PDREP

PRODUCT DATA REPORTING AND EVALUATION PROGRAM

ADHOC Search Tool

User Guide
17 SEP 2022

Table of Contents

*Hold the 'CTRL' key and click on paragraph to follow link.

FOREWORD

This guide does not replace or amend any Department of Defense (DOD) instructions, regulations, and/or policies. Its purpose is to assist users with the Ad Hoc Report tab within individual modules of the Product Data Reporting and Evaluation Program (PDREP) - Automated Information System (AIS).

Initially, there was a single generic Ad-Hoc tool that covered all of the PDREP-AIS. This allowed users access to data that they were not necessarily approved to review. The Ad-Hoc tool was then moved into each module separately as its own tab to only allow approved users access to approved data sets and to create, save, and share Ad-Hoc queries.

Ad-Hocs allows a query of a specific record type using abstracted structured query language (SQL) routines.

Refer to the appropriate user guides for additional information about the meaning and use of data regarding the various record types available in PDREP.

INTRODUCTION

This document is intended to guide personnel in the use of Ad Hoc Reports tabs within PDREP-AIS modules.

The PDREP-AIS ADHOC Search tool is designed to allow users to search PDREP's data warehouse. Additional report and search tools are also providing standard search mechanisms to locate records within a particular process or PDREP-AIS application. Proper use of the PDREP-AIS Ad Hoc Reports tabs and search tools should facilitate the user's ability to find and format data into their own unique formats for the generation of local reports and metrics.

The primary purpose of these tools is to permit users the ability to create their own user defined metrics, reports and in some cases their own defined worklists within each module.

This tool was created for smaller, relatively simple queries. If the query is complex or it results in a large data pull (more than 20,000 lines of data) users are encouraged to contact the NSLC Portsmouth Help Desk and coordinate assistance for larger or more complex queries.

In most modules, preformatted user reports are also available and provide a quick overview of data within a particular process or business area, but when the standard report does not suit the user's needs, the ad-hoc allows the flexibility to create their own defined metrics, reports and in some cases, their own defined worklists within the module using user defined data fields and parameters. Data dictionaries for each of the modules are in that module's User Guide.

The PDREP-AIS is accessible via the Product Data Reporting and Evaluation Program website at: https://www.pdrep.csd.disa.mil

Contact us

To report an issue, ask a question, or submit suggestions for improvement to software may be made by active users within PDREP-AIS by hovering over the 'Help' link in the upper left corner or selecting 'Email Technical Support' link located at the bottom of every PDREP-AIS webpage.

Additional contact information is below if you do not have an active PDREP-AIS account:

NSLC Portsmouth Help Desk
Commercial Phone: (207) 438-1690 / DSN 684-1690
FAX: (207) 438-6535 / DSN 684-6535
E-Mail: WEBPTSMH@navy.mil

Mailing Address
Naval Sea Logistics Center Portsmouth
Bldg. 153, 2nd Floor
Portsmouth Naval Shipyard
Portsmouth, NH 03804-5000

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 AD HOC REPORT

Once the user has logged in, the PDREP-AIS home page will display (See **Figure 1.1)** unless they have chosen their own default application page (see User Access User Guide).
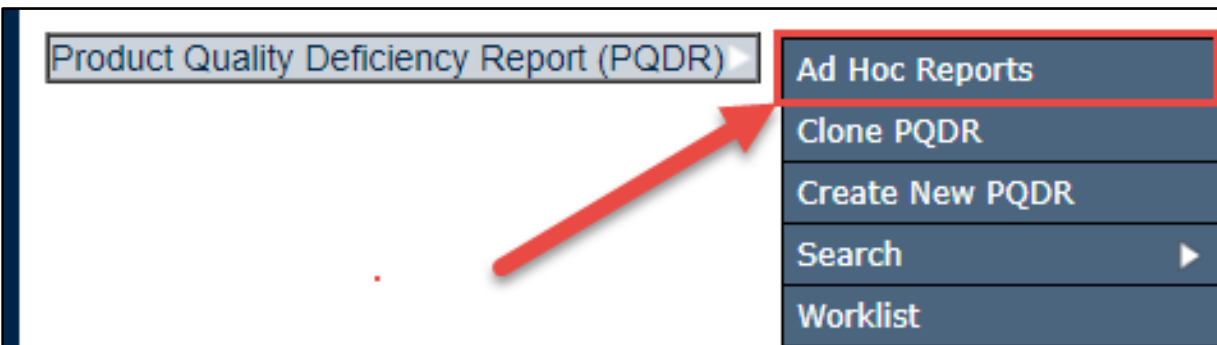

Figure 1.1

NOTE: *Links displayed may vary depending on User's level of access.*

1.1 Accessing Ad Hoc Reports Tab

From the PDREP-AIS Home page, hover your mouse pointer over any PDREP Application (also referred to as 'Modules') or Searches located on the left portion of the screen and a list of 'flyout' hyperlinks for that application will appear (see **Figure 1.2**). In this case, the options for the PQDR module are:

- Ad Hoc Reports

- Clone PQDR

- Create New PQDR

- Search >

- Worklist

Figure 1.2

Selecting the Ad Hoc Reports hyperlink will navigate browser to that tab within the application.

From within any particular module, simply select the tab at the top of the page (see **Figure 1.3**).

Figure 1.3

1.2 Creating Ad Hoc Reports

A. Select Data Record: Some modules may have more than one data set. In this example PQDR has Product Quality Deficiency Reports and Shipment Tracking. Choose the record type from the drop down menu if there are more than one (See **Figure 1.4**).

Figure 1.4

B. After selecting the desired data record set, select the "Get Data Elements" button. The page will expand to include "Select Columns: Data Elements" and "Selected Data Elements" (See **Figure 1.5**).

Figure 1.5

C. It is advisable to know the number of rows before running the query for the first time, checking the "Get Row Count" check box will return the number of lines (not necessarily records) that the query will find in PDREP for the specified parameters. This is especially handy to check if there are more than 20,000 records that match your query. Remember to uncheck the "Get Row Count" box when you're ready to retrieve the actual data set.

D. Adjust "Set maximum row count" as required. This is defaulted to 20,000 rows, which is the maximum. If more than 20,000 rows of data are required, please contact the PDREP Customer Support Desk as you data may be limited.

E. Select elements in the "Data Elements" field to highlight the elements to include in the report. To select more than one element at a time hold down the CTRL key while selecting additional elements; or the shift key to select a contiguous string of elements.

Figure 1.6

F.   Select the "Add Columns" button. The highlighted data elements will move to the "Selected Data Elements" field (See **Figure 1.6**). You may select up to fifty data elements for your report.

To remove elements from the "Selected Data Elements" field, highlight an element in the "Selected Data Elements" and select the "Delete Columns" button.

To move data elements up or down in the "Selected Data Elements" column, highlight a data element and select either the up or down arrow to the right of the table.

Figure 1.7

G.   Set the criteria for which records will appear in the results of the user defined query.

1.   In the "Data Element" drop down box (to the left of the "Add Where" button), select a data element to provide search parameters. Dates or codes are commonly used as search criteria (See **Figure 1.7**).

2.   Select the "Add Where" button and a query build table will appear below with the element in the first row for the first element. Subsequent elements will be added to the bottom of the table.

3.   In the build query table, select an expression from the "Expression" drop down box. Expressions can be   comparative (i.e. greater than, equal, less than), selective (in, not in), wild card (like, not like), or data present (null, not null).

4.   Enter a value for the data element parameter in the "Value" field.

i. Current_Date (ensure user includes the underscore) values work on DD-MMM-YY Data Types. Expressions for Current date are =, <>, <, <=, >, or >=. Values for current date could be Current_Date (for today's date) or Current_Date-7 (for the last week).

ii. For date expressions using the BETWEEN operator, value format should be: DD-MMM-YY AND DD-MMM-YY where DD = day (01, 02...), MMM = Month (JAN, FEB...) and YY = year (00, 01, 02...).

iii. For IN and NOT IN operators, value format should be: XXXXX, XXXXX where XXXXX is any number or appropriate characters.

iv. For LIKE and NOT LIKE operators, value format should be: %XXXX% %XXXX, or XXXX% where XXXX is any number or character and the % is used as a wildcard.

v. For NULL and NOT NULL operators, there should be no value parameters.

5. Select a logical expression (AND/OR) from the "Logical Expression" drop down box if more than one data element parameter is entered. Do not select a logical expression for the last element in the table.

6. Continue to build query table as required by repeating steps G.1 through G.5.

7. If an error has been discovered during the build process, you can remove a single or multiple lines by selecting the "Delete" check box at the end of a row then selecting the "Delete" button in the heading row. This will delete the line(s) and leave the rest of the build table intact.

8. If you need to start over again, you can select the "Reset" button and clear the query build table.

H. Select the "Run Query" button to create the report. The results will display on the "Ad Hoc Query Results" page (See **Figure 1.8**). Remember to deselect the "Get Row Count" check box on subsequent queries after you have determined the size of data retrieved (See **Figure 1.9**).

Figure 1.8

I. The results table can be sorted either by increasing/decreasing order by selecting the header for the column to be sorted.

Figure 1.9

J. On the "Ad Hoc Query Results" page, select the "Print" button to print the web page.

K. Select the "Back" button to return to the previous screen. The user can adjust the query and run it again as necessary until the report returns the desired data.

L.   You can download the Ad Hoc results by selecting "here" in the "Data Download: Click here to download data in Microsoft Excel format" link at the top and bottom of the web page.

M.   Ad Hoc Reports can be saved and used for future use without needing to rebuild the same or similar query. Refer to Section 1.2 SAVING ADHOC REPORTS for more details.

1.3 Saving Ad Hoc Reports

A. Ad Hoc Reports can be saved and used for future use without needing to rebuild the same or similar query. To do this, select the "Save Ad Hoc to Profile" button to save the query you just created (See **Figure 1.10**).

Figure 1.10

B. After selecting the Save Ad Hoc to Profile" button, you will be taken to the "Save to Profile" page (See **Figure 1.11**).

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)

Home • Help ▶   User Profile: ROBERT (BETA) SANDERSON ▶ • Logout

PQDR Worklist | Create New PQDR | PQDR Search/Reports | **PQDR Ad hoc Reports** | PQDR Clone

Save to Profile

Instructions
Please follow these steps to save Report to your Profile:
1. Enter a Report Title
2. click **Save to Profile**

To delete existing reports:
1. Check the box for the report(s) to be deleted
2. Click the **Delete** button in the header of the table

Click **Back to CAR Ad Hoc** to return to Ad hoc Reports

Report Title: [   ]

[Save to Profile]   [Back to PQDR Ad hoc]

No existing reports

PDREP-AIS Version : 6.0.24.403, Build Date : 06/15/2022
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Figure 1.11

C.   Enter a name for query to be saved in the "Report Title" block.

D.   Select the "Save to Profile" button and the report will appear in the list of Existing Reports.

E.   Select the "Back to Ad Hoc" button to return the "Ad Hoc Report" page where you can access all the reports you've saved and run them again as needed (See **Figure 1.11**).

F.   To run an Ad Hoc report you previously created

   1.   Select the report from the "My Ad Hocs:" drop down selection box

   2.   Select the "Open My Ad Hoc" button. The Ad Hoc screen is automatically filled in with the Ad Hoc criteria you saved before.

   3.   You can run the query as is or make modifications as desired using the previous steps. You'll have the option to save the updated query if desired.

   4.   Select the "Run Query" button to create the saved/updated report.

1.4 Managing Ad Hoc Reports

Once the user has a saved ad hoc, they can delete saved ad hoc from their list if the ad hoc no longer suits their needs or they can share the ad hoc with other users. Sharing ad hoc is contingent upon the other user also having access to the module and possibly the right level of access within the module.

A. Selecting the "Manage My Ad Hoc" button takes you to your existing reports (See **Figure 1.12**) where you can remove Ad Hoc reports you no longer need, or share an Ad Hoc with other PDREP users.

Figure 1.12

NOTE: If you don't have an Ad Hoc report saved to your profile, the "My Ad Hocs" drop down selector, "Open My Ad Hoc" and "Manage My Ad Hoc" buttons will not appear

B. To remove a saved report from your profile:

1. Check the box next to the report in the "Delete" column

2. Select the "Delete" button.

3. Ad Hoc report is removed from your list.

C. To share your Ad Hoc with other PDREP users

1. Select the link of the Ad Hoc in the "Share Ad Hoc" column, which will navigate you to a send message page.

2. Select the activity (DoDAAC) from the "Choose Activity" drop down list. A secondary drop down list will appear.

3. Select the person at that activity from the "To PDREP User:" drop down list.

4. Select the "Share Ad Hoc" button, which will navigate you to a PDREP message" page, verifying your message was sent.

5. Select "continue" link, which will navigate you back to the "Save to Profile" page.

2 AD HOC REPORT RESULTS

2.1 Reviewing Results

A. Users should use caution when reviewing ad hoc results. The first thing to take notice is the number of records returned. The ad hoc tool will return only 10,000 records on the screen in PDREP. This assists in keeping the user's connection from running sluggishly. There may be up to 20,000 records in the pull and all of the pulled records will appear in the spreadsheet if downloaded (see **Section 2.2**)

B. If the total number of records pulled is 20,000, there is the possibility that you do not have all of the records that fit your criteria. Your data may be "clipped" and there may be more records than what is in your ad hoc results. You may need to refine your search.

C. There is the appearance of "duplicate" records. For example, if you run a query of a user profile and you input PRIMARY DODAAC and SECONDARY DODAACs in the query, a single user may show multiple times depending on how many SECONDARY DODAACs are in their profile. The ad hoc returns every unique instance a record shows in the database. If USER has a PRIMARY DODDAC of DoDACO and has SECONDARY DODAACS that are DODACA, DODACB, DODACC, DODACD, and DODACE. The query returns 5 lines but there is only 1 USER (See **Figure 2.1**)

Ad Hoc Reports	User Search	
Ad hoc Query Result		
Print Back		
Save User Ad hoc Report to Profile		
Row Count: 5		
Data Download: Click here to download data in spreadsheet		
Users - Record		
***User ID**	**Primary DODAAC**	**Secondary DODAAC**
USER	DODACO	DODACA
USER	DODACO	DODACB
USER	DODACO	DODACC
USER	DODACO	DODACD
USER	DODACO	DODACE
Print Back		
Save User Ad hoc Report to Profile		
Row Count: 5		
Data Download: Click here to download data in spreadsheet		

PDREP-AIS Version : 6.0.24.403, Build Date : 06/15/2022
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Figure 2.1

D. The duplicate records appearance can be compounded, depending on how many elements have unique instances. For example, as a PDREP Coordinator, you want to know which personnel had what level of access and simply added ACCESS to the query. As there are 48 unique accesses, USER1 would show 240 times! (See **Figure 2.2**)

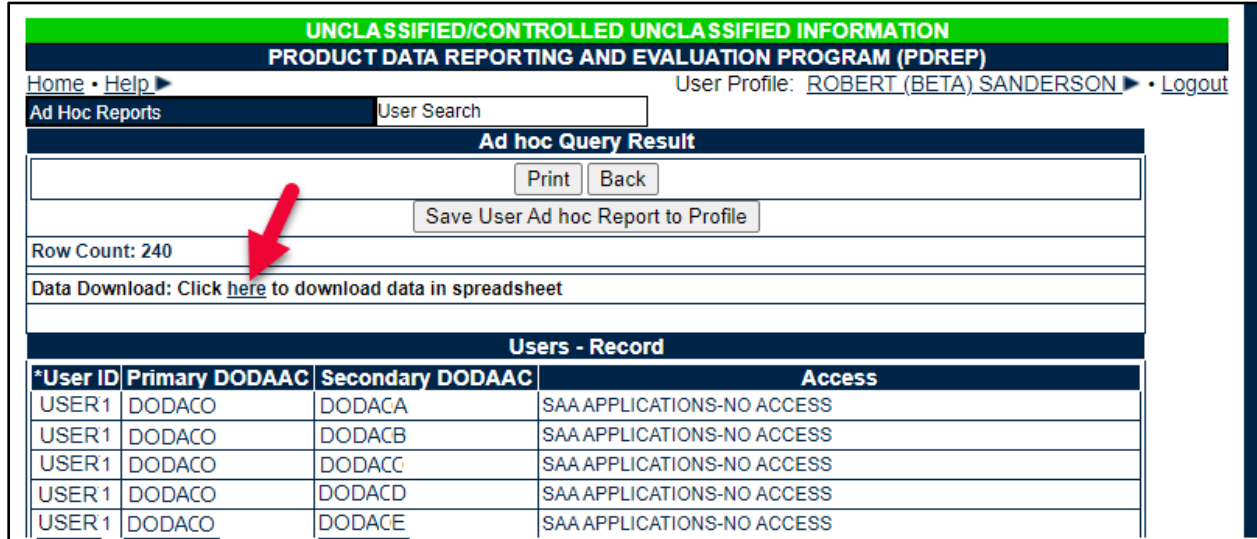| Ad Hoc Reports		User Search	
Ad hoc Query Result			
Print Back			
Save User Ad hoc Report to Profile			
Row Count: 240			
Data Download: Click here to download data in spreadsheet			
Users - Record			
*User ID	Primary DODAAC	Secondary DODAAC	Access
USER1	DODACO	DODACA	SAA APPLICATIONS-NO ACCESS
USER1	DODACO	DODACB	SAA APPLICATIONS-NO ACCESS
USER1	DODACO	DODACC	SAA APPLICATIONS-NO ACCESS
USER1	DODACO	DODACD	SAA APPLICATIONS-NO ACCESS
USER1	DODACO	DODACE	SAA APPLICATIONS-NO ACCESS

Figure 2.2

E. Users must also be aware of what data they are asking. Refer to your Module User Guide for the data dictionary. In some modules there may be an ADDED DATE and a SUBMITTED date. A SUBMITTED date may be when a user entered a record into an IT system whereas an ADDED date may be when the record entered the PDREP database. For example if a record originated from a different IT system and was created on MAY 1 (its SUBMITTED date), but the time lapse was two months before it needed to be transferred to a POC in PDREP, the ADDED date may be JUL 1.

F. Beware of mutually exclusive data points. The below will return "No data found" because you cannot have a Secondary DoDAAC that is the same as your Primary DoDAAC. This would return no data found.

    PRIMARY DODDAC   =   DODAC1   AND
    SECONDARY DODAAC   =   DODAC1

G. Be cognizant that records may be live and flowing from point to point. You can run an ad hoc and return 125 records and rerun the ad hoc 15 minutes later and only have 100 records. The report is only representative for that point in time.

H. Selecting the header of a column in the results will perform a simple sort or the table (ascending/descending) based on the data in that column.

2.2 Downloading Results into Spreadsheet

A. You can download the Ad Hoc results to MS Excel by selecting "here" in the "Data Download: Click *here* to download data in Microsoft Excel format" link at the top or bottom of the results page. (See **Figure 2.3**)

UNCLASSIFIED/CONTROLLED UNCLASSIFIED INFORMATION			
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Home • Help ▶   User Profile: ROBERT (BETA) SANDERSON ▶ • Logout

Ad Hoc Reports   User Search

Ad hoc Query Result

Print   Back

Save User Ad hoc Report to Profile

Row Count: 240

Data Download: Click here to download data in spreadsheet

Users - Record

*User ID	Primary DODAAC	Secondary DODAAC	Access
USER1	DODACO	DODACA	SAA APPLICATIONS-NO ACCESS
USER1	DODACO	DODACB	SAA APPLICATIONS-NO ACCESS
USER1	DODACO	DODACC	SAA APPLICATIONS-NO ACCESS
USER1	DODACO	DODACD	SAA APPLICATIONS-NO ACCESS
USER1	DODACO	DODACE	SAA APPLICATIONS-NO ACCESS

Figure 2.3

B. Downloading the results into a spreadsheet may require reformatting of data. Columns may need to be formatted to a number as they may be saved as a character string. Dates may need to be formatted as 19XX and /or 20XX.

3 SUMMARY

This concludes the instructions for US Government and US Government support contractor access to the PDREP-AIS. For instructions on other PDPREP applications, please consult the user guides provided for those applications. The PDREP Customer Support Desk is available to answer additional questions or to assist in data changes or exception processing and can be contacted as follows:

E-Mail: **webptsmh@navy.mil**

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Fax: (207) 438-6535