Contract Award and Delivery Data (CAD)

User Guide
10 October 2023

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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 Supply Discrepancy Report (SDR) 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 documents 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 <u>NOT</u> real data and it is <u>NOT</u> 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

- <u>SECNAVINST 4855.3</u> – Product Data Reporting and Evaluation Program
- <u>FAR Part 42.15</u> – Contractor Performance Information
- <u>Past Performance Information Retrieval System-Statistical Reporting (PPIRS-SR) Letter (December 21, 2007)</u> – DoD Deployment of Past Performance Information Retrieval System-Statistical Reporting

INTRODUCTION

This document is intended to guide personnel in the use of the Product Data Reporting and Evaluation Program – Automated Information System (PDREP-AIS) Contract Award and Delivery Data (CAD) 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

To report an issue, ask a question, or submit suggestions for improvement to software may be made by active users: Contact us by submitting a help desk ticket either via the "Contact Help Desk" button in the lower right corner of our PDREP website or via the "Help" menu within the PDREP-AIS Application.

Additional 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

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 ACCESS LEVELS

No Access	User has no access to any CAD records
View Access	User may only view CAD records. User will not be able to add, update, or delete any information.
Non-Management Access	User will be able to add, update, or delete CAD records. User will only be able to update or delete CAD records that they have added to PDREP. They will not be able to modify CAD records collected from WAWF, EDA, MOCAS, or other Users from within their Activity.
Management Access	User will be able to add, update, or delete CAD records. User will be able to update or delete CAD records regardless of origin provided their Primary or Secondary DODAAC in their PDREP User Profile matches the first 6 characters of the contract number.
Full Access	Reserved for PDREP Admins only.

Table 1

2 MAIN PDREP APPLICATION SCREEN

Once you have logged in, the PDREP Home page will display (see **Figure 2.1**). You may not see all of the options listed depending on your level of access.

*Please refer to PDREP User Access Request and Login Procedures.

Figure 2.1

NOTE: *Your PDREP home page view may be different depending on which applications/searches you have requested and are authorized for use. Please submit an access change request if you need additional permissions.*

2.1 Finding the Fly-Outs

Hover your mouse pointer over any PDREP Application located on the upper left portion of the screen and a list of sub-links for that application will appear (see **Figure 2.2**).
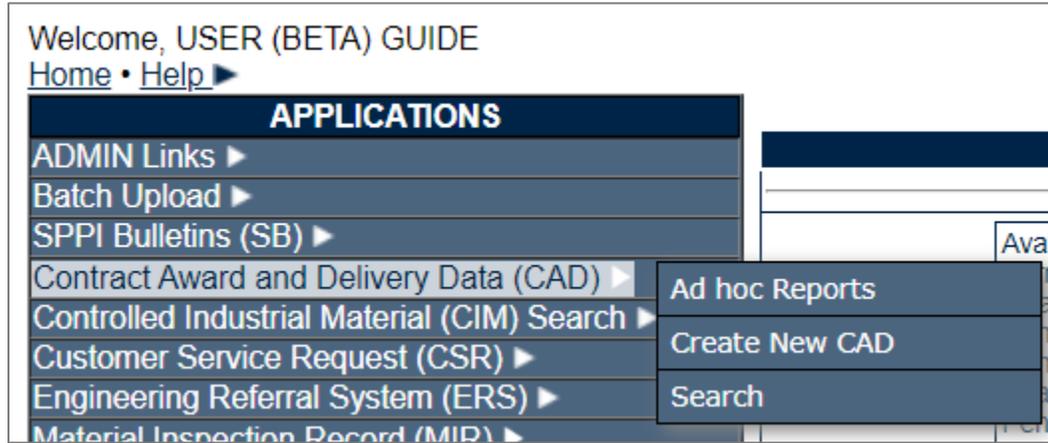
Figure 2.2

2.2 Selecting the Fly-Out Link

Selecting either of the sub-links will allow the user to go directly to that page within the application (see **Figure 2.2**).

3 SEARCHING AND VIEWING EXISTING CAD RECORDS

3.1 Searching for a Record

A.   Select the 'Search' hyperlink from the CAD fly-out menu (see **Figure 3.1**).
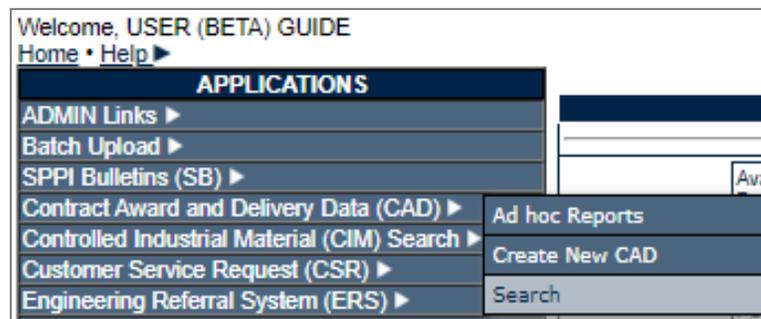
Figure 3.1

B.   The Contract Award and Delivery Data page displays (see **Figure 3.2**).

Figure 3.2

C.   On the "CAD Search" tab, users may search on combinations of Contract Number, Order Number, CAGE Code, and/or date ranges of records added to PDREP. Enter data as described below:

NOTE: *Data must be entered in either the "Contract Number" or "CAGE Code" fields to retrieve data in the CAD Search.*

1.   **Contract Number:** Enter a valid contract number (omitting dashes) to locate a specific contract in PDREP.

NOTE: *Partial contract numbers containing at least six characters (i.e. DODAAC) may be used in lieu of complete contract number.*

2.   **Order Number**: If a Contract Number was entered (from a.), an Order Number may be entered to further filter results of the search.

3.   **CAGE Code:** Enter a complete five-character CAGE Code.

4.   **Start (Added Date) and End (Added Date):** default to one year before the query and the day of the query, respectively. These dates may be changed if desired. These dates limit returned results base on the Added Date of the record. The Added Date refers to the date the CAD record was entered into the PDREP-AIS (Automated Information System). Expand the date range by entering the dates or using the calendar icons as needed to ensure records are included that may be older than default date range of one year.

NOTE: *If the full Contract Number was entered, the date ranges will be ignored.*

D. Click the 'Search' button. Search results display at the bottom of the page (see **Figure 3.3**).

Figure 3.3

E. Results of the search can be downloaded by selecting the "here" hyperlink, located directly above the results.

3.2 Viewing a Record

A. Selecting the link in the "Contract Number – Order Number" column for the record of interest displays the "Contract Award and Delivery Data – View Record" menu (see **Figure 3.4**).

Figure 3.4

B.   To print the displayed data, select the 'Print' button (see **Figure 3.4**).

C.   To return to the previous screen, select the 'Back' button. See the **Appendix** section of this guide for the data dictionary and description of the data fields.

4 ADDING, EDITING, OR DELETING CAD DATA

4.1 Adding a CAD Record

A.   To add a new contract record, select the "Create New CAD" tab (see **Figure 4.1**) or the "Create New CAD" fly out hyperlink (see **Figure 3.1**).

Figure 4.1

B.	After selecting the Create New CAD hyperlink or tab, the ADD Contract Award and Delivery Data screen will appear (see **Figure 4.2**).

Add Contract Award and Delivery Data

Instructions
(M) denotes a mandatory field
1. Enter mandatory fields
2. Enter optional fields, if information is known
3. To add a Contract Line Item (CLIN), click **Add Item**
4. To edit/delete an existing CLIN, click **Edit** or **Delete**
5. Correct format for date fields is MM/DD/YYYY or use Calendar
6. To save the record, click **Save**
7. To cancel the process, click **Cancel**

(M) Contract Number: _____   Order Number: _____
(M) CAGE Code: _____
Contract Admin Office: _____
Award Date: _____

(M) Add Item

Save   Cancel

Figure 4.2

C.	Selecting the 'Cancel' button will exit the screen and return to the "CAD Search" tab without saving any data.

D.	Enter a valid, 13-digit Contract Number and CAGE Code. Complete remaining fields if the information is available. Fields marked "(M)" are mandatory. Without entering these fields, you are unable to continue with the record.

E.	Select the '(M) Add Item' button.

F.	The "Add CAD Item" table opens up at the bottom of the page (see **Figure 4.3**).

Figure 4.3

G. Complete the mandatory fields in the "Add CAD Item" row.

    1. **Item Number:** 4 digit CLIN

    2. **FSC:** 4-digit Federal Supply Class

    3. **Quantity:** Number of units accepted

    4. **Price:** Unit Price of item

H. Select the 'Save Item' button to add the item to the CAD record.

I. Select the 'Cancel Item Add' button to close out an open "Add CAD Item" table and view only the line items that have already been associated with the record (see **Figure 4.4**).

Figure 4.4

J. To add more line items, click the '(M) Add Item' button. Repeat steps 5 through 9 until all information has been added (see **Figure 4.5**).

Add Contract Award and Delivery Data

Instructions
(M) denotes a mandatory field
1. Enter mandatory fields
2. Enter optional fields, if information is known
3. To add a Contract Line Item (CLIN), click **Add Item**
4. To edit/delete an existing CLIN, click **Edit** or **Delete**
5. Correct format for date fields is MM/DD/YYYY or use Calendar
6. To save the record, click **Save**
7. To cancel the process, click **Cancel**

(M) Contract Number: [   ]   Order Number: [   ]
(M) CAGE Code: [   ]
Contract Admin Office: [   ]
Award Date: [   ] 📅

[(M) Add Item]

[Save] [Cancel]

Item Number	FSC	NIIN	SMIC	Required Date	Delivery Date	Shipment Date	Acceptance Date	Qty	Units	Price	Ship#	Mat Code	Mat-JOKO	Mat Desc	Edit	Delete
001	9999							10		$1.00					Edit	Delete
002	9999							20		$2.00					Edit	Delete
003	9999							30		$3.00					Edit	Delete

Figure 4.5

K. Select the 'Save' button to save changes to the Contract Award and Delivery record.

L. Select the 'Cancel' button to exit the Add Contract Award Data screen without saving any new unsaved changes.

4.2 Editing a CAD Record

A. To edit existing contract award delivery data, the user should follow the search procedures in Section 2 to locate a specific record. Once the record is located, select the 'Edit' hyperlink (see **Figure 4.6**)

NOTE: *The 'Edit' and 'Delete' links may not appear depending on your Activity and level of access in your user profile.*

Figure 4.6

B.   The Edit Contract Award and Delivery Data screen display (see **Figure 4.7**).

Figure 4.7

C.   To remove a Contract Line Item Number (CLIN) or Delivery, select the 'Delete'
     button next to the CAD line item (see **Figure 4.7**).

D.   Select the 'Edit' button to begin editing the CLIN. The "Edit CAD Item" table opens
       at the bottom of the page (see **Figure 4.8**).

Figure 4.8

E.   To edit data in the contract award data record:

1.   Enter mandatory fields (**M**).

2.   Enter optional fields, if information is known.

3.   Select the 'Save Item' button to save changes to the Line Item.

4.   Select the 'Cancel Item Edit' button to abort any changes made to the Line
       Item.

5.   Select the 'Save' button to save changes to the CAD record.

6.   Select the 'Cancel' button to abort any unsaved changes to the CAD record.

See this guide's **Appendix** for an explanation of the data fields.

4.3 Deleting CAD Records

A.   To delete an existing contract record from PDREP, follow the search procedures in
       Section 3. The result set should appear similar to that shown in **Figure 4.9**.

B.   Note that deleting records is only possible for records which the user has
       permission, which is based on their user profile. If you have permission for deletion,
       a 'Delete' hyperlink will be displayed under the "Delete" column in the result set.

Figure 4.9

C. Click the 'Delete' hyperlink under the Delete column for the record of interest.

D. A pop up will appear to confirm the record selected for deletion. Click 'Yes' to affirm the record should be deleted. Click 'No' to cancel the request.

E. To print a copy of what is to be deleted, click the 'Print' button at the top of the page.

F. To abort the delete, click the 'Cancel' button at the top of the page.

5 CAD AD HOC REPORTS

5.1 Accessing CAD Ad Hoc Reports

A. To access the CAD Ad Hoc report select the 'Ad hoc Reports' hyperlink from the Contract Award and Delivery Data (CAD) fly out menu (see **Figure 5.1**).

Figure 5.1

B. If already working in the CAD module, the user may access the CAD Ad Hoc Reports screen by selecting the 'CAD Ad Hoc Reports' tab (see **Figure 5.2**).

Figure 5.2

C. After selecting the hyperlink or tab, the CAD Ad Hoc Report screen will be displayed (see **Figure 5.3**).

Figure 5.3

5.2 Using the CAD Ad Hoc

Please refer to the Product Data Reporting and Evaluation Program (PDREP) ADHOC Search Tool User Guide for detailed assistance using the CAD Ad Hoc.

The ADHOC query generator can be used to generate a variety of reports; all results are downloadable to MS Excel spreadsheets. On-screen instructions are available as a reminder on how to create the ADHOC query. The web page provides a method for users to choose a record type to query, select specific data elements from that record, and base the query on criteria like a date range or code used in the record to get the results.

Users can run the query and adjust it if it is not exactly what they're looking for by returning to the ADHOC Report page after running a query. The results can be downloaded into MS Excel when complete.

A. The Product Data Reporting and Evaluation Program (PDREP) ADHOC Search Tool User Guide. The User Guide can be located by clicking on the link below:

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

B. While working in the module the user guide page can also be found by clicking the User Guides selection under the Help menu on the top of any PDREP window (see **Figure 5.4**).
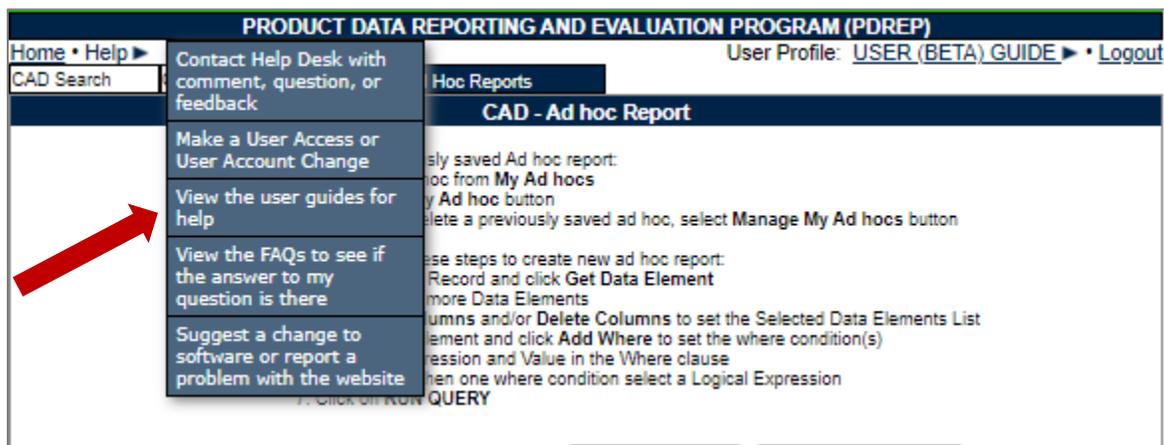
Figure 5.4

After selecting either the fly out option or the hyperlink in this section, the PDREP Main Page Guides and Manuals page will be displayed (see **Figure 5.5**).

Guides and Manuals

PDREP Guides and Manuals

General

- Attaching a file in PDREP
- Customer Service Request (CSR)
- Search Tools
- User Access Request

PDREP Tools

- ADHOC Search
- Contract Award & Delivery (CAD) Data Application ⬅
- Contractor Profile
- Engineering Referral System (ERS)
- Material Inspection Records (MIR)
- Quality Assurance Letter of Instruction (QALI)
- Receipt Inspection Management System (RIMS)
- SPPI Bulletin (SB)
- Supply Action Module (SAM)
- Supplier Audit and Assessment (SAA)
- Supply Discrepancy Report (SDR)
- Survey, Special Quality, & Test Records Applications
- Virtual Shelf (VS)

Product Quality Deficiency Reports (PQDR)

- Originator Documents
  - Originator Instructions
  - Local Purchase Instructions
- Screening Point Documents
  - Screening Point Instruction
  - Army Master Screener Instruction
  - ~~Action Point~~ Documents
  - Action Point Instructions
  - Army Action Officer Instruction
- Support Point Documents
  - 1227 Instructions
  - QAR Investigation
  - DRPM Investigation

Other Programs

- Exhibit & Shipment Tracking
- PDREP Prime Contractor
- Warranty & Source of Repair Tracking

DCMA Tools

- DCMA Corrective Action Request (CAR)
- DCMA Letter of Delegation (LOD)
- DCMA Supplier Risk System (SRS)
- DCMA Surveillance Plan (SP)

Figure 5.5

6 SUMMARY

This concludes the Contract Award and Delivery Data (CAD) 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 CAD 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 CAD module: 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.

Contact information for the support desk is provided below.

Commercial:	207.438.1690
DSN:	684.1690
Fax:	207.438.6535

7 APPENDIX

Data Dictionary

PDREP Field Name	Definition
Acceptance Date	The date of final acceptance by the US Gov't for the material delivered.
Added Activity	DODAAC or User Code of the activity that added the record to PDREP.
Added Date	Date record was added to PDREP.
Award Date	The calendar date upon which the contracting officer authenticated/awarded the contract.
CAGE	A CAGE Code is a five (5) position code that identifies companies doing business with the Federal Government.
Contract Admin Office	DODAAC of the Contract Administrative Office for the contract.
Contract (Line) Item Number	A four digit sequential (not necessarily consecutive) number that identifies a separately identifiable item or service associated with a solicitation or contract. Line item numbers should be assigned in accordance with the uniform contract line item numbering system.
Contract Number	The Procurement Instrument Identification Number (PIIN) plus, or, for orders under contracts awarded by other Federal agencies, the contract number of that Federal agency as it appears in the contractual instrument. Also may include a contracts order number (aka SPIIN, Delivery Order Number) when available. An order for supplies placed against an established contract or with Government sources.
Delivery Date	The date material was delivered by the vendor to the US Gov't.
FSC	Federal Supply Class
MAT #	Reference Number for records entered from the Navy shipyard IT system known as Material Access Technology (MAT) system.
NIIN	National Item Identification Code
Quantity	The total number associated with the act of final acceptance
Required Date	Latest date which material or services are *required* to be delivered IAW the contract. Scheduled delivery per the contract.
Past Performance Indicator	Indicates whether record should be used for supplier past performance delivery evaluation in DoD Past Performance Information Retrieval System-Statistical Reporting (PPIRS-SR) program.
Shipment Date	Date the vendor shipped material.
Shipment Number	Shipment Number used to track a shipment.

PDREP Field Name	Definition
SMIC	Special Material Identification Code
Unit Price	The price associated with goods or services procured.
Units	A commonly understood acronym, abbreviation, or other character string that stands for the Unit-Of-Measure for the Line Item. I.e. EA = each, FT = Foot, LB = Pound
Update Activity	DODAAC or User Code of the activity that updated the record to PDREP.
Update Date	Date record was last updated in PDREP.