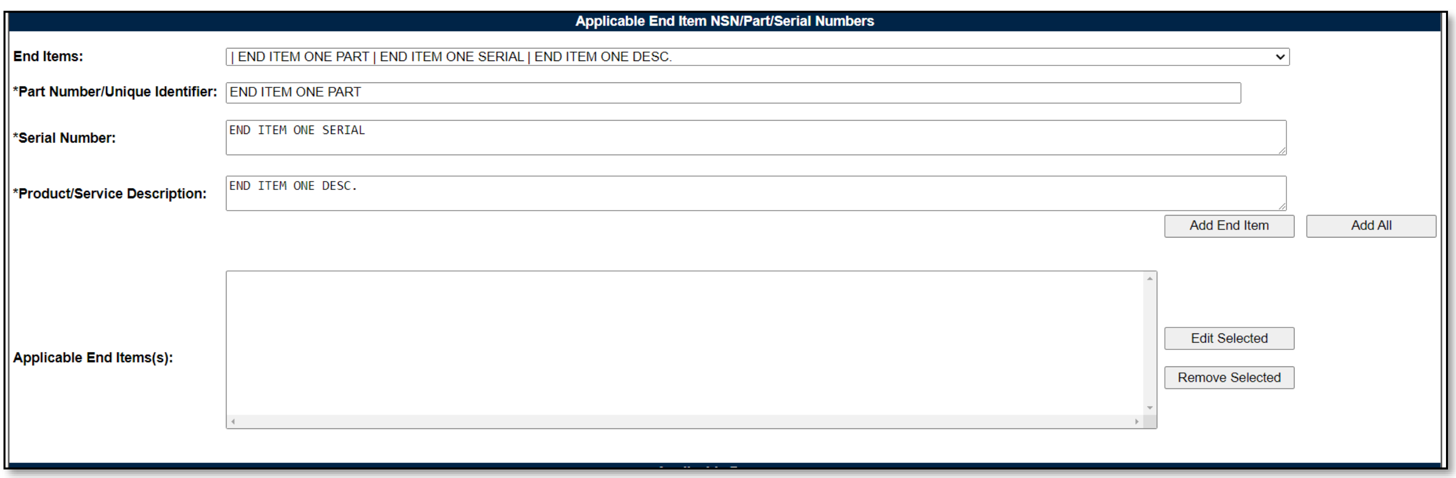


Figure 9.5

Though the three text fields automatically populate content entered at the KTR Details Page, these identifying fields of the End Item selected may be edited or added to without altering the sourced content. **Figure 9.6** displays the pulled content from **Figure 9.5** as well as additional text added at the Record level.

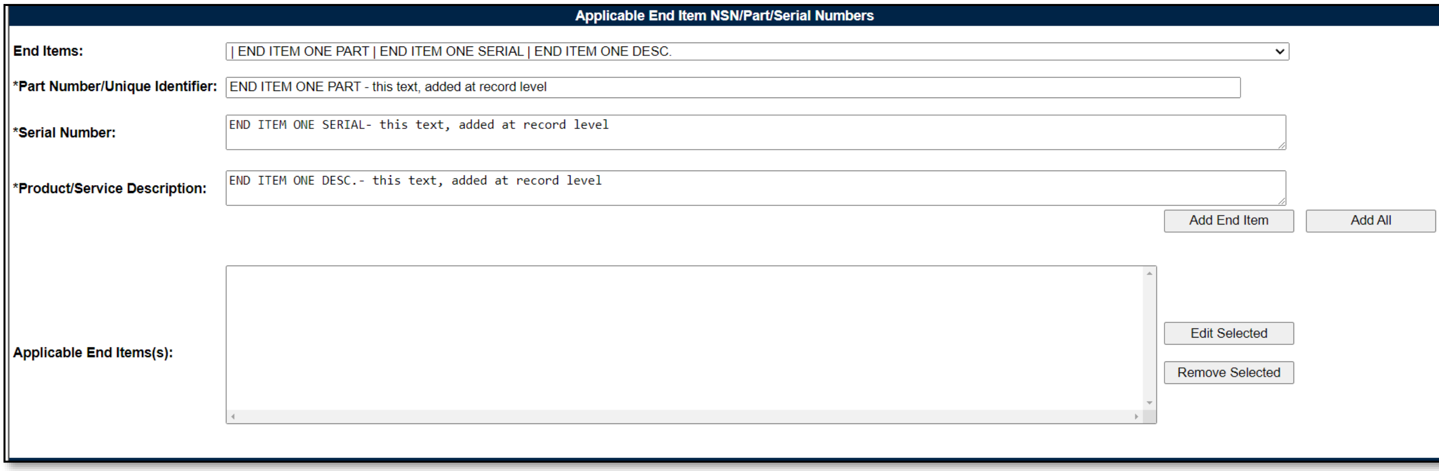


Figure 9.6

When applied to the Applicable End Item(s) list box, the three identifying fields (Part Number/Unique Identifier, Serial Number and Product/Service Description) will display the contents of the KTR first, followed by a line of distinction and then entries made at the Record. An example of this is shown in **Figure 9.7** with content from **Figure 9.5** and **Figure 9.6**.

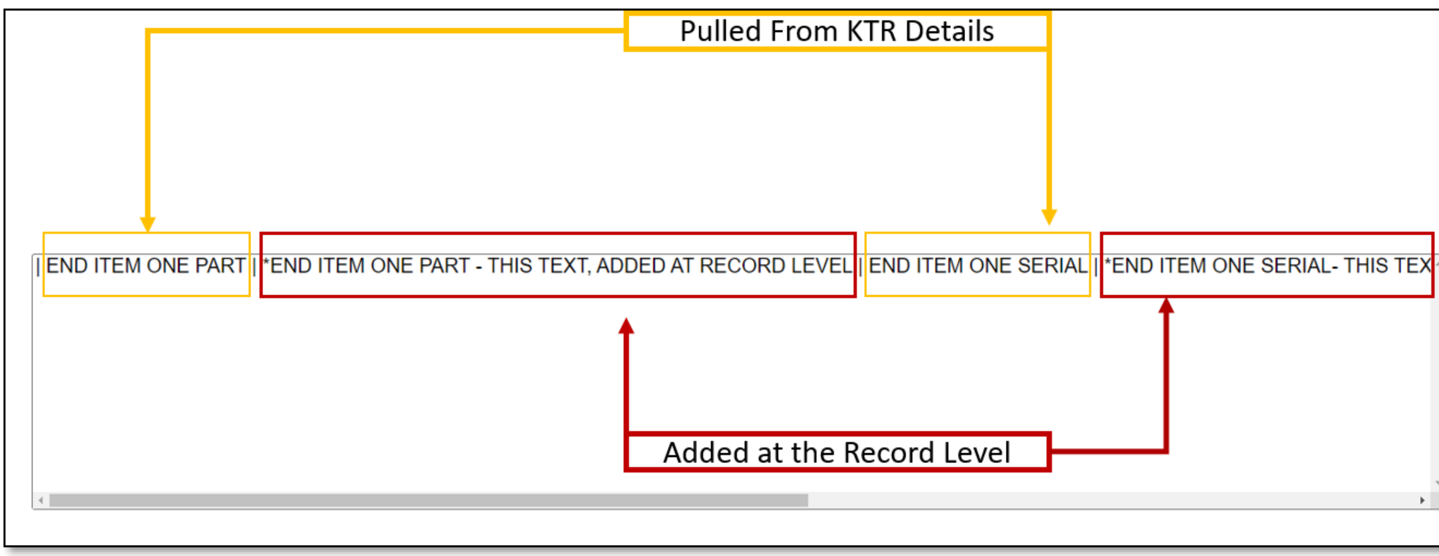


Figure 9.7

Select the “Add End Item” button to apply End Item selection along with additional text to the Applicable End Item(s) list box as seen in **Figure 9.8**.

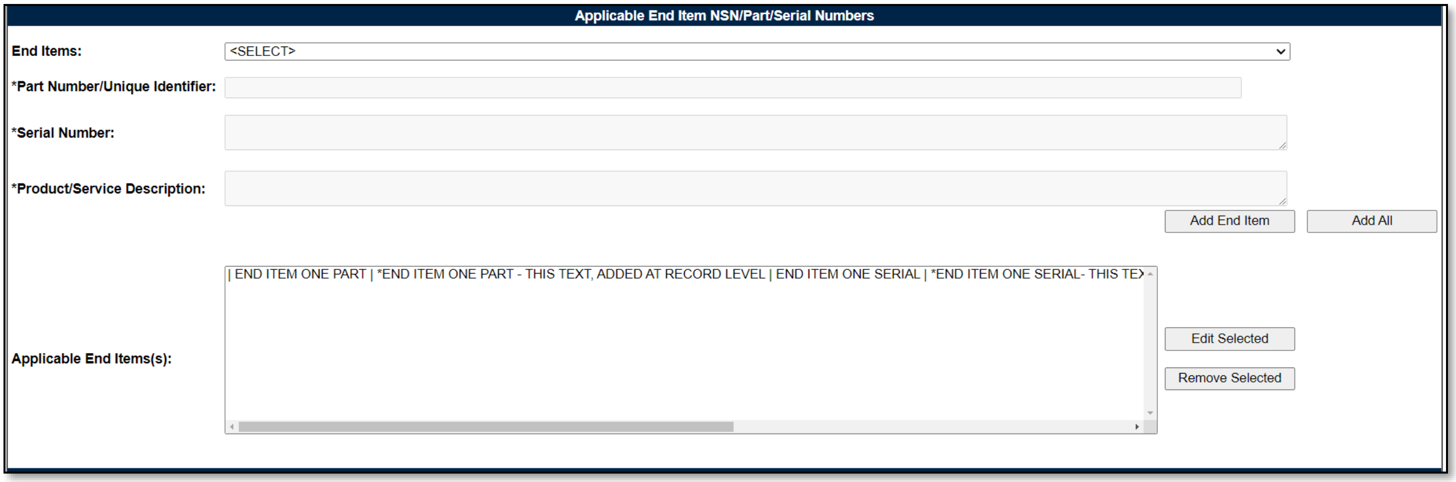


Figure 9.8

Associated Data Fields for **Figure 9.8**

- **Applicable End Item(s):** List box containing the End Items selected as Applicable to the Record being worked.
- **End Items:** Dropdown list comprised of End Items located on the KTR Details page. Field will be blank when the KTR lacks an End Item.
- ***Part Number/Unique Identifier:** Pulls Part Number/Unique Identifier content from the KTR Details page that may be edited or removed at the Record level. Asterisk (*) denotes content established at the Record level. Field will be blank when the End Item lacks a Part Number/Unique Identifier in the KTR *(max of 75 characters).*
- ***Product/Service Description:** Pulls Product/Service Description content from the KTR Details Page that may be edited or removed at the Record level. Asterisk (*) denotes content established at the Record level. Field will be blank when the End Item lacks a Product/Service Description in the KTR *(max of 200 characters).*
- ***Serial Number:** Pulls Serial Number content from the KTR Details Page that may be edited or removed at the Record level. Asterisk (*) denotes content established at the Record level. Field will be blank when the End Item lacks a Serial Number in the KTR *(max of 1,000 characters).*

Associated Button Functionality for **Figure 9.8**

- **Add All:** This button adds the listed End Items displayed in the dropdown to the Applicable End Item(s) list box. When used, the End Items dropdown list will be empty.
- **Add End Item:** This button adds the selected End Item, along with Record level text, to the Applicable End Item(s) list box. When applied, the selected End Item will no longer populate in the dropdown.
- **Edit Selected:** This button opens the selected End Item to an editable display. The “Update End Item” button must be used to apply the End Item back to the list box.
- **Remove Selected:** Removes the selected item from the Applicable End Item(s) text box and returns it to the End Item dropdown.
- **Update End Item:** This button takes the place of the “Add End Item” button when an applied End Item is being edited. When used, the selected End Item being edited will be applied to the Applicable End Item(s) list box.

9.1.3 Applicable Programs (DPE/DSE)

Figure 9.9 shows the default view of the Applicable Programs section. The Program Name dropdown list populates Programs added to the Surveillance Plan.

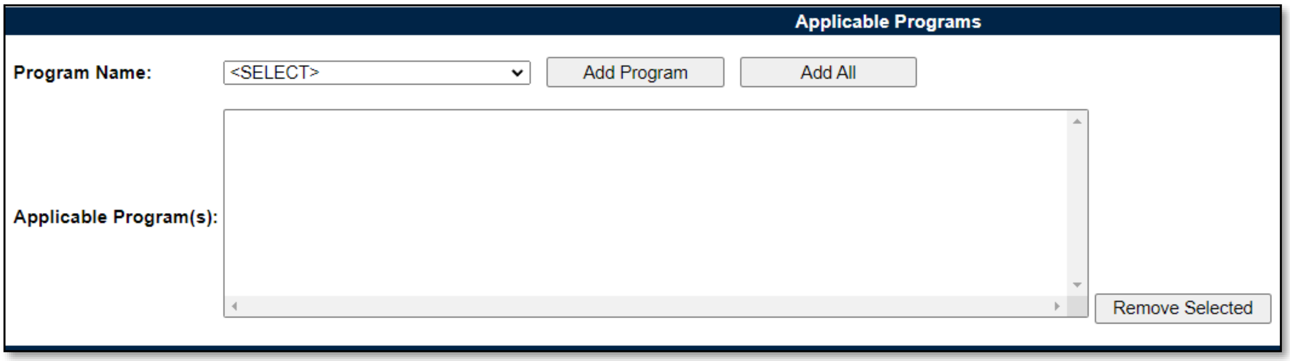


Figure 9.9

Select a corresponding Program from the dropdown provided as shown in **Figure 9.10**. Click the “Add Program” button to apply selection to the Applicable Program(s) list box.

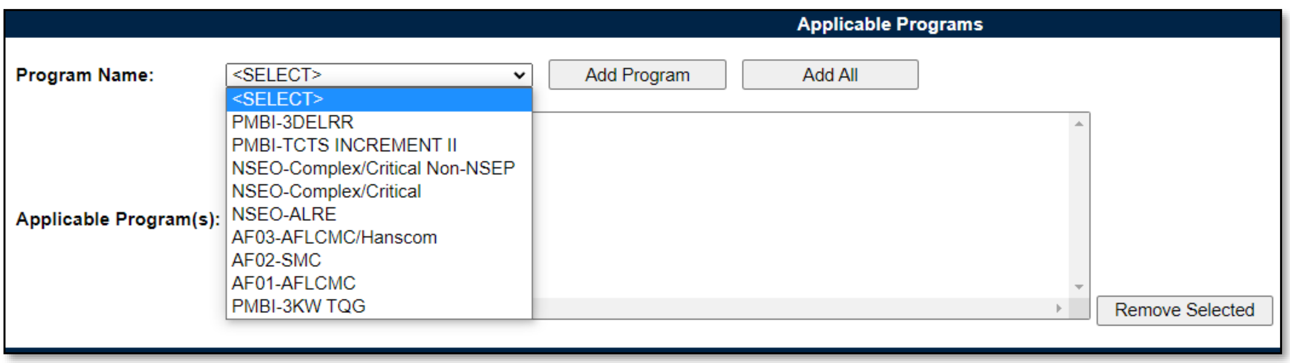


Figure 9.10

The “Add All” button applies all Programs listed in the dropdown to the Applicable Programs(s) list box. When used, the page will refresh with the contents of the dropdown displaying in the list box and the Program Name dropdown empty. An example of this can be seen in **Figure 9.11**.

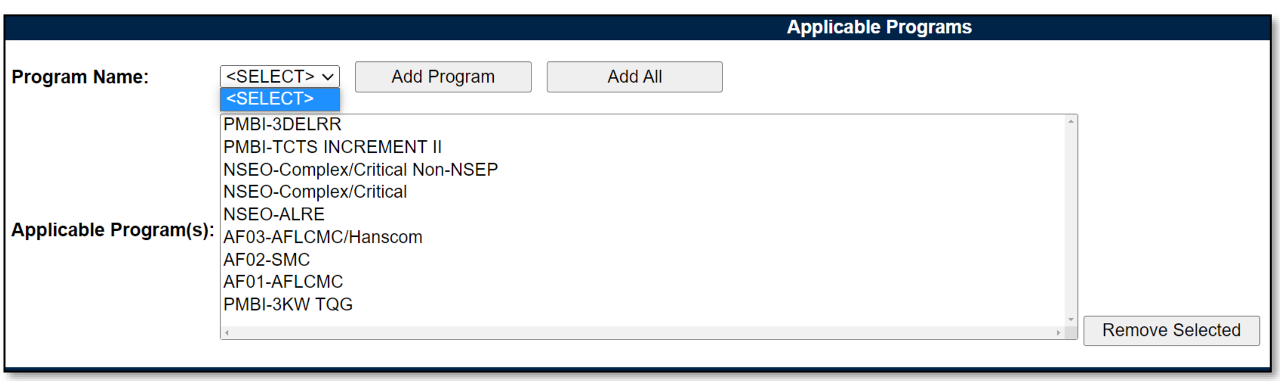


Figure 9.11

Associated Data Fields for **Figure 9.11**

- **Applicable Program(s):** List box containing the Programs selected as Applicable to the Record being worked.
- **Program Name:** Dropdown list comprised of Programs housed within the KTR Details. Archived Programs will not populate in the dropdown.

Associated Button Functionality for **Figure 9.11**

- **Add All:** This button adds the listed Programs displayed in the dropdown to the Applicable Program(s) list box. When used, the Program Name dropdown list will be empty.
- **Add Program:** This button adds the selected Program to the Applicable Program(s) list box. When applied, the selected Program will no longer populate in the dropdown.
- **Remove Selected:** Removes the selected item from the Applicable Program(s) list box and returns it to the Program Name dropdown.

9.1.4 Applicable Contracts (DPE/DSE)

Figure 9.12 shows the default view of the Applicable Contracts section. The Contract Number dropdown list populates Contracts added to the Surveillance Plan.

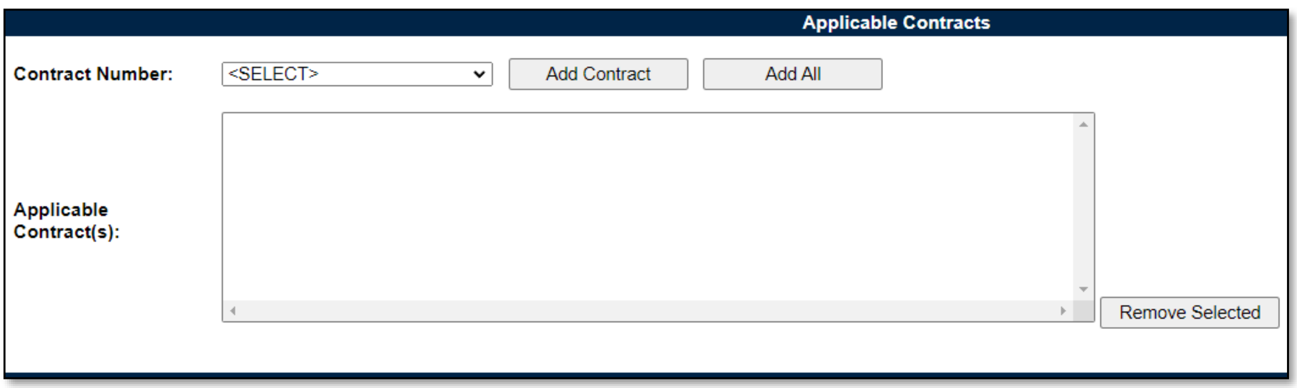


Figure 9.12

Select a corresponding Contract from the dropdown provided as shown in **Figure 9.13**. Click the “Add Contract” button to apply selection to the Applicable Contract(s) list box.

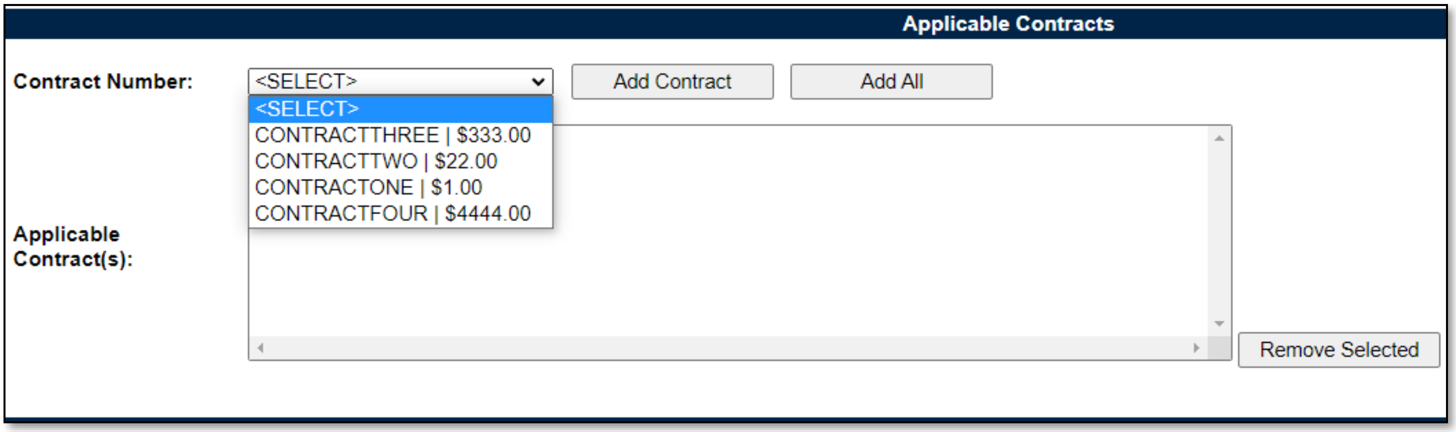


Figure 9.13

The "Add All" button applies the Contracts listed in the dropdown to the Applicable Contract(s) list box. When used, the page will refresh with the contents of the dropdown displaying in the list box with the Contract Number dropdown empty. An example of this can be seen in **Figure 9.14**.

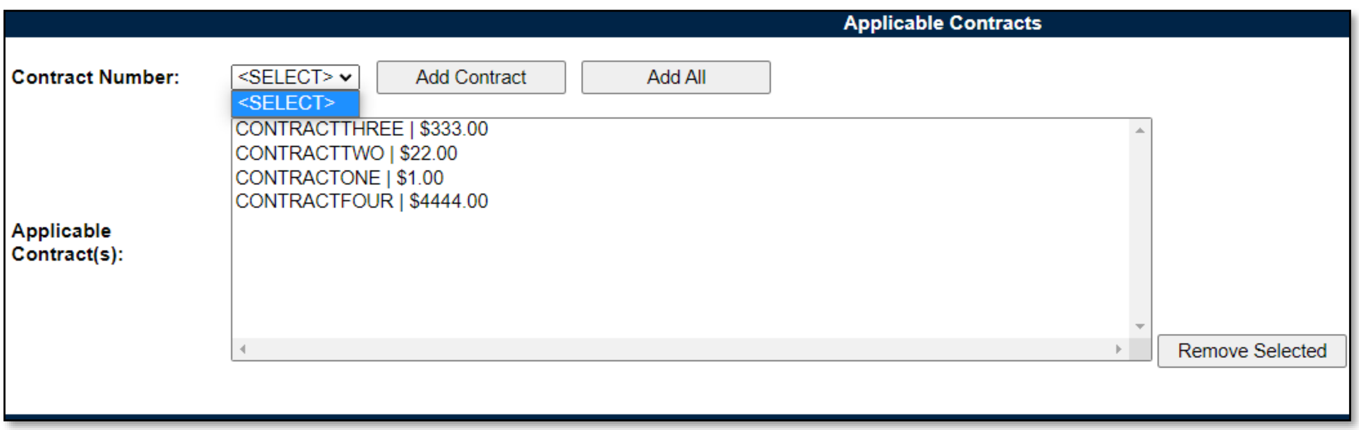


Figure 9.14

Associated Data Fields for **Figure 9.14**

- **Applicable Contract(s):** List box containing the Contracts selected as Applicable to the Record being worked.
- **Contract Number:** Dropdown list comprised of Contracts housed within the KTR Details. Archived Contracts will not populate in the dropdown.

Associated Button Functionality for **Figure 9.14**

- **Add All:** This button adds the listed Contracts displayed in the dropdown to the Applicable Contract(s) list box. When used, the Contract Number dropdown list will be empty.
- **Add Contracts:** This button adds the selected Contracts to the Applicable Contract(s) list box. When applied, the selected Contract will no longer populate in the dropdown.
- **Remove Selected:** Removes the selected item from the Applicable Contract(s) list box and returns it to the Contract Number dropdown.

9.1.5 KTR Information (DPE/DSE)

Figure 9.15 shows a dropdown of available POCs who have been added to the KTR Details page. This is where the Record houses the point(s) of contact for the KTR.

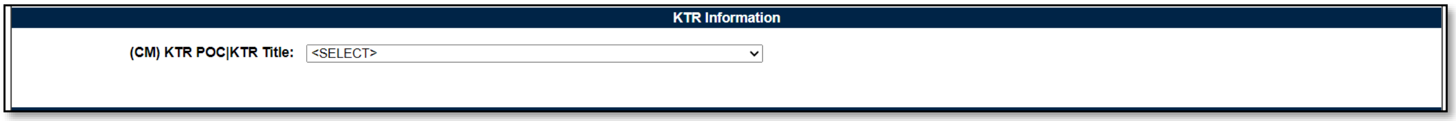


Figure 9.15

In the conclusion section, if the Evaluation Result is 'Un-Satisfactory', then the KTR POC selection is required. When no KTR POC is available, the user must go back to the KTR Details page and enter at least one KTR POC.

9.1.6 Associated IDRs (DPE)

Figure 9.16 shows the default view of the associated Inspection Details Report (IDR) section. This area is exclusive to certain functional areas (AO, CS, NASA, NSEO, & QA) for Deliverable Product Evaluation (and System/Process Evaluation) Record types. This is where IDRs are created and housed for the associated DPE (and S/PE) Record. The figures and explanations of this section serve as an overview of the IDR area outside of the Inspection.

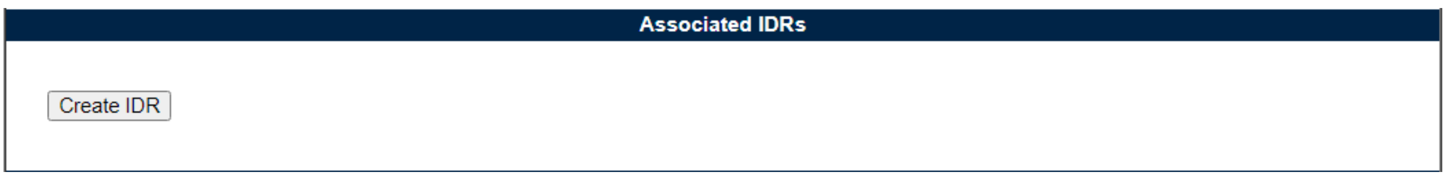
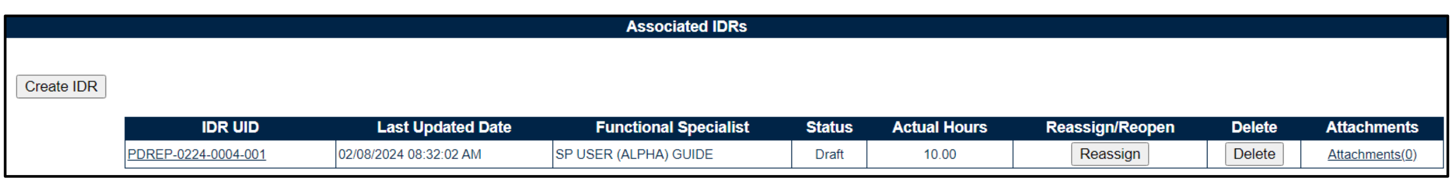


Figure 9.16

An Inspection Detail Report is initiated when the "Create IDR" button is selected. After the page refresh, the pending draft IDR is displayed. The IDR will remain in a pending draft status until the Inspection is registered as a Draft IDR through the "Save" action or is expunged by exiting the page before the "Save" button is used. Once saved, the IDR will populate in the Associated IDR table as seen in **Figure 9.17**. A minimum of one completed IDR must be applied to the Record to complete the DPE.

Note: *PDREP does not have an auto-save feature. If the "Save" button is not used, work will be lost!*



IDR UID	Last Updated Date	Functional Specialist	Status	Actual Hours	Reassign/Reopen	Delete	Attachments
PDREP-0224-0004-001	02/08/2024 08:32:02 AM	SP USER (ALPHA) GUIDE	Draft	10.00	Reassign	Delete	Attachments(0)

Figure 9.17

Associated Table Columns for **Figure 9.17**

- **Actual Hours:** Display of the Actual Hours entered within the Record.
- **Functional Specialist:** Also known as the "Record Owner", is the Functional Specialist responsible for the IDR. Automatically generated by the users' profile.
- **Last Updated Date:** The date the IDR was last updated based on the "Save" action.
- **IDR UID:** The 16-digit unique identifier of the Inspection Detail Report (IDR). The IDR UID is an extension of the Record UID by three digits and displays the sequence for which it was created (beginning with 001). This number automatically generates after the IDR is saved.
  - **Record UID Format:**
    - Plan's Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
    - *Example: PDREP - 0622 – 0001*
  - **IDR UID Format:**
    - Record UID + 3-digit sequential number of populations starting at 001.
    - *Example: PDREP - 0622 - 0001 - 001*
- **Status:** The status *(Draft/Complete)* of the IDR.

Associated Button and Hyperlink Functionality for **Figure 9.17**

- **Attachments (#):** This hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view, and delete attachments related to that of the IDR being worked. The number exhibited in parentheses indicates the number of attachments associated with the IDR. This number does not take into consideration attachments made to the Plan, Records, or other IDRs. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.
- **Create IDR:** Initiates creation of the Inspection Detail Report.
- **Delete:** The ability to delete an IDR is restricted by a user's access level as well as their Team Code and the IDR status. The Delete column populates for those users with an access level of Supervisor or higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). The ability to delete an IDR is dependent upon the IDR being in a draft status. The "Delete" button's functionality is restricted to those IDRs marked as "Complete" and will display as grayed/disabled in such instances.

  - Once the IDR has been completed (IDR Status=Complete), the ability to delete will be removed.
  - To delete an IDR, select the "Delete" button associated with the IDR to be expunged. A pop-up message will display requesting confirmation of the delete request.
    i. **OK:** Captures the request and eliminates the IDR and its contents.
    ii. **Cancel:** Refreshes the page, clears the delete request, and returns to the top of the Record.
- **IDR UID:** The unique identifier of the IDR. When selected this hyperlink will open the IDR to the appropriate display per the user selecting it (draft for the Record Owner & view for all other users).
- **Reassign/Reopen:** The Reassign/Reopen column displays either one button or the other depending on the IDR status. The Reassign button populates when the IDR is in a draft status, while "Reopen" displays for completed IDR's. This column only populates for users with Supervisor or higher access. Button functionality is enabled for users of the same Team Code as the Record Owner.

- To Reopen or Reassign an IDR, start by clicking the associated button for the IDR to be Reopened or Reassigned. A pop-up message will display requesting confirmation of the Reopen/Reassign request.
    i. **OK:** Captures the request and Reopens or Reassigns the IDR.
    ii. **Cancel:** Refreshes the page, clears the Reopen/Reassign request and returns to the top of the Record.

9.1.7 Evaluation (DPE/DSE)

Figure 9.18 shows the default view of the Evaluation section. This area is excluded from Deliverable Product Evaluation Records for Quality Assurance KCRs and is located within the associated IDR.

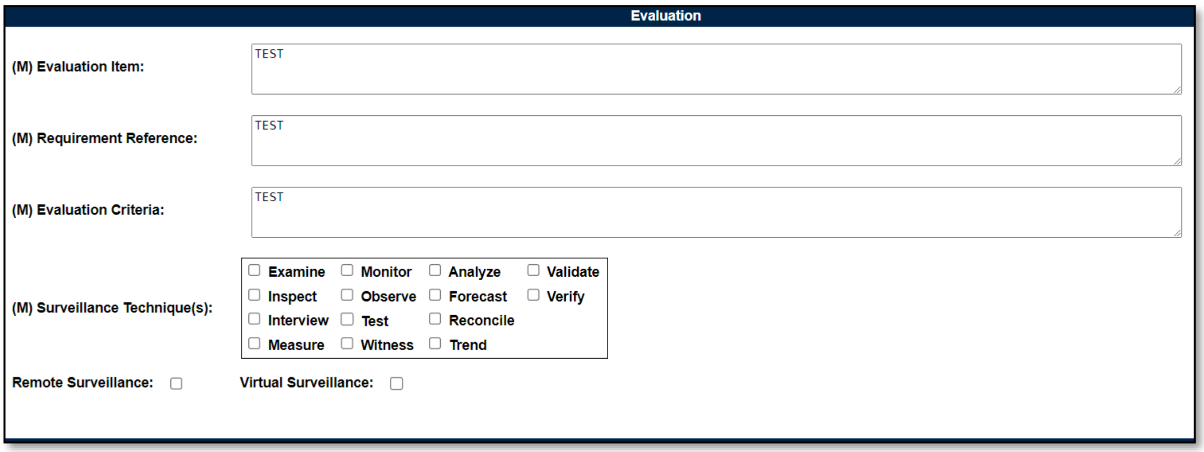


Figure 9.18

Associated Data Fields for **Figure 9.18**

- **(M) Evaluation Criteria**: A text box used to enter the evaluation criteria for the Record being worked *(max of 3,000 characters).*
- **(M) Evaluation Item:** A text box used to describe the item being evaluated for the Record being worked *(max of 3,000 characters).*
- **Remote Surveillance:** Check box identifying if the surveillance was remote.
- **(M) Requirement Reference:** A text box used to enter requirement references for the Record being worked *(max of 3,000 characters).*
- **(M) Surveillance Techniques:** Check boxes used to identify surveillance techniques used. A minimum selection of one is required to mark the Record "Complete".
- **Virtual Surveillance:** Check box identifying if the surveillance was virtual.

9.1.8 Conclusion (DPE/DSE)

Figure 9.19 shows the default view of the Conclusion section. This is where the Records' findings are entered.

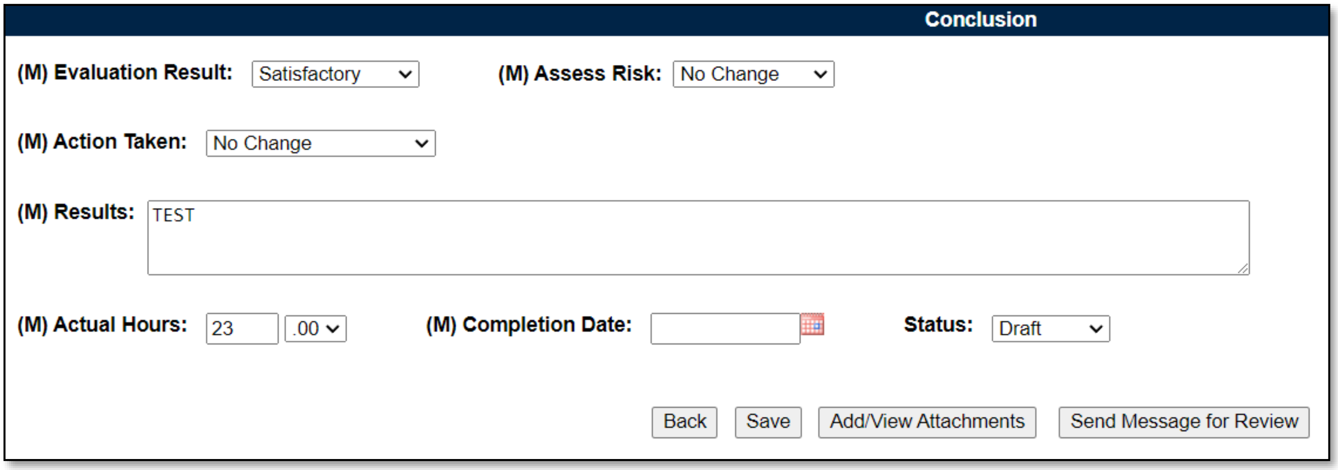


Figure 9.19

Associated Data Fields for **Figure 9.19**

- **(M) Action Taken:** A determination by the Record Owner as to what (if any) action is to be taken. A selection of "Increase Surveillance", "Decrease Surveillance" or "No Change" is made through the dropdown provided.
- **(M) Actual Hours:** Two fields used to enter the number of hours it took to conduct the surveillance as entered by the Record Owner. First field is related to hours and does not allow for negative hours or special characters. Second field is a dropdown related to minutes and defaults as ".00".

  <u>IDR Actual minute(s) dropdown values:</u>
  - .00 = On the hour
  - .25 = Quarter Past the hour
  - .50 = Half past the hour
  - .75 = Quarter until the next hour

- **(M) Assess Risk:** Assessment of the current Risk by the Record Owner. A selection of "Increase Risk", "Decrease Risk" or "No Change" is made through the dropdown provided. When "Increase Risk" or "Decrease Risk" is selected, the "Update KCR Risk" button populates as seen in **Figure 9.20**. By clicking on the "Update KCR Risk" button, the Record is automatically saved (draft status), while the user is navigated to the associated KCR's editable view with Record locking active.

Figure 9.20

- **(M) Completion Date:** A field used to Record the date the surveillance was completed. A future Completion Date may be used while the Record is in a "Draft" status. However, a Completion Date less than or equal to "todays date" is required before the Record can be marked "Complete".
- **(M) Evaluation Results:** Results of the evaluation as determined by the Record Owner. A selection of "Satisfactory" or "Un-Satisfactory" is made through the dropdown provided.
- **(M) Results:** A text box to describe the results of the inspection *(max of 100 characters).*
    - If the field gets identified with text that could be blocked by DISA, a pop-up with the text "PDREP has detected a disallowed character combination in your entry of "(M) Results" that may interfere with security compliance." will populate.
    - Click OK to continue then, if needed, a second pop-up will display informing you if there are any changes being applied to the field "Characters removed. Please check your entries for accuracy."
    - Click OK then review the text field for any updates as instructed by the pop-up.
- **Status:** The present status *(Draft/Complete)* of the Record. This dropdown defaults to a "Draft" status. When a user indicates the Record is complete, they will select "Complete" from the dropdown and click the "Save" button to capture their entry.
    - When the "Save" button is selected, a warning will populate notifying the user the Record is about to be marked as "Complete" and will no longer be editable (see **Figure 9.21**).
        - **OK:** Captures the request and marks the Record "Complete" when all mandatory fields have been satisfied. If not, an error message is generated at the top of the Record.
        - **Cancel:** Refreshes the page, clears the request to Complete the Record and returns to the top of the page.

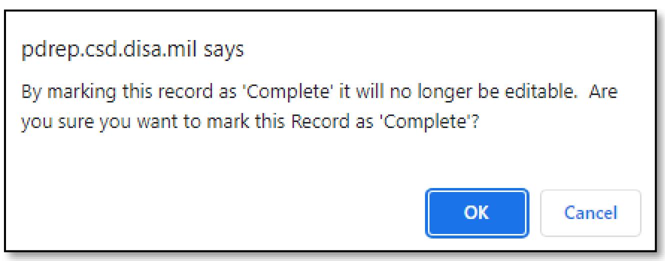


Figure 9.21

Associated Button Functionality for **Figure 9.19**

- **Add/View Attachments:** This button opens the "Upload Attachment(s)" page and allows users to upload, view, and delete attachments related to that of the Record being worked. Please note each Plan, Record and IDR has its own space for Attachments. This means applied documents are exclusive to the location they were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the "Save" button is selected, a warning will populate notifying the user the Record is about to be marked "Complete" and will no longer be editable. A selection of "OK" or "Cancel" will need to be used to clear the pop-up.
- **Send Message for Review:** Saves the Record in a draft status before opening to the correspondence page.

- **Update KCR Risk:** Navigates the user to the associated KCR for a Risk reassessment. When the “Update KCR Risk” button is used, the Record is automatically saved (draft status) while the user is navigated to the associated KCR’s editable view (with Record locking active).

Note: *PDREP does not have an auto-save feature. If the “Save” button is not used, work will be lost!*

9.2 DPE IDR

Deliverable Product Evaluation (DPE) Inspection Detail Reports (IDR) are attributed to those KCRs designated as Quality Assurance (NASA, NSEO & QA). For a DPE to be marked “Complete”, the Record must contain a minimum of one completed IDR.

9.2.1 Creating an IDR for DPE

Figure 9.22 shows the default view of the Associated IDRs section within the DPE. This section is only displayed on DPEs that have a KCR with a designated Functional Area of NASA, NSEO or Quality Assurance.

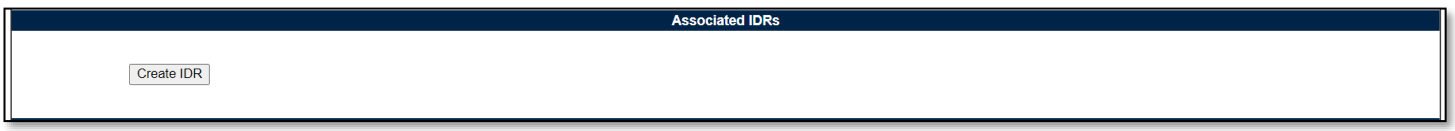


Figure 9.22

An Inspection Detail Report is initiated when the “Create IDR” button is selected. After the page refresh, the pending draft IDR displays. The IDR will remain in a pending draft status until the Inspection is either registered as a “Draft” through the “Save” action or is expunged by exiting the page before the “Save” button is used. Once saved, the IDR will display within the Associated IDR table located on the DPE Record. A minimum of one completed IDR must be applied to a DPE Record to mark the Record “Complete”.

Associated Button Functionality for **Figure 9.22**

- **Create (IDR):** This button processes the request to create a new IDR associated with the DPE Record. Once a Record has been generated and saved (draft status), a line item will appear on the IDR table.

9.2.2 Details (IDR for DPE)

Figure 9.23 shows the Details section of a DPE: IDR. This area will duplicate the higher-level DPE Record (also known as the "Parent Record").

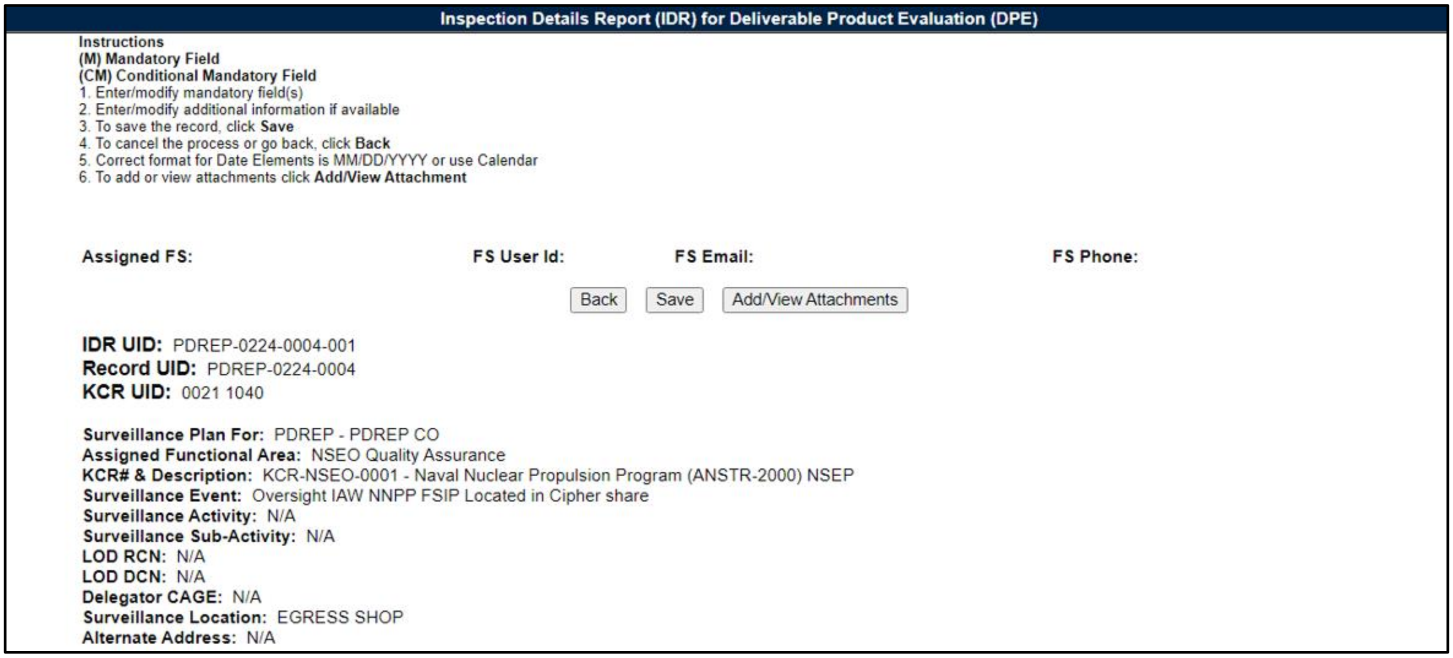


Figure 9.23

Associated Data Fields for **Figure 9.23**

- **Alternate Address:** Open text box for entering an alternate address *(max of 75 characters).*
- **Associated KCRs:** Display listing other KCR UID, KCR# & Description(s) for which the Record Owner is also an assigned FS.
- **Assigned FS:** Also known as the "Record Owner", is the Functional Specialist responsible for the IDR. Automatically generated by the users' profile.
- **Assigned Functional Area:** The Functional Area established and pulled from the KCR.
- **Delegation Number:** Text box to enter the LOD RCN.
- **FS Email:** Taken from the users' profile, the Email address of the assigned Functional specialist who will be conducting the inspection.
- **FS Phone:** Taken from the users' profile, the phone number of the assigned Functional Specialist who will be conducting the inspection.
- **FS User Id:** The User ID of the assigned Functional Specialist who will be conducting the inspection *(generally, it is the first initial of the users first name followed by the first 4 letters of the last name, sometimes ending in a number).*
- **KCR UID:** The 8-digit unique identifier of the KCR associated to the DPE Record.
- **KCR # & Description:** The KCR# and Description established and pulled from the KCR.
- **LOD RCN:** Record Control Number of the Incoming LOD associated to the KCR.
- **LOD DCN:** Document Control Number of the Incoming LOD associated to the KCR.
- **Delegator CAGE:** CAGE Code with the associated incoming LOD RCN/DCN from the KCR.
- **IDR UID:** The 16-digit unique identifier of the Inspection Detail Report. The IDR UID is an extension of the Record UID by three digits and displays the sequence for which it was created (beginning with 001). This number automatically generates after the IDR is saved.

- **Record UID Format:**
    - Plan's Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
    - *Example: PDREP - 0622 – 0001*
- **IDR UID Format:**
    - Record UID + 3-digit sequential number of populations starting at 001.
    - *Example: PDREP - 0622 - 0001 - 001*

- **Record UID:** The 13-digit unique identifier pulled from the DPE Record.
- **Surveillance Activity:** The Surveillance Activity established and pulled from the KCR. The field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **Surveillance Event:** The Event established and pulled from the KCR. The field will display as "N/A" when lacking a Surveillance Event in the KCR.
- **Surveillance Location:** Displays the associated KCR location(s) as established in the KCR and selected in the DPE Record.
- **Surveillance Plan For:** The CAGE Code and Company Name of the contractor to whom the Surveillance Plan is attributed.
- **Surveillance Sub-Activity:** The Surveillance Sub-Activity established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Sub-Activity in the KCR.

Associated Button Functionality for **Figure 9.23**

- **Add/View Attachments:** This button opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the IDR being worked. Please note each Plan, Record and IDR has its own space for attachments. This means applied documents are exclusive to the location they were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the "Save" button is selected, a warning will populate notifying the user the IDR is about to be marked as "Complete" and will no longer be editable. A selection of "OK" or "Cancel" will need to be used to clear the pop-up.

9.2.3 Applicable End Item (IDR for DPE)

Figure 9.24 shows the default view of the Applicable End Item NSN/Part/Serial Numbers section. The End Item dropdown list populates End Items selected at the DPE Record Level. A minimum of one End Item must be applied to complete the IDR.

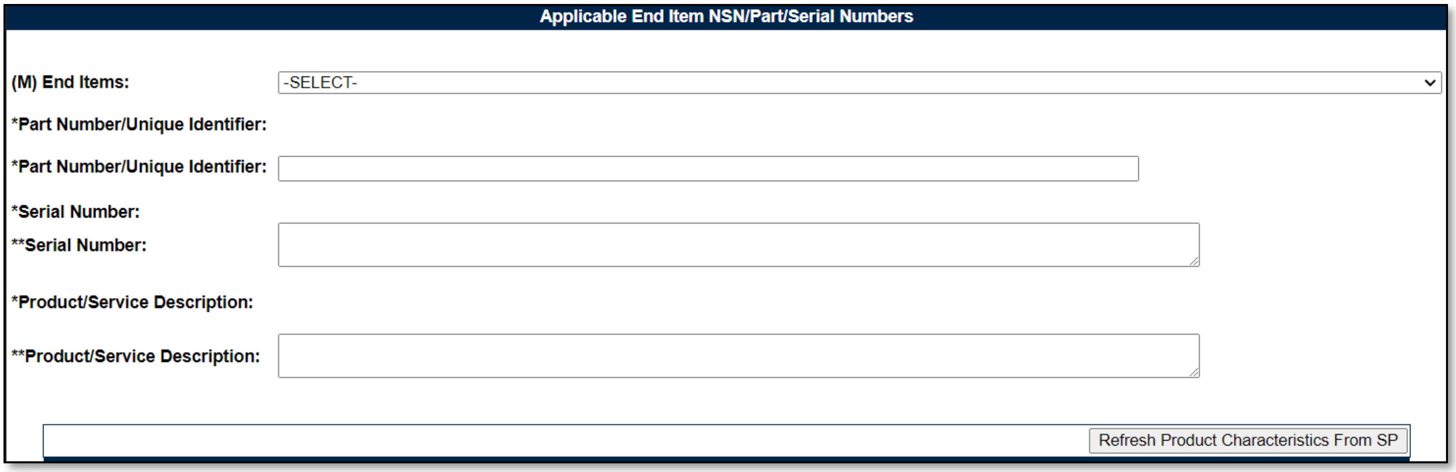


Figure 9.24

Associated Data Fields for **Figure 9.24**

- **(M) End Item:** Restricted to one selection. This dropdown populates those End Items as selected in the DPE. Selection will display values entered on the DPE for Part Number/Unique Identifier and Serial Number fields as shown in **Figure 9.24**.
- ***Part Number/Unique Identifier:** Auto-populated display based on what resides at the DPE Record level for Part Number/Unique Identifier. Asterisk (*) denotes content established at the Record Level. This field will be blank when the End Item lacks a Part Number/Unique Identifier in the DPE.
- ****Part Number/Unique Identifier:** Text box to enter additional Part Number/Unique Identifier for the IDR level *(max of 75 characters).*
- ***Product/Service Description:** Auto-populated display based on what resides at the DPE Record Level for Product/Service Description. Asterisk (*) denotes content established at the Record Level. Field will be blank when the End Item lacks a Product/Service Description in the DPE.
- ****Product/Service Description:** Text box to enter additional Product/Service Description for the IDR level *(max of 200 characters).*
- ***Serial Number:** Auto-populated display based on what resides at the DPE Record Level for Serial Number. Asterisk (*) denotes content established at the Record Level. Field will be blank when the End Item lacks a Serial Number in the DPE.
- ****Serial Number:** Text box to enter additional Serial Number for the IDR Level *(max of 1,000 characters).*

Note: Single asterisk indicates Record Level whereas double asterisk denotes IDR level. An example of this may be seen in **Figure 9.25**.

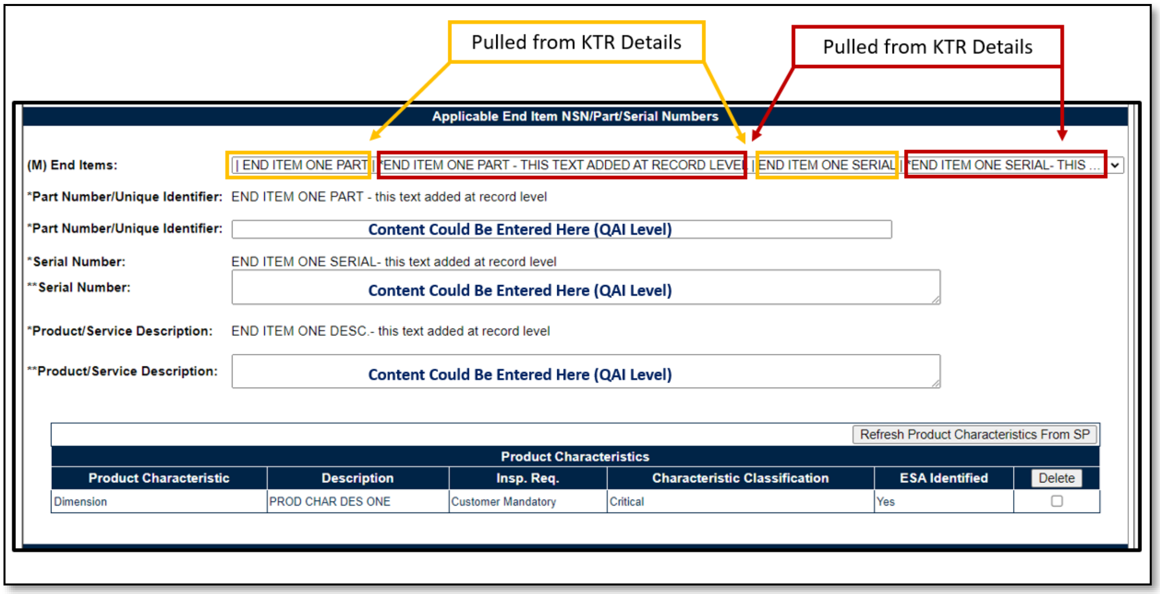


Figure 9.25

9.2.4 Product Characteristics (IDR for DPE)

When an End Item contains Product Characteristics and is selected from the dropdown, the associated Product Characteristics Table will display beneath the End Item identifier fields of Part Number/Unique Identifier, Serial Number & Product/Service Description.

Associated Product Characteristic Table Columns for **Figure 9.25**

- **Characteristic Classification:** Auto-populated display based on the selection made for the End Item's Characteristic Classification dropdown located on the KTR Details page. This field will be blank when the End Item lacks a Characteristic Classification.
- **Description:** Auto-populated display based on the contents entered for the End Item's Description text box located on the KTR Details page. This field will be blank when the End Item lacks a Description.
- **ESA Identified:** Auto-populated display based on the selection made for the End Item's ESA Identified dropdown located on the KTR Details page. This field will be blank when the End Item lacks an ESA Identified.
- **Insp. Req.:** Auto-populated display based on the selection made for the End Item's Insp. Req. dropdown located on the KTR Details page. Field will be blank when the End Item lacks an Insp. Req.
- **Product Characteristics:** Auto-populated display based on the selection made for the End Item's Product Characteristic dropdown located on the KTR Details page. This field will be blank when the End Item lacks a Product Characteristic.

Associated Button Functionality for **Figure 9.25**

- **Delete:** Removes the selected Product Characteristic from the Product Characteristic Table. This action occurs when the corresponding box is selected and the "Delete" button is clicked. A pop-up message will display requesting confirmation of the delete request as seen in **Figure 9.26**.
    - **OK:** Captures the request and eliminates the Product Characteristic from the table.
    - **Cancel:** Refreshes the page and clears the delete request.

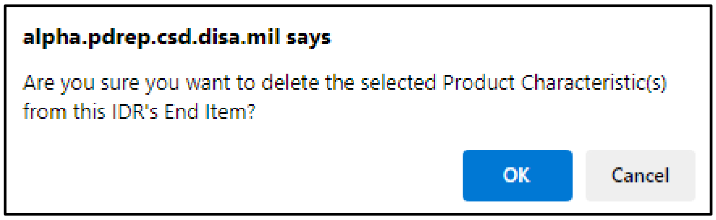


Figure 9.26

- **Refresh Product Characteristic Table:** This button refreshes the Product Characteristic Table to match that of the KTR Details Product Characteristic Table of the same End Item.

9.2.5 General Information (IDR for DPE)

Figure 9.27 shows the default view of the General Information section for the IDR for DPE.

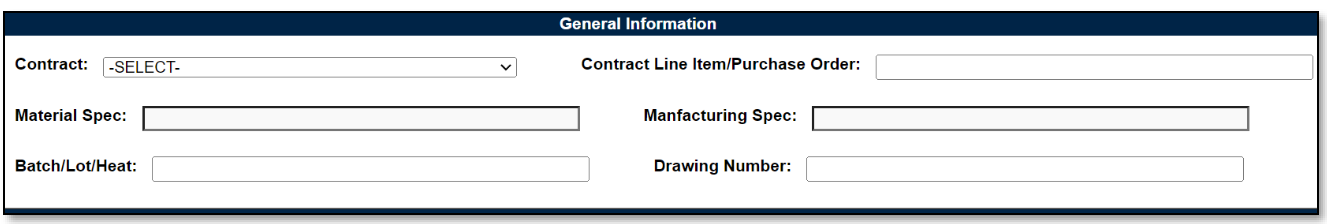


Figure 9.27

Associated Data Fields for **Figure 9.27**

- **Batch/Lot/Heat:** Text box to enter the Batch, the Lot, or the Heat related to the IDR *(max of 50 characters).*
- **Contract**: Restricted to one selection, this dropdown displays Contracts applied to the DPE Record. The dropdown will be blank when a contract has not been applied to the DPE.
- **Contract Line Item/Purchase Order:** Text box to the selected Contract's Line Item or Purchase Order for the IDR *(max of 50 characters).*
- **Drawing Number:** Text box to enter the Drawing Number related to the IDR *(max of 50 characters).*
- **Manufacturing Spec:** Text box to enter Manufacturing Specifications related to the IDR *(max of 50 characters).*
- **Material Spec:** Text box to enter Material Specifications related to the IDR *(max of 50 characters).*

9.2.6 Inspection Criteria (IDR for DPE)

Figure 9.28 shows the default view of the Inspection Criteria section for the IDR for DPE.

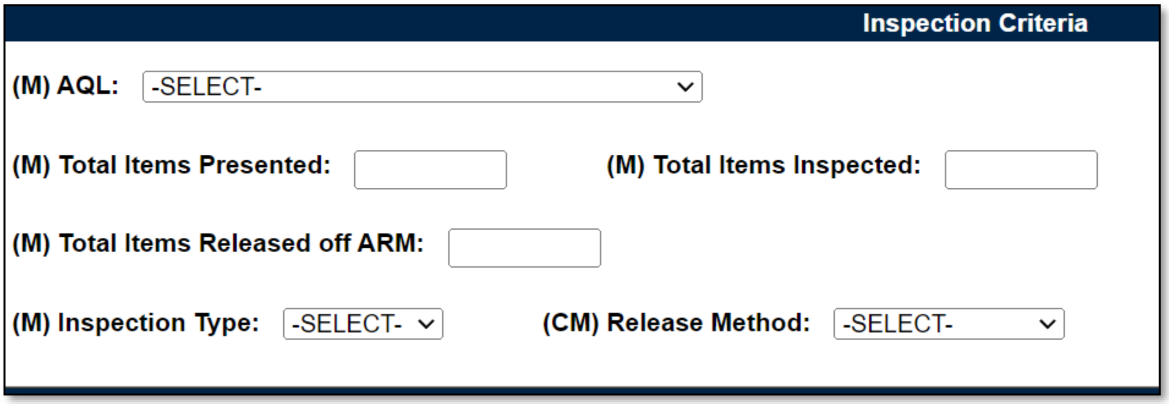


Figure 9.28

Associated Data Fields for **Figure 9.28**

- **AQL:** Select the applicable AQL from the dropdown provided (**Figure 9.29**) related to the appropriate level of oversight of a contractor to meet contractual requirements.

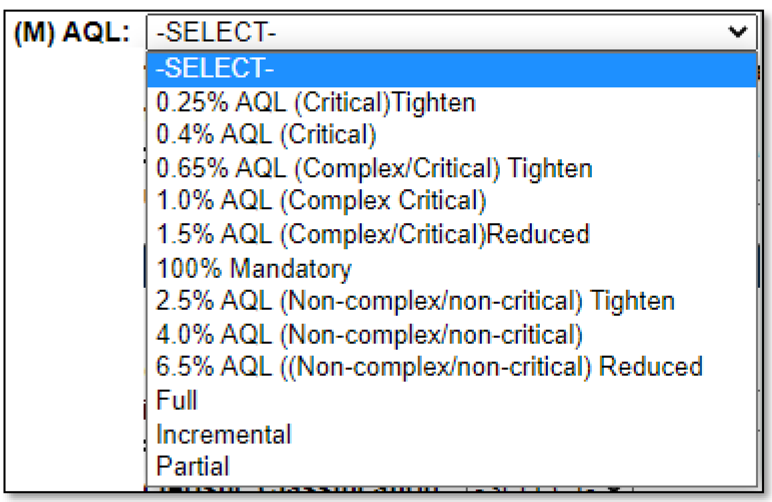


Figure 9.29

- **(M) Inspection Type:** Select the Inspection type ("In-Process" or "Final") from the dropdown provided. When Inspection Type is "Final", the Release Method becomes a mandatory data field.
- **(CM) Release Method**: Conditional Mandatory data field. This data field must have an entry when the "(M) Inspection Type" has a selection of "Final". Selections for release method are:
  - ARP
  - CoC
  - Receiving Report
- **Remote Surveillance:** Check box identifying if the surveillance was remote.

- **(M) Total Items Inspected:** Text box to enter the numeric count of Total Items Inspected for the IDR. Special characters and letters are restricted. This number must be equal to or smaller than the number of "Total Items Presented" *(max of 7 characters).*
- **Total Items Presented:** Text box to enter the numeric count of Total Items Presented for the IDR. Special characters and letters are restricted *(max of 7 characters).*
- **(M) Total Items Released off ARM:** Text box to enter the numeric count of Total Items Released off ARM for the IDR. Special characters and letters are restricted. This number must be equal to or smaller than the number of "Total Items Presented" *(max of 7 characters).*
- **Virtual Surveillance:** Check box identifying if the surveillance was virtual.

9.2.7 Conclusion (IDR for DPE)

Figure 9.30 shows the default view of the Conclusion section for the IDR for a DPE.

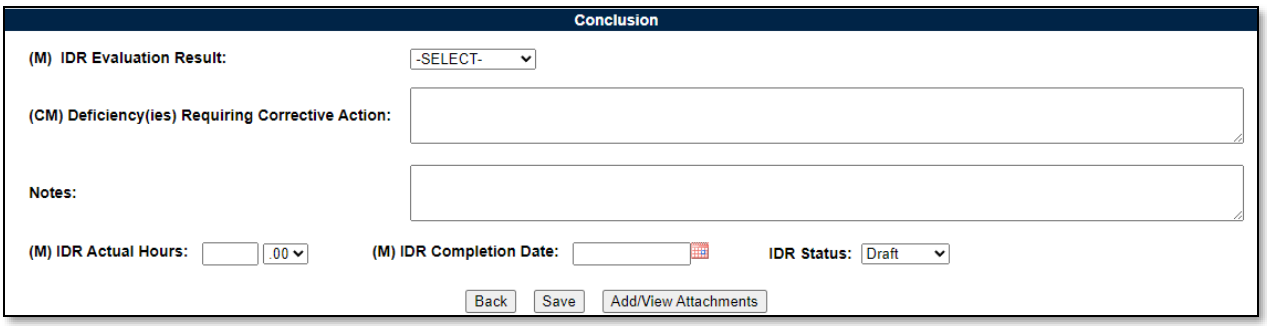


Figure 9.30

Associated Data Fields for **Figure 9.30**

- **(CM) Deficiency(ies) Requiring Corrective Action:** A mandatory text box used to enter comments related to Deficiencies requiring a Corrective Action when Evaluation Results are "Un-Satisfactory" for the IDR being worked *(max of 2,000 characters).*
- **Notes:** Open text box *(max of 3,000 characters).*
- **(M) IDR Actual Hours:** Two fields used to enter the number of hours it took to conduct the inspection as entered by the Record Owner. First field is related to hours and does not allow for negative hours or special characters. Second field is a dropdown related to minutes and defaults as ".00".

  IDR Actual minute(s) dropdown values:
  - .00 = On the hour
  - .25 = Quarter Past the hour
  - .50 = Half past the hour
  - .75 = Quarter till the next hour

- **(M) IDR Completion Date:** A field used to Record the date the inspection was completed. A future Completion Date may be used while the IDR is in a "Draft Status". However, a Completion Date less than or equal to "todays date" is required before the IDR can be marked "Complete".
- **(M) IDR Evaluation Results:** Results of the evaluation as determined by the Record Owner. A selection of "Satisfactory" or "Un-Satisfactory" is made through the dropdown provided.

- **IDR Status:** The present status *(Draft/Complete)* of the IDR. This dropdown defaults to a "Draft" status. When a user indicates the IDR is complete, they will select "Complete" from the dropdown and click the "Save" button to capture their entry.
    - When the "Save" button is clicked, a warning will populate notifying the user the IDR is about to be marked as "Complete" and will no longer be editable.
        - **OK:** Captures the request and marks the Record Complete (when all mandatory fields have been satisfied). If not, an error message is generated at the top of the IDR.
        - **Cancel:** Refreshes the page, clears the request to Complete the IDR and returns to the top of the page.

Associated Button Functionality for **Figure 9.30**

- **Add/View Attachments:** This button opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to the IDR being worked. Please note each Plan, Record and IDR has its own space for Attachments. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page (DPE Record).
- **Save:** This button may be used at any time to save the contents of the page. When the "Save" button is selected, a warning will populate notifying the user the Record is about to be marked as "Complete" and will no longer be editable. A selection of "OK" or "Cancel" will need to be used to clear the pop-up.

10 SPE/PE

The SP tool currently supports two Record types:

1. Deliverable Product Evaluation (DPE)/Deliverable Service Evaluation (DSE) (**Section 9**)
2. System Process Evaluation (SPE)/Progress Evaluation (PE) (**Section 10**)

Though System/Process Evaluation (SPE) & Progress Evaluation (PE) share the same display, there are a few differences.

i. Evaluation Section will be absent for SPEs with IDRs
ii. Page Title/Header
    (states if the Record type is a SPE or a PE)
iii. SPEs can house IDRs.
    (exclusive to Quality Assurance, Aircraft Operations, and Contract Safety KCRs)

10.1 Creating a SPE or PE

Since Record creation is restricted to one Record type, the creation of a SPE or a PE starts at the KCR level with the selection of the Surveillance Category data field (**Figure 10.1**).

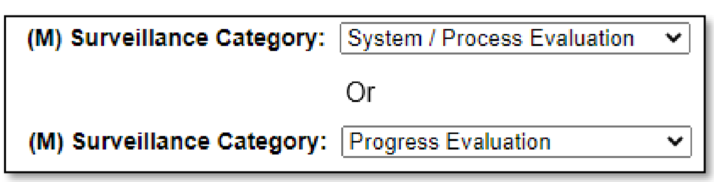


Figure 10.1

Once the Record type has been established (within the KCR), a Record may be created one of two ways (traditionally or on-demand).

Traditional Records are generated through the population of occurrences on the Scheduler. Select the “New” button to begin the creation of a draft SPE/PE Record.

On-Demand Records are created through the Surveillance Records area of the Records Page. After locating the desired KCR for which the Record needs to be created and selecting the “Year/Total Records” hyperlink, click the “Create An On-Demand Record” button to open the draft creation of the On-Demand Record for a SPE/PE.

10.1.1 Record Details (SPE/PE)

Figure 10.2 shows the Details section of a SPE/PE Record.

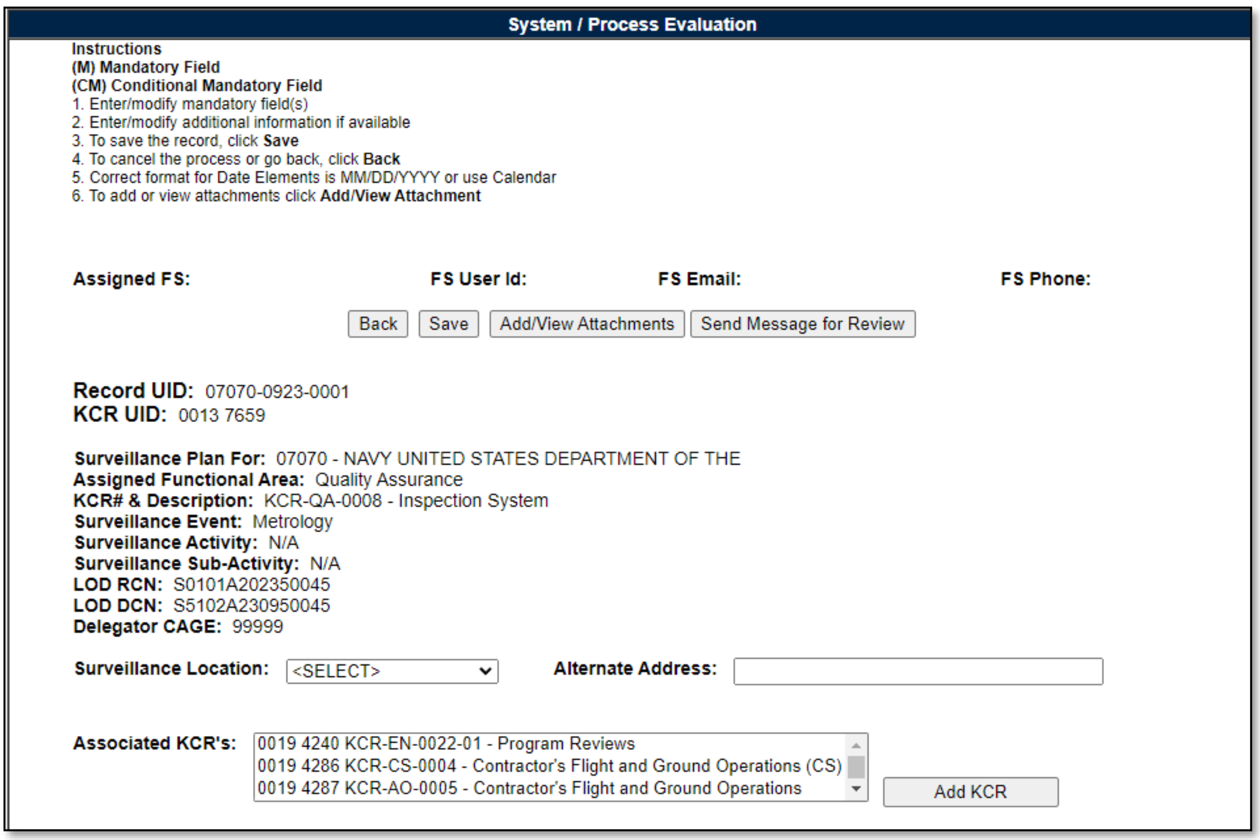


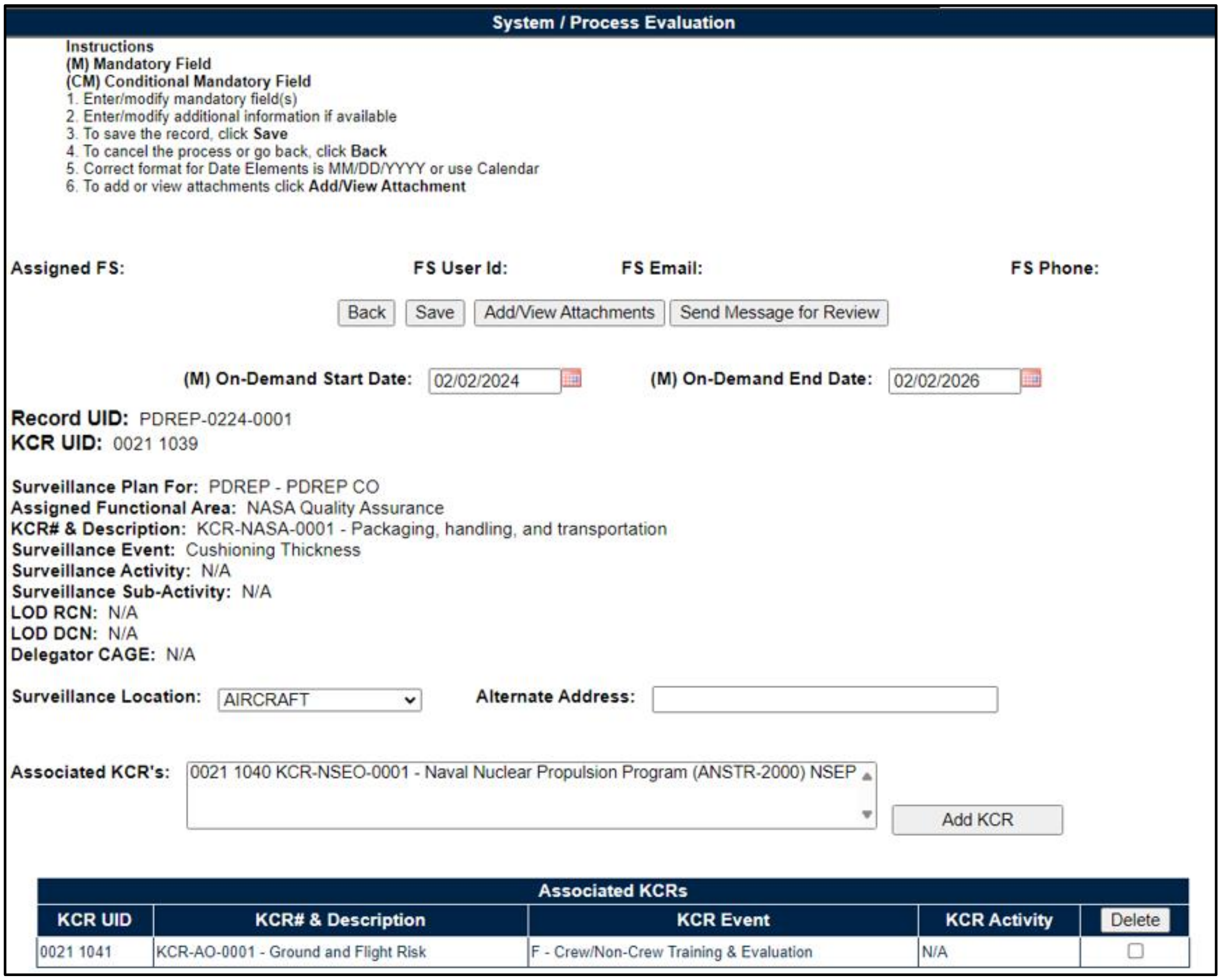
Figure 10.2

Associated Data Fields for **Figure 10.2**

- **Alternate Address:** Open text box for entering an alternate address *(max of 75 characters).*
- **Assigned FS:** Also known as the “Record Owner”, this is the Functional Specialist responsible for the Record and is automatically generated by the users’ profile.
- **Assigned Functional Area:** The Functional Area established and pulled from the KCR.
- **Associated KCRs:** A dropdown listing other KCR UID, KCR# & Description(s) for which the Record Owner is also an assigned FS. This list is restricted to those KCRs within the same

Surveillance Plan as the Record being created. When an Associated KCR is selected from the dropdown and the "Add KCR" button is used, the KCR will be added to the Associated KCR Table.
    - Completed KCRs will not display in the dropdown.
    - Dropdown is hidden when all values have been applied to the table.
    - Users may make multi-selections from the dropdown provided.

- **Associated KCR Table:** List of Associated KCRs that have been selected and added to the Record from the Associated KCR dropdown.
    - A completed KCR may be removed from the Associated KCR table display list, but it cannot be added.
    - **Figure 10.3** shows a display of the Associated KCR table.
    - In such instances where a KCR is no longer Warranted, the line item of the KCR will be grayed out.
    - KCRs may be removed by selecting the corresponding box under "Delete" and selecting the "Delete" button.
    - Though the Associated KCR table can accommodate multiple selections, it will be hidden until a KCR is applied.
    - When an Associated KCR is marked complete, the line item of the KCR will be grayed out, and the KCR will be moved to the bottom of the table's display (see **Figure 10.3**).
- **Delegation Number:** Text Box to enter the LOD RCN.
- **FS Email:** Taken from the users' profile, this is the Email address of the assigned Functional specialist who will be conducting the surveillance.
- **FS Phone:** Taken from the users' profile, this is the phone number of the assigned Functional Specialist who will be conducting the surveillance.
- **FS User Id:** The User ID of the assigned Functional Specialist who will be conducting the surveillance *(generally the first initial of the users first name followed by the first 4 letters of the last name, sometimes ending in a number).*
- **KCR UID:** The 8-digit unique identifier of the KCR for which the Record is associated with.
- **KCR # & Description:** The KCR# and Description established and pulled from the KCR.
- **LOD RCN:** Record Control Number of the Incoming LOD associated to the KCR.
- **LOD DCN:** Document Control Number of the Incoming LOD associated to the KCR.
- **Delegator CAGE:** CAGE Code with the associated incoming LOD RCN/DCN from the KCR.
- **Record UID:** The 13-digit unique identifier of the Record. The Record UID will automatically generate when the Record is saved.
    - **Record UID Format:**
        - Plan's Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
        - *Example: PDREP - 0622 – 0001*
- **Surveillance Activity:** The Surveillance Activity established and pulled from the KCR. This field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **Surveillance Event:** The Event established and pulled from the KCR. This field will display as "N/A" when lacking a Surveillance Event in the KCR.
- **Surveillance Location:** Restricted to a single selection, this dropdown displays the associated KCR location(s) as established in the KCR.
- **Surveillance Plan For:** The CAGE Code and Company Name of the contractor to whom the Surveillance Plan is attributed.
- **Surveillance Sub-Activity:** The Surveillance Sub-Activity established and pulled from the KCR. This field will display as "N/A" when lacking a Surveillance Sub-Activity in the KCR.



System / Process Evaluation

Instructions
(M) Mandatory Field
(CM) Conditional Mandatory Field
1. Enter/modify mandatory field(s)
2. Enter/modify additional information if available
3. To save the record, click **Save**
4. To cancel the process or go back, click **Back**
5. Correct format for Date Elements is MM/DD/YYYY or use Calendar
6. To add or view attachments click **Add/View Attachment**

Assigned FS: **FS User Id:** **FS Email:** **FS Phone:**

Back | Save | Add/View Attachments | Send Message for Review

(M) On-Demand Start Date: 02/02/2024 **(M) On-Demand End Date:** 02/02/2026

Record UID: PDREP-0224-0001
KCR UID: 0021 1039

Surveillance Plan For: PDREP - PDREP CO
Assigned Functional Area: NASA Quality Assurance
KCR# & Description: KCR-NASA-0001 - Packaging, handling, and transportation
Surveillance Event: Cushioning Thickness
Surveillance Activity: N/A
Surveillance Sub-Activity: N/A
LOD RCN: N/A
LOD DCN: N/A
Delegator CAGE: N/A

Surveillance Location: AIRCRAFT **Alternate Address:**

Associated KCR's: 0021 1040 KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP

Add KCR

Associated KCRs

KCR UID	KCR# & Description	KCR Event	KCR Activity	Delete
0021 1041	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	N/A	☐

Figure 10.3

Associated Table Columns for **Figure 10.3**

- **KCR Activity:** The Activity of the ***Associated*** KCR for which the Record Owner is also an assigned FS. This field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **KCR Event:** The Event of the ***Associated*** KCR for which the Record Owner is also an assigned FS. This field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **KCR UID:** The 8-digit unique identifier of the ***Associated*** KCR for which the Record Owner is also an assigned FS.
- **KCR# & Description:** The KCR# and Description of the ***Associated*** KCR for which the Record Owner is also an assigned FS.

Associated Button Functionality for **Figure 10.3**

- **Add KCR:** Applies the selected KCR to the Associated KCR table.
- **Add/View Attachments:** This button opens the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Record being worked.
  - Please note each Plan, Record and IDR has its own space for Attachments. This means applied documents are exclusive to the location they were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Delete:** Removes the Associated KCR from the Table and reapplies to the Associated KCR dropdown. Action occurs when the corresponding box is selected and the "Delete" button is clicked.

- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected, a warning will populate notifying the user the Record is about to be marked “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.
- **Send Message for Review:** Saves the Record as a draft status before opening the Correspondence Page. After the refresh, messages may be sent to other Surveillance Plan users.

10.1.2 Applicable Programs (SPE/PE)

Figure 10.4 shows the default view of the Applicable Programs section. The Program Name dropdown list populates Programs added to the Surveillance Plan.

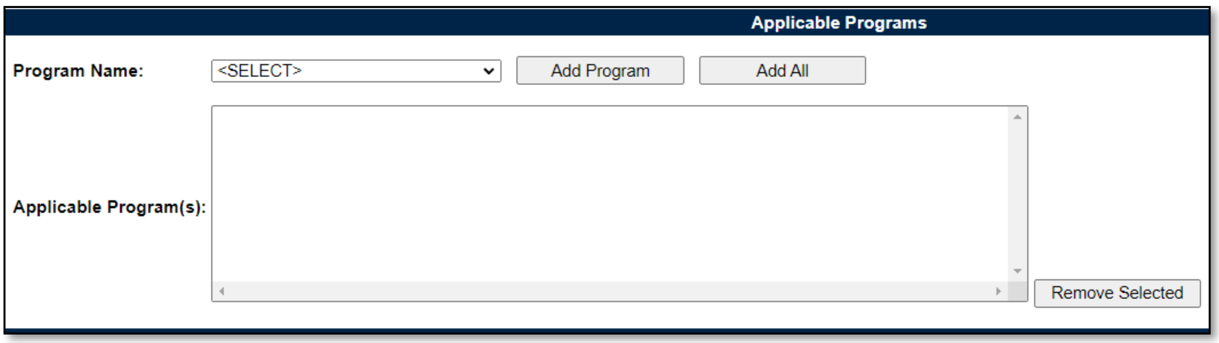


Figure 10.4

Select a corresponding Program from the dropdown provided as shown in **Figure 10.5**. Click the “Add Program” button to apply selection to the Applicable Program(s) list box.

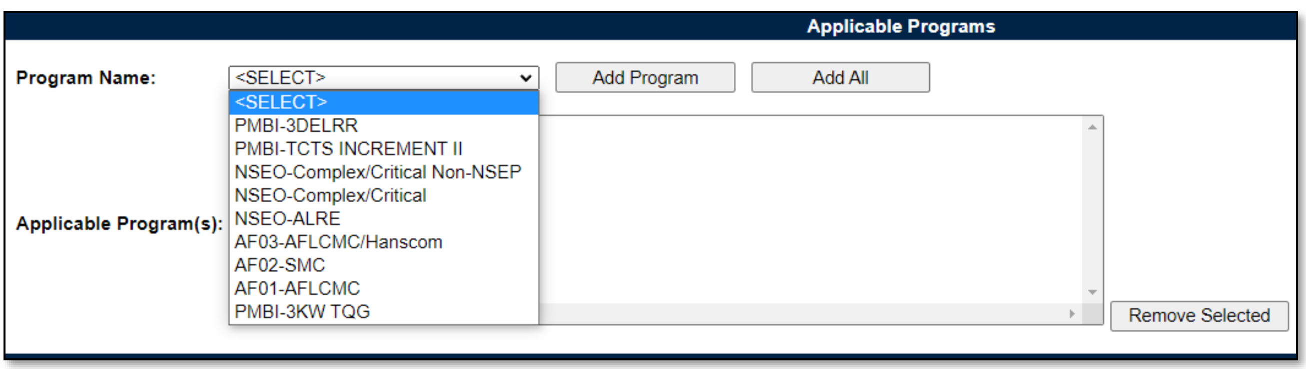


Figure 10.5

The “Add All” button applies all Programs listed in the dropdown to the Applicable Programs(s) list box. When used, the page will refresh with the contents of the dropdown displaying in the list box and the Program Name dropdown empty. An example of this can be seen in **Figure 10.6**.

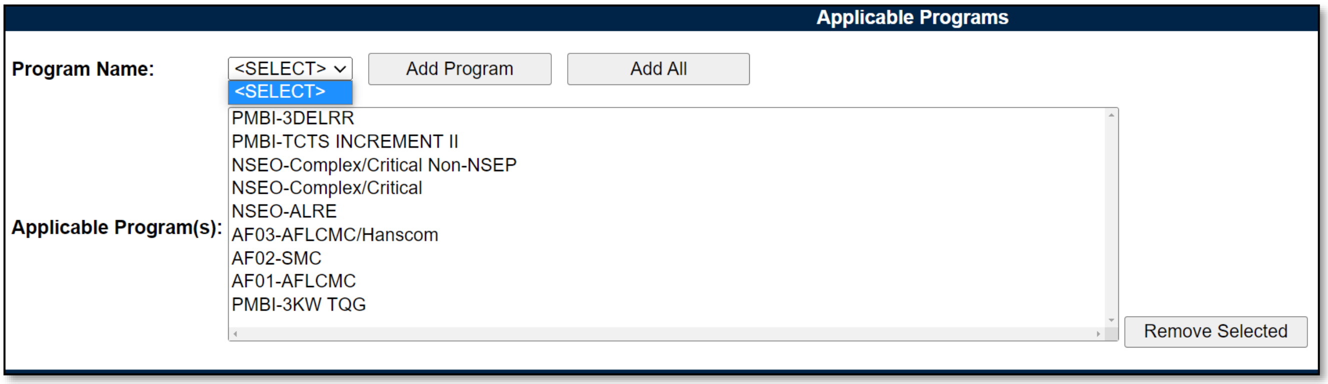


Figure 10.6

Associated Data Fields for **Figure 10.6**

- **Applicable Program(s):** List box containing the Programs selected as Applicable to the Record being worked.
- **Program Name:** Dropdown list comprised of Programs housed within the KTR Details. Archived Programs will not populate in the dropdown.

Associated Button Functionality for **Figure 10.6**

- **Add All:** This button adds the listed Programs displayed in the dropdown to the Applicable Program(s) list box. When used, the Program Name dropdown list will be empty.
- **Add Program:** This button adds the selected Program to the Applicable Program(s) list box. When applied, the selected Program will no longer populate in the dropdown.
- **Remove Selected:** Removes the selected item from the Applicable Program(s) list box and returns it to the Program Name dropdown.

10.1.3 Applicable Contracts (SPE/PE)

Figure 10.7 shows the default view of the Applicable Contracts section. The Contract Number dropdown list populates Contracts added to the Surveillance Plan.

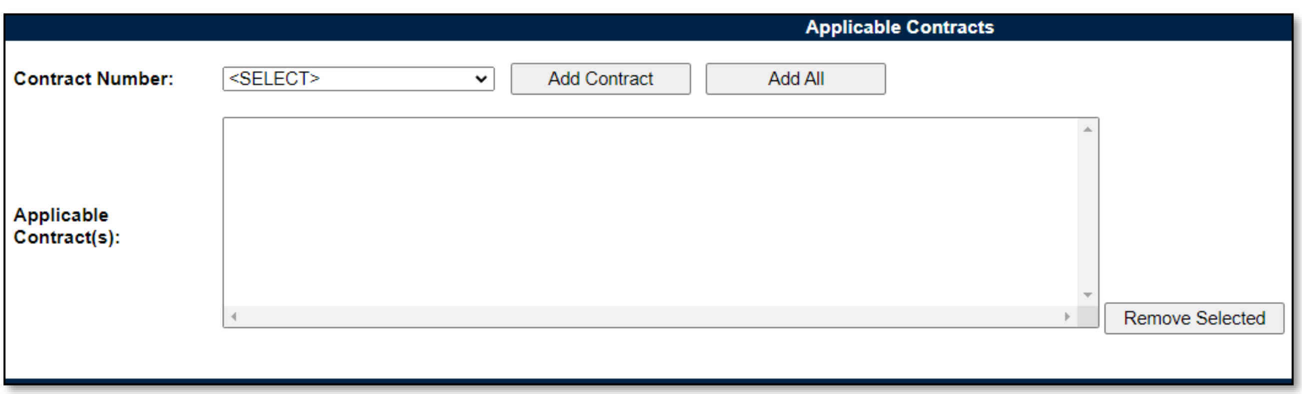


Figure 10.7

Select a corresponding Contract from the dropdown provided as shown in **Figure 10.8**. Click the “Add Contract” button to apply selection to the Applicable Contract(s) list box.

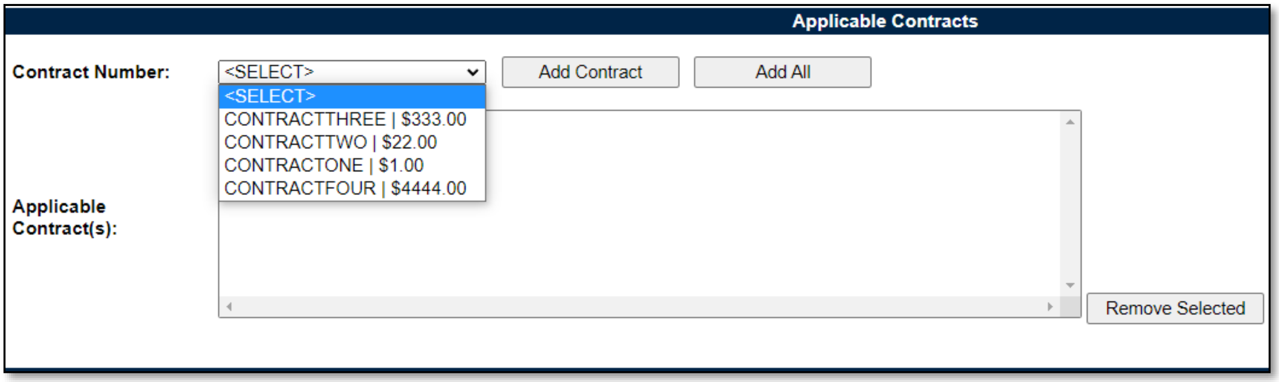


Figure 10.8

The “Add All” button applies the Contracts listed in the dropdown to the Applicable Contract(s) list box. When used, the page will refresh with the contents of the dropdown displaying in the list box with the Contract Number dropdown empty. An example of this can be seen in **Figure 10.9**.

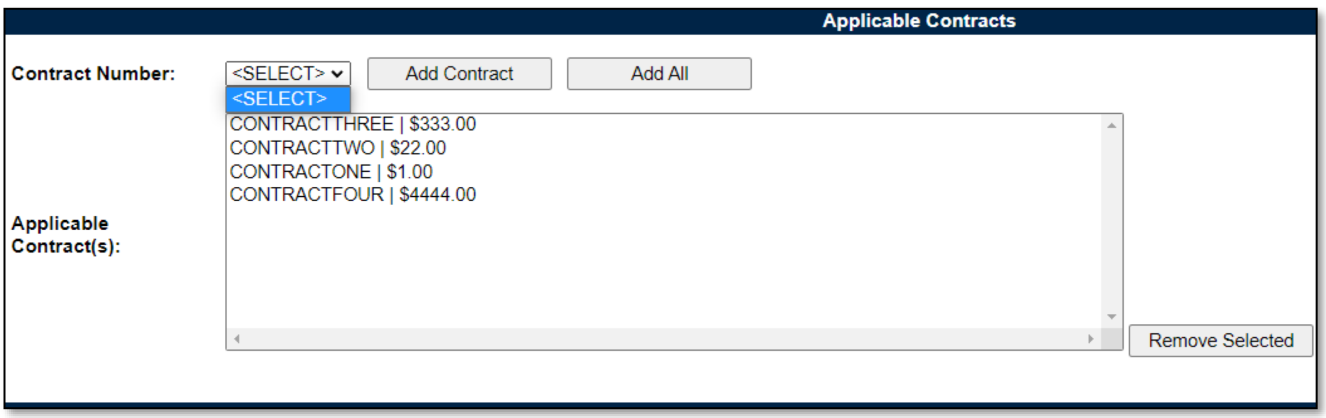


Figure 10.9

Associated Data Fields for **Figure 10.9**

- **Applicable Contract(s):** List box containing the Contracts selected as Applicable to the Record being worked.
- **Contract Number:** Dropdown list comprised of Contracts housed within the KTR Details. Archived Contracts will not populate in the dropdown.

Associated Button Functionality for **Figure 10.9**

- **Add All:** This button adds the listed Contracts displayed in the dropdown to the Applicable Contract(s) list box. When used, the Contract Number dropdown list will be empty.
- **Add Contracts:** This button adds the selected Contracts to the Applicable Contract(s) list box. When applied, the selected Contract will no longer populate in the dropdown.
- **Remove Selected:** Removes the selected item from the Applicable Contract(s) list box and returns it to the Contract Number dropdown.

10.1.4 KTR Information (SPE/PE)

Figure 10.10 shows a dropdown of available POCs who have been added to the KTR Details page. This is where the Record houses the point(s) of contact for the KTR.

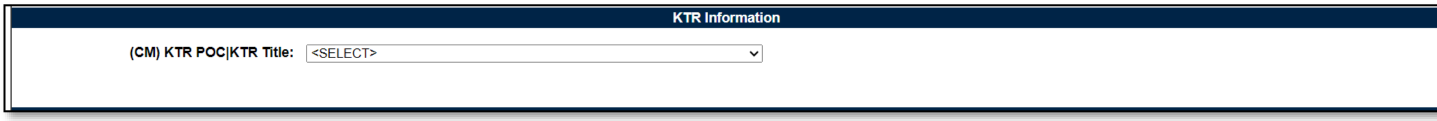


Figure 10.10

In the conclusion section, if the Evaluation Result is “Un-Satisfactory”, then the KTR POC selection is required. If no KTR POC is available, the user must go back to the KTR Details page and enter at least one KTR POC.

10.1.5 Associated IDRs (SPE)

Figure 10.11 shows the default view of the Associated Inspection Details Report (IDR) section. This area is exclusive to certain functional areas (AO, CS, NASA, NSEO, & QA) for System Process Evaluation (and Deliverable Product Evaluation) Record types. This is where IDRs are created and housed for the associated S/PE (and DPE) Record. The figures and explanations of this section serve as an overview of the IDR area outside of the Inspection.

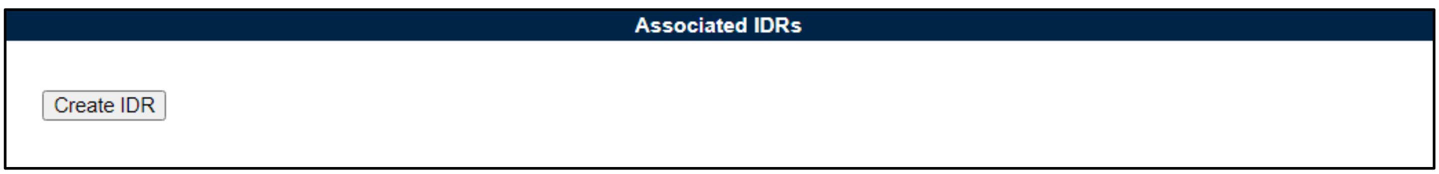
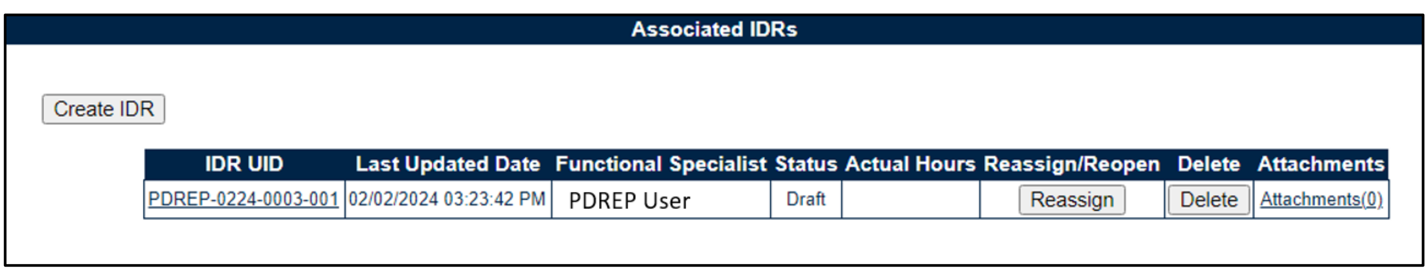


Figure 10.11

An Inspection Detail Report is initiated when the “Create IDR” button is selected. After the page refresh, the pending draft IDR is displayed. The IDR will remain in a pending draft status until the Inspection is registered as a Draft IDR through the “Save” action or is expunged by exiting the page before the “Save” button is used. Once saved, the IDR will populate in the Associated IDR table as seen in **Figure 10.12**. A minimum of one completed IDR must be applied to the Record to complete the SPE.

Note: *PDREP does not have an auto-save feature. <u>If the “Save” button is not used, work will be lost!</u>*



IDR UID	Last Updated Date	Functional Specialist	Status	Actual Hours	Reassign/Reopen	Delete	Attachments
PDREP-0224-0003-001	02/02/2024 03:23:42 PM	PDREP User	Draft		Reassign	Delete	Attachments(0)

Figure 10.12

Associated Table Columns for **Figure 10.12**

- **Actual Hours:** Display of the Actual Hours entered within the Record.
- **Functional Specialist:** Also known as the "Record Owner", this is the Functional Specialist responsible for the IDR. Automatically generated by the users' profile.
- **Last Updated Date:** The date the IDR was last updated based on the "Save" action.
- **IDR UID:** The 16-digit unique identifier of the Inspection Detail Report (IDR). The IDR UID is an extension of the Record UID by three digits and displays the sequence for which it was created (beginning with 001). This number automatically generates after the IDR is saved.
  - **Record UID Format:**
    - Plan's Five-digit CAGE Code + Record's two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
    - *Example: PDREP - 0622 – 0001*
  - **IDR UID Format:**
    - Record UID + 3-digit sequential number of populations starting at 001.
    - *Example: PDREP - 0622 - 0001 - 001*
- **Status:** The present status *(Draft/Complete)* of the IDR.

Associated Button and Hyperlink Functionality for **Figure 10.12**

- **Attachments (#):** This hyperlink opens the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the IDR being worked. The number exhibited in parentheses indicates the number of attachments associated with the IDR. This number does not take into consideration attachments made to the Plan, Records or other IDRs. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.
- **Create IDR:** Initiates creation of an Inspection Detail Report.
- **Delete:** The ability to delete an IDR is restricted by a user's access level as well as their Team Code and the IDR status. The Delete column populates for those users with an access level of Supervisor or higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). And the ability to delete an IDR is also dependent upon the IDR being in a draft status. The "Delete" button's functionality is restricted to those IDRs marked as "Complete" and will display as grayed/disabled in such instances.
  - Once the IDR has been completed, (IDR Status=Complete) the ability to delete will be removed.
  - To delete an IDR, select the "Delete" button associated with the IDR to be expunged. A pop-up message will display requesting confirmation of the delete request.
    1. **Cancel:** Refreshes the page, clears the delete request and returns to the top of the IDR.
    2. **OK:** Captures the request and eliminates the IDR and its contents.
- **IDR UID:** The unique identifier of the IDR. When selected, this hyperlink will open the IDR to the appropriate display per the user selecting it (draft for the Record Owner & view for all other users).
- **Reassign/Reopen:** The Reassign/Reopen column displays either one button or the other depending on the IDR status. The Reassign button populates when the IDR is in a Draft status, while "Reopen" displays for completed IDRs. This column only populates for users with Supervisor or higher access. Button functionality is enabled for users of the same Team Code as the Record Owner.
  - To Reopen or Reassign an IDR, start by clicking the associated button for the IDR to be Reopened or Reassigned. A pop-up message will display requesting confirmation of the Reopen/Reassign request.

i. **OK:** Captures the request and Reopens or Reassigns the IDR.
ii. **Cancel:** Refreshes the page, clears the Reopen/Reassign request, and returns to the top of the Record.

10.1.6 Evaluation (SPE/PE)

Figure 10.13 shows the default view of the Evaluation section. This area is excluded from System/Process Evaluation Records for Quality Assurance KCRs and is located within the associated IDR.

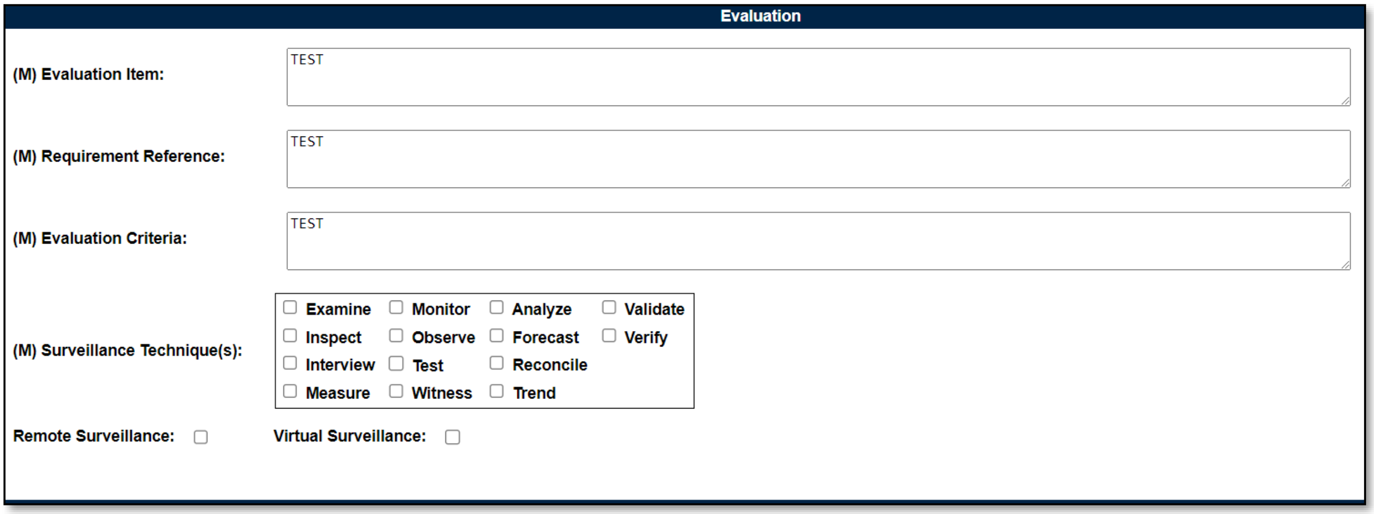


Figure 10.13

Associated Data Fields for **Figure 10.13**

- **(M) Evaluation Criteria**: A text box used to enter the evaluation criteria for the Record being worked *(max of 3,000 characters).*
- **(M) Evaluation Item:** A text box used to describe the item being evaluated for the Record being worked *(max of 3,000 characters).*
- **Remote Surveillance:** Check box identifying if the surveillance was remote.
- **(M) Requirement Reference:** A text box used to enter requirement references for the Record being worked *(max of 3,000 characters).*
- **(M) Surveillance Techniques:** Check boxes used to identify surveillance techniques used. A minimum selection of one is required to mark the Record "Complete".
- **Virtual Surveillance:** Check box identifying if the surveillance was virtual.

10.1.7 Conclusion (SPE/PE)

Figure 10.14 shows the default view of the Conclusion section. This is where the Records' findings are entered.

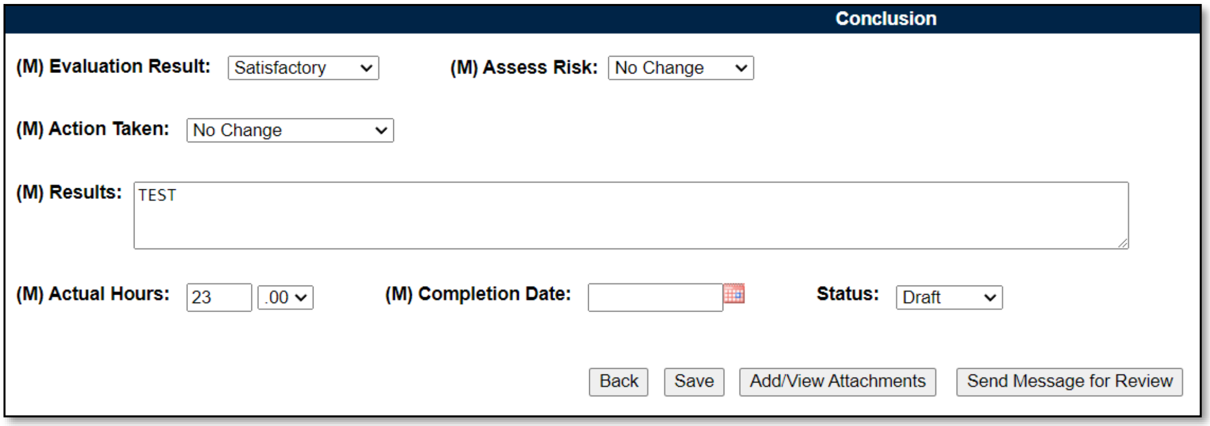


Figure 10.14

Associated Data Fields for **Figure 10.14**

- **(M) Action Taken:** A determination by the Record Owner as to what (if any) action is to be taken. A selection of “Increase Surveillance”, “Decrease Surveillance” or “No Change” is made through the dropdown provided.
- **(M) Actual Hours:** Two fields used to enter the number of hours it took to conduct the surveillance as entered by the Record Owner. First field is related to hours and does not allow for negative hours or special characters. Second field is a dropdown related to minutes and defaults as “.00”.
- **(M) Assess Risk:** Assessment of the current Risk by the Record Owner. A selection of “Increase Risk”, “Decrease Risk” or “No Change” is made through the dropdown provided. When “Increase Risk” or “Decrease Risk” is selected, the “Update KCR Risk” button populates as seen in **Figure 10.15**. By clicking on the “Update KCR Risk” button, the Record is automatically saved (draft status), while the user is navigated to the associated KCR’s editable view with Record locking active.

Figure 10.15

- **(M) Completion Date:** A field used to Record the date the surveillance was completed. A future Completion Date may be used while the Record is in a draft status. However, a Completion Date less than or equal to “todays date” is required before the Record can be marked “Complete”.
- **(M) Evaluation Results:** Results of the evaluation as determined by the Record Owner. A selection of “Satisfactory” or “Un-Satisfactory” is made through the dropdown provided.
- **(M) Results:** A text box to describe the results of the inspection *(max of 100 characters).*
    - If the field gets identified with text that could be blocked by DISA, a pop-up with the text “PDREP has detected a disallowed character combination in your entry of "(M) Results" that may interfere with security compliance.” will populate.
    - Click OK to continue then, if needed, a second pop-up will display informing you if there are any changes being applied to the field “Characters removed. Please check your entries for accuracy.”
    - Click OK then review the text field for any updates as instructed by the pop-up.

IDR Actual minute(s) dropdown values:

- .00 = On the hour
- .25 = Quarter Past the hour
- .50 = Half past the hour
- .75 = Quarter until the next hour

- **Status:** The present status *(Draft/Complete)* of the Record. This dropdown defaults to a draft status. When a user indicates the Record is complete, they will select “Complete” from the dropdown and click the “Save” button to capture their entry.
  - When the “Save” button is selected, a warning will populate notifying the user the Record is about to be marked as “Complete” and will no longer be editable (see **Figure 10.16**).
    - **Cancel:** Refreshes the page, clears the request to Complete the Record and returns to the top of the page.
    - **OK:** Captures the request and marks the Record Complete (when all mandatory fields have been satisfied). If not, an error message is generated at the top of the Record.

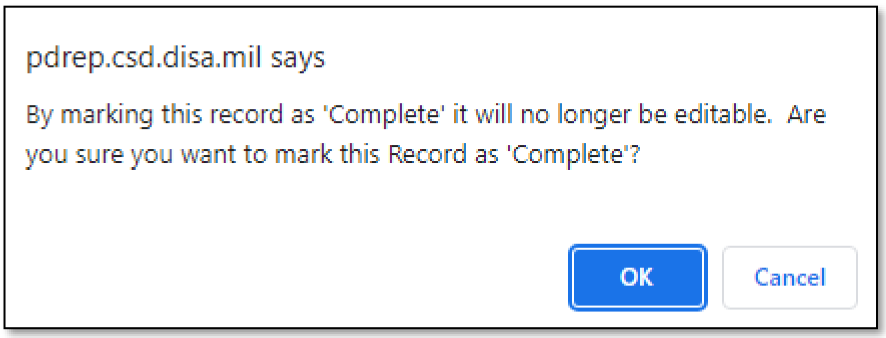


Figure 10.16

Associated Button Functionality for **Figure 10.14**

- **Add/View Attachments:** This button opens the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Record being worked. Please note each Plan, Record and IDR has its own space for attachments. This means applied documents are exclusive to the location they were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected, a warning will populate notifying the user that the Record is about to be marked as “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.
- **Send Message for Review:** Saves the Record in draft status before opening to the correspondence page.
- **Update KCR Risk:** Navigates the user to the associated KCR for a Risk reassessment. When the “Update KCR Risk” button is used, the Record is automatically saved (draft status), while the user is navigated to the associated KCR’s editable view (with Record locking active).

Note: *PDREP does not have an auto-save feature.* *If the “Save” button is not used, work will be lost!*

10.2 SPE IDR

System/Process Evaluation (SPE) Inspection Detail Report (IDR)

Inspection Detail Reports are attributed to those KCRs designated as Quality Assurance (NASA, NSEO & QA), Aircraft Operations, or Contract Safety. For a SPE to be marked “Complete”, the Record must contain a minimum of one completed IDR.

Figure 10.17 shows the default view of the Associated IDR’s section within the SPE. This section is only displayed on SPEs that have a KCR with a designated Functional Area of NASA, NSEO, Quality Assurance, Aircraft Operations or Contract Safety.

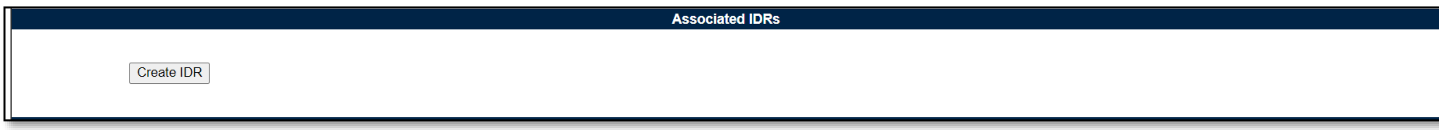


Figure 10.17

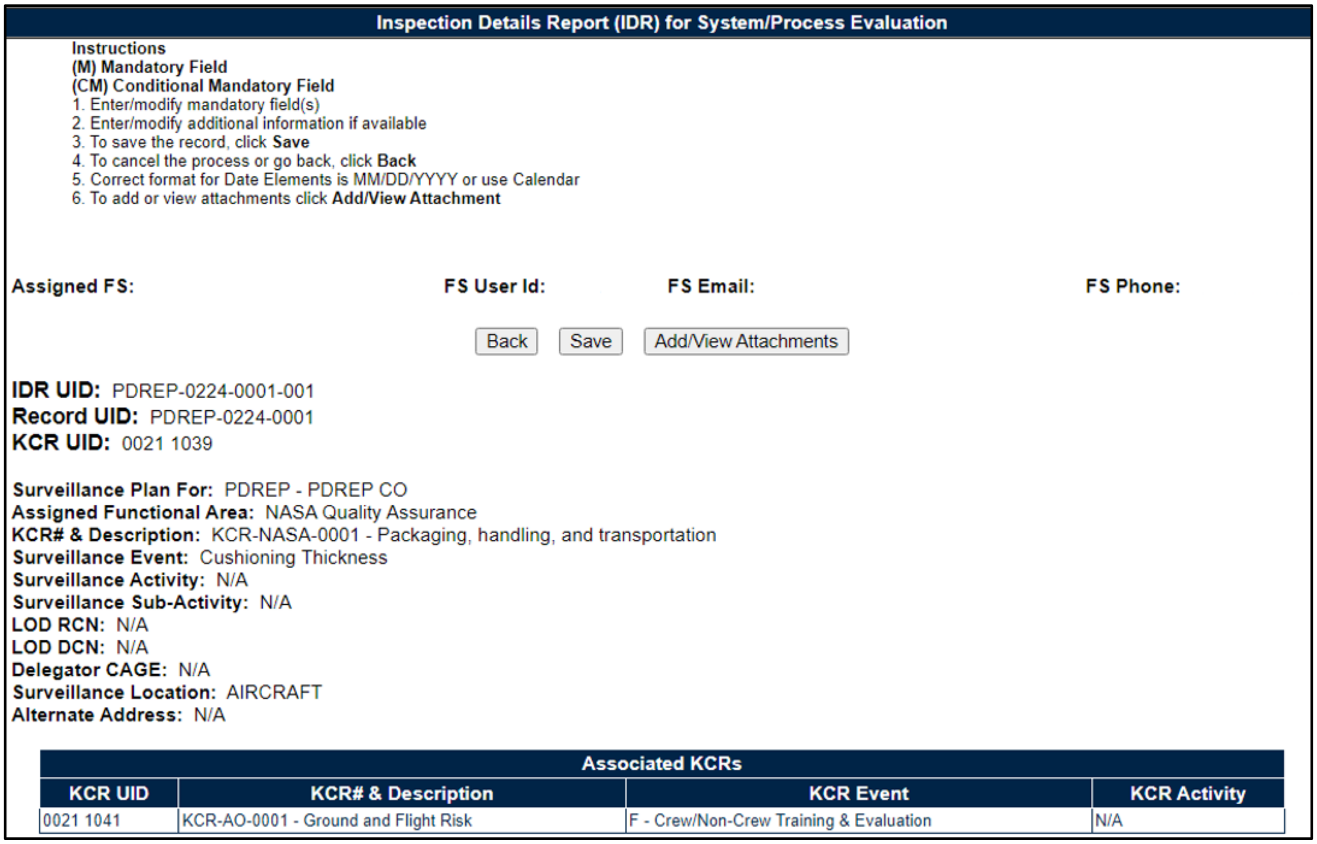
An Inspection Detail Report is initiated when the “Create IDR” button is selected. After the page refresh, the pending draft IDR displays. The IDR will remain in a pending draft status until the Inspection is either registered as a “Draft” through the “Save” action or is expunged, by exiting the page before the “Save” button is used. Once saved, the IDR will display within the Associated IDR table located on the SPE Record. A minimum of one completed IDR must be applied to a SPE Record to mark the Record “Complete”.

Associated Button Functionality for **Figure 10.17**

- **Create IDR:** This button processes the request to create a new IDR associated with the SPE Record. Once a Record has been generated and saved (draft status), a line item will appear on the IDR table (**Figure 10.17**).

10.2.1 Details (IDR for SPE)

Figure 10.18 shows the default view of the Details section within the SPE. This area will duplicate the higher-level SPE Record (also known as the “Parent Record”).



Inspection Details Report (IDR) for System/Process Evaluation

Instructions
(M) Mandatory Field
(CM) Conditional Mandatory Field
1. Enter/modify mandatory field(s)
2. Enter/modify additional information if available
3. To save the record, click **Save**
4. To cancel the process or go back, click **Back**
5. Correct format for Date Elements is MM/DD/YYYY or use Calendar
6. To add or view attachments click **Add/View Attachment**

Assigned FS: **FS User Id:** **FS Email:** **FS Phone:**

Back Save Add/View Attachments

IDR UID: PDREP-0224-0001-001
Record UID: PDREP-0224-0001
KCR UID: 0021 1039

Surveillance Plan For: PDREP - PDREP CO
Assigned Functional Area: NASA Quality Assurance
KCR# & Description: KCR-NASA-0001 - Packaging, handling, and transportation
Surveillance Event: Cushioning Thickness
Surveillance Activity: N/A
Surveillance Sub-Activity: N/A
LOD RCN: N/A
LOD DCN: N/A
Delegator CAGE: N/A
Surveillance Location: AIRCRAFT
Alternate Address: N/A

Associated KCRs

KCR UID	KCR# & Description	KCR Event	KCR Activity
0021 1041	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	N/A

Figure 10.18

Associated Data Fields for **Figure 10.18**

- **Alternate Address:** Open text box for entering an alternate address *(max of 75 characters).*
- **Assigned FS:** Also known as the “Record Owner”, this is the Functional Specialist responsible for the IDR. Automatically generated by the users’ profile.
- **Assigned Functional Area:** The Functional Area established and pulled from the KCR.
- **Associated KCRs:** Display listing other KCR UID, KCR# & Description(s) for which the Record Owner is also an assigned FS.
- **Delegation Number:** Text box to enter the LOD RCN.
- **FS Email:** Taken from the users’ profile, this is the email address of the assigned Functional specialist who will be conducting the inspection.
- **FS Phone:** Taken from the users’ profile, this is the phone number of the assigned Functional Specialist who will be conducting the inspection.
- **FS User Id:** The User ID of the assigned Functional Specialist who will be conducting the inspection *(generally the first initial of the users first name, followed by the first 4 letters of the last name, sometimes ending in a number).*
- **KCR UID:** The 8-digit unique identifier of the KCR associated to the SPE Record.
- **KCR # & Description:** The KCR# and Description established and pulled from the KCR.
- **LOD RCN:** Record Control Number of the Incoming LOD associated to the KCR.
- **LOD DCN:** Document Control Number of the Incoming LOD associated to the KCR.
- **Delegator CAGE:** CAGE Code with the associated incoming LOD RCN/DCN from the KCR.
- **IDR UID:** The 16-digit unique identifier of the Inspection Detail Report. The IDR UID is an extension of the Record UID by three digits and displays the sequence for which it was created (beginning with 001). This number automatically generates after the IDR is saved.
    - **Record UID Format:**

        - Plan's Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
        - *Example: PDREP - 0622 – 0001*
    - **IDR UID Format:**
        - Record UID + 3-digit sequential number of populations starting at 001.
        - *Example: PDREP - 0622 - 0001 - 001*
- **Record UID:** The 13-digit unique identifier pulled from the SPE Record.
- **Surveillance Activity:** The Surveillance Activity established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **Surveillance Event:** The Event established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Event in the KCR.
- **Surveillance Location:** Displays the associated KCR location(s) as established in the KCR and selected in the SPE Record.
- **Surveillance Plan For:** The CAGE Code and Company Name of the contractor to whom the Surveillance Plan is attributed.
- **Surveillance Sub-Activity:** The Surveillance Sub-Activity established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Sub-Activity in the KCR.

Associated Button Functionality for **Figure 10.18**

- **Add/View Attachments:** This button opens the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the IDR being worked. Please note each Plan, Record and IDR has its own space for attachments. This means applied documents are exclusive to the location they were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the "Save" button is selected, a warning will populate notifying the user the IDR is about to be marked as "Complete" and will no longer be editable. A selection of "OK" or "Cancel" will need to be used to clear the pop-up.

10.2.2 Inspection Criteria (IDR for SPE)

Figure 10.19 shows the default view of the Inspection Criteria section within the IDR for SPE.

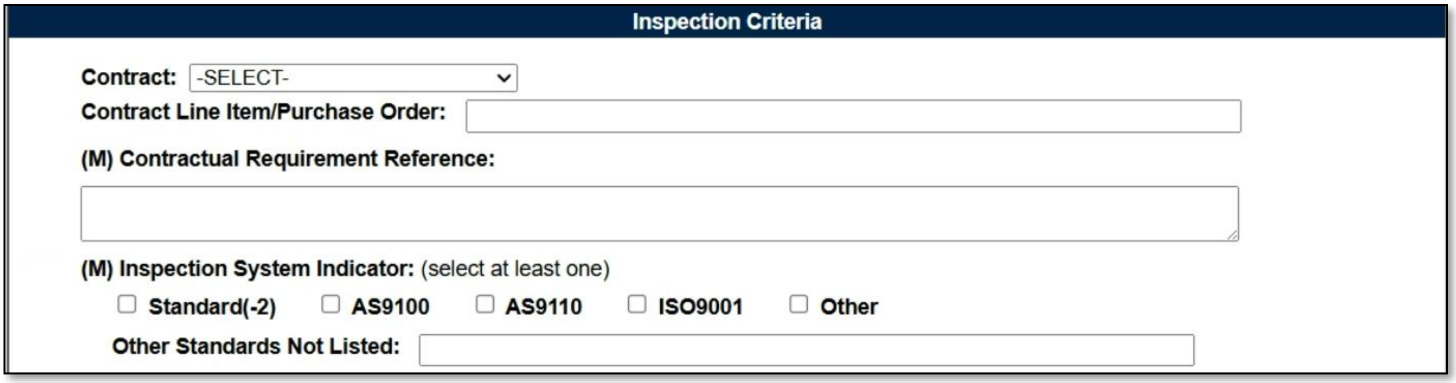


Figure 10.19

Associated Data Fields for **Figure 10.19**

- **Contract**: Restricted to one selection, this dropdown displays Contracts applied to the SPE Record. The dropdown will be blank when a contract has not been applied to the SPE.
- **Contract Line Item/Purchase Order**: Text box to the selected Contracts Line Item or Purchase Order for the IDR *(max of 50 characters).*
- **Contractors Command Media:** Text box to the selected Contracts Line Item or Purchase Order for the IDR *(max of 250 characters).*
  - If the field gets identified with text that could be blocked by DISA, a pop-up with the text “PDREP has detected a disallowed character combination in your entry of "(M) Contractors Command Media" that may interfere with security compliance.” will populate.
  - Click OK to continue then, if needed, a second pop-up will display informing you if there are any changes being applied to the field “Characters removed. Please check your entries for accuracy.”
  - Click OK then review the text field for any updates as instructed by the pop-up.
- **Inspection System Indicator:** Check applicable box(es) with a minimum selection of one for:
  - AS9100
  - AS9110
  - ISO9001
  - Other
  - Standard (-2)
- **Other Standard not listed:** Text box allowing for Other Standards Not Listed to be entered for the IDR *(max of 50 characters).*

10.2.3 Process Elements (IDR for SPE)

Figure 10.20 shows the default view of the Process Element section within the IDR for SPE.

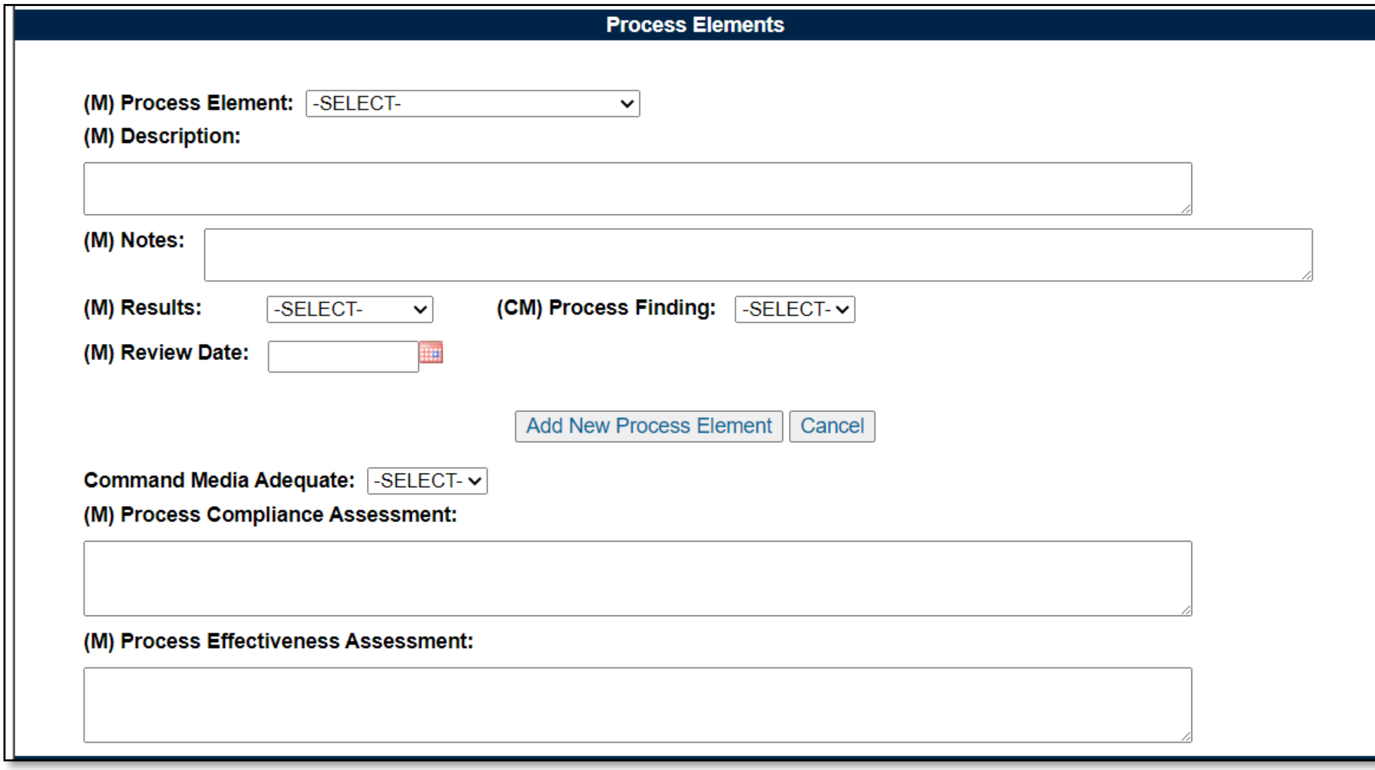


Figure 10.20

A minimum of one Process Element must be applied to the IDR before the IDR may be marked "Complete". To add a Process Element to the IDR, enter the information into the text fields provided as shown in **Figure 10.21**.

Note: *"Process Findings" will only populate for Aircraft Operations and Contract Safety IDR Records when "Results" is selected "Un-Satisfactory".*

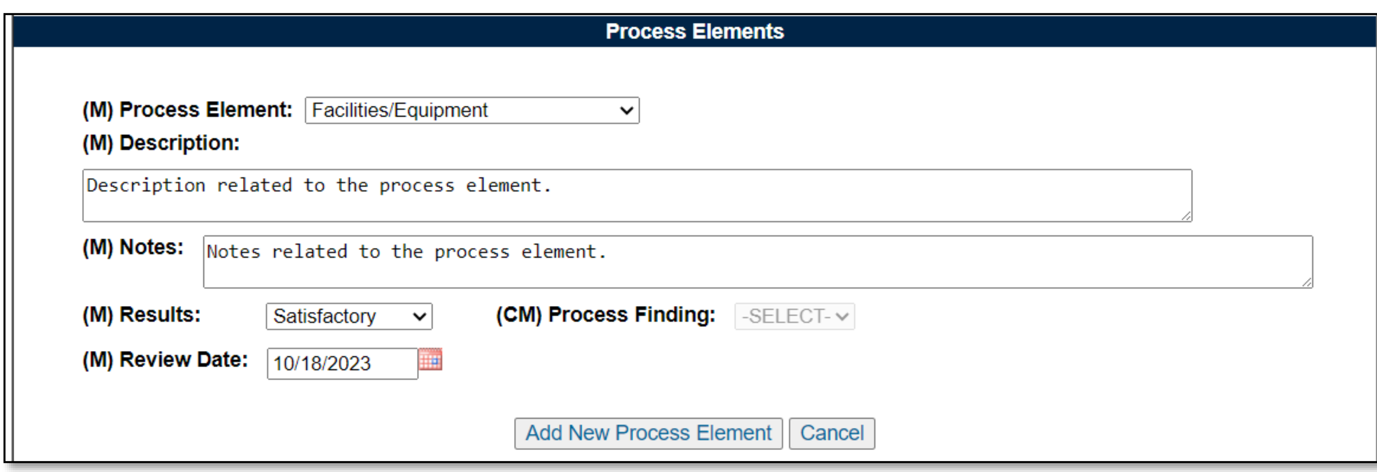


Figure 10.21

Click the “Add New Process Element” button to apply the Process Element to the Process Element Table (as seen in **Figure 10.22**). Not all data fields must be present to apply a Process Element to the Process Element Table. An example of this may be seen in **Figure 10.22**. All five data fields (Process Element, Description, Notes, Results and Review) must be present (per Process Element) to complete the IDR.

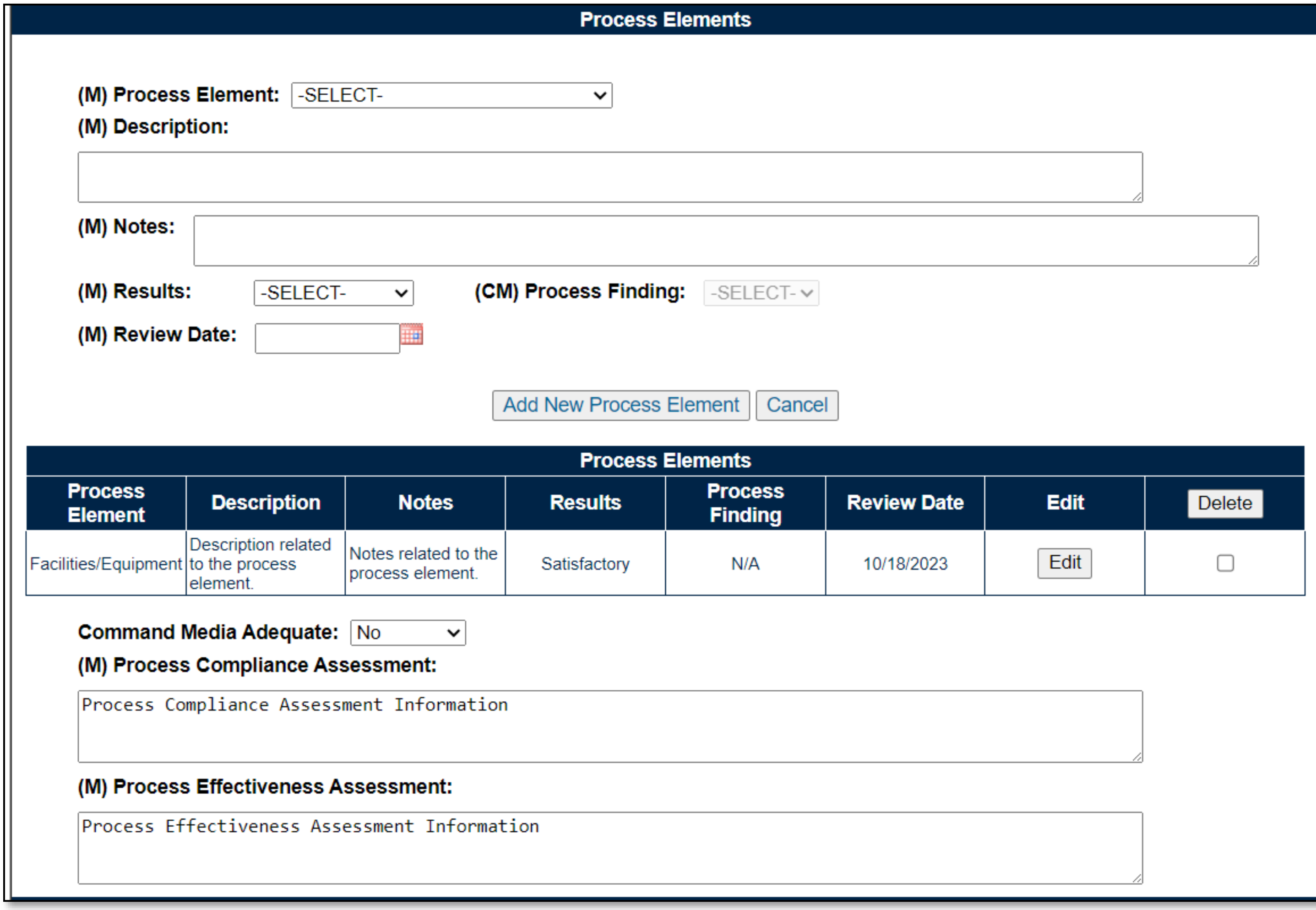


Figure 10.22

Associated Data Fields for **Figure 10.22**

- **Command Media:** A dropdown (*Yes/No*) to determine if Command Media is associated with the IDR.
- **Description:** Text box used to enter the description of the process *(max of 500 characters).*
- **(M) Notes:** text field available to enter notes related to the Process Element.
- **(M) Process Compliance Assessment:** A text box to describe the Process Compliance of the inspection *(max of 3,000 characters).*
- **(M) Process Effectiveness Assessment:** A text box to describe the Process Effectiveness of the inspection *(max of 3,000 characters).*
- **(M) Process Element:** A selection of Process Element is made through the dropdown provided. Selections for Process Element are:
  - Element Review
  - Environment

- Machine
- Manpower
- Material
- Method

- **(CM) Process Findings:** Dropdown under the definition to select Process Findings
- **Process Element Table:** An accumulation of the Process Element, Description, Results and Review data fields as applied to the table. Though the table can accommodate multiple entries, it will be hidden until a Process Element is applied.
- **Results:** Results of the review as determined by the Record Owner. A selection of “Satisfactory” or “Un-Satisfactory” is made through the dropdown provided.
- **Review Date:** Date the review was conducted.

Associated Button Functionality for **Figure 10.22**

- **Add New Process Element:** This button adds the Process Element to the Process Element Table. If the button is not used, the contents of the four Process Element data fields will not be captured.
- **Cancel:** This button clears the contents of the four Process Element text fields prior to being applied to the Process Element Table. When editing an applied Process Element from the Table, this button clears any changes and returns the Process Element to the table.
- **Delete:** Removes the Process Element from the Process Element Table. This action occurs when the corresponding box is selected and the “Delete” button is clicked. A pop-up message will display requesting confirmation of the delete action as seen in **Figure 10.23**.
  - **OK:** Captures the request and eliminates the Process Element from the table.
  - **Cancel:** Refreshes the page, clears the delete request and returns to the top of the IDR with the delete check box still selected for the Process Element.

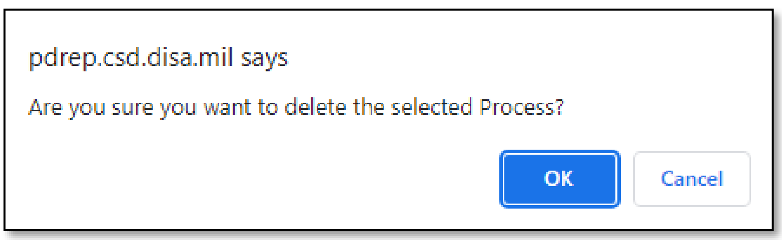


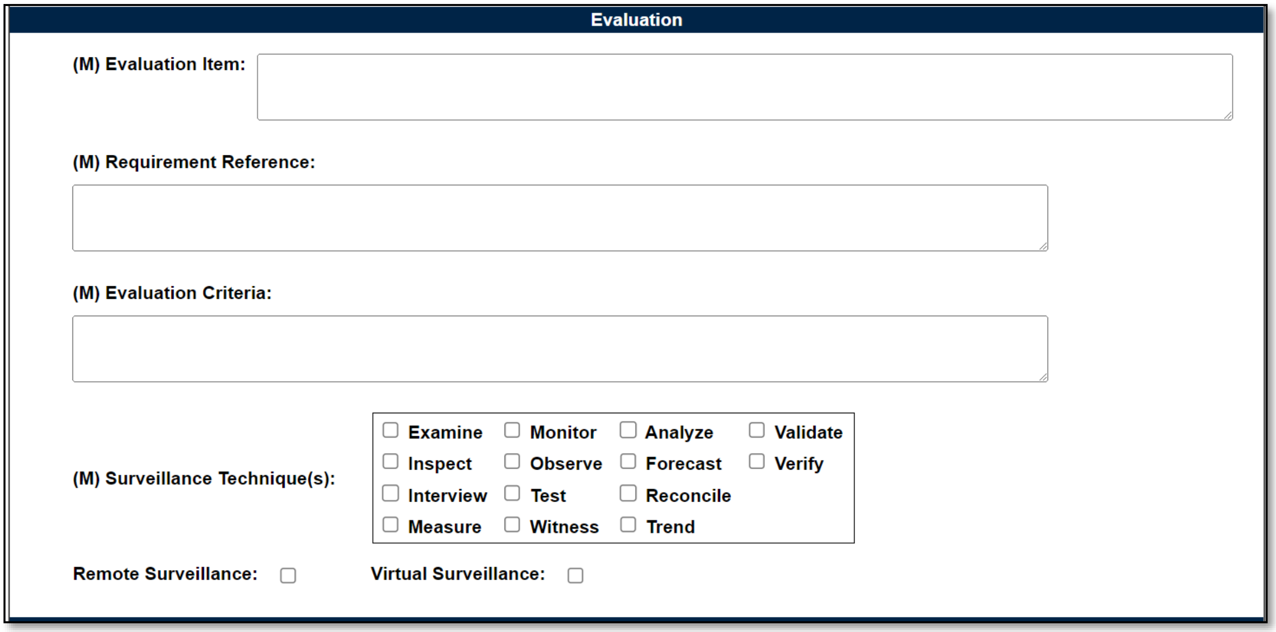
Figure 10.23

Note: *PDREP does not have an auto-save feature. If the “Save” button is not used, work will be lost!*

- **Edit:** This button opens the selected Process Element to an editable display, allowing the Record Owner to edit the selected Process Element. The “Save Process Element” must be used to capture the change and apply the Process Element back to the table.
- **Save Process Element:** Displays when editing a Process Element. This button reapplies the Process Element back to the Process Element Table. This button must be used to save any changes made while editing.

10.2.4 Evaluation (IDR for SPE)

Figure 10.24 shows the default view of the Results section within the IDR for SPE.


Evaluation

(M) Evaluation Item:

(M) Requirement Reference:

(M) Evaluation Criteria:

(M) Surveillance Technique(s):

☐ Examine	☐ Monitor	☐ Analyze	☐ Validate
☐ Inspect	☐ Observe	☐ Forecast	☐ Verify
☐ Interview	☐ Test	☐ Reconcile	
☐ Measure	☐ Witness	☐ Trend	

Remote Surveillance: ☐ Virtual Surveillance: ☐

Figure 10.24

Associated Data Fields for **Figure 10.24**

- **(M) Evaluation Criteria**: A text box used to enter the evaluation criteria for the Record being worked *(max of 3,000 characters).*
- **(M) Evaluation Item:** A text box used to describe the item being evaluated for the Record being worked *(max of 3,000 characters).*
- **Remote Surveillance:** Check box identifying if the surveillance was remote.
- **(M) Requirement Reference:** A text box used to enter requirement references for the Record being worked *(max of 3,000 characters).*
- **(M) Surveillance Techniques:** Check boxes used to identify surveillance techniques used. A minimum selection of one is required to mark the Record “Complete”.
- **Virtual Surveillance:** Check box identifying if the surveillance was virtual.

10.2.5 Conclusion (IDR for SPE)

Figure 10.25 shows the default view of the Conclusion section within the IDR for SPE.

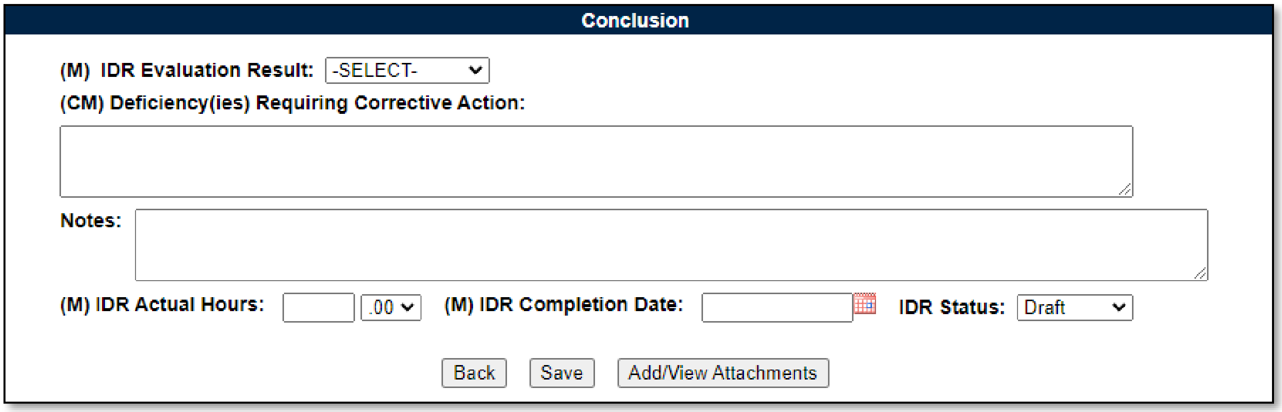


Figure 10.25

- **(CM) Deficiency(ies) Requiring Corrective Action:** Text box to enter Deficiencies found during the inspection that require Corrective Action. Field becomes mandatory when IDR Evaluation Results are "Un-Satisfactory" *(max of 1,000 characters).*
- **Notes:** Open text box *(max of 3,000 characters).*
- **(M) IDR Actual Hours:** Two fields used to enter the number of hours it took to conduct the inspection as entered by the Record Owner. First field is related to hours and does not allow for negative hours or special characters. Second field is a dropdown related to minutes and defaults as ".00".

  <u>IDR Actual minute(s) dropdown values:</u>
  - .00 = On the hour
  - .25 = Quarter Past the hour
  - .50 = Half past the hour
  - .75 = Quarter until the next hour

- **(M) IDR Completion Date:** A field used to Record the date the inspection was completed. A future Completion Date may be used while the Record is in a draft status. However, a Completion Date less than or equal to "todays date" is required before the Record can be marked "Complete".
- **(M) IDR Evaluation Results:** Results of the evaluation as determined by the Record Owner. A selection of "Satisfactory" or "Un-Satisfactory" is made through the dropdown provided.
- **IDR Status:** The status *(Draft/Complete)* of the IDR. This dropdown defaults to a draft status. When a user indicates the IDR is complete, they will select "Complete" from the dropdown and click the "Save" button to capture their entry.
  - When the "Save" button is clicked, a warning will populate notifying the user the IDR is about to be marked as "Complete" and will no longer be editable.
    - **Cancel:** Refreshes the page, clears the request to Complete the IDR, and returns to the top of the page.
    - **OK:** Captures the request and marks the Record Complete (when all mandatory fields have been satisfied). If not, an error message is generated at the top of the IDR.

Associated Button Functionality for **Figure 10.25**

- **Add/View Attachments:** This button opens the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the IDR being worked. Please note each Plan, Record and IDR has its own space for attachments. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected, a warning will populate notifying the user the Record is about to be marked as “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.

11 SUMMARY

This concludes the DCMA Surveillance Plan (SP) KTR Details user guide.

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

The DCMA Surveillance Plan (SP) KTR Details user guide is intended to be used as a technical reference document to assist users with system navigation and basic operational functionality within PDREP-AIS. Questions, comments or concerns regarding the SP module or this guide should be directed to the PDREP Customer Support Desk.

Contact information for the support desk is provided below.

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

Appendix 1 – Record Control Number (RCN)

Every Surveillance Plan has a Record Control Number (RCN) that is made up of a CAGE, the year the Plan was initiated, and currently a two-digit revision serial sequence code. The current state of SP does not increment this serial number when a record is archived or reopened. The serial number for new SPs originating in May 2021 or later will always be 01. Older SPs from the previous use of SP by NSEO *may* have a different serial number.

This number is invisible to the user everywhere but the attachments page (which requires this sequence code to properly attach to the Plan) and within the Ad Hoc. See **Figure A1.1** for an example from the attachments page, and **Figure A 1.2** for an example from within the Ad Hoc.

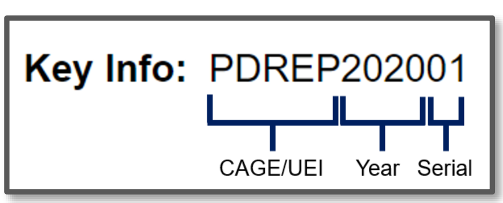


Figure A1.1

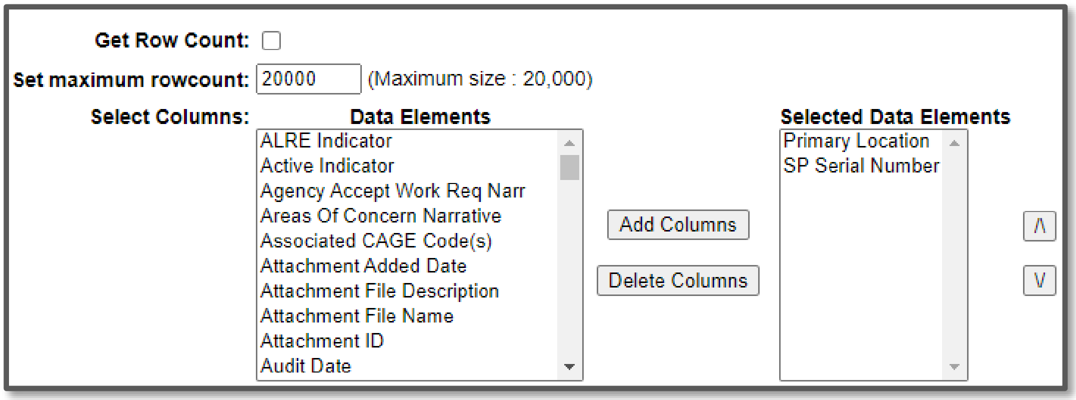


Figure A1.2

The data field called "SP Serial Number" in the ad hoc is the two-digit serial number as shown above. When pulling an ad hoc, it is suggested the Primary Location (CAGE) and SP Serial Number fields be chosen first, as they are what makes a Plan unique and will aid in analyzing the ad hoc output. If a Plan has multiple serial numbers (as in it has been revised multiple times), a pivot table in Excel is an easy way to separate this data. There is a user guide specifically for the ad hoc reporting tool and it can be found on the PDREP website here: https://www.pdrep.csd.disa.mil/pdrep_files/reference/guides_manuals/guides_manuals.htm

Appendix 2 – Risk Rating Table

The KCR Risk Consequence and Risk Likelihood calculation for Risk Rating uses the following table for assignment of a Risk Rating based on the highest Risk Consequence factor combined with the Risk Likelihood factor.

Table A2.1

Risk Matrix		Consequence				
		1	**2**	**3**	**4**	**5**
Likelihood	**5**	11	16	20	23	25
	4	7	12	17	21	24
	3	4	8	13	18	22
	2	2	5	9	14	19
	1	1	3	6	10	15

Risk is determined using the following procedure:

- **Perform Risk Assessment:** Assess each surveillance event/activity identified for risk. The highest risk area (Cost, Schedule, or Technical Performance) determined for each event/activity Planned for surveillance will be utilized to select the appropriate level of "Likelihood of Noncompliance" and "Consequence of Noncompliance".

- **Likelihood of Noncompliance:** Determine the “Likelihood” (probability) the event/activity will find a noncompliance affecting cost, schedule, or technical performance. Using the information in below, identify the numerical "level" for Likelihood based on sound judgment.

Table A2.2

Likelihood	Probability of Occurrence	Level
Near Certainty	~90%	**5**
Highly Likely	~70%	**4**
Likely	~50%	**3**
Low Likelihood	~30%	**2**
Not Likely	~10%	**1**

- **Consequence of Noncompliance.** DCMA Functional Areas provide the tables for their areas.