



# DCMA Surveillance Plan (SP) Scheduler

User Guide  
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## FOREWORD

This user guide provides information about the Product Data Reporting and Evaluation Program - Automated Information System (PDREP-AIS) and is intended to assist users with 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](https://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 via 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
<b>NO ACCESS</b>	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.
<b>VIEW ACCESS</b>	<ul style="list-style-type: none"> <li>View Plan</li> <li>Access Plan</li> <li>Ad Hoc Reports</li> </ul>	<ul style="list-style-type: none"> <li>Access Scheduler</li> <li>View Schedule</li> <li>Ad Hoc Reports</li> </ul>	<ul style="list-style-type: none"> <li>Access Records</li> <li>View Records</li> <li>Ad Hoc Reports</li> </ul>
<b>Functional Specialist (FS) / Team Lead Non-Supervisor</b>	<b>View Access Plus:</b> <ul style="list-style-type: none"> <li>Create a Plan</li> <li>Edit Plan Details</li> <li>Archive a Plan</li> <li>Activate a Plan</li> <li>View History</li> <li>Add Attachments</li> <li>Edit Attachments</li> <li>Delete Attachments</li> <li>View Attachments</li> <li>Send General Correspondence</li> <li>Add a KCR</li> <li>Edit a KCR</li> <li>Assign FS to KCR (same Team)</li> <li>Remove FS from KCR (same Team)</li> </ul>	<b>View Access Plus:</b> <ul style="list-style-type: none"> <li>View Schedule</li> <li>Create Schedule</li> <li>Export (download) Schedule</li> <li>Edit (own) Schedule</li> <li>Cancel (own) Occurrence</li> <li>Reschedule (own) Occurrence</li> <li>Create (own) Record</li> <li>Complete (own) Record</li> <li>View Record</li> </ul>	<b>View Access Plus:</b> <ul style="list-style-type: none"> <li>Access Record</li> <li>Edit (own) Record</li> <li>Complete (own) Record</li> <li>Extend (own) On-Demand Record</li> <li>View Record</li> <li>Send Message for Review</li> <li>Add FS to Joint Surveillance Team (Same DoDAAC)</li> <li>Edit Risk Rating</li> <li>Access IDR Table</li> <li>Edit (own) IDR</li> <li>Complete (own) IDR</li> <li>View IDR</li> <li>Record Level Attachments</li> </ul>

Role	Plan	Scheduler	Records
<b>Supervisor/ Contract Management Office (CMO)</b>	<b>FS/Team Lead Access Plus:</b> <ul style="list-style-type: none"> <li>• Acquire Plan (Record Locked)</li> <li>• Release Plan (Record Locked)</li> <li>• Assign FS to KCR (no restrictions)</li> </ul>	<b>FS/Team Lead Access Plus:</b> <ul style="list-style-type: none"> <li>• Cancel Occurrence (same DoDAAC)</li> <li>• Reschedule Occurrence (same DoDAAC)</li> <li>• Mass Cancel (same DoDAAC)</li> </ul>	<b>FS/Team Lead Access Plus:</b> <ul style="list-style-type: none"> <li>• Create On-Demand Record</li> <li>• Delete Record (same Team)</li> <li>• Reassign Draft Record (same Team)</li> <li>• Reopen Record (same Team)</li> <li>• Delete IDR (same Team)</li> <li>• Reassign Draft IDR (same Team)</li> <li>• Reopen IDR (same Team)</li> </ul>

## 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.

**PDREP**  
Product Data Reporting and Evaluation Program

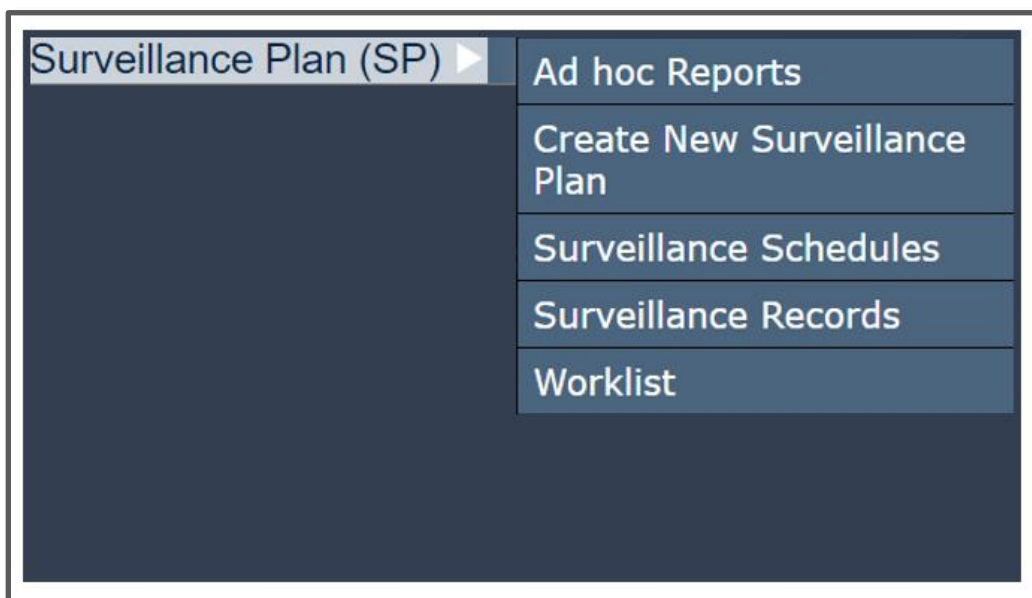
Welcome, PDREP User  
[Home](#) • [Help](#)

Last Logon: MAY 27, 2023 11:01 PM  
[User Profile](#) • [Logout](#)

APPLICATIONS		Recently Accessed Record(s)	
Record Type	Record Control Number	Last Accessed Date/Time	
Surveillance Plan (SP) ▾			
Ad hoc Reports			
Create New Surveillance Plan			
Surveillance Schedules			
Surveillance Records			
Worklist			

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**).

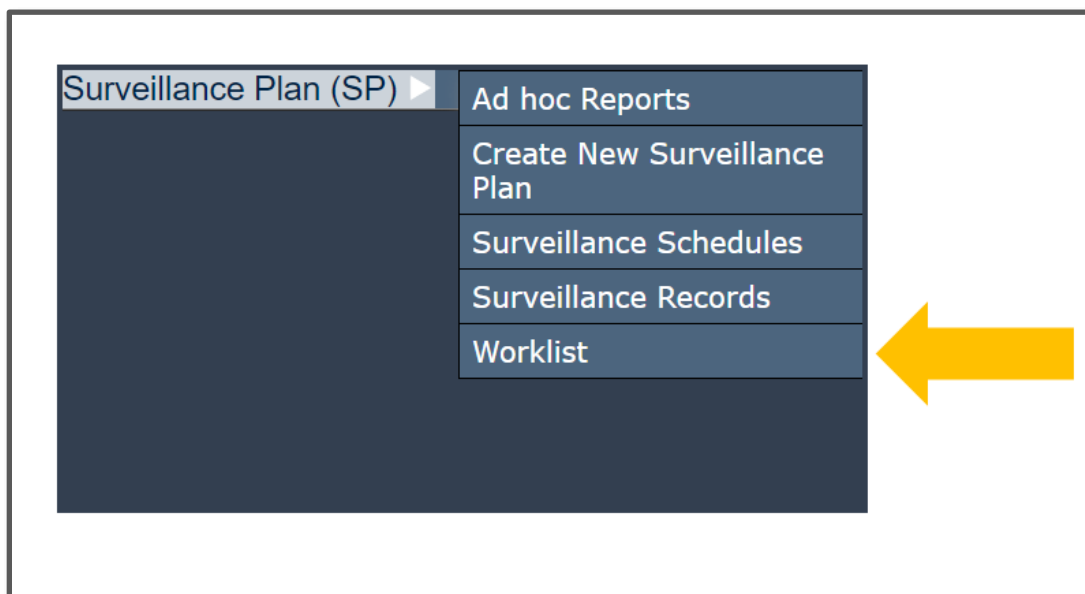


Figure 2.1

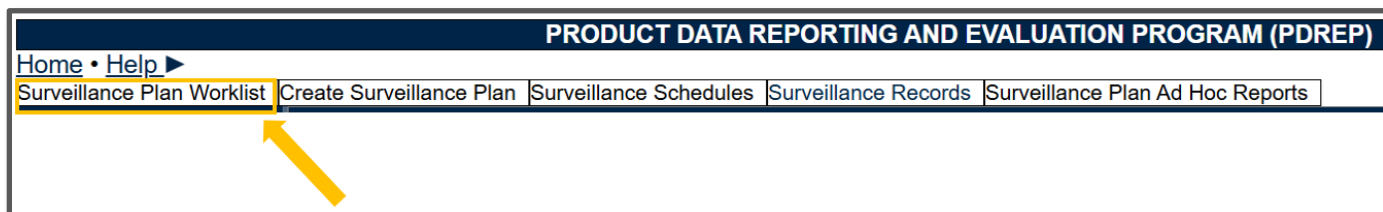


Figure 2.2

### 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**.

**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

(M) Worklist Type: KTR Details ▼  
KCR  
KTR Details  
RECORD

(M) Date SP Updated: From 11/04/20 To 11/04/2025

Primary Location:  Lookup Status: Any ▼

User ID:

Team Code:

CMT DoDAAC:

KCR UID:

Display Worklist

---

Filter By: CAGE Code: N/A ▼  
 Status: N/A ▼  
Apply Reset

< Prev Page 0 of 0 Next > Result count: 0 50 rows per page

Prime Location	Company Name	Surv. Type	KTR Status	Last Update Date	Last Action	KTR Attachments	View KTR
----------------	--------------	------------	------------	------------------	-------------	-----------------	----------

**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**.

(M) Worklist Type: RECORD ▼

(M) Date SP Updated: From 11/04/2024 To 11/04/2025

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: 2 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	0021.1041	KCR-AO-0001 - Ground and Flight Risk	PDREP-0125-0002	SPE	Draft	01/04/2025	<a href="#">Click Here</a>	<a href="#">View Record Attachments</a>	<a href="#">View Record</a>
PDREP	PDREP.CO	0021.1619	KCR-AQ-0004 - 252.216-7004: Cost Plus Award Fee	PDREP-0125-0001	DPE	Complete	01/01/2025	<a href="#">Click Here</a>	<a href="#">View Record Attachments</a>	<a href="#">View Record</a>

**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**.

The screenshot displays the 'Surveillance Plan Worklist' interface. At the top, a dark blue header bar contains the title 'Surveillance Plan Worklist'. Below this, the 'Instructions' section is highlighted in bold. It states that '(M) denotes a mandatory field' and lists four steps: 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; 4. Select **Status** as optionally needed; 5. Click **Display Worklist** button. Below the instructions, a red error message is displayed: 'Primary Location CAGE, User Code, Team Code, CMT DoDAAC or KCR UID is required to search.' followed by 'Start Date is a mandatory field' and 'End Date is a mandatory field'. At the bottom, there is a dropdown menu for '(M) Worklist Type' set to 'RECORD', and a date range selector for '(M) Date SP Updated: From' and 'To' with calendar icons.

**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 “today’s” 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 11/04/2023 To 11/04/2025

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> <SELECT> COMPLETE DRAFT Reset

< Prev Page 1 of 2 Next > Count: 68 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	TEST COMPANY NSLC PORTSMOUTH PDREP TEAM	0023.4156	KCR-AO-0001 - Ground and Flight Risk	PDREP-0125-0029	SPE	Draft	01/24/2025	<a href="#">Click Here</a>	<a href="#">View Record Attachments</a>	<a href="#">View Record</a>
PDREP	TEST COMPANY NSLC PORTSMOUTH PDREP TEAM	0026.8425	KCR-QA-0022 - Specialty Metals	PDREP-0125-0026	DPE	Draft	01/23/2025	<a href="#">Click Here</a>	<a href="#">View Record Attachments</a>	<a href="#">View Record</a>
PDREP	TEST COMPANY NSLC PORTSMOUTH PDREP TEAM	0026.8425	KCR-QA-0022 - Specialty Metals	PDREP-0125-0028	DPE	Draft	01/23/2025	<a href="#">Click Here</a>	<a href="#">View Record Attachments</a>	<a href="#">View Record</a>

Figure 2.6

## Associated Data Fields for Figure 2.6

- **(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) Date SP Updated: From:** Defaulting to "today's" 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 "today's" 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) 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).
- **\*(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. For additional information see **Section 2.4** of this document for CAGE Lookup instructions.
- **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.
- **(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) 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) Worklist Type**: A drop-down where a user can choose to view information specified at the KCR, KTR, or RECORD levels.

---

#### Associated Button Functionality for **Figure 2.6**

- **Apply**: Enacting the worklist to generate a new return based off the chosen parameters selected within the filter(s).
- **Display Worklist**: Loads a result set based on the criteria as entered on the screen.
- **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. For additional information see **Section 2.4** of this document.
- **(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.
- **Reset**: Clears selected filters and returns them to their “<Select>” default.

---

#### Associated Hyperlink Functionality for **Figure 2.6**

- **Company Name**: Hyperlink displaying 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.
- **KCR UID**: Hyperlink displaying the 8-digit unique identifier of the KCR. When selected, the KCR will open to an editable view of the KCR.

- **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.
- **Prime Location:** Hyperlink displaying the CAGE Code of the associated Company. When selected, this hyperlink navigates to the indicated Surveillance Plan’s landing page.
- **Record Attachments:** Hyperlink displaying the number of attachments at the Record 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 associated Record.
- **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.
- **View Record:** Hyperlink that navigates to the view-only display of the Record.

- **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.
- **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.
- **Filtering:** CAGE Code, Record Type, Status and Surv. Category are the drop-down fields a Worklist can be filtered by. Filtering is enabled only after a Worklist is generated.

## 2.3 Worklist Search Results

Select the “Display Worklist” button to perform a search after entering the minimum mandatory fields. Worklist results will be accessible at the bottom of the page with a numbered “Results Count” displaying above the Worklist itself (**Figure 2.7**). Returned results are downloadable to a spreadsheet by selecting the associated hyperlink.

Search Results Download: Click [here](#) to download data in spreadsheet

Filter By: CAGE Code:   
Record Type:   
Status:

Apply Reset

< Prev Page 1 of 1 Next >

Result count: 48

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
----------------	--------------	---------	--------------------	------------	-------------	---------------	------------------	-----------------	--------------------	-------------

**Figure 2.7**

If the values used for the selected criteria doesn't match that of an existing Plan, no results will be returned.

**Note:** Worklist displays will differ depending on the Worklist Type selected from the drop-down. See **Figure 2.8** for the three displays of Worklist headers by type.

KCR

Prime Location	Company Name	Surv. Category	KCR UID	KCR# & Description	KCR Status	Last Update Date	KTR Attachments	View KCR
<a href="#">81316</a>	<a href="#">PORTSMOUTH NAVAL SHIPYARD</a>	DPE	<a href="#">0019 2560</a>	KCR-AO-0001 - Ground and Flight Risk	Active	10/11/2023	<a href="#">Click Here</a>	<a href="#">View</a>

KTR Details

Prime Location	Company Name	Surv. Type	KTR Status	Last Update Date	Last Action	KTR Attachments	View KTR
<a href="#">81316</a>	<a href="#">PORTSMOUTH NAVAL SHIPYARD</a>	PLAN	Active	10/11/2023	SURVEILLANCE PLAN END ITEM ADDED	<a href="#">Click Here</a>	<a href="#">View KTR Details</a>

RECORD

Prime Location	Company Name	KCR UID	KCR# & Description	Record UID	Record Type	Record Status	Last Update Date	KTR Attachments	Record Attachments	View Record
<a href="#">81316</a>	<a href="#">PORTSMOUTH NAVAL SHIPYARD</a>	<a href="#">0019 2560</a>	KCR-AO-0001 - Ground and Flight Risk	<a href="#">81316-1023-0001</a>	DPE	Draft	10/11/2023	<a href="#">Click Here</a>	<a href="#">View Record Attachments</a>	<a href="#">View Record</a>

Figure 2.8

#### KCR Worklist Associated Data Fields for Figure 2.8

- **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# & Description:** Associated with the selected Functional Area.
- **KCR Status:** The status of the KCR.
  - *Active:* KCR engaged in active oversight.
  - *Inactive:* KCR no longer engaged in active oversight.
- **KCR UID:** 8-digit unique identifier of the KCR.
- **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.
- **Last Update Date:** The date the KCR was last updated, based on the "Save" action.
- **\*Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **Surv. Category:** Type of surveillance evaluation (DPE, DSE, PE, SPE) identified within the KCR.
- **View KCR:** Hyperlink that navigates to the view-only display of the KCR.

#### KCR Details Worklist Associated Data Fields for Figure 2.8

- **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.

- **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.
- **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 Action:** Description of the most recent change to the Plan. Actions listed are the same as those items saved to the History page.
- **Last Update Date:** The date the Plan (KTR Details Page) was last updated based on the “Save” action.
- **Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **Surv. Type:** This column indicates the type of Surveillance Plan. Currently, only one option (“Plan”) is available.
- **View KTR:** Hyperlink that navigates to the view-only display of the KTR Details Page.

---

#### Record Worklist Associated Data Fields for **Figure 2.8**

- **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# & Description:** Associated with the selected Functional Area.
- **KCR UID:** 8-digit unique identifier of the KCR.
- **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.
- **Last Update Date:** The date the associated Record was last updated, based on the “Save” action.
- **Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **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.
- **Record Status:** Displays the status of the associated Record UID.
- **Record Type:** Record type (DPE, DSE, PE, SPE) as determined by the KCR’s Surveillance Category.
- **Record UID:** 13-digit unique identifier of the Record.
- **View Record:** Hyperlink that navigates to the view-only display of the Record.

## 2.4 Lookup CAGE / Primary Location Search

- **Lookup CAGE:** CAGE Codes utilized in the application are validated against the PDREP database. The “Lookup” button allows the user to look up vendor information either by CAGE Code or by 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.

**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:** PDREP

CAGE Code	Company Name	Address	City	State	Select
PDREP	PDREP CO	NSLC PORTSMOUTH	PORTSMOUTH	NH	<input type="button" value="Select CAGE Code"/> <input type="button" value="View"/>

**Figure 2.9**

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 2.9**.

#### Associated Button Functionality for **Figure 2.9**

- **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 2.10**).
  - **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: <a href="#">SP USER (ALPHA) GUIDE ▶</a> • <a href="#">Logout</a>
<div>Print Back</div>	
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 2.10

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 2.11**.

Lookup CAGE	
<b>Instructions</b> 1. To search for an existing <b>CAGE Code</b> , enter one of the following: a. <b>CAGE Code</b> (must be A/N or #) b. <b>Contractors Name</b> (must be A/N) 2. Click <b>Search</b> 3. Select a CAGE Code by clicking corresponding <b>Select CAGE Code</b> 4. Click <b>Cancel</b> to return to previous screen	
Code FOR: CAGE	
Code:	<input type="text"/>
Name:	<input type="text" value="33333"/>
<div>Search Cancel</div>	
No data found.	

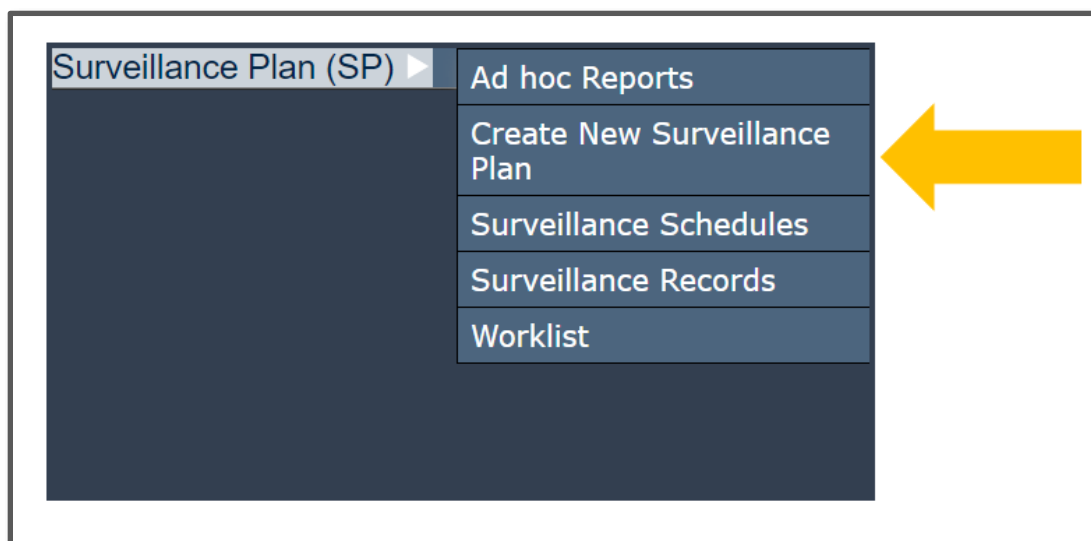
Figure 2.11



## 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.

Surveillance Plan Worklist	Create Surveillance Plan	Surveillance Schedules	Surveillance Records	Surveillance Plan Ad Hoc Reports
----------------------------	--------------------------	------------------------	----------------------	----------------------------------

**Multi-Function Surveillance Plan**

**User Information**

DoDAAC:	S4306A
Name:	PDREP USER
Phone:	555-555-5555
Email Address:	PDREPUSER@email.com
Team Code:	PH - TDM
Assigned Functional Area:	CONTRACT SPEC

(M) Primary Location:

**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**)

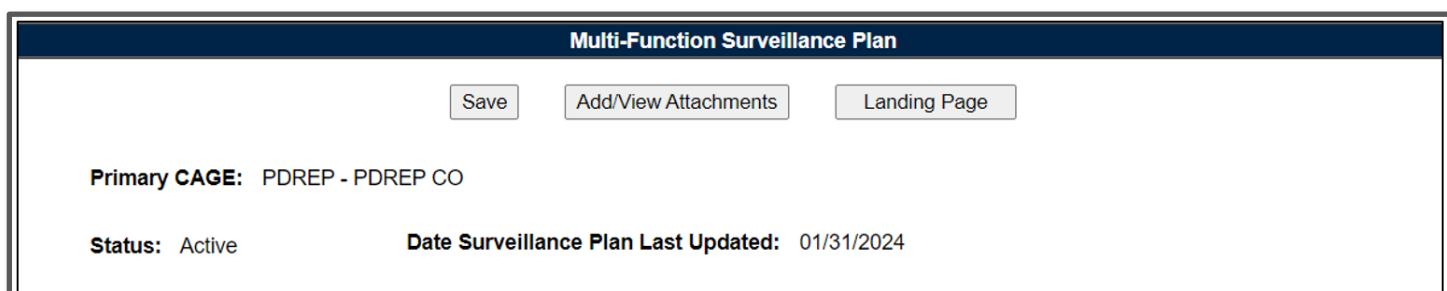
4. Applicable Contracts (**Section 3.2.5**)
5. End Item NSN/Part/Serial Number (**Section 3.2.6**)

**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.

The screenshot shows a web interface for a "Multi-Function Surveillance Plan". At the top is a dark blue header bar with the title "Multi-Function Surveillance Plan" in white. Below this bar, there are three buttons: "Save", "Add/View Attachments", and "Landing Page". Under the buttons, the text "Primary CAGE: PDREP - PDREP CO" is displayed. Below that, the text "Status: Active" is shown on the left, and "Date Surveillance Plan Last Updated: 01/31/2024" is shown on the right.

**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 Attaching a File in PDREP, 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) 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!

### 3.2.2 KTR POC

The screenshot shows a web form titled "KTR POC List". It contains five input fields, each with a label starting with "(M)": "POC Name:", "POC Title:", "POC Phone Number:", "POC E-mail:", and "Functional Area:". The "Functional Area" field is a dropdown menu currently showing "<SELECT>". Below the input fields are two buttons: "Add Contact" and "Cancel Edits". At the bottom of the form is a table with six columns: "Name", "Title", "Phone", "E-mail", "Functional Area", and "Edit", followed by a "Delete" column. The table is currently empty, and a message "No POC data to display for KTR PDREP202301" is displayed below the table.

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**)

The screenshot shows a web form titled "KTR POC List". At the top, a red error message states: "POC/Contact mandatory data requirements have not been met. Provide all Mandatory data fields (M/CM)". Below this, there are five input fields, each with a label in parentheses indicating it is mandatory: "(M) POC Name:", "(M) POC Title:", "(M) POC Phone Number:", "(M) POC E-mail:", and "Functional Area:". The "Functional Area" field is a dropdown menu currently showing "<SELECT>". Below the input fields are two buttons: "Add Contact" and "Cancel Edits". At the bottom of the form is a table with the following headers: "Name", "Title", "Phone", "E-mail", "Functional Area", "Edit", and "Delete". The table body is empty, and a message at the bottom of the table reads: "No POC data to display for KTR PDREP202301".

**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) 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!**

**KTR POC List**

(M) POC Name:

(M) POC Title:

(M) POC Phone Number:

(M) POC E-mail:

Functional Area:

<SELECT>

v

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	<div style="border: 1px solid #ccc; padding: 2px 5px;">Edit</div>	<div style="border: 1px solid #ccc; padding: 2px 5px;">Delete</div>

**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:

(M) POC Title:

(M) POC Phone Number:

(M) POC E-mail:

Functional Area:

NASA Quality Assurance

v

Update Contact

Cancel Edits

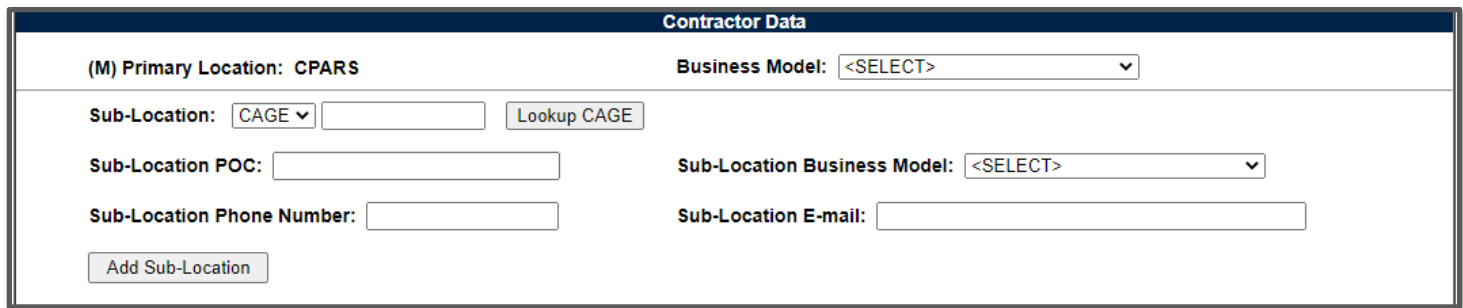
Name	Title	Phone	E-mail	Functional Area	Edit	Delete
<i>No POC data to display for KTR PDREP202301</i>						

**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.

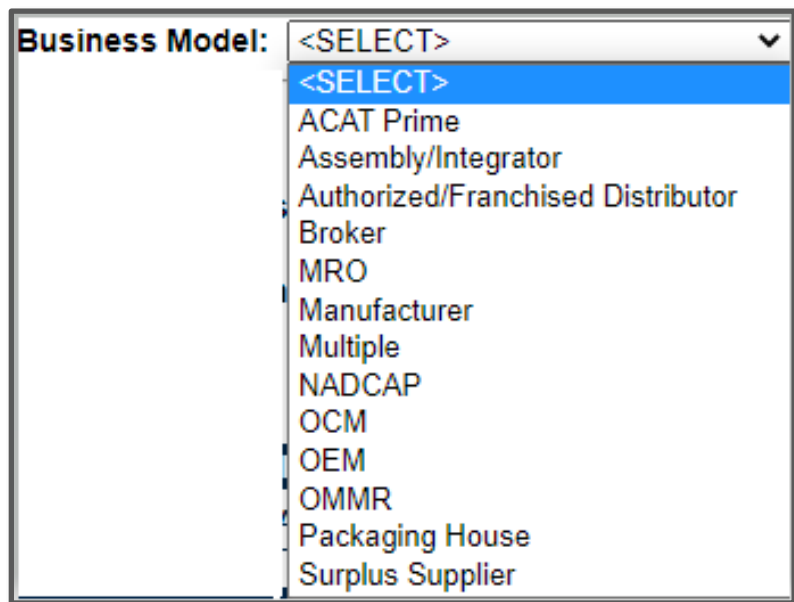


The screenshot shows the "Contractor Data" form. At the top, it has a title bar "Contractor Data". Below this, there are two main sections. The first section contains the "(M) Primary Location: CPARS" and a "Business Model:" dropdown menu with "<SELECT>" as the selected option. The second section contains fields for "Sub-Location:", "Sub-Location POC:", "Sub-Location Phone Number:", and "Sub-Location E-mail:". The "Sub-Location:" field has a "CAGE" dropdown and a text input field, with a "Lookup CAGE" button next to it. The "Sub-Location POC:" field has a text input field. The "Sub-Location Business Model:" field has a dropdown menu with "<SELECT>" as the selected option. The "Sub-Location Phone Number:" field has a text input field. The "Sub-Location E-mail:" field has a text input field. At the bottom left of the form, there is an "Add Sub-Location" button.

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.



The screenshot shows the "Business Model:" dropdown menu. The dropdown is open, displaying a list of options. The first option is "<SELECT>", which is highlighted in blue. Below it are the following options: "ACAT Prime", "Assembly/Integrator", "Authorized/Franchised Distributor", "Broker", "MRO", "Manufacturer", "Multiple", "NADCAP", "OCM", "OEM", "OMMR", "Packaging House", and "Surplus Supplier".

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.

Contractor Data						
(M) Primary Location: PDREP		Business Model: ACAT Prime				
Sub-Location: <input type="text"/>		<input type="button" value="Lookup CAGE"/>				
Sub-Location POC: <input type="text"/>		Sub-Location Business Model: <SELECT>				
Sub-Location Phone Number: <input type="text"/>		Sub-Location E-mail: <input type="text"/>				
<input type="button" value="Add Sub-Location"/>						
Type	Sub-Location	Business Model	POC	Phone	E-mail	Delete
CAGE	81316	Manufacturer	TEST POC	555-555-5555	TESTEMAIL@TESTEMAIL.MIL	<input type="button" value="Delete"/>

**Figure 3.10**

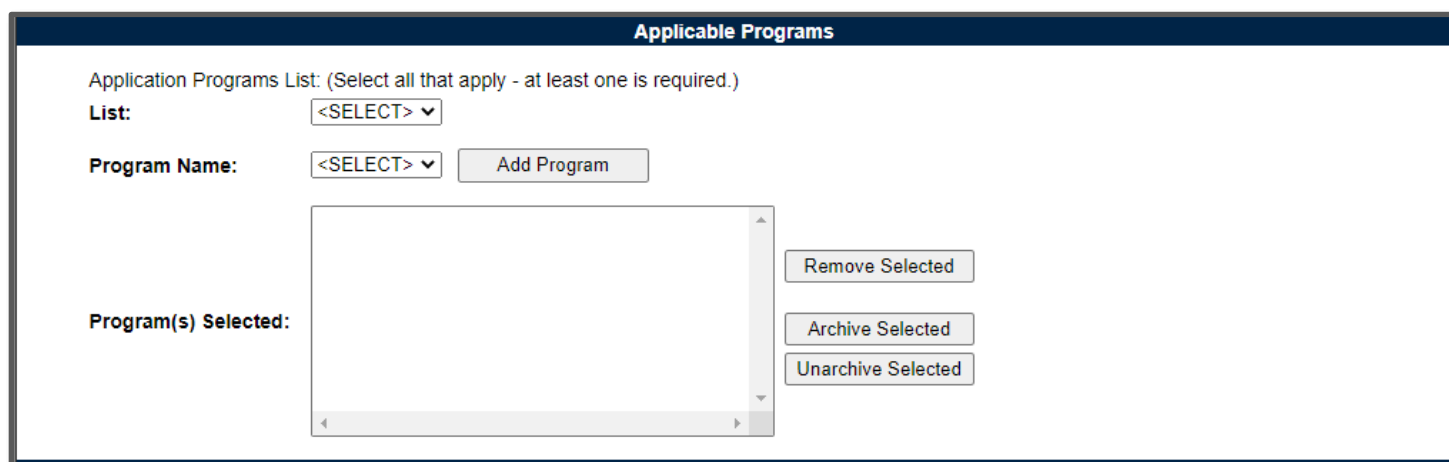
#### Associated Button Functionality for **Figure 3.10**

- **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

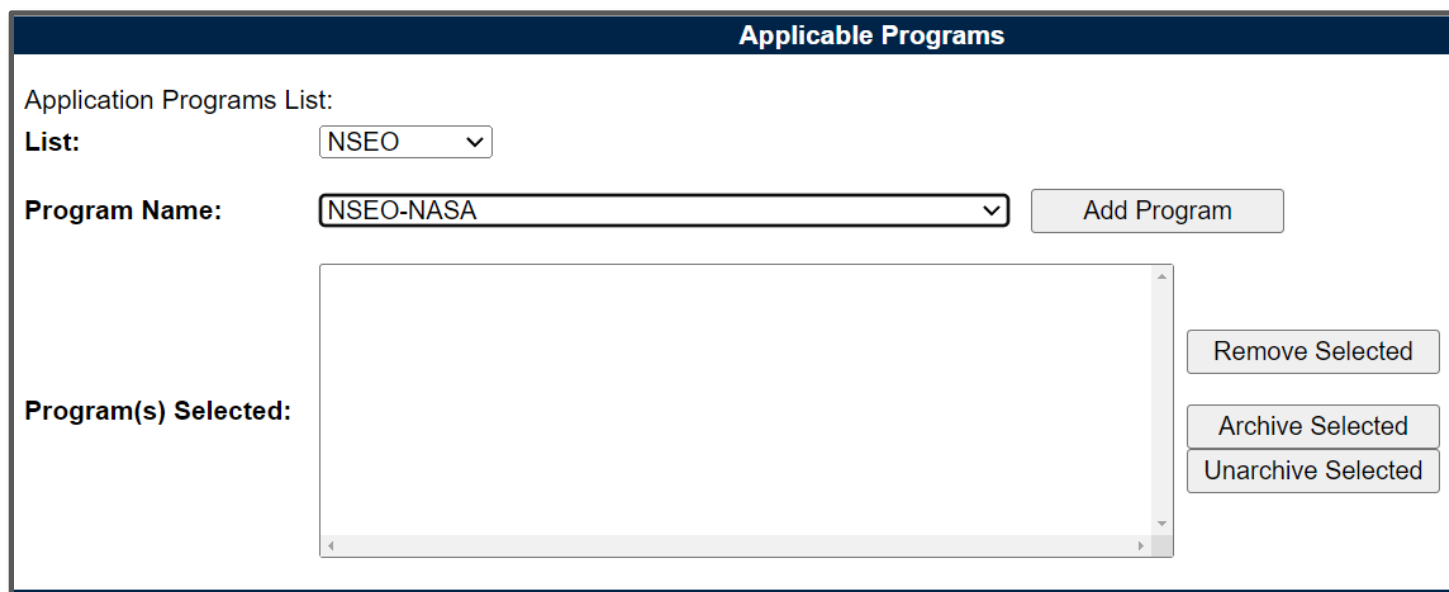
The “Applicable Programs” section of the Surveillance Plan allows for capturing the associated acquisition programs and/or platforms for which the contractor is providing material. A default view of the Applicable Program area is shown in **Figure 3.11**



The screenshot shows a web form titled "Applicable Programs". At the top, it says "Application Programs List: (Select all that apply - at least one is required.)". Below this, there is a "List:" label followed by a dropdown menu showing "<SELECT>". To the right of the dropdown is an "Add Program" button. Below the "List:" label is a "Program Name:" label followed by another dropdown menu showing "<SELECT>". To the right of this dropdown is another "Add Program" button. Below the "Program Name:" label is a large, empty list box labeled "Program(s) Selected:". To the right of this list box are three buttons: "Remove Selected", "Archive Selected", and "Unarchive Selected".

**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**.



The screenshot shows the same "Applicable Programs" form, but with changes. The "List:" dropdown now shows "NSEO". The "Program Name:" dropdown now shows "NSEO-NASA". The "Add Program" button is still present. The "Program(s) Selected:" list box remains empty. The "Remove Selected", "Archive Selected", and "Unarchive Selected" buttons are still present.

**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.

• One or more selected Programs has been assigned to a KCR and cannot be removed.

**Figure 3.14**

The screenshot shows a web interface titled "Applicable Programs". Below the title is a header "Application Programs List: (Select all that apply - at least one is required.)". There are two dropdown menus, both labeled "<SELECT>". The first is labeled "List:" and the second is labeled "Program Name:". To the right of the "Program Name:" dropdown is an "Add Program" button. Below these is a list box labeled "Program(s) Selected:". The list box contains two items: "PMBI-AEGIS ASHORE-POLAND" and "(ARCHIVED) NSEO-Level I/SUBSAFE". To the right of the list box are three buttons: "Remove Selected", "Archive Selected", and "Unarchive Selected".

**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**

- One or more selected Contracts has been assigned to a KCR and cannot be removed.

**Figure 3.19**

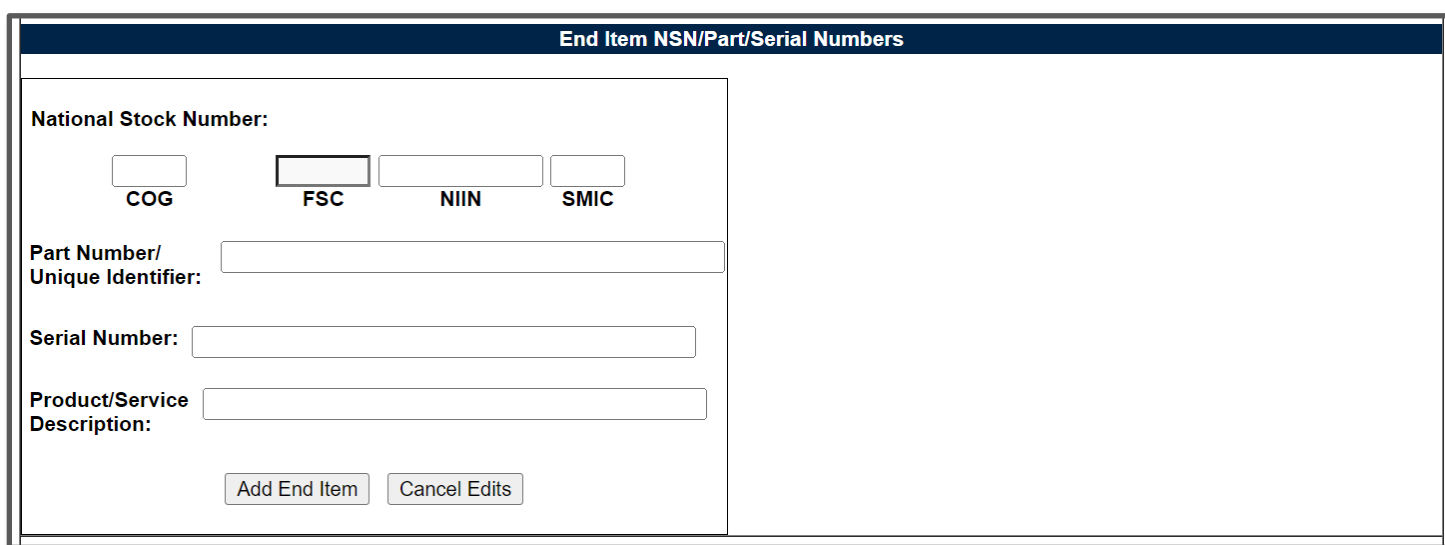
**Note:** A user must first save a new applicable contract before archiving, otherwise the plan will not save the contract.

## 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.



The screenshot shows a web-based form titled "End Item NSN/Part/Serial Numbers". The form is divided into sections for data entry. The "National Stock Number:" section includes four input fields labeled COG, FSC, NIIN, and SMIC. Below this, there are three single-line input fields for "Part Number/Unique Identifier:", "Serial Number:", and "Product/Service Description:". At the bottom of the form, there are two buttons: "Add End Item" and "Cancel Edits".

**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!

End Item NSN/Part/Serial Numbers	
National Stock Number:	
COG	9
Part Number/Unique Identifier:	
Serial Number:	
Product/Service Description:	
Add	
5961	SEMICONDUCTOR DEVICES AND ASSOCIATED HARDWARE
9680	NONFERROUS SCRAP
9310	PAPER AND PAPERBOARD
9440	MISCELLANEOUS CRUDE AGRICULTURAL AND FORESTRY PRODUCTS
9630	ADDITIVE METAL MATERIALS
7195	MISCELLANEOUS FURNITURE AND FIXTURES
3910	CONVEYORS
8950	CONDIMENTS AND RELATED PRODUCTS
AJ91	R&D- GENERAL SCIENCE/TECHNOLOGY: OTHER (BASIC RESEARCH)
AQ91	R&D- SOCIAL SERVICES: OTHER (BASIC RESEARCH)
AR91	R&D- SPACE: OTHER (BASIC RESEARCH)
AB93	R&D- COMMUNITY SERVICE/DEVELOPMENT: OTHER (ADVANCED DEVELOPMENT)
AC93	R&D- DEFENSE SYSTEM: MISCELLANEOUS HARD GOODS (ADVANCED DEVELOPMENT)

**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.

End Item NSN/Part/Serial Numbers

• NSN NIIN 010110001 is not recognized.

National Stock Number:

COG

FSC

NIIN

SMIC

Part Number/  
Unique Identifier:

Serial Number:

Product/Service  
Description:

Add End Item

Cancel Edits

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.



**National Stock Number:**

COG FSC NIIN SMIC

Part Number/  
Unique Identifier:

Serial Number:

Product/Service  
Description:

Add End Item Cancel Edits

**National Stock Number:**

AA 9999 0000000000 A0  
COG FSC NIIN SMIC

Part Number/  
Unique Identifier:

Serial Number:

Product/Service  
Description: MATERIAL, NEBULOUS

Add End Item Cancel Edits

**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.

National Stock Number:

AA

9999

000000000

A0

COG
FSC
NIIN
SMIC

Part Number/  
Unique Identifier:

User Created Text

Serial Number:

User Created Text

Product/Service  
Description:

User Created Text - - - MATERIAL, NEBULOUS

Add End Item

Cancel Edits

**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 must 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) 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!*

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
AA	9999	000000000	A0	User Created Text	User Created Text	User Created Text - - - MATERIAL, NEBULOUS	0	Edit	Delete	Archive

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) 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!

End Item NSN/Part/Serial Numbers

**National Stock Number:**

AA

9999

000000000

A0

COG          FSC          NIIN          SMIC

**Part Number/Unique Identifier:**

**Serial Number:**

**Product/Service Description:**

**(M) Product Characteristic:** -SELECT-

**(M) Description:**

**(M) Insp. Req.:** -SELECT-

**(M) Characteristic Classification:** -SELECT-

**(M) ESA Identified-CC:** -SELECT-

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
AA	9999	000000000	A0	User Created Text	User Created Text	User Created Text - - - MATERIAL, NEBULOUS	0	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="Archive"/>

**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.

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Are you sure you want to delete this End Item and any associated Product Characteristics?

**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										
<ul style="list-style-type: none"> <li>The selected <b>End Item</b> has been assigned to a Record and cannot be removed.</li> </ul>										

**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 Serial 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										
<ul style="list-style-type: none"> <li>The selected <b>End Item</b> has been assigned to a Record and cannot be archived.</li> </ul>										

**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**).

**End Item NSN/Part/Serial Numbers**

**End Item Intake**

National Stock Number:

AA COG 9999 FSC 000000000 NIIN A0 SMIC

Part Number/Unique Identifier: User Created Text

Serial Number: User Created Text

Product/Service Description: User Created Text --- MATERIAL, NEBULOUS

Update End Item Cancel Edits

**Product Characteristic Intake**

(M) Product Characteristic: -SELECT-

(M) Description:

(M) Insp. Req.: -SELECT-

(M) Characteristic Classification: -SELECT-

(M) ESA Identified-CC: -SELECT-

Add New Product Characteristics Cancel

**Product Characteristic Table**

Product Characteristic	Description	Insp. Req.	Characteristic Classification	ESA Identified	Edit	Delete
Dimension	Enter Description Here	Customer Mandatory	Critical	Yes	Edit	Delete

Save Add/View Attachments Landing Page

**End Item Table**

COG	FSC	NIIN	SMIC	Part Number/Unique Identifier	Serial Number	Product/Service Description	Product Characteristics	Edit	Delete	Archive/Unarchive
AA	9999	000000000	A0	User Created Text	User Created Text	User Created Text --- MATERIAL, NEBULOUS	0	Edit	Delete	Archive

**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.

(M) Product Characteristic: -SELECT- ▼

(M) Description:

(M) Insp. Req.: -SELECT- ▼

(M) Characteristic Classification: -SELECT- ▼

(M) ESA Identified-CC: -SELECT- ▼

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**.

**End Item NSN/Part/Serial Numbers**

- **Product Characteristic** is a mandatory field and must be provided. Please select an option from the drop down list.
- **Description** is a mandatory field and must be provided. Please enter up to 100 alphanumeric characters.
- **Insp. Req.** is a mandatory field and must be provided. Please select an option from the drop down list.
- **Characteristic Classification** is a mandatory field and must be provided. Please select an option from the drop down list.
- **ESA Identified-CC** is a mandatory field and must be provided. Please select an option from the drop down list.

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.



End Item NSN/Part/Serial Numbers										
<b>National Stock Number:</b>  <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">AA COG</div> <div style="text-align: center;">9999 FSC</div> <div style="text-align: center;">000000000 NIIN</div> <div style="text-align: center;">A0 SMIC</div> </div> <b>Part Number/ Unique Identifier:</b> <input style="width: 100%;" type="text" value="User Created Text"/>  <b>Serial Number:</b> <input style="width: 100%;" type="text" value="User Created Text"/>  <b>Product/Service Description:</b> <input style="width: 100%;" type="text" value="User Created Text - - - MATERIAL, NEBULOUS"/>  <div style="display: flex; justify-content: flex-end; gap: 10px;"> <input type="button" value="Update End Item"/> <input type="button" value="Cancel Edits"/> </div>					<b>(M) Product Characteristic:</b> <input style="width: 100%;" type="text" value="-SELECT-"/>  <b>(M) Description:</b> <input style="width: 100%;" type="text"/>  <b>(M) Insp. Req.:</b> <input style="width: 100%;" type="text" value="-SELECT-"/>  <b>(M) Characteristic Classification:</b> <input style="width: 100%;" type="text" value="-SELECT-"/>  <b>(M) ESA Identified-CC:</b> <input style="width: 100%;" type="text" value="-SELECT-"/>  <div style="display: flex; justify-content: flex-end; gap: 10px;"> <input type="button" value="Add New Product Characteristics"/> <input type="button" value="Cancel"/> </div>					
Product Characteristics										
Product Characteristic	Description	Insp. Req.	Characteristic Classification	ESA Identified	Edit	Delete				
Dimension	Enter Description Here	Customer Mandatory	Critical	Yes	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>				
<input type="button" value="Save"/> <input type="button" value="Add/View Attachments"/> <input type="button" value="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
AA	9999	000000000	A0	User Created Text	User Created Text	User Created Text - - - MATERIAL, NEBULOUS	0	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="Archive"/>

**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 must 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) 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!

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

• Your changes to this record were saved successfully

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
AA	9999	000000000	A0	USER CREATED TEXT	USER CREATED TEXT	MATERIAL, NEBULOUS	1	<div>Edit</div>	<div>Delete</div>	<div>Archive</div>

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.

- End Item edit in progress. Please update or cancel the End Item before saving the Plan.

Save

Add/View Attachments

Landing Page

**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**.

End Item NSN/Part/Serial Numbers

National Stock Number:

AA

9999

000000000

A0

COG
FSC
NIIN
SMIC

Part Number/  
Unique Identifier:

User Created Text

Serial Number:

User Created Text

Product/Service  
Description:

MATERIAL, NEBULOUS

Update End Item

Cancel Edits

(M) Product Characteristic:

Other

(M) Description:

Another Description

(M) Insp. Req.:

DCMA Risk Based

(M) Characteristic Classification:

Unknown

(M) ESA Identified-CC:

N/A

Update Product Characteristic

Cancel

Product Characteristics

Product Characteristic	Description	Insp. Req.	Characteristic Classification	ESA Identified	Edit	Delete
Dimension	Description Entered Here	Customer Mandatory	Critical	Yes	Edit	Delete
Other	Another Description	DCMA Risk Based	Unknown	N/A	Edit	Delete

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
	1990			TEST	12-345-6789	MISCELLANEOUS VESSELS	4	Edit	Delete	Archive
AA	9999	000000000	A0	User Created Text	User Created Text	MATERIAL, NEBULOUS	2	Edit	Delete	Archive

**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.

pdrep.csd.disa.mil says

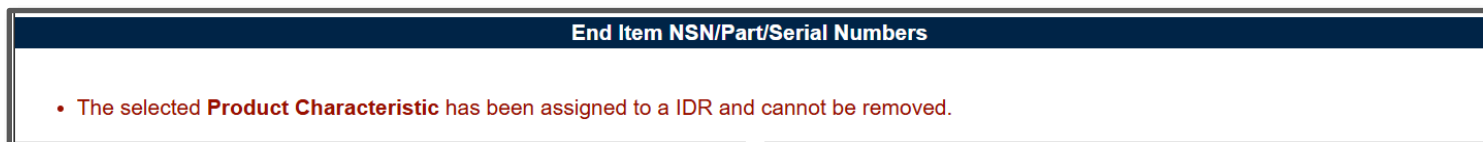
Are you sure you want to delete the selected Product Characteristic?

OK

Cancel

**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 must 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) 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!

### 3.2.8 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 display 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.

End Item NSN/Part/Serial Numbers

National Stock Number:

AA

9999

0000000000

A0

COG

FSC

NIIN

SMIC

Part Number/  
Unique Identifier:

Serial Number:

Product/Service  
Description:

MATERIAL, NEBULOUS

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
AA	9999	0000000000	A0			MATERIAL, NEBULOUS	4	Edit	Delete	Archive

**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 disallows the duplicate End Item from being applied to the table as seen in **Figure 3.41**.

51

pdrep.csd.disa.mil says

End Item already exists and may be edited by selecting the Edit button

OK

Unarchive Selected

- Duplicate End Items are not permitted.

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
AA	9999	000000000	A0			MATERIAL, NEBULOUS	4	Edit	Delete	Archive

Figure 3.41

Existing End Items should be reviewed before a similar entry is applied to the End Item Table. This helps to avoid inadvertently 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.



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
AA	9999	000000000	A0			MATERIAL, NEBULOUS	4	Edit	Delete	Archive
AA	9999	000000000	A0	0000-0000	00-11-00-11	MATERIAL, NEBULOUS	4	Edit	Delete	Archive

**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:**

**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	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="Archive"/>
AA	9999	000000000	A0			MATERIAL, NEBULOUS	4	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="Archive"/>
AA	9999	000000000	A0			MATERIAL, NEBULOUS	0	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="Archive"/>
AA	9999	000000000	A0	0000-0000	00-11-00-11	MATERIAL, NEBULOUS	4	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="Archive"/>
AA	9999	000000000				NEBULOUS	0	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="button" value="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			
<a href="#">N39040-20230001</a>	Y	YES	05/25/2023	HYDROSTATIC TESTING	05/25/2023	SATISFACTORY			
MATERIAL INSPECTION RECORD (1 Year)									
MIR #	Quantity Received		Quantity Rejected		Inspection Date				
<a href="#">N45112-23112312</a>	1		1		08/22/2022				
<a href="#">N45112-21002122</a>	10		3		08/31/2022				
<a href="#">N39040-22012003</a>	1		0		01/12/2023				
<a href="#">N39040-23129004</a>	10		10		05/09/2023				
<a href="#">N39040-23130002</a>	10		10		05/10/2023				
<a href="#">N39040-23145001</a>	1		0		05/25/2023				
<a href="#">N39040-23145002</a>	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
<a href="#">N45112-230010</a>	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 on 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.

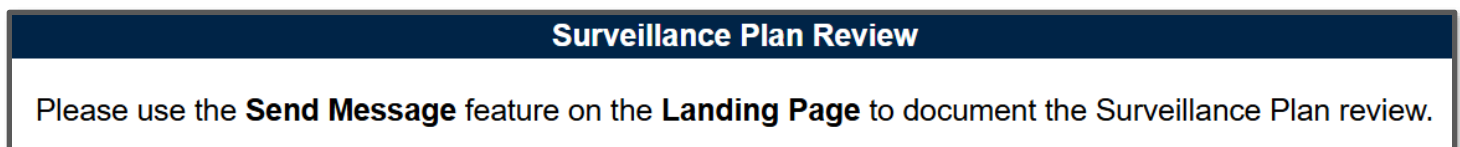
### 3.2.9.5 Product Quality Deficiency Report

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.

The screenshot displays the 'Surveillance Plan Landing Page' with a navigation bar at the top containing links: 'Surveillance Plan Worklist', 'Create Surveillance Plan', 'Surveillance Schedules', 'Surveillance Records', and 'Surveillance Plan Ad Hoc Reports'. On the left, a sidebar has 'QUICK VIEWS' (with 'History' selected) and 'ATTACHMENTS' (with 'View/Upload Files (0)' selected). The main content area shows plan details: 'CAGE Code: PDREP', 'Company Name: TEST COMPANY NSLC PORTSMOUTH PDREP TEAM', 'Status: Active', 'Assigned Team Code(s): PD - REP / PH - TDM', and 'Last Action: SURVEILLANCE PLAN KCR UPDATED on 11/25/2024'. Below this, there are buttons for 'Scheduler', 'Edit KTR Details', 'View KTR Details', 'Records', and 'KCR Table'. At the bottom, there is a 'Message Type' dropdown menu set to '-SELECT-' and a 'Send Message' button.

**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.

Activate/Close-Out Surveillance Plan

Date SP Activated: 01/31/2024

User: PDREP USER

Archive SP

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**.

QUICK VIEWS

History

ATTACHMENTS

View/Upload Files (0)

Surveillance Plan Landing Page

CAGE Code: PDREP

Company Name: PDREP CO

Status: Archived

Assigned Team Code(s): PDREP - REP

Last Action: SURVEILLANCE PLAN CLOSED on 12/06/2024

Scheduler

Records

KCR Table

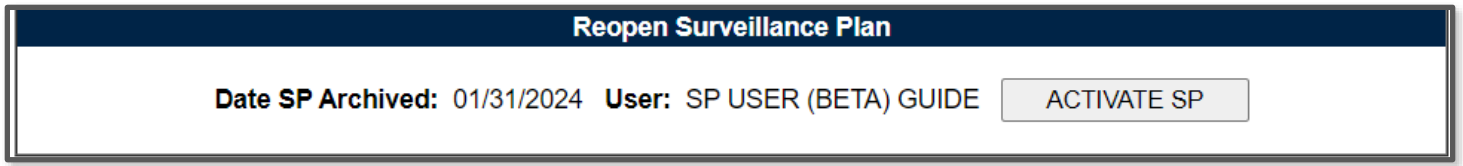
View KTR Details

Message Type: -SELECT-

Send Message

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**.

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)

Home • Help ▶

Surveillance Plan Worklist

Create Surveillance Plan

Surveillance Schedules

Surveillance Records

Surveillance Plan Ad Hoc Reports

User Profile: USER (ALPHA) GUIDE ▶ • Logout

QUICK VIEWS

History

ATTACHMENTS

View/Upload Files (0)

Surveillance Plan Landing Page

CAGE Code: 81316

Company Name: PORTSMOUTH NAVAL SHIPYARD

Status: Active

Assigned Team Code(s): PD - REP

Last Action: SURVEILLANCE PLAN KCR ADDED on 10/11/2023

Edit KTR Details

View KTR Details

Scheduler

Records

KCR Table

Message Type: -SELECT-

Send Message

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).

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)

Home • Help ▶

Surveillance Plan Worklist

Create Surveillance Plan

Surveillance Schedules

Surveillance Records

Surveillance Plan Ad Hoc Reports

User Profile: BETA (BETA) USER ▶ • Logout

Multi-Function Surveillance Plan

Landing Page

• REQUESTED DETAILS ARE CURRENTLY IN USE BY USER E-MAIL: TEST.BETA.USER@MAIL.MIL AND NOT AVAILABLE TO BE EDITED AT THIS TIME.

Primary CAGE: PDREP - PDREP CO

Status: Active

Date Surveillance Plan Last Updated: 01/31/2024



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**.

The screenshot displays a web interface titled "Multi-Function Surveillance Plan". At the top, there are three buttons: "Acquire Record", "Release Record", and "Landing Page". Below these buttons, a red notification message states: "• REQUESTED DETAILS ARE CURRENTLY IN USE BY [USER] E-MAIL: [User's Email Address] AND NOT AVAILABLE TO BE EDITED AT THIS TIME." Below the notification, the text "Primary CAGE: PDREP - PDREP CO" is shown. At the bottom, the status is "Status: Active" and the "Date Surveillance Plan Last Updated: 02/02/2024".

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**.

The screenshot displays a web interface titled "Multi-Function Surveillance Plan". A red notification message states: "• REQUESTED DETAILS ARE CURRENTLY IN USE BY [USER] E-MAIL: [User's Email Address] AND NOT AVAILABLE TO BE EDITED AT THIS TIME." Below this, a red message reads: "Permission to update this record has been assigned to another user. Edits on the page have been retained. Please try again later." At the bottom, there are three buttons: "Save", "Add/View Attachments", and "Landing Page".

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**.

Create a DCMA Multi-Function Surveillance Plan

KTR DETAILS IS CURRENTLY IN USE BY [USER ID]: [USERS Email Address] AND IS NOT AVAILABLE TO BE EDITED AT THIS TIME.

Permission to update this record has been assigned to another user. Edits on the page have been retained. Please try again later.

Save

Add/View Attachments

Landing Page

Primary CAGE/UEI: PDREP - NSLC PORTSMOUTH PDREP TEAM

Status: Draft

Date Surveillance Plan Last Updated: 06/20/2023

Primary Location POC Name: PDREP TEST PLAN

Primary Location POC Title: PDREP TEST PLAN

Primary Location POC Email: PDREP\_TEST\_PLAN@TESTING.COM

Primary Location POC Phone: 8005551234

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**.

Multi-Function Surveillance Plan	
<a href="#">Save</a>	<a href="#">Add/View Attachments</a>
<a href="#">Landing Page</a>	
<b>Primary CAGE:</b> 81316 - PORTSMOUTH NAVAL SHIPYARD	
<b>Status:</b> Active	<b>Date Surveillance Plan Last Updated:</b> 10/11/2023

**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).

The screenshot shows the 'PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)' interface. At the top, there's a navigation bar with links: Home, Help, and a user profile section showing 'USER (ALPHA) GUIDE' and a 'Logout' button. Below the navigation bar is a tabbed interface with tabs for 'Surveillance Plan Worklist', 'Create Surveillance Plan', 'Surveillance Schedules', 'Surveillance Records', and 'Surveillance Plan Ad Hoc Reports'. The 'Surveillance Plan Worklist' tab is active, displaying the 'Surveillance Plan Landing Page'. On the left side of the landing page is a sidebar with 'QUICK VIEWS' (History) and 'ATTACHMENTS' (View/Upload Files (0)). The main content area displays plan details: CAGE Code: 81316, Company Name: PORTSMOUTH NAVAL SHIPYARD, Status: Active, Assigned Team Code(s): PD - REP, and Last Action: SURVEILLANCE PLAN KCR ADDED on 10/11/2023. Below this information are several buttons: 'Scheduler', 'Edit KTR Details', 'View KTR Details', 'Records', 'KCR Table', and a 'Message Type' dropdown menu set to '-SELECT-' with a 'Send Message' button. At the bottom of the page, a footer indicates 'PDREP-AIS Version : 6.0.28.293, Build Date : 10/11/2023'.

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**.

**PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)**

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

Surveillance Plan Worklist Create Surveillance Plan Surveillance Schedules Surveillance Records Surveillance Plan Ad Hoc Reports

### Send Message

**(M) Mandatory Field**

1. Enter email address of Recipient or To Email List must have an email address.
2. Select an activity from Add Email to TO/CC and click on Get List button. Select an email address from the list and click Add TO Email or Add CC Email button to add to the To Email List list or CC Email List list.
3. If email address is not available in the list to add to the CC list then enter the email address in the CC: field and click Add CC Email: CC button to add to the CC Email List.
4. Click on Send button to send email.
5. Click Cancel to return to previous page

Send Cancel

CAGE Code: 81316

This correspondence will be sent to the following recipients

To:  Add To Email: To List

Add Email to TO/CC: N45112 - NAVSEALOGCEN PORTSMOUTH NH ▼

RANDOM (ALPHA) USER – randomuser@navy.mil

Add TO Email Add CC Email

Add CC Email: CC List

SI  ▼

**Content:**

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><BR/><BR/><BR/>

Send Cancel

**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 initiate the creation of the correspondence and open the “Send Message” page.

The screenshot displays the 'Surveillance Plan Landing Page' within the 'PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)'. The top navigation bar includes links for Home, Help, and User Profile (USER (ALPHA) GUIDE) with a Logout option. The main content area shows the following details:

- CAGE Code: 81316
- Company Name: PORTSMOUTH NAVAL SHIPYARD
- Status: Active
- Assigned Team Code(s): PD - REP
- Last Action: SURVEILLANCE PLAN KCR ADDED on 10/11/2023

Below the details, there are several buttons: Scheduler, Edit KTR Details, View KTR Details, Records, and KCR Table. At the bottom, the 'Message Type' is set to 'Message To Supervisor' in a dropdown menu, and the 'Send Message' button is highlighted with a yellow arrow, indicating it is the active button for initiating correspondence.

**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.



**PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)**

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

Surveillance Plan Worklist | Create Surveillance Plan | Surveillance Schedules | Surveillance Records | Surveillance Plan Ad Hoc Reports

---

**Send Message**

**(M) Mandatory Field**  
 1. Enter email address of Recipient or To Email List must have an email address.  
 2. Select an activity from Add Email to TO/CC and click on Get List button. Select an email address from the list and click Add TO Email or Add CC Email button to add to the To Email List list or CC Email List.  
 3. If email address is not available in the list to add to the CC list then enter the email address in the CC: field and click Add CC Email: CC button to add to the CC Email List.  
 4. Click on Send button to send email.  
 5. Click Cancel to return to previous page

Send Cancel

CAGE Code: 81316

**This correspondence will be sent to the following recipients**

To:  Add To Email: To List

Add Email to TO/CC: N45112 - NAVSEALOGCEN PORTSMOUTH NH ▼  
 RANDOM (ALPHA) USER – randomuser@navy.mil  
 Add TO Email Add CC Email

CC:  Add CC Email: CC List

Subject: SEND CORRESPONDENCE TO SUPERVISOR ▼

Content: 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><BR/><BR/><BR/>

Send Cancel

**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**.



- At least one TO Email Address is required to send this email

**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.

The screenshot displays an email composition form with the following elements:

- CAGE Code:** 81316
- Title:** This correspondence will be sent to the following recipients
- To:** A text input field with an "Add To Email: To List" button.
- Add Email to TO/CC:** A dropdown menu showing "N45112 - NAVSEALOGCEN PORTSMOUTH NH". Below it is a scrollable list of email addresses, including "FIRST (ALPHA) LAST - anonymous@navy.mil".
- Buttons:** "Add TO Email" and "Add CC Email" are located below the email list.
- TO Email List:** A section containing a dropdown menu showing "RANDOM (ALPHA) USER - randomuser@pa" and a "Remove" button.
- CC:** A text input field with an "Add CC Email: CC List" button.
- Subject:** A dropdown menu showing "SEND CORRESPONDENCE TO SUPERVISOR".

**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

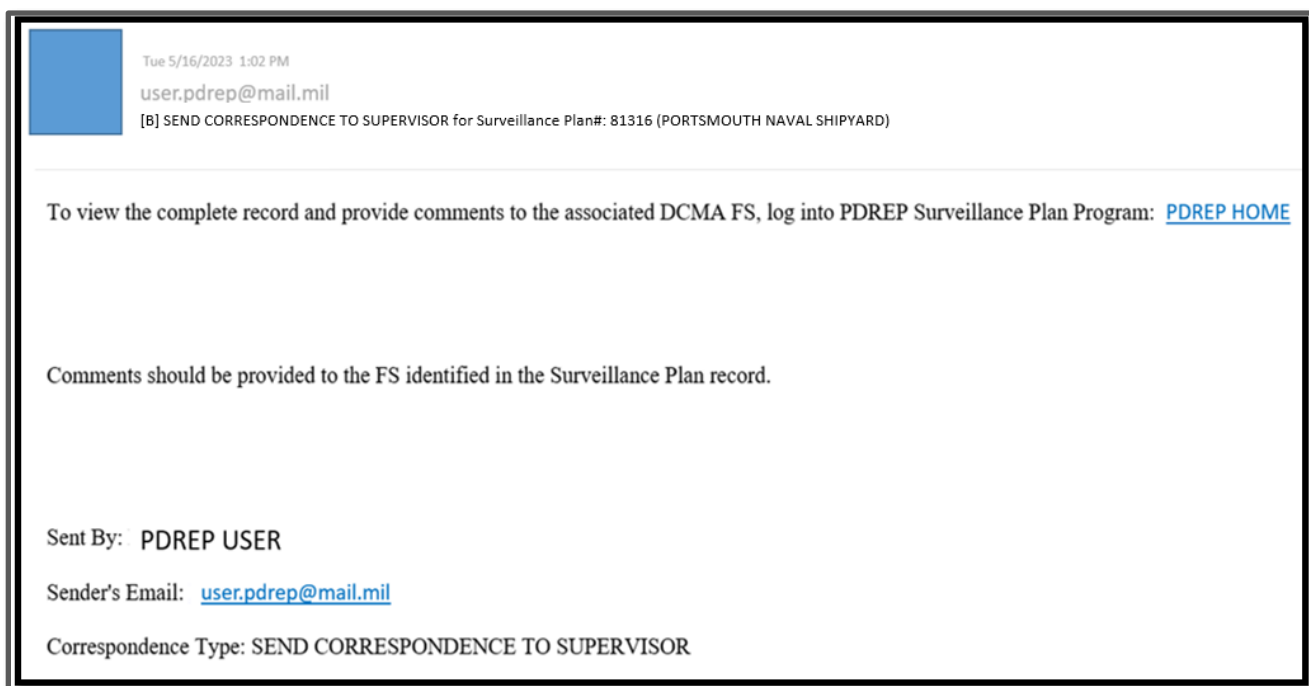
Regardless of the selected type, the body of the stock correspondence is the same for both the General Message and Send Correspondence to Supervisor (**Figure 5.7**).

**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 <BR/> 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**.



**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**

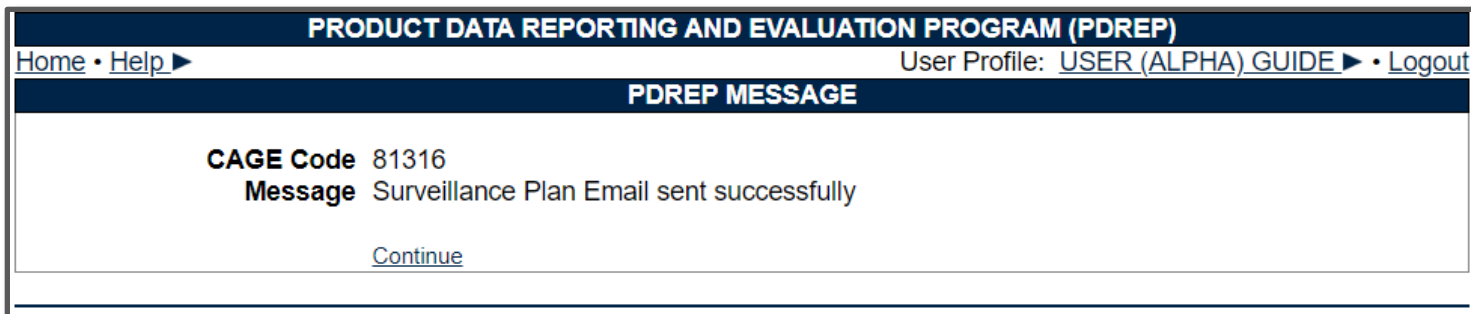
---

- **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**).

- Click "Add To Email: To List" button to add the email to the list

**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	<a href="#">USER (ALPHA) GUIDE</a>	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.

CUI Marking	Limited Distribution Control (LDC)	File Name	Attachment UID	File Size (MB)	Description	Comments	Added Date	Uploaded By	Edit	Delete
<div>Back Add Attachment</div>										

**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 Attaching a File in PDREP, found on the PDREP website under “References” and housed within “Guides and Manuals”.





## 6 SURVEILLANCE SCHEDULES

Surveillance Schedules was designed as a tool to ensure the correct type of oversight is completed efficiently and on time. Through automated forecasting, users are provided an anticipated series (schedule) of surveillance occurrences. An occurrence is one, singular anticipated oversight based off the KCR start date and multiplied by the frequency, per assigned FS. The anticipated oversight also known as an occurrence, begins populating in the Scheduler via the KCR start date. The anticipated series also known as reoccurrence takes the “Frequency of Surveillance” and multiplies that against the start date.

### 6.1 Schedules

Not all KCRs generate a returned schedule. Schedules are based off a specific formula of forecasting oversight when Surveillance is Warranted and Not Delegated (**Figure 6.1**).

The initial date of an oversight (also known as an “Occurrence”) begins on the Start Date entered within the KCR. The anticipated series (also known as a “Reoccurrence”), takes the first occurrence (Start Date) and multiplies it by the KCR’s Frequency of Surveillance to provide a schedule of oversight per assigned FS. These reoccurrences will continue to populate up to (but not including) the KCR’s End Date.

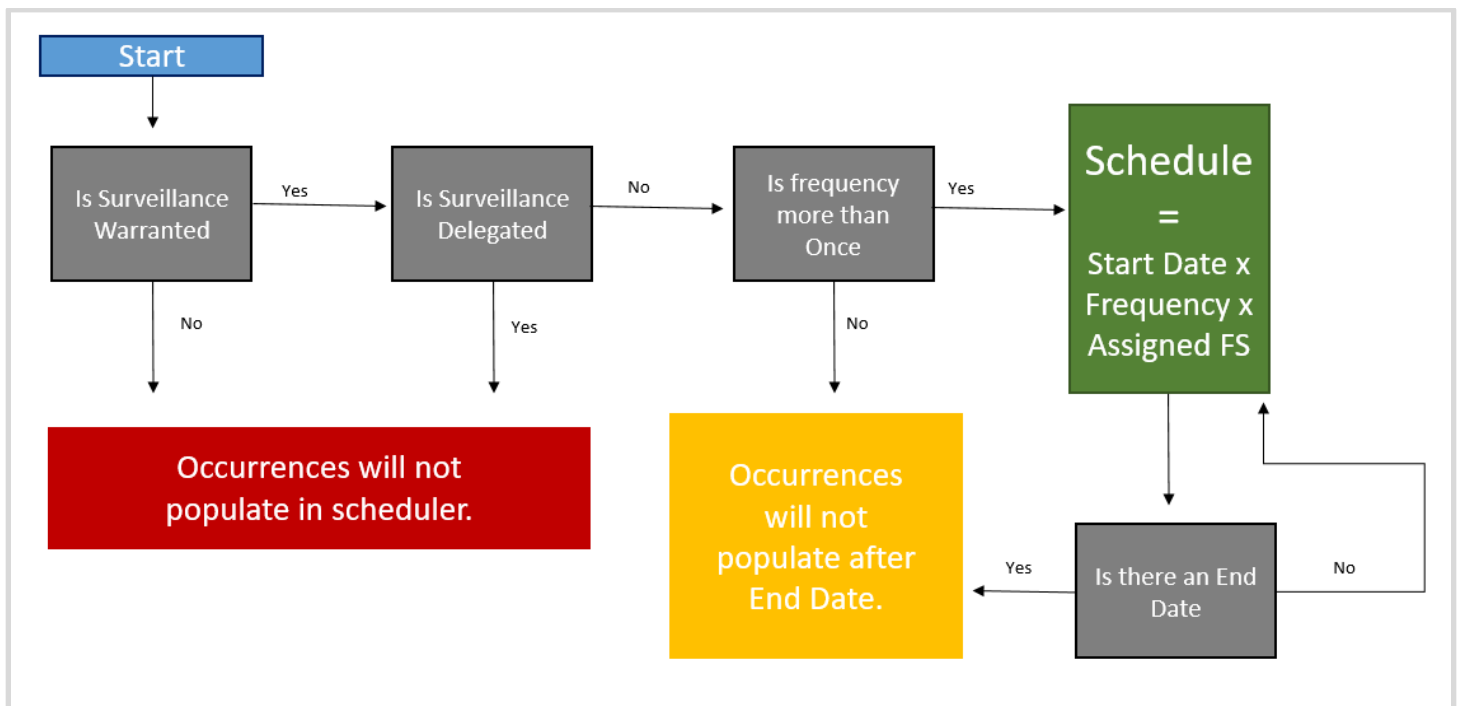
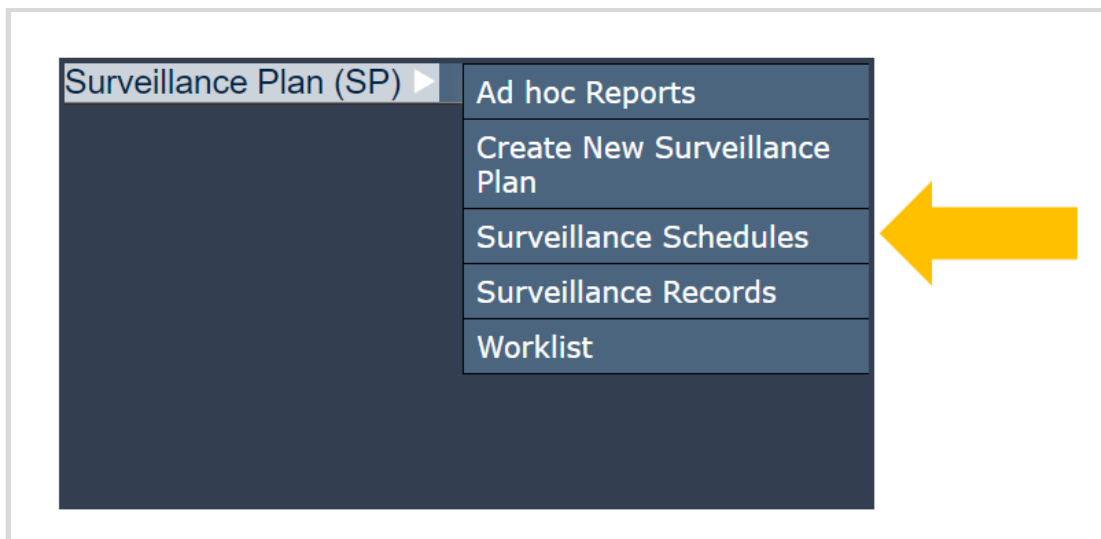


Figure 6.1

### 6.2 Accessing SP Schedules

On the PDREP Home Page, select “Surveillance Schedules” from the “Surveillance Plan (SP)” fly-out (**Figure 6.2**). The default page of Surveillance Schedules will generate as shown in **Figure 6.3**. This basic view does not prepopulate any data field.



**Figure 6.2**

**PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)**

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

Surveillance Plan Worklist Create Surveillance Plan **Surveillance Schedules** Surveillance Records Surveillance Plan Ad Hoc Reports

**Surveillance Plan Schedules**

[Instructions](#)

(M) Primary CAGE:   (M) User ID:

(M) CMT DoDAAC:  (M) Team Code:

(M) KCR UID:  (M) Functional Area:

(M) Planned Start Date: From   To   (4 year maximum search allowed)

☐ Display Results in Multi-Cancel Mode

Filter By: **Status:**  **Contract:**

**Delegated:**  **Program:**

Sort By:

< Prev Page 0 of 0 Next > Result count: 0  rows per page

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
No Data Match for Search/Filter Criteria													

**Figure 6.3**

When the blue “Instructions” hyperlink is clicked in **Figure 6.3**, the Scheduler instructions will show fully for the user (**Figure 6.3a**). To hide the instructions, the user can click the blue “Instructions” hyperlink again.

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)	
Home • Help ▶	User Profile: SP USER (ALPHA) GUIDE ▶ • Logout
Surveillance Plan Worklist	Create Surveillance Plan
Surveillance Schedules	Surveillance Records
Surveillance Plan Ad Hoc Reports	
Surveillance Plan Schedules	
<a href="#">Instructions</a> <p>(M) denotes a mandatory field</p> <ol style="list-style-type: none"> <li>1. Enter KCR UID or 2 mandatory fields</li> <li>2. A Planned Start Date: From and To must be used</li> <li>3. Correct format for Date is MM/DD/YYYY or use the Calendar</li> <li>4. Click Display Worklist button</li> </ol> <p>Note: Filtering capabilities available after initial search.</p>	
(M) Primary CAGE:	<input type="text"/> <input type="button" value="Lookup"/>
(M) User ID:	<input type="text"/>
(M) CMT DoDAAC:	<input type="text"/>
(M) Team Code:	<input type="text"/>
(M) KCR UID:	<input type="text"/>
(M) Functional Area:	<SELECT> ▼
(M) Planned Start Date:	From <input type="text" value="02/05/2024"/> <input type="button" value="Calendar"/> To <input type="text" value="03/06/2024"/> <input type="button" value="Calendar"/> (4 year maximum search allowed)
<input type="button" value="Display Schedule Worklist"/>	

Figure 6.3a

If already working in the application, select the “Surveillance Schedules” tab at the top of the page, or use the navigational button labeled “Scheduler” (Figure 6.4). When accessing the Surveillance Schedules Page from the tab, the default view, as shown in Figure 6.4, will generate. However, using the navigational buttons located within the Plan, three data fields (Primary CAGE, User ID and Team Code) will prepopulate. These values draw from the user’s profile and the CAGE Code being worked.

Surveillance Plan Landing Page	
<div> <div>Surveillance Plan Worklist</div> <div>Create Surveillance Plan</div> <div>Surveillance Schedules</div> <div>Surveillance Records</div> <div>Surveillance Plan Ad Hoc Reports</div> </div> <div> <div>QUICK VIEWS</div> <div>History</div> </div> <div> <div>ATTACHMENTS</div> <div>View/Upload Files (0)</div> </div>	<div> <div>CAGE Code: PDREP</div> <div>Company Name: PDREP CO</div> <div>Status: Draft</div> <div>Assigned Team Code(s): PD - REP</div> <div>Last Action: SURVEILLANCE PLAN KCR UPDATED on 05/27/2023</div> </div> <div> <div>Scheduler</div> <div>Edit KTR Details</div> <div>Records</div> <div>View KTR Details</div> <div>KCR Table</div> <div>           Message Type: -SELECT- ▼           <input type="button" value="Send Message"/> </div> </div>

Figure 6.4

## 6.3 SP Schedules Page

Surveillance Schedules Page (also known as the Scheduler), has a default view and a populated view. The default view does not prepopulate any of the field criteria required to generate a schedule, whereas the populated view contains the CAGE Code currently being worked, the User ID and Team Code as pulled from the user profile. Both display types contain three distinct sections:

1. Creating a Schedule
2. Filtering the Schedule
3. Schedule

**Note:** Populated Schedules contain a “Landing Page” button which navigates the user back to the Landing Page of the Plan being worked (**Figure 6.5**).

**Figure 6.5**

### 6.3.1 Creating a Schedule

Top of the page shows data fields that may be used when creating a schedule. Both the Scheduler’s default and populated display contain a date range of 30 days from today’s date. The date range is used to identify which occurrences should populate. Any occurrence on or within the dates entered will display within the returned schedule as shown in **Figure 6.6**.

Two of the mandatory data fields must be used for the schedule to return a worklist. However, the KCR UID field does not need a second field to search alongside when used (except the date range). The date range must not exceed four years, otherwise the user will receive an error message.

Select the “Display Schedule Worklist” button to create the schedule. Once the two mandatory values are satisfied (unless searching by just KCR UID) and a date range is present, what populates below the filtering section is the returned Schedule as determined by the Reoccurrence Formula.

**PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)**

Home • Help ► User Profile: SP USER (BETA) GUIDE ► Logout

Surveillance Plan Worklist | Create Surveillance Plan | Surveillance Schedules | Surveillance Records | Surveillance Plan Ad Hoc Reports

### Surveillance Plan Schedules

[Instructions](#)

(M) Primary CAGE: PDREP  (M) User ID:

(M) CMT DoDAAC:  (M) Team Code:

(M) KCR UID:  (M) Functional Area: Aircraft Operations ▼

(M) Planned Start Date: From 02/05/2024  To 03/06/2024  (4 year maximum search allowed)

Search Results Download: Click [here](#) to download data in spreadsheet ☐ Display Results in Multi-Cancel Mode

Filter By: Status: N/A ▼ Contract: <SELECT> ▼

Delegated: No ▼ Program: <SELECT> ▼

Sort By: Planned Start Date (Ascending) ▼

< Prev Page 1 of 1 Next > Result count: 24 50 ▼ rows per page

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	DPE	1	1	02/05/2024	02/06/2024	-1	[User ID]	Resched/Can -- <input type="button" value="New Rcd"/> <input type="button" value="View Rcd"/>
---	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	DPE	1	1	02/06/2024	02/07/2024	-2	[User ID]	Resched/Can -- <input type="button" value="New Rcd"/> <input type="button" value="View Rcd"/>
---	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	DPE	1	1	02/07/2024	02/08/2024	-3	[User ID]	Resched/Can -- <input type="button" value="New Rcd"/> <input type="button" value="View Rcd"/>

**Figure 6.6**

#### Associated Data Fields for **Figure 6.6**

- **(M) CMT DoDAAC:** Organization assigned to the Prime Location for Surveillance.
- **(M) Functional Area:** Dropdown list based on the sixteen Functional Areas.
  - i. Aircraft Operations
  - ii. Contract Safety
  - iii. Contracts
  - iv. Cost & Pricing
  - v. Earned Value
  - vi. Earned Value Analysis
  - vii. Engineering
  - viii. Manufacturing
  - ix. NASA Quality Assurance
  - x. NSEO Quality Assurance
  - xi. Packaging
  - xii. Plant Clearance
  - xiii. Property Administration
  - xiv. Quality Assurance
  - xv. Small Business

- xvi. Software Acquisition Management
- xvii. Transportation

- **(M) Planned Start Date (Date Range):** Date range will default to a 30-day query starting with “todays” date. This editable field will generate occurrences on or within the dates provided up to four years.
  - **From:** Start date of query. Defaults to “todays” date, then forecasts 30 calendar days out and is editable by user.
  - **To:** Ending point of query and is editable by user.
    - i. Query cannot be performed without a start or end date. The user will receive the standard error message if one of the dates is not present and queried (**Figure 6.6a**).

**PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)**

Home • Help ►
User Profile: [SP USER \(BETA\) GUIDE](#) ► • [Logout](#)

[Surveillance Plan Worklist](#) | [Create Surveillance Plan](#) | [Surveillance Schedules](#) | [Surveillance Records](#) | [Surveillance Plan Ad Hoc Reports](#)

**Surveillance Plan Schedules**

[Instructions](#)

- Searches require that both a From and To Date be provided.

**(M) Primary CAGE:**

**(M) CMT DoDAAC:**

**(M) KCR UID:**

**(M) User ID:**

**(M) Team Code:**

**(M) Functional Area:**

**(M) Planned Start Date:** From  To  (4 year maximum search allowed)

☐ Display Results in Multi-Cancel Mode

Filter By: **Status:**

**Delegated:**

Sort By:

**Contract:**

**Program:**

< Prev Page 0 of 0 Next >
Result count: 0
50 rows per page

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
No Data Match for Search/Filter Criteria													

**Figure 6.6a**

- ii. Maximum return will be 4 years of the “From” date entered and concluding on the “To” date entered. For instance, if the start date entered is 01/10/2050 the end date cannot exceed 01/10/2054.
- **(M) Primary CAGE:** CAGE Code of the contractor to whom the Surveillance Plan is attributed.
- **(M) Team Code:** Team Codes based on Assigned Functional Specialists found within the Plan’s KCRs.
- **(M) User ID:** Assigned Functional Specialist within the KCR.

## Associated Buttons for Figure 6.6

- **Landing Page:** Navigates the user back to the Landing Page of the Plan being worked.
- **Display Schedule Worklist:** Will display the returned Schedule based on the criteria entered and the date range used.

### 6.3.2 Filtering The Schedule

The second section of the Surveillance Plan Schedules page is where the primary query may be filtered, allowing the user to view a more detailed return (**Figure 6.7**). The filtering dropdowns generate their returned values based on the entries made when creating a schedule.

**Note:** A combination of *Primary CAGE*, *CMT DoDAAC*, *Assigned FS ID*, *Assigned FS Team Code* or *Functional Area* and a *Date Range* must be queried first and register a returned schedule to have additional filtering options populate.

The screenshot shows the top section of the Surveillance Plan Schedules page. It includes a filter bar with the following elements:

- Filter By:** A section containing three dropdown menus: **Status:** (N/A), **Delegated:** (N/A), and **Contract:** (N/A).
- Sort By:** A dropdown menu set to **Planned Start Date (Ascending)**.
- Buttons:** **Apply** and **Reset** buttons.
- Program:** A dropdown menu set to **N/A**.

Below the filter bar, there is a pagination section showing **< Prev**, **Page 0 of 0**, **Next >**, **Result count: 0**, and a **50** rows per page dropdown.

The table below has the following columns:

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
--------	------	---------	-----	-------	----------	---------------	------------------	------------------	--------------------	----------	---------------	-----------------	------------------------------

Figure 6.7

## Associated Filters for Figure 6.7

- **Status:** Dropdown which may include the following depending what statuses are in the return:
  - **---**: This status denotes an anticipated oversight that does not have a related Record (DPE/DSE/PE/SPE).
  - **--- Overdue:** This status denotes an anticipated oversight that does not have a related Record (DPE/DSE/PE/) and is considered overdue. The occurrence will be marked overdue when the Record is completed the day after the due date.
  - **Draft:** This status denotes an oversight in process, but not yet completed. There is a draft Record associated with the occurrence.
  - **Draft Overdue:** This status denotes a Record associated to an oversight considered past due, the day after the oversight “should” have occurred based on the time between the “Start Date & Due Date” of the occurrence. The status text will turn from black (current) to red for overdue.
    - An example of this would be an oversight start date of 30 May 2023 with a weekly frequency; the due date would be 06 June 2023. The status would turn red and “Overdue” on 07 June 2023.
    - Days Over Due starts counting after the KCR is created. It will show negative numbers counting towards the Due Date in black text when today’s date does not equal to or exceed the KCR’s Due Date.

- When today's date is equal to the Due Date, "0" will be shown in black text.
- Once the Due Date passes and there is no completed Record with the scheduled occurrence, text will turn red and show a positive number counting how many days past the Due Date it has been. This will continue counting in red text until a Record is marked complete for that specific occurrence.
- It does not matter if a Record is attached to the oversight; the only consideration is if the frequency had been exceeded.
- **Complete:** This status denotes a completed oversight. All mandatory fields have been satisfied and the corresponding Record (DPE, DSE, PE, SPE) reflect as "Completed". Red text will display when the occurrence was completed after the anticipated Due Date.
- **Re-Opened:** This status denotes a Record previously marked as "complete" has been reopened.
  - "Reopen" will remain as the status and show in red font if overdue.
  - It will remain in red font as "Reopened" until the user makes the necessary changes then completes the Record again.
  - If a Record is reopened after being closed, the text color will be representative of the date's status.
  - Red text will display when the occurrence was completed after the anticipated Due Date before being reopened.

**Note:** Once a status becomes overdue, the status text becomes red and stays red regardless of any action taken.

- **Contract:** Text field allows alphanumeric characters. When six characters are entered (beginning of the contract) allows a search to be conducted, each additional character will further reduce the return. If a Program has been selected before a Contract has been entered, this field will be grayed out.
- **Delegated:** Currently set to No and not editable.
- **Program:** Dropdown display of any program associated to initial query results. If a Contract has been entered before a Program has been selected, this field will be grayed out.
- **Sort By:** The return may be sorted based on the following criteria:
  - Assigned FS (Ascending)
  - Assigned FS (Descending)
  - CAGE (Ascending)
  - CAGE (Descending)
  - Due Date (Ascending)
  - Due Date (Descending)
  - KCR UID (Ascending)
  - KCR UID (Descending)
  - Planned Start Date (Ascending)
  - Planned Start Date (Descending)

## 6.4 Table Return – Scheduler

There are two returned schedule types:

1. An individual schedule where the returned schedule is limited to a singular user (**Figure 6.8**, left-hand schedule), and
2. A group schedule where the returned schedule may show multiple users within the same Team Code or Plan (**Figure 6.8**, right-hand schedule).



### Individual

This system contains CUI

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)

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

Surveillance Plan Worklist | Create Surveillance Plan | Surveillance Schedules | Surveillance Records | Surveillance Plan Ad Hoc Reports

Surveillance Plan Schedules

(M) Primary CAGE: PDREP

(M) CMT DoDAAC:

(M) KCR UID:

(M) Planned Start Date: From 02/06/2024 To 03/07/2024 (4 year maximum search allowed)

(M) User ID: User1

(M) Team Code:

(M) Functional Area: <SELECT>

Search Results Download: Click [here](#) to download data in spreadsheet ☐ Display Results in Multi-Cancel Mode

Filter By: Status: N/A

Delegated: No

Sort By: Planned Start Date (Ascending)

Contract: N/A

Program: N/A

Result count: 4 50 rows per page

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0013 7318	KCR-QA-0024 - Inspection Systems Requirement (Navy)	---	---	DSE	18	9	02/12/2024	02/19/2024	-13	User1	Resched/Can New Rcd View Rcd
---	PDREP	0013 7318	KCR-QA-0024 - Inspection Systems Requirement (Navy)	---	---	DSE	18	9	02/19/2024	02/26/2024	-20	User1	Resched/Can New Rcd View Rcd

### Group

This system contains CUI

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)

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

Surveillance Plan Worklist | Create Surveillance Plan | Surveillance Schedules | Surveillance Records | Surveillance Plan Ad Hoc Reports

Surveillance Plan Schedules

(M) Primary CAGE: PDREP

(M) CMT DoDAAC:

(M) KCR UID:

(M) Planned Start Date: From 02/06/2024 To 03/07/2024 (4 year maximum search allowed)

(M) User ID:

(M) Team Code: TEAMCODE

(M) Functional Area: <SELECT>

Search Results Download: Click [here](#) to download data in spreadsheet ☐ Display Results in Multi-Cancel Mode

Filter By: Status: N/A

Delegated: No

Sort By: Planned Start Date (Ascending)

Contract: <SELECT>

Program: <SELECT>

Result count: 24 50 rows per page

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	---	DPE	1	1	02/06/2024	02/07/2024	-1	User1	Resched/Can New Rcd View Rcd
---	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	---	DPE	1	1	02/07/2024	02/08/2024	-2	User2	Resched/Can New Rcd View Rcd

**Figure 6.8**

Filtering an individual schedule (based off the User ID) can be done for any user and by any user as shown on the left side of **Figure 6.8**. However, functionality is restricted to the user for which the occurrence populated. This means the ability to cancel an occurrence, reschedule an occurrence, create a Record or access a Record is limited to the individual listed in the “UserID Assigned” column.

When a User ID is not entered as shown on the right side of **Figure 6.8**, a group schedule will be returned displaying all assigned Functional Specialist associated with those KCR values entered. A larger example of an individual schedule can be seen in **Figure 6.9** and a group schedule can be seen on **Figure 6.10**.

**Note:** Apart from weekly oversight, returned schedules do not take into consideration weekends or Holidays. When a weekly frequency has been determined, the Scheduler will populate occurrences for Monday thru Fridays. Otherwise, the Scheduler does not take into consideration Saturdays, Sundays, or federal holidays.

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**PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)**

Home • Help ► User Profile: SP USER (BETA) GUIDE ► Logout

Surveillance Plan Worklist Create Surveillance Plan Surveillance Schedules Surveillance Records Surveillance Plan Ad Hoc Reports

**Surveillance Plan Schedules**

Landing Page  
Instructions

(M) Primary CAGE: PDREP Lookup (M) User ID: User1

(M) CMT DoDAAC: (M) Team Code:

(M) KCR UID: (M) Functional Area: <SELECT>

(M) Planned Start Date: From 02/06/2024 To 03/07/2024 (4 year maximum search allowed)

Display Schedule Worklist

Search Results Download: Click [here](#) to download data in spreadsheet ☐ Display Results in Multi-Cancel Mode

Filter By: Status: N/A Delegated: No Contract: N/A Program: N/A

Sort By: Planned Start Date (Ascending) Apply Reset

< Prev Page 1 of 1 Next > Result count: 4 50 rows per page

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0013 7318	KCR-QA-0024 - Inspection Systems Requirement (Navy)	--	--	DSE	18	9	02/12/2024	02/19/2024	-13	User1	Resched/Can -- New Rcd View Rcd
---	PDREP	0013 7318	KCR-QA-0024 - Inspection Systems Requirement (Navy)	--	--	DSE	18	9	02/19/2024	02/26/2024	-20	User1	Resched/Can -- New Rcd View Rcd

Figure 6.9

**PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)**

Home • Help ► User Profile: SP USER (BETA) GUIDE ► Logout

Surveillance Plan Worklist Create Surveillance Plan Surveillance Schedules Surveillance Records Surveillance Plan Ad Hoc Reports

**Surveillance Plan Schedules**

Landing Page  
Instructions

(M) Primary CAGE: PDREP Lookup (M) User ID:

(M) CMT DoDAAC: (M) Team Code: TEAMCODE

(M) KCR UID: (M) Functional Area: <SELECT>

(M) Planned Start Date: From 02/06/2024 To 03/07/2024 (4 year maximum search allowed)

Display Schedule Worklist

Search Results Download: Click [here](#) to download data in spreadsheet ☐ Display Results in Multi-Cancel Mode

Filter By: Status: N/A Delegated: No Contract: <SELECT> Program: <SELECT>

Sort By: Planned Start Date (Ascending) Apply Reset

< Prev Page 1 of 1 Next > Result count: 24 50 rows per page

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	DPE	1	1	02/06/2024	02/07/2024	-1	User1	Resched/Can -- New Rcd View Rcd
---	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	DPE	1	1	02/07/2024	02/08/2024	-2	User2	Resched/Can -- New Rcd View Rcd

**Figure 6.10**

Associated Table Columns for **Figure 6.10**

---

- **Activity:** The Activity associated with the KCR for which the occurrence is referencing. Field will display as “N/A” when lacking a Surveillance Activity in the KCR.
- **CAGE:** The CAGE Code of the contractor to whom the Surveillance oversight is attributed.
- **Days Over Due:** Starts counting after KCR is created. Shows negative numbers counting towards the Due Date in black text when today’s date does not equal to or exceed the KCR’s Due Date. When today’s date is equal to the Due Date, “0” will be shown in black text. Once the Due Date passes and there is no completed Record with the scheduled occurrence, text will turn red and show a positive number counting how many days past the Due Date it has been. This will continue counting in red text until a Record is marked complete on that specific occurrence. Once complete, the number will remain the same.
  - To see a returned schedule with today’s date *prior* to the Due Date with no complete Record attached, refer to **Figure 6.11a**.
  - To see a returned schedule with today’s date *equaling* the Due Date with no complete Record attached, refer to **Figure 6.11b**.
  - To see a returned schedule with today’s date *exceeding* the Due Date with no complete Record attached, refer to **Figure 6.11c**.

**Note:** Reopened Records will have black text if reopened before the Due Date and red text if opened after the Due Date.

- **Due Date:** Currently, Due Date is by default the Start Date of the next occurrence. The date will display in black font except for those occurrences considered past due.
- **Event:** The Event associated with the KCR for which the occurrence is referencing. Field will display as “N/A” when lacking a Surveillance Event in the KCR.
- **KCR:** Key Contract Requirement Number & Description for which the occurrence is referencing.
- **KCR UID:** The 8-digit unique identifier of the KCR for which the occurrence is referencing.
- **Planned Start Date:** This field populates the date for each occurrence to start with the expectation the surveillance Record should be created on this date but does not have to be completed. Planned Start Dates are generated on a calculation of the KCR’s Start Date multiplied by the Frequency of which oversight should be performed. The date will display in black font except for those occurrences considered past due.
- **Record UID:** Unique identifier of an associated Record of the KCR.
- **Risk Rating Baseline:** The initial Risk Rating documented in the KCR for which the occurrence is referencing.
- **Risk Rating Current:** Most current Risk Rating associated with the KCR for which the occurrence is referencing.
- **Status:** The status (Draft, Overdue, Complete, etc.) of the occurrence. The values will display in black font except for those occurrences considered past due.
- **Sur. Category:** Type of surveillance evaluation (DPE, DSE, PE, SPE) identified within the KCR.

- **Surveillance Record/Actions:** Functions listed below. Functionality is restricted based on the User ID reviewing the schedule. Available options may include:
  - **Resched/Can:** Button to Cancel or Re-Schedule anticipated oversight. Users with supervisor of higher assess can reassign an occurrence to any other FS within the same DoDAAC. This button will be grayed out if a user does not have supervisor or higher access.
  - **New Rcd:** Available only to the User ID assigned, this button opens the Records Page for the type of surveillance required as determined within the KCR.
  - **View Rcd:** Button to view the associated Record (limited to users with FS or higher access). It will populate for all Records, regardless of Record status.
- **User ID Assigned:** ID of the Assigned Functional Specialist within the KCR.

**Note:** Frequencies with a start date or occurrence date of February 29th will occur as February 28th for non-leap years.

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/06/2024	02/07/2024	-1	User1	Resched/Can -- New Rcd View Rcd
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/06/2024	02/07/2024	-1	User1	Resched/Can -- New Rcd View Rcd

Figure 6.11a

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/05/2024	02/06/2024	0	User1	Resched/Can -- New Rcd View Rcd
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/05/2024	02/06/2024	0	User1	Resched/Can -- New Rcd View Rcd

Figure 6.11b

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
OVERDUE	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	DPE	1	1	01/01/2024	01/02/2024	35	User1	Resched/Can -- New Rcd View Rcd
OVERDUE	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	DPE	1	1	01/02/2024	01/03/2024	34	User1	Resched/Can -- New Rcd View Rcd

Figure 6.11c

## 6.4.1 Changes to the Schedulers' Return

Changes to the KCR trickle down and effect the KCR itself and what is shown in the Scheduler and subsequently the contents of the Record. The KCR communicates these changes to the Scheduler immediately following the KCR's "Save" action. Once the Scheduler receives notification, the anticipated oversight (aka Scheduler) will automatically adjust its return based on the current KCR's values for Start Date, Frequency, and assigned FS. This same logic is applied when a KCR is moved from Not Warranted to Warranted or when a KCR's delegation status goes from Delegated to Not Delegated.

Since Surveillance Schedules are created in "Real Time", changes to data elements used to populate occurrences will be immediately applied to the Scheduler. This is true only for occurrences lacking an attached Record. When a Record is associated to an occurrence, the Scheduler ignores changes to the KCR for that oversight, keeping the Record-attached occurrence untouched.

For instance, when a change occurs to a KCR's Start Date, the Schedules Planned Start Date, Due Date and Days Over Due will automatically adjust their values to that of the KCR for all occurrences and reoccurrences lacking a Record. Since the Scheduler ignores those occurrences with an associated Record, no change is made to the Planned Start Date, Due Date or Days Over Due for these oversights.

## 6.5 Button Functionality

Buttons available on the Surveillance Plan Schedules page and their functionality are described below.

- **Apply:** Will further filter the Scheduled Worklist based on the additional filters entered.
- **Display Schedule Worklist:** Will display the scheduled list based on the criteria entered in required data fields.
- **Landing Page:** Navigates the user to the Surveillance Plan Landing Page associated with the CAGE Code.
- **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. When a CAGE is selected from the lookup page, it populates the field associated with the button.
- **New Rcd:** Available only to the User ID Assigned, this button opens the Records Page for the type of surveillance required as determined within the KCR.
- **Open Rcd:** Available only to the User ID Assigned, this button is available after a Record has been created (**Figure 6.12**).
- **View Rcd:** Available only to the User ID Assigned, this button is clickable after a Record has been created and saved (**Figure 6.12**).
- **Re-Sched:** The button will open a new window where the user can choose to reschedule or cancel the anticipated oversight.
- **Reset:** Returns selections made to Filter & Sort back to their default status.

**Note:** Records accessed by way of the Scheduler will return the user to the Scheduler when the "Back" button is used.

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/06/2024	02/07/2024	-1	User1	<div>Resched/Can</div> <div>New Rcd</div> <div>View Rcd</div>
Draft	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/06/2024	02/07/2024	-1	User1	<div>Resched/Can</div> <div>PDREP 0224.0004</div> <div>Open Rcd</div> <div>View Rcd</div>

Figure 6.12

**Note:** The ability to Reschedule or Cancel an occurrence is restricted for Records marked in "Complete" status.

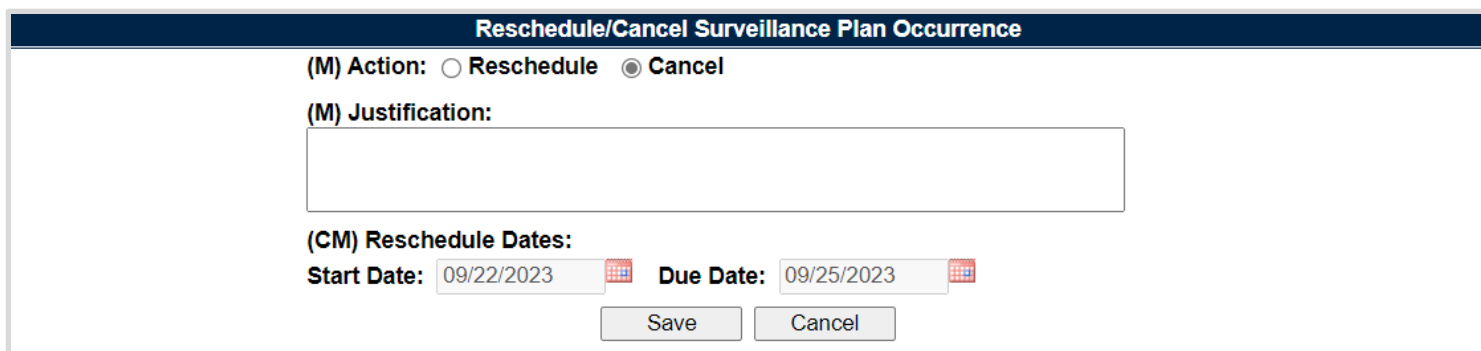
- **Reschedule:** When selected, a Justification as to why the occurrence needs to be rescheduled is required along with a new Start Date & End Date of when the occurrence will begin its oversight and conclude. Values entered do not affect any other occurrence or series of occurrences (**Figure 6.13**).
  - i. **Save:** Captures the request and reschedules the occurrence based on the new Start Date and End Date entered.
  - ii. **Cancel:** Refreshes the page and returns to the Scheduler.

Reschedule/Cancel Surveillance Plan Occurrence	
(M) Action:	<input checked="" type="radio"/> Reschedule <input type="radio"/> Cancel
(M) Justification:	<div></div>
(CM) Reschedule Dates:	<div>Start Date: 09/22/2023</div> <div>Due Date: 09/25/2023</div>
	<div>Save</div> <div>Cancel</div>

Figure 6.13

- **Cancel:** When selected, Rescheduled Date fields becomes inactive and only a Justification as to why the occurrence needs to be Canceled is required. Values entered do not affect any other occurrence or series of occurrences (**Figure 6.14**).
  - i. **Save:** Captures the request and eliminates the occurrence from the Schedulers' return indefinitely.
  - ii. **Cancel:** Refreshes the page and returns to the Scheduler.

**Note:** Canceling an occurrence is an action that cannot be undone. Not even PDREP can reinstate an occurrence that has been canceled.



**Reschedule/Cancel Surveillance Plan Occurrence**

(M) Action: ☐ Reschedule ☒ Cancel

(M) Justification:

(CM) Reschedule Dates:

Start Date: 09/22/2023 Due Date: 09/25/2023

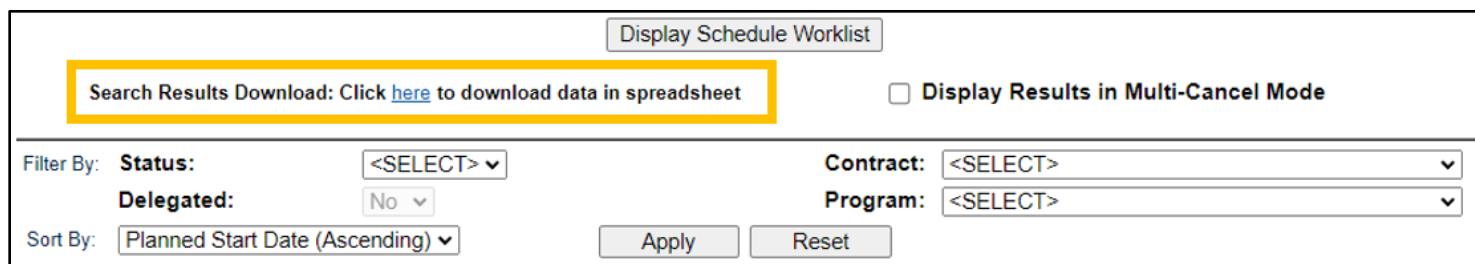
Save Cancel

Figure 6.14

## 6.6 Additional Features

### 6.6.1 Download

**Download:** Downloads return the schedule to a spreadsheet. If the return from the query/filter is greater than 500 rows, the user will be able to download the entirety of the return to a spreadsheet. Use the [here](#) hyperlink (**Figure 6.15**).



Display Schedule Worklist

Search Results Download: Click [here](#) to download data in spreadsheet

☐ Display Results in Multi-Cancel Mode

Filter By: Status: <SELECT> Contract: <SELECT>

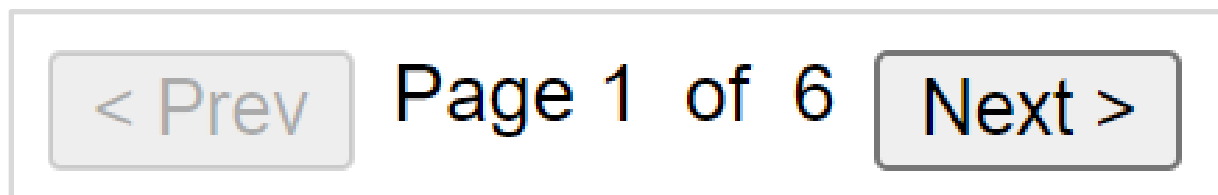
Delegated: No Program: <SELECT>

Sort By: Planned Start Date (Ascending) Apply Reset

Figure 6.15

### 6.6.2 Page Counter

**Page Counter:** Enables the ability to toggle between pages when more than one page of data is returned from the query/filter as shown in **Figure 5.16**. The “Next” button produces the succeeding page where as the “Prev” button navigates back to the previous page.



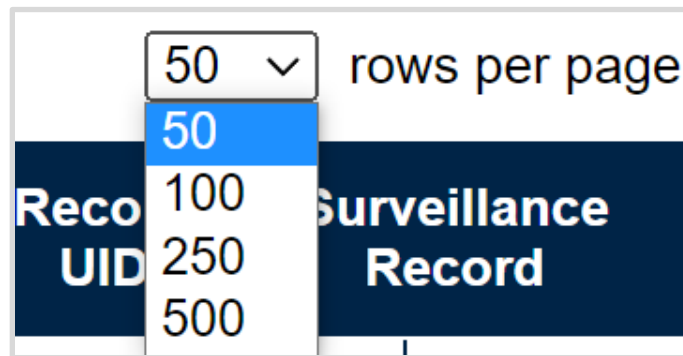
< Prev Page 1 of 6 Next >

Figure 6.16

### 6.6.3 Rows Per Page



**Rows Per Page:** By using the provided dropdown, this feature enables a larger returned schedule as determined by the selected number of rows to be displayed. Returned schedules default to a 50-row return but may be increased to 100, 250 or 500 (**Figure 6.17**).



**Figure 6.17**

### 6.6.4 Multi-Cancel Mode

Supervisors can cancel multiple occurrences at once for an FS on the same DoDAAC by clicking the “Display Results in Multi-Cancel Mode” checkbox on the Scheduler Worklist (**Figure 6.18**). This checkbox may be clicked before or after clicking the “Display Schedule Worklist” button.

A screenshot of a web application titled 'Surveillance Plan Schedules'. The interface includes a navigation bar with tabs: 'Surveillance Plan Worklist', 'Create Surveillance Plan', 'Surveillance Schedules', 'Surveillance Records', and 'Surveillance Plan Ad Hoc Reports'. Below the navigation bar, there are links for 'Landing Page' and 'Instructions'. The main form contains several input fields: '(M) Primary CAGE:' with a text box and a 'Lookup' button; '(M) User ID:' with a text box; '(M) CMT DoDAAC:' with a text box; '(M) Team Code:' with a text box; '(M) KCR UID:' with a text box; and '(M) Functional Area:' with a dropdown menu showing '<SELECT>'. There is also a date range selector for '(M) Planned Start Date:' with 'From' and 'To' fields, currently set to '02/06/2024' and '03/07/2024' respectively, with a note '(4 year maximum search allowed)'. At the bottom, there is a 'Display Schedule Worklist' button and a checkbox labeled 'Display Results in Multi-Cancel Mode' which is highlighted with a yellow border. A link for 'Search Results Download' is also present.

**Figure 6.18**

Once the checkbox is clicked and the user runs a schedule, the returned schedule will have an added column labeled “Select for Cancel” as well as a “Justification” section (**Figure 6.19**). Current functionality allows Supervisors to cancel multiple occurrences, not reschedule multiple occurrences.



Cancel Surveillance Plan Occurrence(s)													
<p>(M) Justification:</p> <div style="border: 1px solid black; height: 30px; width: 100%;"></div>													
<div>Cancel All Selected</div>													
Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Select for Cancel
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/06/2024	02/07/2024	-1	User1	<input type="checkbox"/>
Draft	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/06/2024	02/07/2024	-1	User1	<input type="checkbox"/>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/07/2024	02/08/2024	-2	User1	<input type="checkbox"/>
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/07/2024	02/08/2024	-2	User1	<input type="checkbox"/>

Figure 6.19

If a supervisor selects multiple occurrences to cancel and does not provide a Justification, an error message will appear. **Figure 6.20** shows the error message after a supervisor attempts to cancel multiple occurrences without providing a Justification.

Cancel Surveillance Plan Occurrence(s)													
<p>• Justification is a mandatory field and must be provided before saving the Schedule changes.</p>													
<p>(M) Justification:</p> <div style="border: 1px solid black; height: 30px; width: 100%;"></div>													
<div>Cancel All Selected</div>													
Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Select for Cancel
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/06/2024	02/07/2024	-1	User1	<input checked="" type="checkbox"/>
Draft	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/06/2024	02/07/2024	-1	User1	<input checked="" type="checkbox"/>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/07/2024	02/08/2024	-2	User1	<input checked="" type="checkbox"/>
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/07/2024	02/08/2024	-2	User1	<input checked="" type="checkbox"/>

Figure 6.20

To cancel an occurrence, a Supervisor must click the checkbox of the associated row item(s), add a Justification, then click the “Cancel All Selected” button. After this button is clicked, the page will refresh, and a pop-up will ask the user if they wish to continue (**Figure 6.21**). The user can either click the “OK” or “Cancel” button.

- **OK:** This will proceed with the cancellation of the selected occurrence(s).
- **Cancel:** This will cancel the mass-cancel action and bring the user to the worklist screen.

Filter By: **Status:** <SELECT  
**Delegated:** No  
Sort By: Planned Start Date (Ascending)

alpha.pdrep.csd.disa.mil says  
You are about to cancel one or more Schedule Occurrences.  
Do you wish to continue?  
OK Cancel

< Prev Page 1 of 1 Next >

50 rows per page

### Cancel Surveillance Plan Occurrence(s)

**(M) Justification:**  
JUSTIFICATION REASONING

Cancel All Selected

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Select for Cancel
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/06/2024	02/07/2024	-1	User1	<input checked="" type="checkbox"/>
Draft	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/06/2024	02/07/2024	-1	User1	<input checked="" type="checkbox"/>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/07/2024	02/08/2024	-2	User1	<input checked="" type="checkbox"/>
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/07/2024	02/08/2024	-2	User1	<input checked="" type="checkbox"/>

**Figure 6.21**

Once the supervisor clicks the “OK” button in the pop-up, the occurrences will be immediately removed from the schedule. The screen will refresh to the worklist. The canceled occurrences will not populate in the schedule. **Figure 6.22** shows the Scheduler worklist results before and after the cancellations.

Cancel Surveillance Plan Occurrence(s)

**(M) Justification:**

Cancel All Selected

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Select for Cancel
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/06/2024	02/07/2024	-1	User1	<input checked="" type="checkbox"/>
Draft	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/06/2024	02/07/2024	-1	User1	<input checked="" type="checkbox"/>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/07/2024	02/08/2024	-2	User1	<input checked="" type="checkbox"/>
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/07/2024	02/08/2024	-2	User1	<input checked="" type="checkbox"/>

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Select for Cancel
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/08/2024	02/09/2024	-3	User1	<input type="checkbox"/>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/08/2024	02/09/2024	-3	User1	<input type="checkbox"/>
---	PDREP	0021 1041	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	SPE	1	1	02/09/2024	02/16/2024	-10	User1	<input type="checkbox"/>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/09/2024	02/12/2024	-6	User1	<input type="checkbox"/>

Before cancellation

After cancellation

**Figure 6.22**

To return to the default worklist (non-multi-cancel mode), uncheck the “Display Results in Multi-Cancel Mode” checkbox. The page will automatically refresh to the default worklist after unchecking the box (**Figure 6.23**).

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Select for Cancel
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/08/2024	02/09/2024	-3	User1	<input type="checkbox"/>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/08/2024	02/09/2024	-3	User1	<input type="checkbox"/>
---	PDREP	0021 1041	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	SPE	1	1	02/09/2024	02/16/2024	-10	User1	<input type="checkbox"/>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/09/2024	02/12/2024	-6	User1	<input type="checkbox"/>

Before unchecking the mass-cancel checkbox

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/08/2024	02/09/2024	-3	User1	<div>Resched/Can</div> <div>--</div> <div>New Rcd</div> <div>View Rcd</div>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/08/2024	02/09/2024	-3	User1	<div>Resched/Can</div> <div>--</div> <div>New Rcd</div> <div>View Rcd</div>
---	PDREP	0021 1041	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	SPE	1	1	02/09/2024	02/16/2024	-10	User1	<div>Resched/Can</div> <div>--</div> <div>New Rcd</div> <div>View Rcd</div>
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/09/2024	02/12/2024	-6	User1	<div>Resched/Can</div> <div>--</div> <div>New Rcd</div> <div>View Rcd</div>

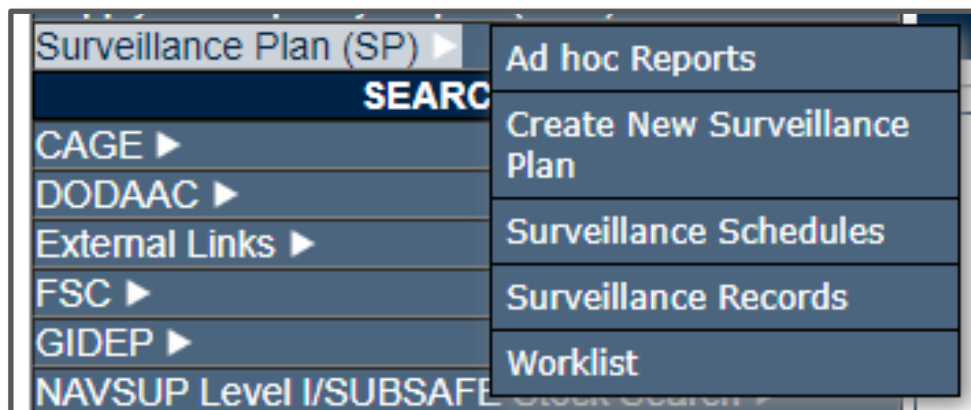
After unchecking the mass-cancel checkbox

Figure 6.23

## 7 SEARCHING THE SP DATABASE – SP AD HOC

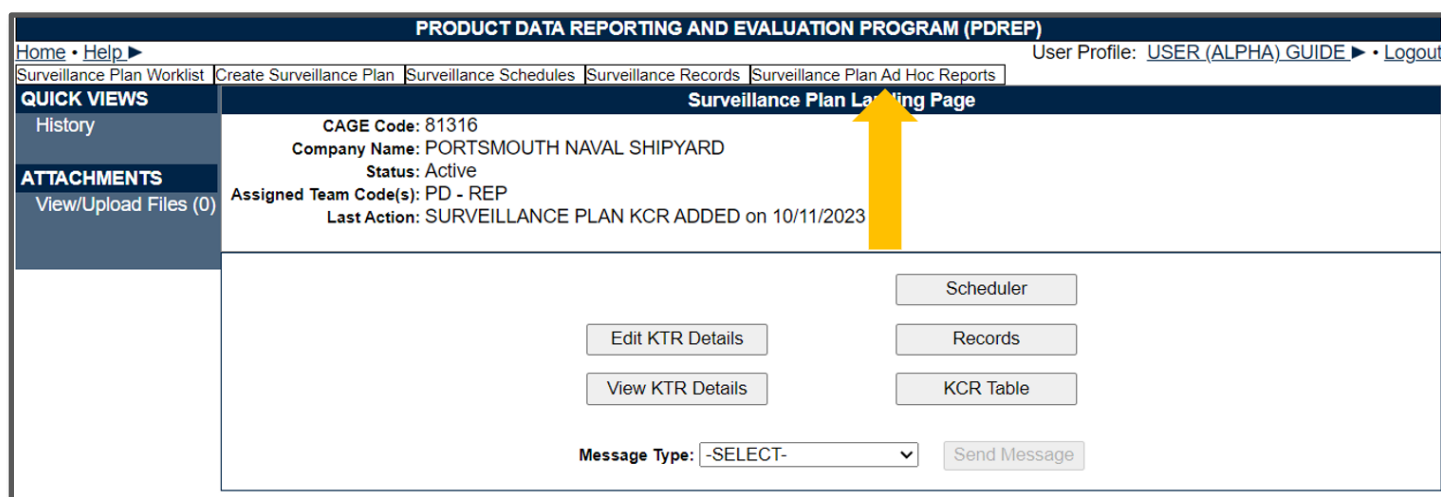
### 7.1 Accessing SP Ad Hoc

From the PDREP-AIS Home page, hover your mouse pointer over the Surveillance Plan title under Applications located on the left portion of the screen and a list of “fly-out” hyperlinks for that application will appear (**Figure 7.1**).



**Figure 7.1**

Selecting the “Ad Hoc Reports” link will navigate browser to that tab within the application. The tab is also available at the top of the page within the modules (**Figure 7.2**).



**Figure 7.2**

**Figure 7.3** illustrates the default display of the SP Ad Hoc Report interface. Instructions on the screen provide additional direction for using the interface for query development.

**Surveillance Plan Ad hoc Report**

**Instructions**  
 To use a previously saved Ad hoc report:  
 1. Select an ad hoc from **My Ad hocs**  
 2. Click **Open My Ad hoc** button  
 3. To share or delete a previously saved ad hoc, select **Manage My Ad hocs** button

Please follow these steps to create new ad hoc report:  
 1. Select a Data Record and click **Get Data Element**  
 2. Select one or more Data Elements  
 3. Click **Add Columns** and/or **Delete Columns** to set the Selected Data Elements List  
 4. Select Data Element and click **Add Where** to set the where condition(s)  
 5. Enter the Expression and Value in the Where clause  
 6. To add more then one where condition select a Logical Expression  
 7. Click on **RUN QUERY**

**Select Data Record:** Surveillance Plan (ALL) ▼ Get Data Elements

**Row Count:** ☐

**maximum rowcount:** 20000 (Maximum size : 20,000)

**Select Columns:**

\*KCR UID

\*Primary Location

\*RECORD UID

CMT DoDAAC

Date Last Updated

History Correspondence

History Date

History Message

History Recipient's Name and Email

History Recipients DoDAAC

Add Columns

Delete Columns

**Selected Data Elements**

No columns selected

**Data Element:** ▼ Add Where

**Figure 7.3**

The “Select Data Record” drop-down, seen in **Figure 7.3**, has multiple dataset options to choose from to pull different data elements for reporting:

- i. IDR Data Elements
- ii. IDR Level Product Characteristics
- iii. KCR Risk Trend
- iv. Plan Level Product Characteristics
- v. Record Data Elements
- vi. Scheduler Data Elements
- vii. Surveillance Plan (ALL)

Each of the “Select Data Record” dropdown’s are explained and outlined in the following sections.

## 7.2 Surveillance Plan (ALL) Drop-down

Top-level Surveillance Plan data elements are available under the Surveillance Plan (ALL) drop-down. Some Surveillance Plan data elements are also seen on the Plan Level Product Characteristics and KCR Risk Trend dropdowns. Detailed KCR information is included with the Plan level data elements.

When pulling reports within the Surveillance Plan (ALL) drop-down, you have data elements for the Plan, KCRs, and Records. If data elements for Records are selected, but the \*Record UID is not, you may see the error in **Figure 7.4**.

• Report Error : Error executing report query. Reason : ORA-00904: "FSIPKCR"."RECORD\_SEQ": invalid identifier

My Ad hocs:

Select Data Record:

Row Count: ☐

maximum rowcount:  (Maximum size : 20,000)

Select Columns:

\*KCR UID  
\*RECORD UID  
CMT DoDAAC  
Date Last Updated  
Func Area Date  
History Correspondence  
History Date  
History Message  
History Recipient's Name and Email  
History Recipients DoDAAC

\*Primary Location  
Rec. \*End Item Description  
Rec. \*End Item NSN  
Rec. \*End Item Part No./Unique ID  
Rec. \*End Item Serial No.  
Rec. \*End Item(s)  
Rec. Action Taken  
Rec. Applicable Contracts

Data Element:

Data Element	Data Type	Expression	(M) Value	Logical Expression	Delete	^	v
*Primary Location	CHAR(12)	=	PDREP	- Select -	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>

Figure 7.4

This error populates because the report is asking for Records on a specific Plan without the key record identifying information (\*Record UID and/or \*KCR UID). When pulling record data on the "Surveillance Plan (ALL)" drop-down, include the \*Record UID.

## 7.3 Plan Level Product Characteristics Drop-Down

This drop-down holds the data elements to pull Plan level NSN/End Item and Product Characteristics data. The Product Characteristics are associated with a specific NSN/End Item.

All data elements may be added to the report. If only the NSN/End Item or Product Characteristics are added (**Figure 7.5**), it may appear that rows are repeating or duplicating (**Figure 7.6**).



My Ad hocs:

Select Data Record:

Row Count: ☐

maximum rowcount:  (Maximum size : 20,000)

Select Columns: **Data Elements**

- SP Prod. Chara. Characteristic Classification
- SP Prod. Chara. Description
- SP Prod. Chara. End Item ID
- SP Prod. Chara. ESA Identified-CC
- SP Prod. Chara. Insp. Req.
- SP Product Characteristic

**Selected Data Elements**

- \*Primary Location
- SP End Item COG
- SP End Item Description
- SP End Item FSC
- SP End Item NIIN
- SP End Item NSN
- SP End Item Part Number
- SP End Item Serial Number
- SP End Item SMIC
- SP End Item Status

Data Element:

Data Element	Data Type	Expression	(M) Value	Logical Expression	Delete	^	V
*Primary Location	CHAR(12)	=	PDREP	- Select -	<input type="checkbox"/>	<input type="radio"/>	

Figure 7.5

Row Count: 24

Data Download: Click [here](#) to download data in spreadsheet

Plan Level Product Characteristic - Record										
*Primary Location	SP End Item COG	SP End Item Description	SP End Item FSC	SP End Item NIIN	SP End Item NSN	SP End Item Part Number	SP End Item Serial Number	SP End Item SMIC	SP End Item Status	SP End Item(s)
PDREP		VALVES, NONPOWERED	4820		4820				Active	4820
PDREP		TEST TEST	4820	123456789	4820123456789	123456789			Active	4820123456789
PDREP		TEST TEST	4820	123456789	4820123456789	123456789			Active	4820123456789
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	PARTNUMBER	SERIALNUM	C1	Active	DY4820123456789C1
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	PART 1234	SERIAL 5678	C1	Active	DY4820123456789C1
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	PART 1	SERIAL 1	C1	Active	DY4820123456789C1

Figure 7.6

**Figure 7.6** appears like there are duplicating rows of the NSN/End Item information. However, since there are Product Characteristic associated to *some* of those NSN/End Items, the rows populate to match the number of Product Characteristics.

When the full report is pulled with all available data elements, the same number of rows are returned but no longer appear to be duplicates since the different Product Characteristics are displaying with each parent NSN/End Item (**Section 3.2.7** of this document).



Row Count: 24																
Data Download: Click <a href="#">here</a> to download data in spreadsheet																
Plan Level Product Characteristic - Record																
*Primary Location	SP End Item COG	SP End Item Description	SP End Item FSC	SP End Item NIIN	SP End Item NSN	SP End Item Part Number	SP End Item Serial Number	SP End Item SMIC	SP End Item Status	SP End Item(s)	SP Prod. Chara. Classification	SP Prod. Chara. Description	SP Prod. Chara. End Item ID	SP Prod. Chara. ESA Identified-CC	SP Prod. Chara. Insp. Req.	SP Product Characteristic
PDREP		VALVES, NONPOWERED	4820		4820				Active	4820						
PDREP		TEST TEST	4820	123456789	4820123456789	123456789			Active	4820123456789						
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	12	153	C1	Active	DY4820123456789C1						
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	PART 1234	SERIAL 5678	C1	Active	DY4820123456789C1						
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	PARTNUMBER	SERIALNUM	C1	Active	DY4820123456789C1						
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	PART 1	SERIAL 1	C1	Active	DY4820123456789C1						

Figure 7.7

When rows are repeating, it is typically because there exists a many-to-one relationship between the data elements. This ALWAYS applies to ALL data elements, not just the ones selected for the query being run.

## 7.4 KCR Risk Trend Report Drop-Down

In the SP Ad Hoc under “Select Data Record”, select “KCR Risk Trend” and click “Get Data Elements”. This will open the 12 data elements that are part of this report seen in **Figure 7.8**.

Select Data Record: KCR Risk Trend ▼ Get Data Elements

Row Count: ☐

maximum rowcount:  (Maximum size : 20,000)

Select Columns: Data Elements

1. Primary Location  
2. KCR UID  
3. KCR# & Description  
4. KCR Surveillance Event  
5. Date  
6. Risk - Cost Rating  
7. Risk - Schedule Rating  
8. Risk - Performance Rating  
9. Risk - Likelihood Rating  
10. KCR Risk Rating

Add Columns  
Delete Columns

Selected Data Elements

No columns selected

Data Element: ▼ Add Where

Figure 7.8

The data elements are numbered in a specific order to successfully run the report. Select all columns by either click + drag down or hold shift + click the first and last item in the list), then click Add Columns to add them all at once to the Selected Data Elements in their numbered order (**Figure 7.9**).

101

**Select Columns:**

**Data Elements**

No columns to select

Add Columns

Delete Columns

**Selected Data Elements**

1. Primary Location  
2. KCR UID  
3. KCR# & Description  
4. KCR Surveillance Event  
5. Date  
6. Risk - Cost Rating  
7. Risk - Schedule Rating  
8. Risk - Performance Rating  
9. Risk - Likelihood Rating  
10. KCR Risk Rating

^

v

**Data Element:**

1. Primary Location

Add Where

**Figure 7.9**

Any condition(s) or expression(s) may be used, but at a minimum, a Primary Location is recommended, with a KCR UID next (Figure 7.10).

**Select Data Record:**

KCR Risk Trend

Get Data Elements

**Row Count:**
☐

**maximum rowcount:**

20000

(Maximum size : 20,000)

**Select Columns:**

**Data Elements**

No columns to select

Add Columns

Delete Columns

**Selected Data Elements**

1. Primary Location  
2. KCR UID  
3. KCR# & Description  
4. KCR Surveillance Event  
5. Date  
6. Risk - Cost Rating  
7. Risk - Schedule Rating  
8. Risk - Performance Rating  
9. Risk - Likelihood Rating  
10. KCR Risk Rating

^

v

**Data Element:**

2. KCR UID

Add Where

Data Element	Data Type	Expression	(M) Value	Logical Expression	Delete	^	v
1. Primary Location	CHAR(5)	=	PDREP	AND	<input type="checkbox"/>	<input type="radio"/>	
2. KCR UID	NUMBER	=	137436	- Select -	<input type="checkbox"/>	<input type="radio"/>	

Run Query

Reset

**Figure 7.10**

Run the Query to populate a table representing the Risk Trend (Figure 7.11).

KCR Risk Trend - Record											
1. Primary Location	2. KCR UID	3. KCR# & Description	4. KCR Surveillance Event	5. Date	6. Risk - Cost Rating	7. Risk - Schedule Rating	8. Risk - Performance Rating	9. Risk - Likelihood Rating	10. KCR Risk Rating	11. KCR Risk Likelihood Rationale	12. User ID
PDREP	137436	KCR-QA-A002 - Other Agency Accepted work requirements	Delivery		1			1	1	TEST	User1
PDREP	137436	KCR-QA-A002 - Other Agency Accepted work requirements	Delivery	08/09/2023	1			1	1	TEST	User1
PDREP	137436	KCR-QA-A002 - Other Agency Accepted work requirements	Delivery	08/09/2023	1			1	1	TEST	User1
PDREP	137436	KCR-QA-A002 - Other Agency Accepted work requirements	Delivery	08/10/2023	1			1	1	TEST	User1

Figure 7.11

#### Risk Trend Report Functionality Notes for Figure 7.11

- If the first row has no Date or User ID: older data did not save KCR data the way it does now, so some older KCRs' data will not always show this information.
- There is no current method for ordering changes happened on the same day in the order in which they were done.
- This report pulls **all changes to KCRs** even if the change being made was outside the scope of these 12 data elements (i.e.: Allocated Hours, Frequency, etc.). This may cause some rows may look identical to each other – as in, nothing is changing from time one to time two.

### 7.5 Record Data Elements Drop-Down

Record Level Data Elements are available under the Surveillance Plan (ALL) drop-down and the Record Data Elements drop-down.

The Record information was copied to its own drop-down to provide easier access to Record-specific information for reporting.

### 7.6 Scheduler Data Elements Drop-Down

Scheduler Data Elements are data elements in reference to current scheduled events. Changes made to KCRs and Records will affect the results in real time. These data elements are available to assist in tracking cancellation and rescheduling events.

### 7.7 IDR Data Elements Drop-Down

IDR Level Data Elements are only available under the IDR Data Elements drop-down, which includes the values found in the IDR Level Product Characteristics drop-down. The IDRs are linked to both the Record and KCR.

There are two different types of IDRs based on the Surveillance Category selected on the KCR. When IDR Data Elements are selected that pertain to both DPE and SPE IDRs, there may be blank rows returned in the ad hoc report since not all data elements apply to both IDR types.

For example, an SPE-based IDR has fields for the Inspection System Indicator, Command Media, and Process Compliance and Effectiveness Assessments. These fields do not exist on a

DPE IDR and will not populate values in the return table. Similarly, the IDR Manufacturing Spec. and IDR Material Spec. are only available on DPE IDR Records (**Figure 7.12**).

**Note:** Repeating rows have been removed for ease of reading.

IDR Data Elements - Record													
*IDR UID	*KCR UID	*Primary Location	*RECORD UID	IDR Actual Hours	IDR AQL	IDR Associated KCRs	IDR Batch/Lot/Heat	IDR Command Media	IDR Completed	IDR Completion Date	IDR Date Closed	IDR Def. Req. CA	IDR Evaluation Criteria
PDREP-0224-0001-001	00211039	PDREP	PDREP-0224-0001	50.0				N	Y	02/07/2024	02/07/2024	(CM) DEFICIENCY(IIES) REQUIRING CORRECTIVE ACTION TEST	(M) EVALUATION CRITERIA TEST
PDREP-0224-0004-001	00211040	PDREP	PDREP-0224-0004	10.0	0.4% AQL (Critical)		BATCH/LOT/HEAT TEST		Y	02/07/2024	02/07/2024	(CM) DEFICIENCY(IIES) REQUIRING CORRECTIVE ACTION TEST	(M) EVALUATION CRITERIA TEST
PDREP-0224-0003-001	00211041	PDREP	PDREP-0224-0003						N				
PDREP-0224-0002-001	00211040	PDREP	PDREP-0224-0002						N				

Figure 7.12

7.8 IDR Level Product Characteristics

These data elements were added to an additional drop-down to allow for data pulls on just IDR Level Product Characteristics (like the Plan Level Product Characteristics).

If the NSN/End Item data elements are selected without the Product Characteristics, it will appear the NSN/End Items are duplicating, or that rows are populating to match the number of Product Characteristics associated with each NSN/End Item. An IDR example is listed below.

Build the query only including the IDR \*End Item values (**Figure 7.13**).

Select Columns:

Data Elements

IDR Prod. Chara. Characteristic Classification  
IDR Prod. Chara. Description  
IDR Prod. Chara. ESA Identified-CC  
IDR Prod. Chara. Insp. Req.  
IDR Product Characteristic

Add Columns

Delete Columns

Selected Data Elements

\*IDR UID  
\*KCR UID  
\*Primary Location  
\*RECORD UID  
IDR \*\*End Item  
IDR \*\*End Item Description  
IDR \*\*End Item NSN  
IDR \*\*End Item Part No./Unique ID  
IDR \*\*End Item Serial No.

Data Element:

\*Primary Location

Add Where

Data Element	Data Type	Expression	(M) Value	Logical Expression	Delete	^	V
*Primary Location	CHAR(12)	=	PDREP	- Select -	<input type="checkbox"/>	<input type="radio"/>	

Run Query

Reset

Figure 7.13

Click “Run Query” to populate the results in **Figure 7.14**.

IDR Level Product Characteristics - Record								
*IDR UID	*KCR UID	*Primary Location	*RECORD UID	IDR **End Item	IDR **End Item Description	IDR **End Item NSN	IDR **End Item Part No./Unique ID	IDR **End Item Serial No.
PDREP-0224-0002-001	00211040	PDREP	PDREP-0224-0002	AH14		AH14		
PDREP-0224-0004-001	00211040	PDREP	PDREP-0224-0004	123123123	123		123	123
PDREP-0224-0005-001	00211040	PDREP	PDREP-0224-0005	AH14	PRODUCT SERVICE DESCRIPTION	AH14	UNIQUE IDENTIFIER	SERNUM123
PDREP-0224-0005-001	00211040	PDREP	PDREP-0224-0005	AH14	PRODUCT SERVICE DESCRIPTION	AH14	UNIQUE IDENTIFIER	SERNUM123
PDREP-0224-0005-001	00211040	PDREP	PDREP-0224-0005	AH14	PRODUCT SERVICE DESCRIPTION	AH14	UNIQUE IDENTIFIER	SERNUM123

**Figure 7.14**

There are three IDRs that repeat on multiple rows within **Figure 7.14**. This typically indicates there are multiple Product Characteristics associated with each of those IDRs. **Figure 7.15** shows the results after adding the Product Characteristics to the search query.

IDR Level Product Characteristics - Record													
*IDR UID	*KCR UID	*Primary Location	*RECORD UID	IDR **End Item	IDR **End Item Description	IDR **End Item NSN	IDR **End Item Part No./Unique ID	IDR **End Item Serial No.	IDR Prod. Chara. Characteristic Classification	IDR Prod. Chara. Description	IDR Prod. Chara. ESA Identified-CC	IDR Prod. Chara. Insp. Req.	IDR Product Characteristic
PDREP-0224-0005-001	00211040	PDREP	PDREP-0224-0005	AH14	PRODUCT SERVICE DESCRIPTION	AH14	UNIQUE IDENTIFIER	SERNUM123	MINOR	DESCRIPTION	N/A	Customer Mandatory	Dimension
PDREP-0224-0005-001	00211040	PDREP	PDREP-0224-0005	AH14	PRODUCT SERVICE DESCRIPTION	AH14	UNIQUE IDENTIFIER	SERNUM123	MAJOR	DESCRIPTION OF CHARACTERISTIC	Yes	DCMA Risk Based	Process Output
PDREP-0224-0002-001	00211040	PDREP	PDREP-0224-0002	AH14		AH14			MINOR	DESCRIPTION	N/A	Customer Mandatory	Dimension
PDREP-0224-0005-001	00211040	PDREP	PDREP-0224-0005	AH14	PRODUCT SERVICE DESCRIPTION	AH14	UNIQUE IDENTIFIER	SERNUM123	UNKNOWN	PC DESC	N/A	DCMA Risk Based	Other

**Figure 7.15**

The results are now limited by only the IDRs that have NSN End Items with Product Characteristics associated to those NSN End Items. The repeating rows were due to the unique Product Characteristics for each IDR. The bottom row is a SPE-based IDR, unlike the first two which are DPE-based IDRs. The SPE IDR does not have NSN information but can have multiple Process Elements values. Adding the Process Elements to the query reveals there are two unique Process Elements entries for the SPE IDR.

When rows are duplicating, it is typically because there exists a many-to-one relationship between the data elements. This applies to ALL data elements, not just the ones selected for the query being run.

## 7.9 Additional Ad Hoc Support

Please refer to the Product Data Reporting and Evaluation Program (PDREP) Ad Hoc Search Tool User Guide for assistance using the SP Ad Hoc Tool. **Appendix 1** contains some useful information regarding utilization of the specific SP data set.

The Ad Hoc query generator can be used to generate a variety of reports; results are downloadable to a spreadsheet (Excel) format. Users may select specific data elements from the Plan such as date range or code, to generate query results.

The Product Data Reporting and Evaluation Program (PDREP) Ad Hoc Search Tool User Guide can be located at:

[https://www.pdrep.csd.disa.mil/pdrep\\_files/reference/guides\\_manuals/guides\\_manuals.htm](https://www.pdrep.csd.disa.mil/pdrep_files/reference/guides_manuals/guides_manuals.htm)

(**Figure 7.16**) or can be found by clicking the User Guides selection under the Help menu on the top of any PDREP window (**Figure 7.17**).

**Guides and Manuals**

**PDREP Guides and Manuals**

**General**

- [Attaching a file in PDREP](#) *September 2021*
- [Customer Service Request \(CSR\)](#) *June 2019*
- [Search Tools](#) *May 2022*
- [User Access Request](#) *October 2023*

**PDREP Tools**

- [ADHOC Search](#) *September 2022*
- [Contract Award & Delivery \(CAD\) Data Application](#) *October 2023*
- [Contractor Profile](#) *May 2020*
- [DoD Corrective Action Request \(CAR\)](#) *October 2023*
- [Engineering Referral System \(ERS\)](#) *October 2023*
- [Material Inspection Records \(MIR\)](#) *October 2023*
- [Quality Assurance Letter of Instruction \(QALI\)](#) *May 2023*
- [Receipt Inspection Management System \(RIMS\)](#) *October 2023*
- [SPPI Bulletin \(SB\)](#) *January 2022*
- [Supply Action Module \(SAM\)](#) *October 2023*
- [Supplier Audit and Assessment \(SAA\)](#) *September 2022*
- [Supply Discrepancy Report \(SDR\)](#) *October 2023*
- [Survey, Special Quality, & Test Records Applications](#) *October 2023*

**Other Programs**

- [Exhibit & Shipment Tracking](#) *October 2023*
- [PDREP Prime Contractor](#) *January 2020*
- [Warranty & Source of Repair Tracking](#) *September 2022*

**Product Quality Deficiency Reports (PQDR)**

- **Originator Documents**
  - [Originator Instructions](#) *October 2023*
  - [Local Purchase Instructions](#) *October 2023*
- **Screening Point Documents**
  - [Screening Point Instruction](#) *October 2023*
  - [Army Master Screener Instruction](#) *October 2023*
- **Action Point Documents**
  - [Action Point Instructions](#) *October 2023*
  - [Army Action Officer Instruction](#) *October 2023*
- **Support Point Documents**
  - [1227 Instructions](#) *October 2023*
  - [QAR Investigation](#) *October 2023*
  - [DRPM Investigation](#) *October 2023*

**DCMA Tools**

- [DCMA Corrective Action Request \(CAR\)](#) *October 2023*
- [DCMA Letter of Delegation \(LOD\)](#) *October 2023*
- [DCMA Supplier Risk System \(SRS\)](#) *January 2022*
- [DCMA Surveillance Plan \(SP\) KTR Details](#) *October 2023*
- [DCMA Surveillance Plan \(SP\) Records](#) *October 2023*
- [DCMA Surveillance Plan \(SP\) Scheduler](#) *October 2023*



Figure 7.16

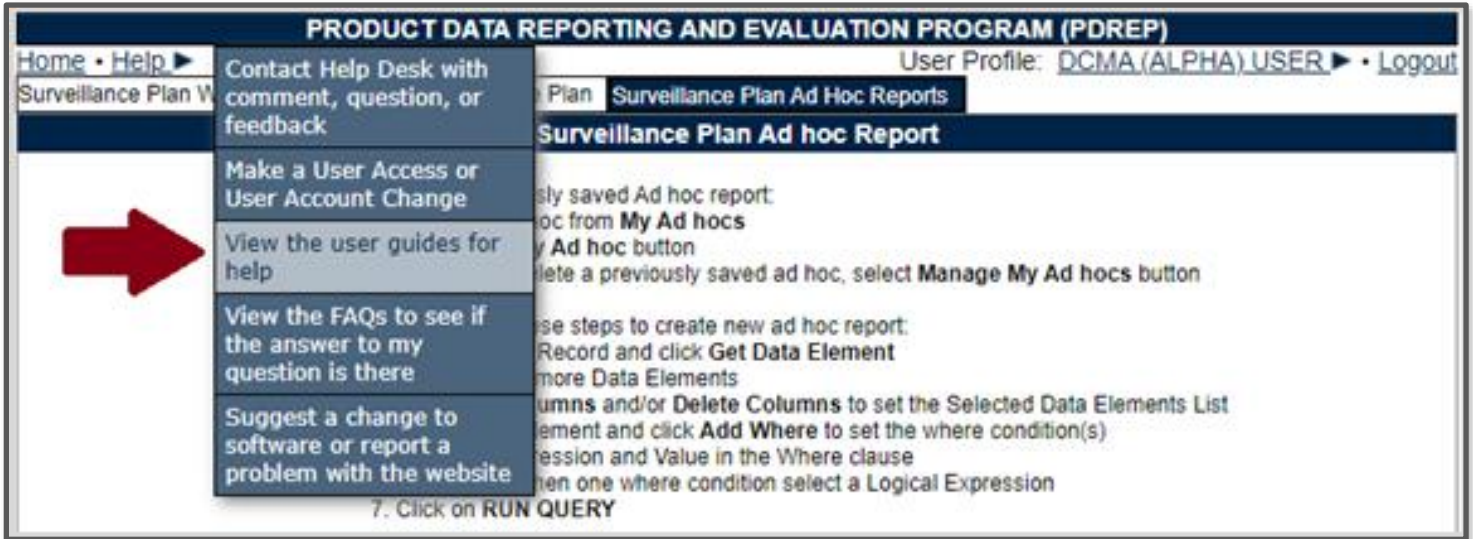


Figure 7.17

## 8 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.

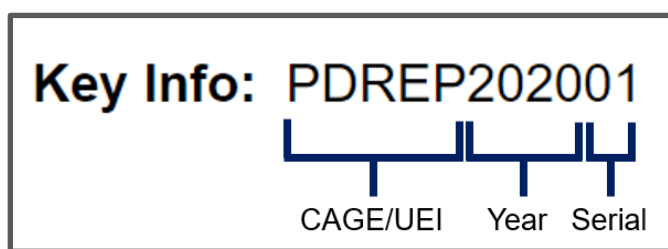
Contact information for the support desk is provided below.

**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**

The screenshot shows the Ad Hoc reporting tool interface. It includes a 'Get Row Count' checkbox, a 'Set maximum rowcount' field set to '20000' (with a note '(Maximum size : 20,000)'), and a 'Select Columns' section. The 'Select Columns' section has a list of 'Data Elements' on the left, including 'ALRE Indicator', 'Active Indicator', 'Agency Accept Work Req Narr', 'Areas Of Concern Narrative', 'Associated CAGE Code(s)', 'Attachment Added Date', 'Attachment File Description', 'Attachment File Name', 'Attachment ID', and 'Audit Date'. There are 'Add Columns' and 'Delete Columns' buttons between the lists. On the right, the 'Selected Data Elements' list contains 'Primary Location' and 'SP Serial Number'. There are also '^' and 'v' buttons next to the 'Selected Data Elements' list.

**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](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.

## Appendix 3 – Data Dictionary

There are several data tables used in the SP module to store data. They have been separated into tables as relevant below. For data not included in the “Main Data Table”, these data elements can exist multiple times on any given SP, using what is known as a “one-to-many” data relationship. For these types of relationships, if pulled in an ad hoc report, each unique value will create a new row in the data.

**For Example:** A single SP record with two contracts associated with it:

Primary Location	Contract Number
CAGE1	CONTRACT 1
CAGE1	CONTRACT 2

The non-unique data (CAGE) is tied to both unique values (Contract Number) appears as two rows in the data. As described in **Appendix 1**, pivot tables and other spreadsheet manipulation methods are the best way to separate out this data once pulled via the Ad Hoc tool.

The Number of Bytes listed in “Data Type” columns is the length of the data field in number of characters or numbers. These fields cannot exceed this number.

**Note:** Data relating to only legacy NSEO SP are not listed in these tables below.

### Surveillance Plan Data Dictionary

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
*IDR UID	Record IDR	IDR UID	Unique identification of the IDR record	CHAR	20
*KCR UID	KCR	KCR UID	Unique Identifier for KCR	CHAR	10
*Primary Location	Plan	Primary CAGE/UEI & Primary Location	Auto-populated based on CAGE code or UEI entered when record is created.	CHAR	12
*RECORD UID	Record	Record UID	Unique identification of the record	CHAR	20
CMT DoDAAC	Plan	DoDAAC	CMO DoDAAC assigned to the cage code per DLA	CHAR	6
Date Last Updated	Plan	Date Surveillance Plan Last Updated	Date the plan was last updated	Date DD-MMM-YY	7
History Correspondence	Background	N/A	Correspondence title	CHAR	2
History Date	Background	N/A	Date the history entry was added	Date DD-MMM-YY	7
History Message	History	Message	Field changed on the record	CHAR	4000
History Recipients Name and Email	Background	POC	Recipient of a message (Reviews / General Messages) if relevant in History	CHAR	40

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
History Recipients DoDAAC	History	To Activity	DoDAAC of the History Notif. Recipient User.	CHAR	6
History Senders Name and Email	History	POC	User ID who made the change or History Action	CHAR	40
History Senders DoDAAC	History	From Activity	DoDAAC of user who made change to record	CHAR	6
IDR **End Item	Record IDR	Background	Same as Plan Level NSN	NUMBER	22
IDR **End Item Description	Record	*End Item Description	Text entered at IDR Product/Service Description.	VARCHAR2	200
IDR **End Item NSN	Record IDR	NSN	End Item NSN Selected for IDR	NUMBER	75
IDR **End Item Part No./Unique ID	Record	*End Item Part No./Unique ID	Text entered at IDR Part Number/Unique Identifier.	VARCHAR2	1,000
IDR **End Item Serial No.	Record	*End Item Serial No.	Text entered at IDR Serial Number.	VARCHAR2	200
IDR Actual Hours	Record IDR	IDR Actual Hours	Actual hours to complete IDR	VARCHAR2	6
IDR AQL	Record IDR	AQL	IDR AQL information	VARCHAR2	4
IDR Assigned Functional Area	Record IDR	Assigned Functional Area	KCR assigned Functional Area	CHAR	25
IDR Associated KCRs	Record IDR	Associated KCRs	KCRs associated with IDR	NUMBER	22
IDR Batch/Lot/Heat	Record IDR	Batch/Lot/Heat	IDR Bat/Lot/Heat information	VARCHAR2	50
IDR Command Media	Record IDR	Command Media Adequate	Y/N indicator for Command Media Adequate	CHAR	1
IDR Completed	Record IDR	Background	Indicator the IDR is completed	CHAR	1
IDR Completion Date	Record IDR	IDR Completion Date	Date indicated within the IDR "(M) Completion Date" Field	Date DD-MMM-YY	7
IDR Contract	Record IDR	Contract	Contract for the IDR	NUMBER	22
IDR Contract Line Item/ PO	Record IDR	IDR Contract Line Item/ Purchase Order	Line Item/Purchase Order for the IDR	VARCHAR2	50
IDR Contractors Command Media	Record IDR	Contractors Command Media	Text field to enter Command Media details.	CHAR	50
IDR Count	Record IDR	Background	Count of IDRs associated with a Record	NUMBER	22
IDR Created User ID	Record IDR	Background	User ID who created the IDF	CHAR	6
IDR Creation Date	Record IDR	Background	Date the IDR was created	Date DD-MMM-YY	7
IDR Date Closed	Record IDR	Background	(Action) Date user successfully saved the record as "Complete" - User Action	Date DD-MMM-YY	7
IDR Def. Req. CA	Record IDR	(CM) Deficiency (ies) Requiring Corrective Action	Narrative field for why the deficiency requires corrective action.	CHAR	1

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
IDR Drawing No.	Record IDR	Drawing Number	Drawing Number of the IDR	CHAR	50
IDR Evaluation Criteria	Record IDR	Evaluation Criteria	Narrative field for IDR evaluation criteria information	CHAR	50
IDR Evaluation Items	Record IDR	Evaluation Item	Narrative field for IDR evaluation item information	CHAR	50
IDR Evaluation Results	Record IDR	Result	Results of IDR Evaluation. S=Satisfactory, U=Unsatisfactory	CHAR	1
IDR Insp. System Ind. Other Stand.	Record IDR	Inspection System Indicator	Inspection System Indicator and other standard information	VARCHAR2	50
IDR Inspection Type	Record IDR	Inspection Type	1 ='In-Process', 2 ='Final'	CHAR	1
IDR Items Inspected	Record IDR	Total Items Inspected	Total number of items inspected	CHAR	1
IDR Items Presented	Record IDR	Total Items Presented	Total number of items presented	CHAR	1
IDR Items Released ARM	Record IDR	Total Items Released off ARM	Total Number of Items Released off ARM	VARCHAR2	4
IDR KCR# and Description	Record IDR	KCR# and Description	KCR# and Description	CHAR	50
IDR LOD CAGE Code	Record IDR	Delegator CAGE	CAGE Code with the associated incoming LOD RCN/DCN of the KCR for the IDR Record.	CHAR	5
IDR LOD DCN	Record IDR	LOD DCN	Document Control Number of the Incoming LOD of the KCR associated to the IDR Record.	VARCHAR	20
IDR LOD RCN	Record IDR	LOD RCN	Record Control Number of the Incoming LOD of the KCR for the IDR Record.	VARCHAR	20
IDR Manufacturing Spec.	Record IDR	Manufacturing Spec.	IDR Manufacturing Specification text box	CHAR	50
IDR Material Spec.	Record IDR	Material Spec	IDR Material Specifications text box	VARCHAR2	50
IDR Notes	Record IDR	Notes	Notes regarding IDR	VARCHAR2	3,000
IDR Proc. Compliance Assessment	Record IDR	Process Compliance Assessment	Narrative field to enter process compliance assessment information	CHAR	50
IDR Proc. Effectiveness Assessment	Record IDR	Process Effectiveness Assessment	Narrative field to enter process effectiveness assessment information	CHAR	50
IDR Proc. Elem. Desc.	Record IDR	Description	Description of Process Element	VARCHAR2	500
IDR Proc. Elem. Notes	Record IDR	Notes	Notes associated to the Process Element	CHAR	255
IDR Proc. Elem. Process Findings	Record IDR	Process Findings	Drop-down under the definition to select Process Findings	NUMBER	22
IDR Proc. Elem. Results	Record IDR	Results	Results of Process elements	CHAR	15

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
IDR Proc. Elem. Review Date	Record IDR	Review Date	Date of process element review	Date DD-MMM-YY	7
IDR Process Element	Record IDR	Process Element	The Process Elements Table within the IDR displayed as one cell	CHAR	15
IDR Prod. Chara. Characteristic Classification	Record IDR	(M) Characteristic Classification	Drop-down to select Characteristic Classification.	CHAR	25
IDR Prod. Chara. Description	Record IDR	(M) Description	Text field to enter Product Characteristic Description.	CHAR	100
IDR Prod. Chara. ESA Identified-CC	Record IDR	(M) ESA Identified-CC	Drop-down to select ESA Identified-CC.	CHAR	5
IDR Prod. Chara. Insp. Req.	Record IDR	(M) Insp. Req.	Drop-down to select Product Characteristic Inspection Requirement.	CHAR	25
IDR Product Characteristic	Record IDR	(M) Product Characteristic	Drop-down to select Product Characteristic type.	CHAR	25
IDR Release Method	Record IDR	Release Method	Drop-down to select release method	VARCHAR2	4
IDR Remote Surv.	Record IDR	Remove Surveillance	Indicator checkbox of Remote Surveillance	CHAR	1
IDR ReOpen Date	Record IDR	Background	Date IDR reopened	Date DD-MMM-YY	7
IDR ReOpen User ID	Record IDR	Background	User ID who reopened the IDR	CHAR	6
IDR Requirement Reference	Record IDR	Requirement Reference	Narrative field to enter IDR requirement reference information	CHAR	50
IDR Status	Record IDR	IDR Status	Status of IDR D=Draft, C=Complete	CHAR	1
IDR Surveillance Category	Record IDR	Inspection Details Report (IDR) for System/Process Evaluation, Progress Evaluation, Deliverable Product Evaluation, Deliverable Service Evaluation	KCR Surveillance Category	CHAR	50
IDR Surveillance Event	Record IDR	Surveillance Event	KCR Surveillance Event	CHAR	50
IDR Surveillance Techniques	Record IDR	Surveillance Technique(s)	Multiple check boxes to identify all applicable surveillance techniques on the IDR	CHAR	1
IDR Virtual Surv.	Record IDR	Virtual Surveillance	Indicator checkbox of Virtual Surveillance	CHAR	1
KCR Applicable Contract(s)	KCR	Applicable Contract(s)	List is comprised of contracts added to the KCR separated by a comma.	CHAR	9999

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
KCR Applicable Program(s)	KCR	Applicable Program(s)	List is comprised of programs added to the KCR separated by a comma.	CHAR	9999
KCR Applicable Sub-Location(s)	KCR	Applicable Surveillance Location(s)	List is comprised of the sub-locations added to the KCR separated by a comma	CHAR	9999
KCR Assigned FS DoDAAC	KCR	Background	The Assigned Functional Specialist's primary DoDAAC retrieved from their user profile	CHAR	6
KCR Assigned FS Email	Background	N/A	List of assigned Functional Specialist email retrieved from the user profile separated by a comma.	CHAR	100
KCR Assigned FS ID	Background	N/A	List of User IDs from the Assigned Functional Specialist on a KCR retrieved from User profile separated by a comma	CHAR	10
KCR Assigned FS Name	KCR	Assigned Functional Specialist(s)	List of Names from the Assigned Functional Specialist on a KCR separated by a comma	CHAR	9999
KCR Assigned FS Region	KCR	Region	List of Region from the Assigned Functional Specialist on a KCR separated by a comma	CHAR	9999
KCR Assigned FS Team	KCR	Team Code	List of Team Codes from Assigned Functional Specialist on a KCR separated by a comma	CHAR	9999
KCR Assigned Functional Area	KCR	Assigned Functional Area	Assigned functional area of the KCR	CHAR	150
KCR Created Date	Background	N/A	Date the KCR was created	Date DD-MMM-YY	7
KCR Creator DoDAAC	Background	N/A	DoDAAC of user who added KCR; Updates to current value on User's profile.	CHAR	6
KCR Creator Region Literal	Background	N/A	Region of user who added KCR; Updates to current value on User's profile.	CHAR	100
KCR Creator Team Code	Background	N/A	Team Code of user who added KCR; Updates to current value on User's profile.	CHAR	100
KCR Creator User ID	Background	N/A	User ID of user who added KCR	CHAR	50
KCR Creator User Name	Background	N/A	User Name of user who added KCR	CHAR	50
KCR End Date	KCR	End Date	KCR planned End Date	Date DD-MMM-YY	7
KCR Incoming from LOD/IDRL	KCR	KCR Incoming from LOD/IDRL	Yes/No Drop-down to indicate if KCR is incoming from LOD/QALI	CHAR	3
KCR Incoming LOD DCN	KCR	LOD DCN	DCN of LOD/QALI record	VARCHAR2	15

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
KCR Incoming LOD RCN	KCR	LOD RCN	RCN of LOD/QALI record	VARCHAR2	15
KCR LOD CAGE Code	KCR	CAGE Code	CAGE Code with the associated incoming LOD RCN/DCN	CHAR	5
KCR LOD DCN	KCR	LOD DCN	Document Control Number of the Incoming LOD associated to the KCR	VARCHAR	20
KCR LOD RCN	KCR	LOD RCN	Record Control Number of the Incoming LOD associated to the KCR	VARCHAR	20
KCR Other Requirements	KCR	Other Agency Assigned Work Requirements	Text field available to describe other agency assigned work requirements- notably for KCRs ending in "A002"	CHAR	1000
KCR Risk - Allocated Hours	KCR	Allocated Hours	The time planned (in hours) to complete one event. This includes travel, preparation, and documentation.	CHAR	6
KCR Risk - Baseline	KCR	Rick Rating, Baseline	Initial Risk Rating of the KCR	Number	4
KCR Risk - Consequence	KCR	Risk Consequence	Auto-populated calculation	CHAR	1
KCR Risk - Cost Rating	KCR	Risk Consequence – Cost	Numeric 1-5 Selection for Lowest to Highest Risk for Cost	CHAR	1
KCR Risk - Cost Rationale	KCR	Rationale for Risk Consequence – Cost	Required when a numerical value is added to the Risk Consequence requiring a narrative in the text field to discuss reasons for selecting a particular option for Cost Risk.	CHAR	1000
KCR Risk - Likelihood Rating	KCR	Risk Likelihood	Numeric 1-5 Selection for Lowest to Highest Risk for Risk Likelihood	CHAR	1
KCR Risk - Likelihood Rationale	KCR	Rationale for Risk Likelihood	Narrative text field to discuss reasons for selecting a particular option for Risk Likelihood. Required even if Surveillance Warranted is set to "No".	CHAR	1000
KCR Risk - Performance Rating	KCR	Risk Consequence – Performance	Numeric 1-5 Selection for Lowest to Highest Risk for Performance	CHAR	1
KCR Risk - Performance Rationale	KCR	Rationale for Risk Consequence – Performance	Required when a numerical value is added to the Risk Consequence requiring a narrative in the text field to discuss reasons for selecting a particular option for Performance Risk.	CHAR	1000
KCR Risk - Schedule Rating	KCR	Risk Consequence – Schedule	Numeric 1-5 Selection for Lowest to Highest Risk for Schedule	CHAR	1

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
KCR Risk - Schedule Rationale	KCR	Rationale for Risk Consequence – Schedule	Required when a numerical value is added to the Risk Consequence requiring a narrative in the text field to discuss reasons for selecting a particular option for Schedule Risk.	CHAR	1000
KCR Start Date	KCR	Start Date	The date the surveillance evaluation is planned to begin.	Date DD-MMM-YY	7
KCR Surveillance Activity	KCR	Surveillance Activity	Based on the Surveillance Event selected, choose Surveillance Activity from the drop-down. The Surveillance Sub-Activity data field may then populate if relevant to the selection.	CHAR	100
KCR Surveillance Category	KCR	Surveillance Category	Type of Surveillance	CHAR	35
KCR Surveillance Complete	KCR	Surveillance Complete	Drop-down to indicate if the surveillance is complete.	CHAR	1
KCR Surveillance Event	KCR	Surveillance Event	Based on the KCR number & Description selected, choose the Surveillance Event from the drop-down. The Surveillance Activity data field may then populate if relevant to the selection.	CHAR	100
KCR Surveillance Execution	KCR	Surveillance Execution Info	Text Field that allows surveillance execution information to be entered	CHAR	1000
KCR Surveillance Frequency	KCR	Frequency of Surveillance	The frequency of the planned Surveillance.	CHAR	35
KCR Surveillance Intensity	KCR	Intensity of Surveillance	Intensity selected that determine the appropriate level of oversight of a contractor to meet contractual requirements.	CHAR	45
KCR Surveillance Location	KCR	Surveillance Location	Location of surveillance - selected via drop-down	CHAR	45
KCR Surveillance SubActivity	KCR	Surveillance Sub-Activity	Based on the Surveillance Activity selected, choose the Surveillance Sub-Activity from the drop-down.	CHAR	3
KCR Surveillance Warranted	KCR	Surveillance Warranted*	Indicates if surveillance is to be performed on the selected KCR Requirements. Default value is "Yes".	CHAR	1
KCR Surveillance War Resource	KCR	Resources	Radio button to indicate Surveillance Warranted is due to Resources	CHAR	1



Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
KCR Surveillance War Risk	KCR	Risk	Radio button to indicate Surveillance Warranted is due to Risk	CHAR	1
KCR Unallocated Hours	KCR	Unallocated Hours	Field to enter Unallocated hours, including drop-down for 15 minute intervals.	NUMBER	12
KCR Will Be Delegated Indicator	KCR	KCR will be delegated	Yes, No or RGQA selection indicating if the KCR Requirements will be delegated via a LOD.	CHAR	1
KCR# & Description	KCR	KCR# & Description	Based on the Assigned Functional Area selected, choose the KCR# & Description from the drop-down. The Surveillance Events data field will then populate based off this selection.	CHAR	150
KTR Address	Background	N/A	Address of primary location	CHAR	36
KTR Business Model	Plan	Business Model	Business model of the prime location of the SP	CHAR	4
KTR City	Background	N/A	City of primary location	CHAR	36
KTR Name	Background	N/A	Name of primary location	CHAR	36
KTR POC Email	Plan	POC E-mail	User-editable field to denote the email address of the primary POC associated with the surveillance location.	CHAR	100
KTR POC Functional Area	Plan	Functional Area	Drop-down to select the functional area associated with the KTR POC.	CHAR	30
KTR POC Name	Plan	POC Name	User-editable field to denote the primary POC associated with the surveillance location.	CHAR	30
KTR POC Phone Number	Plan	POC Phone	User-editable field to denote the phone number of the primary POC associated with the surveillance location.	CHAR	20
KTR POC Title	Plan	POC Title	User-editable field to denote the job title of the primary POC associated with the surveillance location.	CHAR	30
KTR State	Background	N/A	State associated with the Primary Location CAGE	CHAR	2
Next Evaluation Due Date	Scheduler	Background	Calculated date of next surveillance based on start date and frequency	Date DD-MMM-YY	7
Next Evaluation Due Date Series	Background	N/A	Calculated next 20 date of surveillance based on start date and frequency	Date DD-MMM-YY	7
Rec. *End Item Description	Record	*End Item Description	Text entered at the record level	VARCHAR2	200
Rec. *End Item NSN	Record	*End Item NSN	End Item NSN Selected for Parent Record	NUMBER	22
Rec. *End Item Part No./Unique ID	Record	*End Item Part No./Unique ID	Text entered at the record level	VARCHAR2	20

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
Rec. *End Item Serial No.	Record	*End Item Serial No.	Text entered at the record level	VARCHAR2	20
Rec. *End Item(s)	Record	Applicable End Items(s)	Same as Plan Level NSN	NUMBER	22
Rec. Action Status	Record	N/A	Displays ReAssigned or ReOpened for the last action taken on the record.	CHAR	1
Rec. Action Taken	Record	Action Taken	Drop-down selection of Increase Surveillance, Decrease Surveillance, No Change	CHAR	1
Rec. Actual Hours	Record	Actual Hours	Record actual hours	VARCHAR2	6
Rec. Alt. Address	Record	Alt. Address	Alternative address on record page.	VARCHAR2	75
Rec. Applicable Contracts	Record	Applicable Contracts	All Applicable Contracts displayed as one cell	NUMBER	22
Rec. Applicable Programs	Record	Applicable Programs	All Applicable Programs displayed as one cell	NUMBER	22
Rec. Assess Risk	Record	Assess Risk	Drop-down to select if risk has had: Increase Risk, Decrease Risk or No Change.	CHAR	5
Rec. Assigned Event	Record	Assigned KCR Event	Display value of KCR Event on Records page.	CHAR	100
Rec. Assigned Functional Area	Record	Assigned Functional Area	KCR Assigned Functional Area	CHAR	50
Rec. Assigned KCR # & Desc.	Record	Assigned KCR # & Desc.	Display value of KCR # & Desc. on Records page.	NUMBER	22
Rec. Assoc. IDRs	Record	Associated IDRs	Table listing all associated KCRs	NUMBER	22
Rec. Assoc. KCR UID	Record	Assoc. UID	Listed under Associated KCR Table	CHAR	1
Rec. Attachment Indicator	Record	Background	Displays a 'Y' IF THERE IS AN ATTACHMENT ON THE RECORD AND A 'N' IF THERE IS NO ATTACHMENT.	CHAR	1
Rec. Closed Date	Record	Closed Date	Date user successfully saved the record as "Complete" - User Action	Date DD-MMM-YY	7
Rec. Completed	Record	Completed	Action - Did record owner marked & saved the record as complete	CHAR	1
Rec. Completion Date	Record	Completion Date	Date indicated within the record "(M) Completion Date Field"	Date (DD-MMM-YY)	7
Rec. Count	Record	Count	Number of records associated to a KCR	NUMBER	22
Rec. Creator	Record	FS User ID	User ID who created the record	VARCHAR2	6
Rec. Creator Date	Record	Background	Date Record was created	Date DD-MMM-YY	7
Rec. Evaluation Criteria	Record	Rec. Evaluation Criteria	From Plan level	VARCHAR2	3,000

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
Rec. Evaluation Item	Record	Rec. Evaluation Item	Evaluation item on record	VARCHAR2	3,000
Rec. Evaluation Results	Record	Rec. Evaluation Results	Results of Evaluation. S=Satisfactory, U=Unsatisfactory	CHAR	1
Rec. KTR POC	Record	KTR POC   KTR Title	Name and Title of KTR POC selected from the drop-down	VARCHAR	50
Rec. LOD CAGE Code	Record	Delegator CAGE	CAGE Code with the associated incoming LOD RCN/DCN of the KCR for the Record.  <b>Note:</b> this data element will only be visible for completed records when pulling from the ad hoc.	CHAR	5
Rec. LOD DCN	Record	LOD DCN	Document Control Number of the Incoming LOD of the KCR associated to the Record.  <b>Note:</b> this data element will only be visible for completed records when pulling from the ad hoc.	VARCHAR	20
Rec. LOD RCN	Record	LOD RCN	Record Control Number of the Incoming LOD of the KCR for the Record.  <b>Note:</b> this data element will only be visible for completed records when pulling from the ad hoc.	VARCHAR	20
Rec. OnD	Record	Background	Distinguishes if this is an on-demand record type or not	CHAR	1
Rec. OnD End Date	Record	End Date	End date within the on-demand record	Date DD-MMM-YY	7
Rec. OnD End Overdue	Record	Status	On demand record that has met or exceeded their end date and requires attention.	Date DD-MMM-YY	7
Rec. OnD Start Date	Record	Start Date	Start date within the on-demand record	Date DD-MMM-YY	7
Rec. OnD Status	Record	Status	Status of On Demand Record. D=Draft, C=Complete	CHAR	1
Rec. Owner - DoDAAC	Record-Background	Assigned FS	DoDAAC of the user who is associated (responsible) for the record.	VARCHAR2	6
Rec. Owner - Email	Record	FS Email	Email of the user who is associated (responsible) for the record.	VARCHAR2	100
Rec. Owner - Name	Record	Assigned FS	Full Name of the user who is associated (responsible) for the record. The Assigned FS of the record	VARCHAR2	50

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
Rec. Owner - Team Code	Record-Background	Background	Team Code of the user who is associated (responsible) for the record.	VARCHAR2	6
Rec. Owner - User ID	Record	FS User ID	User ID who is associated (responsible) for the record. The Assigned FS of the record	CHAR	6
Rec. Prime KTR CAGE Code	Record	Prime KTR CAGE Code	Prime KTR CAGE Code	VARCHAR2	12
Rec. ReAssign Date	Record	Background	Date a record was reassigned	Date DD-MMM-YY	7
Rec. ReAssign User ID	Record	Background	User ID who reassigned a record - From	CHAR	6
Rec. Remote Surv.	Record	Remote Surv.	Remote surveillance indicator	CHAR	1
Rec. ReOpen Date	Record	Background	Date a record was reopened	Date DD-MMM-YY	7
Rec. ReOpen User ID	Record	Background	User ID who reopened a record - From	CHAR	6
Rec. Requirement Reference	Record	Requirement Reference	Narrative field for requirement reference(s)	VARCHAR2	3,000
Rec. Results	Record	Evaluation Results	Results of record	VARCHAR2	100
Rec. Status	Record	Status	Status of the record. D=Draft, C=Complete, A=Reassigned, O=Reopened	CHAR	1
Rec. Surveillance Category	Record	System/Process Evaluation, Progress Evaluation, Deliverable Product Evaluation, Deliverable Service Evaluation	KCR Surveillance Category	CHAR	50
Rec. Surveillance Tech.	Record	Surveillance Technique(s)	Techniques used for surveillance listed in comma separated field.	CHAR	1
Rec. Virtual Surv.	Record	Virtual Surv.	Virtual surveillance indicator	CHAR	1
Rejected Disapproval Comments	Plan	Disapproval comments	Rejected review disapproval comments narrative	VARCHAR2	200
Schedule Status	Scheduler	Status	Status of KCR occurrence within the Scheduler: Cancelled, Complete, Draft, Not Started	CHAR	15
SO Cancel Date	Scheduler	Background	(Action) Date Occurrence was Canceled	Date DD-MMM-YY	7
SO Days Active	Scheduler	Background	Number of active days of a scheduled occurrence	CHAR	1
SO DoDAAC	Scheduler	Background	DoDAAC of Assigned FS	CHAR	6
SO Due Date - Current	Scheduler	Background	Occurrence Current Planned Start Date	Date DD-MMM-YY	7

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
SO Due Date - Initial	Scheduler	Background	Occurrence Initial <b>FIRST</b> Due Date	Date DD-MMM-YY	7
SO Functional Area	Scheduler	Background	KCR Assigned Functional Area	CHAR	6
SO Name	Scheduler	Background	KCR Assigned FS Name	CHAR	50
SO No. Time ReSched	Scheduler	Background	Number of times occurrence has been rescheduled	NUMBER	3
SO Overdue	Scheduler	Background	Ad hoc element to identify if a record is Overdue. Display "Overdue" if true, Null if false.	VARCHAR2	10
SO Rational	Scheduler	Background	Reschedule / Cancel comments	VARCHAR2	1,000
SO Region	Scheduler	Background	KCR Assigned FS Region	CHAR	25
SO Resch. Date	Scheduler	Background	Date the schedule occurrence was rescheduled.	Date DD-MMM-YY	7
SO Resch. User	Scheduler	Background	User who reschedules an occurrence.	CHAR	12
SO Resch. User DoDAAC	Scheduler	Background	DoDAAC of the User who reschedules an occurrence	VARCHAR	6
SO Resch. User Team Code	Scheduler	Background	Team Code of the User who reschedules an occurrence	VARCHAR	5
SO Start Date - Current	Scheduler	Background	Occurrence Current Planned Start Date	Date DD-MMM-YY	7
SO Start Date - Initial	Scheduler	Background	<b>FIRST</b> Start Date	Date DD-MMM-YY	7
SO Status	Scheduler	Status	Status of the occurrence: Cancelled or Rescheduled	CHAR	1
SO Surveillance ID	Scheduler	Background	Generic unique identifier for each schedule occurrence line item.	CHAR	4
SO Team Code	Scheduler	Background	KCR Assigned FS Team	CHAR	10
SP Activated Date	Plan	Date SP Activated	Date plan was activated	Date DD-MMM-YY	7
SP Active Indicator	Plan	Background	Indicator of the status of the plan- D=draft, Y= Active, N=Archive	CHAR	1
SP Attachment Added Date	Attachments	Added Date	Date attachment was added.	Date DD-MMM-YY	7
SP Attachment Comments	Attachments	Comments	Comments about the attachment	VARCHAR2	200
SP Attachment CUI Category	Attachments	CUI Marking	CUI Markings applied to the attachment	CHAR	1
SP Attachment File Description	Attachments	Description	Attachment description	CHAR	500
SP Attachment File Name	Attachments	File Name	Attachment file name	CHAR	100
SP Attachment File Size	Attachments	File Size	Attachment file size	CHAR	25
SP Attachment ID	Attachments	Background	Auto-populated unique attached ID	CHAR	20
SP Attachment Limited Distribution Control (LDC)	Attachments	Limited Distribution Control (LDC)	Attachment limited distribution controls	CHAR	1
SP Attachment User ID	Attachments	Uploaded By	User ID who uploaded the attachment	CHAR	6

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
SP Contract Number	Plan	Contract Number	Contract Number associated with the plan	CHAR	50
SP Contract Status	Plan	Status	Status of an Applicable Contract within the KTR Details page. May show as "Active" or "Archived".	CHAR	10
SP Contract Value (USD)	Plan	Contract Value (USD)	Dollar value of the contract	CHAR	15
SP Created Year	Background	N/A	Year plan was created	CHAR	4
SP Creation Date	Background	Background	Added Date	Date DD-MMM-YY	7
SP Creator DoDAAC	Background	N/A	DoDAAC of User who created/added plan at time of creation	CHAR	6
SP Creator FS Name	Background	Background	User ID of the user who added to Surveillance Plan	CHAR	12
SP Creator User ID	Background	Background	User ID who created the plan	CHAR	1
SP End Item COG	Plan	COG	Two-position alphanumeric code associated with the Navy Item Manager for the associated NSN.	CHAR	2
SP End Item Description	Plan	Product/Service Description	Product/Service Description	CHAR	200
SP End Item FSC	Plan	FSC	The Federal Supply Class codes are four numeric digits identifying the general group of the material.	CHAR	4
SP End Item NIIN	Plan	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.	CHAR	9
SP End Item NSN	Background	National Stock Number	Ad hoc query field that allows the NSN to be displayed with one selection	NUMBER	22
SP End Item Part Number	Plan	Part Number	Part number of the material	CHAR	25
SP End Item Serial Number	Plan	Serial Number	Serial number of the material	CHAR	20
SP End Item SMIC	Plan	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.	CHAR	2
SP End Item(s)	Plan	Background	Combination of NSN items COG, FSC, NIIN, SMIC.	NUMBER	22

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
SP End Item Status	Plan	Status	Status of a specific end item located on the KTR Details page. May show "Active" or "Archived"	CHAR	10
SP Prod. Chara. Characteristic Classification	Plan	(M) Characteristic Classification	Drop-down to select Characteristic Classification.	CHAR	25
SP Prod. Chara. Description	Plan	(M) Description	Text field to enter Product Characteristic Description.	CHAR	100
SP Prod. Chara. ESA Identified-CC	Plan	(M) ESA Identified-CC	Drop-down to select ESA Identified-CC.	CHAR	5
SP Prod. Chara. Insp. Req.	Plan	(M) Insp. Req.	Drop-down to select Product Characteristic Inspection Requirement.	CHAR	25
SP Product Characteristic	Plan	(M) Product Characteristic	Drop-down to select Product Characteristic type.	CHAR	25
SP Program Code	Plan	(Not Labelled; part of the data)	DoD Program that DCMA is providing surveillance associated with - DCMA short name	CHAR	5
SP Program Status	Plan	Status	Status of an Applicable Program located on the KTR Details page. May be "Active" or "Archived".	CHAR	10
SP Program Type	Plan	List	PMBI / DAI / NSEO Selection	CHAR	5
SP Program(s)	Plan	Program Name	DoD Program that DCMA is providing surveillance associated with - Full Name	CHAR	500
SP Status	Plan	Status	Status of the Surveillance Plan.	VARCHAR2	8
Sub-KTR Business Model	Plan	Sub-Location Business Model	Sub-Location Business Model	CHAR	4
Sub-KTR CAGE/UEI	Plan	Sub-Location	Sub-location CAGE Code or UEI	CHAR	12
Sub-KTR POC Email	Plan	Sub-Location Email	Email of sub-location POC	CHAR	100
Sub-KTR POC Name	Plan	Sub-Location POC	Name of sub-location POC	CHAR	25
Sub-KTR POC Phone	Plan	Sub-Location Phone Number	Phone Number for sub-location POC	CHAR	20
Sub-KTR Type	Plan	Background	Drop-down to select if sub-location has CAGE or UEI.	CHAR	4
Submitted for Review to	Plan	Background	User ID of the person receiving the review request	VARCHAR2	12
Supervisor Rejected Date	Background	N/A	Date plan was rejected	Date DD-MMM-YY	7
Supervisor Reviewed Date	Background	N/A	Date plan was reviewed	Date DD-MMM-YY	7
Supervisor Submit For Review Date	Plan	N/A	Date submitted for Review (Generic)	Date DD-MMM-YY	7
Updated User ID	Background	N/A	User ID of last user to update plan	CHAR	12

