



# DCMA Surveillance Plan (SP) KTR Details

User Guide  
29 January 2024

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*Click link to navigate to a specific section of the guide.*

## FOREWORD

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

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

## REFERENCES

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

## INTRODUCTION

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

### Getting Access

- **First Time Users**

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

- **Existing PDREP Users**

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

### Contact us

Contact us 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 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: 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.

#### **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 SURVEILLANCE PLAN ACCESS

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

### 1.1 Access Levels Functions

**Table 1.1**

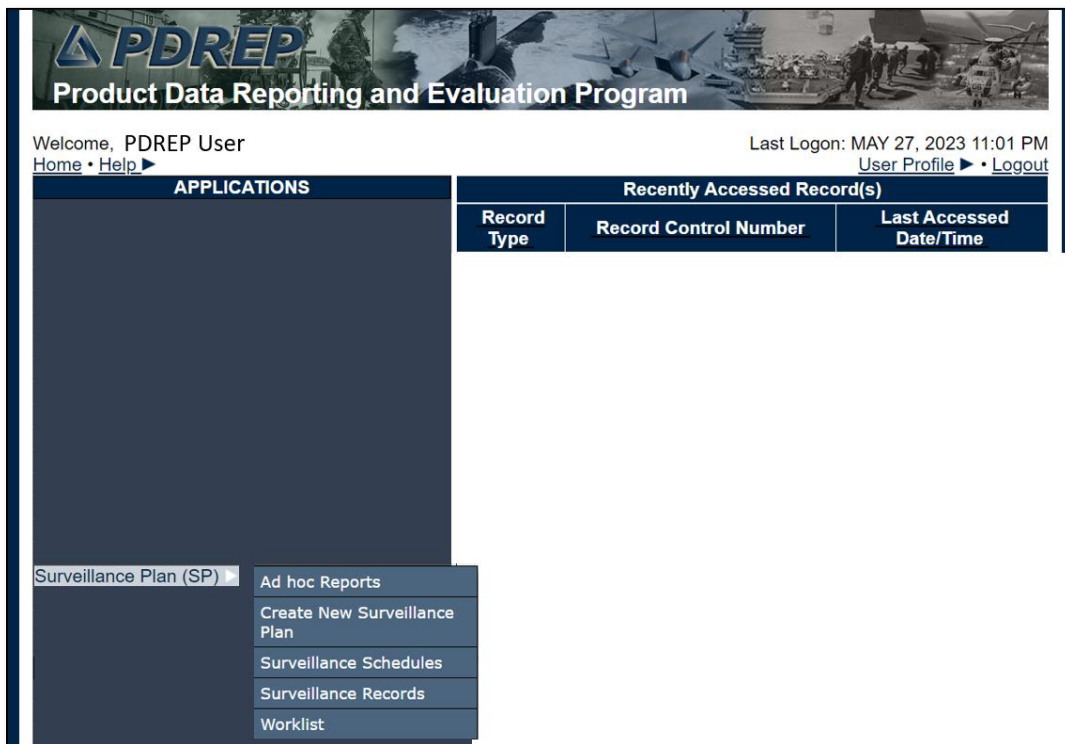
Role	Plan	Scheduler	Records
NO ACCESS	If a user does not have access to the PDREP-SP application, the program link will not appear on the user’s PDREP-AIS Main Menu.	If a user does not have access to the PDREP-SP application, the program link will not appear on the user’s PDREP-AIS Main Menu.	If a user does not have access to the PDREP-SP application, the program link will not appear on the user’s PDREP-AIS Main Menu.
VIEW ACCESS	View a SP Access SP Ad Hoc Reports	View Scheduler Access View Scheduler Ad Hoc Reports	View Records Access Records Ad Hoc Reports

Role	Plan	Scheduler	Records
FUNCTIONAL SPECIALISTS (FS)/Team Lead	View Access Plus: <ul style="list-style-type: none"> <li>• Create a Plan</li> <li>• Edit a Plan</li> <li>• View History Page</li> <li>• Add attachments (their uploads)</li> <li>• Delete Attachments (their uploads)</li> <li>• View all attachments</li> <li>• Add KCR to Plan</li> <li>• Assign themselves to KCRs</li> <li>• Remove themselves from KCRs</li> <li>• Assign KCR to a user within their team</li> <li>• Edit a KCR they are assigned to</li> </ul>	View Access Plus: <ul style="list-style-type: none"> <li>• For assigned KCRs, users can view, create and edit Schedule               <ul style="list-style-type: none"> <li>○ Cancel an occurrence with note</li> <li>○ Reschedule an occurrence with note</li> <li>○ Delete an occurrence with note</li> </ul> </li> </ul>	View Access Plus: <ul style="list-style-type: none"> <li>• For occurrences assigned to the FS users can create, edit and complete Records               <ul style="list-style-type: none"> <li>○ Send message to review Record</li> </ul> </li> </ul>
Supervisor/Contract Management Office (CMO)	FS/Team Lead Plus:  Respond and send supervisor messages to FS	FS/Team Lead Plus:  Reassign occurrences to different FS that is assigned to the KCR (Team Specific)	FS/Team Lead Plus:  Reassign a draft or reopened Record from one FS to another FS that is assigned to the KCR. (Team Specific)  Reopen a Record. (Team Specific)  Delete a draft Record. (Team Specific)  Create a Record outside of the Scheduler (expected Jan 2023).
<i>Headquarters (expected for future release)</i>	<i>Same as Supervisor/Contract Management Office (CMO) Plus: Delete a completed Record with comment</i>	<i>Supervisor/Contract Management Office (CMO) Plus: Delete a completed Record with comment</i>	<i>Supervisor/Contract Management Office (CMO) Plus: Delete a completed Record with comment</i>

## 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.



The screenshot displays the PDREP homepage. At the top, there is a banner with the PDREP logo and the text "Product Data Reporting and Evaluation Program". Below the banner, the user is greeted with "Welcome, PDREP User" and "Last Logon: MAY 27, 2023 11:01 PM". There are links for "Home", "Help", "User Profile", and "Logout".

The main content area is divided into two sections. On the left, under the heading "APPLICATIONS", there is a dark blue sidebar menu. The "Surveillance Plan (SP)" option is highlighted, and a dropdown menu is visible with the following items: "Ad hoc Reports", "Create New Surveillance Plan", "Surveillance Schedules", "Surveillance Records", and "Worklist".

On the right, under the heading "Recently Accessed Record(s)", there is a table with the following structure:

Record Type	Record Control Number	Last Accessed Date/Time
-------------	-----------------------	-------------------------

**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**).



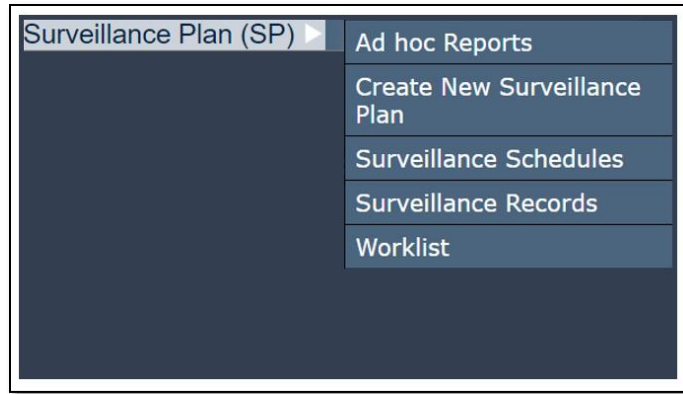


Figure 1.2

## 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 2.2a**).

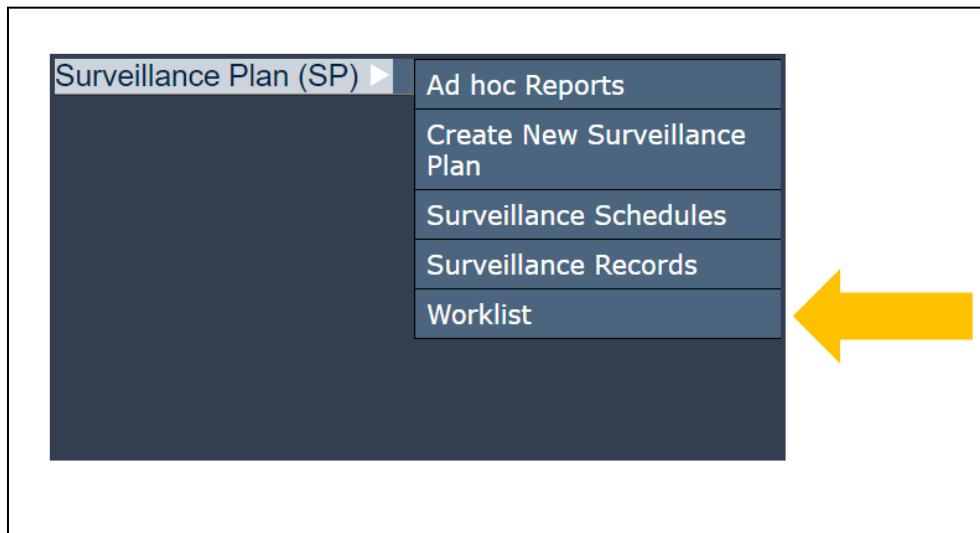


Figure 2.1

### 2.2 Generating a Worklist

To generate a Worklist, enter data element(s) and click “Display Worklist” to show results. Examples of this are shown in **Figure 2.2a** and **Figure 2.2b**.

**NOTE:** Mandatory fields identified with a **(M)**. When mandatory fields are not used, there will be an error message shown (**Figure 2.2a**).

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

### 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.

**(M) Worklist Type:**

**(M) Date SP Updated:** From  To

**Primary Location:**   **Status:**

**User ID:**

**Team Code:**

**CMT DoDAAC:**

**KCR UID:**

**Filter By:** **CAGE Code:**  **Status:**

< 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
----------------	--------------	------------	------------	------------------	-------------	-----------------	----------

PDREP-AIS Version : 6.0.28.312, Build Date : 10/17/2023

**Figure 2.2a**

A Primary Location (CAGE Code), User ID, Team Code, KCR UID, or DoDAAC must be used. Searches are refined by using a combination of data elements. If a minimum of one (M) data field is not entered, an error message will display. In addition, the data field "(M) Date SP Updated" defaults to the last 365 days but may be adjusted to limit search parameters.

**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

### 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  
 4. Select **Status** as optionally needed  
 5. Click **Display Worklist** button

**(M) Worklist Type:** KTR Details ▼

**(M) Date SP Updated:** From 09/19/2022 To 09/19/2023

**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 2.2b**

**Associated Data Fields for Figure 2.2b**

- **(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:** First date in the specified date range. Defaults to 365 days preceding the current date. This date can be increased or decreased for user-specific search criteria.
- **(M) Date SP Updated: To:** Final date in the specified date range. Defaults to the current date but may be edited.
- **(M) KCR UID:** The unique identifying number for a KCR. Full or partial KCR UIDs may be added to search on.
- **(M) Primary Location:** The Commercial and Government Entity (CAGE) Code of the contractor associated with Surveillance Plan. This field is restricted to five alphanumeric characters and validates against the PDREP database. See the "Associated Button Functionality" (**Section 3.2.9** of this document) for CAGE Lookup instructions.
- **Status:** The status of the Surveillance Plan.
  - **Any:** Includes all active and archived statuses.
  - **Active:** A Plan engaged in ongoing surveillance.
  - **Archived:** A Plan for where surveillance is not currently being performed.

- **(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 dropdown where a user can choose to view information specified at the KCR, KTR, or RECORD levels.

Associated Button Functionality for **Figure 2.2b**

- **Display Worklist:** Loads a result set based on the criteria as inputted onto 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. When a CAGE is selected from the lookup page, it populates the field associated with the button.

### 2.3 Worklist Search Results

Select the “Display Worklist” button to perform a search after entering minimum mandatory fields. Search results will be accessible at the bottom of the page with a numbered “Results Count” displaying above the Worklist itself (**Figure 2.3**). Returned results are downloadable to a spreadsheet by selecting the associated hyperlink.

If the return for the selected criteria doesn’t have an associated Plan(s), a message of “No data found” will display beneath the “Display Worklist” button.

**NOTE:** Depending on the Worklist Type the user chooses in the dropdown, results will be different. See **Figure 2.4** for the different header types depending on the worklist type selected.

The screenshot shows a search results interface. At the top, there is a yellow banner with the text: "Search Results Download: Click [here](#) to download data in spreadsheet". Below this is a filter section with two dropdown menus: "Filter By: CAGE Code:" and "Status:", both currently set to "<SELECT>". There are "Apply" and "Reset" buttons below the filters. At the bottom of the interface, there are navigation controls: "< Prev", "Page 1 of 1", "Next >". To the right of these is a yellow banner that says "Result count: 1". Further right is a dropdown menu set to "50" with the text "rows per page" next to it.

**Figure 2.3**

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 2.4

Associated Data Fields for **Figure 2.4**

KCR Worklist Results

- **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:** Based on the Assigned Functional Area selected, choose the KCR# & Description from the dropdown. The Surveillance Events data field will then populate based off this selection.
- **KCR Status:** The status of the KCR
  - **Any:** Includes all active and archived statuses.
  - **Active:** A KCR engaged in ongoing surveillance.
  - **Archived:** A KCR for where surveillance is not currently being performed.
- **KCR UID:** Auto-populated, non-editable, 8-digit unique identifier of the KCR.
- **KTR Attachments:** Select the “Click Here” hyperlink located under the “KTR Attachments”. This hyperlink opens to the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Plan.
- **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 a view-only page of the Record.

After displaying the worklist, a user can ascend or descend results by the following columns:

- Company Name
- KCR# & Description
- KCR Status
- KCR UID
- Last Update Date
- Prime Location
- Surv. Category

To sort by ascending/descending, click the desired column header. This will automatically sort for the user.

#### KTR Details Worklist Results

- **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:** Select the “Click Here” hyperlink located under the “KTR Attachments”. This hyperlink opens to the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Plan.
- **KTR Status:** Displays the status of the Plan.
- **Last Action:** Description of the most recent change to the Plan. Possible actions are the same list as items saved to the History page.
- **Last Update Date:** The date the KTR Details were 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 is available – “Plan”.
- **View KTR:** Hyperlink that navigates to the view-only page of the KTR Details.

After displaying the worklist, a user can ascend or descend results by the following columns:

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

To sort by ascending/descending, click the desired column header. This will automatically sort for the user.

#### RECORD Worklist Results

- **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:** Based on the Assigned Functional Area selected, choose the KCR# & Description from the dropdown. The Surveillance Events data field will then populate based off this selection.
- **KCR UID:** Auto-populated, non-editable, 8-digit unique identifier of the KCR.
- **KTR Attachments:** Select the “Click Here” hyperlink located under the “KTR Attachments”. This hyperlink opens to the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Plan.
- **Last Update Date:** The date the record was last updated, based on the “Save” action.
- **Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **Record Attachments:** Select the “View Record Attachments” hyperlink located under the “Record Attachments”. This hyperlink opens to the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Plan. Please note, each Plan, Record and IDR has its own space for attachments. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.
- **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:** Unique identifier of an associated record of the KCR.
- **View Record:** Hyperlink that navigates to the view-only page of the Record.

After displaying the worklist, a user can ascend or descend results by the following columns:

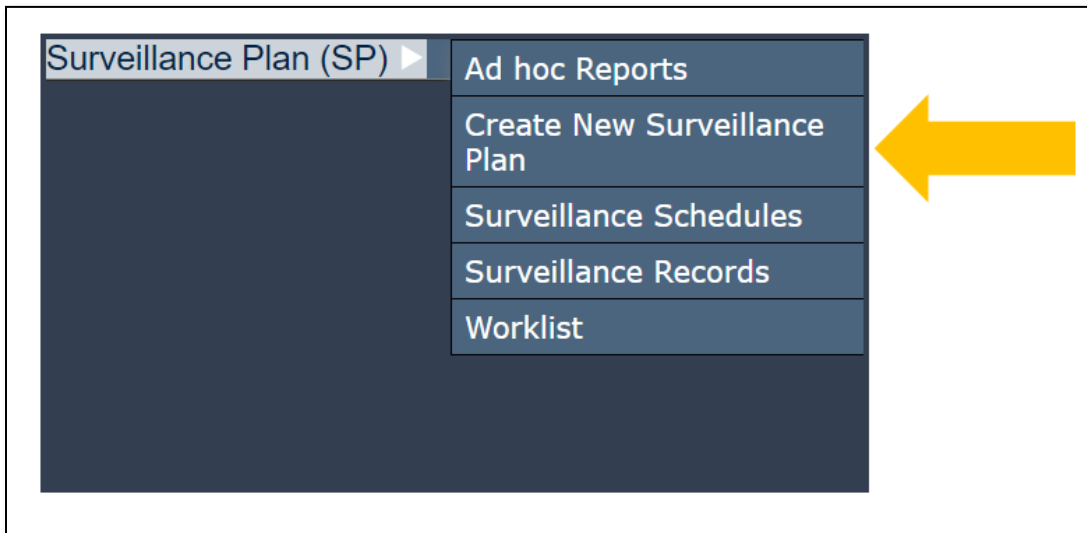
- Company Name
- KCR # & Description
- KCR UID
- Last Update Date
- Prime Location
- Record Status
- Record Type
- Record UID

To sort by ascending/descending, click the desired column header. This will automatically sort for the user.

### 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 inactive status. Once the SP has been archived, it may be reopened in the future if needed which then sets the Plan back to draft 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.

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

(M) Primary Location:

**Figure 3.2**

#### Associated Data Fields for **Figure 3.2**

- **(M) Primary Location:** Select the type of location from the provided dropdown 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 or the user’s account setting. For added items (such as Contract Data or End Items) to be saved to the database, the “Save” button must be utilized following those additions to the Surveillance Plan in such areas as:

1. Header & POC List (**Section 3.2.1**)
2. Contractor Data (**Section 3.2.2**)
3. Applicable Programs (**Section 3.2.3**)
4. Applicable Contracts (**Section 3.2.4**)
5. End Item & Product Characteristics (**Section 3.2.5**)

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



### 3.2.1 Header and KTR POC

After creating a Surveillance Plan, the first section (the header) contains basic data regarding the status of the Surveillance Plan and is auto filled. An example of this is in **Figure 3.3**.

The screenshot displays the 'Multi-Function Surveillance Plan' interface. At the top, there are three buttons: 'Save', 'Add/View Attachments', and 'Landing Page'. Below these, the 'Primary CAGE' is listed as 'PDREP - PDREP CO'. The 'Status' is 'Active' and the 'Date Surveillance Plan Last Updated' is '01/31/2024'. A section titled 'KTR POC List' contains several input fields: '(M) POC Name', '(M) POC Title', '(M) POC Phone Number', '(M) POC E-mail', and 'Functional Area' (a dropdown menu with '<SELECT>' selected). Below these fields are 'Add Contact' and 'Cancel Edits' buttons. At the bottom, there is a table with columns: Name, Title, Phone, E-mail, Functional Area, Edit, and Delete. The table is currently empty, with a message below it stating 'No POC data to display for KTR PDREP202301'.

**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.
  - **Draft:** A Plan that has been created but not yet activated.
- **(M) POC Name:** Field to enter the primary contractor 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.
- **(M) POC Email:** 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.

#### Associated Button Functionality for **Figure 3.3**

- **Add/View Attachments:** This button opens the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Plan being worked. Please note,

each Plan, Record and IDR has its own space for attachments. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.

- **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.

### KTR POC List for **Figure 3.3**

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 3.3a**)

**KTR POC List**

• POC/Contact mandatory data requirements have not been met. Provide all Mandatory data fields (M/CM).

(M) POC Name:

(M) POC Title:

(M) POC Phone Number:

(M) POC E-mail:

Functional Area: <SELECT> v

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

**Figure 3.3a**

After entering values and clicking “Add Contact”, the KTR POC information will display in the table below the entry fields (**Figure 3.3b**).

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

**KTR POC List**

(M) POC Name:

(M) POC Title:

(M) POC Phone Number:

(M) POC E-mail:

Functional Area: <SELECT> v

Name	Title	Phone	E-mail	Functional Area	Edit	Delete
POC Name	POC Title	5555555555	POCEmail@mail.mil	Aircraft Operations	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

**Figure 3.3b**

The Edit and Delete buttons seen in **Figure 3.3b** are only accessible to users on the same team as the user who added the KTR POC. If users are on a different team, the buttons will appear grayed out as seen in **Figure 3.3c**.

**KTR POC List**

(M) POC Name:

(M) POC Title:

(M) POC Phone Number:

(M) POC E-mail:

Functional Area:

Name	Title	Phone	E-mail	Functional Area	Edit	Delete
BOSS NAME	SUPERVISOR	1231231234	BOSS.NAME@MAIL.MIL	Contract Safety	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
POC NAME	POC TITLE	5555555555	POCEMAIL@MAIL.MIL	Aircraft Operations	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

**Figure 3.3c**

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 repopulate the entry in the KTR POC Table (**Figure 3.3d**). Click “Cancel Edits” to cancel or not save the updates on the KTR POC Table.

**KTR POC List**

(M) POC Name:

(M) POC Title:

(M) POC Phone Number:

(M) POC E-mail:

Functional Area:

**Figure 3.3d**

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

### 3.2.2 Contractor Data

The “Contractor Data” section of the Surveillance Plan allows the user to identify what business model the Prime Contractor 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 POCs are the users DCMA POCs at the sub-location. This information can be found in the CMT eTool.

**Figure 3.4**

Associated Data Fields for **Figure 3.4**

- **Business Model:** Dropdown list with options to record the business model of the primary undergoing surveillance (**Figure 3.5**).
- **(M) Primary Location:** Auto-populates based on the CAGE Code entered in the Primary Location field when initiating a new Surveillance Plan. There is only one Surveillance Plan per CAGE Code regardless of status.

**Figure 3.5**

- **Sub-Location:** A secondary CAGE Code (Prime Contractors supply stream) where surveillance is being performed.
- **Sub-Location Business Model:** Same list as the Primary Location business model (**Figure 3.5**) 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 POC associated with the Sub-Location.

The Sub-Location and at least one additional piece of information is needed to save the entry, 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 with the first successful use of the “Add Sub-Location” button. An example of this can be seen in **Figure 3.6**.

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

**Contractor Data**

(M) Primary Location: PDREP      Business Model: ACAT Prime

Sub-Location:       Lookup CAGE

Sub-Location POC:       Sub-Location Business Model: <SELECT>

Sub-Location Phone Number:       Sub-Location E-mail:

Add Sub-Location

Type	Sub-Location	Business Model	POC	Phone	E-mail	Delete
CAGE	81316	Manufacturer	TEST POC	555-555-5555	TESTEMAIL@TESTEMAIL.MIL	Delete

**Figure 3.6**

**Associated Button Functionality for Figure 3.6**

- **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:** 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.

**3.2.3 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 of the KTR is shown in **Figure 3.7**

**Applicable Programs**

Application Programs List: (Select all that apply - at least one is required.)

List: <SELECT>

Program Name: <SELECT>      Add Program

Program(s) Selected:

Remove Selected

Archive Selected

Unarchive Selected

**Figure 3.7**

Select an option in the first dropdown to identify the “List” type (DAI, NSEO, or PMBI). Subsequently the Programs associated with the initial selection will be loaded into the Program Name dropdown box. An example of this can be seen in **Figure 3.8**.

The screenshot shows a web interface titled "Applicable Programs". At the top, it says "Application Programs List:". Below this, there is a "List:" dropdown menu with "NSEO" selected. To the right of the dropdown is an "Add Program" button. Below the "List:" dropdown is a "Program Name:" dropdown menu with "NSEO-NASA" selected. To the right of this dropdown is another "Add Program" button. Below the "Program Name:" dropdown is a large, empty text area labeled "Program(s) Selected:". To the right of this text area are three buttons: "Remove Selected", "Archive Selected", and "Unarchive Selected".

Figure 3.8

After selecting the "Program Name", use the "Add Program" button to add the entry to the "Program(s) Selected" list box below as shown in **Figure 3.9**. **Figure 3.11** displays items added to the "Program(s) Selected" list box, including an example of an archived item.

The screenshot shows the same "Applicable Programs" interface. The "List:" dropdown menu still has "NSEO" selected. The "Program Name:" dropdown menu now has "<SELECT>" selected. The "Add Program" button is still present. The "Program(s) Selected:" text area now contains the text "NSEO-NASA". The "Remove Selected", "Archive Selected", and "Unarchive Selected" buttons are still present to the right of the text area.

Figure 3.9

Associated Data Fields for **Figure 3.9**

- **List:** Select one of the three "List" types from the provided dropdown. The page will query for the associated list of Programs within these lists.
  - 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 dropdown, 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. Contents within this box can be removed, archived, or unarchived by selecting the desired Program Name(s) and clicking on the corresponding action button.

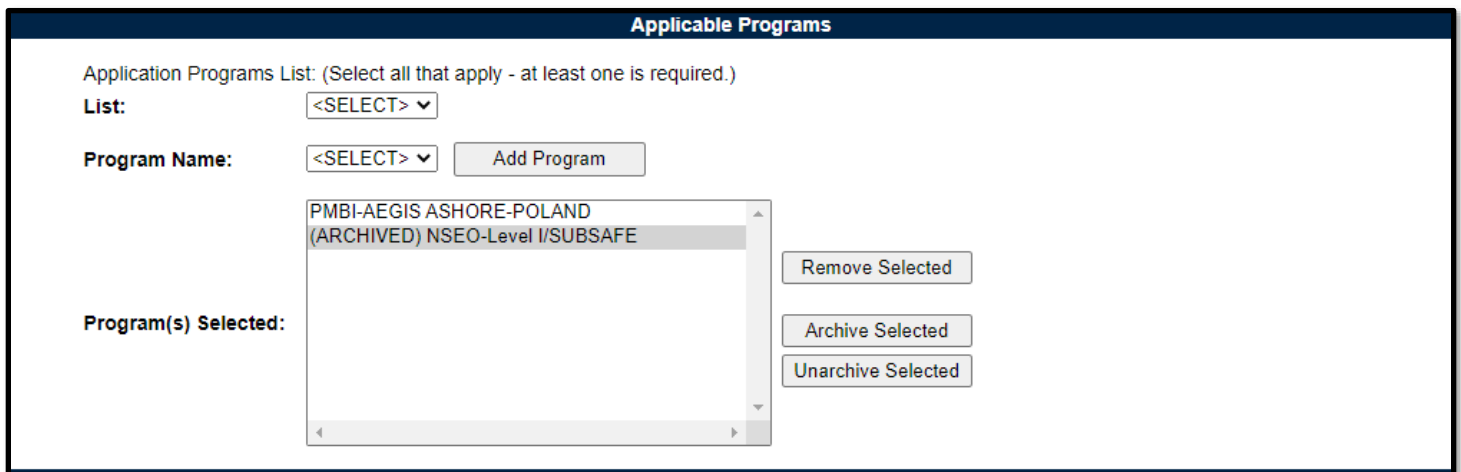
Associated Button Functionality for **Figure 3.9**

- **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 3.11**.
- **Remove Selections:** This button removes the selected Program Name (or multiple Program Names) 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 3.10** when attempted.

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

**Figure 3.10**

- **Unarchive Selected:** This button undoes the Archiving action described above.



**Figure 3.11**

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

### 3.2.4 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. Enter a contract number, associated dollar amount and select the “Add Contract” button to add it to the Contract(s) Selected list box below.

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

**Figure 3.12**

Associated Data Fields for **Figure 3.12**

- **Contract Amount (USD):** The value of the above contract in USD (optional) with a maximum value of 999999999.99 (12 characters total).
- **(M) Contract Number:** A contract associated with the contractor where DCMA has surveillance oversight.
- **Contract(s) Selected:** This box contains a list of the recorded Contracts. 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 3.12**

- **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 3.12**.
- **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 3.13** when attempted.

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

**Figure 3.13**

- **Unarchive Selected:** This button undoes the Archiving action described above.

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

### 3.2.5 End Item

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 contractor.



Enter the known information and select “Add Item” to add the entry to the Selected End Item(s) list box to the right of this section’s buttons (**Figure 3.14**).

If a NIIN is entered, a query to the database will be performed whereby the NIIN is checked against the Federal Logistics Information System (FLIS) dataset and a COG, FSC, SMIC and a Product/Service Description (if relevant) will be auto filled into those various boxes. Please note only NSNs present in the FLIS may be auto filled. If an End Item does not have a part number or NIIN, users can enter a Nomenclature in the part number box.

In the absence of a NSN, the Product/Service Description and one other End Item Identifier (Part Number/Unique Identifier or Serial Number) is required before the item can be added to the Selected End Item(s) list box.

To support Deliverable Product and Deliverable Service Evaluations, it is recommended 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.

The screenshot shows a web-based form titled "End Item NSN/Part/Serial Numbers". On the left side, there are four rows of input fields: "National Stock Number:" with four small boxes labeled "COG", "FSC", "NIIN", and "SMIC"; "Part Number/Unique Identifier:" with a single wide box; "Serial Number:" with a single wide box; and "Product/Service Description:" with a single wide box. To the right of these fields is a vertical column of six buttons: "Add Item", "Remove Selected", "Edit Selected", "Cancel Edits", "Archive Selected", and "Unarchive Selected". On the far right is a list box titled "Selected End Item(s):" which contains the text "DY4820123456789C1 ||| TEST TEST" and has a scroll bar.

**Figure 3.14**

#### Associated Data Fields for **Figure 3.14**

- **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.

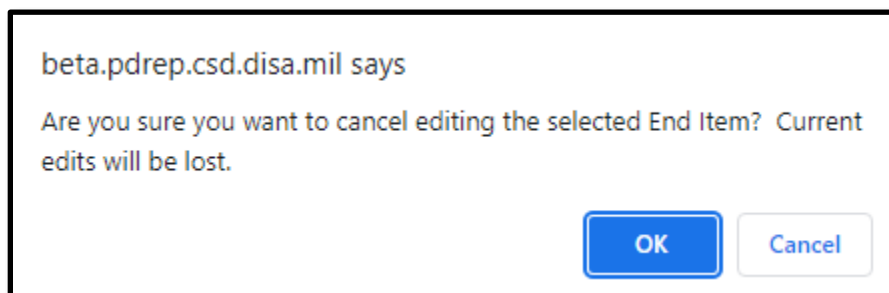
- **Part Number:** If known, enter the Part Number of the material. If an End Item does not have a Part Number or NIIN, users can enter a Nomenclature in the Part Number text box (*max of 75 characters*).
- **Product/Service Description:** Describes the product or service properties. This field will automatically populate based on the NIIN entered but may be edited if necessary (*max of 200 characters*).
- **Select End Item(s):** After entering the known information pertaining to the End Item, select the “Add Item” button to add the entry into the “Selected End Item(s)” box. Due to webpage size constraints, a horizontal scroll bar is provided in addition to the vertical scroll bar to view data within this box.
- **Serial Number:** If known, enter the Serial Number of the material (*max of 1,000 characters*).

#### Associated Button Functionality for **Figure 3.14**

- **Add Item:** Inserts the End Item and associated information into the “Selected End Item(s)” list box.
- **Edit Selected:** This button is enabled when an End Item is selected within the “Selected End Item(s)” list box and will open the editable version of the End Item selected. An example of this can be seen in **Figure 3.17**.
- **Remove Selected:** This button is enabled when an End Item is selected within the “Selected End Item(s)” list box and removes the End Item selected.
- **Update Item:** This button replaces the “Edit Selected” button when an End Item is in an editable state. When selected, the End Item is updated and returned to the Selected End Item(s) box.

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

- **Archive Selected:** This button sets the selected End Item(s) as “Archived” whereby it will send it to the bottom of the list and gray it out. An End Item cannot be removed if it is associated with a Record. User will receive the message shown in **Figure 3.16**.
- **Cancel Edits:** This button becomes useable only when editing a “Selected End Item”. When selected, a pop-up will displays asking the user if they want to continue with their action (**Figure 3.15**).
  - **OK:** Removes modifications to the End Item that have not be saved.
  - **Cancel:** Maintains the editable display.



**Figure 3.15**

- **Unarchive Selected:** Undoes the Archiving action described above.

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

- One or more selected **End Items** has been assigned to a Record and cannot be archived.

National Stock Number:      
COG FSC NIIN SMIC

Part Number/Unique Identifier:

Serial Number:

Product/Service Description:

**Selected End Item(s):**

PLANPART#1 | PLANSERIAL#1 | PLAN  
 1H4710009261179L1 | PART#2PLAN |  
 1H2590012753826L1 | PLAN3 PART# |

**Figure 3.16**

### 3.2.5.1 Product Characteristic(s)

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

### 3.2.5.2 Adding Product Characteristic(s)

To add Product Characteristic(s), select an End Item within the Selected End Item(s) list box and click the “Edit Selected” button. This will open the End Item to an editable state, with the five Product Characteristics populating beneath the three End Item Identifiers (Part Number/Unique Identifier, Serial Number, & Product/Service Description). An example of this can be seen in **Figure 3.17**.

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

National Stock Number:      
COG FSC NIIN SMIC

Part Number/Unique Identifier:

Serial Number:

Product/Service Description:

**Selected End Item(s):**

PLANPART#1 | PLANSERIAL#1 | PL  
 1H4710009261179L1 | PART#2PLAN |  
 1H2590012753826L1 | PLAN3 PART# |

(M) Product Characteristic:

(M) Description:

(M) Insp. Req.:

(M) Characteristic Classification:

(M) ESA Identified-CC:

Product Characteristics						
Product Characteristic	Description	Insp. Req.	Characteristic Classification	ESA Identified	Edit	Delete
Dimension	PLAN - DESC. PROD CHAR	Customer Mandatory	Critical	Yes	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

**Figure 3.17**

Use the dropdown to select the “(M) Product Characteristic” type. Next, fill in the “(M) Description” before selecting the “(M) Insp. Req.”, “(M) Characteristic Classification” and the “(M) ESA Identified-CC” via their perspective dropdowns. 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.

When finished, select the “Update Item” button to return the End Item to the Selected End Item(s) list box. Select the “Save” button (located at the top of the page) to preserve the entries.

**Note:** The Product Characteristics table is created with the first successful use of the “Add New Product Characteristics” button. An example of this can be seen in **Figure 3.17**.

#### Associated Data Fields for **Figure 3.17**

---

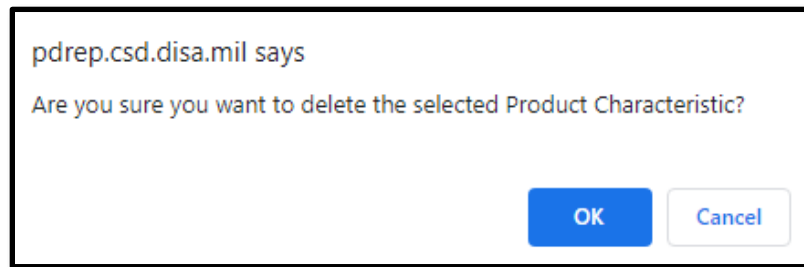
- **(M) Characteristic Classification:** Select one of the five Characteristic Classification types from the provided dropdown.
  - Critical
  - Major
  - Minor
  - N/A
  - Unknown
- **(M) Description:** An open text box with a maximum limit of 100 characters for entering the Description of the Product Characteristic.
- **(M) ESA Identified-CC:** Select one of the three ESA Identified-CC types from the provided dropdown.
  - N/A
  - No
  - Yes
- **(M) Insp. Req.:** Select one of the two Inspection Required types from the provided dropdown.
  - Customer Mandatory
  - DCMA Risk Based
- **(M) Product Characteristic:** Select one of the three Product Characteristic types from the provided dropdown.
  - 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 End Item.

#### Associated Button Functionality for **Figure 3.17**

---

- **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*) and applies them to the Product Characteristic table as one row (per 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:** When selected, a pop-up displays asking the user if they want to continue with this action as seen in **Figure 3.15**.
  - **OK:** Removes modifications to the End Item that have not be saved.

- **Cancel:** Maintains the editable display.
- **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 3.16**.
  - **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 display, allowing the user to edit the selected Product Characteristic.
- **Update Item:** Updates the End Item and returns the End Item back to the Selected End Item(s) list box.
  - **Update Product Characteristic:** Accessible only in an editable state, this button captures the changes to the Product Characteristic being edited. The “Update Product Characteristic” button must be used to apply the entry back to the table.
  - **Cancel (Product Characteristic):** Accessible only in an editable state, this button cancels any modifications to the Product Characteristic and returns the Product Characteristic back to the table unchanged.



**Figure 3.18**

### **3.2.5.3 Editing & Deleting Product Characteristic(s)**

Select an End Item within the Selected End Item(s) list box and click the “Edit Selected” button. This will open the End Item to an editable state, with the five Product Characteristics populating beneath the three End Item Identifiers (*Part Number/Unique Identifier, Serial Number, & Product/Service Description*) followed by the Product Characteristic Table. An example of this can be seen in **Figure 3.17**.

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

National Stock Number:      
COG FSC NIIN SMIC

Part Number/Unique Identifier:

Serial Number:

Product/Service Description:

(M) Product Characteristic:

(M) Description:

(M) Insp. Req.:

(M) Characteristic Classification:

(M) ESA Identified-CC:

**Selected End Item(s):**

1H4710009261179L1 | PART#2PLAN | ↕

1H2590012753826L1 | PLAN3 PART# | ↕

PLANPART#1 | PLANSERIAL#1 | PLA

Product Characteristics						
Product Characteristic	Description	Insp. Req.	Characteristic Classification	ESA Identified	Edit	Delete
Dimension	PLAN - DESC. PROD CHAR	Customer Mandatory	Critical	Yes	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

**Figure 3.19**

To edit a Product Characteristic, select the “Edit” button for the desired Product Characteristic to be edited. The contents of the Product Characteristic will fill their corresponding values above. An example of this may be seen in **Figure 3.19**. After making any necessary changes, select the “Update Product Characteristic” button to return the entry to the table or the “Cancel” button to return the entry back to the table unchanged.

To delete a Product Characteristic, select the “Delete” button aside the desired Product Characteristic. After confirming the action on the pop-up (**Figure 3.18**), the Product Characteristic will be eliminated from the table.

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

### 3.2.6 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 Supplier 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 3.20**.

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

SUPPLIER AUDITS & ASSESSMENTS (1 Year)									
Audit I.D. Number	DCMA Participated	Corrective Action Completed	Date Audited	Process(es)	Process Audit Date	Audit Result			
N39040-20230001	Y	YES	05/25/2023	HYDROSTATIC TESTING	05/25/2023	SATISFACTORY			
MATERIAL INSPECTION RECORD (1 Year)									
MIR #	Quantity Received	Quantity Rejected	Inspection Date						
N45112-23112312	1	1	08/22/2022						
N45112-21002122	10	3	08/31/2022						
N39040-22012003	1	0	01/12/2023						
N39040-23129004	10	10	05/09/2023						
N39040-23130002	10	10	05/10/2023						
N39040-23145001	1	0	05/25/2023						
N39040-23145002	1	1	05/25/2023						
CORRECTIVE ACTION REQUESTS (1 Year)									
CAR #	Level	Status	Prime Contractor CAGE	Contract Number	Transmitted Date				
PDREP-2022-111	LEVEL I	CLOSED - COMPLETED	PDREP		09/13/2022				
PDREP-2023-14	LEVEL I	CAP APPROVED	PDREP		05/04/2023				
PDREP-2022-95	LEVEL II	CLOSED - COMPLETED	PDREP		08/26/2022				
PDREP-2022-100	LEVEL II	CAR TRANSMITTED	PDREP		09/06/2022				
PDREP-2022-103	LEVEL II	CAR TRANSMITTED	PDREP		09/07/2022				
PDREP-2022-106	LEVEL II	CAR TRANSMITTED	PDREP		09/07/2022				
PDREP-2022-108	LEVEL II	CAR TRANSMITTED	PDREP		09/07/2022				
PDREP-2022-109	LEVEL II	CAR TRANSMITTED	PDREP		09/07/2022				
PDREP-2022-115	LEVEL II	CAP SUBMITTED	PDREP		11/03/2022				
PDREP-2023-5	LEVEL II	OASIS DCMA CLOSED	PDREP		01/20/2023				
PDREP-2022-113	LEVEL III	CLOSED - COMPLETED	PDREP		11/03/2022				
PDREP-2023-7	LEVEL III	OASIS DCMA CLOSED	PDREP		01/26/2023				
SURVEY DATA (1 Year)									
NO SURVEY RECORDS FOUND FOR THIS CAGE									
PRODUCT QUALITY DEFICIENCY REPORT (1 Year)									
RCN	Preparation Date	Category	Status	Critical	Contract #	Qty Received	Qty Deficient	Defect Responsibility	Closed Date
N45112-230010	05/25/2023	2	CORRECTED AND VERIFIED	N		1	1	PRIVATE CONTRACTOR	05/25/2023

**Figure 3.20**

### 3.2.6.1 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.

### 3.2.6.2 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.

### 3.2.6.3 Corrective Action Requests.

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

### 3.2.6.4 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.

### 3.2.6.5 Product Quality Deficiency Report

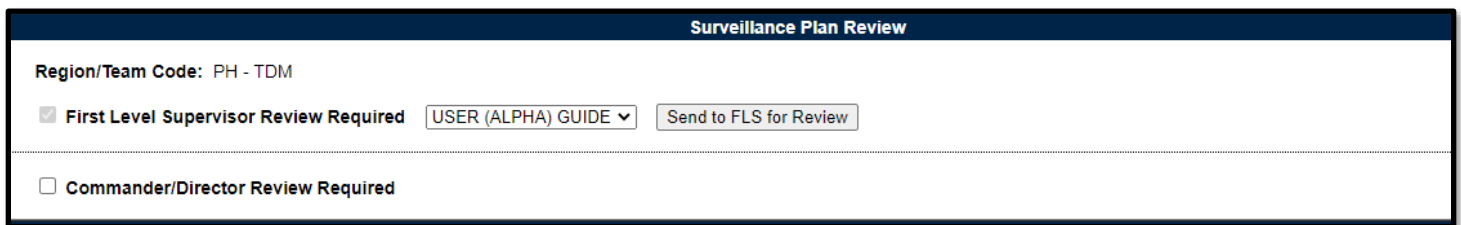
The Product Quality Deficiency Report (PQDR) dataset in the PDREP-AIS contains material deficiency data and is a process used to determine root cause, perform corrective actions and to prevent recurrence of material issues, as well as being the basis for requesting credit for deficient material. PQDRs 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.

### 3.2.7 Plan Review

Surveillance Plan Reviews can be performed by multiple teams but restricted to one team at a time. Users will also be limited to selections within their own Region and Team Code, regardless of module access rights. 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 First Level Supervisor Review is required.

#### 3.2.7.1 Initiating FLS Review

To initiate the review process, check the box for “First Level Supervisor Review Required” to populate a list of Supervisors within the same Region and Team Code. An example of the FLS Review display may be seen in **Figure 3.21**. When no name(s) are present within the dropdown, that signifies the Region & Team Code lacks a Supervisor with an active PDREP account.

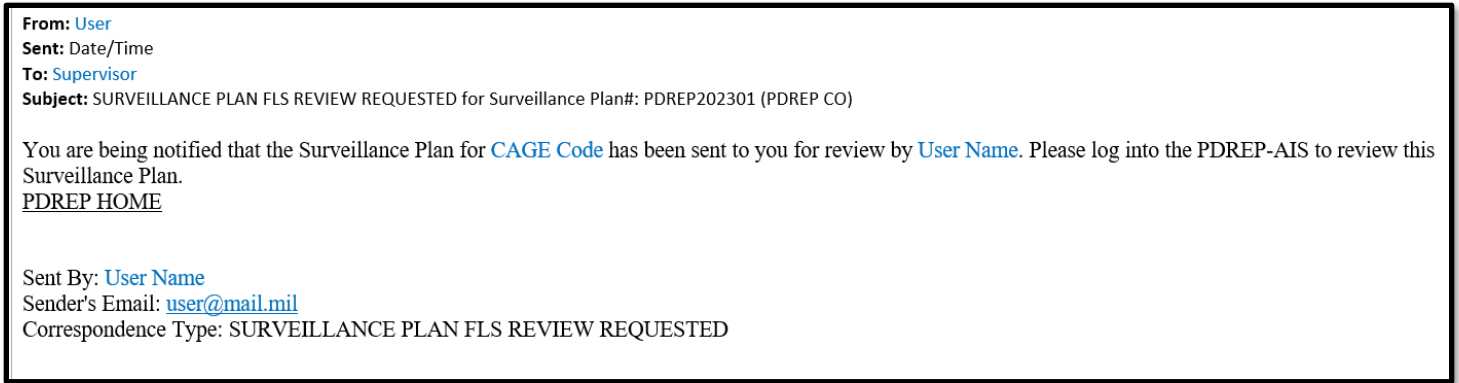


The screenshot shows a web interface titled "Surveillance Plan Review". At the top, it displays "Region/Team Code: PH - TDM". Below this, there is a checked checkbox labeled "First Level Supervisor Review Required". To the right of this checkbox is a dropdown menu currently showing "USER (ALPHA) GUIDE" and a button labeled "Send to FLS for Review". Below the first section, there is another unchecked checkbox labeled "Commander/Director Review Required".

**Figure 3.21**

After selecting from the provided dropdown, use the “Send to FLS for Review” button to generate an email notification to the selected Supervisor. An example of the email generated can be seen in **Figure 3.22**. Once the notification has been sent, users with Functional Specialist access are unable to take any further review action until the “First Level Supervisor Review Required” checkbox is removed by a higher access level.



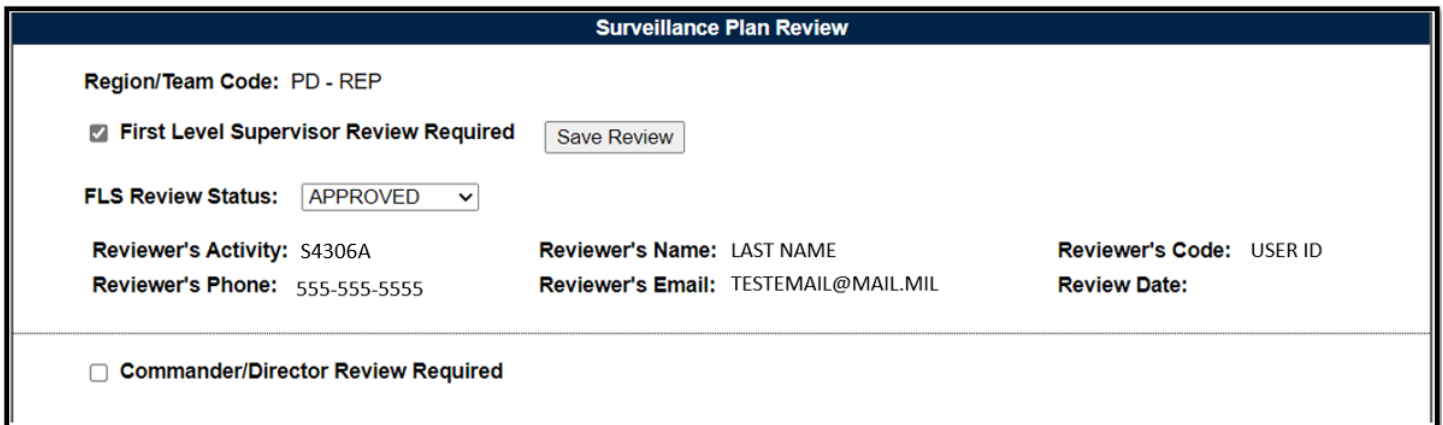


**Figure 3.22**

### 3.2.7.2 Making a Determination on FLS Review

Supervisors can approve a Plan, disapprove a Plan or initiate a Commander/Director Review. When a Supervisor is going to make a determination regarding a Plan’s status, they will begin by making their selection (*Approved/Disapproved*) from the “FLS Review Status” dropdown. After a selection is made, the page will refresh to one of two displays:

- **APPROVED** display, shown in **Figure 3.23**.
- **DISAPPROVED** display, shown in **Figure 3.24**.



**Figure 3.23**

Once the page refreshes for “Approved” Plans, select the “Save Review” button to capture the status, generate the action notification, and populate the six basic data values based on the action taken (below the dropdown). The auto-populated content pulls from the user profile and will display until a new review is submitted or the Plan is archived.

**Surveillance Plan Review**

**Region/Team Code:** PD - REP

**First Level Supervisor Review Required**

**FLS Review Status:** DISAPPROVED ▾

**Disapproval Comments (1000 chars max.):**

<b>Reviewer's Activity:</b> S4306A	<b>Reviewer's Name:</b> LAST NAME	<b>Reviewer's Code:</b> USER ID
<b>Reviewer's Phone:</b> 555-555-5555	<b>Reviewer's Email:</b> TESTEMAIL@MAIL.MIL	<b>Review Date:</b> 2024-01-31

**Commander/Director Review Required**

**Figure 3.24**

For “Disapproved” Plans, a text box will populate for the Supervisors Disapproval Comments. This is not a required field and has a max character limit of 1,000. Select the “Save Review” button to capture the status, generate the action notification, and populate the six basic data values based on the action taken (below the dropdown). The content displayed is auto populated and pulls from the user profile.

**Note:** Regardless of an Approved or Disapproved status, after the Review is completed, the Supervisor will need to remove the selection on the “First Level Supervisor Review Required” checkbox to allow for a new review cycle. A new review cannot be initiated until this checkbox is released.

### 3.2.7.3 Commander/Director Review

If an additional review is required past the First Level Supervisor, a FLS can select the “Commander/Director Review Required” check box to initiate this a CMO Review. This process is equivalent in functionality to the Supervisor Review process as described above, with the exception being that the email notification is sent to users of CMO Access on the same Team.

#### Associated Data Fields for **Figure 3.24**

- **Commander/Director Review Required:** Checkbox denoting that the associated review is required.
- **Commander/Director Review Status:**
  - Approved
  - Disapproved
- **First Level Supervisor Review Required:** Checkbox denoting that the associated review is required.
- **FLS Review Status:**
  - Approved
  - Disapproved
- **User Dropdown:** Dropdown box of users having Supervisor access.
- **Disapproval Comments:** Field to describe reasoning for SP Review disapproval.
- **Review Date:** Date the Review was performed.

- **Reviewer’s Activity:** DoDAAC of the Reviewer pulled from their user profile.
- **Reviewer’s Code:** User ID of the Reviewer pulled from their user profile.
- **Reviewer’s Email:** Email Address of the Reviewer pulled from their user profile.
- **Reviewer’s Name:** Name of the Reviewer pulled from their user profile.
- **Reviewer’s Phone:** Phone number of the Reviewer pulled from their user profile.

**Note:** Reviewer data fields and comments are relevant to both FLS and CMO Review.

Associated Button Functionality for **Figure 3.24**

---

- **Save Review:** Available to Supervisor users and saves the selected Review Status along with the reviewer’s information to the SP.
- **Send to FLS for Review:** Generates an email to the selected Supervisor notifying them that the SP is ready for their review.

### 3.2.8 Surveillance Plan Status

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

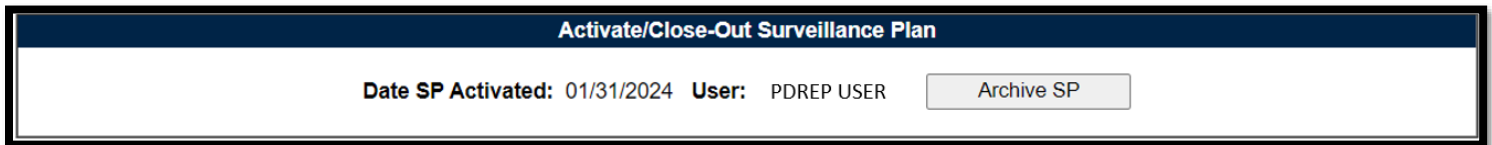
#### 3.2.8.1 Active Surveillance Plan

Active is the default status when creating a Surveillance Plan. Any user, from any Region or Team, can create and/or work on a draft Surveillance Plan. This preliminary status adheres to record locking restrictions. For more information on record locking, see **Section 4** of this document.

#### 3.2.8.2 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” (located at the bottom of the Plan). Archived Plans cannot be changed but subsequently can be re-opened if needed. Click on “Archive SP” to archive the Plan and set the SP to an “Inactive” status (**Figure 3.25**).

When a Plan is marked as “Archived”, the “Activate/Close-Out Surveillance Plan” section becomes “Reopen Surveillance Plan” and displays the date and user who archived the Plan. Archived Plans do not allow additional adding to or editing of the Plan’s information.



**Figure 3.25**

Associated Data Fields for **Figure 3.25**

---

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

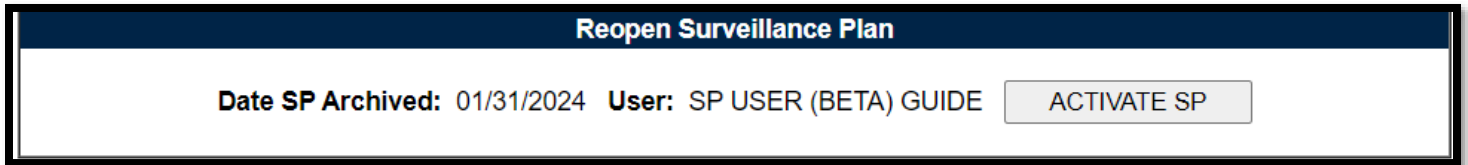
Associated Button Functionality for **Figure 3.25**

---

- **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.

#### 3.2.8.3 Activate Surveillance Plan

Though archived Surveillance Plans cannot be added to or edited, they can be reopened. To do this, click on the Landing Page’s “View KTR Details” navigational button. Scroll down to the bottom of the KTR Details page and select the “Activate SP” button to reopen the Plan. This action sets the SP back to a draft status. This action reopens all aspects of the Plan allowing for further editing and functionality.



**Figure 3.26**

Associated Data Fields for **Figure 3.26**

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

Associated Button Functionality for **Figure 3.26**

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

### 3.2.9 KTR Button Functionality

Buttons available on the Surveillance Plan “Multi-Function Surveillance Plan” main page (also known as the “KTR Details Page”) and their functionality are described below.

- **Save:** This button may be used at any time to save the contents of the page.

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

- **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.
  - Please note that each Plan, Record and IDR has its own space for attachments. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.
  - 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”.
- **Lookup:** 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 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					
<b>Instructions</b> 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 <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: PDREP					
<input type="button" value="Search"/> <input type="button" value="Cancel"/>					
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 3.27**

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 3.27**.

- **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 3.28**).
  - i. **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.
  - ii. **Back:** Returns the display to the previous page (returned results of Lookup CAGE Page).

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

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

Print Back

---

**PDREP - CAGE CODE**  
Date: 02/08/2024

**CAGE:** PDREP

**REPLACED BY:**

**COMPANY:** PDREP CO

**PO BOX:**

**ADDRESS:** NSLC PORTSMOUTH  
PORTSMOUTH, NH 03804

**PHONE NUMBER:**

**CAO:**

**CODES:**

**STATUS:**

**LAST UPDATED:**

**SMALL BUSINESS:**

**INDICATORS:**

**MANUFACTURER:**

**GOVERNMENT IND:** N

**Figure 3.28**

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 3.29**.

**Lookup CAGE**

**Instructions**

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

**Code FOR:** CAGE

**Code:**

**Name:** 33333

Search Cancel

No data found.

**Figure 3.29**

## 4 RECORD LOCKING

### 4.1 Engaging Record Locking

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

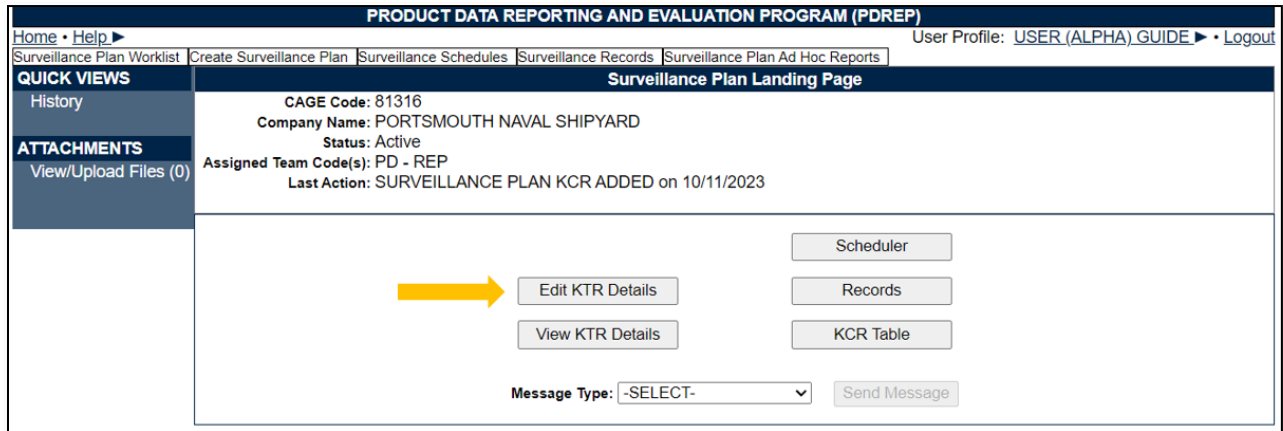


Figure 4.1

### 4.2 Locked SP Records

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

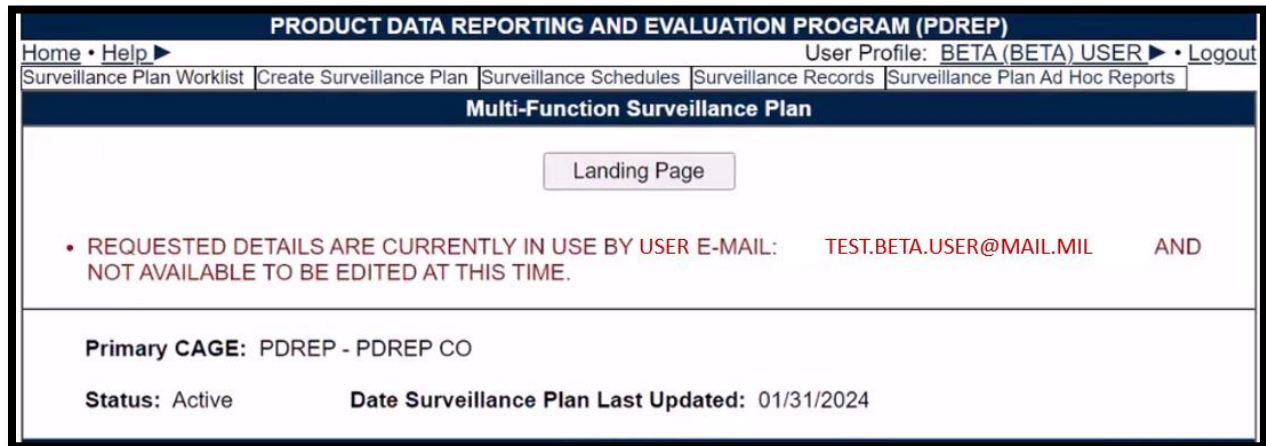
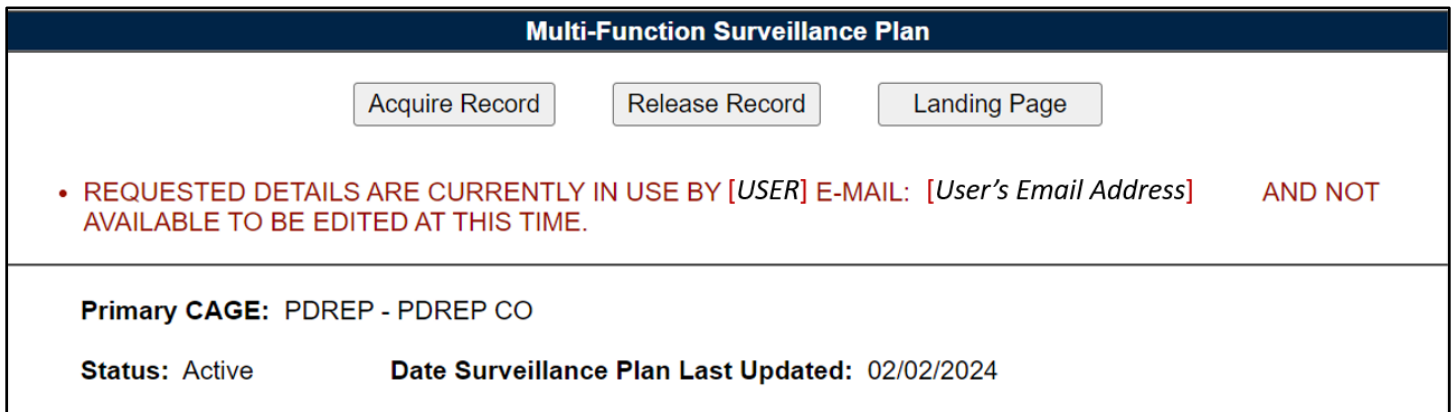


Figure 4.2

### 4.3 Acquiring/Releasing the KTR

Acquiring and Releasing the KTR is limited to those users with Supervisor or higher access. When such a user attempts to access the KTR Details page occupied by another user, a notification will

display indicating which user is working the page. Beneath the notification will be three functional buttons to “Acquire Record”, to “Release Record”, or to navigate to the “Landing Page” as shown in **Figure 4.3**.



**Figure 4.3**

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



**Figure 4.4**

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

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



**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.**

**Primary CAGE/UEI:** PDREP - NSLC PORTSMOUTH PDREP TEAM

**Status:** Draft      **Date Surveillance Plan Last Updated:** 06/20/2023

**Primary Location POC Name:**

**Primary Location POC Title:**

**Primary Location POC Email:**

**Primary Location POC Phone:**

**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**

←

**Primary CAGE:** 81316 - PORTSMOUTH NAVAL SHIPYARD

**Status:** Active      **Date Surveillance Plan Last Updated:** 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 'Surveillance Plan Landing Page' interface. At the top, there is a navigation bar with 'Home • Help' and 'User Profile: USER (ALPHA) GUIDE • Logout'. Below this is a breadcrumb trail: 'Surveillance Plan Worklist > Create Surveillance Plan > Surveillance Schedules > Surveillance Records > Surveillance Plan Ad Hoc Reports'. The main content area is titled 'Surveillance Plan Landing Page' and contains the following information:

- 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 information, there are several buttons and a message field:

- Scheduler** button
- Edit KTR Details** button
- View KTR Details** button
- Records** button
- KCR Table** button
- Message Type:** [-SELECT-] dropdown menu
- Send Message** button

At the bottom of the page, the version information is displayed: '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 dropdown 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**

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- **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 dropdown 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” dropdown. To access the “Send Message” page, select from the “Message Type” dropdown 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 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

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/>

Send Cancel

**Figure 5.2**

## 5.2.2 Creating a Correspondence

To initiate a correspondence, locate the “Message Type” dropdown on the Plan’s Landing Page (**Figure 5.3**) and make a selection 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 dropdown, the “Send Message” button will be enabled and no longer grayed out as shown in **Figure 5.3**. Click the “Send Message” button to initiates the creation of the correspondence and open the “Send Message” page.

**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

**Surveillance Plan Landing Page**

**QUICK VIEWS**  
History


**ATTACHMENTS**  
View/Upload Files (0)

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

Scheduler

Edit KTR Details      Records

View KTR Details      KCR Table

Message Type: Message To Supervisor ▼      Send Message 

**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** 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:

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 shows a web-based email composition interface. At the top, it displays 'CAGE Code: 81316'. Below this, a heading reads 'This correspondence will be sent to the following recipients'. The 'To:' field is empty, with an 'Add To Email: To List' button to its right. The 'Add Email to TO/CC:' section features a dropdown menu currently showing 'N45112 - NAVSEALOGCEN PORTSMOUTH NH'. Below the dropdown is a scrollable list of email addresses, with 'FIRST (ALPHA) LAST - anonymous@navy.mil' selected. There are 'Add TO Email' and 'Add CC Email' buttons below the list. The 'TO Email List:' section shows a dropdown menu with 'RANDOM (ALPHA) USER - randomuser@na' selected and a 'Remove' button to its right. The 'CC:' field is empty, with an 'Add CC Email: CC List' button to its right. The 'Subject:' field is 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 dropdown and making a new selection.

### 5.2.2.3 Message

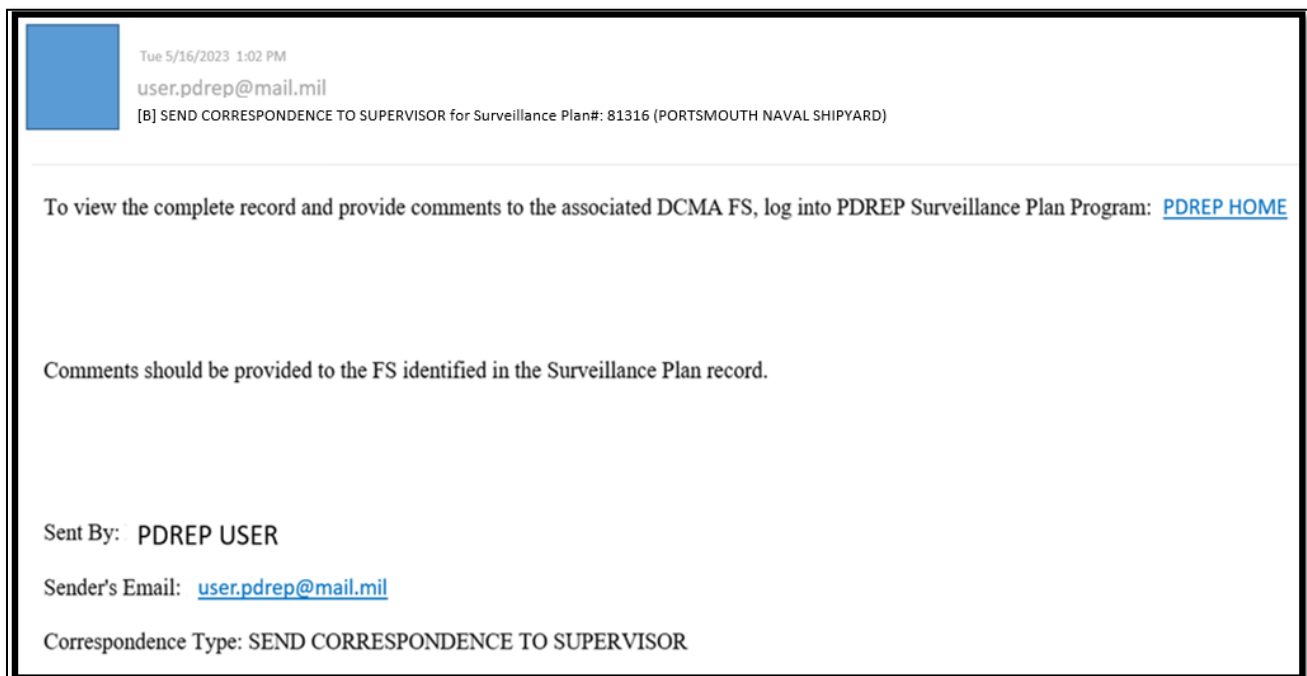
Regardless of the selected type, the body of the stock correspondence is the same for both the General Message and Send Correspondence to Supervisor (**Figure 5.7**).

**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.

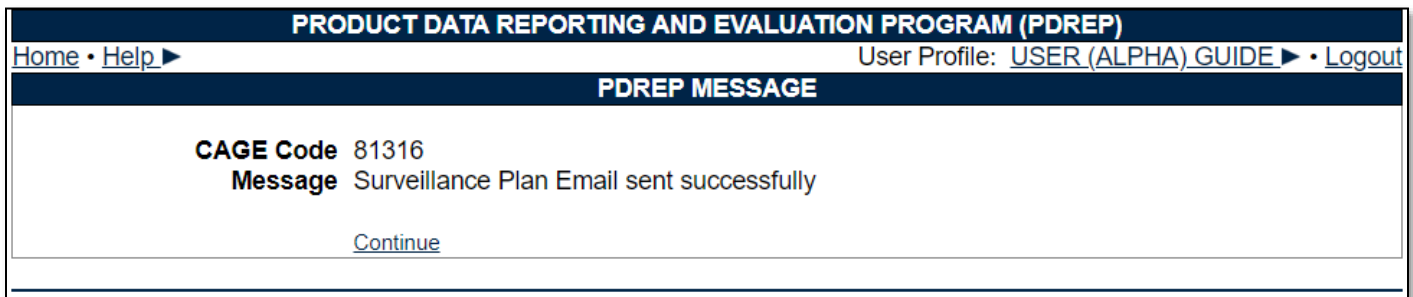
Associated Button Functionality for **Figure 5.7**

- **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
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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.

## 6 KEY CONTRACT REQUIREMENTS

Key Contract Requirements (KCR) of the Surveillance Plan, are used as an input to assess risk. Identified by function and based on risk, KCRs are contract requirements, that may drive surveillance events or activities. Key Contract Requirements contain details regarding specific dates and actions, as well as risk ratings for the Surveillance Events, Activities, and Sub-Activities associated with the Plan’s overall surveillance of a contractor.

**IMPORTANT NOTICE:** For questions regarding Key Contract Requirements, including but not limited to KCRs needing to be added to or removed from the table, questions regarding obsolete KCRs, questions related to workflow or process, please reach out to your DCMA PDREP POC and route the question to DCMA HQ through your chain of command as appropriate.

### 6.1 Key Contract Requirements Page

A principal component of the Surveillance Plan is the Key Contract Requirements (KCRs). Because of this, they are housed on their own page known as the “KCR Table”.

#### 6.1.1 Accessing the KCR Page

Access to the Plan’s Key Contract Requirements & subsequently the KCR Table can only be obtained through use of the Plan’s navigational buttons. The SP Landing Page, KTR Details Page, and the Plans Record Page contain the “KCR Table” button needed to access the Plan’s Key Contract Requirements. From one of the listed pages, select the “KCR Table” button to open the Key Contract Requirements Page as shown in **Figure 6.1**.

Key Contract Requirements (KCRs)												
Edit KTR Details		Scheduler		Records		Landing Page						
(M) Assigned Functional Area: <SELECT>							Select a Functional Area to begin creating a new KCR.					
Filter By: Functional Area: <SELECT>		Team Code: <SELECT>		Functional Specialist: <SELECT>		Surveillance Category: <SELECT>		Program: <SELECT>		Contract: <SELECT>		
Sort By: Risk Rating (Descending)		Apply		Reset		KCR Status: Active						
Surveillance Requirement					Risk Consequence			Risk		Risk Rating		
KCR UID	KCR# & Description	Event	Activity	Sub-Activity	Cost	Sched	Perf	Likelihood	Base	Curr	View	Edit
0013 7320	KCR-QA-0018-02 - 52.246-9085: Production Lot Testing (PLT) – Government	N/A	N/A	N/A	5	5	5	5	25	25	View	Edit
0013 7318	KCR-QA-0024 - Inspection Systems Requirement (Navy)	N/A	N/A	N/A		3	4	3	18	18	View	Edit
0013 7317	KCR-QA-0010 - Item Unique Identification and Valuation	N/A	N/A	N/A	1			1	1	1	View	Edit
0013 7319*	KCR-QA-0007 - First Article: (1) Government Test (2) Contractor Test	N/A	N/A	N/A		3	3	3	13	13	View	Edit

Figure 6.1

## 6.1.2 KCR Page Display

When the Key Contract Requirements Page opens, it opens to a default display of the navigational buttons at the top of the page followed by three distinct sections as displayed in **Figure 6.2**.

1. Creating a New KCR
2. Filtering KCRs
3. Associated KCR 's

The screenshot shows the top navigation bar with tabs: Surveillance Plan Worklist, Create Surveillance Plan, Surveillance Schedules, Surveillance Records, and Surveillance Plan Ad Hoc Reports. Below this is a dark blue header with the text "Key Contract Requirements (KCRs)". Underneath the header are four buttons: "Edit KTR Details", "Scheduler", "Records", and "Landing Page". Below the buttons is a dropdown menu labeled "(M) Assigned Functional Area:" with the text "<SELECT>" and a downward arrow. To the right of the dropdown is the text "Select a Functional Area to begin creating a new KCR."

**Figure 6.2**

## 6.2 Creating a New KCR

Located beneath the page's navigational buttons is the "(M) Assigned Functional Area" dropdown. To begin creating a new KCR, start by selecting a functional area from the dropdown (**Figure 6.3**). Once an Assigned Functional Area has been selected, the screen will refresh as it retrieves the KCR# & Description associated with the selected Functional Area (**Figure 6.4**).

**Note:** *KCR Descriptions, Events, Activities, and Sub-Activities are controlled by DCMA Headquarters. If there are options missing or otherwise need to be changed, please contact DCMA HQ. For additional information on KCRs, contact your DCMA chain of command.*

The screenshot shows the same interface as Figure 6.2, but with the "(M) Assigned Functional Area:" dropdown set to "Aircraft Operations". Below it, the "(M) KCR# & Description:" dropdown is open, showing a list of options. The first option is "<SELECT>". The second option is "KCR-AO-0001 - Ground and Flight Risk". The third option is "KCR-AO-0002 - Mishap Reporting and Investigation Involving Aircraft Missiles and Space Launch Vehicles". The fourth option is "KCR-AO-0005 - Contractor's Flight and Ground Operations". The fifth option is "KCR-AO-A001 - ECAR Service Set". The sixth option is "KCR-AO-A002 - Other Agency Accepted work requirements". To the left of the dropdown is a "Filter By:" section with labels: "Functional Area:", "Team Code:", "Functional Specialist:", and "Surveillance". Each label has a small "<S" icon and a dropdown arrow.

**Figure 6.3**

Once the desired KCR# & Description has been selected, the screen will refresh one more time to display the full KCR menu. Use **Figure 6.4a**, **Figure 6.4b** & **Figure 6.4c** to see the KCR in its entirety.

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

### Key Contract Requirements (KCRs)

(M) Assigned Functional Area:

(M) KCR# & Description:

(M) Other Agency Assigned Work Requirements:

Surveillance Event:

Surveillance Execution Info:

(M) Risk Consequence *(provide at least one)*

Risk Consequence – Cost:	<input type="text" value="&lt;SELECT&gt;"/>	(Auto) Risk Consequence:	<input type="text" value="(pending)"/>
Risk Consequence – Schedule:	<input type="text" value="&lt;SELECT&gt;"/>	(M) Risk Likelihood:	<input type="text" value="&lt;SELECT&gt;"/>
Risk Consequence – Performance:	<input type="text" value="&lt;SELECT&gt;"/>	(Auto) Risk Rating, Baseline:	<input type="text" value="(pending)"/>
		(Auto) Risk Rating, Current:	<input type="text" value="(pending)"/>

(CM) Rationale for Risk Consequence – Cost:

(CM) Rationale for Risk Consequence – Schedule:

(CM) Rationale for Risk Consequence – Performance:

(M) Rationale for Risk Likelihood:

(M) Surveillance Category:

(M) Frequency of Surveillance:

(M) Intensity of Surveillance:

Surveillance Location:

(M) Surveillance Warranted:  (CM)  Risk  Resource (CM) Unallocated Hours:

(M) Allocated Hours:

**Figure 6.4a**

(M) KCR Incoming from LOD/QALI:

(CM) LOD RCN:  (CM) LOD DCN:

(M) KCR will be delegated:

(M) Start Date:   (CM) End Date:   Surveillance Complete:

(CM) KTR Sub Location:

Applicable KCR Sub Location(s):

Contract Number:

Applicable Contract(s):

**Figure 6.4b**

The screenshot shows a web-based form for entering KCR data. It consists of several sections:

- Program Name:** A dropdown menu with "<SELECT>" as the current selection. To its right are two buttons: "Add Program" and "Add All".
- Applicable Program(s):** A large, empty list box with a vertical scrollbar. To its right is a "Remove Selected" button.
- Region:** A dropdown menu with "<SELECT>" as the current selection.
- Team Code:** A dropdown menu with "N/A" as the current selection.
- Functional Specialist:** A dropdown menu with "N/A" as the current selection. To its right is an "Add Specialist" button.
- (M) Assigned Functional Specialist(s):** A large, empty list box with a vertical scrollbar. To its right is a "Remove Selected" button.

At the bottom of the form are two buttons: "Add/Save KCR Record" and "Cancel KCR Edit".

**Figure 6.4c**

Working through the KCR, fill in all mandatory fields and select the “Add/Save KCR Record” button to save.

Once a KCR has been successfully saved, Assigned Functional Area, KCR# & Description, Other Agency Assigned Work Requirements, Surveillance Event, Surveillance Activity, Surveillance-Sub Activity, Surveillance Category, and Baseline Risk Rating cannot be changed.

The “Add/Save KCR Record” button captures the data, performs the save action, and adds the KCR to the KCR Table. As a default, the KCR table will show only active KCRs associated with the Plan and will display Warranted KCRs by descending order of overall Risk Rating before those KCRs marked as Not Warranted.

**Note:** For questions regarding KCRs, including but not limited to, KCRs needing to be added to or removed from the list or any questions regarding Obsolete KCRs, please reach out to your DCMA PDREP POC and route the question to DCMA HQ through your chain of command as appropriate.

Associated Data Fields for **Figure 6.4** (in order of appearance)

- **(M) Assigned Functional Area:**
  - i. Aircraft Operations
  - ii. Contract Safety
  - iii. Contracts
  - iv. Earned Value
  - v. Earned Value Analysis
  - vi. Engineering
  - vii. Manufacturing
  - viii. NASA Quality Assurance
  - ix. NSEO Quality Assurance
  - x. Packaging
  - xi. Plant Clearance

- xii. Property Administration
- xiii. Quality Assurance
- xiv. Small Business
- xv. Software Acquisition Management
- xvi. Transportation

- **(M) KCR# & Description:** Based on the Assigned Functional Area selected, choose the KCR# & Description from the dropdown. The Surveillance Events data field will then populate based off this selection.

**Note:** KCRs in the list are currently organized by “parent” functional area. KCRs considered “Need to Know for Awareness” may be selected from the functional area they are associated with directly.

- **(M) Frequency of Surveillance:** The Frequency of the Planned Surveillance. When a frequency of once is chosen, the End Date becomes mandatory.

Frequency of Surveillance	Duration
9 Months	Same numerical date 9 months later
Annually	Same numerical date 1 year later
Bi-monthly	Same numerical date 2 months later
Bi-weekly	14 calendar days later
Biennially	Same numerical date 2 years later
Daily	Occurring each workday (Monday thru Friday)
Monthly	Same numerical date 1 month later
Once	One occasion only
Quarterly	Same numerical date 3 months later
Semi-Annually	Same numerical date 6 months later
Triannually	Same numerical date 4 months later (3x year)
Triennially	Same numerical date 3 years later
Weekly	7 calendar days later

- **(M) Intensity of Surveillance:** The list of intensities determining the appropriate level of oversight of a contractor to meet contractual requirements.
  - 0.25% AQL (Critical) Tighten
  - 0.4% AQL (Critical)
  - 0.65% AQL (Complex/Critical) Tighten
  - 1.0% AQL (Complex Critical)
  - 1.5% AQL (Complex/Critical) Reduced
  - 100% Mandatory
  - 2.5% AQL (Non-complex/non-critical) Tighten
  - 4.0% AQL (Non-complex/non-critical)
  - 6.5% AQL (Non-complex/non-critical) Reduced
  - Full
  - Incremental
  - Partial

**Note:** Typically, i-ix describes intensity for DPEs, and x-xii describes type of PE.

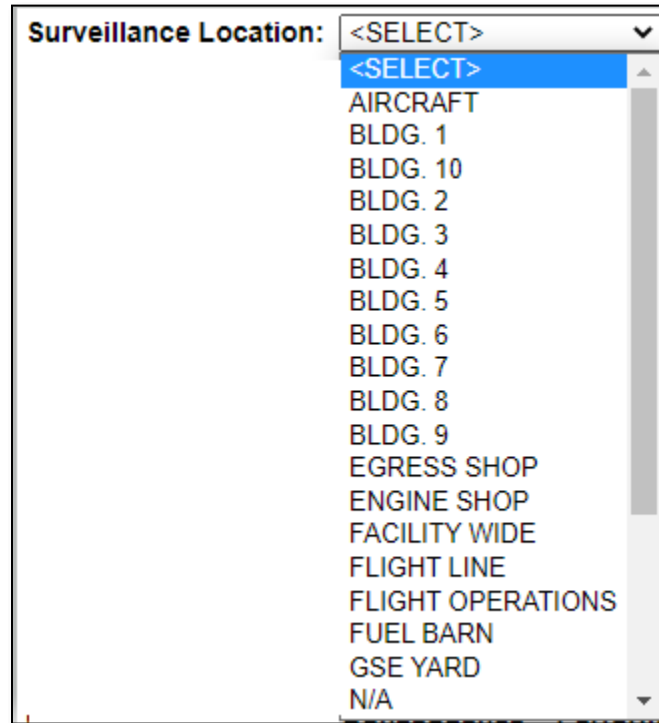
- **(M) Other Agency Assigned Work Requirements:** Describe the requirement in the provided box. Only available/applicable when a KCR ending in “A002” is selected (see **Figure 6.5**).

Figure 6.5

- **(CM) Rationale for Risk Consequence – Cost:** Required when a numeric 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.
- **(CM) Rationale for Risk Consequence – Performance:** Required when a numeric 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.
- **(CM) Rationale for Risk Consequence – Schedule:** Required when a numeric 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.
- **(M) 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”.
- **(M) Risk Consequence (provide at least one):**
  - **Risk Consequence – Cost:** Numeric 1-5 selection for lowest to highest risk.
  - **Risk Consequence – Schedule:** Numeric 1-5 selection for lowest to highest risk.
  - **Risk Consequence – Performance:** Numeric 1-5 selection for lowest to highest risk.
- **(Auto) Risk Consequence:** Takes the highest value from the Cost/Schedule/Performance Risk values to assign an overall Risk Consequence.
- **(M) Risk Likelihood:** Numeric 1-5 selection for lowest to highest risk.
- **(Auto) Risk Rating, Baseline:** Initial risk calculation using the risk table (see **Appendix 2** for the table used). Calculates by using at least one or up to three Risk Consequence(s) and the Risk Likelihood. This value is generated on the initial save action. Once established it will not change.
- **(Auto) Risk Rating, Current:** Most current risk calculation using a risk table (see **Appendix 2** for the table used). Calculates by using at least one or up to three Risk Consequence(s) and the Risk Likelihood. This value is generated on the initial save action and subsequently on any save action where there has been a change to risk.
- **Surveillance Activity:** Based on the Surveillance Event selected, choose Surveillance Activity from the dropdown. The Surveillance Sub-Activity data field may then populate if relevant to the selection.
- **(M) Surveillance Category:** Type of surveillance associated with the KCR. Select one of the four Surveillance Categories that matches the requirement.
  - i. Deliverable Product Evaluation (DPE)
  - ii. Deliverable Service Evaluation (DSE)
  - iii. System/Process Evaluation (SPE)
  - iv. Progress Evaluation (PE)



- **Surveillance Event:** Based on the KCR# & Description selected, choose the Surveillance Event from the dropdown. The Surveillance Activity data field may then populate if relevant to the selection.
- **Surveillance Execution Info:** A text box that allows the user to enter execution information for the surveillance.
- **Surveillance Sub-Activity:** Based on the Surveillance Activity selected, choose the Surveillance Sub-Activity from the dropdown.
- **Surveillance Location:** A dropdown list of physical locations where the surveillance is being performed. Use the scroll bar to view the entirety of the list (**Figure 6.6**).



**Figure 6.6**

- **(M) Surveillance Warranted:** Indicates if surveillance is to be performed on the selected KCR requirements. Default value is “Yes”. When Surveillance Warranted is changed from “No” to “Yes” a new Start Date is required. The new Start Date must be equal to or greater than the date the action is performed on. For example, if a user edits a KCR and changes Surveillance Warranted from “Yes” to “No” on 1 JAN 2024, the new Start Date must be 1 JAN 2024 or after.

If surveillance is Not Warranted:

- Additional data fields of Risk/Resource and Unallocated Hours will become mandatory.
- Draft Records will need to be closed or completed before the save action is allowed.
- Once saved, the KCR will not populate occurrences in the Scheduler.

**Note:** Regardless of the selection for “Surveillance Warranted”, all mandatory data fields (M/CM) are required prior to saving. FS will receive a warning at the top of the KCR edit area, when a mandatory data field has not been satisfied. An example of this is shown in **Figure 6.7**.

- Provide all Mandatory KCR data fields (M/CM) prior to saving KCR. Missing KCR values: Risk Likelihood, Rationale for Risk Likelihood, Rationale for Risk Consequence - Performance, KCR Specialist.

**Figure 6.7**

- **(M) Allocated Hours:** Recorded in two fields, this is the time Planned to complete one event (includes travel, preparation, and documentation). First field is related to hours and does not allow for negative hours or special characters. Second field is a dropdown related to minutes and defaults as “.00”.

Minute(s) dropdown values:

- .00 = On the hour
  - .25 = Quarter past the hour
  - .50 = Half past the hour
  - .75 = Quarter until the next hour
- **Applicable Contract Number(s):** Select from the list. The list is comprised of contracts added to the Surveillance Plan and pulls from the KTR Details page. The dropdown will be blank when a contract has not been applied to the Plan.
  - **Applicable Program(s):** Select from the list. The list is comprised of programs added to the Surveillance Plan and pulls from the KTR Details page. The dropdown will be blank when a program has not been applied to the Plan.
  - **(M) Assigned Functional Specialists:** This field is used to apply users who will be conducting the surveillance event/activity to the KCR. Select the Region for the desired user, followed by the “Team Code” and subsequently “Functional Specialist” from the dropdown. Click on the desired user and then the “Add Specialist” button to add them to the “(M) Assigned Functional Specialist(s)” list box.
    - Users with Team Lead or Functional Specialist access will have the Region & Team Code populate per their users’ profile.
    - Users with Supervisor or CMO access will have the ability to select Region and Team Code values from the provided dropdowns.
  - **(CM) End Date (optional):** The date the surveillance is planned to conclude.
  - **(M) KCR Incoming from LOD/QALI:** Yes/No selection indicating if the KCR registered from a LOD/QALI.
  - **(M) KCR will be delegated:** Yes/No selection indicating if the KCR Requirements will be delegated via a LOD.
  - **(CM) KTR Sub-Location(s):** Select from the list. The list is comprised of the Sub-Locations added to the Surveillance Plan and pulls from the KTR Details page. The dropdown will be blank when a Sub-Location has not been applied to the Plan.

**Note:** For KTR Sub Location/Contract/Program fields, these values must first be saved to the Surveillance Plan before they can be applied to a KCR.

- **(CM) LOD DCN:** A Document Control Number (DCN) is a unique tracking number associated with each QALI/LOD consisting of the DoDAAC, two-digit year, two-digit month and serial number.
- **(CM) LOD RCN:** A Record Control Number (RCN) is a unique tracking number associated with each QALI/LOD consisting of the DoDAAC, four-digit year and serial number.

- **(CM) CAGE Code:** CAGE Code associated with the entered QALI/LOD values.
- **(CM) Resource:** Resource constraint is the reason to support Surveillance Warranted as No.
- **(CM) Risk:** Risk Rating is low enough to support Surveillance Warranted as No.
- **(M) Start Date:** The date the surveillance evaluation is Planned to begin.
  - Mandatory with a Frequency of “Once”.
  - Mandatory when Surveillance Complete is “YES”.
  - When met, concludes KCR occurrences from further populating in the Scheduler.
- **Surveillance Complete:** Yes/No dropdown that indicates if the surveillance is complete. When “Yes”:
  - The user will need to enter an end date.
  - Draft Records will need to be closed or completed before the save action is allowed.
  - When successfully saved, concludes KCR occurrences from further populating in the Scheduler.
  - When successfully saved, KCR status changes from “Active” to “Inactive”.
- **(CM) Unallocated Hours:** The amount of time that has not been allocated to perform an event/activity due to Risk or Resource constraints.

When delegated is “Yes”:

- A minimum of one KTR Sub-Location must be entered. **Figure 6.8** shows the warning message that appears when a Sub-Location has not been applied.
- Once saved, the KCR will not populate occurrences in the Scheduler.

• A minimum of one KTR Sub-Location must be provided when KCR is delegated.

**Figure 6.8**

#### Associated Button Functionality for **Figure 6.4**

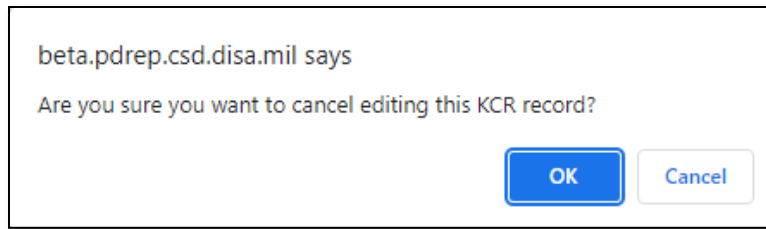
- **Add All:** Adds all values from the dropdown to the list box.
- **Add Location/Contract/Program:** Adds the selected value to the list box.
- **Add/Save KCR Record:** Saves and adds the KCR along with its associated data to the database. Successful saves will return the user to the Key Contract Requirements Page with a confirmation message of a successfully added KCR and its KCR UID (as shown in **Figure 6.9**). Unsuccessful saves will generate an error message indicating where the error occurred and what action needs to be taken.

**Note:** Once a KCR has been successfully saved it cannot be deleted.

KCR 0007 7266 was successfully added

**Figure 6.9**

- **Cancel KCR Edit:** Cancels any modifications to the KCR that have not be saved. When this button is used, a pop-up notification will display asking to confirm the request (**Figure 6.10**).
  - **OK:** Returns the user to the KCR page.
  - **Cancel:** Clears the request and maintains the editable KCR.



**Figure 6.10**

- **Remove Selected:** Removes the selected Location/Contract/Program from the list box.

## 6.3 KCR Rules

Key Contract Requirement have implemented rules to ensure success of the tool's functionality. Every KCR abides by the same set of rules regardless of user access or Plan status. These rules are necessary due to how information is captured and sourced within a Plan.

### 6.3.1 Assigned FS

Assigned Functional Specialist is a mandatory filed relating to an Assigned FS who will be conducting the surveillance.

Rules:

- A new start date is required when adding or removing an assigned FS from a KCR. The Start Date must be equal to or greater than the date the action is performed on.
- A functional special cannot be removed from a KCR if they have an in-progress occurrence (Draft Record) within the Scheduler. An error message will display at the top of the KCR notifying the user that the requested action cannot occur, as shown in **Figure 6.11**.



**Figure 6.11**

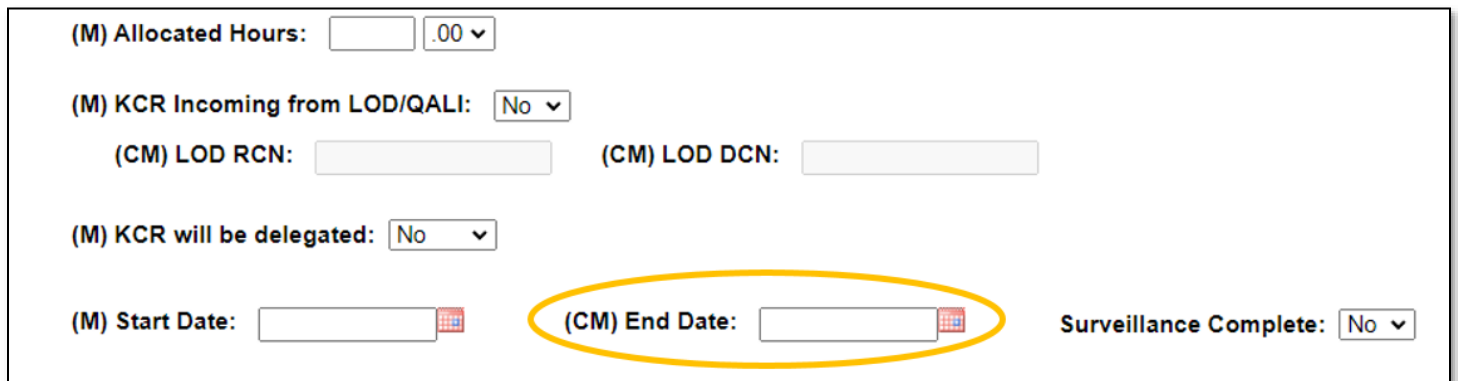
**Note:** To reassign a functional specialist from a KCR, a user must go in and edit the KCR.

### 6.3.2 End Date

The End Date of a KCR relates to the date the surveillance is planned to conclude on. This data element is generally optional within the KCR and determines when occurrences stop populating in the Scheduler (**Figure 6.12**).

Rules:

- Mandatory with a frequency of “Once”.
- Mandatory when “Surveillance Complete” is “Yes”.
- When met, concludes KCR occurrences from further populating in the Scheduler.
- When met and the KCR is still active, a pop-up notification will generate on the Key Contract Requirements Page. The notification will continue to populate each time the page is accessed until the KCR is inactivated (marked “Complete”) or the End Date is extended.



The screenshot shows a form with several fields. The field "(M) Allocated Hours:" has a text input and a dropdown menu with ".00" selected. The field "(M) KCR Incoming from LOD/QALI:" has a dropdown menu with "No" selected. The fields "(CM) LOD RCN:" and "(CM) LOD DCN:" are text inputs. The field "(M) KCR will be delegated:" has a dropdown menu with "No" selected. The field "(M) Start Date:" is a date picker. The field "(CM) End Date:" is a date picker and is circled in yellow. The field "Surveillance Complete:" has a dropdown menu with "No" selected.

Figure 6.12

### 6.3.3 Fixed Data Fields

Once a KCR has been successfully saved, Assigned Functional Area, KCR# & Description, Other Agency Assigned Work Requirements, Surveillance Event, Surveillance Activity, Surveillance Sub Activity, Surveillance Category, and Baseline Risk Rating cannot be changed (**Figure 6.13**).

Fixed Data Fields:

- Assigned Functional Area
- KCR# & Description
- KCR UID (issued on the save action)
- Surveillance Activity
- Surveillance Category
- Surveillance Event
- Surveillance Sub-Activity
- Text Field associated with A002 (Other Agency Accepted Work Requirements, **Figure 6.14**).

**KCR UID:** 0007 7125

**(M) Assigned Functional Area:** Quality Assurance  
**(M) KCR# & Description:** KCR-QA-0001 - Critical Item  
**Surveillance Event:** Critical Manufacturing Process (CMP)  
**Surveillance Activity:** Anodize  
**Surveillance Sub-Activity:** N/A

**Surveillance Execution Info:**

**(M) Surveillance Warranted:** Yes  **Surveillance Complete:**

**(M) Surveillance Category:** Deliverable Product Evaluation  **(M) Frequency of Surveillance:** Monthly

**Figure 6.13**

**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

**Key Contract Requirements (KCRs)**

Add/Save KCR Record      Cancel KCR Edit

**(M) Assigned Functional Area:** Aircraft Operations

**(M) KCR# & Description:** KCR-AO-A002 - Other Agency Accepted work requirements

**(M) Other Agency Assigned Work Requirements:**

**Surveillance Event:** <SELECT>

**Surveillance Execution Info:**

**Figure 6.14**

### 6.3.4 Frequency

The frequency of the planned surveillance relates to how often the surveillance will be performed and subsequently how often it will populate in the Scheduler (**Figure 6.15**). Rules:

- i. A new “Start Date” is required with a change in frequency.
- ii. When a frequency of once is chosen, the end date becomes mandatory.

(M) Surveillance Category: <SELECT>	(M) Frequency of Surveillance: <SELECT>
(M) Intensity of Surveillance: <SELECT>	Surveillance Location: <SELECT>
(M) Surveillance Warranted: Yes	(CM) <input type="radio"/> Risk <input type="radio"/> Resource
(M) Allocated Hours: <input type="text"/> .00	(CM) Unallocated Hours: <input type="text"/>
(M) KCR Incoming from LOD/QALI: No	
(CM) LOD RCN: <input type="text"/>	(CM) LOD DCN: <input type="text"/>
(M) KCR will be delegated: No	
(M) Start Date: <input type="text"/>	(CM) End Date: <input type="text"/> Surveillance Complete: No

Figure 6.15

### 6.3.5 KCR Incoming from LOD/QALI

The KCR Incoming from LOD/QALI field indicates whether the KCR is registered from a LOD/QALI (Figure 6.16). Fields become active when YES is selected in the KCR Incoming from LOD/QALI dropdown. Rules:

- i. An active LOD RCN or an active LOD DCN must be entered (either or).
  - a. The following statuses **allow** an LOD RCN and LOD DCN to be added on a KCR:
    - i. Accepted
    - ii. Acknowledged
    - iii. Completed
    - iv. Issued
    - v. Rejected
  - b. The following statuses **do not allow** an LOD RCN and LOD DCN to be added on a KCR:
    - i. Closed
    - ii. CMO Draft
    - iii. Draft
    - iv. Withdrawn
- ii. When both are used (active LOD RCN & LOD DCN), they must match to the same LOD/QALI.
- iii. CAGE Code of the LOD may be entered.

(M) Surveillance Warranted:  (CM)  Risk  Resource (CM) Unallocated Hours:  .00

(CM) Allocated Hours:  .00

(M) KCR Incoming from LOD/QALI:

(CM) LOD RCN:  (CM) LOD DCN:  (CM) CAGE code:

(M) KCR will be delegated:

(M) Start Date:  (CM) End Date:  Surveillance Complete:

Figure 6.16

### 6.3.6 KCR will be Delegated

The “KCR will be Delegated” field indicates if the KCR Requirements will be delegated to a LOD (Figure 6.17). Rules:

- i. A KTR Sub Location must be applied when the KCR is delegated (“Yes”).
- ii. Delegated KCRs & KCRs identified as RGQA will not populate occurrences in the Scheduler.

(M) Surveillance Category:  (M) Frequency of Surveillance:

(M) Intensity of Surveillance:  Surveillance Location:

(M) Surveillance Warranted:  (CM)  Risk  Resource (CM) Unallocated Hours:  .00

(M) Allocated Hours:  .00

(M) KCR Incoming from LOD/QALI:

(CM) LOD RCN:  (CM) LOD DCN:

(M) KCR will be delegated:

(M) Start Date:  (CM) End Date:  Surveillance Complete:

Figure 6.17

### 6.3.7 Start Date

The date the surveillance evaluation is planned to begin is known as the “Start Date”. This field also distinguishes when occurrences will begin populating in the Scheduler (Figure 6.18).

- i. When a KCR status is changed from Inactive to Active, a new start date is required.
- ii. Changes in “Frequency of Surveillance” requires a new start date.
- iii. When a KCR changes from “Not Warranted” to “Warranted”, a new start date must be entered.
- iv. A new start date is required whenever an Assigned FS is added or removed.



(M) Allocated Hours:  .00 ▾

(M) KCR Incoming from LOD/QALI: No ▾

(CM) LOD RCN:  (CM) LOD DCN:

(M) KCR will be delegated: No ▾

(M) Start Date:  (CM) End Date:  Surveillance Complete: No ▾

Figure 6.18

### 6.3.8 Surveillance Complete

The “Surveillance Complete” field indicates if the surveillance is Active (Complete) or Inactive (**Figure 6.19**). Rules:

- i. A new “Start Date” is required with a change in frequency.
- ii. When the “Surveillance Complete” is marked “Yes”, an “End Date” is required (**Figure 6.19**).
- iii. If the KCR is marked complete, the KCR status becomes “Inactive”.
- iv. The KCR cannot be edited while in an inactive status.
- v. Inactive KCRs are hidden on the KCR Worklist. This is due to the “Active” default view. Inactive KCRs will again populate in the table when “Any” is used as the display status.
- vi. Inactive KCRs do not populate in the Scheduler.
- vii. When the “Surveillance Complete” goes from being “Yes” to “No” (*Inactive to Active*), a new start date is required.
- viii. Only active KCRs will populate in the Scheduler.

(M) KCR Incoming from LOD/QALI: No ▾

(CM) LOD RCN:  (CM) LOD DCN:

(M) KCR will be delegated: No ▾

(M) Start Date:  (CM) End Date:  Surveillance Complete: Yes ▾  
 Yes  
 No

(CM) KTR Sub Location: <SELECT> ▾ Add Location Add All

Applicable KCR Sub Location(s):  Remove Selected

Figure 6.19

### 6.3.9 Surveillance Warranted

The “Surveillance Warranted” field indicates if surveillance is to be performed on the selected KCR (**Figure 6.20**). Rules:

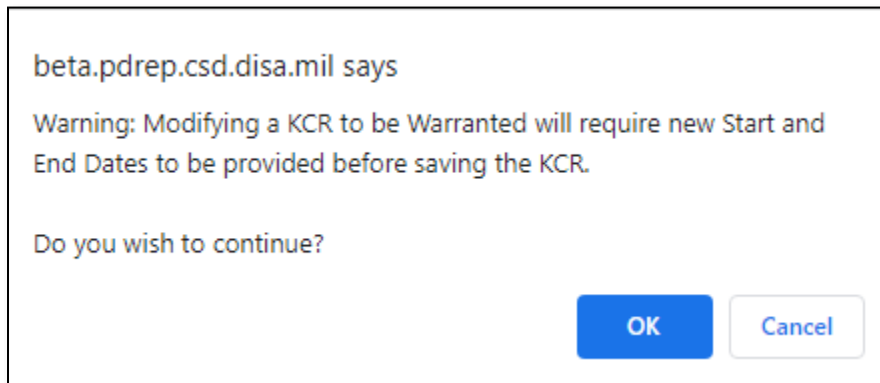
- i. If the KCR goes from “Not Warranted” to “Warranted”, a new start date is required (**Figure 6.21**).

- ii. When surveillance is Not Warranted (“No”), a basis of either “Risk” or “Resource” must be selected.
  - a. When “Resource” is determined as the basis for why surveillance is Not Warranted, Unallocated Hours must be entered.
- iii. KCRs where surveillance is Not Warranted do not populate in the Scheduler.
- iv. KCRs identified as Not Warranted will have an asterisk (\*) following their UID number on the KCR Table.
- v. The KCR Table will display Warranted KCRs before KCRs Not Warranted.

The screenshot shows a form with the following fields:

- (M) Surveillance Category: <SELECT>
- (M) Frequency of Surveillance: <SELECT>
- (M) Intensity of Surveillance: <SELECT>
- Surveillance Location: <SELECT>
- (M) Surveillance Warranted: No (selected), Yes
- (CM) Risk (radio button), Resource (radio button)
- (CM) Unallocated Hours: [ ] .00
- (M) Allocated Hours: [ ]
- (M) KCR Incoming from LOD/QALI: No
- (CM) LOD RCN: [ ]
- (CM) LOD DCN: [ ]

**Figure 6.20**



**Figure 6.21**

## 7 KCR Table

Saved KCRs are displayed in a table beneath the area in which KCRs are filtered. This display has a default view of active KCRs. Inactive KCRs will display when “Any” or “Inactive” is selected as a filter Status.

Risk Consequence columns of Cost, Schedule, Performance, and Likelihood update immediately following the save action.

The Current Risk Rating and the Baseline Risk Rating of a KCR is displayed with a red, yellow, or green box color based on the 5x5 Risk Matrix (**Appendix 2**). The color box of the Baseline Risk Rating will never change. However, the color box of a Current Risk Rating may differ from that of the Baseline Risk Rating if updates were made to the KCR Risk Rating in reassessment. An example of this can be seen in **Figure 7.1**.

If a KCR is noted as Surveillance Not Warranted, the KCR will have an asterisk placed to the end of its KCR UID (number) and will be moved to the bottom of the KCR list. Warranted KCRs are displayed before those KCRs indicated as Not Warranted and both are displayed in descending order of Current Risk Rating (**Figure 7.1**).

Filter By:		Functional Area:	<SELECT>	Program:	<SELECT>							
		Team Code:	<SELECT>	Contract:	<SELECT>							
		Functional Specialist:	<SELECT>	KCR Status:	Active							
		Surveil. Category:	<SELECT>									
Sort By:		Risk Rating (Descending)		Apply	Reset							
Surveillance Requirement				Risk Consequence		Risk		Risk Rating				
KCR UID	KCR# & Description	Event	Activity	Sub-Activity	Cost	Sched	Perf	Likelihood	Base	Curr	View	Edit
0007 7827	KCR-QA-0018 - Production Lot: (1) Government Test (2) Contractor Test	N/A	N/A	N/A	4			4	13	21	View	Edit
0007 7828	KCR-QA-0025 - Allied Quality Assurance Publications (AQAP)	N/A	N/A	N/A	4			4	21	21	View	Edit
0007 7907	KCR-AO-0001 - Ground and Flight Risk	N/A	N/A	N/A	3			4	1	17	View	Edit
0007 7908	KCR-EN-0016-03 - Configuration Change Management	Configuration Change Management	Engineering Change Proposal	N/A		3		3	13	13	View	Edit
0007 7285	KCR-CS-0002 - Arms, Ammunition & Explosives	Ammunition & Explosives	DFARS 252.223-7002 - Safety Precautions for Ammunition and Explosives	Mishaps	2			2	1	5	View	Edit
0007 7166*	KCR-AQ-0004 - 252.216-7004: Cost Plus Award Fee	N/A	N/A	N/A	1			1	1	1	View	Edit

**Figure 7.1**

The “Reset” button clears the returned KCR Table back to its default view. Tables returned with applied “Sort By” or “Filters” will maintain their display until the table is reset, a new query is run, or the page is exited.

**Associated Data Fields for Figure 7.1**

- **Activity:** The Activity associated with the KCR. Field will display as “N/A” when lacking a Surveillance Activity in the KCR.
- **Baseline Risk Rating:** Displays the initial Risk Rating calculated for the KCR. This number is displayed with a red, yellow, or green colored box based on the 5x5 Risk Matrix (see **Appendix 2**). Both the number and associated risk color will never change.
- **Current Risk Rating:** The most current Risk Rating calculated for the KCR. This number is displayed with a red, yellow, or green colored box based on the 5x5 Risk Matrix (see **Appendix 2**). Both the number and associated risk color will display as the KCRs current values indicate and may differ from that of the Baseline Risk Rating.

- **Event:** The Event associated with the KCR. Field will display as “N/A” when lacking a Surveillance Event in the KCR.
- **KCR UID:** Auto-populated, non-editable, 8-digit unique identifier of the KCR.
- **KCR# & Description:** Key Contract Number & Description of the KCR.
- **Risk Consequence:**
  - **Cost:** Displays the KCRs present value for Risk Consequence related to Cost.
  - **Schedule:** Displays the KCRs present value for Risk Consequence related to the schedule.
  - **Performance:** Displays the KCRs present value for Risk Consequence related to performance.
- **Risk Likelihood:** Displays the number associated with the Risk Likelihood of the KCR.
- **Sub-Activity:** The Sub-Activity associated with the KCR. This field will display as “N/A” when lacking a Surveillance Sub-Activity in the KCR.

Though multiple users can work on the KCR Table page together/at the same time, record locking is still applicable at the KCR level. If a user is performing edits to a Key Contract Requirement, their User ID and Email Address will be displayed to additional users who attempt to open the KCR while it’s in use. This is done so additional users know whom to contact if editing capabilities are immediately needed and may coordinate accordingly (see **Figure 7.2** for an example of this message).

• THIS RECORD IS CURRENTLY IN USE BY [User ID] E-MAIL: [E-Mail Address] AND IS NOT AVAILABLE TO BE EDITED AT THIS TIME.

**Figure 7.2**

## 7.1 Editing a KCR

To modify an existing KCR, select the “Edit” button for the row that correlates with the KCR to be edited. The associated data will be loaded into a view like that of adding a new KCR (**Figures 6.4A, 6.4B and 6.4C**) as described in **Section 6**. Once changes have been made, select the “Update/Save KCR Record” to capture the change and record the previous value to the History page. A new start date is required for occurrences of “Once” and when editing Surveillance Warranted, Surveillance (no longer) Complete or adding/removing an Assigned FS. If a start date has not been updated, the page will show an error message notifying the user of the field needing attention (**Figure 7.2a**).

• Start Date must be equal to or before today's date  
 • All **Records** must be marked Complete to save this KCR as Delegated.

KCR UID: 0007 7493

**Figure 7.2a**

## 7.2 Reactivating a KCR

If a KCR needs to be reactivated, select the “Edit” button for the intended KCR on the KCR Table (**Figure 7.3**).

Key Contract Requirements (KCRs)												
Edit KTR Details		Scheduler		Records		Landing Page						
(M) Assigned Functional Area: <SELECT>								Select a Functional Area to begin creating a new KCR.				
Filter By: Functional Area: <SELECT>		Team Code: <SELECT>		Functional Specialist: <SELECT>		Surveil. Category: <SELECT>		Program: <SELECT>		Contract: <SELECT>		
KCR Status: Active		Sort By: Risk Rating (Descending)		Apply		Reset						
Surveillance Requirement					Risk Consequence			Risk Rating				
KCR UID	KCR# & Description	Event	Activity	Sub-Activity	Cost	Sched	Perf	Likelihood	Base	Curr	View	Edit
0016 8070	KCR-QA-0010 - Item Unique Identification and Valuation	Fabrication/Procurement	Labeling	N/A	5			5	25	25	View	Edit
0016 8161	KCR-QA-0022 - Specialty Metals	Other Event User Defined	N/A	N/A	1		5	3	22	22	View	Edit
0016 8077	KCR-TO-0002 - Transportation Account Code	Documentation	Missing financial transportation information	N/A	4			3	18	18	View	Edit
0017 1199	KCR-TO-0001 - FOB Origin	N/A	N/A	N/A	4			3	18	18	View	Edit
0016 8072	KCR-QA-A002 - Other Agency Accepted work requirements	Delivery	N/A	N/A	1			1	1	1	View	Edit

Figure 7.3

After the page refresh, the warning message shown in Figure 7.4 will be displayed.

- **OK:** Clears the pop-up as well as some fields within the KCR (such as Start date, Assigned FS, etc.).
- **Cancel:** Will discard any modifications to the KCR that had not be previously saved.

**beta.pdrep.csd.disa.mil says**

Warning: Reactivating a KCR will clear data within multiple fields. User will need to provide new input for the mandatory fields. This information will be used to reestablish the scheduler.

Do you wish to continue?

Figure 7.4

To reactivate a KCR, the KCR will need to have certain parameters re-established (i.e. mandatory data fields of the KCR e.g. Intensity of Surveillance, Frequency of Surveillance, Start Date etc.). The

“Update/Save KCR Record” button will be used to capture the change and display a confirmation the KCR had been successfully modified as shown in **Figure 7.5**.



**Figure 7.5**

Active KCRs are subject to record locking. Record locking was instituted to prevent users from saving over each other’s work. Only one user is allowed to be actively working in the KCR at a time. To engage the lock on a particular KCR, select the “Edit” button on the KCR Table with that of the correlating KCR. Additional users attempting to edit the same KCR will be met with a read only view and a notification of the user with current editing rights. An example of this can be seen in **Figure 7.6**.

**Key Contract Requirements (KCRs)**

- KTR DETAILS IS CURRENTLY IN USE BY (EMAIL of CURRENT USER with editing rights) AND IS NOT AVAILABLE TO BE EDITED AT THIS TIME.

**KCR UID:** 0016 8075

**Assigned Functional Area:** Transportation  
**KCR# & Description:** KCR-TO-0001 - FOB Origin  
**Surveillance Event:** Delivery  
**Surveillance Activity:** Shipping by contractor not authorized  
**Surveillance Sub-Activity:** N/A

**Surveillance Execution Info:**

<b>Risk Consequence</b>			
<b>Risk Consequence – Cost:</b>	3	<b>(Auto) Risk Consequence:</b>	<u>3</u>
<b>Risk Consequence – Schedule:</b>	N/A	<b>Risk Likelihood:</b>	4
<b>Risk Consequence – Performance:</b>	N/A	<b>(Auto) Risk Rating, Baseline:</b>	<u>17</u>
<b>Allocated Hours:</b>	45	<b>(Auto) Risk Rating, Current:</b>	<u>17</u>

**Figure 7.6**

### 7.3 Viewing KCR Data

An at-a-glance view of the KCR data can be viewed by selecting the “View” button on the KCR table. When this is done, a pop-up window will display a view of the KCR selected along with its contents. The window generated can be closed by either clicking the “X” button (in the top right corner) or the “Close” button (in the bottom right corner). An example of this display can be seen in **Figure 7.7**. Record locking is not affected when viewing a KCR. Data associated with this view is described in **Section 6**.

**KCR UID:** 0013 7199

**Assigned Functional Area:** Packaging  
**KCR# & Description:** KCR-PKG-0001 - RP001: DLA Packaging

**Surveillance Event:** N/A  
**Surveillance Activity:** N/A  
**Surveillance Sub-Activity:** N/A

**Surveillance Execution Info:**

**Risk Consequence**

<b>Risk Consequence - Cost:</b>	1	<b>(Auto) Risk Consequence:</b>	∞
<b>Risk Consequence - Schedule:</b>	N/A	<b>Risk Likelihood:</b>	1
<b>Risk Consequence - Performance:</b>	N/A	<b>(Auto) Risk Rating, Baseline:</b>	∞
<b>Allocated Hours:</b>	23	<b>(Auto) Risk Rating, Current:</b>	∞

**Rationale for Risk Consequence - Cost:**

**Rationale for Risk Consequence - Schedule:**

**Rationale for Risk Consequence - Performance:**

**Rationale for Risk Likelihood:**

**Surveillance Category:** Progress Evaluation  
**Intensity of Surveillance:** 1.5% AQL (Complex/Critical) Reduced  
**Surveillance Warranted:** Y  
**Allocated Hours:** 23.00

**Frequency of Surveillance:** Bi-weekly  
**Surveillance Location:** N/A  
**Risk/Resource:** N/A **Unallocated Hours:** N/A

**KCR Incoming from LOD/QALI:** N  
**LOD RCN:**  **LOD DCN:**

**KCR will be delegated:** N

**Start Date:** 05/24/2023 **End Date:** OPEN **Surveillance Complete:** N

**Applicable KTR Sub Location(s):**

**Applicable Contract(s):**

**Applicable Program(s):**

**Assigned Specialist(s):**

**Figure 7.7**

## 7.4 Filtering KCRs

Above the KCR Table are filtering options that can affect the number of displayed KCRs within the KCR table. In all cases, options are limited to those values saved within a KCR. (i.e.: Only Functional Areas for which a KCR is present on the SP will be available to select).

For example: The 5 KCRs displayed in the sample Plan on **Figure 7.8** fall within two functional areas (AO & QA). Because of this, the “Filter By” (for Functional Area) will only generate those two values (Aircraft Operations & Quality Assurance) in the dropdown.

**Key Contract Requirements (KCRs)**

Edit KTR Details
Scheduler
Records
Landing Page

**(M) Assigned Functional Area:** <SELECT> Select a Functional Area to begin creating a new KCR.

Filter By: **Functional Area:** <SELECT> Program: <SELECT>

**Team Code:** <SELECT> Contract: <SELECT>

**Functional Specialist:** Quality Assurance  
Aircraft Operations KCR Status: Active

**Surveil. Category:** <SELECT>

Sort By: Risk Rating (Descending) Apply Reset

Surveillance Requirement				Risk Consequence			Risk Rating					
KCR UID	KCR# & Description	Event	Activity	Sub-Activity	Cost	Sched	Perf	Likeli hood	Base	Curr	View	Edit
0013 7320	KCR-QA-0018-02 - 52.246-9085: Production Lot Testing (PLT) – Government	N/A	N/A	N/A	4	4	4	4	25	21	View	Edit
0013 7319	KCR-QA-0007 - First Article: (1) Government Test (2) Contractor Test	N/A	N/A	N/A		3	3	3	13	13	View	Edit
0013 7318	KCR-QA-0024 - Inspection Systems Requirement (Navy)	N/A	N/A	N/A	3			2	18	9	View	Edit
0013 7317	KCR-QA-0010 - Item Unique Identification and Valuation	N/A	N/A	N/A	1			1	1	1	View	Edit
0016 3979	KCR-AO-0001 - Ground and Flight Risk	N/A	N/A	N/A	1			1	1	1	View	Edit

**Figure 7.8**

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

**Note:** KCRs identified as Surveillance Not Warranted will now be identified with an asterisk (\*) and moved to the bottom of the list (regardless of risk rating) as shown in **Figure 7.9**.



**Key Contract Requirements (KCRs)**

(M) Assigned Functional Area:  *Select a Functional Area to begin creating a new KCR.*

Filter By: **Functional Area:**  **Program:**

**Team Code:**  **Contract:**

**Functional Specialist:**  **KCR Status:**

**Surveil. Category:**

Sort By:

Surveillance Requirement					Risk Consequence			Risk	Risk Rating			
KCR UID	KCR# & Description	Event	Activity	Sub-Activity	Cost	Sched	Perf	Likeli hood	Base	Curr	View	Edit
0013 7320	KCR-QA-0018-02 - 52.246-9085: Production Lot Testing (PLT) – Government	N/A	N/A	N/A	5	5	5	5	25	25	<input type="button" value="View"/>	<input type="button" value="Edit"/>
0013 7317	KCR-QA-0010 - Item Unique Identification and Valuation	N/A	N/A	N/A	1			1	1	1	<input type="button" value="View"/>	<input type="button" value="Edit"/>
0013 7319	KCR-QA-0007 - First Article: (1) Government Test (2) Contractor Test	N/A	N/A	N/A		3	3	3	13	13	<input type="button" value="View"/>	<input type="button" value="Edit"/>

**Figure 7.9**

**Associated Filtering for Figure 7.9**

- **Contract:** Filters KCRs in the table by Applicable Contract.
- **Functional Area:** Filters the table by KCR Functional Area.
- **Functional Specialist:** Filters the table by Assigned Functional Specialist within the KCR.
- **KCR Status:** Filter KCRs in the table by the KCR status. Dropdown defaults to “Active”. Other options include “Inactive”, and “Any” as shown in **Figure 7.9**.
- **Program:** Filters KCRs in the table by Applicable Program.
- **Surveil. Category:** Type of surveillance evaluation (DPE, DSE, PE, SPE) identified within the KCR.
- **Team Code:** Filters the table by Team Code of the KCR’s Assigned Functional Specialists.

**Associated Sorting for Figure 7.9**

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

- Risk Rating (Ascending)
- Risk Rating (Descending) – *default status*
- Start Date (Ascending)
- Start Date (Descending)

## Associated Button Functionality for **Figure 7.9**

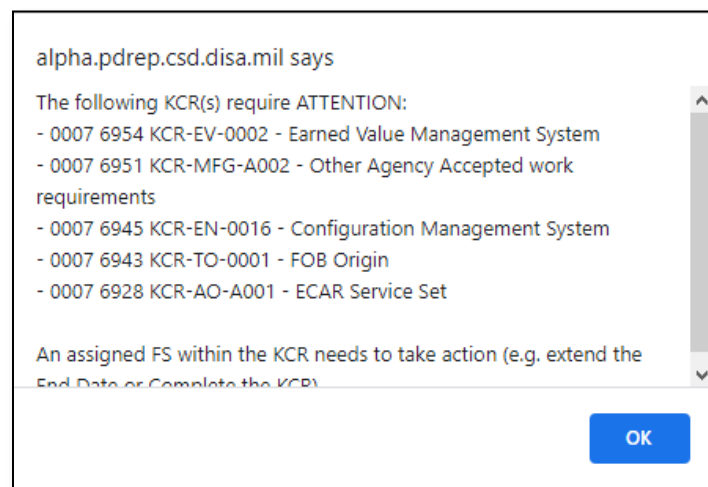
---

- **Apply:** Refreshes the pages display to implement Filter & Sort selections made.
- **Edit:** This button navigates to an editable display of the KCR. Record locking rules apply.
- **Edit KTR Details:** Navigates the user to an editable display of the KTR Details page (the “Multi-Function Surveillance Plan” page). Record locking rules apply.
- **Landing Page:** This button navigates back to the Landing Page of the Surveillance Plan being worked.
- **Records:** This button 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.
- **Reset:** Resets selections made to Filter & Sort back to their default status.
- **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 ID and Team Code associated with their profile.
- **View:** This button opens the KCR to a non-editable view.

## 7.5 KCR in Need of Attention

When a KCR has met or exceeded its End Date, it is known as a KCR Requiring Attention. In such instances, a pop-up message is generated to notify users that action needs to be taken (**Figure 7.10**), such as extended the end date or marking the KCR as complete.

This message is encountered each time the Key Contract Requirements Page is accessed and will only be cleared once action is taken to place the KCR back to an active timeframe. The pop-up window does not require the user to make any immediate changes; it is only a method to notify the functional specialist action is needed. The display will be like **Figure 7.10**. Click the “OK” button to close the window.

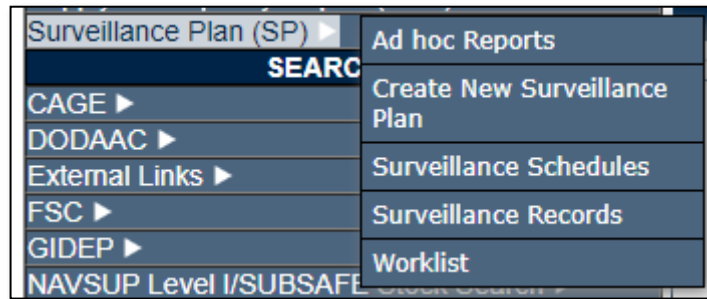


**Figure 7.10**

## 8 SEARCHING THE SP DATABASE – SP AD HOC

### 8.1 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 8.1**).



**Figure 8.1**

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 8.2**).

A screenshot of the 'Surveillance Plan Worklist' interface. At the top, there are several tabs: 'Surveillance Plan Worklist', 'Create Surveillance Plan', 'Surveillance Schedules', 'Surveillance Records', and 'Surveillance Plan Ad Hoc Reports'. The main content area has a dark blue header with the title 'Surveillance Plan Worklist'. Below the header, there are 'Instructions' for using the interface, followed by search criteria fields. The search criteria include: '(M) Worklist Type:' with a dropdown menu set to 'KTR Details'; '(M) Date SP Updated:' with 'From' and 'To' date pickers set to '02/06/2023' and '02/06/2024' respectively; 'Primary Location:' with a text input field and a 'Lookup' button; 'Status:' with a dropdown menu set to 'Any'; and several other text input fields for 'User ID:', 'Team Code:', 'CMT DoDAAC:', and 'KCR UID:'. At the bottom center, there is a 'Display Worklist' button.

**Figure 8.2**

**Figure 8.3** 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)

**Row Count:**

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

**Select Columns:**

Data Elements
*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

**Selected Data Elements**  
No columns selected

**Data Element:**

**Figure 8.3**

The “Select Data Record” dropdown, seen in **Figure 8.3**, 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” dropdowns are explained and outlined in the following sections.

## **8.2 Surveillance Plan (ALL) Dropdown**

Top-level Surveillance Plan data elements are available under the Surveillance Plan (ALL) dropdown. 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) dropdown, 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 8.4**.

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

My Ad hocs:  Open My Ad hoc Manage My Ad hocs

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

Row Count:

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

Select Columns: **Data Elements**

- \*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

Add Columns Delete Columns

**Selected Data Elements**

- \*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: \*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 8.4

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)" dropdown, include the \*Record UID.

### 8.3 Plan Level Product Characteristics Dropdown

This dropdown 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 8.5), it may appear that rows are repeating or duplicating (Figure 8.6).

My Ad hocs:  Open My Ad hoc Manage My Ad hocs

Select Data Record: Plan Level Product Characteristic Get Data Elements

Row Count:

maximum rowcount: 20000 (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

Add Columns Delete Columns

**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: \*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 8.5

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 8.6

Figure 8.6 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 3.2.5 of this document).

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. Char. Characteristic Classification	SP Prod. Char. Description	SP Prod. Char. End Item ID	SP Prod. Char. ESA Identified-CC	SP Prod. Char. 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 8.7

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.

### 8.4 KCR Risk Trend Report Dropdown

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 8.8.

Select Data Record:

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

**Selected Data Elements**

No columns

Data Element:

**Figure 8.8**

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 8.9**).

Select Columns: **Data Elements**

No columns to select

**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

Data Element:

**Figure 8.9**

Any condition(s) or expression(s) may be used, but a Primary Location at minimum is recommended, with a KCR UID next (**Figure 8.10**).

Select Data Record: KCR Risk Trend Get Data Elements

Row Count:

maximum rowcount:  (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

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 8.10

Run the Query to populate a table representing the Risk Trend (Figure 8.11).

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 8.11

Notes on the Risk Trend report functionality:

- 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.

## 8.5 Record Data Elements Dropdown

Record Level Data Elements are available under the Surveillance Plan (ALL) dropdown and the Record Data Elements dropdown.

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



## 8.6 Scheduler Data Elements Dropdown

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.

## 8.7 IDR Data Elements Dropdown

IDR Level Data Elements are only available under the IDR Data Elements dropdown, which includes the values found in the IDR Level Product Characteristics dropdown. 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 8.12**).

**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(IES) 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(IES) 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 8.12**

## 8.8 IDR Level Product Characteristics

These data elements were added to an additional dropdown 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 8.13**).

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 8.13

Click "Run Query" to populate the results in Figure 8.14.

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 8.14

There are three IDRs that repeat on multiple rows within Figure 8.14. This typically indicates there are multiple Product Characteristics associated with each of those IDRs. Figure 8.15 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 8.15

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.

### 8.9 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 8.16**), or can be found by clicking the User Guides selection under the Help menu on the top of any PDREP window (**Figure 8.17**).

## 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 8.16**

The screenshot shows the 'PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)' interface. At the top, there is a navigation bar with 'Home • Help' and 'User Profile: DCMA(ALPHA)USER • Logout'. Below this is a 'Surveillance Plan Ad Hoc Reports' section. A help menu is open on the left, listing several options: 'Contact Help Desk with comment, question, or feedback', 'Make a User Access or User Account Change', 'View the user guides for help' (highlighted with a red arrow), 'View the FAQs to see if the answer to my question is there', and 'Suggest a change to software or report a problem with the website'. The main content area displays instructions for creating an ad hoc report, including steps like 'Record and click Get Data Element', 'Add Where', and 'Click on RUN QUERY'.

**Figure 8.17**

## 9 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.

**Commercial:** 207.438.1690

**DSN:** 684.1690

**Fax:** 207.438.6535

## 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.

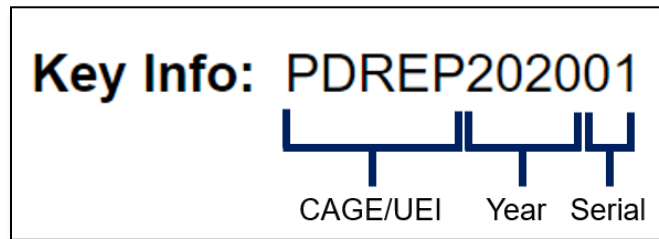


Figure A1.1

The screenshot shows a web interface for selecting data elements. At the top, there is a 'Get Row Count' checkbox and a 'Set maximum rowcount' field set to '20000' with a note '(Maximum size : 20,000)'. Below this are two columns: 'Data Elements' and 'Selected Data Elements'. The 'Data Elements' list includes: 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. The 'Selected Data Elements' list includes: Primary Location and SP Serial Number. Between the columns are 'Add Columns' and 'Delete Columns' buttons. To the right of the 'Selected Data Elements' list are up and down arrow buttons.

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



Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
History Recipient's Name and Email	Background	POC	Recipient of a message (Reviews / General Messages) if relevant in History	CHAR	40
History Recipients DoDAAC	History	To Activity	DODAAC of the History Notif. Recipient User.	CHAR	6
History Sender's Name and Email	History	POC	User ID who made the change or History Action	CHAR	40
History Sender's 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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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
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	VARCHAR R2	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	VARCHAR R2	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 R	20
IDR LOD RCN	Record IDR	LOD RCN	Record Control Number of the Incoming LOD of the KCR for the IDR Record.	VARCHAR R	20
IDR Manufacturing Spec.	Record IDR	Manufacturing Spec.	IDR Manufacturing Specification text box	CHAR	50

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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	Dropdown under the definition to select Process Findings	NUMBER	22
IDR Proc. Elem. Results	Record IDR	Results	Results of Process elements	CHAR	15
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	Dropdown 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	Dropdown to select ESA Identified-CC.	CHAR	5
IDR Prod. Chara. Insp. Req.	Record IDR	(M) Insp. Req.	Dropdown to select Product Characteristic Inspection Requirement.	CHAR	25
IDR Product Characteristic	Record IDR	(M) Product Characteristic	Dropdown to select Product Characteristic type.	CHAR	25
IDR Release Method	Record IDR	Release Method	Dropdown 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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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
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	CHAR	10

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			Specialist on a KCR retrieved from User profile separated by a comma		
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 Dropdown 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
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	CHAR	5

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			incoming LOD RCN/DCN		
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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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
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 dropdown. 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 dropdown. The Surveillance Activity data field may then	CHAR	100

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			populate if relevant to the selection.		
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 dropdown	CHAR	45
KCR Surveillance Subactivity	KCR	Surveillance Sub-Activity	Based on the Surveillance Activity selected, choose the Surveillance Sub-Activity from the dropdown.	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
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 dropdown 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



Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
KCR# & Description	KCR	KCR# & Description	Based on the Assigned Functional Area selected, choose the KCR# & Description from the dropdown. 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	Dropdown 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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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	VARCHA R2	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	VARCHA R2	20
Rec. *End Item Serial No.	Record	*End Item Serial No.	Text entered at the record level	VARCHA R2	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	Dropdown selection of Increase Surveillance, Decrease Surveillance, No Change	CHAR	1
Rec. Actual Hours	Record	Actual Hours	Record actual hours	VARCHA R2	6
Rec. Alt. Address	Record	Alt. Address	Alternative address on record page.	VARCHA R2	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	Dropdown 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	CHAR	1

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			THE RECORD AND A 'N' IF THERE IS NO ATTACHMENT.		
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	VARCHA R2	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	VARCHA R2	3,000
Rec. Evaluation Item	Record	Rec. Evaluation Item	Evaluation item on record	VARCHA R2	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 dropdown	VARCHA R	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	VARCHA R	20

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			when pulling from the ad hoc.		
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.	VARCHAR R2	6
Rec. Owner - Email	Record	FS Email	Email of the user who is associated (responsible) for the record.	VARCHAR R2	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	VARCHAR R2	50
Rec. Owner - Team Code	Record- Background	Background	Team Code of the user who is associated (responsible) for the record.	VARCHAR R2	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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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.	VARCHA R2	10
SO Rational	Scheduler	Background	Reschedule / Cancel comments	VARCHA R2	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	VARCHA R	6
SO Resch. User Team Code	Scheduler	Background	Team Code of the User who reschedules an occurrence	VARCHA R	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	VARCHA R2	200

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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
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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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
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	Dropdown 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	Dropdown to select ESA Identified-CC.	CHAR	5
SP Prod. Chara. Insp. Req.	Plan	(M) Insp. Req.	Dropdown to select Product Characteristic Inspection Requirement.	CHAR	25



Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
SP Product Characteristic	Plan	(M) Product Characteristic	Dropdown 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	Dropdown 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