



DCMA Surveillance Plan (SP) Records

User Guide
29 January 2024

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FOREWORD

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

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

REFERENCES

- Acquisition.gov – Product and Service Code Manual
- DCMA Instruction 2301 – Contractor Effectiveness
- DCMA Manual 2301-05 – NSEP
- DCMA Instruction 2303 – Surveillance
- DCMA Manual 2303-01 – Surveillance
- DCMA Manual 2301-01 – Contractor Business Systems
- DCMA Manual 2301-07 – Contract Safety
- DCMA Instruction 2302 – Small Business
- DCMA Manual 2302-01 – Small Business
- DoD Instruction 5000.79 – Defense-wide sharing and use of Supplier and Product Performance Information
- NAVSO P3683D – Product Data Reporting and Evaluation Program (PDREP)
- Resource Page found: 2303-01 "Surveillance" (sharepoint-mil.us) (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 by submitting a help desk ticket either via the "Contact Help Desk" button in the lower right corner of our PDREP website or via the "Help" menu within the PDREP-AIS Application.

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

NSLC Portsmouth Help Desk

Commercial Phone: (207) 438-1690 / DSN 684-1690

FAX: (207) 438-6535 / DSN 684-6535

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
FUNCTIONAL SPECIALISTS (FS)/Team Lead	View Access Plus: <ul style="list-style-type: none"> • Create a Plan • Edit a Plan • View History Page • Add attachments (their uploads) • Delete Attachments (their uploads) • View all attachments • Add KCR to Plan • Assign themselves to KCRs • Remove themselves from KCRs • Assign KCR to a user within their team • Edit a KCR they are assigned to 	View Access Plus: <ul style="list-style-type: none"> • For assigned KCRs, users can view, create and edit Schedule <ul style="list-style-type: none"> ○ Cancel an occurrence with note ○ Reschedule an occurrence with note ○ Delete an occurrence with note 	View Access Plus: <ul style="list-style-type: none"> • For occurrences assigned to the FS users can create, edit and complete Records <ul style="list-style-type: none"> ○ Send message to review Record

Role	Plan	Scheduler	Records
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).
Headquarters (expected for future release)	<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.

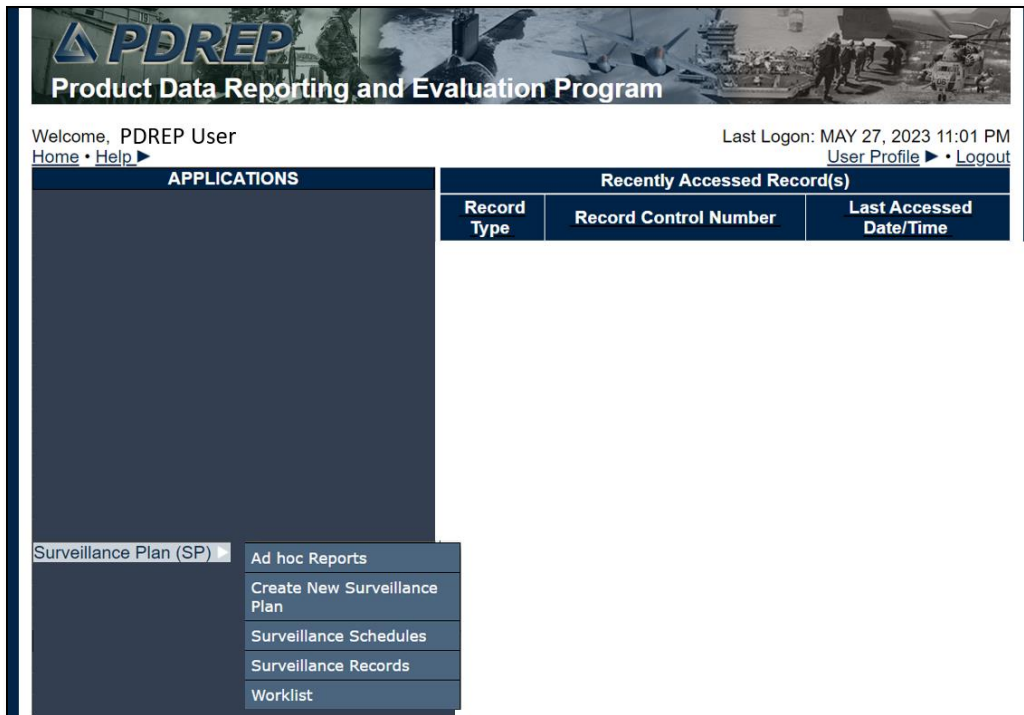


Figure 1.1

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).

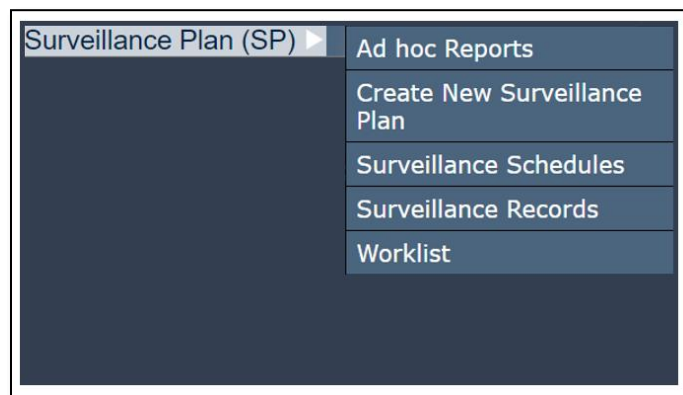


Figure 1.2

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). For those users already working in the SP module, select the “Surveillance Plan Worklist” tab at the top of the page (Figure 2.2).

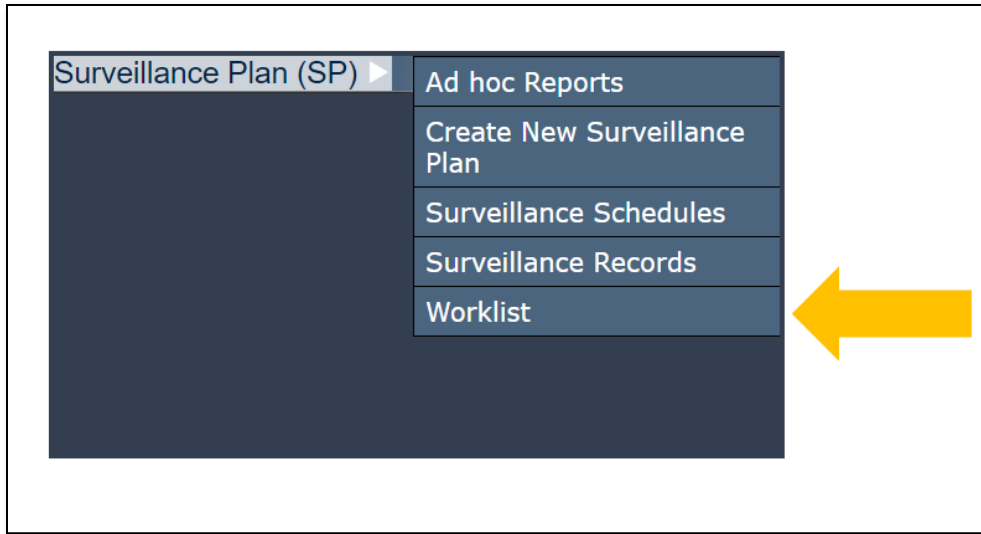


Figure 2.1

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
 4. Select **Status** as optionally needed
 5. 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 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. 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, there 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 is a pagination bar with "< Prev", "Page 1 of 1", "Next >", a yellow banner with "Result count: 1", and a dropdown menu set to "50" with the text "rows per page".

Figure 2.3

KCR	Prime Location	Company Name	Surv. Category	KCR UID	KCR# & Description	KCR Status	Last Update Date	KTR Attachments	View KCR		
	81316	PORTSMOUTH NAVAL SHIPYARD	DPE	0019 2560	KCR-AO-0001 - Ground and Flight Risk	Active	10/11/2023	Click Here	View		
KTR Details	Prime Location	Company Name	Surv. Type	KTR Status	Last Update Date	Last Action	KTR Attachments	View KTR			
	81316	PORTSMOUTH NAVAL SHIPYARD	PLAN	Active	10/11/2023	SURVEILLANCE PLAN END ITEM ADDED	Click Here	View KTR Details			
RECORD	Prime Location	Company Name	KCR UID	KCR# & Description	Record UID	Record Type	Record Status	Last Update Date	KTR Attachments	Record Attachments	View Record
	81316	PORTSMOUTH NAVAL SHIPYARD	0019 2560	KCR-AO-0001 - Ground and Flight Risk	81316-1023-0001	DPE	Draft	10/11/2023	Click Here	View Record Attachments	View Record

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:** Select this hyperlink to navigate to the indicated Surveillance Plan.
- **Surv. Category:** Type of surveillance evaluation (DPE, DSE, PE, SPE) identified within the KCR.
- **View KCR:** Select this hyperlink to navigate 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:** Select this hyperlink to navigate to the indicated Surveillance Plan.
- **Surv. Type:** This column indicates the type of Surveillance Plan. Currently, only one is available – “Plan”.
- **View KTR:** Select this hyperlink to navigate 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.
- **Prime Location:** Select this hyperlink to navigate to the indicated Surveillance Plan.
- **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.
- **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 that 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:** Select this hyperlink to navigate 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 RECORD LOCKING

3.1 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 3.1**.

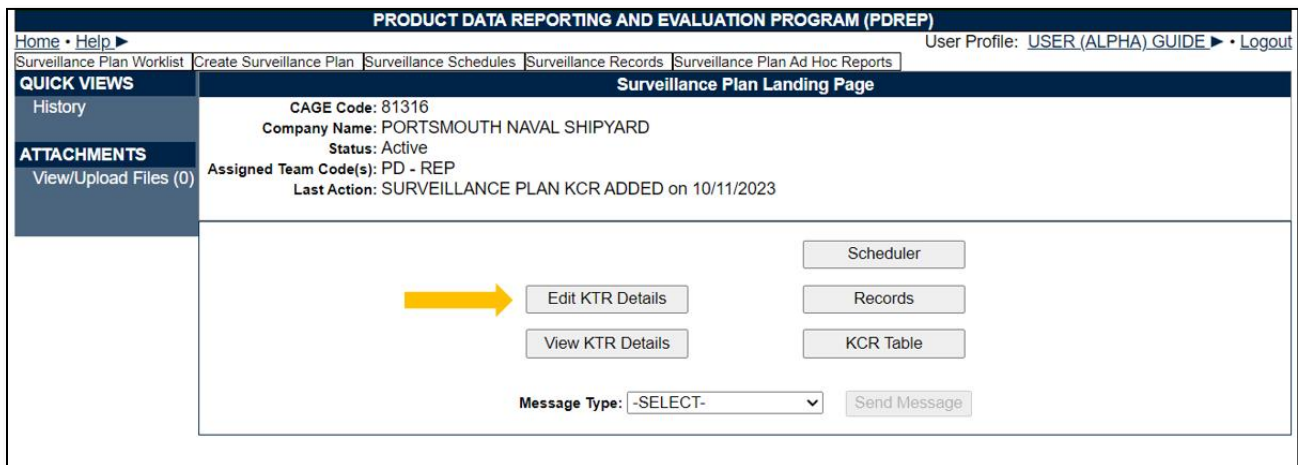


Figure 3.1

3.2 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 3.2** for an example of this message).

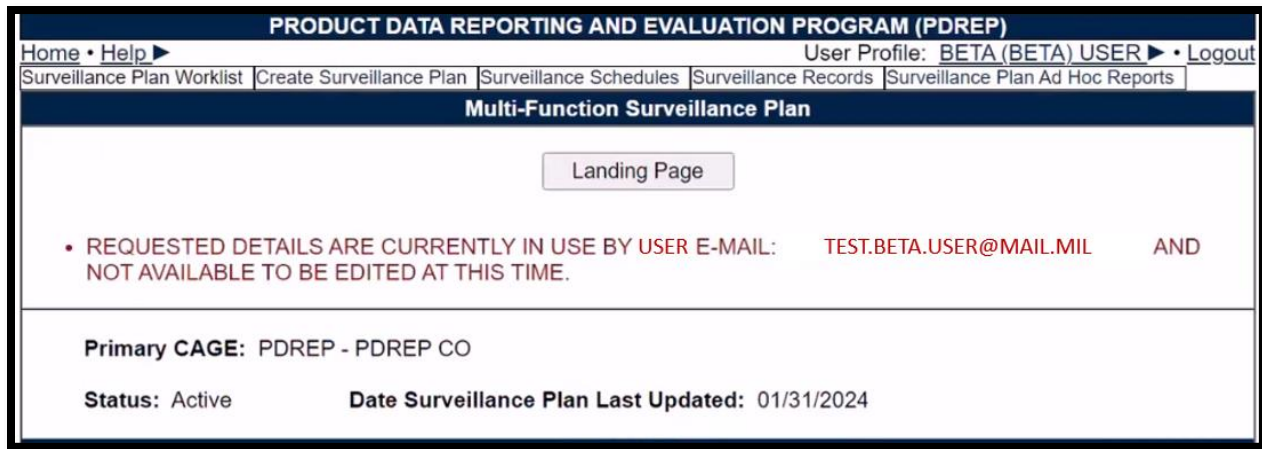


Figure 3.2

3.3 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 3.3.

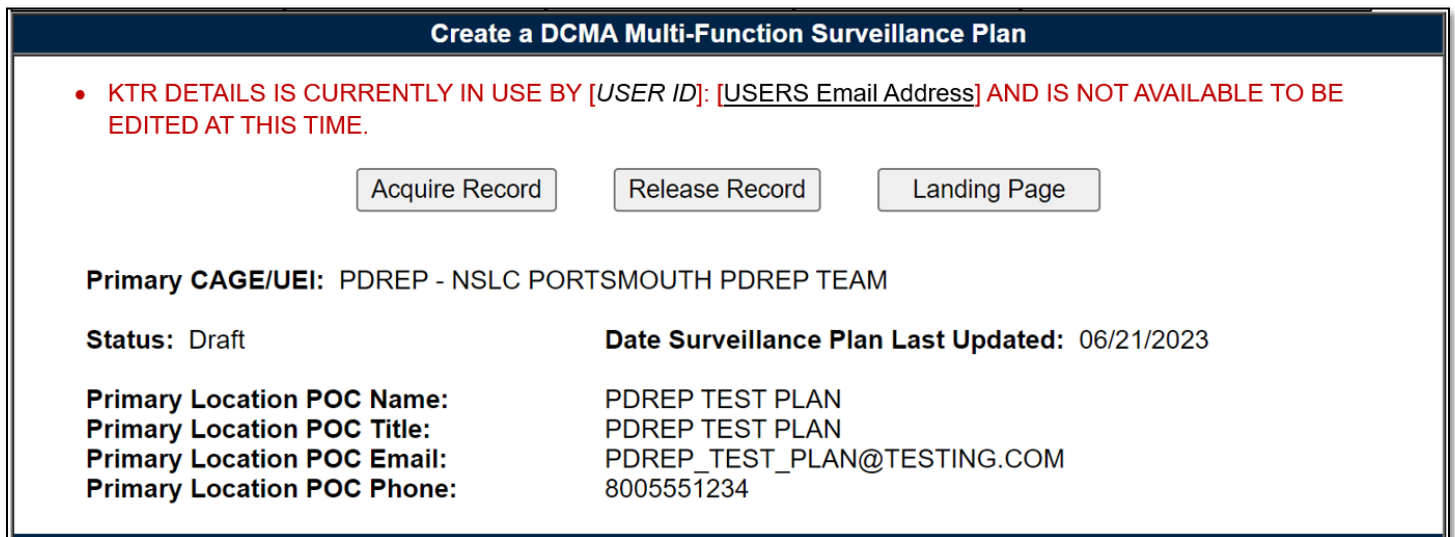


Figure 3.3

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 3.4.

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 3.4

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 3.5**.

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 3.5

Associated Data Fields for Figure 3.5

- **Record Locked Display:** User ID and Email of the user working within the Plan.

Associated Button Functionality for **Figure 3.5**

- **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.

3.4 Avoid Record Locking

To allow other Surveillance Plan users access to the KTR Details page and its 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 3.6**.

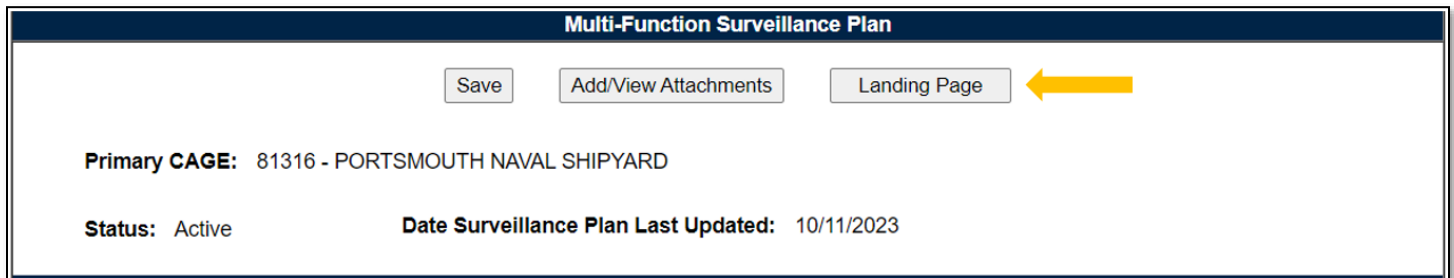


Figure 3.6

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*).

4 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 4.1**. 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 its associated documents (at the Plan level).

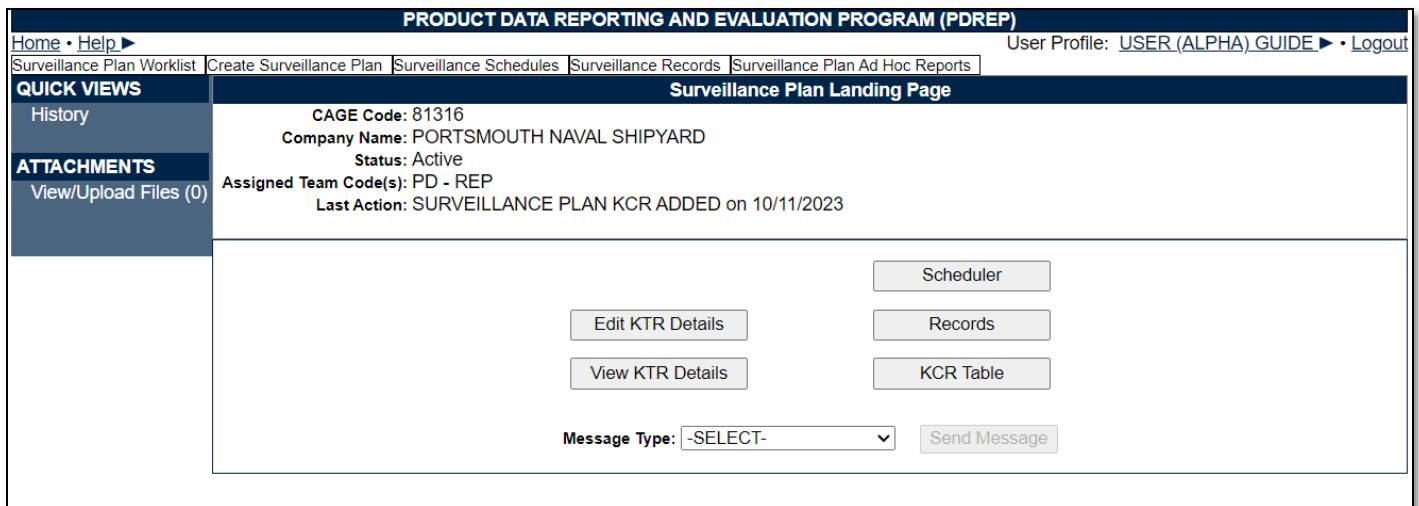


Figure 4.1

Associated Data Fields for Figure 4.1

- **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 4.1

- **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 4.1

- **History:** This hyperlink opens the reference History of the Plan. Current functionality is limited to displaying History for KCRs and KTR Details.
- **Message Type:** This 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.

4.1 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.

4.2 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.

4.2.1 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 4.2**.

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)

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

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

Send Message

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

Send Cancel

CAGE Code: 81316

This correspondence will be sent to the following recipients

To: Add To Email: To List

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

Add TO Email Add CC Email

Add CC Email: CC List

Si

Content: To view the complete record and provide comments to the associated DCMA FS, log into PDREP Surveillance Plan Program: PDREP HOME

Send Cancel

Figure 4.2

4.2.2 Creating a Correspondence

To initiate a correspondence, locate the “Message Type” dropdown on the Plan’s Landing Page (see **Figure 4.3**) 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 4.3**. Click the “Send Message” button to initiates the creation of the correspondence and open the “Send Message” page.

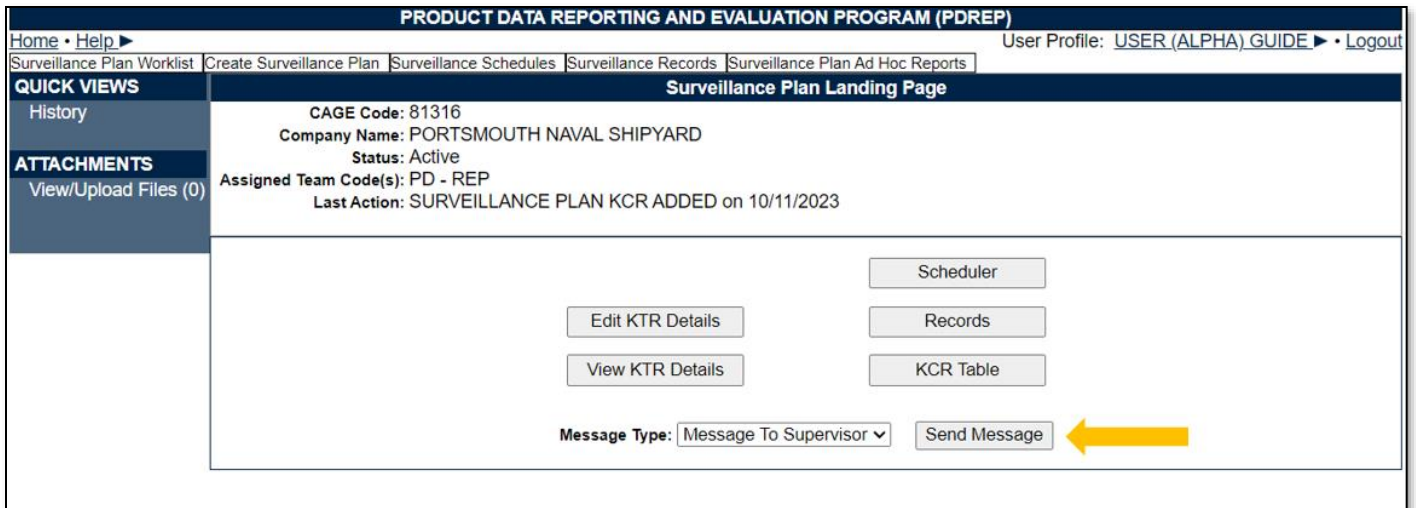


Figure 4.3

After the automatic page refresh (initiated by the “Send Message” button) is finished, the Send Message page will display as seen in **Figure 4.4**. Page instructions are listed at the top of the page with two functional buttons (Save & Cancel) located below.

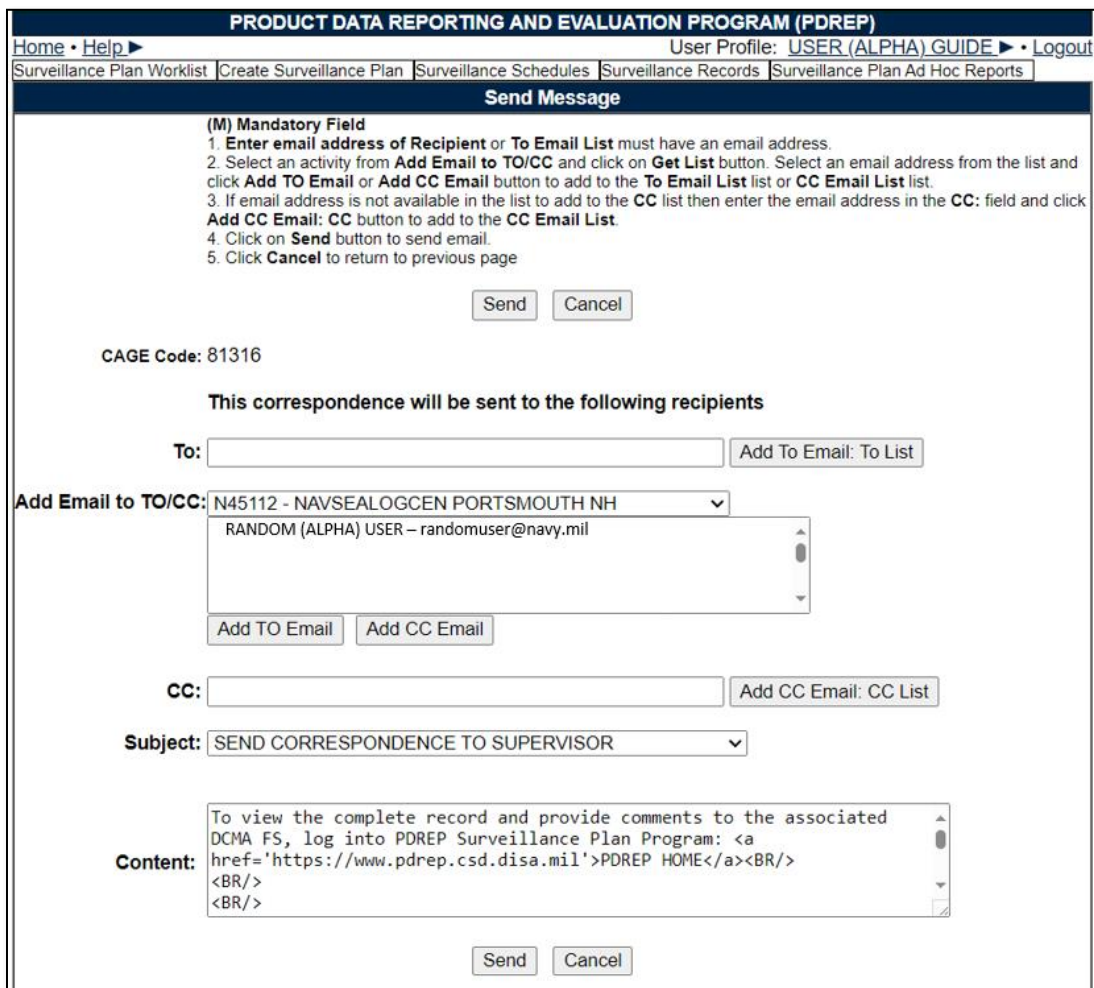


Figure 4.4

4.2.2.1 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 4.5**.



Figure 4.5

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 4.6**.

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.

A screenshot of a web form for creating correspondence. At the top left, it says "CAGE Code: 81316". Below that, a heading reads "This correspondence will be sent to the following recipients". The form includes several fields and buttons: a "To:" text input field with an "Add To Email: To List" button to its right; an "Add Email to TO/CC:" dropdown menu currently showing "N45112 - NAVSEALOGCEN PORTSMOUTH NH", with a scrollable list of options below it including "FIRST (ALPHA) LAST - anonymous@navy.mil" and "RANDOM (ALPHA) USER - randomuser@na"; two buttons, "Add TO Email" and "Add CC Email", positioned below the scrollable list; a "TO Email List:" dropdown menu currently showing "RANDOM (ALPHA) USER - randomuser@na" with a "Remove" button to its right; a "CC:" text input field with an "Add CC Email: CC List" button to its right; and a "Subject:" dropdown menu currently showing "SEND CORRESPONDENCE TO SUPERVISOR".

Figure 4.6

4.2.2.2 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.

4.2.2.3 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 4.7**).

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
 as seen in **Figure 4.10**, 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 4.7**.

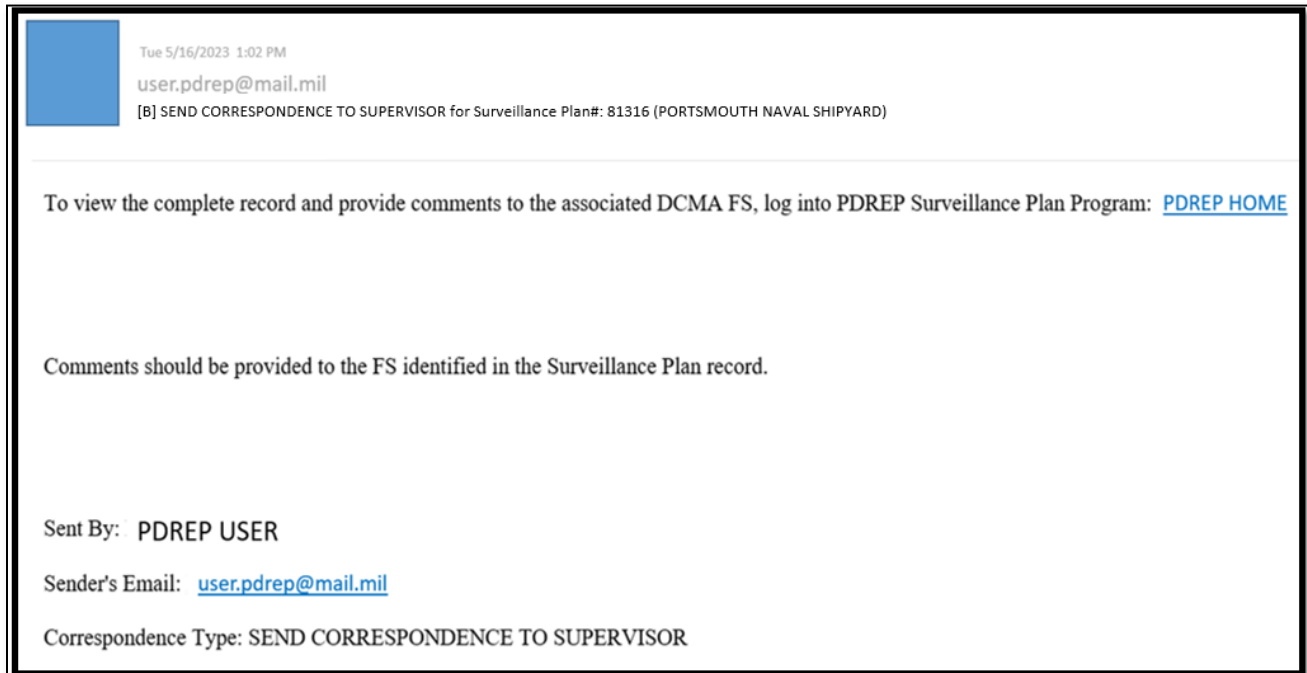


Figure 4.7

Associated Data Fields for **Figure 4.7**

- **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 4.7**

- **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 4.8**).

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

Figure 4.8

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**.

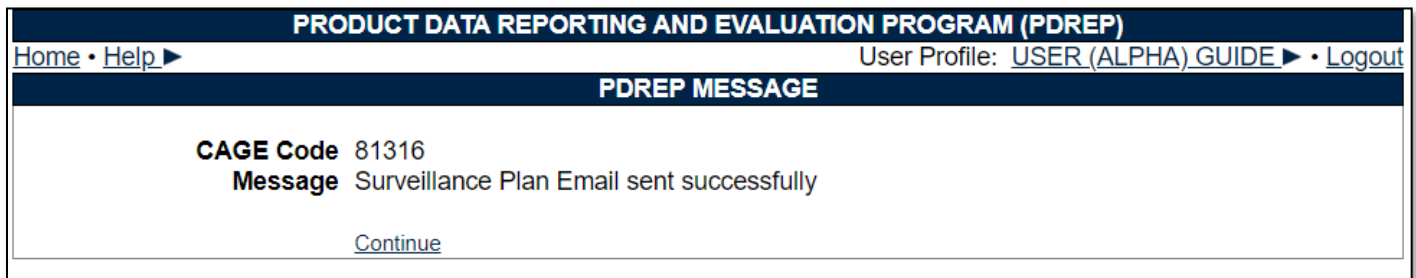


Figure 4.9

Lastly, a Record of the correspondence is added to the History Page (**Figure 5.10**).

10/11/2023	N45112	USER (ALPHA) GUIDE	N45112	USER (ALPHA) GUIDE	SEND CORRESPONDENCE TO SUPERVISOR	MESSAGE: TO VIEW THE COMPLETE RECORD AND PROVIDE COMMENTS TO THE ASSOCIATED DCMA FS, LOG INTO PDREP SURVEILLANCE PLAN PROGRAM: PDREP HOME 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 4.10

4.3 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 4.11**. 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 4.11

Associated Data Fields for **Figure 4.11**

- **Correspondence:** Type of action associated with the History line item.
- **Date Released:** Date the action occurred.
- **From Activity:** DoDAAC of the user who initiated the action/sent the correspondence.
- **From POC:** User who initiated the action/sent the correspondence.
- **Message:** Relevant details pertaining to the action or notification.
- **POC:** User receiving the correspondence.
- **To Activity:** DoDAAC of the user receiving the correspondence.

5 ACCESSING SP RECORDS

On the PDREP Home Page, select “Surveillance Records” from the “Surveillance Plan (SP)” fly-out (Figure 5.1).



Figure 5.1

The default page of Surveillance Records will generate. This view does not prepopulate any information and requires a Primary CAGE be entered. Select the “Display KCRs” button to access the Plan’s associated Record Page (Figure 5.2).

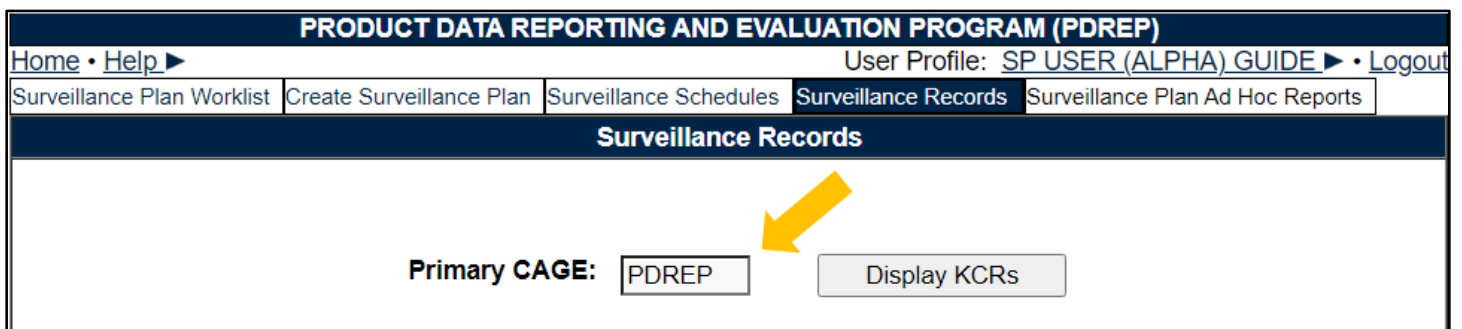


Figure 5.2

When a CAGE Code has been entered without an existing Surveillance Plan, a notification will display instructing the user a Plan does not exist. An example of this display may be seen in Figure 5.3.

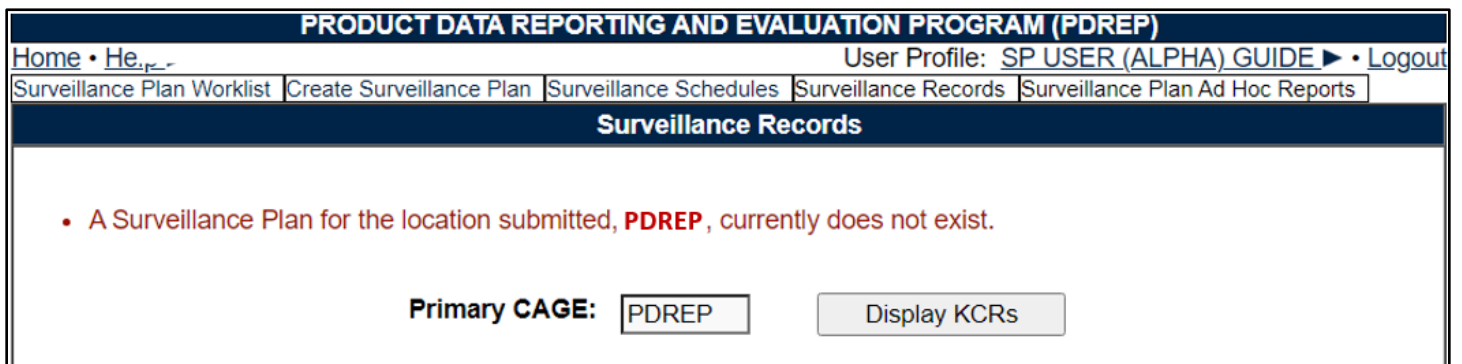


Figure 5.3

For those instances where a Surveillance Plan has been created but does not have at least one KCR associated to it, the tools’ navigational buttons will display (after selecting the “Display KCRs” buttons)

with a notification instructing the user to add KCRs via the Worklist. An example of this display may be seen in **Figure 5.4**.



Figure 5.4

If already working in the application and within a specific Plan, select the “Surveillance Records” tab at the top of the page, or use the navigational button labeled “Records” to access the associated Plan’s Record Page along with the related worklist (**Figure 5.5**).

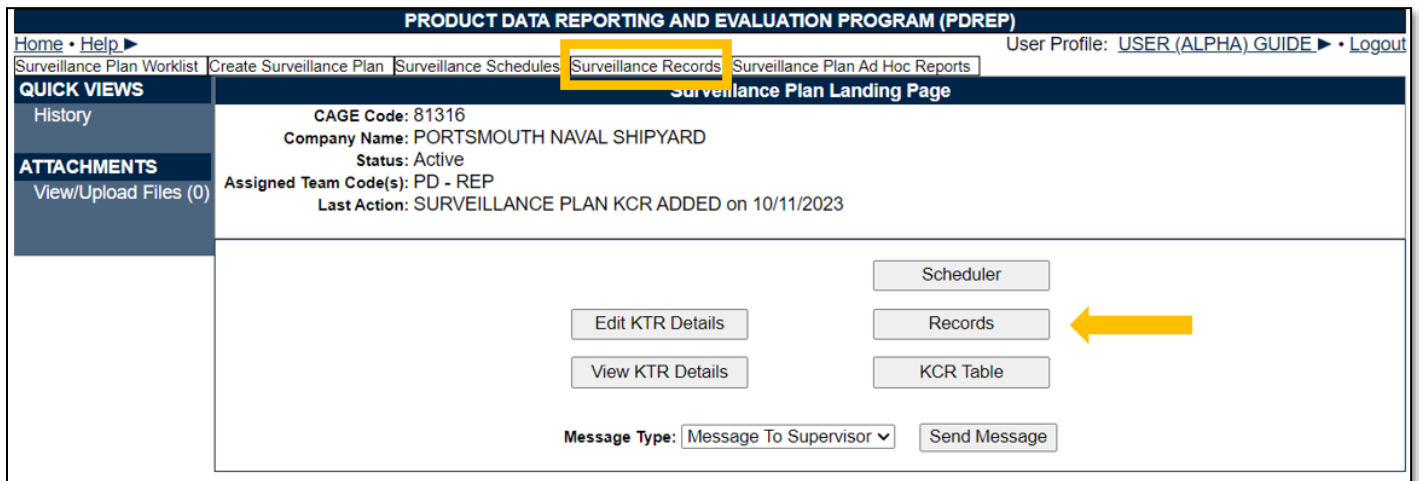


Figure 5.5

5.1 SP Records Page

After accessing the Records Page (via navigational buttons or entering the Primary CAGE Code into the data field and selecting the “Display KCRs” button), there will be four to five sections that make up the SP Records Page display.

1. Associated KCR Table
2. Associated Records
3. Filtering KCRs
4. Key Contract Requirements View
5. Recently Accessed Records (*not always displayed*)

5.1.1 Recently Accessed Records

Populating at the top of the page directly under the navigational buttons are the Recently Accessed Records of the Plan being worked (see **Figure 5.6**). The Associated Records table displays the

associated Records that have had an action taken (save, complete, reopen or reassign) within the last 72 hours, regardless of the user who took the action.

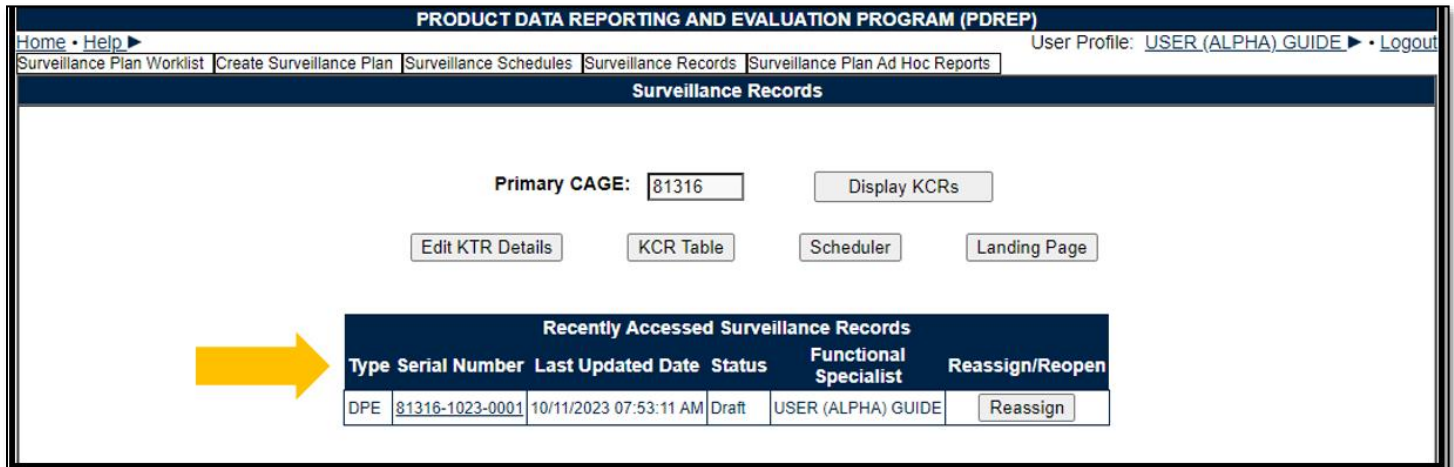


Figure 5.6

Associated Data Fields for Figure 5.6

- **Functional Specialist:** Assigned FS responsible for the Record (also known as the Record Owner).
- **Last Updated Date:** The date the Record was last updated based on the “Save” action.
- **Serial Number:** Also known as the Record UID, this is the unique identifier of the Record. The Serial Number displays as the Plans 5-digit CAGE Code, 2-digit month & 2-digit year, ending with a 4-digit sequential creation number (CAGE – MMY – ####).
- **Status:** The present status (*Draft/Complete*) of the Record.
- **Type:** Type of surveillance evaluation associated with the KCR (DPE, DSE, PE, SPE).

Associated Hyperlink & Button Functionality for Figure 5.6

- **Display KCRs:** Displays the KCRs for the Primary CAGE listed in the data field.
- **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.
- **Landing Page:** This button navigates back to the Landing Page of the Surveillance Plan being worked.
- **Reassign/Reopen:** The Reassign/Reopen column displays either one button or the other depending on the Record status. The “Reassign” button populates when the Record is in a draft status, while “Reopen” displays for completed Records. This column only populates for users with Supervisor or higher access and button functionality enabled within the same Team. **Figure 5.7** shows an example of what the display would look like when the user has the proper access level but a different Team Code than the Record Owner.
- **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 associated with their profile.

- **Serial Number:** Also known as the Record UID, this is the unique identifier of the Record. When selected, this hyperlink will open the Record to the appropriate display per the user selecting it (draft for the Record Owner/view for all other users).

Surveillance Records

Primary CAGE/UEI:

Recently Accessed Surveillance Records					
Type	Serial Number	Last Updated Date	Status	Functional Specialist	Reassign/Reopen
DSE	PDREP-0623-0002	06/15/2023 03:36:55 PM	Draft	BETA (BETA) USER	
DSE	PDREP-0623-0001	06/15/2023 03:36:30 PM	Draft	BETA (BETA) USER	

Figure 5.7

The Recently Accessed Records table will be hidden after 72 hours of inactivity. An example of this may be seen in **Figure 5.8**. It will immediately reengage when a completed action has been made on an associated Record of the Plan.

Surveillance Records

Primary CAGE:

81316-1023-0004 was successfully created as an On-Demand Record.

Recently Accessed Surveillance Records						
Type	Serial Number	Last Updated Date	Status	Functional Specialist	Reassign/Reopen	
SPE	81316-1023-0004	10/12/2023 08:03:59 AM	Draft	USER (ALPHA) GUIDE	<input type="button" value="Reassign"/>	
PE	81316-1023-0003	10/12/2023 08:01:14 AM	Draft	USER (ALPHA) GUIDE	<input type="button" value="Reassign"/>	
DSE	81316-1023-0002	10/11/2023 11:51:21 AM	Draft	USER (ALPHA) GUIDE	<input type="button" value="Reassign"/>	
DPE	81316-1023-0001	10/11/2023 07:53:11 AM	Draft	USER (ALPHA) GUIDE	<input type="button" value="Reassign"/>	

Filter By: **Functional Area:** **Program:**
Team Code: **Contract:**
Functional Specialist: **KCR Status:**
Surveil. Category:

Sort By:

Surveillance Requirement				Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open	
KCR UID	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0019 2560	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Approval & Qualification	N/A	DPE	1			1	1	1	Active	1/1	<input type="button" value="Open KCR"/>
0019 2562	KCR-AQ-0022 - 252 217-7028: Over and Above Work	N/A	N/A	PE	1			1	1	1	Active	1/1	<input type="button" value="Open KCR"/>
0019 2563	KCR-AQ-0019 - 52.246-15: Certificate of Conformance	N/A	N/A	SPE	1			1	1	1	Active	1/1	<input type="button" value="Open KCR"/>
0019 2561	KCR-CS-0002 - Arms, Ammunition & Explosives	Chapter 10 - Fire Protection	Fire Suppression Systems	DSE	1			1	1	1	Active	1/1	<input type="button" value="Open KCR"/>

Figure 5.8

5.1.2 Filtering KCRs

Beneath the Recently Accessed Records Table or the Plan’s navigational buttons (when the table is not available), are the filter & sort features that can affect the number of displayed KCRs within the associated KCR table. In all cases, options are limited to those values saved within a KCR.

*For example: The four KCRs displayed in the sample Plan on **Figure 5.9** fall within three functional areas (AO, CS & QA). Because of this, the “Filter By” for Functional Area will only generate those two values (Aircraft Operations, Contract Safety & Quality Assurance) in the dropdown.*

Filter By: Functional Area:	<SELECT>	Program:	<SELECT>
Team Code:	<SELECT>	Contract:	<SELECT>
Functional Specialist:	Aircraft Operations	KCR Status:	Active
Surveil. Category:	Contract Safety		
	Quality Assurance		
Sort By:	Risk Rating (Descending)	Apply	Reset

Surveillance Requirement				Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open	
KCR UID	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0019 2560	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Approval & Qualification	N/A	DPE	1			1	1	1	Active	1/1	Open KCR
0019 2562	KCR-AQ-0022 - 252.217-7028: Over and Above Work	N/A	N/A	PE	1			1	1	1	Active	1/1	Open KCR
0019 2563	KCR-AQ-0019 - 52.246-15: Certificate of Conformance	N/A	N/A	SPE	1			1	1	1	Active	1/1	Open KCR
0019 2561	KCR-CS-0002 - Arms, Ammunition & Explosives	Chapter 10 - Fire Protection	Fire Suppression Systems	DSE	1			1	1	1	Active	1/1	Open KCR

Figure 5.9

By default, the associated KCR table will only 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 those associated 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.

Associated Filtering for **Figure 5.9**

- **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's status. Dropdown defaults to "Active". Other options include "Inactive" and "Any".
- **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 5.9**

- **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 5.9

- **Apply:** Will further filter the KCR Worklist based on the additional filters entered
- **Reset:** Returns selections made to Filter & Sort back to their default status.

5.1.3 Associated KCR Table

The Plans Associated KCRs are in a table beneath the area in which Associated KCRs are filtered. The tables' 14 column display will default to "Active" KCRs but may accommodate views of "Inactive" KCRs or "Any" KCRs with proper filtering.

KCR UID	Surveillance Requirement				Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open
	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0019 2560	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Approval & Qualification	N/A	DPE	1			1	1	1	Active	1/1	Open KCR
0019 2562	KCR-AQ-0022 - 252.217-7028: Over and Above Work	N/A	N/A	PE	1			1	1	1	Active	1/1	Open KCR
0019 2563	KCR-AQ-0019 - 52.246-15: Certificate of Conformance	N/A	N/A	SPE	1			1	1	1	Active	1/1	Open KCR
0019 2561	KCR-CS-0002 - Arms, Ammunition & Explosives	Chapter 10 - Fire Protection	Fire Suppression Systems	DSE	1			1	1	1	Active	1/1	Open KCR

Figure 5.10

Associated Data Fields for Figure 5.10

- **Activity:** The Activity associated with the KCR. Field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **Baseline Risk Rating:** 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.
- **Cost:** The number associated with the Cost Consequence of the KCR.
- **Current Risk Rating:** The most present 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 KCR's 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 Status:** The status (*Active/Inactive*) of the KCR.
- **KCR UID:** The 8-digit unique identifier of the KCR.
- **KCR # & Description:** Key Contract Number & Description associated to the Surveillance Plan.
- **Perf:** The number associated with the Performance Consequence of the KCR.
- **Risk Likelihood:** The number associated with the Risk Likelihood of the KCR.
- **Sched:** The number associated with the Schedule Consequence of the KCR.
- **Sur. Category:** Type of surveillance (DPE, DSE, PE, SPE) identified within the KCR's Surveillance Category.

Associated Button & Hyperlink Functionality for Figure 5.10

- **Open KCR:** Button that opens the KCR to an editable view when selected. Record locking rules apply.

Note: When accessing the KCR via the “Open KCR” button, the tools’ navigation has been moved from the Records Page to the KCR Table. When the KCR is exited, the user’s location will be on the KCR table.

- **Year/Total Records:** Hyperlinked display of the KCR’s associated Records by present year and total count of cumulative Records that opens the KCR’s associated Records when clicked. The Records pertaining to the present year, located to the left of the divider, resets automatically back to zero as of January 1st, whereas the total count of cumulative Records, located to the right of the divider, will maintain a continuous count of all associated Records pertaining to the KCR.

For example: **Figure 5.11** shows KCR-QA-0008 - Inspection Systems display as 4/5. This indicates four Records have been created this year, but the KCR houses a total of five Records.

Surveillance Requirement				Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open
KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
KCR-QA-0007 - First Article: (1) Government Test (2) Contractor Test	First Article Test (FAT) Government	Documentation	DPE			3	3	13	13	Active	<u>1/1</u>	Open KCR
KCR-QA-0007 - First Article: (1) Government Test (2) Contractor Test	First Article Test (FAT) Contractor	Documentation	DPE			3	3	13	13	Active	<u>0/0</u>	Open KCR
KCR-QA-0008 - Inspection System	Final Inspection	N/A	DPE			3	3	13	13	Active	<u>4/5</u>	Open KCR
KCR-AQ-0074 - Foreign Military Sales (FMS)	(FMS Requirement) OR (8242) OR (FMS COUNTRY/CASE)	N/A	DPE			2	1	6	3	Active	<u>0/0</u>	Open KCR

Figure 5.11

5.1.4 Associated Records

Associated Records have been hidden to help reduce the returned display of the Records Page. By clicking on the “Year/Total Records” hyperlink, the page is prompted to display those hidden Records in a bonus section beneath the Associated KCR Table as shown in **Figure 5.12**. Surveillance Records, also known as the “Records Table”, houses the associated Records pertaining to the KCR, regardless of user or Record status. Any user with view access or a higher access may open and look at any Record, but the ability to edit or complete a Record is restricted to that of the Record Owner.

Surveillance Requirement				Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open	
KCR UID	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0016 8070	KCR-QA-0010 - Item Unique Identification and Valuation	Fabrication/Procurement	Labeling	DPE	5			5	25	25	Active	3/3	Open KCR
0016 8161	KCR-QA-0022 - Specialty Metals	Other Event User Defined	N/A	DPE	1		5	3	22	22	Active	2/2	Open KCR
0016 8077	KCR-TO-0002 - Transportation Account Code	Documentation	Missing financial transportation information	PE	4			3	18	18	Active	1/1	Open KCR
0016 8072	KCR-QA-A002 - Other Agency Accepted work requirements	Delivery	N/A	SPE	1			1	1	1	Active	5/5	Open KCR

Surveillance Records									
Create An On-Demand Record									

Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	Reopen	Delete	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)

Figure 5.12

Associated Data Fields for Figure 5.12

- **Actual Hours:** Field displaying the hours it took to conduct the surveillance as entered by the Record Owner.
- **Functional Specialist:** Assigned FS responsible for the Record. Also known as the Record Owner.
- **Last Updated Date:** The date the Record was last updated based on the “Save” action.
- **Serial Number:** Also known as the Record UID, this is the unique identifier of the Record. The Serial Number displays as the Plans 5-digit CAGE Code, 2-digit month & 2-digit year, ending with a 4-digit sequential creation number (CAGE – MMY – ####).
- **Status:** The status (*Draft / Complete*) of the Record.
- **Type:** Record type (DPE, DSE, PE, SPE) as determined by the KCR’s Surveillance Category.

Associated Button Functionality for Figure 5.12

- **Delete:** The ability to delete is a restricted functionality for those users with Supervisor (or higher) access, that are also on the same Team as the draft Record Owner. This button is grayed out for completed Records or for those Records containing a completed IDR. If a completed Record needs to be deleted, the Record is required to be “Reopened” first.
- **Reassign/Reopen:** The Reassign/Reopen column displays either one button or the other depending on the Record status. The “Reassign” button populates when the Record is in a draft status, while “Reopen” displays for completed Records. This column only populates for users with Supervisor or higher access and button functionality enabled within the same Team.

Associated Hyperlink Functionality for Figure 5.12

- **Attachments (#):** This hyperlink opens the “Upload Attachment(s)” page and allows users to upload, view, and delete attachments related to that of the Record being worked. The number

exhibited in parentheses indicates the number of attachments associated with the Record. This number does not take into consideration attachments made to the Plan, other Records, or IDRs. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.

- **Serial Number:** Also known as the Record UID, this is the unique identifier of the Record. When selected, this hyperlink will open the Record to the appropriate display per the user selecting it (draft for the Record Owner/view for all other users).

5.1.5 KCR View

A view of the KCR (along with its present entries) may be seen directly following the Surveillance Records Table. An example of this is shown in **Figure 5.13**. These areas are not a part of the page’s default view and can only be accessed by selecting the KCR’s hyperlink for “Year/Total Records”. This action prompts the Records Page to display the hidden sections related to the KCR.

0016 8161	KCR-QA-0022 - Specialty Metals	Other Event User Defined	N/A	DPE	1	5	3	22	22	Active	2/2	Open KCR
0016 8077	KCR-TO-0002 - Transportation Account Code	Documentation	Missing financial transportation information	PE	4		3	18	18	Active	1/1	Open KCR
0016 8072	KCR-QA-A002 - Other Agency Accepted work requirements	Delivery	N/A	SPE	1		1	1	1	Active	5/5	Open KCR

Surveillance Records

[Create An On-Demand Record](#)

Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 3		Delete	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	Reopen	Delete	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)

Key Contract Requirements (KCRs)

KCR UID: 0016 8072

Assigned Functional Area: Quality Assurance
KCR# & Description: KCR-QA-A002 - Other Agency Accepted work requirements
Other Agency Assigned Work Requirements: >
 TESTING - KCR HAS AN A002- TESTING

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

Surveillance Execution Info:

Figure 5.13

6 Record Creation

A Record may be created one of two ways, either as a Traditional Record or as a Record On-Demand. Most Records will be traditionally created. Traditional Records are established through the populated occurrences of the Scheduler. These Records are easy to create, locate and manage through the entirety of its lifecycle. On-Demand Records are created via the Records Page, are restricted to those users with Supervisor or higher access, and **they do not populate in the Scheduler**. Both Record types restrict editing to the Record Owner. However, either Record type

may be Reassigned to another user of the same Team Code, essentially transferring responsibility to a new Record Owner.

6.1 Traditional Record Creation

Traditional Records can only be created in the Scheduler by an assigned FS of the KCR. A draft Record is created by generating a schedule, locating the desired occurrence and selecting the “New” button to access the draft Record (see **Figure 6.1**). Once the draft Record opens, the “Save” button must be used to retain it. If the Record is exited before the “Save” button is used, all contents of the Record will be lost.

Note: 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!**

Status	CAGE/UEI	KCR UID	KCR	Event	Activity	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Active	UserID Assigned	Record UID	Surveillance Record
---	PDREP	0016 8070	KCR-QA-0010 - Item Unique Identification and Valuation	Fabrication/Procurement	Labeling	25	25	06/20/2023	06/27/2023	0	User	--	<input type="button" value="New"/> <input type="button" value="Re-Sched"/>
---	PDREP	0016 8077	KCR-TO-0002 - Transportation Account Code	Documentation	Missing financial transportation information	18	18	06/20/2023	06/27/2023	0	User	--	<input type="button" value="New"/> <input type="button" value="Re-Sched"/>

Instructions
(M) Mandatory Field
(CM) Conditional Mandatory Field
 1. Enter/modify mandatory field(s)
 2. Enter/modify additional information if available
 3. To save the record, click **Save**
 4. To cancel the process or go back, click **Back**
 5. Correct format for Date Elements is MM/DD/YYYY or use Calendar
 6. To add or view attachments click **Add/View Attachment**

Assigned FS: PDREP User **FS User Id:** User ID **FS Email:** PDREP.User@mail.mil **FS Phone:**

Record UID: N/A
KCR UID: 0016 8070

Surveillance Plan For: PDREP - NSLC PORTSMOUTH PDREP TEAM
Assigned Functional Area: Quality Assurance
KCR# & Description: KCR-QA-0010 - Item Unique Identification and Valuation
Surveillance Event: Fabrication/Procurement
Surveillance Activity: Labeling
Surveillance Sub-Activity: N/A

Prime KTR CAGE Code:

Delegation Number: - -

Surveillance Location: **Alternate Address:**

Figure 6.1

6.2 On-Demand Records

On-Demand Records are available to those users with an access level of Supervisor or higher access. They were implemented to create a singular Record for special circumstances outside of anticipated oversights. Though On-Demand Records adhere to the same rules as Traditionally created Records, **they do not populate in the Scheduler.**

To create an On-Demand Record, start by locating the desired KCR on the Records Page and select the “Year/Total Records” hyperlink to open the Surveillance Records area. The “Create An On-Demand Record” button will display at the top of the Surveillance Records area. Click the “Create An On-Demand Record” button to open the draft creation of the On-Demand Record (see **Figure 6.2**).

Surveillance Records

Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 3		<input type="button" value="Delete"/>	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	<input type="button" value="Reassign"/>	<input type="button" value="Delete"/>	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	<input type="button" value="Reopen"/>	<input type="button" value="Delete"/>	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	<input type="button" value="Reassign"/>	<input type="button" value="Delete"/>	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	<input type="button" value="Reassign"/>	<input type="button" value="Delete"/>	Attachments(0)

Figure 6.2

The pending On-Demand draft Record will open after the page refresh and requires a FS assignment, Start Date & End Date before the Record becomes a recognized draft Record (**Figure 6.3**). Once the data fields have been satisfied, select the “Reassign” button to capture the information and finalize the process of creating a draft Record.

System / Process Evaluation

Assigned FS: FS User Id: FS Email: FS Phone:

Re-Assigned FS: <SELECT>

(M) On-Demand Start Date:
(M) On-Demand End Date:

Record UID: N/A

KCR UID: 0019 2563

Surveillance Plan For: 81316 - PORTSMOUTH NAVAL SHIPYARD

Assigned Functional Area: Quality Assurance

KCR# & Description: KCR-AQ-0019 - 52.246-15: Certificate of Conformance

Surveillance Event: N/A

Surveillance Activity: N/A

Surveillance Sub-Activity: N/A

LOD RCN: N/A

LOD DCN: N/A

Delegator CAGE: N/A

Surveillance Location: N/A

Alternate Address: N/A

Applicable Programs

Applicable Program(s):

Figure 6.3

Associated Data Fields for **Figure 6.3**

- **(M) On-Demand End Date:** The date the surveillance is planned to conclude.
- **(M) On-Demand Start Date:** The date the surveillance evaluation is planned to begin.
- **Reassign FS:** Dropdown displaying the assigned FS (of the same Team Code) within the KCR. The selected user will become the Record Owner. Dropdown will be empty when lacking an assigned FS on the same Team.

Associated Button for **Figure 6.3**

- **Back:** Returns the display to the previous page.
- **Reassign:** Clicking this button saves the entries made on the page (acts as a save button).
- **View Attachments:** This button opens the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Record 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.

Note: When the Record UID is “N/A” it is a pending draft Record (it has not yet been saved). For this field to populate, the user must save the Record (**Figure 6.3a**).

Instructions
(M) Mandatory Field
(CM) Conditional Mandatory Field
1. Enter/modify mandatory field(s)
2. Enter/modify additional information if available
3. To save the record, click **Save**
4. To cancel the process or go back, click **Back**
5. Correct format for Date Elements is MM/DD/YYYY or use Calendar
6. To add or view attachments click **Add/View Attachment**

Assigned FS: **FS User ID:** **FS Email:** **FS Phone:**

Record UID: N/A
KCR UID: 0019 2540

Surveillance Plan For: 07070 - NAVY UNITED STATES DEPARTMENT OF THE
Assigned Functional Area: Aircraft Operations
KCR# & Description: KCR-AO-0001 - Ground and Flight Risk
Surveillance Event: F - Crew/Non-Crew Approval & Qualification
Surveillance Activity: N/A
Surveillance Sub-Activity: N/A
LOD RCN: N/A
LOD DCN: N/A
Delegator CAGE: N/A

Surveillance Location: **Alternate Address:**

Associated KCR's:

Figure 6.3a

A confirmation message will display as shown in **Figure 6.4** when an On-Demand Record has been successfully created/saved.

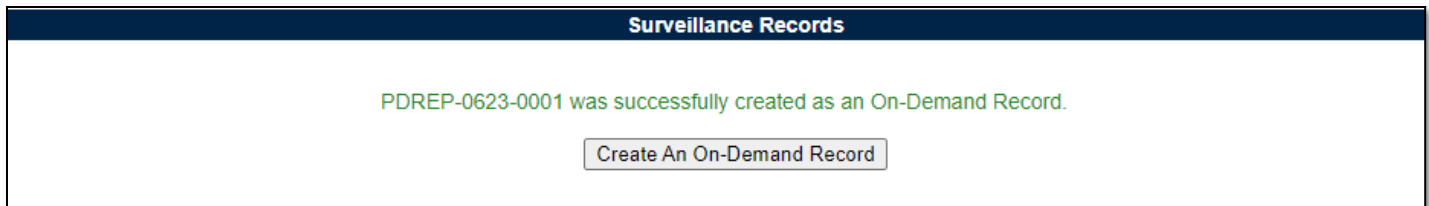


Figure 6.4

Note: PDREP does not have an auto-save feature. The “Reassign” button acts as a save feature and tells the tool to keep the information. Once the pending On-Demand draft Record has been created, the “Reassign” button must be used to register the page as a draft Record. *If the “Reassign” button is not used, work will be lost!*

Since On-Demand Records do not populate in the Scheduler, the tool has added cues to communicate when an On-Demand Record has met or exceeded its End Date. When such an instance occurs, the KCR UID text color will change from black to **red**. This serves as a cue the identified KCR contains an overdue Record.

Another cue can be seen in a notification of an overdue Record and the Record number. Displaying above the Recently Accessed Table, and at the top of the Surveillance Records Area will be a notification of each overdue On-Demand Record. An example of this may be seen in **Figure 6.5**. To clear these notifications, the overdue Record must be either completed or have its End Date extended.

Edit KTR Details KCR Table Scheduler Landing Page

- An On-Demand Surveillance Record is overdue, PDREP-0523-0158.
- An On-Demand Surveillance Record is overdue, PDREP-0523-0157.
- An On-Demand Surveillance Record is overdue, PDREP-0523-0148.

Recently Accessed Surveillance Records						
Type	Serial Number	Last Updated Date	Status	Functional Specialist	Reassign/Reopen	
DSE	PDREP-0623-0002	06/15/2023 03:36:55 PM	Draft	BETA (BETA) USER	Reassign	
DSE	PDREP-0623-0001	06/15/2023 03:36:30 PM	Draft	BETA (BETA) USER	Reassign	

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

Team Code: **Contract:**

Functional Specialist: **KCR Status:**

Surveil. Category:

Sort By: Apply Reset

Surveillance Requirement					Risk Consequence			Risk	Baseline	Current	KCR	Year/Total	Open
KCR UID	KCR# & Description	Event	Activity	Sur. Category	Cost	Sched	Perf	Likelihood	RR	RR	Status	Records	KCR
0013 7320	KCR-QA-0018-02 - 52 246-9085: Production Lot Testing (PLT) – Government	N/A	N/A	SPE	4	4	4	4	25	21	Active	5/5	Open KCR
0013 7319	KCR-QA-0007 - First Article: (1) Government Test (2) Contractor Test	N/A	N/A	PE		3	3	3	13	13	Active	0/0	Open KCR
0013 7318	KCR-QA-0024 - Inspection Systems Requirement (Navy)	N/A	N/A	DSE	3			2	18	9	Active	6/6	Open KCR
0013 7317	KCR-QA-0010 - Item Unique Identification and Valuation	N/A	N/A	DPE	1			1	1	1	Active	2/2	Open KCR
0016 3979	KCR-AO-0001 - Ground and Flight Risk	N/A	N/A	DSE	1			1	1	1	Active	2/2	Open KCR

Surveillance Records

- An On-Demand Surveillance Record is overdue, PDREP-0523-0158.
- An On-Demand Surveillance Record is overdue, PDREP-0523-0157.
- An On-Demand Surveillance Record is overdue, PDREP-0523-0148.

Create An On-Demand Record

Figure 6.5

7 Record Capabilities

Record Capabilities outside of editing or completing a draft Record is subject to certain restrictions such as Team, Code, User Access or Record Status. Any user with view access or a higher access may open and look at any Record, but the ability to edit or complete a Record is restricted to that of the Record Owner.

7.1 Delete Records

The ability to delete a Record is restricted by a user’s access level as well as their Team Code and the Record status. The Delete column (on the Records Page) populates for those users with an access level of Supervisor or higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). An example of a user with the proper access level but differing Team Code is shown on the first row of sample **Figure 7.1**.

Surveillance Records								
Create An On-Demand Record								
Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 3		Delete	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	Reopen	Delete	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)

Figure 7.1

The ability to delete a Record is also dependent upon the Record being in a draft status. The “Delete” button’s functionality is restricted to those Records marked as “Complete” and will display as grayed/disabled in such instances. An example of this is shown on the third row of sample **Figure 7.1**.

To delete a Record, open the Records Table by selecting the “Year/Total Records” hyperlink. Locate the desired Record to be deleted on the table and select the “Delete” button. A pop-up message will display requesting confirmation of the delete request (**Figure 7.2**).

- **OK:** Captures the request and eliminates the Record and its contents.
- **Cancel:** Refreshes the page, clears the delete request and returns to the top of the Records Page.

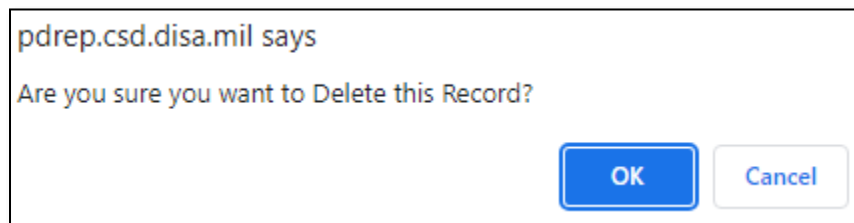


Figure 7.2

After the page refresh, a confirmation message will display as shown in **Figure 7.3**, stating the Record has been successfully deleted.

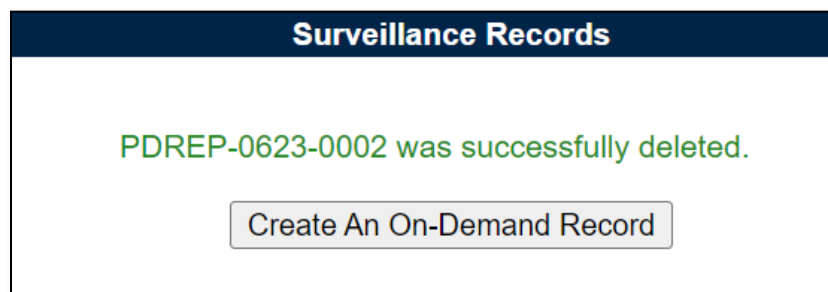


Figure 7.3

7.2 Record Reassign

The ability to Reassign a Record is restricted by a user’s access level as well as their Team Code and the Records status. The Reassign/Reopen column (on the Records Page) populates for those users with an access level of Supervisor or a higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). An example of a user with the proper access level but differing Team Code is shown on the first row of sample **Figure 7.4**.

Surveillance Records								
Create An On-Demand Record								
Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 3		Delete	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	Reopen	Delete	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)

Figure 7.4

The ability to Reassign a Record is also dependent upon the Record being in a draft status. The “Reassign” button’s functionality is restricted to those Records marked as “Complete” and will display as “Reopen” in such instances. An example of this is shown on the third row of sample **Figure 7.4**.

To reassign a Record, start by opening the Surveillance Records Table of the KCR for which the Record is associated. Locate the Record in need of being reassigned and select the “Reassign” button to initiate the process. A pop-up message will display requesting confirmation of the Reassign request as seen in **Figure 7.5**.

- **Cancel:** Refreshes the page, clears the delete request and returns to the top of the Records page.
- **OK:** Captures the request and eliminates the Record and its contents.

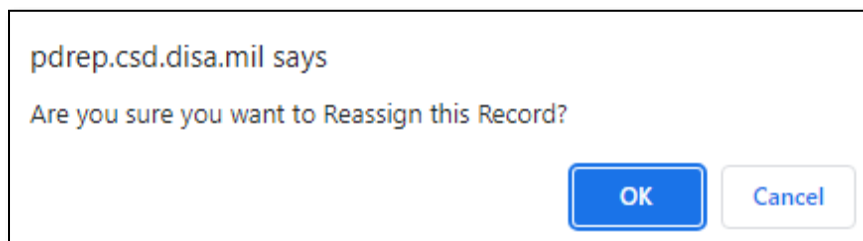


Figure 7.5

After the page refresh, the Record will open to a view only display except for the “Re-Assigned FS” field as shown in **Figure 7.6**. The dropdown populates with other assigned FS of the KCR who share

a Team Code. After selecting the intended user to take ownership of the Record, click the “Reassign” button to capture the change.

The screenshot shows a web interface titled "System / Process Evaluation". It displays the following information:

- Assigned FS:** Record Owner
- FS User Id:** OWNER
- FS Email:** RecordOwner@email.mil
- FS Phone:** (empty field)

Below this information are two buttons: "Back" and "View Attachments".

Further down, there is a "Re-Assigned FS:" dropdown menu currently set to "<SELECT>" and a "Reassign" button.

Record details include:

- Record UID:** PDREP-0523-0002
- KCR UID:** 0016 8072
- Surveillance Plan For:** PDREP - NSLC PORTSMOUTH PDREP TEAM
- Assigned Functional Area:** Quality Assurance
- KCR# & Description:** KCR-QA-A002 - Other Agency Accepted work requirements
- Surveillance Event:** Delivery
- Surveillance Activity:** N/A
- Surveillance Sub-Activity:** N/A
- Prime KTR CAGE Code:** N/A
- Delegation Number:** N/A
- Surveillance Location:** N/A
- Alternate Address:** N/A

Figure 7.6

After the page refresh, a confirmation message will display as shown in **Figure 7.7**, stating the Record has been successfully reassigned.

The screenshot shows a confirmation message in a box titled "Surveillance Records". The message text is "PDREP-0523-0002 was successfully reassigned." Below the message is a button labeled "Create An On-Demand Record".

Figure 7.7

7.3 Record Reopen

The ability to Reopen a Record is restricted by a user’s access level as well as their Team Code and the Record status. The Reassign/Reopen column (on the Records page) populates for those users with an access level of Supervisor or a higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). An example of a user with the proper access level but differing Team Code is shown on the first row of sample **Figure 7.8**.

Surveillance Records								
Create An On-Demand Record								
Type	Serial Number	Last Updated Date	Status	Actual Hours	Functional Specialist	Reassign/Reopen	Delete	Attachments
SPE	PDREP-0523-0011	05/31/2023 01:14:35 PM	Draft		PDREP User 3		Delete	Attachments(0)
SPE	PDREP-0523-0006	05/30/2023 10:14:28 AM	Draft		PDREP User 2	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0005	05/30/2023 10:13:58 AM	Complete	1.00	PDREP User 2	Reopen	Delete	Attachments(0)
SPE	PDREP-0523-0001	05/30/2023 10:05:26 AM	Draft	1.00	PDREP User 1	Reassign	Delete	Attachments(0)
SPE	PDREP-0523-0002	05/30/2023 09:31:08 AM	Draft		PDREP User 1	Reassign	Delete	Attachments(0)

Figure 7.8

The ability to Reopen a Record is also dependent upon the record being in a “Complete” status. The “Reopen” button’s functionality is restricted to those Records marked as “Complete” and will display as “Reassign” in such instances. An example of this is shown on the second row of sample **Figure 7.8**.

To Reopen a Record, start by opening the Surveillance Records Table of the KCR for which the Record is associated. Locate the Record in need of being reopened and select the “Reopen” button to initiate the process. A pop-up message will display requesting confirmation of the Reopen request as seen in **Figure 7.9**.

- **Cancel:** Refreshes the page, clears the delete request and returns to the top of the Records Page.
- **OK:** Captures the request and eliminates the Record and its contents.

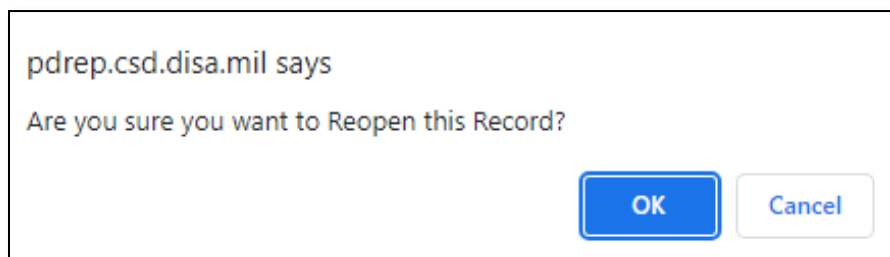


Figure 7.9

After the page refresh, a confirmation message will display as shown in **Figure 7.10** stating the Record has been successfully reopened.

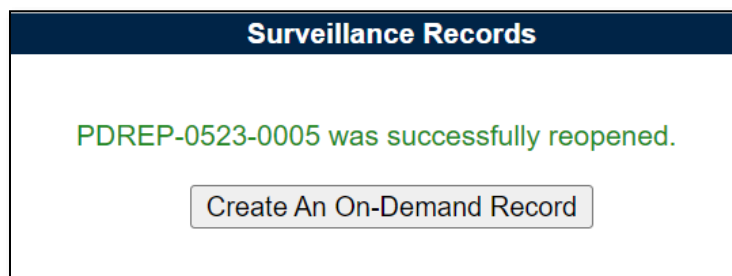


Figure 7.10

When a Record contains completed IDRs and is reassigned, the associated IDRs will be untouched and maintain their existing data. When a Record contains a draft IDR and is reassigned, the draft IDR(s) are also reassigned to the new Record Owner.

8 RECORD TYPES

The SP tool currently supports two Record types:

1. Deliverable Product Evaluation (DPE)/Deliverable Service Evaluation (DSE)
2. System Process Evaluation (SPE)/Progress Evaluation (PE)

9 DPE/DSE

Deliverable Product Evaluation (DPE) & Deliverable Service Evaluation (DSE)

Though Deliverable Product Evaluation (DPE) & Deliverable Service Evaluation (DSE) share the same display, there are a few differences.

- i. Page Title/Header
(states if the Record type is a DPE or a DSE)
- ii. DPEs can house IDRs.
(exclusive to Quality Assurance KCRs)
- iii. Evaluation Section will be absent for DPEs with IDRs

9.1 Creating a DPE or DSE

Since Record creation is restricted to one Record type per KCR, the creation of a DPE or a DSE starts at the KCR level with the selection of the Surveillance Category data field (**Figure 9.1**).



The image shows a screenshot of a web form. It contains two rows of input fields. The first row is labeled "(M) Surveillance Category:" followed by a dropdown menu with "Deliverable Product Evaluation" selected. Below this is the word "Or". The second row is also labeled "(M) Surveillance Category:" followed by a dropdown menu with "Deliverable Service Evaluation" selected. The entire form is enclosed in a thin black border.

Figure 9.1

Once the Record type has been established (within the KCR), a Record may be created one of two ways: traditionally or On-Demand.

Traditional Records are generated through the population of occurrences on the Scheduler. Select the “New” button to begin the creation of a draft DPE/DSE Record.

On-Demand Records are created through the Surveillance Records area of the Records Page. After locating the desired KCR for which the Record needs to be created and selecting the “Year/Total Records” hyperlink, click the “Create An On-Demand Record” button to open the draft creation of the On-Demand Record for a DPE/DSE.

- When an Associated KCR is marked complete, the line item of the KCR will be grayed out, and the KCR will be moved to the bottom of the table's display (see **Figure 9.3**).
- In such instances where a KCR is no longer Warranted, the line item of the KCR will be grayed out.
- KCRs may be removed by selecting the corresponding box under "Delete" and selecting the "Delete" button.
- A completed KCR may be removed from the Associated KCR table display list, but it cannot be added.
- **Figure 9.3** shows a display of the Associated KCR table.
- Though the Associated KCR table can accommodate multiple selections, it will be hidden until a KCR is applied.

Associated KCR's: 0021 1041 KCR-AO-0001 - Ground and Flight Risk Add KCR

Associated KCRs				
KCR UID	KCR# & Description	KCR Event	KCR Activity	Delete
0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	N/A	<input type="checkbox"/>

Figure 9.3

- **FS Email:** Taken from the users' profile, this is the Email address of the assigned Functional specialist who will be conducting the surveillance.
- **FS Phone:** Taken from the users' profile, this is the phone number of the assigned Functional Specialist who will be conducting the surveillance.
- **FS User Id:** The User ID of the assigned Functional Specialist who will be conducting the surveillance (*generally the first initial of the users first name, followed by the first 4 letters of the last name, sometimes ending in a number*).
- **KCR UID:** The 8-digit unique identifier of the KCR for which the Record is associated with.
- **KCR # & Description:** The KCR# and Description established and pulled from the KCR.
- **LOD RCN:** Record Control Number of the Incoming LOD associated to the KCR.
- **LOD DCN:** Document Control Number of the Incoming LOD associated to the KCR.
- **Delegator CAGE:** CAGE Code with the associated incoming LOD RCN/DCN from the KCR.
- **Record UID:** The 13-digit unique identifier of the Record. The Record UID will automatically generate when the Record is saved.
 - **Record UID Format:**
Plan's Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
Example: PDREP - 0622 - 0001
- **Surveillance Activity:** The Surveillance Activity established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **Surveillance Event:** The Event established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Event in the KCR.
- **Surveillance Location:** Restricted to a single selection, this dropdown displays the associated KCR location(s) as established in the KCR.
- **Surveillance Plan For:** The CAGE Code and Company Name of the contractor to whom the Surveillance Plan is attributed.
- **Surveillance Sub-Activity:** The Surveillance Sub-Activity established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Sub-Activity in the KCR.

Associated Table Columns for **Figure 9.3**

- **KCR Activity:** The Activity of the Associated KCR for which the Record Owner is also an assigned FS. The field will display as “N/A” when lacking a Surveillance Activity in the KCR.
- **KCR Event:** The Event of the Associated KCR for which the Record Owner is also an assigned FS. The field will display as “N/A” when lacking a Surveillance Event in the KCR.
- **KCR UID:** The 8-digit unique identifier of the Associated KCR for which the Record Owner is also an assigned FS.
- **KCR# & Description:** The KCR# and Description of the Associated KCR for which the Record Owner is also an assigned FS.

Associated Button Functionality for **Figure 9.3**

- **Add KCR:** Applies the selected KCR to the Associated KCR table.
- **Add/View Attachments:** This button opens to the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the Record being worked.
- **Back:** Returns the display to the previous page.
- **Delete:** Removes the Associated KCR from the Table and reapplies to the Associated KCR dropdown. Action occurs when the corresponding box is selected and the “Delete” button is clicked.
- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected a warning will populate notifying the user the Record is about to be marked as “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.
 - Please note each Plan, Record and IDR has its own space for Attachments. This means applied documents are exclusive to the location they were applied and will not populate elsewhere.
- **Send Message for Review:** Saves the Record as a draft status before opening the Correspondence Page. After the refresh, messages may be sent to other Surveillance Plan users.

9.2.2 Applicable End Items (DPE/DSE)

Figure 9.4 shows the default view of the Applicable End Item NSN/Part/Serial Numbers section. The End Item dropdown list populates End Items added to the Surveillance Plan and located on the KTR Details Page. For Records associated with Quality Assurance KCRs, a minimum of one End Item must be applied to complete the DPE.

The screenshot shows a web form titled "Applicable End Item NSN/Part/Serial Numbers". At the top left, there is a dropdown menu labeled "End Items:" with "<SELECT>" selected. Below this are three input fields: "*Part Number/Unique Identifier:", "*Serial Number:", and "*Product/Service Description:". To the right of the "Product/Service Description" field are two buttons: "Add End Item" and "Add All". At the bottom of the form is a large text area labeled "Applicable End Item(s):". To the right of this text area are two buttons: "Edit Selected" and "Remove Selected".

Figure 9.4

Select a corresponding End Item from the dropdown provided. After the page refresh, *Part Number/Unique Identifier, *Serial Number and* Product/Service are auto populated with values from the KTR Details page. An example of this is shown on **Figure 9.5**.

Figure 9.5

Though the three text fields automatically populate content entered at the KTR Details Page, these identifying fields of the End Item selected may be edited or added to without altering the sourced content. **Figure 9.6** displays the pulled content from **Figure 9.5** as well as additional text added at the Record level.

Figure 9.6

When applied to the Applicable End Item(s) list box, the three identifying fields (Part Number/Unique Identifier, Serial Number and Product/Service Description) will display the contents of the KTR first, followed by a line of distinction and then entries made at the Record. An example of this is shown in **Figure 9.7** with content from **Figure 9.5** and **Figure 9.6**.

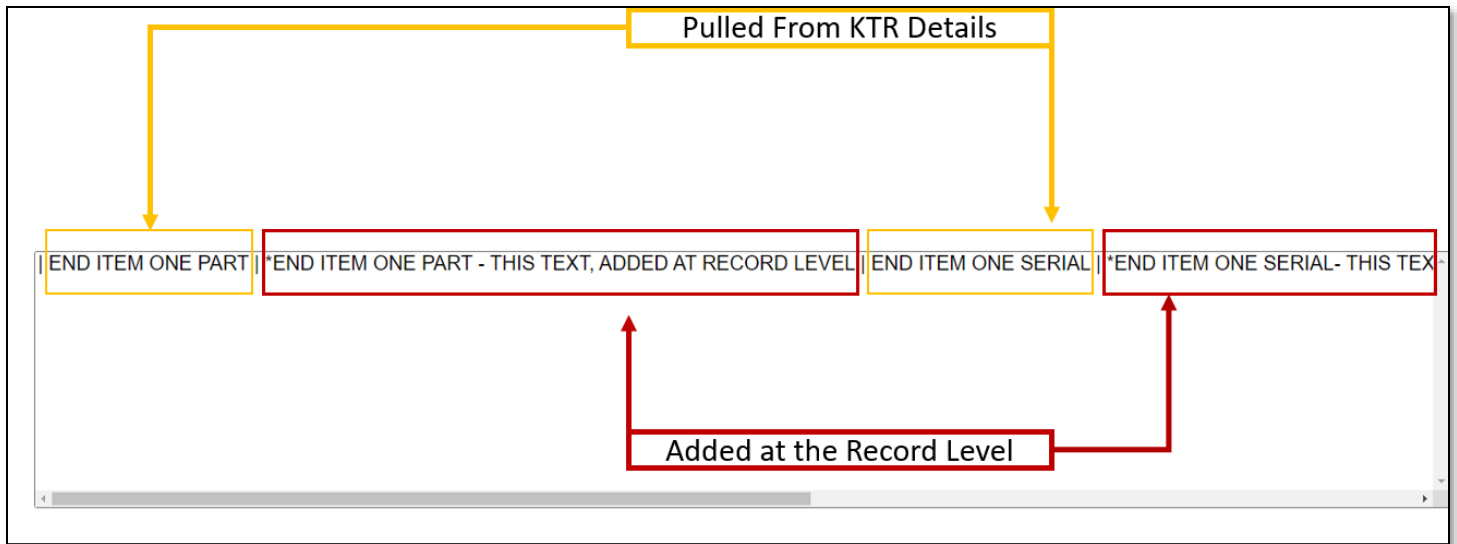


Figure 9.7

Select the “Add End Item” button to apply End Item selection along with additional text to the Applicable End Item(s) list box as seen in **Figure 9.8**.

The screenshot shows the 'Applicable End Item NSN/Part/Serial Numbers' form. At the top is a dropdown menu for 'End Items' with '<SELECT>' selected. Below are three text input fields: '*Part Number/Unique Identifier:', '*Serial Number:', and '*Product/Service Description:'. To the right of these fields are 'Add End Item' and 'Add All' buttons. Below the input fields is a list box labeled 'Applicable End Item(s):' containing the same four items as in Figure 9.7. To the right of the list box are 'Edit Selected' and 'Remove Selected' buttons.

Figure 9.8

Associated Data Fields for Figure 9.8

- **Applicable End Item(s):** List box containing the End Items selected as Applicable to the Record being worked.
- **End Items:** Dropdown list comprised of End Items located on the KTR Details page. Field will be blank when the KTR lacks an End Item.
- ***Part Number/Unique Identifier:** Pulls Part Number/Unique Identifier content from the KTR Details page that may be edited or removed at the Record level. Asterisk (*) denotes content established at the Record level. Field will be blank when the End Item lacks a Part Number/Unique Identifier in the KTR (*max of 75 characters*).
- ***Product/Service Description:** Pulls Product/Service Description content from the KTR Details Page that may be edited or removed at the Record level. Asterisk (*) denotes content established at the Record level. Field will be blank when the End Item lacks a Product/Service Description in the KTR (*max of 200 characters*).

- ***Serial Number:** Pulls Serial Number content from the KTR Details Page that may be edited or removed at the Record level. Asterisk (*) denotes content established at the Record level. Field will be blank when the End Item lacks a Serial Number in the KTR (*max of 1,000 characters*).

Associated Button Functionality for **Figure 9.8**

- **Add All:** This button adds the listed End Items displayed in the dropdown to the Applicable End Item(s) list box. When used, the End Items dropdown list will be empty.
- **Add End Item:** This button adds the selected End Item, along with Record level text, to the Applicable End Item(s) list box. When applied, the selected End Item will no longer populate in the dropdown.
- **Edit Selected:** This button opens the selected End Item to an editable display. The “Update End Item” button must be used to apply the End Item back to the list box.
- **Remove Selected:** Removes the selected item from the Applicable End Item(s) text box and returns it to the End Item dropdown.
- **Update End Item:** This button takes the place of the “Add End Item” button when an applied End Item is being edited. When used, the selected End Item being edited will be applied to the Applicable End Item(s) list box.

9.2.3 Applicable Programs (DPE/DSE)

Figure 9.9 shows the default view of the Applicable Programs section. The Program Name dropdown list populates Programs added to the Surveillance Plan.

Figure 9.9

Select a corresponding Program from the dropdown provided as shown in **Figure 9.10**. Click the “Add Program” button to apply selection to the Applicable Program(s) list box.

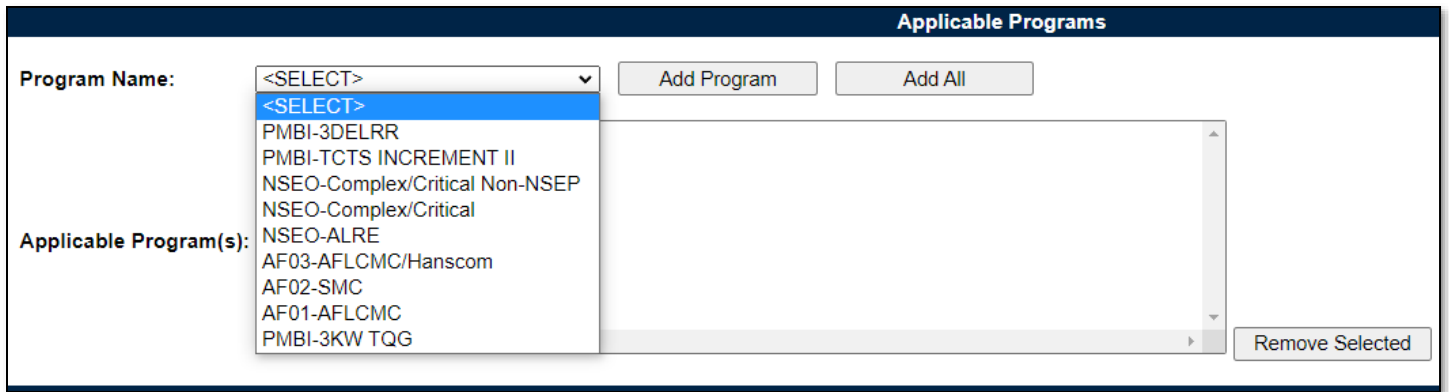


Figure 9.10

The “Add All” button applies all Programs listed in the dropdown to the Applicable Programs(s) list box. When used, the page will refresh with the contents of the dropdown displaying in the list box and the Program Name dropdown empty. An example of this can be seen in **Figure 9.11**.

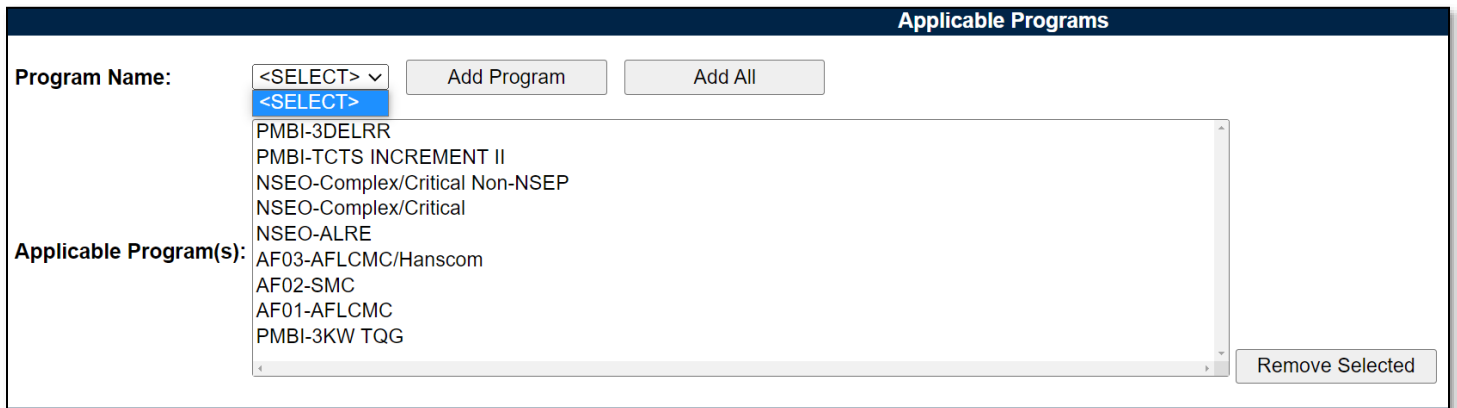


Figure 9.11

Associated Data Fields for **Figure 9.11**

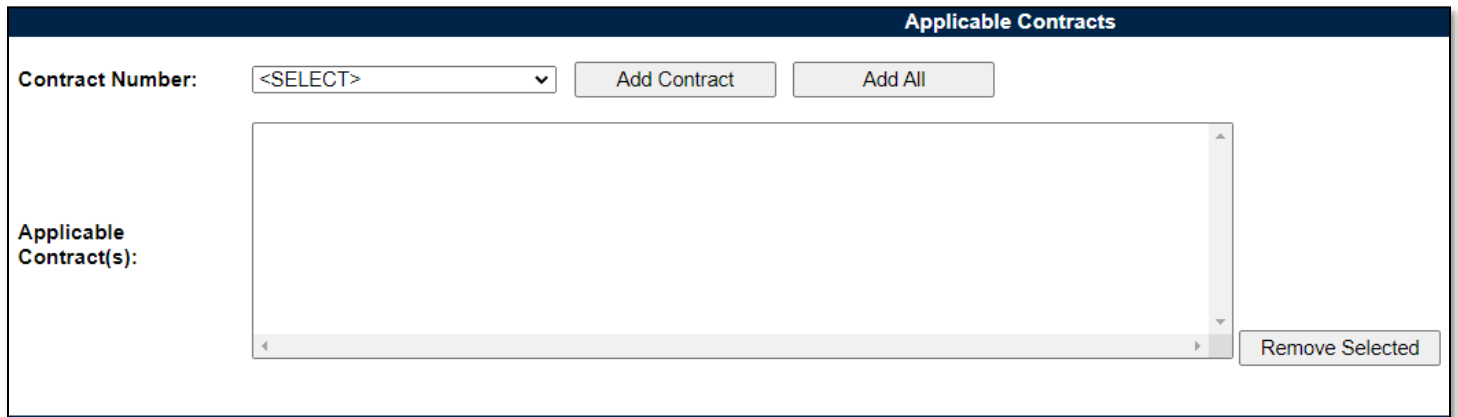
- **Applicable Program(s):** List box containing the Programs selected as Applicable to the Record being worked.
- **Program Name:** Dropdown list comprised of Programs housed within the KTR Details. Archived Programs will not populate in the dropdown.

Associated Button Functionality for **Figure 9.11**

- **Add All:** This button adds the listed Programs displayed in the dropdown to the Applicable Program(s) list box. When used, the Program Name dropdown list will be empty.
- **Add Program:** This button adds the selected Program to the Applicable Program(s) list box. When applied, the selected Program will no longer populate in the dropdown.
- **Remove Selected:** Removes the selected item from the Applicable Program(s) list box and returns it to the Program Name dropdown.

9.2.4 Applicable Contracts (DPE/DSE)

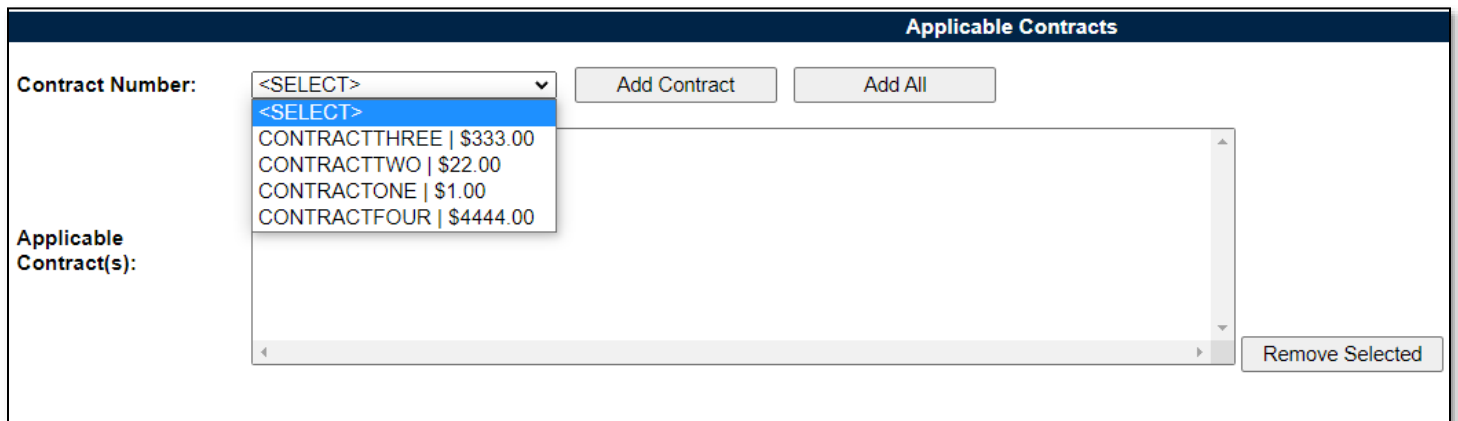
Figure 9.12 shows the default view of the Applicable Contracts section. The Contract Number dropdown list populates Contracts added to the Surveillance Plan.



The screenshot shows a web interface titled "Applicable Contracts". At the top, there is a "Contract Number:" label followed by a dropdown menu currently showing "<SELECT>". To the right of the dropdown are two buttons: "Add Contract" and "Add All". Below this is a large, empty list box labeled "Applicable Contract(s):". To the right of the bottom of this list box is a "Remove Selected" button.

Figure 9.12

Select a corresponding Contract from the dropdown provided as shown in **Figure 9.13**. Click the “Add Contract” button to apply selection to the Applicable Contract(s) list box.



The screenshot shows the same "Applicable Contracts" interface as Figure 9.12, but with the "Contract Number:" dropdown menu open. The dropdown list contains the following items: "<SELECT>", "CONTRACTTHREE | \$333.00", "CONTRACTTWO | \$22.00", "CONTRACTONE | \$1.00", and "CONTRACTFOUR | \$4444.00". The "Add Contract" and "Add All" buttons are still visible to the right of the dropdown. The "Applicable Contract(s):" list box remains empty, and the "Remove Selected" button is still present at the bottom right.

Figure 9.13

The “Add All” button applies the Contracts listed in the dropdown to the Applicable Contract(s) list box. When used, the page will refresh with the contents of the dropdown displaying in the list box with the Contract Number dropdown empty. An example of this can be seen in **Figure 9.14**.

The screenshot shows a web interface titled "Applicable Contracts". At the top left, there is a "Contract Number:" label next to a dropdown menu. The dropdown menu is open, showing a list of four contract entries: "CONTRACTTHREE | \$333.00", "CONTRACTTWO | \$22.00", "CONTRACTONE | \$1.00", and "CONTRACTFOUR | \$4444.00". To the right of the dropdown are two buttons: "Add Contract" and "Add All". Below the dropdown is a large list box labeled "Applicable Contract(s):" which is currently empty. To the right of this list box is a button labeled "Remove Selected".

Figure 9.14

Associated Data Fields for **Figure 9.14**

- **Applicable Contract(s):** List box containing the Contracts selected as Applicable to the Record being worked.
- **Contract Number:** Dropdown list comprised of Contracts housed within the KTR Details. Archived Contracts will not populate in the dropdown.

Associated Button Functionality for **Figure 9.14**

- **Add All:** This button adds the listed Contracts displayed in the dropdown to the Applicable Contract(s) list box. When used, the Contract Number dropdown list will be empty.
- **Add Contracts:** This button adds the selected Contracts to the Applicable Contract(s) list box. When applied, the selected Contract will no longer populate in the dropdown.
- **Remove Selected:** Removes the selected item from the Applicable Contract(s) list box and returns it to the Contract Number dropdown.

9.2.5 KTR Information (DPE/DSE)

Figure 9.15 shows a dropdown of available POCs who have been added to the KTR Details page. This is where the Record houses the point(s) of contact for the KTR.

The screenshot shows a web interface titled "KTR Information". It contains a single dropdown menu with the label "(CM) KTR_POC|KTR Title:" and a selection option "<SELECT>".

Figure 9.15

In the conclusion section, if the Evaluation Result is 'Un-Satisfactory', then the KTR POC selection is required. If no KTR POC is available, the user must go back to the KTR Details page and enter at least one KTR POC.

9.2.6 Associated IDRs (DPE)

Figure 9.16 shows the default view of the Associated IDRs section. This area is exclusive to System/Progress Evaluation Records for Quality Assurance KCRs. This is where IDRs are created and housed for the associated SPE Record. The figures and explanations of this section serve as an overview of the IDR area outside of the Inspection.

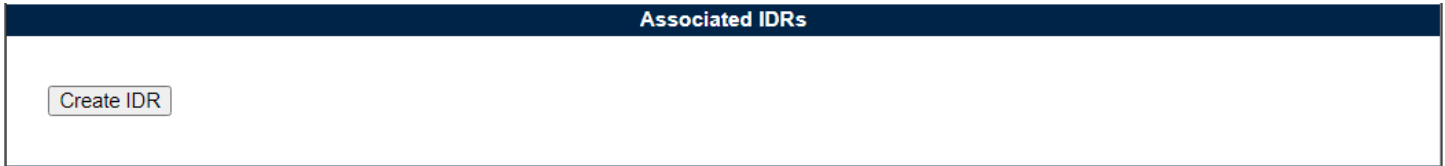


Figure 9.16

An Inspection Detail Report is initiated when the “Create IDR” button is selected. After the page refresh, the pending draft IDR is displayed. The IDR will remain in a pending draft status until the Inspection is registered as a Draft IDR through the “Save” action or is expunged by exiting the page before the “Save” button is used. Once saved, the IDR will populate in the Associated IDR table as seen in **Figure 9.17**. A minimum of one completed IDR must be applied to the Record to complete the DPE.

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

The screenshot shows a dark blue header with the text 'Associated IDRs'. Below the header is a white rectangular area containing a 'Create IDR' button and a table. The table has the following columns: IDR UID, Last Updated Date, Functional Specialist, Status, Actual Hours, Reassign/Reopen, Delete, and Attachments. There is one row of data.

IDR UID	Last Updated Date	Functional Specialist	Status	Actual Hours	Reassign/Reopen	Delete	Attachments
PDREP-0224-0004-001	02/08/2024 08:32:02 AM	SP USER (ALPHA) GUIDE	Draft	10.00	Reassign	Delete	Attachments(0)

Figure 9.17

Associated Table Columns for **Figure 9.17**

- **Actual Hours:** Display of the Actual Hours entered within the Record.
- **Functional Specialist:** Also known as the “Record Owner”, is the Functional Specialist responsible for the IDR. Automatically generated by the users’ profile.
- **Last Updated Date:** The date the IDR was last updated based on the “Save” action.
- **IDR UID:** The 16-digit unique identifier of the Inspection Detail Report. The IDR UID is an extension of the Record UID by three digits and displays the sequence for which it was created (beginning with 001). This number automatically generates after the IDR is saved.
 - **Record UID Format:**
 - Plan’s Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
 - *Example: PDREP - 0622 – 0001*
 - **IDR UID Format:**
 - Record UID + 3-digit sequential number of populations starting at 001.
 - *Example: PDREP - 0622 - 0001 - 001*
- **Status:** The status (*Draft/Complete*) of the IDR.

- **Attachments (#):** This hyperlink opens to the “Upload Attachment(s)” page and allows users to upload, view, and delete attachments related to that of the IDR being worked. The number exhibited in parentheses indicates the number of attachments associated with the IDR. This number does not take into consideration attachments made to the Plan, Records, or other IDRs. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.
- **Create IDR:** Initiates creation of the Inspection Detail Report.
- **Delete:** The ability to delete an IDR is restricted by a user’s access level as well as their Team Code and the IDR status. The Delete column populates for those users with an access level of Supervisor or higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). The ability to delete an IDR is dependent upon the IDR being in a draft status. The “Delete” button’s functionality is restricted to those IDRs marked as “Complete” and will display as grayed/disabled in such instances.
 - Once the IDR has been completed (IDR Status=Complete), the ability to delete will be removed.
 - To delete an IDR, select the “Delete” button associated with the IDR to be expunged. A pop-up message will display requesting confirmation of the delete request.
 - i. **OK:** Captures the request and eliminates the IDR and its contents.
 - ii. **Cancel:** Refreshes the page, clears the delete request, and returns to the top of the Record.
- **IDR UID:** The unique identifier of the IDR. When selected this hyperlink will open the IDR to the appropriate display per the user selecting it (draft for the Record Owner & view for all other users).
- **Reassign/Reopen:** The Reassign/Reopen column displays either one button or the other depending on the IDR status. The Reassign button populates when the IDR is in a draft status, while “Reopen” displays for completed IDR’s. This column only populates for users with Supervisor or higher access. Button functionality is enabled for users of the same Team Code as the Record Owner.
 - To Reopen or Reassign an IDR, start by clicking the associated button for the IDR to be Reopened or Reassigned. A pop-up message will display requesting confirmation of the Reopen/Reassign request.
 - i. **OK:** Captures the request and Reopens or Reassigns the IDR.
 - ii. **Cancel:** Refreshes the page, clears the Reopen/Reassign request and returns to the top of the Record.

9.2.7 Evaluation (DPE/DSE)

Figure 9.18 shows the default view of the Evaluation section. This area is excluded from Deliverable Product Evaluation Records for Quality Assurance KCRs and is located within the associated IDR.

The screenshot shows a form titled "Evaluation" with the following fields and options:

- (M) Evaluation Item: Text box containing "TEST"
- (M) Requirement Reference: Text box containing "TEST"
- (M) Evaluation Criteria: Text box containing "TEST"
- (M) Surveillance Technique(s): A grid of checkboxes for:
 - Examine, Monitor, Analyze, Validate
 - Inspect, Observe, Forecast, Verify
 - Interview, Test, Reconcile
 - Measure, Witness, Trend
- Remote Surveillance:
- Virtual Surveillance:

Figure 9.18

Associated Data Fields for **Figure 9.18**

- **(M) Evaluation Criteria:** A text box used to enter the evaluation criteria for the Record being worked (*max of 3,000 characters*).
- **(M) Evaluation Item:** A text box used to describe the item being evaluated for the Record being worked (*max of 3,000 characters*).
- **Remote Surveillance:** Check box identifying if the surveillance was remote.
- **(M) Requirement Reference:** A text box used to enter requirement references for the Record being worked (*max of 3,000 characters*).
- **(M) Surveillance Techniques:** Check boxes used to identify surveillance techniques used. A minimum selection of one is required to mark the Record "Complete".
- **Virtual Surveillance:** Check box identifying if the surveillance was virtual.

9.2.8 Conclusion (DPE/DSE)

Figure 9.19 shows the default view of the Conclusion section. This is where the Records' findings are entered.

The screenshot shows a form titled "Conclusion" with the following fields and buttons:

- (M) Evaluation Result: Dropdown menu with "Satisfactory" selected
- (M) Assess Risk: Dropdown menu with "No Change" selected
- (M) Action Taken: Dropdown menu with "No Change" selected
- (M) Results: Text box containing "TEST"
- (M) Actual Hours: Input field with "23" and a dropdown with ".00"
- (M) Completion Date: Calendar icon
- Status: Dropdown menu with "Draft" selected
- Buttons: Back, Save, Add/View Attachments, Send Message for Review

Figure 9.19

- **(M) Action Taken:** A determination by the Record Owner as to what (if any) action is to be taken. A selection of “Increase Surveillance”, “Decrease Surveillance” or “No Change” is made through the dropdown provided.
- **(M) Actual Hours:** Two fields used to enter the number of hours it took to conduct the surveillance as entered by the Record Owner. 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”.

IDR Actual minute(s) dropdown values:

- .00 = On the hour
 - .25 = Quarter Past the hour
 - .50 = Half past the hour
 - .75 = Quarter until the next hour
- **(M) Assess Risk:** Assessment of the current Risk by the Record Owner. A selection of “Increase Risk”, “Decrease Risk” or “No Change” is made through the dropdown provided. When “Increase Risk” or “Decrease Risk” is selected, the “Update KCR Risk” button populates as seen in **Figure 9.20**. By clicking on the “Update KCR Risk” button, the Record is automatically saved (draft status), while the user is navigated to the associated KCR’s editable view with Record locking active.

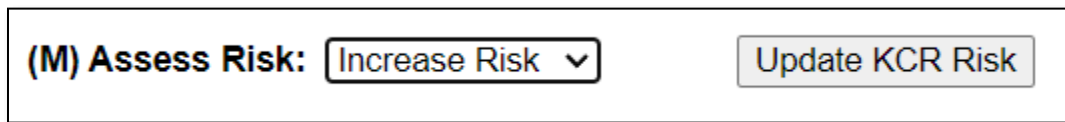


Figure 9.20

- **(M) Completion Date:** A field used to Record the date the surveillance was completed. A future Completion Date may be used while the Record is in a “Draft” status. However, a Completion Date less than or equal to “today’s date” is required before the Record can be marked “Complete”.
- **(M) Evaluation Results:** Results of the evaluation as determined by the Record Owner. A selection of “Satisfactory” or “Un-Satisfactory” is made through the dropdown provided.
- **(M) Results:** A text box to describe the results of the inspection (*max of 100 characters*).
- **Status:** The present status (*Draft/Complete*) of the Record. This dropdown defaults to a “Draft” status. When a user indicates the Record is complete, they will select “Complete” from the dropdown and click the “Save” button to capture their entry.
 - When the “Save” button is selected, a warning will populate notifying the user the Record is about to be marked as “Complete” and will no longer be editable (see **Figure 9.21**).
 - **OK:** Captures the request and marks the Record “Complete” when all mandatory fields have been satisfied. If not, an error message is generated at the top of the Record.
 - **Cancel:** Refreshes the page, clears the request to Complete the Record and returns to the top of the page.

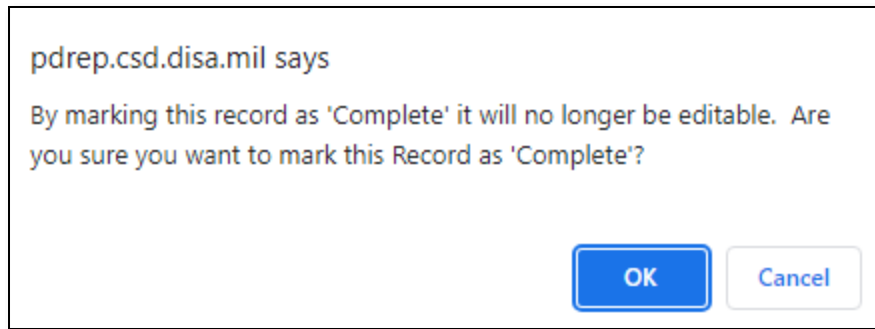


Figure 9.21

Associated Button Functionality for Figure 9.19

- **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 Record 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 were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected, a warning will populate notifying the user the Record is about to be marked “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.
- **Send Message for Review:** Saves the Record in a draft status before opening to the correspondence page.
- **Update KCR Risk:** Navigates the user to the associated KCR for a Risk reassessment. When the “Update KCR Risk” button is used, the Record is automatically saved (draft status) while the user is navigated to the associated KCR’s editable view (with Record locking active).

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

10 DPE IDR

Deliverable Product Evaluation (DPE) Inspection Detail Reports (IDR) are attributed to those KCRs designated as Quality Assurance (NASA, NSEO & QA). For a DPE to be marked “Complete”, the Record must contain a minimum of one completed IDR.

10.1 Creating an IDR for DPE

Figure 10.1 shows the default view of the Associated IDRs section within the DPE. This section is only displayed on DPEs that have a KCR with a designated Functional Area of NASA, NSEO or Quality Assurance.



Figure 10.1

An Inspection Detail Report is initiated when the “Create IDR” button is selected. After the page refresh, the pending draft IDR displays. The IDR will remain in a pending draft status until the Inspection is either registered as a “Draft” through the “Save” action or is expunged by exiting the page before the “Save” button is used. Once saved, the IDR will display within the Associated IDR table located on the DPE Record. A minimum of one completed IDR must be applied to a DPE Record to mark the Record “Complete”.

Associated Button Functionality for **Figure 10.1**

- **Create (IDR):** This button processes the request to create a new IDR associated with the DPE Record. Once a Record has been generated and saved (draft status), a line item will appear on the IDR table (**Figure 10.2**).

10.2 Record (IDR for DPE)

10.2.1 Details (IDR for DPE)

Figure 10.2 shows the Details section of a DPE: IDR. This area will duplicate the higher-level DPE Record (also known as the “Parent Record”).

Inspection Details Report (IDR) for Deliverable Product Evaluation (DPE)

Instructions
 (M) Mandatory Field
 (CM) Conditional Mandatory Field
 1. Enter/modify mandatory field(s)
 2. Enter/modify additional information if available
 3. To save the record, click **Save**
 4. To cancel the process or go back, click **Back**
 5. Correct format for Date Elements is MM/DD/YYYY or use Calendar
 6. To add or view attachments click **Add/View Attachment**

Assigned FS: _____ **FS User Id:** _____ **FS Email:** _____ **FS Phone:** _____

IDR UID: PDREP-0224-0004-001
Record UID: PDREP-0224-0004
KCR UID: 0021 1040

Surveillance Plan For: PDREP - PDREP CO
Assigned Functional Area: NSEO Quality Assurance
KCR# & Description: KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP
Surveillance Event: Oversight IAW NNPP FSIP Located in Cipher share
Surveillance Activity: N/A
Surveillance Sub-Activity: N/A
LOD RCN: N/A
LOD DCN: N/A
Delegator CAGE: N/A
Surveillance Location: EGRESS SHOP
Alternate Address: N/A

Figure 10.2

Associated Data Fields for **Figure 10.2**

- **Alternate Address:** Open text box for entering an alternate address (*max of 75 characters*).
- **Associated KCRs:** Display listing other KCR UID, KCR# & Description(s) for which the Record Owner is also an assigned FS.
- **Assigned FS:** Also known as the “Record Owner”, is the Functional Specialist responsible for the IDR. Automatically generated by the users’ profile.

- **Assigned Functional Area:** The Functional Area established and pulled from the KCR.
- **Delegation Number:** Text box to enter the LOD RCN.
- **FS Email:** Taken from the users' profile, the Email address of the assigned Functional specialist who will be conducting the inspection.
- **FS Phone:** Taken from the users' profile, the phone number of the assigned Functional Specialist who will be conducting the inspection.
- **FS User Id:** The User ID of the assigned Functional Specialist who will be conducting the inspection (*generally, it is the first initial of the users first name followed by the first 4 letters of the last name, sometimes ending in a number*).
- **KCR UID:** The 8-digit unique identifier of the KCR associated to the DPE Record.
- **KCR # & Description:** The KCR# and Description established and pulled from the KCR.
- **LOD RCN:** Record Control Number of the Incoming LOD associated to the KCR.
- **LOD DCN:** Document Control Number of the Incoming LOD associated to the KCR.
- **Delegator CAGE:** CAGE Code with the associated incoming LOD RCN/DCN from the KCR.
- **IDR UID:** The 16-digit unique identifier of the Inspection Detail Report. The IDR UID is an extension of the Record UID by three digits and displays the sequence for which it was created (beginning with 001). This number automatically generates after the IDR is saved.
 - **Record UID Format:**
 - Plan's Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
 - *Example: PDREP - 0622 – 0001*
 - **IDR UID Format:**
 - Record UID + 3-digit sequential number of populations starting at 001.
 - *Example: PDREP - 0622 - 0001 - 001*
- **Record UID:** The 13-digit unique identifier pulled from the DPE Record.
- **Surveillance Activity:** The Surveillance Activity established and pulled from the KCR. The field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **Surveillance Event:** The Event established and pulled from the KCR. The field will display as "N/A" when lacking a Surveillance Event in the KCR.
- **Surveillance Location:** Displays the associated KCR location(s) as established in the KCR and selected in the DPE Record.
- **Surveillance Plan For:** The CAGE Code and Company Name of the contractor to whom the Surveillance Plan is attributed.
- **Surveillance Sub-Activity:** The Surveillance Sub-Activity established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Sub-Activity in the KCR.

Associated Button Functionality for **Figure 10.2**

- **Add/View Attachments:** This button opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the IDR 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 were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the "Save" button is selected, a warning will populate notifying the user the IDR is about to be marked as "Complete" and will no longer be editable. A selection of "OK" or "Cancel" will need to be used to clear the pop-up.

10.2.2 **Applicable End Item (IDR for DPE)**

Figure 10.3 shows the default view of the Applicable End Item NSN/Part/Serial Numbers section. The End Item dropdown list populates End Items selected at the DPE Record Level. A minimum of one End Item must be applied to complete the IDR.

Applicable End Item NSN/Part/Serial Numbers

(M) End Items: -SELECT-

*Part Number/Unique Identifier:

*Part Number/Unique Identifier:

*Serial Number:

**Serial Number:

*Product/Service Description:

**Product/Service Description:

Refresh Product Characteristics From SP

Figure 10.3

Associated Data Fields for **Figure 10.3**

- **(M) End Item:** Restricted to one selection. This dropdown populates those End Items as selected in the DPE. Selection will display values entered on the DPE for Part Number/Unique Identifier and Serial Number fields as shown in **Figure 10.3**.
- ***Part Number/Unique Identifier:** Auto-populated display based on what resides at the DPE Record level for Part Number/Unique Identifier. Asterisk (*) denotes content established at the Record Level. This field will be blank when the End Item lacks a Part Number/Unique Identifier in the DPE.
- ****Part Number/Unique Identifier:** Text box to enter additional Part Number/Unique Identifier for the IDR level (*max of 75 characters*).
- ***Product/Service Description:** Auto-populated display based on what resides at the DPE Record Level for Product/Service Description. Asterisk (*) denotes content established at the Record Level. Field will be blank when the End Item lacks a Product/Service Description in the DPE.
- ****Product/Service Description:** Text box to enter additional Product/Service Description for the IDR level (*max of 200 characters*).
- ***Serial Number:** Auto-populated display based on what resides at the DPE Record Level for Serial Number. Asterisk (*) denotes content established at the Record Level. Field will be blank when the End Item lacks a Serial Number in the DPE.
- ****Serial Number:** Text box to enter additional Serial Number for the IDR Level (*max of 1,000 characters*).

Note: Single asterisk indicates Record Level whereas double asterisk denotes IDR level. An example of this may be seen in **Figure 10.4**.

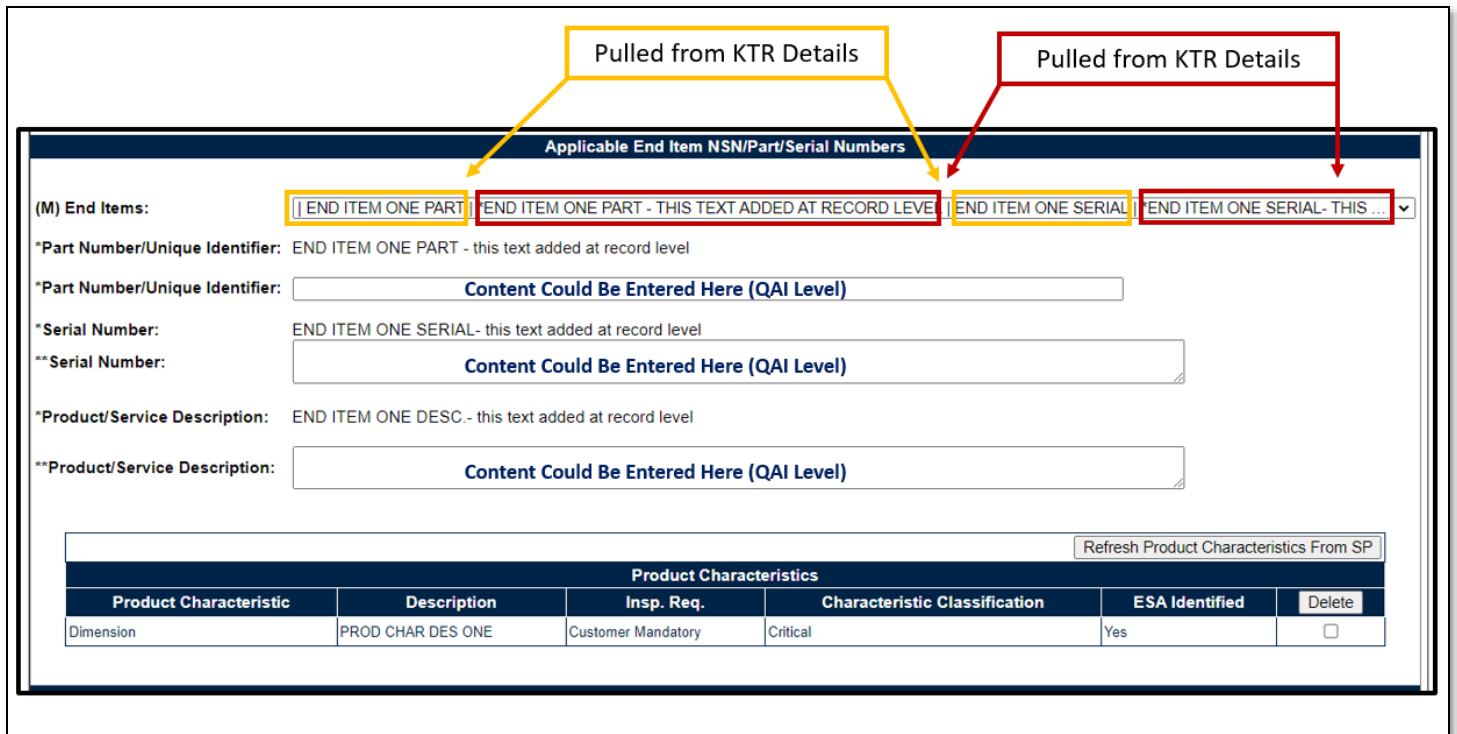


Figure 10.4

10.2.3 Product Characteristics (IDR for DPE)

When an End Item contains Product Characteristics and is selected from the dropdown, the associated Product Characteristics Table will display beneath the End Item identifier fields of Part Number/Unique Identifier, Serial Number & Product/Service Description.

Associated Table Columns for Figure 10.4

- **Characteristic Classification:** Auto-populated display based on the selection made for the End Item's Characteristic Classification dropdown located on the KTR Details page. This field will be blank when the End Item lacks a Characteristic Classification.
- **Description:** Auto-populated display based on the contents entered for the End Item's Description text box located on the KTR Details page. This field will be blank when the End Item lacks a Description.
- **ESA Identified:** Auto-populated display based on the selection made for the End Item's ESA Identified dropdown located on the KTR Details page. This field will be blank when the End Item lacks an ESA Identified.
- **Insp. Req.:** Auto-populated display based on the selection made for the End Item's Insp. Req. dropdown located on the KTR Details page. Field will be blank when the End Item lacks an Insp. Req.
- **Product Characteristics:** Auto-populated display based on the selection made for the End Item's Product Characteristic dropdown located on the KTR Details page. This field will be blank when the End Item lacks a Product Characteristic.

Associated Button Functionality for Figure 10.4

- **Delete:** Removes the selected Product Characteristic from the Product Characteristic Table. This action occurs when the corresponding box is selected and the “Delete” button is clicked. A pop-up message will display requesting confirmation of the delete request as seen in **Figure 10.5**.
 - **OK:** Captures the request and eliminates the Product Characteristic from the table.
 - **Cancel:** Refreshes the page and clears the delete request.

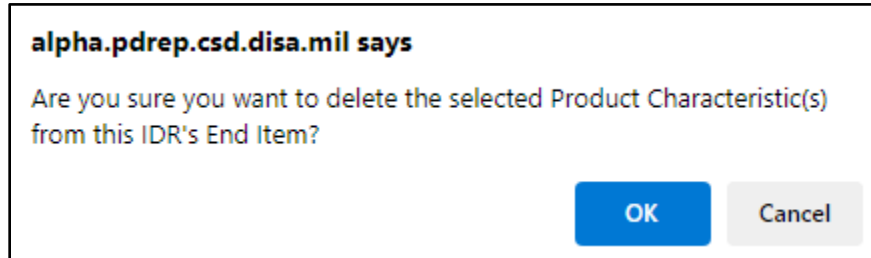


Figure 10.5

- **Refresh Product Characteristic Table:** This button refreshes the Product Characteristic Table to match that of the KTR Details Product Characteristic Table of the same End Item.

10.2.4 General Information (IDR for DPE)

Figure 10.6 shows the default view of the General Information section for the IDR for DPE.

General Information	
Contract: <input type="text" value="-SELECT-"/>	Contract Line Item/Purchase Order: <input type="text"/>
Material Spec: <input type="text"/>	Manufacturing Spec: <input type="text"/>
Batch/Lot/Heat: <input type="text"/>	Drawing Number: <input type="text"/>

Figure 10.6

Associated Data Fields for **Figure 10.6**

- **Batch/Lot/Heat:** Text box to enter the Batch, the Lot, or the Heat related to the IDR (*max of 50 characters*).
- **Contract:** Restricted to one selection, this dropdown displays Contracts applied to the DPE Record. The dropdown will be blank when a contract has not been applied to the DPE.
- **Contract Line Item/Purchase Order:** Text box to the selected Contract’s Line Item or Purchase Order for the IDR (*max of 50 characters*).
- **Drawing Number:** Text box to enter the Drawing Number related to the IDR (*max of 50 characters*).
- **Manufacturing Spec:** Text box to enter Manufacturing Specifications related to the IDR (*max of 50 characters*).
- **Material Spec:** Text box to enter Material Specifications related to the IDR (*max of 50 characters*).

10.2.5 Inspection Criteria (IDR for DPE)

Figure 10.7 shows the default view of the Inspection Criteria section for the IDR for DPE.

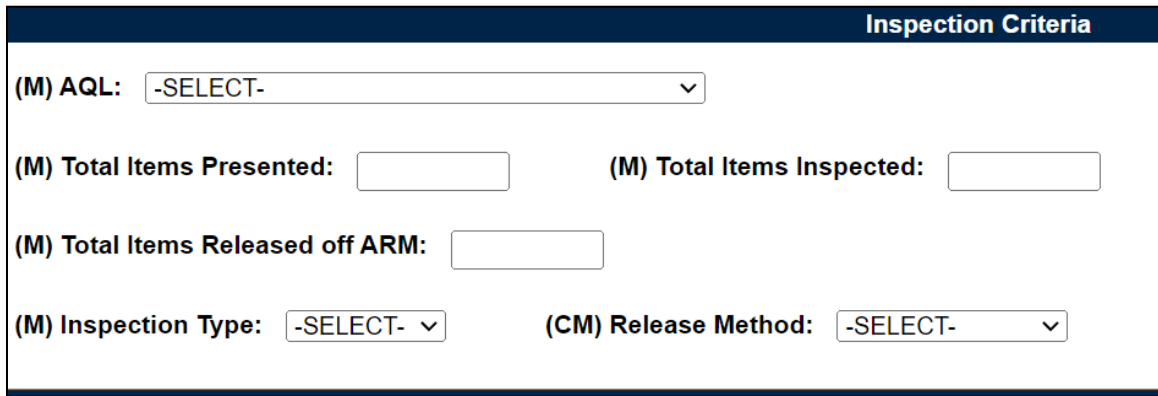


Figure 10.7

Associated Data Fields for Figure 10.7

- **AQL:** Select the applicable AQL from the dropdown provided (Figure 10.8) related to the appropriate level of oversight of a contractor to meet contractual requirements.

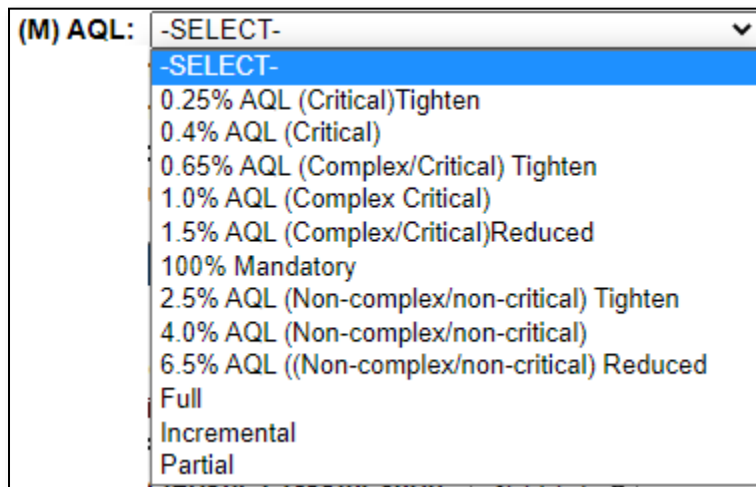


Figure 10.8

- **(M) Inspection Type:** Select the Inspection type (“In-Process” or “Final”) from the dropdown provided. When Inspection Type is “Final”, the Release Method becomes a mandatory data field.
- **(CM) Release Method:** Conditional Mandatory data field. This data field must have an entry when the “(M) Inspection Type” has a selection of “Final”. Selections for release method are:
 - ARP
 - CoC
 - Receiving Report
- **Remote Surveillance:** Check box identifying if the surveillance was remote.

- **(M) Total Items Inspected:** Text box to enter the numeric count of Total Items Inspected for the IDR. Special characters and letters are restricted. This number must be equal to or smaller than the number of “Total Items Presented” (*max of 7 characters*).
- **Total Items Presented:** Text box to enter the numeric count of Total Items Presented for the IDR. Special characters and letters are restricted (*max of 7 characters*).
- **(M) Total Items Released off ARM:** Text box to enter the numeric count of Total Items Released off ARM for the IDR. Special characters and letters are restricted. This number must be equal to or smaller than the number of “Total Items Presented” (*max of 7 characters*).
- **Virtual Surveillance:** Check box identifying if the surveillance was virtual.

10.2.6 Conclusion (IDR for DPE)

Figure 10.9 shows the default view of the Conclusion section for the IDR for a DPE.

Figure 10.9

Associated Data Fields for Figure 10.9

- **(CM) Deficiency(ies) Requiring Corrective Action:** A mandatory text box used to enter comments related to Deficiencies requiring a Corrective Action when Evaluation Results are “Un-Satisfactory” for the IDR being worked (*max of 2,000 characters*).
- **Notes:** Open text box (*max of 3,000 characters*).
- **(M) IDR Actual Hours:** Two fields used to enter the number of hours it took to conduct the inspection as entered by the Record Owner. 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”.

IDR Actual minute(s) dropdown values:

- .00 = On the hour
- .25 = Quarter Past the hour
- .50 = Half past the hour
- .75 = Quarter till the next hour

- **(M) IDR Completion Date:** A field used to Record the date the inspection was completed. A future Completion Date may be used while the IDR is in a “Draft Status”. However, a Completion Date less than or equal to “today’s date” is required before the IDR can be marked “Complete”.

- **(M) IDR Evaluation Results:** Results of the evaluation as determined by the Record Owner. A selection of “Satisfactory” or “Un-Satisfactory” is made through the dropdown provided.
- **IDR Status:** The present status (*Draft/Complete*) of the IDR. This dropdown defaults to a “Draft” status. When a user indicates the IDR is complete, they will select “Complete” from the dropdown and click the “Save” button to capture their entry.
 - When the “Save” button is clicked, a warning will populate notifying the user the IDR is about to be marked as “Complete” and will no longer be editable.
 - **OK:** Captures the request and marks the Record Complete (when all mandatory fields have been satisfied). If not, an error message is generated at the top of the IDR.
 - **Cancel:** Refreshes the page, clears the request to Complete the IDR and returns to the top of the page.

Associated Button Functionality for **Figure 10.9**

- **Add/View Attachments:** This button opens to the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to the IDR 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.
- **Back:** Returns the display to the previous page (DPE Record).
- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected, a warning will populate notifying the user the Record is about to be marked as “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.

11 SPE/PE

System/Process Evaluation (SPE) & Progress Evaluation (PE)

Though System/Process Evaluation (SPE) & Progress Evaluation (PE) share the same display, there are a few differences.

- i. Evaluation Section will be absent for SPEs with IDRs
- ii. Page Title/Header
(states if the Record type is a SPE or a PE)
- iii. SPEs can house IDRs.
(exclusive to Quality Assurance, Aircraft Operations, and Contract Safety KCRs)

11.1 Creating a SPE or PE

Since Record creation is restricted to one Record type, the creation of a SPE or a PE starts at the KCR level with the selection of the Surveillance Category data field (**Figure 11.1**).

(M) Surveillance Category: System / Process Evaluation ▾

Or

(M) Surveillance Category: Progress Evaluation ▾

Figure 11.1

Once the Record type has been established (within the KCR), a Record may be created one of two ways (traditionally or on-demand).

Traditional Records are generated through the population of occurrences on the Scheduler. Select the “New” button to begin the creation of a draft SPE/PE Record.

On-Demand Records are created through the Surveillance Records area of the Records Page. After locating the desired KCR for which the Record needs to be created and selecting the “Year/Total Records” hyperlink, click the “Create An On-Demand Record” button to open the draft creation of the On-Demand Record for a SPE/PE.

11.2 Record (SPE/PE)

11.2.1 Details (SPE/PE)

Figure 11.2 shows the Details section of a SPE/PE Record.

System / Process Evaluation

Instructions
(M) Mandatory Field
(CM) Conditional Mandatory Field
 1. Enter/modify mandatory field(s)
 2. Enter/modify additional information if available
 3. To save the record, click **Save**
 4. To cancel the process or go back, click **Back**
 5. Correct format for Date Elements is MM/DD/YYYY or use Calendar
 6. To add or view attachments click **Add/View Attachment**

Assigned FS: **FS User Id:** **FS Email:** **FS Phone:**

Record UID: 07070-0923-0001
KCR UID: 0013 7659

Surveillance Plan For: 07070 - NAVY UNITED STATES DEPARTMENT OF THE
Assigned Functional Area: Quality Assurance
KCR# & Description: KCR-QA-0008 - Inspection System
Surveillance Event: Metrology
Surveillance Activity: N/A
Surveillance Sub-Activity: N/A
LOD RCN: S0101A202350045
LOD DCN: S5102A230950045
Delegator CAGE: 99999

Surveillance Location: <SELECT> ▾ **Alternate Address:**

Associated KCR's:

0019 4240 KCR-EN-0022-01 - Program Reviews	▲
0019 4286 KCR-CS-0004 - Contractor's Flight and Ground Operations (CS)	▬
0019 4287 KCR-AO-0005 - Contractor's Flight and Ground Operations	▼

Figure 11.2

Associated Data Fields for Figure 11.2

- **Alternate Address:** Open text box for entering an alternate address (*max of 75 characters*).
- **Assigned FS:** Also known as the “Record Owner”, this is the Functional Specialist responsible for the Record and is automatically generated by the users’ profile.
- **Assigned Functional Area:** The Functional Area established and pulled from the KCR.
- **Associated KCRs:** A dropdown listing other KCR UID, KCR# & Description(s) for which the Record Owner is also an assigned FS. This list is restricted to those KCRs within the same Surveillance Plan as the Record being created. When an Associated KCR is selected from the dropdown and the “Add KCR” button is used, the KCR will be added to the Associated KCR Table.
 - Completed KCRs will not display in the dropdown.
 - Dropdown is hidden when all values have been applied to the table.
 - Users may make multi-selections from the dropdown provided.
- **Associated KCR Table:** List of Associated KCRs that have been selected and added to the Record from the Associated KCR dropdown.
 - A completed KCR may be removed from the Associated KCR table display list, but it cannot be added.
 - **Figure 11.3** shows a display of the Associated KCR table.
 - In such instances where a KCR is no longer Warranted, the line item of the KCR will be grayed out.
 - KCRs may be removed by selecting the corresponding box under “Delete” and selecting the “Delete” button.
 - Though the Associated KCR table can accommodate multiple selections, it will be hidden until a KCR is applied.
 - When an Associated KCR is marked complete, the line item of the KCR will be grayed out, and the KCR will be moved to the bottom of the table’s display (see **Figure 11.3**).
- **Delegation Number:** Text Box to enter the LOD RCN.
- **FS Email:** Taken from the users’ profile, this is the Email address of the assigned Functional specialist who will be conducting the surveillance.
- **FS Phone:** Taken from the users’ profile, this is the phone number of the assigned Functional Specialist who will be conducting the surveillance.
- **FS User Id:** The User ID of the assigned Functional Specialist who will be conducting the surveillance (*generally the first initial of the users first name followed by the first 4 letters of the last name, sometimes ending in a number*).
- **KCR UID:** The 8-digit unique identifier of the KCR for which the Record is associated with.
- **KCR # & Description:** The KCR# and Description established and pulled from the KCR.
- **LOD RCN:** Record Control Number of the Incoming LOD associated to the KCR.
- **LOD DCN:** Document Control Number of the Incoming LOD associated to the KCR.
- **Delegator CAGE:** CAGE Code with the associated incoming LOD RCN/DCN from the KCR.
- **Record UID:** The 13-digit unique identifier of the Record. The Record UID will automatically generate when the Record is saved.
 - **Record UID Format:**
 - Plan’s Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
 - *Example: PDREP - 0622 – 0001*

- **Surveillance Activity:** The Surveillance Activity established and pulled from the KCR. This field will display as “N/A” when lacking a Surveillance Activity in the KCR.
- **Surveillance Event:** The Event established and pulled from the KCR. This field will display as “N/A” when lacking a Surveillance Event in the KCR.
- **Surveillance Location:** Restricted to a single selection, this dropdown displays the associated KCR location(s) as established in the KCR.
- **Surveillance Plan For:** The CAGE Code and Company Name of the contractor to whom the Surveillance Plan is attributed.
- **Surveillance Sub-Activity:** The Surveillance Sub-Activity established and pulled from the KCR. This field will display as “N/A” when lacking a Surveillance Sub-Activity in the KCR.

System / Process Evaluation

Instructions
 (M) Mandatory Field
 (CM) Conditional Mandatory Field
 1. Enter/modify mandatory field(s)
 2. Enter/modify additional information if available
 3. To save the record, click **Save**
 4. To cancel the process or go back, click **Back**
 5. Correct format for Date Elements is MM/DD/YYYY or use Calendar
 6. To add or view attachments click **Add/View Attachment**

Assigned FS: **FS User Id:** **FS Email:** **FS Phone:**

(M) On-Demand Start Date:
(M) On-Demand End Date:

Record UID: PDREP-0224-0001
KCR UID: 0021 1039

Surveillance Plan For: PDREP - PDREP CO
Assigned Functional Area: NASA Quality Assurance
KCR# & Description: KCR-NASA-0001 - Packaging, handling, and transportation
Surveillance Event: Cushioning Thickness
Surveillance Activity: N/A
Surveillance Sub-Activity: N/A
LOD RCN: N/A
LOD DCN: N/A
Delegator CAGE: N/A

Surveillance Location: **Alternate Address:**

Associated KCR's:

Associated KCRs				
KCR UID	KCR# & Description	KCR Event	KCR Activity	Delete
0021 1041	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	N/A	<input type="checkbox"/>

Figure 11.3

Associated Table Columns for Figure 11.3

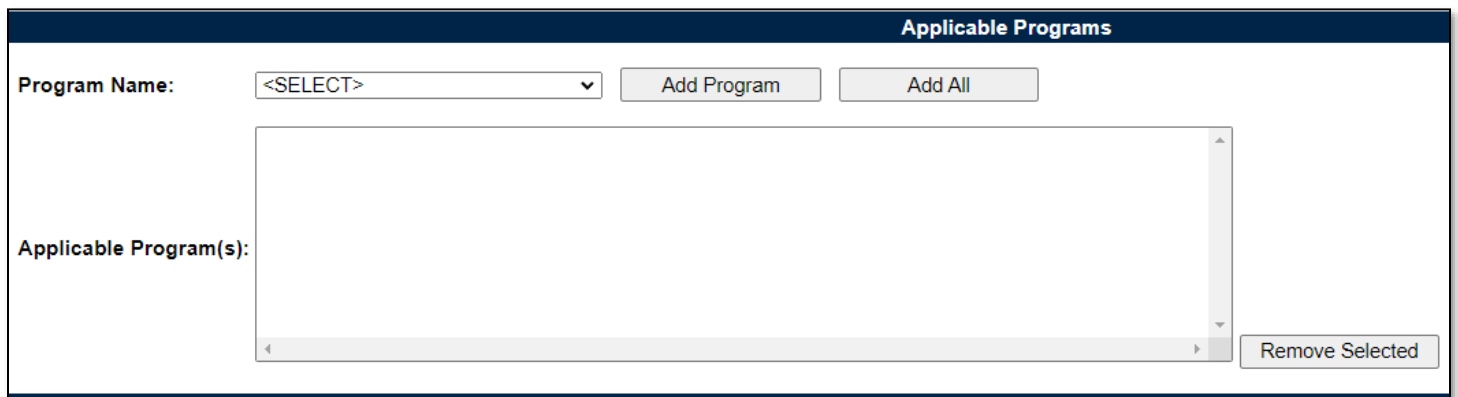
- **KCR Activity:** The Activity of the Associated KCR for which the Record Owner is also an assigned FS. This field will display as “N/A” when lacking a Surveillance Activity in the KCR.
- **KCR Event:** The Event of the Associated KCR for which the Record Owner is also an assigned FS. This field will display as “N/A” when lacking a Surveillance Activity in the KCR.
- **KCR UID:** The 8-digit unique identifier of the Associated KCR for which the Record Owner is also an assigned FS.
- **KCR# & Description:** The KCR# and Description of the Associated KCR for which the Record Owner is also an assigned FS.

Associated Button Functionality for **Figure 11.3**

- **Add KCR:** Applies the selected KCR to the Associated KCR table.
- **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 Record 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 were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Delete:** Removes the Associated KCR from the Table and reapplies to the Associated KCR dropdown. Action occurs when the corresponding box is selected and the “Delete” button is clicked.
- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected, a warning will populate notifying the user the Record is about to be marked “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.
- **Send Message for Review:** Saves the Record as a draft status before opening the Correspondence Page. After the refresh, messages may be sent to other Surveillance Plan users.

11.2.2 Applicable Programs (SPE/PE)

Figure 11.4 shows the default view of the Applicable Programs section. The Program Name dropdown list populates Programs added to the Surveillance Plan.



The screenshot shows a web interface titled "Applicable Programs". At the top, there is a "Program Name:" label followed by a dropdown menu currently showing "<SELECT>". To the right of the dropdown are two buttons: "Add Program" and "Add All". Below these elements is a large, empty list box with the label "Applicable Program(s):" on the left. At the bottom right corner of the list box, there is a button labeled "Remove Selected".

Figure 11.4

Select a corresponding Program from the dropdown provided as shown in **Figure 11.5**. Click the “Add Program” button to apply selection to the Applicable Program(s) list box.

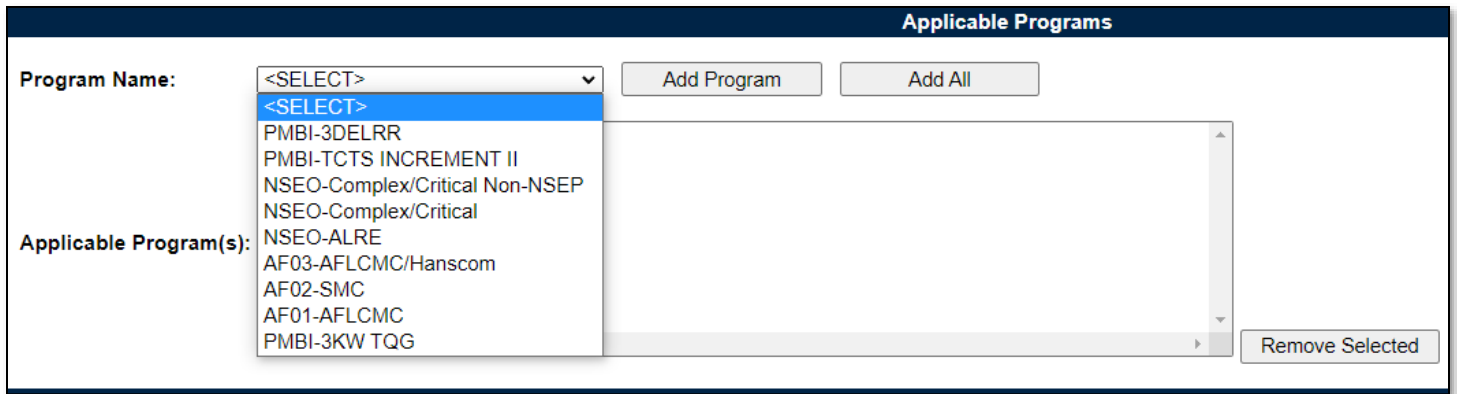


Figure 11.5

The “Add All” button applies all Programs listed in the dropdown to the Applicable Programs(s) list box. When used, the page will refresh with the contents of the dropdown displaying in the list box and the Program Name dropdown empty. An example of this can be seen in **Figure 11.6**.

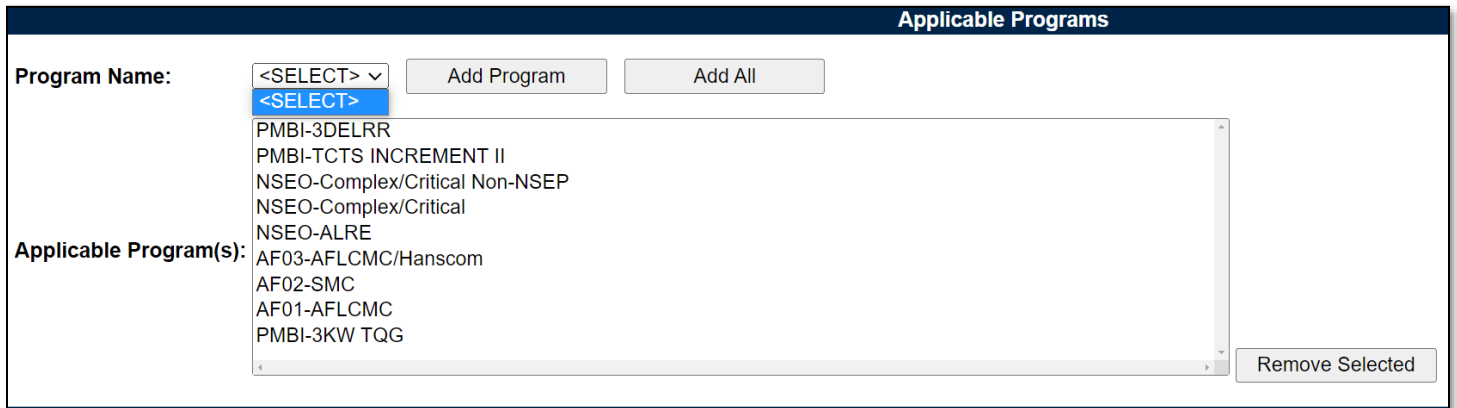


Figure 11.6

Associated Data Fields for Figure 11.6

- **Applicable Program(s):** List box containing the Programs selected as Applicable to the Record being worked.
- **Program Name:** Dropdown list comprised of Programs housed within the KTR Details. Archived Programs will not populate in the dropdown.

Associated Button Functionality for Figure 11.6

- **Add All:** This button adds the listed Programs displayed in the dropdown to the Applicable Program(s) list box. When used, the Program Name dropdown list will be empty.
- **Add Program:** This button adds the selected Program to the Applicable Program(s) list box. When applied, the selected Program will no longer populate in the dropdown.
- **Remove Selected:** Removes the selected item from the Applicable Program(s) list box and returns it to the Program Name dropdown.

11.2.3 Applicable Contracts (SPE/PE)

Figure 11.7 shows the default view of the Applicable Contracts section. The Contract Number dropdown list populates Contracts added to the Surveillance Plan.

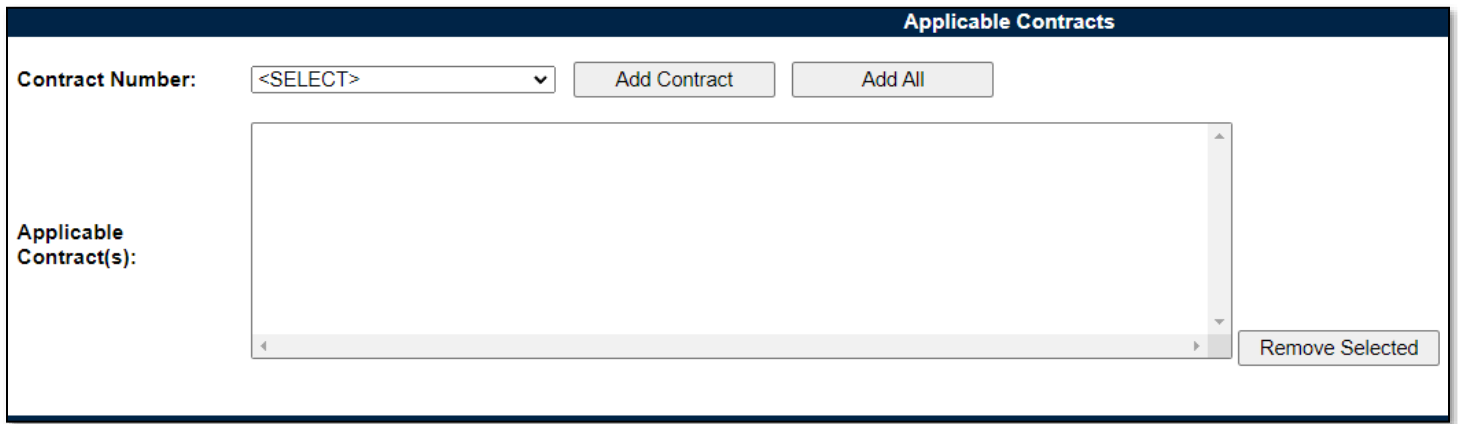


Figure 11.7

Select a corresponding Contract from the dropdown provided as shown in **Figure 11.8**. Click the “Add Contract” button to apply selection to the Applicable Contract(s) list box.

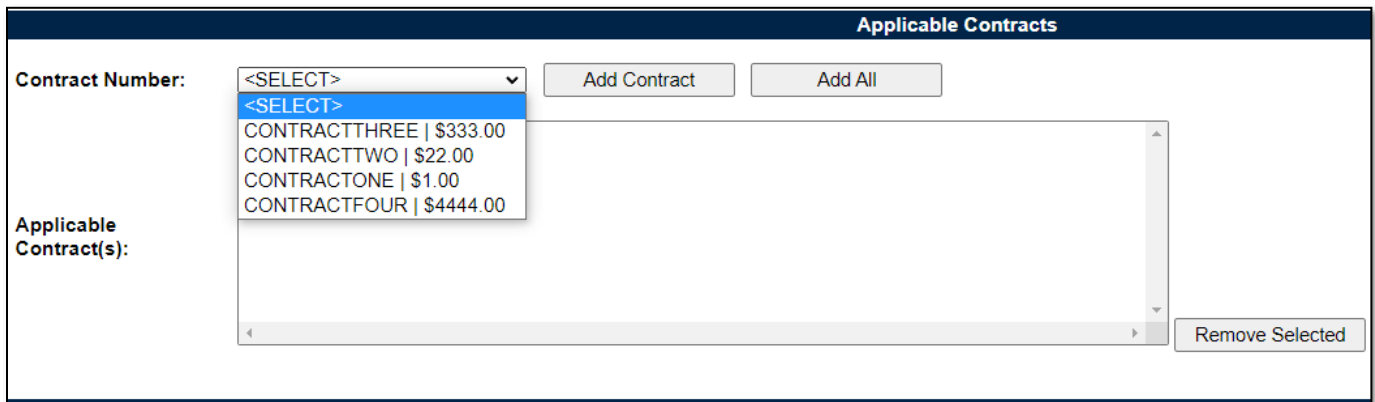


Figure 11.8

The “Add All” button applies the Contracts listed in the dropdown to the Applicable Contract(s) list box. When used, the page will refresh with the contents of the dropdown displaying in the list box with the Contract Number dropdown empty. An example of this can be seen in **Figure 11.9**.

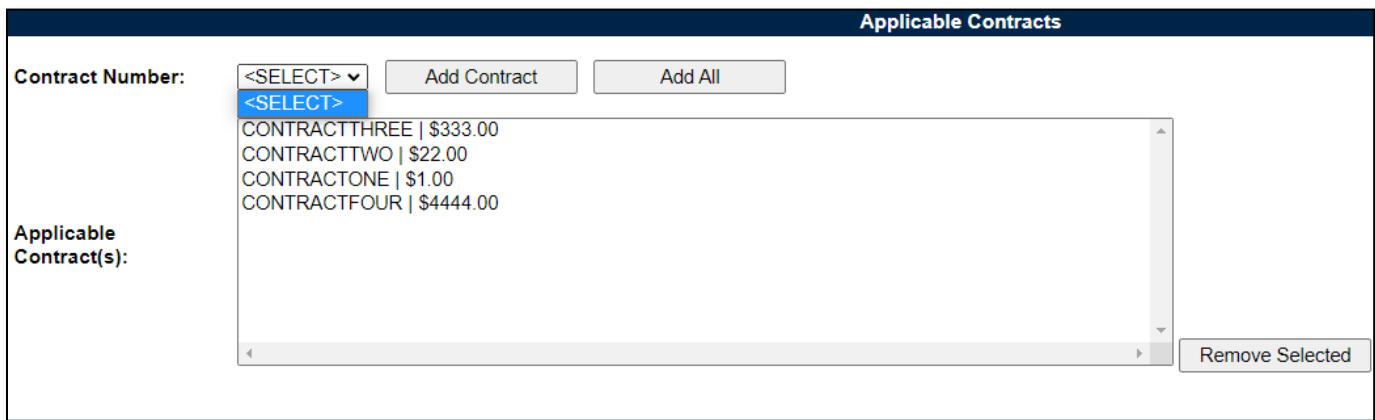


Figure 11.9

Associated Data Fields for **Figure 11.9**

- **Applicable Contract(s):** List box containing the Contracts selected as Applicable to the Record being worked.
- **Contract Number:** Dropdown list comprised of Contracts housed within the KTR Details. Archived Contracts will not populate in the dropdown.

Associated Button Functionality for **Figure 11.9**

- **Add All:** This button adds the listed Contracts displayed in the dropdown to the Applicable Contract(s) list box. When used, the Contract Number dropdown list will be empty.
- **Add Contracts:** This button adds the selected Contracts to the Applicable Contract(s) list box. When applied, the selected Contract will no longer populate in the dropdown.
- **Remove Selected:** Removes the selected item from the Applicable Contract(s) list box and returns it to the Contract Number dropdown.

11.2.4 KTR Information (SPE/PE)

Figure 11.10 shows a dropdown of available POCs who have been added to the KTR Details page. This is where the Record houses the point(s) of contact for the KTR.



Figure 11.10

In the conclusion section, if the Evaluation Result is “Un-Satisfactory”, then the KTR POC selection is required. If no KTR POC is available, the user must go back to the KTR Details page and enter at least one KTR POC.

11.2.5 Associated IDRs (SPE)

Figure 11.11 shows the default view of the Associated IDRs section. This area is exclusive to System/Progress Evaluation Records for Quality Assurance KCRs. This is where IDRs are created and housed for the associated SPE Record. The figures and explanations of this section serve as an overview of the IDR area outside of the Inspection.



Figure 11.11

An Inspection Detail Report is initiated when the “Create IDR” button is selected. After the page refresh, the pending draft IDR is displayed. The IDR will remain in a pending draft status until the Inspection is registered as a Draft IDR through the “Save” action or is expunged by exiting the page before the “Save” button is used. Once saved, the IDR will populate in the Associated IDR table as

seen in **Figure 11.12**. A minimum of one completed IDR must be applied to the Record to complete the SPE.

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

Associated IDRs																								
<div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-bottom: 5px;">Create IDR</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>IDR UID</th> <th>Last Updated Date</th> <th>Functional Specialist</th> <th>Status</th> <th>Actual Hours</th> <th>Reassign/Reopen</th> <th>Delete</th> <th>Attachments</th> </tr> </thead> <tbody> <tr> <td>PDREP-0224-0003-001</td> <td>02/02/2024 03:23:42 PM</td> <td>PDREP User</td> <td>Draft</td> <td></td> <td style="text-align: center;">Reassign</td> <td style="text-align: center;">Delete</td> <td style="text-align: center;">Attachments(0)</td> </tr> </tbody> </table>									IDR UID	Last Updated Date	Functional Specialist	Status	Actual Hours	Reassign/Reopen	Delete	Attachments	PDREP-0224-0003-001	02/02/2024 03:23:42 PM	PDREP User	Draft		Reassign	Delete	Attachments(0)
IDR UID	Last Updated Date	Functional Specialist	Status	Actual Hours	Reassign/Reopen	Delete	Attachments																	
PDREP-0224-0003-001	02/02/2024 03:23:42 PM	PDREP User	Draft		Reassign	Delete	Attachments(0)																	

Figure 11.12

Associated Table Columns for **Figure 11.12**

- **Actual Hours:** Display of the Actual Hours entered within the Record.
- **Functional Specialist:** Also known as the “Record Owner”, this is the Functional Specialist responsible for the IDR. Automatically generated by the users’ profile.
- **Last Updated Date:** The date the IDR was last updated based on the “Save” action.
- **IDR UID:** The 16-digit unique identifier of the Inspection Detail Report. The IDR UID is an extension of the Record UID by three digits and displays the sequence for which it was created (beginning with 001). This number automatically generates after the IDR is saved.
 - **Record UID Format:**
 - Plan’s Five-digit CAGE Code + Record’s two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
 - *Example: PDREP - 0622 - 0001*
 - **IDR UID Format:**
 - Record UID + 3-digit sequential number of populations starting at 001.
 - *Example: PDREP - 0622 - 0001 - 001*
- **Status:** The present status (*Draft/Complete*) of the IDR.

Associated Button and Hyperlink Functionality for **Figure 11.12**

- **Attachments (#):** This hyperlink opens the “Upload Attachment(s)” page and allows users to upload, view and delete attachments related to that of the IDR being worked. The number exhibited in parentheses indicates the number of attachments associated with the IDR. This number does not take into consideration attachments made to the Plan, Records or other IDRs. This means applied documents are exclusive to the location they are applied and will not populate elsewhere.
- **Create IDR:** Initiates creation of an Inspection Detail Report.
- **Delete:** The ability to delete an IDR is restricted by a user’s access level as well as their Team Code and the IDR status. The Delete column populates for those users with an access level of Supervisor or higher access. Button functionality is limited to those users of the same Team Code as the Record Owner (aka Functional Specialist). And the ability to delete an IDR is also dependent upon the IDR being in a draft status. The “Delete” button’s functionality is restricted to those IDRs marked as “Complete” and will display as grayed/disabled in such instances.
 - Once the IDR has been completed, (IDR Status=Complete) the ability to delete will be removed.

- To delete an IDR, select the “Delete” button associated with the IDR to be expunged. A pop-up message will display requesting confirmation of the delete request.
 - i. **Cancel:** Refreshes the page, clears the delete request and returns to the top of the IDR.
 - ii. **OK:** Captures the request and eliminates the IDR and its contents.
- **IDR UID:** The unique identifier of the IDR. When selected, this hyperlink will open the IDR to the appropriate display per the user selecting it (draft for the Record Owner & view for all other users).
- **Reassign/Reopen:** The Reassign/Reopen column displays either one button or the other depending on the IDR status. The Reassign button populates when the IDR is in a Draft status, while “Reopen” displays for completed IDRs. This column only populates for users with Supervisor or higher access. Button functionality is enabled for users of the same Team Code as the Record Owner.
 - To Reopen or Reassign an IDR, start by clicking the associated button for the IDR to be Reopened or Reassigned. A pop-up message will display requesting confirmation of the Reopen/Reassign request.
 - i. **OK:** Captures the request and Reopens or Reassigns the IDR.
 - ii. **Cancel:** Refreshes the page, clears the Reopen/Reassign request, and returns to the top of the Record.

11.2.6 Evaluation (SPE/PE)

Figure 11.13 shows the default view of the Evaluation section. This area is excluded from System/Process Evaluation Records for Quality Assurance KCRs and is located within the associated IDR.

Figure 11.13

Associated Data Fields for **Figure 11.13**

- **(M) Evaluation Criteria:** A text box used to enter the evaluation criteria for the Record being worked (*max of 3,000 characters*).
- **(M) Evaluation Item:** A text box used to describe the item being evaluated for the Record being worked (*max of 3,000 characters*).
- **Remote Surveillance:** Check box identifying if the surveillance was remote.
- **(M) Requirement Reference:** A text box used to enter requirement references for the Record being worked (*max of 3,000 characters*).

- **(M) Surveillance Techniques:** Check boxes used to identify surveillance techniques used. A minimum selection of one is required to mark the Record “Complete”.
- **Virtual Surveillance:** Check box identifying if the surveillance was virtual.

11.2.7 Conclusion (SPE/PE)

Figure 11.14 shows the default view of the Conclusion section. This is where the Records’ findings are entered.

The screenshot shows a form titled "Conclusion" with the following fields and controls:

- (M) Evaluation Result:** Satisfactory (dropdown)
- (M) Assess Risk:** No Change (dropdown)
- (M) Action Taken:** No Change (dropdown)
- (M) Results:** TEST (text input)
- (M) Actual Hours:** 23 (text input) and .00 (dropdown)
- (M) Completion Date:** (calendar icon)
- Status:** Draft (dropdown)
- Buttons: Back, Save, Add/View Attachments, Send Message for Review

Figure 11.14

Associated Data Fields for Figure 11.14

- **(M) Action Taken:** A determination by the Record Owner as to what (if any) action is to be taken. A selection of “Increase Surveillance”, “Decrease Surveillance” or “No Change” is made through the dropdown provided.
- **(M) Actual Hours:** Two fields used to enter the number of hours it took to conduct the surveillance as entered by the Record Owner. 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”.
- **(M) Assess Risk:** Assessment of the current Risk by the Record Owner. A selection of “Increase Risk”, “Decrease Risk” or “No Change” is made through the dropdown provided. When “Increase Risk” or “Decrease Risk” is selected, the “Update KCR Risk” button populates as seen in Figure 11.15. By clicking on the “Update KCR Risk” button, the Record is automatically saved (draft status), while the user is navigated to the associated KCR’s editable view with Record locking active.

This close-up shows the **(M) Assess Risk:** dropdown menu with "Increase Risk" selected, and the "Update KCR Risk" button positioned to its right.

Figure 11.15

- **(M) Completion Date:** A field used to Record the date the surveillance was completed. A future Completion Date may be used while the Record is in a draft status. However, a Completion Date less than or equal to “today’s date” is required before the Record can be marked “Complete”.

- **(M) Evaluation Results:** Results of the evaluation as determined by the Record Owner. A selection of “Satisfactory” or “Un-Satisfactory” is made through the dropdown provided.
- **(M) Results:** A text box to describe the results of the inspection (*max of 100 characters*).

IDR Actual minute(s) dropdown values:

- .00 = On the hour
 - .25 = Quarter Past the hour
 - .50 = Half past the hour
 - .75 = Quarter until the next hour
- **Status:** The present status (*Draft/Complete*) of the Record. This dropdown defaults to a draft status. When a user indicates the Record is complete, they will select “Complete” from the dropdown and click the “Save” button to capture their entry.
 - When the “Save” button is selected, a warning will populate notifying the user the Record is about to be marked as “Complete” and will no longer be editable (see **Figure 11.16**).
 - **Cancel:** Refreshes the page, clears the request to Complete the Record and returns to the top of the page.
 - **OK:** Captures the request and marks the Record Complete (when all mandatory fields have been satisfied). If not, an error message is generated at the top of the Record.

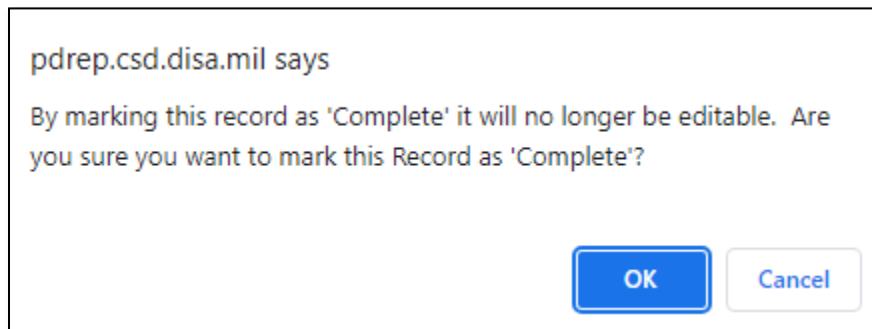


Figure 11.16

Associated Button Functionality for Figure 11.14

- **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 Record 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 were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected, a warning will populate notifying the user that the Record is about to be marked as “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.
- **Send Message for Review:** Saves the Record in draft status before opening to the correspondence page.
- **Update KCR Risk:** Navigates the user to the associated KCR for a Risk reassessment. When the “Update KCR Risk” button is used, the Record is automatically saved (draft status), while the user is navigated to the associated KCR’s editable view (with Record locking active).

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

12 SPE IDR

System/Process Evaluation (SPE) Inspection Detail Report (IDR)

Inspection Detail Reports are attributed to those KCRs designated as Quality Assurance (NASA, NSEO & QA), Aircraft Operations, or Contract Safety. For a SPE to be marked “Complete”, the Record must contain a minimum of one completed IDR.

12.1 Creating an IDR for SPE

Figure 12.1 shows the default view of the Associated IDR’s section within the SPE. This section is only displayed on SPEs that have a KCR with a designated Functional Area of NASA, NSEO, Quality Assurance, Aircraft Operations or Contract Safety.



Figure 12.1

An Inspection Detail Report is initiated when the “Create IDR” button is selected. After the page refresh, the pending draft IDR displays. The IDR will remain in a pending draft status until the Inspection is either registered as a “Draft” through the “Save” action or is expunged, by exiting the page before the “Save” button is used. Once saved, the IDR will display within the Associated IDR table located on the SPE Record. A minimum of one completed IDR must be applied to a SPE Record to mark the Record “Complete”.

Associated Button Functionality for **Figure 12.1**

- **Create IDR:** This button processes the request to create a new IDR associated with the SPE Record. Once a Record has been generated and saved (draft status), a line item will appear on the IDR table (**Figure 12.1**).

12.2 Record (IDR for SPE)

12.2.1 Details (IDR for SPE)

Figure 12.2 shows the default view of the Details section within the SPE. This area will duplicate the higher-level SPE Record (also known as the “Parent Record”).

Inspection Details Report (IDR) for System/Process Evaluation			
Instructions (M) Mandatory Field (CM) Conditional Mandatory Field 1. Enter/modify mandatory field(s) 2. Enter/modify additional information if available 3. To save the record, click Save 4. To cancel the process or go back, click Back 5. Correct format for Date Elements is MM/DD/YYYY or use Calendar 6. To add or view attachments click Add/View Attachment			
Assigned FS:	FS User Id:	FS Email:	FS Phone:
<input type="button" value="Back"/> <input type="button" value="Save"/> <input type="button" value="Add/View Attachments"/>			
IDR UID: PDREP-0224-0001-001 Record UID: PDREP-0224-0001 KCR UID: 0021 1039			
Surveillance Plan For: PDREP - PDREP CO Assigned Functional Area: NASA Quality Assurance KCR# & Description: KCR-NASA-0001 - Packaging, handling, and transportation Surveillance Event: Cushioning Thickness Surveillance Activity: N/A Surveillance Sub-Activity: N/A LOD RCN: N/A LOD DCN: N/A Delegator CAGE: N/A Surveillance Location: AIRCRAFT Alternate Address: N/A			
Associated KCRs			
KCR UID	KCR# & Description	KCR Event	KCR Activity
0021 1041	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	N/A

Figure 12.2

Associated Data Fields for **Figure 12.2**

- **Alternate Address:** Open text box for entering an alternate address (*max of 75 characters*).
- **Assigned FS:** Also known as the “Record Owner”, this is the Functional Specialist responsible for the IDR. Automatically generated by the users’ profile.
- **Assigned Functional Area:** The Functional Area established and pulled from the KCR.
- **Associated KCRs:** Display listing other KCR UID, KCR# & Description(s) for which the Record Owner is also an assigned FS.
- **Delegation Number:** Text box to enter the LOD RCN.
- **FS Email:** Taken from the users’ profile, this is the email address of the assigned Functional specialist who will be conducting the inspection.
- **FS Phone:** Taken from the users’ profile, this is the phone number of the assigned Functional Specialist who will be conducting the inspection.
- **FS User Id:** The User ID of the assigned Functional Specialist who will be conducting the inspection (*generally the first initial of the users first name, followed by the first 4 letters of the last name, sometimes ending in a number*).
- **KCR UID:** The 8-digit unique identifier of the KCR associated to the SPE Record.
- **KCR # & Description:** The KCR# and Description established and pulled from the KCR.
- **LOD RCN:** Record Control Number of the Incoming LOD associated to the KCR.
- **LOD DCN:** Document Control Number of the Incoming LOD associated to the KCR.
- **Delegator CAGE:** CAGE Code with the associated incoming LOD RCN/DCN from the KCR.
- **IDR UID:** The 16-digit unique identifier of the Inspection Detail Report. The IDR UID is an extension of the Record UID by three digits and displays the sequence for which it was created (beginning with 001). This number automatically generates after the IDR is saved.

- **Record UID Format:**
 - Plan's Five-digit CAGE Code + Records two-digit month & two-digit year of creation + the 4-digit sequential number of populations starting at 0001.
 - *Example: PDREP - 0622 - 0001*
- **IDR UID Format:**
 - Record UID + 3-digit sequential number of populations starting at 001.
 - *Example: PDREP - 0622 - 0001 - 001*
- **Record UID:** The 13-digit unique identifier pulled from the SPE Record.
- **Surveillance Activity:** The Surveillance Activity established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Activity in the KCR.
- **Surveillance Event:** The Event established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Event in the KCR.
- **Surveillance Location:** Displays the associated KCR location(s) as established in the KCR and selected in the SPE Record.
- **Surveillance Plan For:** The CAGE Code and Company Name of the contractor to whom the Surveillance Plan is attributed.
- **Surveillance Sub-Activity:** The Surveillance Sub-Activity established and pulled from the KCR. Field will display as "N/A" when lacking a Surveillance Sub-Activity in the KCR.

Associated Button Functionality for **Figure 12.2**

- **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 IDR 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 were applied and will not populate elsewhere.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the "Save" button is selected, a warning will populate notifying the user the IDR is about to be marked as "Complete" and will no longer be editable. A selection of "OK" or "Cancel" will need to be used to clear the pop-up.

12.2.2 Inspection Criteria (IDR for SPE)

Figure 12.3 shows the default view of the Inspection Criteria section within the IDR for SPE.

The screenshot shows a form titled "Inspection Criteria". It contains the following fields:

- Contract:** A dropdown menu with "-SELECT-" selected.
- Contract Line Item/Purchase Order:** A text input field.
- Contractors Command Media:** A text input field.
- (M) Inspection System Indicator:** A section with the instruction "(select at least one)". It includes four radio buttons: "AS9100", "AS9110", "ISO9001", and "Other".
- Other Standards Not Listed:** A text input field.

Figure 12.3

Associated Data Fields for Figure 12.3

- **Contract:** Restricted to one selection, this dropdown displays Contracts applied to the SPE Record. The dropdown will be blank when a contract has not been applied to the SPE.
- **Contract Line Item/Purchase Order:** Text box to the selected Contracts Line Item or Purchase Order for the IDR (*max of 50 characters*).
- **Contractors Command Media:** Text box to the selected Contracts Line Item or Purchase Order for the IDR (*max of 250 characters*).
- **Inspection System Indicator:** Check applicable box(es) with a minimum selection of one for:
 - AS9100
 - AS9110
 - ISO9001
 - Other
 - Standard (-2)
- **Other Standard not listed:** Text box allowing for Other Standards Not Listed to be entered for the IDR (*max of 50 characters*).

12.2.3 Process Elements (IDR for SPE)

Figure 12.4 shows the default view of the Process Element section within the IDR for SPE.

Process Elements

(M) Process Element:

(M) Description:

(M) Notes:

(M) Results: (CM) Process Finding:

(M) Review Date:

Command Media Adequate:

(M) Process Compliance Assessment:

(M) Process Effectiveness Assessment:

Figure 12.4

A minimum of one Process Element must be applied to the IDR before the IDR may be marked “Complete”. To add a Process Element to the IDR, enter the information into the text fields provided as shown in **Figure 12.5**.

Note: “Process Findings” will only populate for Aircraft Operations and Contract Safety IDR Records when “Results” is selected “Un-Satisfactory”.

Process Elements

(M) Process Element:

(M) Description:

(M) Notes:

(M) Results: (CM) Process Finding:

(M) Review Date:

Figure 12.5

Click the “Add New Process Element” button to apply the Process Element to the Process Element Table (as seen in **Figure 12.6**). Not all data fields must be present to apply a Process Element to the Process Element Table. An example of this may be seen in **Figure 12.6**. However, all five data fields (Process Element, Description, Notes, Results and Review) must be present (per Process Element) to complete the IDR.

Process Elements

(M) Process Element:

(M) Description:

(M) Notes:

(M) Results: (CM) Process Finding:

(M) Review Date:

Process Elements							
Process Element	Description	Notes	Results	Process Finding	Review Date	Edit	Delete
Facilities/Equipment	Description related to the process element.	Notes related to the process element.	Satisfactory	N/A	10/18/2023	<input type="button" value="Edit"/>	<input type="checkbox"/>

Command Media Adequate:

(M) Process Compliance Assessment:

(M) Process Effectiveness Assessment:

Figure 12.6

Associated Data Fields for **Figure 12.6**

- **Command Media:** A dropdown (Yes/No) to determine if Command Media is associated with the IDR.
- **Description:** Text box used to enter the description of the process (*max of 500 characters*).
- **(M) Notes:** text field available to enter notes related to the Process Element.
- **(M) Process Compliance Assessment:** A text box to describe the Process Compliance of the inspection (*max of 3,000 characters*).
- **(M) Process Effectiveness Assessment:** A text box to describe the Process Effectiveness of the inspection (*max of 3,000 characters*).
- **(M) Process Element:** A selection of Process Element is made through the dropdown provided. Selections for Process Element are:
 - Element Review
 - Environment
 - Machine
 - Manpower
 - Material
 - Method
- **(CM) Process Findings:** Dropdown under the definition to select Process Findings

- **Process Element Table:** An accumulation of the Process Element, Description, Results and Review data fields as applied to the table. Though the table can accommodate multiple entries, it will be hidden until a Process Element is applied.
- **Results:** Results of the review as determined by the Record Owner. A selection of “Satisfactory” or “Un-Satisfactory” is made through the dropdown provided.
- **Review Date:** Date the review was conducted.

Associated Button Functionality for **Figure 12.6**

- **Add New Process Element:** This button adds the Process Element to the Process Element Table. If the button is not used, the contents of the four Process Element data fields will not be captured.
- **Cancel:** This button clears the contents of the four Process Element text fields prior to being applied to the Process Element Table. When editing an applied Process Element from the Table, this button clears any changes and returns the Process Element to the table.
- **Delete:** Removes the Process Element from the Process Element Table. This action occurs when the corresponding box is selected and the “Delete” button is clicked. A pop-up message will display requesting confirmation of the delete action as seen in **Figure 12.6**.
 - **OK:** Captures the request and eliminates the Process Element from the table.
 - **Cancel:** Refreshes the page, clears the delete request and returns to the top of the IDR with the delete check box still selected for the Process Element.

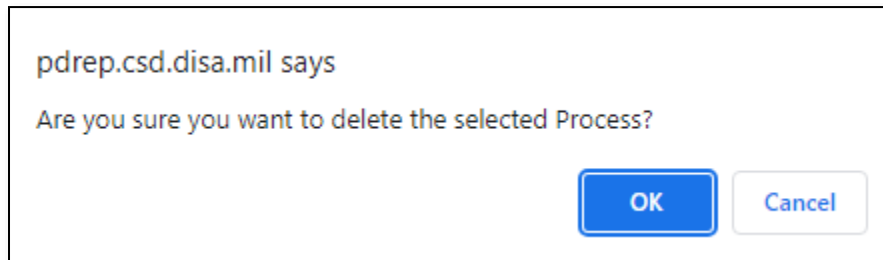


Figure 12.7

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

- **Edit:** This button opens the selected Process Element to an editable display, allowing the Record Owner to edit the selected Process Element. The “Save Process Element” must be used to capture the change and apply the Process Element back to the table.
- **Save Process Element:** Displays when editing a Process Element. This button reapplies the Process Element back to the Process Element Table. This button must be used to save any changes made while editing.

12.2.4 Evaluation (IDR for SPE)

Figure 12.7 shows the default view of the Results section within the IDR for SPE.

Evaluation	
(M) Evaluation Item:	<input type="text"/>
(M) Requirement Reference:	<input type="text"/>
(M) Evaluation Criteria:	<input type="text"/>
(M) Surveillance Technique(s):	<input type="checkbox"/> Examine <input type="checkbox"/> Monitor <input type="checkbox"/> Analyze <input type="checkbox"/> Validate <input type="checkbox"/> Inspect <input type="checkbox"/> Observe <input type="checkbox"/> Forecast <input type="checkbox"/> Verify <input type="checkbox"/> Interview <input type="checkbox"/> Test <input type="checkbox"/> Reconcile <input type="checkbox"/> Measure <input type="checkbox"/> Witness <input type="checkbox"/> Trend
Remote Surveillance:	<input type="checkbox"/>
Virtual Surveillance:	<input type="checkbox"/>

Figure 12.8

Associated Data Fields for **Figure 12.8**

- **(M) Evaluation Criteria:** A text box used to enter the evaluation criteria for the Record being worked (*max of 3,000 characters*).
- **(M) Evaluation Item:** A text box used to describe the item being evaluated for the Record being worked (*max of 3,000 characters*).
- **Remote Surveillance:** Check box identifying if the surveillance was remote.
- **(M) Requirement Reference:** A text box used to enter requirement references for the Record being worked (*max of 3,000 characters*).
- **(M) Surveillance Techniques:** Check boxes used to identify surveillance techniques used. A minimum selection of one is required to mark the Record "Complete".
- **Virtual Surveillance:** Check box identifying if the surveillance was virtual.

12.2.5 Conclusion (IDR for SPE)

Figure 12.9 shows the default view of the Conclusion section within the IDR for SPE.

The screenshot shows a web form titled "Conclusion". At the top, there is a dropdown menu for "(M) IDR Evaluation Result" with the value "-SELECT-". Below it is a text input field for "(CM) Deficiency(ies) Requiring Corrective Action:". Underneath is a larger text input field for "Notes:". At the bottom, there are two input fields for "(M) IDR Actual Hours": the first is a text box, and the second is a dropdown menu currently showing ".00". To the right of these is a date field for "(M) IDR Completion Date:" with a calendar icon. Further right is a dropdown menu for "IDR Status:" currently showing "Draft". At the very bottom are three buttons: "Back", "Save", and "Add/View Attachments".

Figure 12.9

- **(CM) Deficiency(ies) Requiring Corrective Action:** Text box to enter Deficiencies found during the inspection that require Corrective Action. Field becomes mandatory when IDR Evaluation Results are “Un-Satisfactory” (max of 1,000 characters).
- **Notes:** Open text box (max of 3,000 characters).
- **(M) IDR Actual Hours:** Two fields used to enter the number of hours it took to conduct the inspection as entered by the Record Owner. 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”.

IDR Actual minute(s) dropdown values:

- .00 = On the hour
 - .25 = Quarter Past the hour
 - .50 = Half past the hour
 - .75 = Quarter until the next hour
- **(M) IDR Completion Date:** A field used to Record the date the inspection was completed. A future Completion Date may be used while the Record is in a draft status. However, a Completion Date less than or equal to “today's date” is required before the Record can be marked “Complete”.
 - **(M) IDR Evaluation Results:** Results of the evaluation as determined by the Record Owner. A selection of “Satisfactory” or “Un-Satisfactory” is made through the dropdown provided.
 - **IDR Status:** The status (*Draft/Complete*) of the IDR. This dropdown defaults to a draft status. When a user indicates the IDR is complete, they will select “Complete” from the dropdown and click the “Save” button to capture their entry.
 - When the “Save” button is clicked, a warning will populate notifying the user the IDR is about to be marked as “Complete” and will no longer be editable.
 - **Cancel:** Refreshes the page, clears the request to Complete the IDR, and returns to the top of the page.
 - **OK:** Captures the request and marks the Record Complete (when all mandatory fields have been satisfied). If not, an error message is generated at the top of the IDR.

- **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 IDR 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.
- **Back:** Returns the display to the previous page.
- **Save:** This button may be used at any time to save the contents of the page. When the “Save” button is selected, a warning will populate notifying the user the Record is about to be marked as “Complete” and will no longer be editable. A selection of “OK” or “Cancel” will need to be used to clear the pop-up.

13 SEARCHING THE SP DATABASE – SP AD HOC

13.1 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 13.1**).

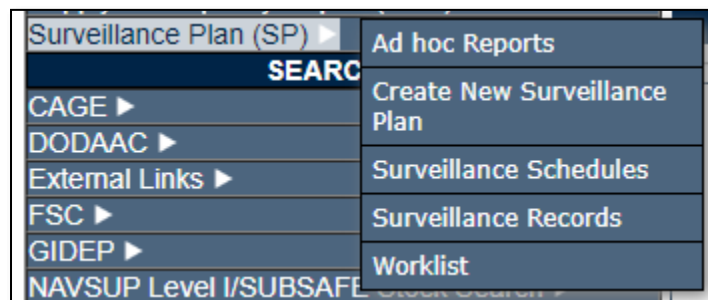


Figure 13.1

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 13.2**).

Surveillance Plan Worklist	Create Surveillance Plan	Surveillance Schedules	Surveillance Records	Surveillance Plan Ad Hoc Reports
Surveillance Plan Worklist				
<p>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</p>				
(M) Worklist Type: <input type="text" value="KTR Details"/>				
(M) Date SP Updated: From <input type="text" value="02/06/2023"/> To <input type="text" value="02/06/2024"/>				
Primary Location:	<input type="text"/>	<input type="button" value="Lookup"/>	Status:	<input type="text" value="Any"/>
User ID:	<input type="text"/>			
Team Code:	<input type="text"/>			
CMT DoDAAC:	<input type="text"/>			
KCR UID:	<input type="text"/>			
<input type="button" value="Display Worklist"/>				

Figure 13.2

Figure 13.3 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														
<p>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</p> <p>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</p>														
Select Data Record:	<input type="text" value="Surveillance Plan (ALL)"/> <input type="button" value="Get Data Elements"/>													
Row Count:	<input type="checkbox"/>													
maximum rowcount:	<input type="text" value="20000"/> (Maximum size : 20,000)													
Select Columns:	<table border="1"> <thead> <tr> <th>Data Elements</th> <th>Selected Data Elements</th> </tr> </thead> <tbody> <tr> <td>*KCR UID</td> <td rowspan="10" style="text-align: center; vertical-align: middle;">No columns selected</td> </tr> <tr> <td>*Primary Location</td> </tr> <tr> <td>*RECORD UID</td> </tr> <tr> <td>CMT DoDAAC</td> </tr> <tr> <td>Date Last Updated</td> </tr> <tr> <td>History Correspondence</td> </tr> <tr> <td>History Date</td> </tr> <tr> <td>History Message</td> </tr> <tr> <td>History Recipient's Name and Email</td> </tr> <tr> <td>History Recipients DoDAAC</td> </tr> </tbody> </table>	Data Elements	Selected Data Elements	*KCR UID	No columns selected	*Primary Location	*RECORD UID	CMT DoDAAC	Date Last Updated	History Correspondence	History Date	History Message	History Recipient's Name and Email	History Recipients DoDAAC
Data Elements	Selected Data Elements													
*KCR UID	No columns selected													
*Primary Location														
*RECORD UID														
CMT DoDAAC														
Date Last Updated														
History Correspondence														
History Date														
History Message														
History Recipient's Name and Email														
History Recipients DoDAAC														
Data Element:	<input type="text"/> <input type="button" value="Add Where"/>													

Figure 13.3

The “Select Data Record” dropdown, seen in **Figure 13.3**, has multiple data set options to choose from to pull different data elements for reporting. They are:

- i. IDR Data Elements

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

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

13.2 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 within 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, users have data elements for the Plan, KCRs, and Records. If data elements for Records are selected, but the *Record UID is not, users may see this error:

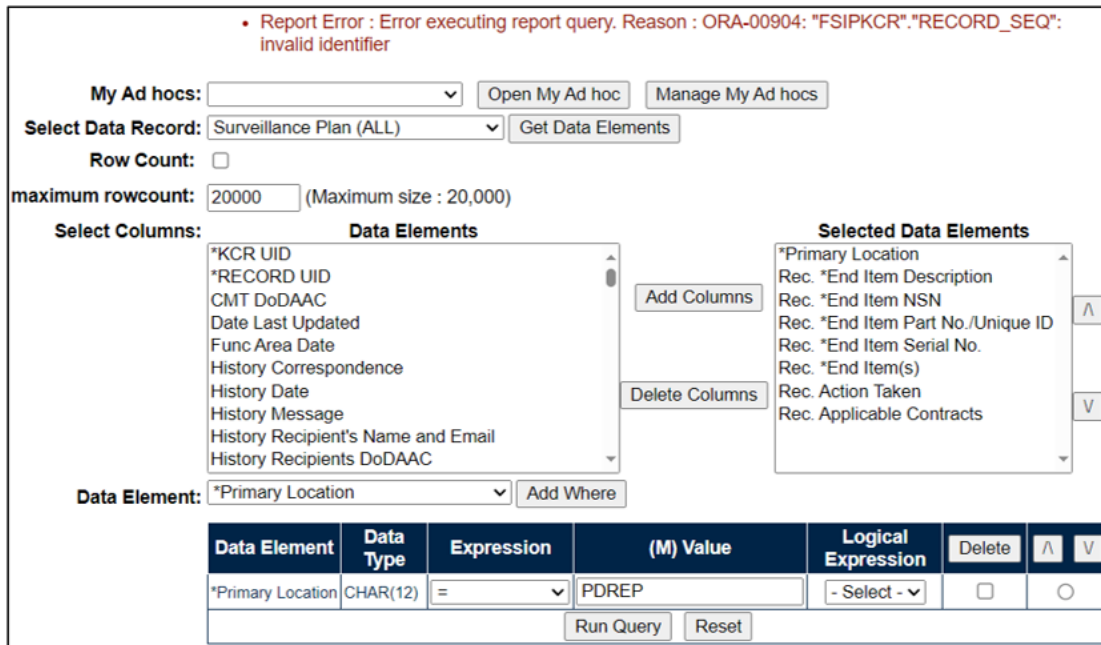


Figure 13.4

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.

13.3 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 13.5**), it may appear that rows are repeating or duplicating (**Figure 13.6**).

The screenshot shows a report configuration interface. At the top, there are fields for 'My Ad hocs', 'Select Data Record' (set to 'Plan Level Product Characteristic'), and 'Row Count' (set to 20000). Below this, there are two lists of data elements: 'Select Columns' and 'Selected Data Elements'. The 'Selected Data Elements' list includes items like '*Primary Location', 'SP End Item COG', 'SP End Item Description', etc. At the bottom, there is a table structure with columns: 'Data Element', 'Data Type', 'Expression', '(M) Value', 'Logical Expression', 'Delete', and navigation buttons. The table shows a row for '*Primary Location' with a data type of 'CHAR(12)' and an expression of '='.

Figure 13.5

Row Count: 24

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

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

Figure 13.6

Figure 13.6 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. Chara. Classification	SP Prod. Chara. Description	SP Prod. Chara. End Item ID	SP Prod. Chara. ESA Identified-CC	SP Prod. Chara. Insp. Req.	SP Product Characteristic
PDREP		VALVES, NONPOWERED	4820		4820				Active	4820						
PDREP		TEST TEST	4820	123456789	4820123456789	123456789			Active	4820123456789						
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	12	153	C1	Active	4820123456789C1						
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 13.7

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.

13.4 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 13.8.

Figure 13.8

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 13.9).

Figure 13.9

Any condition(s) or expression(s) may be used, but a Primary Location at minimum is recommended, with a KCR UID next (**Figure 13.10**).

Data Element	Data Type	Expression	(M) Value	Logical Expression	Delete	Λ	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"/>	

Figure 13.10

Run the Query to populate a table representing the Risk Trend (**Figure 13.11**).

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 13.11

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.

13.5 Record Level 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.

13.6 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.

13.7 IDR Level 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, a 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 13.12**).

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(I)ES 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(I)ES 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 13.12

13.8 IDR Level Product Characteristics

Like the Plan Level Product Characteristics, these data elements were added to an additional dropdown to allow for data pulls on just “IDR 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. 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 13.13**).

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

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	▲	▼
*Primary Location	CHAR(12)	=	PDREP	- Select - ▼	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>

Run Query Reset

Figure 13.13

Click "Run Query" to populate the results in **Figure 13.14**.

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 13.14

Highlighted in **Figure 13.15**, there are three IDRs repeating on multiple rows. This typically indicates there are multiple Product Characteristics associated with each of those IDRs. The next image shows 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 13.15

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.

13.9 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

(**Figure 13.16**) or can be found by clicking the User Guides selection under the Help menu on the top of any PDREP window (**Figure 13.17**).

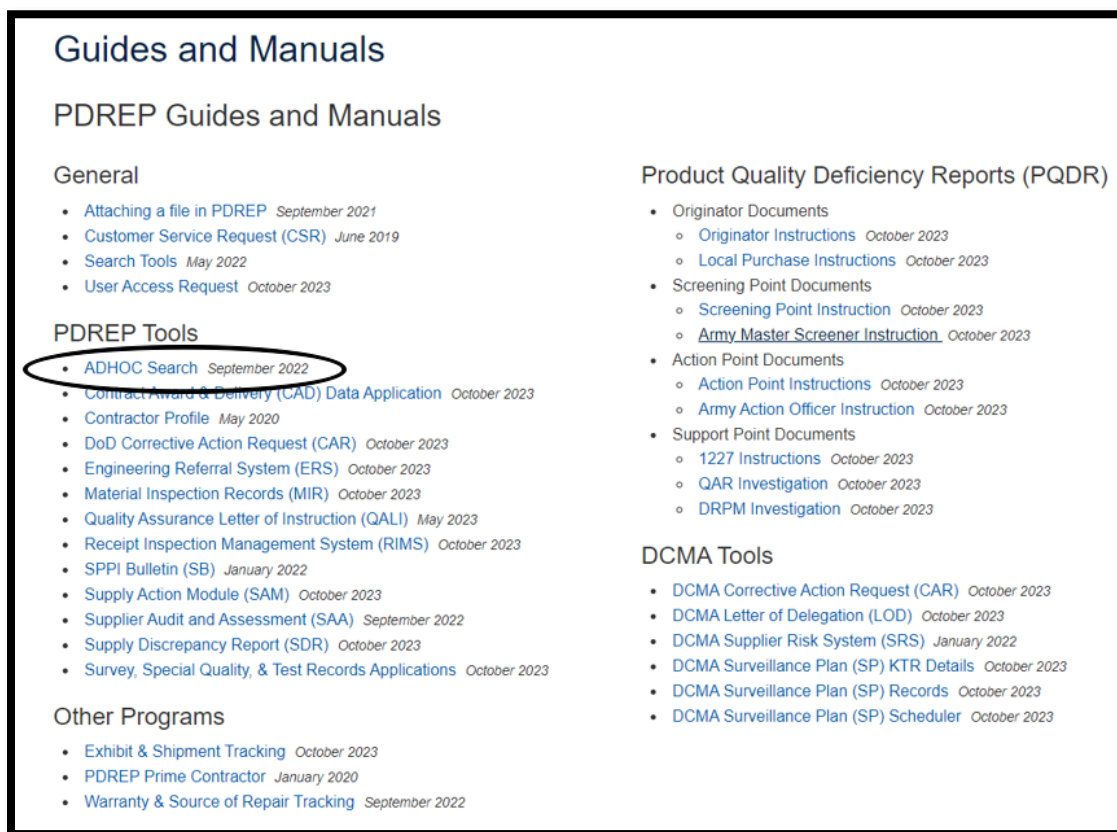


Figure 13.16

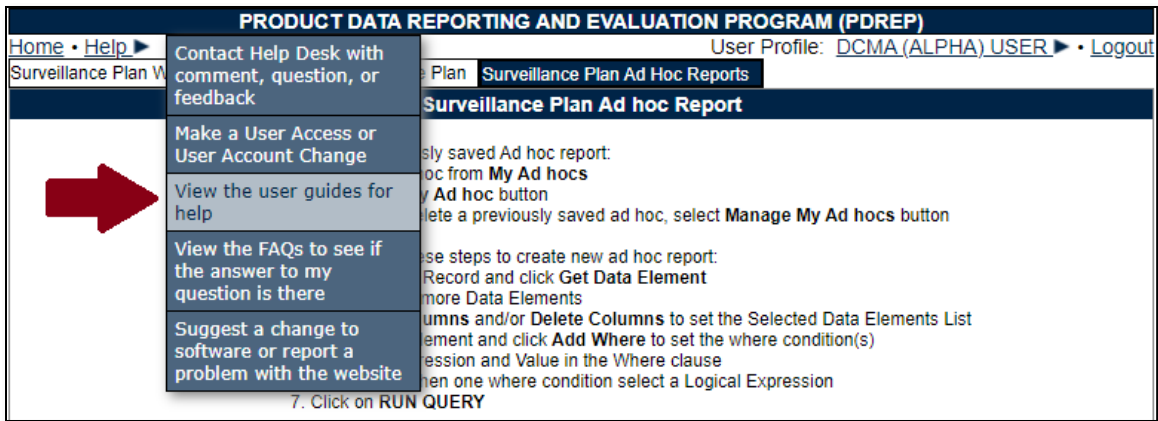


Figure 13.17

14 SUMMARY

This concludes the Surveillance Plan 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 Surveillance Plan 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.

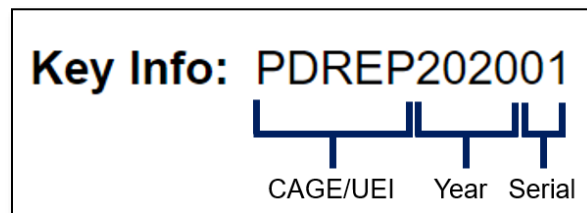


Figure A1.1

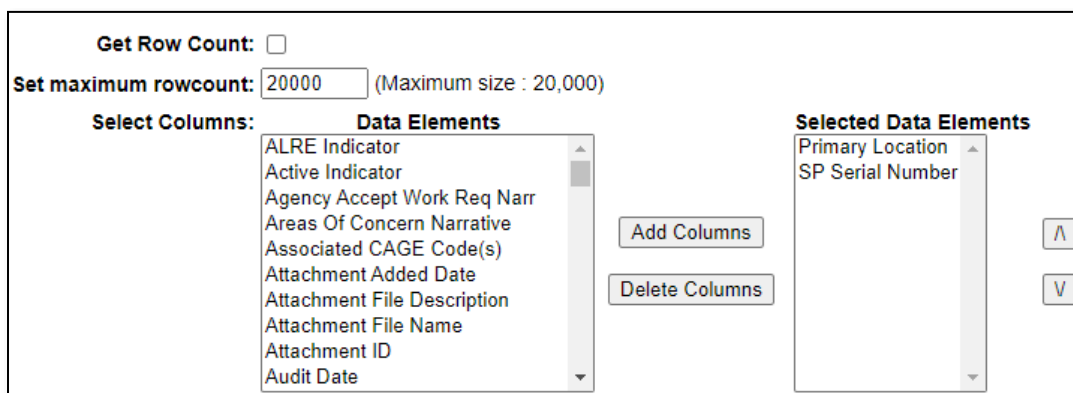


Figure A1.2

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

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 data that is not unique (the CAGE) and is tied to both unique values (the Contract Number) appear as two rows in the data. As described in **Appendix 1**, pivot tables and other spreadsheet manipulation methods are the best way to separate out this data once pulled via the Ad Hoc tool.

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

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

Surveillance Plan Data Dictionary

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

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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
IDR Evaluation Items	Record IDR	Evaluation Item	Narrative field for IDR evaluation item information	CHAR	50
IDR Evaluation Results	Record IDR	Result	Results of IDR Evaluation. S=Satisfactory, U=Unsatisfactory	CHAR	1
IDR Insp. System Ind. Other Stand.	Record IDR	Inspection System Indicator	Inspection System Indicator and other standard information	VARCHAR2	50
IDR Inspection Type	Record IDR	Inspection Type	1 ='In-Process', 2 ='Final'	CHAR	1
IDR Items Inspected	Record IDR	Total Items Inspected	Total number of items inspected	CHAR	1
IDR Items Presented	Record IDR	Total Items Presented	Total number of items presented	CHAR	1
IDR Items Released ARM	Record IDR	Total Items Released off ARM	Total Number of Items Released off ARM	VARCHAR2	4
IDR KCR# and Description	Record IDR	KCR# and Description	KCR# and Description	CHAR	50
IDR LOD CAGE Code	Record IDR	Delegator CAGE	CAGE Code with the associated incoming LOD RCN/DCN of the KCR for the IDR Record.	CHAR	5
IDR LOD DCN	Record IDR	LOD DCN	Document Control Number of the Incoming LOD of the KCR associated to the IDR Record.	VARCHAR	20
IDR LOD RCN	Record IDR	LOD RCN	Record Control Number of the Incoming LOD of the KCR for the IDR Record.	VARCHAR	20
IDR Manufacturing Spec.	Record IDR	Manufacturing Spec.	IDR Manufacturing Specification text box	CHAR	50
IDR Material Spec.	Record IDR	Material Spec	IDR Material Specifications text box	VARCHAR2	50
IDR Notes	Record IDR	Notes	Notes regarding IDR	VARCHAR2	3,000
IDR Proc. Compliance Assessment	Record IDR	Process Compliance Assessment	Narrative field to enter process compliance assessment information	CHAR	50
IDR Proc. Effectiveness Assessment	Record IDR	Process Effectiveness Assessment	Narrative field to enter process effectiveness assessment information	CHAR	50

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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
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,	KCR Surveillance Category	CHAR	50

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
		Deliverable Service Evaluation			
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 Specialist on a KCR retrieved from User profile separated by a comma	CHAR	10
KCR Assigned FS Name	KCR	Assigned Functional Specialist(s)	List of Names from the Assigned Functional Specialist on a KCR separated by a comma	CHAR	9999
KCR Assigned FS Region	KCR	Region	List of Region from the Assigned Functional Specialist on a KCR	CHAR	9999

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			separated by a comma		
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 incoming LOD RCN/DCN	CHAR	5
KCR LOD DCN	KCR	LOD DCN	Document Control Number of the Incoming LOD associated to the KCR	VARCHAR	20
KCR LOD RCN	KCR	LOD RCN	Record Control Number of the Incoming LOD associated to the KCR	VARCHAR	20
KCR Other Requirements	KCR	Other Agency Assigned Work Requirements	Text field available to describe other	CHAR	1000

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			agency assigned work requirements-notably for KCRs ending in "A002"		
KCR Risk - Allocated Hours	KCR	Allocated Hours	The time planned (in hours) to complete one event. This includes travel, preparation, and documentation.	CHAR	6
KCR Risk - Baseline	KCR	Rick Rating, Baseline	Initial Risk Rating of the KCR	Number	4
KCR Risk - Consequence	KCR	Risk Consequence	Auto-populated calculation	CHAR	1
KCR Risk - Cost Rating	KCR	Risk Consequence – Cost	Numeric 1-5 Selection for Lowest to Highest Risk for Cost	CHAR	1
KCR Risk - Cost Rationale	KCR	Rationale for Risk Consequence – Cost	Required when a numerical value is added to the Risk Consequence requiring a narrative in the text field to discuss reasons for selecting a particular option for Cost Risk.	CHAR	1000
KCR Risk - Likelihood Rating	KCR	Risk Likelihood	Numeric 1-5 Selection for Lowest to Highest Risk for Risk Likelihood	CHAR	1
KCR Risk - Likelihood Rationale	KCR	Rationale for Risk Likelihood	Narrative text field to discuss reasons for selecting a particular option for Risk Likelihood. Required even if Surveillance Warranted is set to "No".	CHAR	1000
KCR Risk - Performance Rating	KCR	Risk Consequence – Performance	Numeric 1-5 Selection for Lowest to Highest Risk for Performance	CHAR	1
KCR Risk - Performance Rationale	KCR	Rationale for Risk Consequence – Performance	Required when a numerical value is added to the Risk Consequence requiring a narrative in the text field to discuss reasons for selecting a particular option for Performance Risk.	CHAR	1000

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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 populate if relevant to the selection.	CHAR	100
KCR Surveillance Execution	KCR	Surveillance Execution Info	Text Field that allows surveillance execution information to be entered	CHAR	1000
KCR Surveillance Frequency	KCR	Frequency of Surveillance	The frequency of the planned Surveillance.	CHAR	35
KCR Surveillance Intensity	KCR	Intensity of Surveillance	Intensity selected that determine the appropriate level of oversight of a contractor to meet	CHAR	45

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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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
Next Evaluation Due Date Series	Background	N/A	Calculated next 20 date of surveillance based on start date and frequency	Date (DD- MMM-YY)	7
Rec. *End Item Description	Record	*End Item Description	Text entered at the Record level	VARCHAR2	200
Rec. *End Item NSN	Record	*End Item NSN	End Item NSN Selected for Parent Record	NUMBER	22
Rec. *End Item Part No./Unique ID	Record	*End Item Part No./Unique ID	Text entered at the Record level	VARCHAR2	20
Rec. *End Item Serial No.	Record	*End Item Serial No.	Text entered at the Record level	VARCHAR2	20
Rec. *End Item(s)	Record	Applicable End Items(s)	Same as Plan Level NSN	NUMBER	22

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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	VARCHAR2	6
Rec. Alt. Address	Record	Alt. Address	Alternative address on Record page.	VARCHAR2	75
Rec. Applicable Contracts	Record	Applicable Contracts	All Applicable Contracts displayed as one cell	NUMBER	22
Rec. Applicable Programs	Record	Applicable Programs	All Applicable Programs displayed as one cell	NUMBER	22
Rec. Assess Risk	Record	Assess Risk	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 THE RECORD AND A 'N' IF THERE IS NO ATTACHMENT.	CHAR	1
Rec. Closed Date	Record	Closed Date	Date user successfully saved the Record as "Complete" - User Action	Date (DD-MMM-YY)	7
Rec. Completed	Record	Completed	Action - Did Record owner marked & saved the Record as complete	CHAR	1
Rec. Completion Date	Record	Completion Date	Date indicated within the Record	Date (DD-MMM-YY)	7

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			"(M) Completion Date Field"		
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. NOTE: 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. NOTE: this data element will only be visible for completed Records when pulling from the ad hoc.	VARCHA R	20
Rec. LOD RCN	Record	LOD RCN	Record Control Number of the Incoming LOD of the KCR for the Record. NOTE: this data element will only be visible for completed Records when pulling from the ad hoc.	VARCHA R	20

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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.	VARCHA R2	6
Rec. Owner - Email	Record	FS Email	Email of the user who is associated (responsible) for the Record.	VARCHA 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	VARCHA R2	50
Rec. Owner - Team Code	Record- Background	Background	Team Code of the user who is associated (responsible) for the Record.	VARCHA 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
Rec. Prime KTR CAGE Code	Record	Prime KTR CAGE Code	Prime KTR CAGE Code	VARCHA R2	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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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	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
SO Due Date - Initial	Scheduler	Background	Occurrence Initial FIRST Due Date	Date (DD-MMM-YY)	7
SO Functional Area	Scheduler	Background	KCR Assigned Functional Area	CHAR	6
SO Name	Scheduler	Background	KCR Assigned FS Name	CHAR	50
SO No. Time Resched	Scheduler	Background	Number of times occurrence has been rescheduled	NUMBER	3
SO Overdue	Scheduler	Background	Ad hoc element to identify if a Record is Overdue. Display "Overdue" if true, Null if false.	VARCHAR2	10
SO Rational	Scheduler	Background	Reschedule / Cancel comments	VARCHAR2	1,000
SO Region	Scheduler	Background	KCR Assigned FS Region	CHAR	25

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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	FIRST 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
SP Attachment CUI Category	Attachments	CUI Marking	CUI Markings applied to the attachment	CHAR	1
SP Attachment File Description	Attachments	Description	Attachment description	CHAR	500
SP Attachment File Name	Attachments	File Name	Attachment file name	CHAR	100
SP Attachment File Size	Attachments	File Size	Attachment file size	CHAR	25
SP Attachment ID	Attachments	Background	Auto-populated unique attached ID	CHAR	20
SP Attachment Limited Distribution Control (LDC)	Attachments	Limited Distribution Control (LDC)	Attachment limited distribution controls	CHAR	1
SP Attachment User ID	Attachments	Uploaded By	User ID who uploaded the attachment	CHAR	6

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

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

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