Transcript: How to Create and Submit a QALI Training

Slide 1

Welcome to the Product Data Reporting and Evaluation Program - Automated Information System – PDREP-AIS, training video for Quality Assurance Letters of Instruction, or QALI.

This training video explains how to create and submit a QALI. This training does not replace or amend any Department of Defense (DOD) instructions, regulations, and/or policies. Its purpose is to assist users with the PDREP-AIS QALI module.

Begin demonstration video.

On screen: PDREP website home page

If user has an active account log into PDREP-AIS.

On screen: PDREP-AIS application consent page

If user does not have an active account please refer to the User Access Training on PDREP website under Online Training.

On screen: PDREP-AIS application home page

Once signed in, the PDREP home page will display similar to what you see here.

Note: The options below Applications is dependent on your level of access and may differ from what you see in your PDREP-AIS account.

On the left hand menu, locate the QALI/Letter of Delegation (LOD) application. Hover over the title to produce the fly out menu, then select Create New QALI/LOD.

On screen: QALI/LOD New page

On the QALI/LOD- NEW page, the QALI radio button will be auto-selected.

Enter the 6-digit Delegator Department of Defense Activity Address Code or DoDAAC.

The year and serial number are auto-populated as well as a “Q” suffix identifying the record as a QALI.

Click Create QALI/LOD to bring up the QALI-New/Edit page.

On screen: QALI-New/Edit page

The QALI New/Edit page includes instructions at the top.

Note that throughout the page a (M) denotes a Mandatory field.

The Control Numbers includes RCN, or Report Control Number. This serves as the identification number unique to each record and the created year. A Document Control Number or DCN is added after Delegatee information is entered.

The Internal LOD Status: The Status on all new records is DRAFT and is updated throughout the workflow. This section also includes the Acknowledge Due Date, Acknowledge Date, Accept/Reject Date, Update LOD date and Annual Review Confirmation Checkbox.

The Acknowledge Due Date is a set number of days from the date created. To edit the date, you can click the icon next to the field, which will populate a calendar where you can select a new date, or highlight the field and manually enter a date.

The next section is the Delegator information. This is auto-populated based on the submitter's profile.

Please Note: If any Delegator information is incorrect, users must resubmit an Access Change Request to PDREP.

Delegator name is a mandatory field so click the drop down and select a delegator.

To enter a Delegatee, first enter the Delegatee's six digit DoDAAC. Click or tab out of the box and the page will refresh. On the refreshed page, a drop down will appear that will have the options for Delegatees within that DoDAAC. Note, only users with active PDREP accounts will display on the drop down menu. Select a Delegatee, the page will refresh again and populate their user's information.

The next section includes the Supplier Information. You can indicate a Prime or Sub Contractor via the radio buttons. The supplier CAGE is a unique identification code for the contractor or supplier responsible for work on the contract. Entering a valid CAGE Code and tabbing or clicking outside of the field, will auto-populate the supplier information. If a supplier does not have a CAGE, information can be entered manually.

Next is to add the contract information. Click add Contract button to go to the Add Contract Information page.

On screen: Add Contract Information page

First, select the appropriate contract number type whether DoD (Department of Defense), Federal or International via the radio buttons at the top of the page.

Enter the contract number.

Note: Contract Number, Final Delivery Date, Type of Contract, Face Value of Prime Contract, and Contract End Item or Service Description are Mandatory fields.

Order Number, Line Item Number, Proposal Number, Contract Start Date, Subcontractor/Purchase Order Number, PO Delivery Date and Contracting Officer Name may also be entered.

Once all information is entered, click the Add Contract Information button.

On screen: QALI-New/Edit page

This will populate the contract in a table on the New/Edit Page. Note: if you need to delete a contract, simply click the Delete button. A warning message will pop up to make sure you want to delete that contract. Click OK to delete and cancel to cancel the action and keep the contract on the record.

On screen: Add Contract Information page

If you need to edit a contract, click the edit button and it will reactivate the fields for that contract. Make the necessary changes, and click save item.

On screen: QALI-New/Edit page

Below the contract, you can add NSN information including the COG, FSC, NIIN or SMIC, if available. Click add NSN and like the contract number, a table will form below the fields displaying the NSNs.

To remove a NSN, highlight and click Remove NSN.

A similar process is done for any Parts number needed to add to the record.

Enter the part number and click Add Part Number.

Please note that duplicate contracts, NSN and part numbers are not valid entries on the record.

The final field on this page is the Delegator Instructions or Notes. Enter instructions for the delegatee and include estimated hours if available. This is a Mandatory field. Please note, PDREP does not have an Auto save feature so any work that you wish to save if you cannot submit immediately, please click save draft. The page will refresh and you will have a confirmation at the top of the page that the QALI was saved successfully.

Next, requirement or attribute information must be added to the QALI before it can be sent to the Delegatee. From the New/Edit page, click Add/View Requirements. This will load the Add/View/Edit Requirements Page.

On screen: Add/Edit/View LOD Requirements page

Click Add Requirements to add a new requirement. On the next page, enter the requirement information.

On screen: Requirements Information section

Select the Assigned Functional Area. In the next dropdown, select the KCR number and description. If known, select the subsequent Surveillance Event, Activity and Sub-Activity.

Additional fields that may be entered include the Surveillance Category, Surveillance Techniques, Frequency of Surveillance, and Intensity of Surveillance.

Click Save Requirements to save this to the QALI. Click Cancel Add Reqts to return to the previous page without saving.

After saving, the Add/View/Edit Requirements Page will load. You now have a new button to Submit to Delegatee. If all mandatory fields are entered on the QALI and at least one requirement is entered, you can click Submit to Delegatee. If any Mandatory fields are missing it will bring you back to the

New/Edit page. If Back is selected then user is brought to the Main Page where the user will have to select the New/Edit Face page link to get back into the QALI/LOD.

Submit to Delegatee is also available on the New/Edit page.

When ready to submit, buttons are available at the top and bottom of the delegation including:

Submit to Delegatee; Delete delegation will remove the record from the database. This is only available when the record is in Draft, Withdrawn or Rejected status; if you need to add attachments to the record, click add/view attachments to follow that process; and Cancel will leave the record without saving changes. If ready to submit, click the Submit to Delegatee button.

On screen: DCMA Correspondence page

All information on the correspondence page has been automatically populated based on the information entered by the submitter while creating the QALI.

The page has two sections that can be edited: The Letter Head section and the Letter itself.

The To: field is pre-populated with the Delegatee information.

Review the letter and ensure all information is accurate and add additional information as needed. Click the Back button to return to the QALI- New/Edit page and update any information as necessary.

And click Send when ready to submit to the Delegatee.

On screen: Confirmation page

This will bring you to a confirmation page where the data has been sent successfully. If this page does not display, the record has not been submitted.

Click continue to return to the worklist where you will be able to access your record.

This completes this training video.

Slide 3: Training Resources

Training Resources: For additional training options go to

https://www.pdrep.csd.disa.mil/pdrep_files/reference/training/alltrain.htm

PDREP Help Desk: If none of the above mentioned resources resolve your issue contact the help desk at pdrep-helpdesk@us.navy.mil or call 207-438-1690

Slide 4: Thank You

Thank you for watching “How to create and submit a QALI”.