DCMA Surveillance Plan (SP) Scheduler

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 <u>NOT</u> real data and it is <u>NOT</u> to be used for business purposes. The material presented is intended to serve as an example only and was taken from a test system.

REFERENCES

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

INTRODUCTION

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

Getting Access

- **First Time Users**

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

- **Existing PDREP Users**

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

Contact us
Contact us via submitting a help desk ticket either via the "Contact Help Desk" button in the lower right corner of our PDREP website or via the "Help" menu within the PDREP-AIS Application.

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

NSLC Portsmouth Help Desk
Commercial Phone: (207) 438-1690 / DSN 684-1690
FAX: (207) 438-6535 / DSN 684-6535
E-Mail: Contact us by submitting a help desk ticket either via the "Contact Help Desk" button in the lower right corner of our PDREP website or via the "Help" menu within the PDREP-AIS Application.

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

Additional Resources available on the NSLC Portsmouth Homepage
In order to aid PDREP-AIS users, reference these additional resources as needed:
FAQ – On the PDREP website under References, the Frequently Asked Questions page gives quick answers to the most commonly received inquiries. Your question(s) may be easily answered there.

Guides & Manuals – This area of the PDREP website (under References) houses the PDREP-AIS' technical documents. These comprehensive guides serve to offer directive on operational tasks and

enable users to pinpoint or problem solve without expert assistance. These manuals do not instruct on policy or process and are instead stepwise instructions on using the PDREP-AIS application. Relevant process and policy are however referenced in the beginning of each of these manuals.

Online Training – Computer-based distance learning may be accessed through the Reference fly-out of the PDREP website. Instruction takes place remotely via instructor-led directive, module simulation, video-conferencing, application demonstration, or recorded lesson.

FAQ, User Guides, and Online Training are also accessible within PDREP-AIS by hovering over the 'Help' link located at the top left of each application page.

1 SURVEILLANCE PLAN ACCESS

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

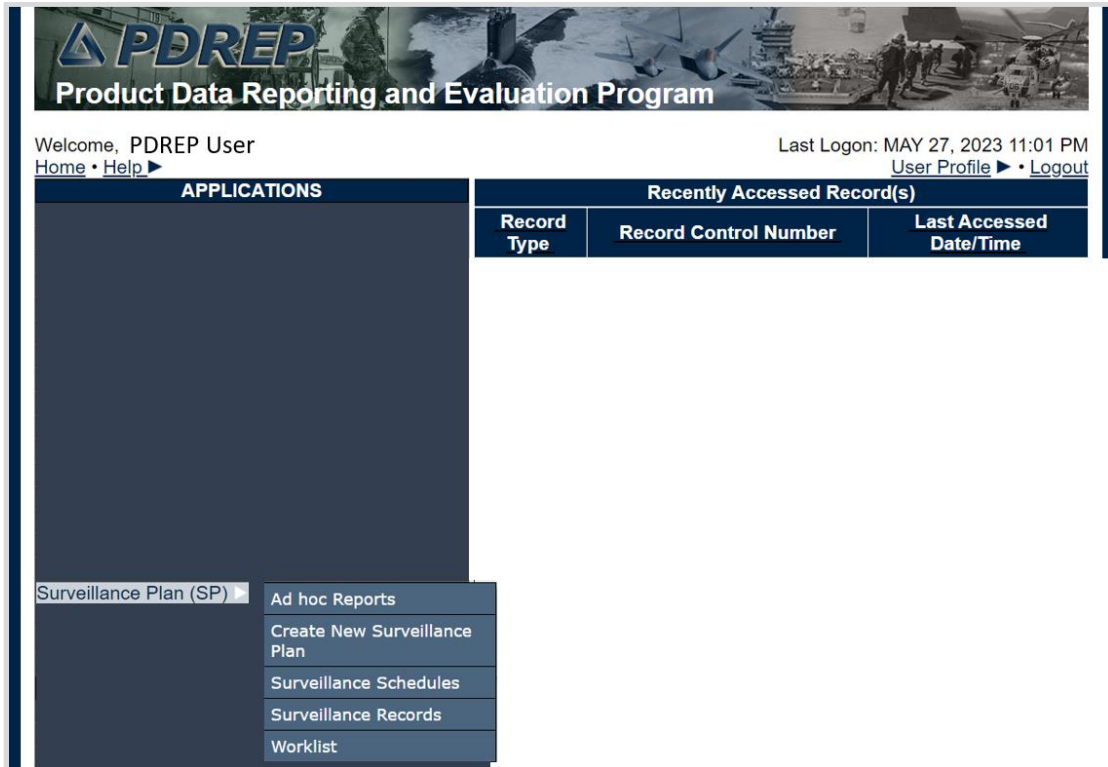## 1.1 Access Levels Functions

Table 1.1

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

FUNCTIONAL SPECIALISTS (FS)/Team Lead	View Access Plus:
	
	• 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:
		
		• For assigned KCRs, users can view, create and edit Schedule
		  ○ Cancel an occurrence with note
		  ○ Reschedule an occurrence with note
		  ○ Delete an occurrence with note
			View Access Plus:
			
			• For occurrences assigned to the FS users can create, edit and complete Records
			  ○ 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)	*Same as Supervisor/Contract Management Office (CMO) Plus: Delete a completed Record with comment*	*Supervisor/Contract Management Office (CMO) Plus: Delete a completed Record with comment*	*Supervisor/Contract Management Office (CMO) Plus: Delete a completed Record with comment*

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.
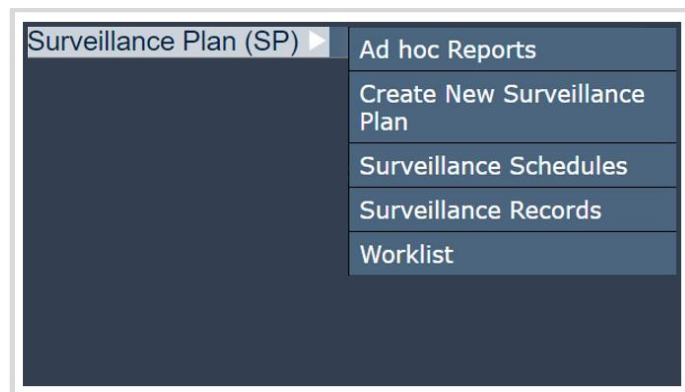
NOTE: Please refer to the PDREP User Access Request and Login Procedures user guide found on the website for additional details.

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

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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**).
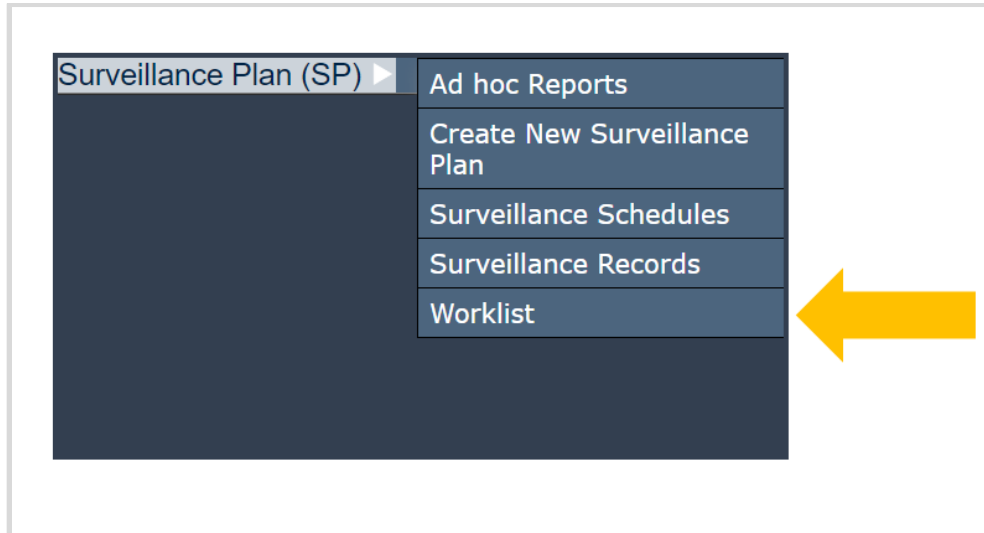
Figure 2.1

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

Instructions
(M) denotes a mandatory field
1. Enter mandatory fields denoted by **(M)**
2. Correct format for Date Elements is **MM/DD/YYYY** or use Calendar button
3. Enter at least one additional search field from the left hand list
3. Select **Status** as optionally needed
4. Click **Display Worklist** button

- Primary Location CAGE, User Code, Team Code, CMT DoDAAC or KCR UID is required to search.

(M) Worklist Type: KTR Details ▾

(M) Date SP Updated: From 10/18/2022 📅 **To** 10/18/2023 📅

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 2.2a

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.

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 inputted.
- **Lookup:** CAGE codes utilized in the application are validated against the PDREP database. The Lookup CAGE button allows the user to look up 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.*

Search Results Download: Click here to download data in spreadsheet

Filter By:	**CAGE Code:**	<SELECT>
	Status:	<SELECT>
		Apply Reset

< Prev	Page 1 of 1	Next >	**Result count: 1**	50 ∨ rows per page

Figure 2.3

Figure 2.4

Associated Data Fields for **Figure 2.4**

KCR Worklist Results

- **Company Name:** The name of the company associated with the Primary Location for the Surveillance Plan. Automatically populates based on the CAGE Code data field.
- **KCR# & Description:** Based on the Assigned Functional Area selected, choose the KCR# & Description from the dropdown. The Surveillance Events data field will then populate based off this selection.
- **KCR Status:** The status of the KCR
  - **Any**: Includes all active and archived statuses.
  - **Active:** A KCR engaged in ongoing surveillance.
  - **Archived:** A KCR for where surveillance is not currently being performed.
- **KCR UID:** Auto-populated, non-editable, 8-digit unique identifier of the KCR.
- **KTR Attachments:** Select the "Click Here" hyperlink located under the "KTR Attachments". This hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Plan.
- **Last Update Date:** The date the KCR was last updated, based on the "Save" action.
- **Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **Surv. Category:** Type of surveillance evaluation (DPE, DSE, PE, SPE) identified within the KCR.
- **View KCR:** Hyperlink that navigates to a view-only page of the Record.

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

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

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

KTR Details Worklist Results
- **Company Name:** The name of the company associated with the Primary Location for the Surveillance Plan. Automatically populates based on the CAGE Code data field.
- **KTR Attachments:** Select the "Click Here" hyperlink located under the "KTR Attachments". This hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Plan.
- **KTR Status:** Displays the status of the Plan.
- **Last Action:** Description of the most recent change to the Plan. Possible actions are the same list as items saved to the History page.
- **Last Update Date:** The date the KTR Details were last updated based on the "Save" action.
- **Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **Surv. Type:** This column indicates the type of Surveillance Plan. Currently, only one is available – "Plan".
- **View KTR:** Hyperlink that navigates to the view-only page of the KTR Details.

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

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

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

RECORD Worklist Results
- **Company Name:** The name of the company associated with the Primary Location for the Surveillance Plan. Automatically populates based on the CAGE Code data field.
- **KCR# & Description:** Based on the Assigned Functional Area selected, choose the KCR# & Description from the dropdown. The Surveillance Events data field will then populate based off this selection.
- **KCR UID:** Auto-populated, non-editable, 8-digit unique identifier of the KCR.
- **KTR Attachments:** Select the "Click Here" hyperlink located under the "KTR Attachments". This hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Plan.
- **Last Update Date:** The date the Record was last updated, based on the "Save" action.
- **Prime Location:** Hyperlink that navigates to the indicated Surveillance Plan.
- **Record Attachments:** Select the "View Record Attachments" hyperlink located under the "Record Attachments". This hyperlink opens to the "Upload Attachment(s)" page and allows users to upload, view and delete attachments related to that of the Plan. Please note, each Plan, Record and IDR has its own space for Attachments. This means 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:** Hyperlink that navigates to the view-only page of the Record.

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

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

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

3 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**.
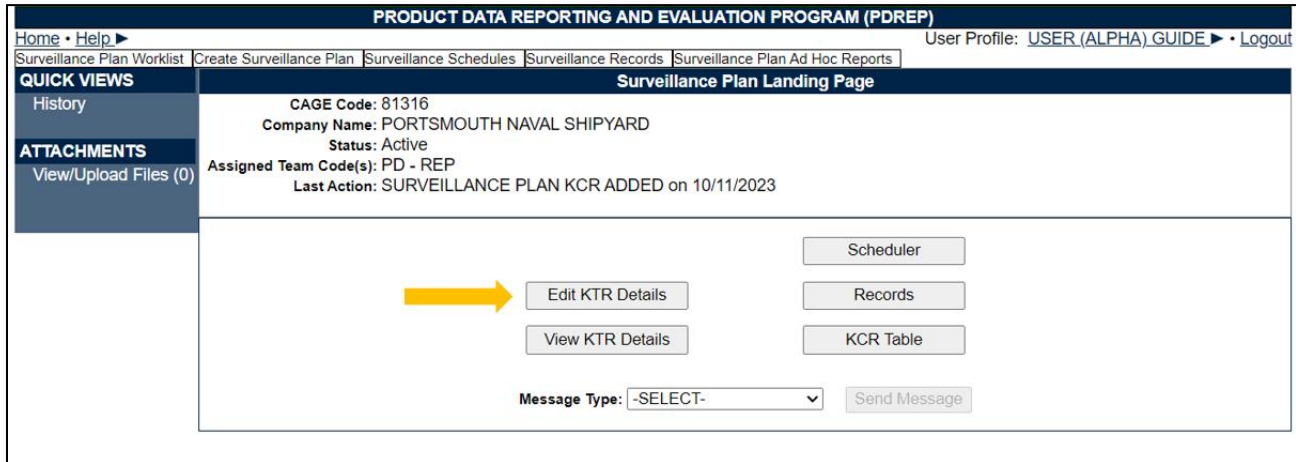
Figure 3.1

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 implemented 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).
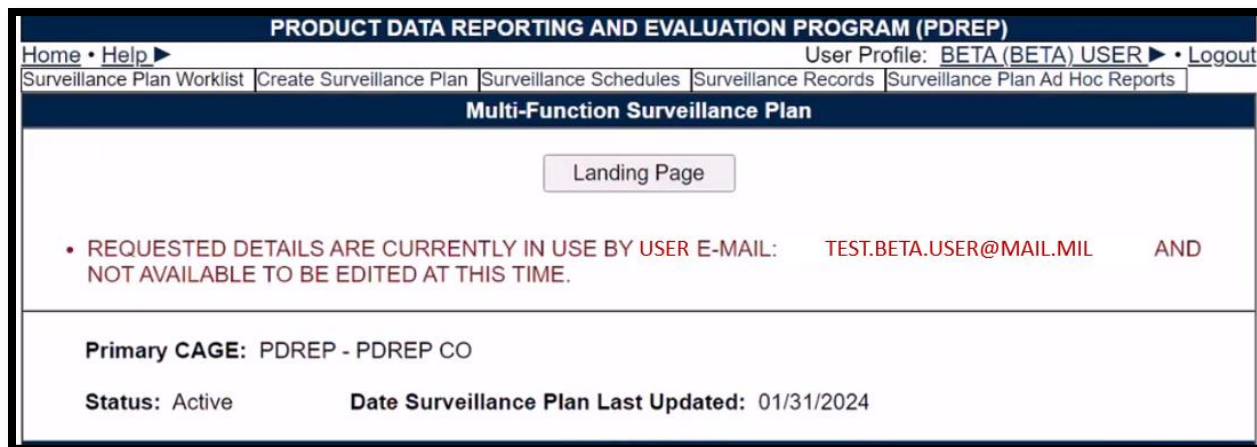
Figure 3.2

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", "Release Record", or navigate to the "Landing Page" as shown in **Figure 3.3**.
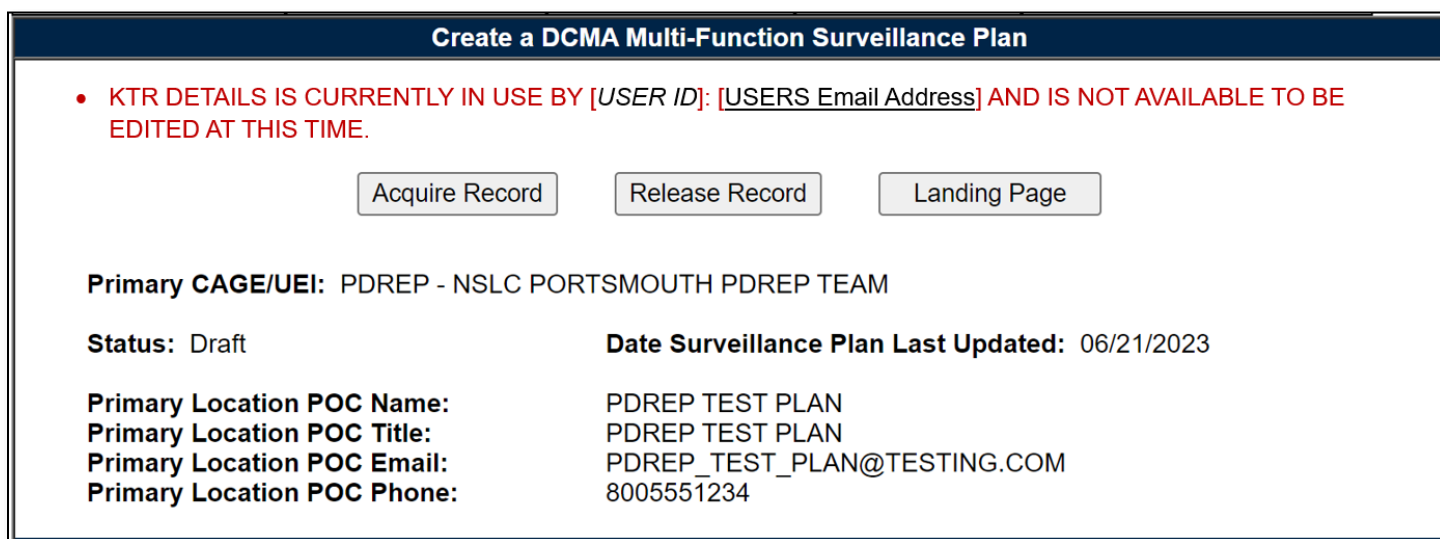

Figure 3.3

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**.

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**.

Figure 3.5

Associated Data Fields for **Figure 3.5**

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

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- **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 it's editing rights, the "Landing Page" button *MUST* be used when leaving the KTR Details Page. The Landing Page button is found at the top of the Surveillance Plan as shown in **Figure 3.6**.

Multi-Function Surveillance Plan

Save   Add/View Attachments   Landing Page

Primary CAGE: 81316 - PORTSMOUTH NAVAL SHIPYARD

Status: Active   **Date Surveillance Plan Last Updated:** 10/11/2023
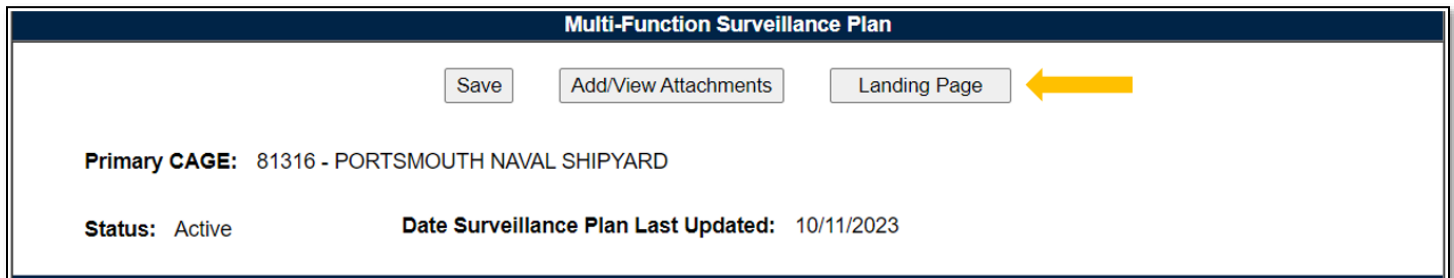
Figure 3.6

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 it's associated documents (at the Plan level).
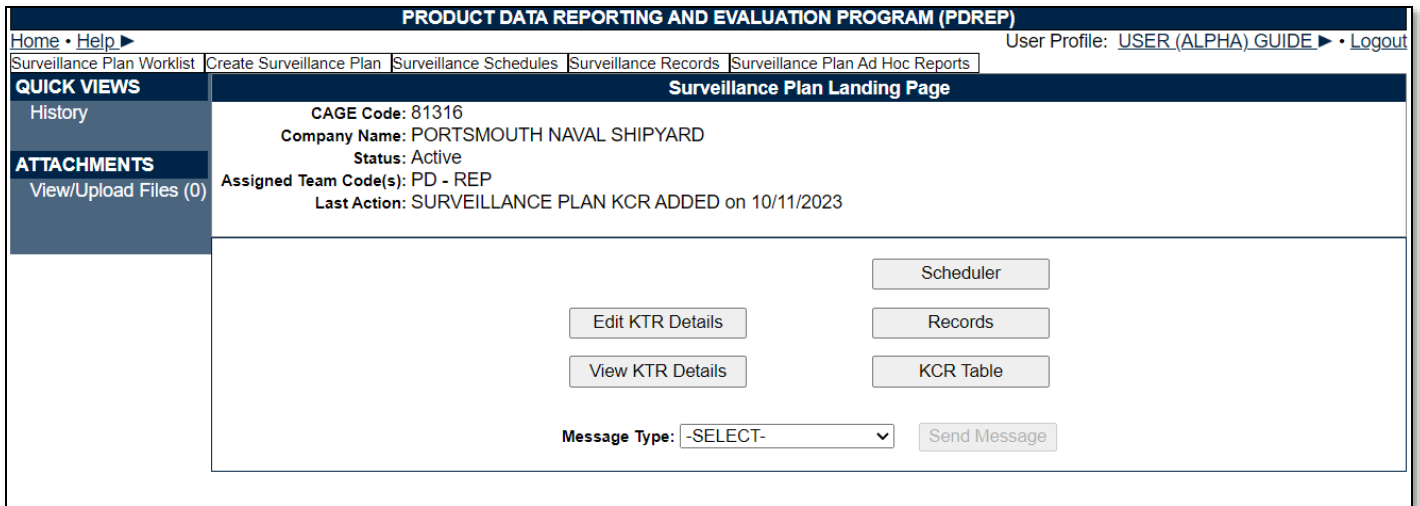
Figure 4.1

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:** 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 they are 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 along with the User's ID and Team Code as pulled from their profile.
- **View KTR Details:** 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**.

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.
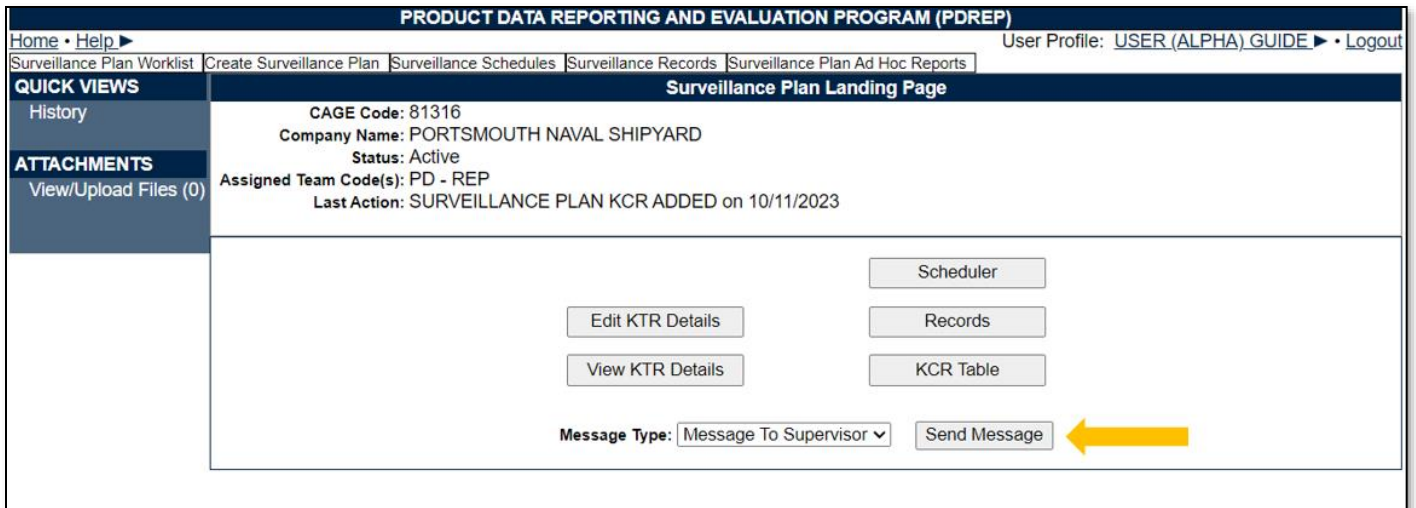
Figure 4.3

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.
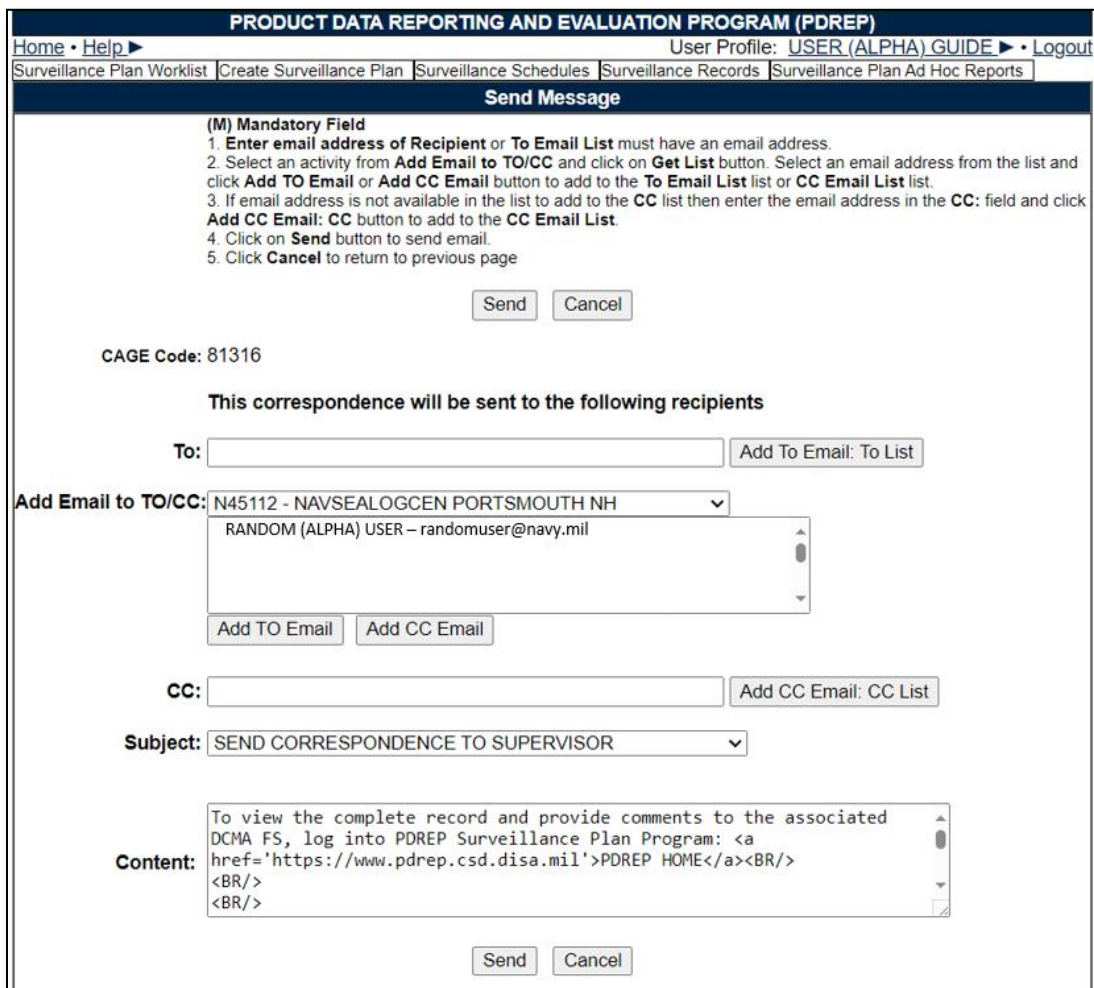

Figure 4.4

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**.

> • At least one TO Email Address is required to send this email

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.

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 ▼]
FIRST (ALPHA) LAST – anonymous@navy.mil

[Add TO Email] [Add CC Email]

RANDOM (ALPHA) USER – randomuser@na

TO Email List:
[Remove]

CC: [   ] [Add CC Email: CC List]

Subject: [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.
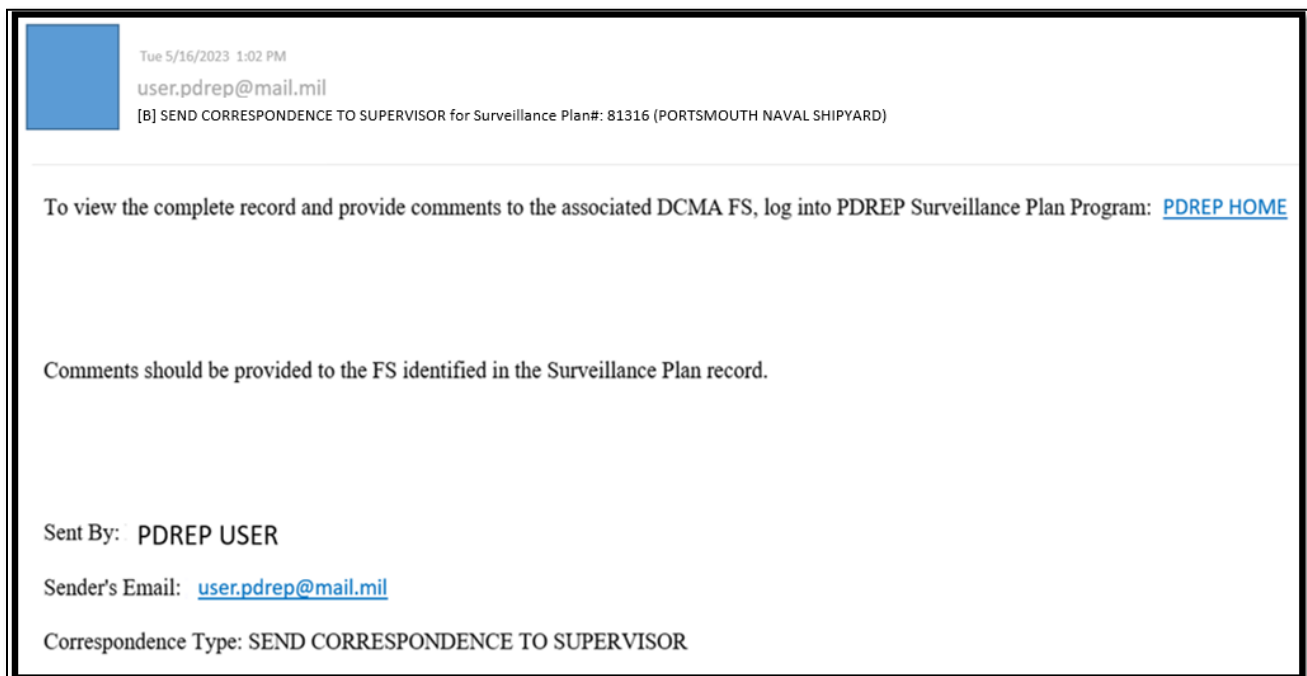
4.2.2.3   Message

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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 <BR/> as seen in ***Figure 4.4***, *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***.

Tue 5/16/2023 1:02 PM
user.pdrep@mail.mil
[B] SEND CORRESPONDENCE TO SUPERVISOR for Surveillance Plan#: 81316 (PORTSMOUTH NAVAL SHIPYARD)

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: PDREP USER

Sender's Email: user.pdrep@mail.mil

Correspondence Type: SEND CORRESPONDENCE TO SUPERVISOR

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.

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- **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.
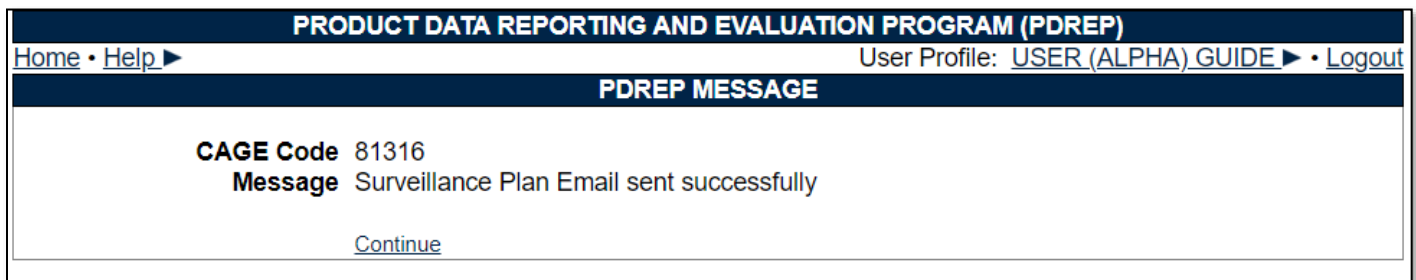
Associated Button Functionality for **Figure 4.7**

- **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 (see **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 4.9**.

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)	
Home • Help ▶	User Profile: USER (ALPHA) GUIDE ▶ • Logout
PDREP MESSAGE	

CAGE Code 81316
Message Surveillance Plan Email sent successfully

Continue

Figure 4.9

Lastly, a Record of the correspondence is added to the History Page (**Figure 4.10**).

						MESSAGE: TO VIEW THE COMPLETE RECORD AND PROVIDE COMMENTS TO THE ASSOCIATED DCMA FS, LOG INTO PDREP SURVEILLANCE PLAN PROGRAM: <A HREF='HTTPS://WWW.PDREP.CSD.DISA.MIL'>PDREP HOME</A> COMMENTS SHOULD BE PROVIDED TO THE FS IDENTIFIED IN THE SURVEILLANCE PLAN RECORD. SENT BY: USER (ALPHA) GUIDE SENDER'S EMAIL: RANDOMEMAIL@NAVY.MIL CORRESPONDENCE TYPE: SEND CORRESPONDENCE TO SUPERVISOR SENT TO: RANDOMEMAIL@NAVY.MIL
10/11/2023	N45112	USER (ALPHA) GUIDE	N45112	USER (ALPHA) GUIDE	SEND CORRESPONDENCE TO SUPERVISOR	

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 Plans.

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 SURVEILLANCE SCHEDULES

Surveillance Schedules was designed as a tool to ensure the correct type of oversight is completed efficiently and on time. Through automated forecasting, users are provided an anticipated series (schedule) of surveillance occurrences. An occurrence is one, singular anticipated oversight based off the KCR start date and multiplied by the frequency, per assigned FS. The anticipated oversight also known as an occurrence, begins populating in the Scheduler via the KCR start date. The anticipated series also known as reoccurrence takes the "Frequency of Surveillance" and multiplies that against the start date.

5.1 Schedules

Not all KCRs generate a returned schedule. Schedules are based off a specific formula of forecasting oversight when Surveillance is <u>Warranted</u> and <u>Not Delegated</u> (**Figure 5.1**).

The initial date of an oversight (also known as an "Occurrence") begins on the Start Date entered within the KCR. The anticipated series (also known as a "Reoccurrence"), takes the first occurrence (Start Date) and multiples it by the KCR's Frequency of Surveillance to provide a schedule of oversight per assigned FS. These reoccurrences will continue to populate up to (but not including) the KCR's End Date.
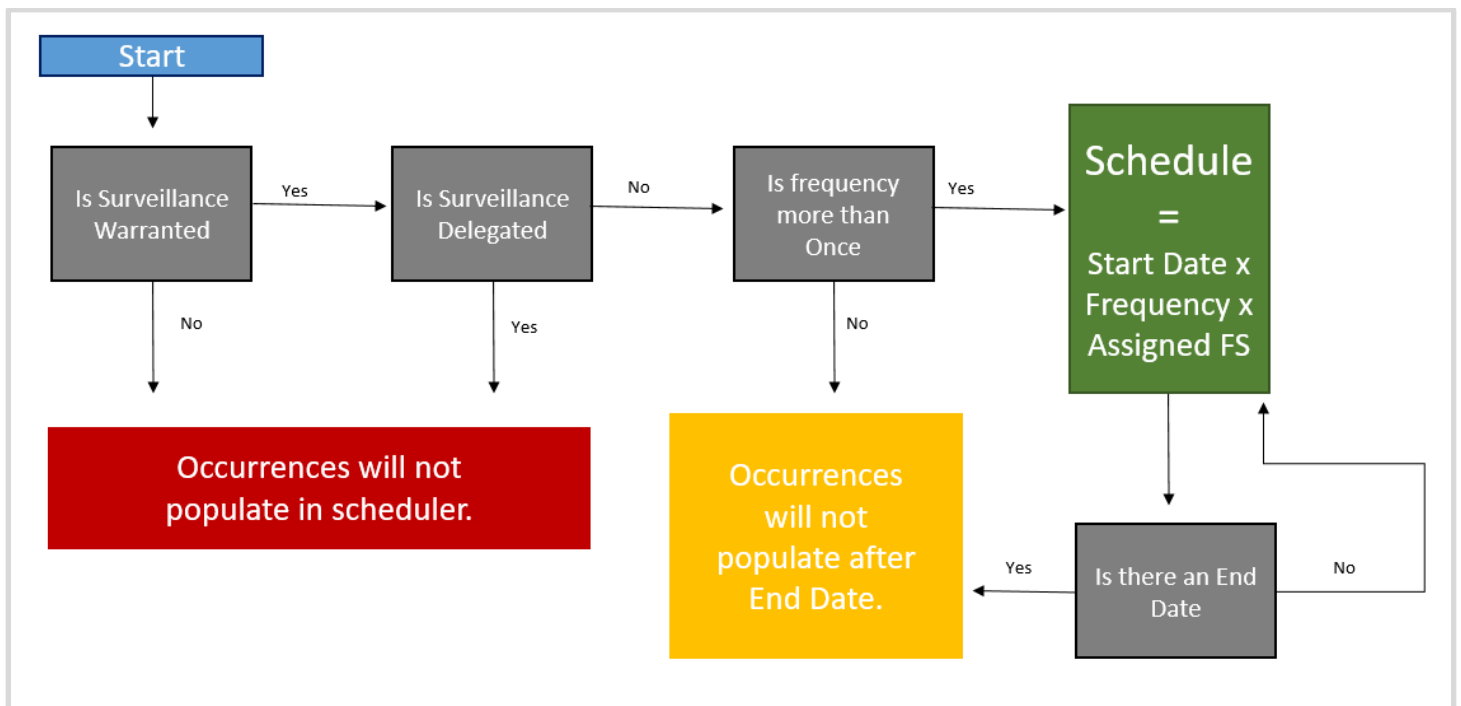

Figure 5.1

5.2 Accessing SP Schedules

On the PDREP Home Page, select "Surveillance Schedules" from the "Surveillance Plan (SP)" fly-out (**Figure 5.2**). The default page of Surveillance Schedules will generate as shown in **Figure 5.3**. This basic view does not prepopulate any data field.
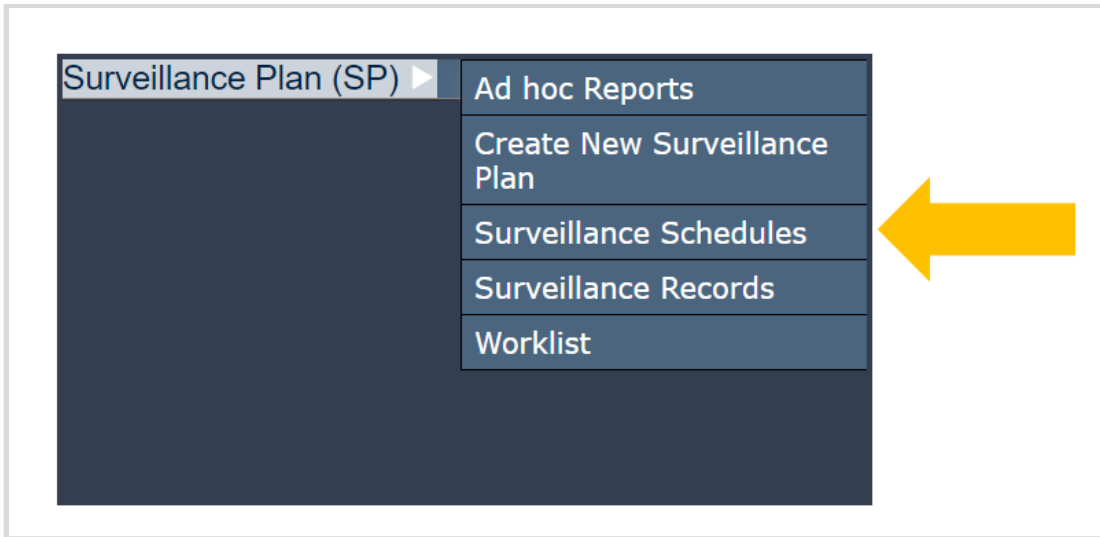
Figure 5.2

Figure 5.3

When the blue "Instructions" hyperlink is clicked in **Figure 5.3**, the Scheduler instructions will show fully for the user (**Figure 5.3a**). To hide the instructions, the user can click the blue "Instructions" hyperlink again.

Figure 5.3a

If already working in the application, select the "Surveillance Schedules" tab at the top of the page, or use the navigational button labeled "Scheduler" (**Figure 5.4**). When accessing the Surveillance Schedules Page from the tab, the default view, as shown in **Figure 5.4**, will generate. However, using the navigational buttons located within the Plan, three data fields (Primary CAGE, User ID and Team Code) will prepopulate. These values draw from the user's profile and the CAGE Code being worked.

Figure 5.4

5.3 SP Schedules Page

Surveillance Schedules Page (also known as the Scheduler), has a default view and a populated view. The default view does not prepopulate any of the field criteria required to generate a schedule, whereas the populated view contains the CAGE Code currently being worked, the User ID and Team Code as pulled from the user profile. Both display types contain three distinct sections:

1. Creating a Schedule
2. Filtering the Schedule
3. Schedule

*Note: Populated Schedules contain a "Landing Page" button which navigates the user back to the Landing Page of the Plan being worked (**Figure 5.5**).*

Figure 5.5

5.3.1 Creating a Schedule

Top of the page shows data fields that may be used when creating a schedule. Both the Scheduler's default and populated display contain a date range of 30 days from today's date. The date range is used to identify which occurrences should populate. Any occurrence on or within the dates entered will display within the returned schedule as shown in **Figure 5.6**.

Two of the mandatory data fields must be used for the schedule to return a worklist. However, the KCR UID field does not need a second field to search alongside when used (except the date range). The date range must not exceed four years, otherwise the user will receive an error message.

Select the "Display Schedule Worklist" button to create the schedule. Once the two mandatory values are satisfied (unless searching by just KCR UID) and a date range is present, what populates below the filtering section is the returned Schedule as determined by the Reoccurrence Formula.

Figure 5.6

Associated Data Fields for **Figure 5.6**

- **(M) CMT DoDAAC:** Organization assigned to the Prime Location for Surveillance.
- **(M) Functional Area**: Dropdown list based on the sixteen Functional Areas.
  - i. Aircraft Operations
  - ii. Contract Safety
  - iii. Contracts
  - iv. Cost & Pricing
  - v. Earned Value
  - vi. Earned Value Analysis
  - vii. Engineering
  - viii. Manufacturing
  - ix. NASA Quality Assurance
  - x. NSEO Quality Assurance
  - xi. Packaging
  - xii. Plant Clearance
  - xiii. Property Administration
  - xiv. Quality Assurance
  - xv. Small Business

xvi.   Software Acquisition Management

xvii.   Transportation

- **(M) Planned Start Date (*Date Range*):** Date range will default to a 30-day query starting with "todays" date. This editable field will generate occurrences on or within the dates provided up to four years.
  - **From:** Start date of query. Defaults to "todays" date, then forecasts 30 calendar days out and is editable by user.
  - **To:** Ending point of query and is editable by user.
    - i.   Query cannot be performed without a start or end date. The user will receive the standard error message if one of the dates is not present and queried (**Figure 5.6a**).

Figure 5.6a

- ii.   Maximum return will be 4 years of the "From" date entered and concluding on the "To" date entered. For instance, if the start date entered is 01/10/2050 the end date cannot exceed 01/10/2054.
- **(M) Primary CAGE:** CAGE Code of the contractor to whom the Surveillance Plan is attributed.
- **(M) Team Code:** Team Codes based on Assigned Functional Specialists found within the Plan's KCRs.
- **(M) User ID:** Assigned Functional Specialist within the KCR.

Associated Buttons for **Figure 5.6**

- **Landing Page:** Navigates the user back to the Landing Page of the Plan being worked.
- **Display Schedule Worklist:** Will display the returned Schedule based on the criteria entered and the date range used.

5.3.2 Filtering The Schedule

The second section of the Surveillance Plan Schedules page is where the primary query may be filtered, allowing the user to view a more detailed return (**Figure 5.7**). The filtering dropdowns generate their returned values based on the entries made when creating a schedule.

Note: A combination of *Primary CAGE, CMT DoDAAC, Assigned FS ID, Assigned FS Team Code or Functional Area and a Date Range must be queried first and register a returned schedule to have additional filtering options populate.*

Filter By:	Status:	N/A ⌄			Contract:	N/A	⌄
	Delegated:	N/A ⌄			Program:	N/A	⌄
Sort By:	Planned Start Date (Ascending) ⌄		Apply	Reset			

| < Prev | Page 0 of 0 | Next > | | Result count: 0 | | 50 ⌄ | rows per page |

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions

Figure 5.7

Associated Filters for **Figure 5.7**

- **Status:** Dropdown which may include the following depending what statuses are in the return:
  - **---:** This status denotes an anticipated oversight that does not have a related Record (DPE/DSE/PE/SPE).
  - **--- Overdue:** This status denotes an anticipated oversight that does not have a related Record (DPE/DSE/PE/) and is considered overdue. The occurrence will be marked overdue when the Record is completed the day after the due date.
  - **Draft:** This status denotes an oversight in process, but not yet completed. There is a draft Record associated with the occurrence.
  - **Draft Overdue:** This status denotes a Record associated to an oversight considered past due, the day after the oversight "should" have occurred based on the time between the "Start Date & Due Date" of the occurrence. The status text will turn from black (current) to red for overdue.
    - An example of this would be an oversight start date of 30 May 2023 with a weekly frequency; the due date would be 06 June 2023. The status would turn red and "Overdue" on 07 June 2023.
    - Days Over Due starts counting after the KCR is created. It will show negative numbers counting towards the Due Date in black text when today's date does not equal to or exceed the KCR's Due Date.
    - When today's date is equal to the Due Date, "0" will be shown in black text.
    - Once the Due Date passes and there is no completed Record with the scheduled occurrence, text will turn red and show a positive number counting how many days past the Due Date it has been. This will continue counting in red text until a Record is marked complete for that specific occurrence.
    - It does not matter if a Record is attached to the oversight; the only consideration is if the frequency had been exceeded.

- o **Complete:** This status denotes a completed oversight. All mandatory fields have been satisfied and the corresponding Record (DPE, DSE, PE, SPE) reflect as "Completed". Red text will display when the occurrence was completed after the anticipated Due Date.
- o **Re-Opened:** This status denotes a Record previously marked as "complete" has been reopened.
  - "Reopen" will remain as the status and show in red font if overdue.
  - It will remain in red font as "Reopened" until the user makes the necessary changes then completes the Record again.
  - If a Record is reopened after being closed, the text color will be representative of the date's status.
  - Red text will display when the occurrence was completed after the anticipated Due Date before being reopened.

Note: Once a status becomes overdue, the status text becomes red and stays red regardless of any action taken.

- **Contract:** Text field allows alphanumeric characters. When six characters are entered (beginning of the contract) allows a search to be conducted, each additional character will further reduce the return. If a Program has been selected before a Contract has been entered, this field will be grayed out.
- **Delegated:** Currently set to No and not editable.
- **Program:** Dropdown display of any program associated to initial query results. If a Contract has been entered before a Program has been selected, this field will be grayed out.
- **Sort By:** The return may be sorted based on the following criteria**:**
  - o Assigned FS (Ascending)
  - o Assigned FS (Descending)
  - o CAGE (Ascending)
  - o CAGE (Descending)
  - o Due Date (Ascending)
  - o Due Date (Descending)
  - o KCR UID (Ascending)
  - o KCR UID (Descending)
  - o Planned Start Date (Ascending)
  - o Planned Start Date (Descending)

5.4 Table Return – Scheduler

There are two returned schedule types:
1. An individual schedule where the returned schedule is limited to a singular user (**Figure 5.8,** left-hand schedule), and
2. A group schedule where the returned schedule may show multiple users within the same Team Code or Plan (**Figure 5.8,** right-hand schedule).
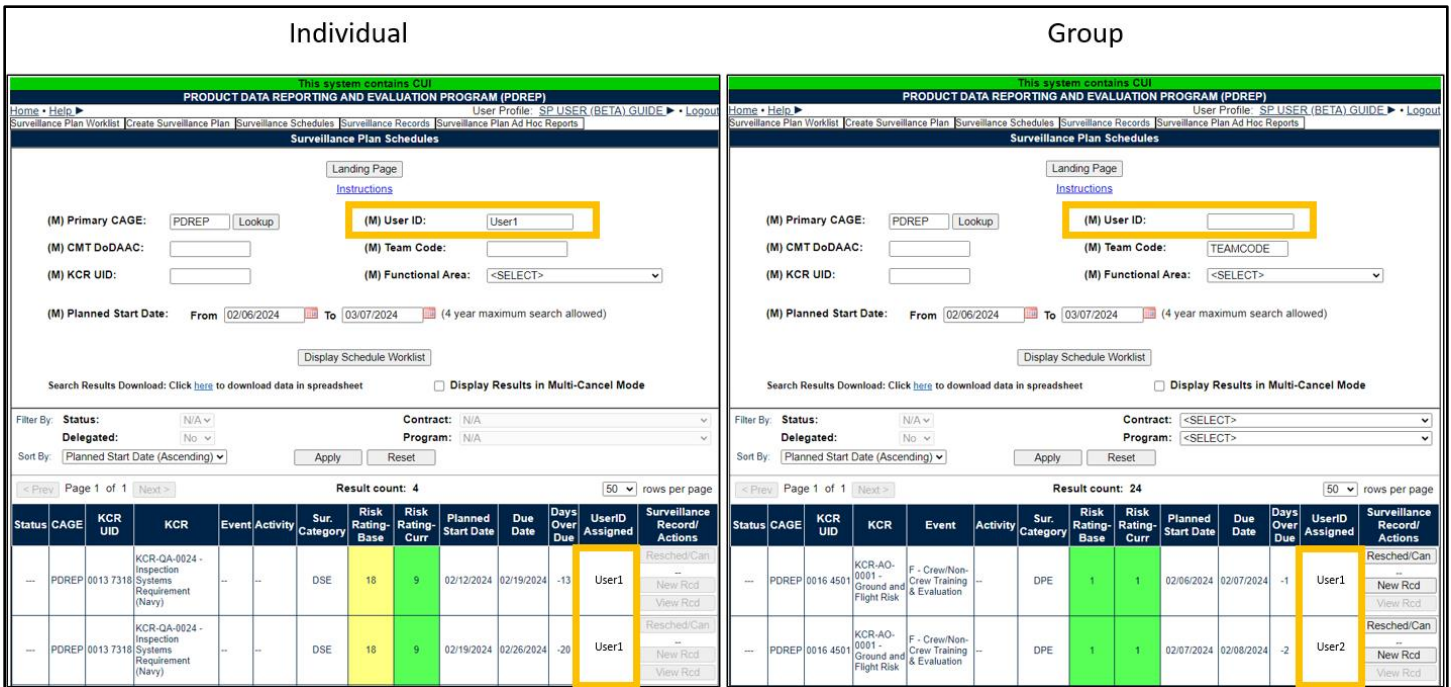
Figure 5.8

Filtering an individual schedule (based off the User ID) can be done for any user and by any user as shown on the left side of **Figure 5.8**. However, functionality is restricted to the user for which the occurrence populated. This means the ability to cancel an occurrence, reschedule an occurrence, create a Record or access a Record is limited to the individual listed in the "UserID Assigned" column.

When a User ID is not entered as shown on the right side of **Figure 5.8**, a group schedule will be returned displaying all assigned Functional Specialist associated with those KCR values entered. A larger example of an individual schedule can be seen in **Figure 5.9** and a group schedule can be seen on **Figure 5.10**.

Note: Apart from weekly oversight, returned schedules do not take into consideration weekends or Holidays. When a weekly frequency has been determined, the Scheduler will populate occurrences for Monday thru Fridays. Otherwise, the Scheduler does not take into consideration Saturdays, Sundays, or federal holidays.

Figure 5.9

Figure 5.10

Associated Table Columns for **Figure 5.10**

- **Activity:** The Activity associated with the KCR for which the occurrence is referencing. Field will display as "N/A" when lacking a Surveillance Activity in the KCR.

- **CAGE:** The CAGE Code of the contractor to whom the Surveillance oversight is attributed.

- **Days Over Due**: Starts counting after KCR is created. Shows negative numbers counting towards the Due Date in black text when today's date does not equal to or exceed the KCR's Due Date. When today's date is equal to the Due Date, "0" will be shown in black text. Once the Due Date passes and there is no completed Record with the scheduled occurrence, text will turn red and show a positive number counting how many days past the Due Date it has been. This will continue counting in red text until a Record is marked complete on that specific occurrence. Once complete, the number will remain the same.

    o To see a returned schedule with today's date *prior* to the Due Date with no complete Record attached, refer to **Figure 5.11a**.

    o To see a returned schedule with today's date *equaling* the Due Date with no complete Record attached, refer to **Figure 5.11b**.

    o To see a returned schedule with today's date *exceeding* the Due Date with no complete Record attached, refer to **Figure 5.11c**.

Note: Reopened Records will have black text if reopened before the Due Date and red text if opened after the Due Date.

- **Due Date:** Currently, Due Date is by default the Start Date of the next occurrence. The date will display in black font except for those occurrences considered past due.

- **Event:** The Event associated with the KCR for which the occurrence is referencing. Field will display as "N/A" when lacking a Surveillance Event in the KCR.

- **KCR:** Key Contract Requirement Number & Description for which the occurrence is referencing.

- **KCR UID:** The 8-digit unique identifier of the KCR for which the occurrence is referencing.

- **Planned Start Date:** This field populates the date for each occurrence to start with the expectation the surveillance Record should be created on this date but does not have to be completed. Planned Start Dates are generated on a calculation of the KCR's Start Date multiplied by the Frequency of which oversight should be performed. The date will display in black font except for those occurrences considered past due.

- **Record UID:** Unique identifier of an associated Record of the KCR.

- **Risk Rating Baseline**: The initial Risk Rating documented in the KCR for which the occurrence is referencing.

- **Risk Rating Current:** Most current Risk Rating associated with the KCR for which the occurrence is referencing.

- **Status:** The status (Draft, Overdue, Complete, etc.) of the occurrence. The values will display in black font except for those occurrences considered past due.

- **Sur. Category**: Type of surveillance evaluation (DPE, DSE, PE, SPE) identified within the KCR.

- **Surveillance Record/Actions:** Functions listed below. Functionality is restricted based on the User ID reviewing the schedule. Available options may include:

    o **Resched/Can:** Button to Cancel or Re-Schedule anticipated oversight. Users with supervisor of higher assess can reassign an occurrence to any other FS within the

same DoDAAC. This button will be grayed out if a user does not have supervisor or higher access.

- o **New Rcd:** Available only to the User ID assigned, this button opens the Records Page for the type of surveillance required as determined within the KCR.

- o **View Rcd:** Button to view the associated Record (limited to users with FS or higher access). It will populate for all Records, regardless of Record status.

- **User ID Assigned:** ID of the Assigned Functional Specialist within the KCR.

Note: Frequencies with a start date or occurrence date of February 29th will occur as February 28th for non-leap years.

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/06/2024	02/07/2024	-1	User1	Resched/Can -- New Rcd View Rcd
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/06/2024	02/07/2024	-1	User1	Resched/Can -- New Rcd View Rcd

Figure 5.11a

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
---	PDREP	0021 1039	KCR-NASA-0001 - Packaging, handling, and transportation	Cushioning Thickness	--	SPE	1	1	02/05/2024	02/06/2024	0	User1	Resched/Can -- New Rcd View Rcd
---	PDREP	0021 1040	KCR-NSEO-0001 - Naval Nuclear Propulsion Program (ANSTR-2000) NSEP	Oversight IAW NNPP FSIP Located in Cipher share	--	DPE	1	1	02/05/2024	02/06/2024	0	User1	Resched/Can -- New Rcd View Rcd

Figure 5.11b

Status	CAGE	KCR UID	KCR	Event	Activity	Sur. Category	Risk Rating-Base	Risk Rating-Curr	Planned Start Date	Due Date	Days Over Due	UserID Assigned	Surveillance Record/ Actions
--- OVERDUE	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	DPE	1	1	01/01/2024	01/02/2024	35	User1	Resched/Can -- New Rcd View Rcd
--- OVERDUE	PDREP	0016 4501	KCR-AO-0001 - Ground and Flight Risk	F - Crew/Non-Crew Training & Evaluation	--	DPE	1	1	01/02/2024	01/03/2024	34	User1	Resched/Can -- New Rcd View Rcd

Figure 5.11c

5.4.1 Changes to the Schedulers' Return

Changes to the KCR trickle down and effect the KCR itself and what is shown in the Scheduler and subsequently the contents of the Record. The KCR communicates these changes to the Scheduler immediately following the KCR's "Save" action. Once the Scheduler receives notification, the anticipated oversight (aka Scheduler) will automatically adjust its return based on the current KCR's values for Start Date, Frequency, and assigned FS. This same logic is applied when a KCR is moved from Not Warranted to Warranted or when a KCR's delegation status goes from Delegated to Not Delegated.

Since Surveillance Schedules are created in "Real Time", changes to data elements used to populate occurrences will be immediately applied to the Scheduler. This is true only for occurrences lacking an attached Record. When a Record is associated to an occurrence, the Scheduler ignores changes to the KCR for that oversight, keeping the Record-attached occurrence untouched.

For instance, when a change occurs to a KCR's Start Date, the Schedules Planned Start Date, Due Date and Days Over Due will automatically adjust their values to that of the KCR for all occurrences and reoccurrences lacking a Record. Since the Scheduler ignores those occurrences with an associated Record, no change is made to the Planned Start Date, Due Date or Days Over Due for these oversights.

5.5 Button Functionality

Buttons available on the Surveillance Plan Schedules page and their functionality are described below.
- **Apply:** Will further filter the Scheduled Worklist based on the additional filters entered.
- **Display Schedule Worklist:** Will display the scheduled list based on the criteria entered in required data fields.
- **Landing Page:** Navigates the user to the Surveillance Plan Landing Page associated with the CAGE Code.
- **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.
- **New Rcd:** Available only to the User ID Assigned**,** this button opens the Records Page for the type of surveillance required as determined within the KCR.
- **Open Rcd:** Available only to the User ID Assigned**,** this button is available after a Record has been created (**Figure 5.12**).
- **View Rcd:** Available only to the User ID Assigned**,** this button is clickable after a Record has been created and saved (**Figure 5.12**).
- **Re-Sched**: The button will open a new window where the user can choose to reschedule or cancel the anticipated oversight.
- **Reset:** Returns selections made to Filter & Sort back to their default status.

Note: Records accessed by way of the Scheduler will return the user to the Scheduler when the "Back" button is used.

Figure 5.12

Note: *The ability to Reschedule or Cancel an occurrence is restricted for Records marked in "Complete" status.*

- **Reschedule:** When selected, a Justification as to why the occurrence needs to be rescheduled is required along with a new Start Date & End Date of when the occurrence will begin its oversight and conclude. Values entered do not affect any other occurrence or series of occurrences (**Figure 5.13**).
  i. **Save:** Captures the request and reschedules the occurrence based on the new Start Date and End Date entered.
  ii. **Cancel:** Refreshes the page and returns to the Scheduler.

Figure 5.13

- **Cancel:** When selected, Rescheduled Date fields becomes inactive and only a Justification as to why the occurrence needs to be Canceled is required. Values entered do not affect any other occurrence or series of occurrences (**Figure 5.14**).
  i. **Save:** Captures the request and eliminates the occurrence from the Schedulers' return indefinitely.
  ii. **Cancel:** Refreshes the page and returns to the Scheduler.

Note: *Canceling an occurrence is an action that cannot be undone. Not even PDREP can reinstate an occurrence that has been canceled.*

Figure 5.14

5.6 Additional Features

5.6.1 Download

Download: Downloads return the schedule to a spreadsheet. If the return from the query/filter is greater than 500 rows, the user will be able to download the entirety of the return to a spreadsheet. Use the >here< hyperlink (**Figure 5.15**).

Figure 5.15

5.6.2 Page Counter

Page Counter: Enables the ability to toggle between pages when more than one page of data is returned from the query/filter as shown in **Figure 5.16**. The "Next" button produces the succeeding page where as the "Prev" button navigates back to the previous page.

Figure 5.16

5.6.3 Rows Per Page

Rows Per Page: By using the provided dropdown, this feature enables a larger returned schedule as determined by the selected number of rows to be displayed. Returned schedules default to a 50-row return but may be increased to 100, 250 or 500 (**Figure 5.17**).
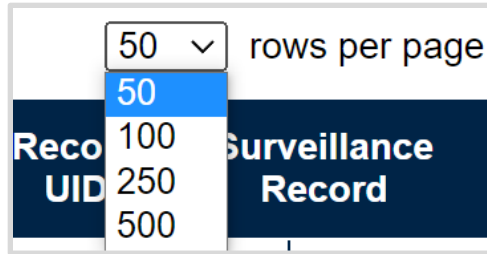
Figure 5.17

5.6.4 Multi-Cancel Mode

Supervisors can cancel multiple occurrences at once for an FS on the same DoDAAC by clicking the "Display Results in Multi-Cancel Mode" checkbox on the Scheduler Worklist (**Figure 5.18**). This checkbox may be clicked before or after clicking the "Display Schedule Worklist" button.
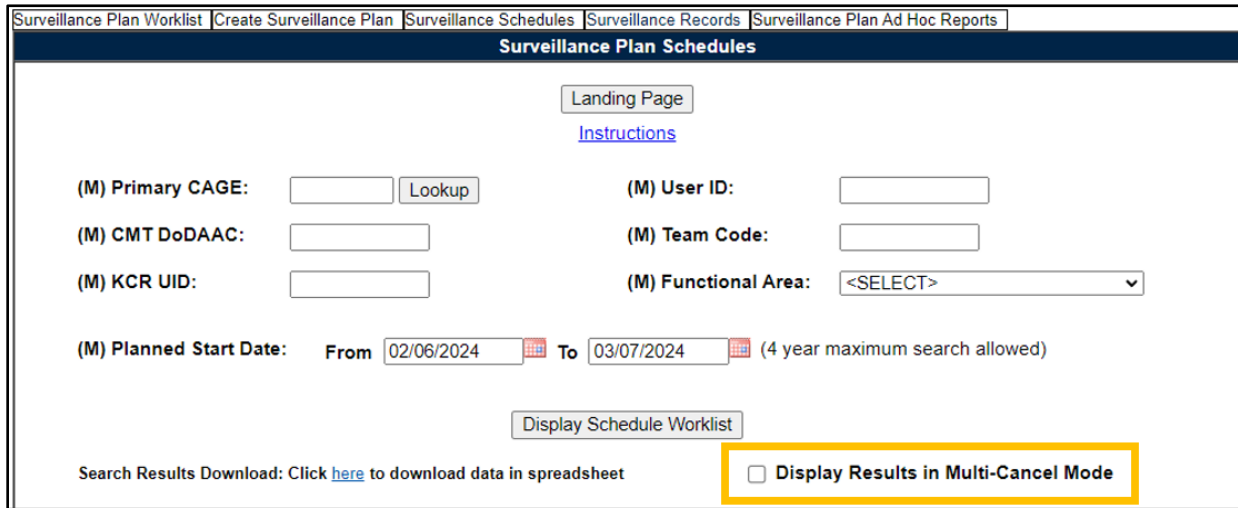
Figure 5.18

Once the checkbox is clicked and the user runs a schedule, the returned schedule will have an added column labeled "Select for Cancel" as well as a "Justification" section (**Figure 5.19**). Current functionality allows Supervisors to cancel multiple occurrences, not reschedule multiple occurrences.

Figure 5.19

If a supervisor selects multiple occurrences to cancel and does not provide a Justification, an error message will appear. **Figure 5.20** shows the error message after a supervisor attempts to cancel multiple occurrences without providing a Justification.

Figure 5.20

To cancel an occurrence, a Supervisor must click the checkbox of the associated row item(s), add a Justification, then click the "Cancel All Selected" button. After this button is clicked, the page will refresh, and a pop-up will ask the user if they wish to continue (**Figure 5.21**). The user can either click the "OK" or "Cancel" button.

- **OK**: This will proceed with the cancellation of the selected occurrence(s).
- **Cancel**: This will cancel the mass-cancel action and bring the user to the worklist screen.

Figure 5.21

Once the supervisor clicks the "OK" button in the pop-up, the occurrences will be immediately removed from the schedule. The screen will refresh to the worklist. The canceled occurrences will not populate in the schedule. **Figure 5.22** shows the Scheduler worklist results before and after the cancellations.

Figure 5.22

To return to the default worklist (non-multi-cancel mode), uncheck the "Display Results in Multi-Cancel Mode" checkbox. The page will automatically refresh to the default worklist after unchecking the box (**Figure 5.23**).

Figure 5.23

6 SEARCHING THE SP DATABSE – SP AD HOC

6.1 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 6.1**).

Figure 6.1

Selecting the Ad Hoc Reports link will navigate the browser to that tab within the application. The tab is also available at the top of the page within the modules (**Figure 6.2**).

Figure 6.2

Figure 6.3 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.

Figure 6.3

The Select Data Record dropdown, seen in **Figure 6.3**, has multiple data set options to choose from to pull different data elements for reporting:

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

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

6.2 Surveillance Plan (ALL) Dropdown

Top-level Surveillance Plan data elements are available under the Surveillance Plan (ALL) dropdown. Some Surveillance Plan data elements are also seen on the Plan Level Product Characteristics and KCR Risk Trend dropdowns. Detailed KCR information is included with the Plan level data elements.

When pulling reports within the Surveillance Plan (ALL) dropdown, you have data elements for the Plan, KCRs, and Records. If data elements for Records are selected, but the *Record UID is not, you may see the error in **Figure 6.4**.

Figure 6.4

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.

6.3 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 6.5**), it may appear rows are repeating or duplicating (**Figure 6.6**).

Figure 6.5

Figure 6.6

Figure 6.6 appears like there are duplicating rows of the NSN/Edit 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).

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)	SP Prod. Chara. Characteristic Classification	SP Prod. Chara. Description	SP Prod. Chara. End Item ID	SP Prod. Chara. ESA Identified-CC	SP Prod. Chara. Insp. Req.	SP Product Characteristic
PDREP		VALVES, NONPOWERED	4820		4820				Active	4820						
PDREP		TEST TEST	4820	123456789	4820123456789	123456789			Active	4820123456789						
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	12	153	C1	Active	DY4820123456789C1						
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	PART 1234	SERIAL 5678	C1	Active	DY4820123456789C1						
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	PARTNUMBER	SERIALNUM	C1	Active	DY4820123456789C1						
PDREP	DY	TEST TEST	4820	123456789	DY4820123456789C1	PART 1	SERIAL 1	C1	Active	DY4820123456789C1						

Figure 6.7

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.

6.4 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 apart of this report seen in **Figure 6.8**.

Figure 6.8

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 6.9**).

Figure 6.9

Any condition(s) or expression(s) may be used, but a Primary Location at minimum is recommended, with a KCR UID next (**Figure 6.10**).

Figure 6.10

Run the Query to populate a table representing the Risk Trend (**Figure 6.11**).

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

KCR Risk Trend - Record

Figure 6.11

Notes on the Risk Tend 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** <u>even if</u> 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.

6.5 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.

6.6 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.

6.7 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, an SPE-based IDR has fields for the Inspection System Indicator, Command Media, and Process Compliance and Effectiveness Assessments. These fields do not exist on a DPE IDR and will not populate values in the return table. Similarly, the IDR Manufacturing Spec. and IDR Material Spec. are only available on DPE IDR Records (**Figure 6.12).**

Note: Repeating rows have been removed for ease of reading.

IDR Data Elements - Record													
*IDR UID	*KCR UID	*Primary Location	*RECORD UID	IDR Actual Hours	IDR AQL	IDR Associated KCRs	IDR Batch/Lot/Heat	IDR Command Media	IDR Completed	IDR Completion Date	IDR Date Closed	IDR Def. Req. CA	IDR Evaluation Criteria
PDREP-0224-0001-001	00211039	PDREP	PDREP-0224-0001	50.0				N	Y	02/07/2024	02/07/2024	(CM) DEFICIENCY(IES) REQUIRING CORRECTIVE ACTION TEST	(M) EVALUATION CRITERIA TEST
PDREP-0224-0004-001	00211040	PDREP	PDREP-0224-0004	10.0	0.4% AQL (Critical)		BATCH/LOT/HEAT TEST		Y	02/07/2024	02/07/2024	(CM) DEFICIENCY(IES) REQUIRING CORRECTIVE ACTION TEST	(M) EVALUATION CRITERIA TEST
PDREP-0224-0003-001	00211041	PDREP	PDREP-0224-0003						N				
PDREP-0224-0002-001	00211040	PDREP	PDREP-0224-0002						N				

Figure 6.12

6.8 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, or that rows are populating to match the number of Product Characteristics associated with each NSN/End Item. An IDR example is listed below.

Build the query only including the IDR *End Item values (**Figure 6.13**).

Figure 6.13

Click "Run Query" to populate the results in **Figure 6.14**.

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 6.14

There are three IDRs that repeat on multiple rows in **Figure 6.14**. This typically indicates there are multiple Product Characteristics associated with each of those IDRs. **Figure 6.15** shows the results after adding the Product Characteristics to the search query.

IDR Level Product Characteristics - Record													
*IDR UID	*KCR UID	*Primary Location	*RECORD UID	IDR **End Item	IDR **End Item Description	IDR **End Item NSN	IDR **End Item Part No./Unique ID	IDR **End Item Serial No.	IDR Prod. Chara. Characteristic Classification	IDR Prod. Chara. Description	IDR Prod. Chara. ESA Identified-CC	IDR Prod. Chara. Insp. Req.	IDR Product Characteristic
PDREP-0224-0005-001	00211040	PDREP	PDREP-0224-0005	AH14	PRODUCT SERVICE DESCRIPTION	AH14	UNIQUE IDENTIFIER	SERNUM123	MINOR	DESCRIPTION	N/A	Customer Mandatory	Dimension
PDREP-0224-0005-001	00211040	PDREP	PDREP-0224-0005	AH14	PRODUCT SERVICE DESCRIPTION	AH14	UNIQUE IDENTIFIER	SERNUM123	MAJOR	DESCRIPTION OF CHARACTERISTIC	Yes	DCMA Risk Based	Process Output
PDREP-0224-0002-001	00211040	PDREP	PDREP-0224-0002	AH14		AH14			MINOR	DESCRIPTION	N/A	Customer Mandatory	Dimension
PDREP-0224-0005-001	00211040	PDREP	PDREP-0224-0005	AH14	PRODUCT SERVICE DESCRIPTION	AH14	UNIQUE IDENTIFIER	SERNUM123	UNKNOWN	PC DESC	N/A	DCMA Risk Based	Other

Figure 6.15

The results are now limited by only the IDRs that have NSN End Items with Product Characteristics associated to those NSN End Items. Repeating rows were due to the unique Product Characteristics for each IDR. The bottom row is an 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.

6.9 Additional Ad Hoc Support

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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 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 6.16)**, or can be found by clicking the User Guides selection under the Help menu on the top of any PDREP window (**Figure 6.17**).

Guides and Manuals

PDREP Guides and Manuals

General
- Attaching a file in PDREP *September 2021*
- Customer Service Request (CSR) *June 2019*
- Search Tools *May 2022*
- User Access Request *October 2023*

PDREP Tools
- ADHOC Search *September 2022*
- Contract Award & Delivery (CAD) Data Application *October 2023*
- Contractor Profile *May 2020*
- DoD Corrective Action Request (CAR) *October 2023*
- Engineering Referral System (ERS) *October 2023*
- Material Inspection Records (MIR) *October 2023*
- Quality Assurance Letter of Instruction (QALI) *May 2023*
- Receipt Inspection Management System (RIMS) *October 2023*
- SPPI Bulletin (SB) *January 2022*
- Supply Action Module (SAM) *October 2023*
- Supplier Audit and Assessment (SAA) *September 2022*
- Supply Discrepancy Report (SDR) *October 2023*
- Survey, Special Quality, & Test Records Applications *October 2023*

Other Programs
- Exhibit & Shipment Tracking *October 2023*
- PDREP Prime Contractor *January 2020*
- Warranty & Source of Repair Tracking *September 2022*

Product Quality Deficiency Reports (PQDR)
- Originator Documents
  - Originator Instructions *October 2023*
  - Local Purchase Instructions *October 2023*
- Screening Point Documents
  - Screening Point Instruction *October 2023*
  - Army Master Screener Instruction *October 2023*
- Action Point Documents
  - Action Point Instructions *October 2023*
  - Army Action Officer Instruction *October 2023*
- Support Point Documents
  - 1227 Instructions *October 2023*
  - QAR Investigation *October 2023*
  - DRPM Investigation *October 2023*

DCMA Tools
- DCMA Corrective Action Request (CAR) *October 2023*
- DCMA Letter of Delegation (LOD) *October 2023*
- DCMA Supplier Risk System (SRS) *January 2022*
- DCMA Surveillance Plan (SP) KTR Details *October 2023*
- DCMA Surveillance Plan (SP) Records *October 2023*
- DCMA Surveillance Plan (SP) Scheduler *October 2023*

Figure 6.16

PRODUCT DATA REPORTING AND EVALUATION PROGRAM (PDREP)

Home • Help ▶
User Profile: DCMA (ALPHA) USER ▶ • Logout
Surveillance Plan W

Contact Help Desk with comment, question, or feedback

Plan Surveillance Plan Ad Hoc Reports

Surveillance Plan Ad hoc Report

Make a User Access or User Account Change

sly saved Ad hoc report:
oc from **My Ad hocs**
y **Ad hoc** button
lete a previously saved ad hoc, select **Manage My Ad hocs** button

View the user guides for help

View the FAQs to see if the answer to my question is there

se steps to create new ad hoc report:
Record and click **Get Data Element**
more Data Elements
umns and/or **Delete Columns** to set the Selected Data Elements List
ement and click **Add Where** to set the where condition(s)
ession and Value in the Where clause
hen one where condition select a Logical Expression

Suggest a change to software or report a problem with the website

7. Click on **RUN QUERY**

Figure 6.17

7 SUMMARY

This concludes the DCMA Surveillance Plan (SP) Scheduler 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 <u>not</u> 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 A1.2** 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 our 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 non-unique data (CAGE) is tied to both unique values (Contract Number) appears as two rows in the data. As described in **Appendix 1**, pivot tables and other spreadsheet manipulation methods are the best way to separate out this data once pulled via the Ad Hoc tool.

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

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

Surveillance Plan Data Dictionary

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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
History Recipient's Name and Email	Background	POC	Recipient of a message (Reviews / General Messages) if relevant in History	CHAR	40
History Recipients DoDAAC	History	To Activity	DODAAC of the History Notif. Recipient User.	CHAR	6
History Sender's Name and Email	History	POC	User ID who made the change or History Action	CHAR	40
History Sender's DoDAAC	History	From Activity	DoDAAC of user who made change to Record	CHAR	6
IDR **End Item	Record IDR	Background	Same as Plan Level NSN	NUMBER	22
IDR **End Item Description	Record	*End Item Description	Text entered at IDR Product/Service Description.	VARCHAR2	200
IDR **End Item NSN	Record IDR	NSN	End Item NSN Selected for IDR	NUMBER	75
IDR **End Item Part No./Unique ID	Record	*End Item Part No./Unique ID	Text entered at IDR Part Number/Unique Identifier.	VARCHAR2	1,000
IDR **End Item Serial No.	Record	*End Item Serial No.	Text entered at IDR Serial Number.	VARCHAR2	200
IDR Actual Hours	Record IDR	IDR Actual Hours	Actual hours to complete IDR	VARCHAR2	6
IDR AQL	Record IDR	AQL	IDR AQL information	VARCHAR2	4
IDR Assigned Functional Area	Record IDR	Assigned Functional Area	KCR assigned Functional Area	CHAR	25
IDR Associated KCRs	Record IDR	Associated KCRs	KCRs associated with IDR	NUMBER	22
IDR Batch/Lot/Heat	Record IDR	Batch/Lot/Heat	IDR Bat/Lot/Heat information	VARCHAR2	50
IDR Command Media	Record IDR	Command Media Adequate	Y/N indicator for Command Media Adequate	CHAR	1
IDR Completed	Record IDR	Background	Indicator the IDR is completed	CHAR	1
IDR Completion Date	Record IDR	IDR Completion Date	Date indicated within the IDR "(M) Completion Date" Field	Date (DD-MMM-YY)	7
IDR Contract	Record IDR	Contract	Contract for the IDR	NUMBER	22
IDR Contract Line Item/ PO	Record IDR	IDR Contract Line Item/ Purchase Order	Line Item/Purchase Order for the IDR	VARCHAR2	50
IDR Contractors Command Media	Record IDR	Contractors Command Media	Text field to enter Command Media details.	CHAR	50
IDR Count	Record IDR	Background	Count of IDRs associated with a Record	NUMBER	22
IDR Created User ID	Record IDR	Background	User ID who created the IDF	CHAR	6

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
IDR Creation Date	Record IDR	Background	Date the IDR was created	Date (DD-MMM-YY)	7
IDR Date Closed	Record IDR	Background	(Action) Date user successfully saved the Record as "Complete" - User Action	Date (DD-MMM-YY)	7
IDR Def. Req. CA	Record IDR	(CM) Deficiency(ies) Requiring Corrective Action	Narrative field for why the deficiency requires corrective action.	CHAR	1
IDR Drawing No.	Record IDR	Drawing Number	Drawing Number of the IDR	CHAR	50
IDR Evaluation Criteria	Record IDR	Evaluation Criteria	Narrative field for IDR evaluation criteria information	CHAR	50
IDR Evaluation Items	Record IDR	Evaluation Item	Narrative field for IDR evaluation item information	CHAR	50
IDR Evaluation Results	Record IDR	Result	Results of IDR Evaluation. S=Satisfactory, U=Unsatisfactory	CHAR	1
IDR Insp. System Ind. Other Stand.	Record IDR	Inspection System Indicator	Inspection System Indicator and other standard information	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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
IDR Material Spec.	Record IDR	Material Spec	IDR Material Specifications text box	VARCHAR2	50
IDR Notes	Record IDR	Notes	Notes regarding IDR	VARCHAR2	3,000
IDR Proc. Compliance Assessment	Record IDR	Process Compliance Assessment	Narrative field to enter process compliance assessment information	CHAR	50
IDR Proc. Effectiveness Assessment	Record IDR	Process Effectiveness Assessment	Narrative field to enter process effectiveness assessment information	CHAR	50
IDR Proc. Elem. Desc.	Record IDR	Description	Description of Process Element	VARCHAR2	500
IDR Proc. Elem. Notes	Record IDR	Notes	Notes associated to the Process Element	CHAR	255
IDR Proc. Elem. Process Findings	Record IDR	Process Findings	Dropdown under the definition to select Process Findings	NUMBER	22
IDR Proc. Elem. Results	Record IDR	Results	Results of Process elements	CHAR	15
IDR Proc. Elem. Review Date	Record IDR	Review Date	Date of process element review	Date (DD-MMM-YY)	7
IDR Process Element	Record IDR	Process Element	The Process Elements Table within the IDR displayed as one cell	CHAR	15
IDR Prod. Chara. Characteristic Classification	Record IDR	(M) Characteristic Classification	Dropdown to select Characteristic Classification.	CHAR	25
IDR Prod. Chara. Description	Record IDR	(M) Description	Text field to enter Product Characteristic Description.	CHAR	100
IDR Prod. Chara. ESA Identified-CC	Record IDR	(M) ESA Identified-CC	Dropdown to select ESA Identified-CC.	CHAR	5
IDR Prod. Chara. Insp. Req.	Record IDR	(M) Insp. Req.	Dropdown to select Product Characteristic Inspection Requirement.	CHAR	25
IDR Product Characteristic	Record IDR	(M) Product Characteristic	Dropdown to select Product Characteristic type.	CHAR	25
IDR Release Method	Record IDR	Release Method	Dropdown to select release method	VARCHAR2	4
IDR Remote Surv.	Record IDR	Remove Surveillance	Indicator checkbox of Remote Surveillance	CHAR	1
IDR ReOpen Date	Record IDR	Background	Date IDR reopened	Date (DD-MMM-YY)	7

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
IDR ReOpen User ID	Record IDR	Background	User ID who reopened the IDR	CHAR	6
IDR Requirement Reference	Record IDR	Requirement Reference	Narrative field to enter IDR requirement reference information	CHAR	50
IDR Status	Record IDR	IDR Status	Status of IDR D=Draft, C=Complete	CHAR	1
IDR Surveillance Category	Record IDR	Inspection Details Report (IDR) for System/Process Evaluation, Progress Evaluation, Deliverable Product Evaluation, Deliverable Service Evaluation	KCR Surveillance Category	CHAR	50
IDR Surveillance Event	Record IDR	Surveillance Event	KCR Surveillance Event	CHAR	50
IDR Surveillance Techniques	Record IDR	Surveillance Technique(s)	Multiple check boxes to identify all applicable surveillance techniques on the IDR	CHAR	1
IDR Virtual Surv.	Record IDR	Virtual Surveillance	Indicator checkbox of Virtual Surveillance	CHAR	1
KCR Applicable Contract(s)	KCR	Applicable Contract(s)	List is comprised of contracts added to the KCR separated by a comma.	CHAR	9999
KCR Applicable Program(s)	KCR	Applicable Program(s)	List is comprised of programs added to the KCR separated by a comma.	CHAR	9999
KCR Applicable Sub-Location(s)	KCR	Applicable Surveillance Location(s)	List is comprised of the sub-locations added to the KCR separated by a comma	CHAR	9999
KCR Assigned FS DoDAAC	KCR	Background	The Assigned Functional Specialist's primary DoDAAC retrieved from their user profile	CHAR	6
KCR Assigned FS Email	Background	N/A	List of assigned Functional Specialist email retrieved from the user profile separated by a comma.	CHAR	100
KCR Assigned FS ID	Background	N/A	List of User IDs from the Assigned Functional	CHAR	10

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			Specialist on a KCR retrieved from User profile separated by a comma		
KCR Assigned FS Name	KCR	Assigned Functional Specialist(s)	List of Names from the Assigned Functional Specialist on a KCR separated by a comma	CHAR	9999
KCR Assigned FS Region	KCR	Region	List of Region from the Assigned Functional Specialist on a KCR separated by a comma	CHAR	9999
KCR Assigned FS Team	KCR	Team Code	List of Team Codes from Assigned Functional Specialist on a KCR separated by a comma	CHAR	9999
KCR Assigned Functional Area	KCR	Assigned Functional Area	Assigned functional area of the KCR	CHAR	150
KCR Created Date	Background	N/A	Date the KCR was created	Date (DD-MMM-YY)	7
KCR Creator DoDAAC	Background	N/A	DoDAAC of user who added KCR; Updates to current value on User's profile.	CHAR	6
KCR Creator Region Literal	Background	N/A	Region of user who added KCR; Updates to current value on User's profile.	CHAR	100
KCR Creator Team Code	Background	N/A	Team Code of user who added KCR; Updates to current value on User's profile.	CHAR	100
KCR Creator User ID	Background	N/A	User ID of user who added KCR	CHAR	50
KCR Creator User Name	Background	N/A	User Name of user who added KCR	CHAR	50
KCR End Date	KCR	End Date	KCR planned End Date	Date (DD-MMM-YY)	7
KCR Incoming from LOD/IDRL	KCR	KCR Incoming from LOD/IDRL	Yes/No Dropdown to indicate if KCR is incoming from LOD/QALI	CHAR	3
KCR Incoming LOD DCN	KCR	LOD DCN	DCN of LOD/QALI Record	VARCHAR2	15
KCR Incoming LOD RCN	KCR	LOD RCN	RCN of LOD/QALI Record	VARCHAR2	15
KCR LOD CAGE Code	KCR	CAGE Code	CAGE Code with the associated	CHAR	5

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			incoming LOD RCN/DCN		
KCR LOD DCN	KCR	LOD DCN	Document Control Number of the Incoming LOD associated to the KCR	VARCHAR	20
KCR LOD RCN	KCR	LOD RCN	Record Control Number of the Incoming LOD associated to the KCR	VARCHAR	20
KCR Other Requirements	KCR	Other Agency Assigned Work Requirements	Text field available to describe other agency assigned work requirements- notably for KCRs ending in "A002"	CHAR	1000
KCR Risk - Allocated Hours	KCR	Allocated Hours	The time planned (in hours) to complete one event. This includes travel, preparation, and documentation.	CHAR	6
KCR Risk - Baseline	KCR	Rick Rating, Baseline	Initial Risk Rating of the KCR	Number	4
KCR Risk - Consequence	KCR	Risk Consequence	Auto-populated calculation	CHAR	1
KCR Risk - Cost Rating	KCR	Risk Consequence – Cost	Numeric 1-5 Selection for Lowest to Highest Risk for Cost	CHAR	1
KCR Risk - Cost Rationale	KCR	Rationale for Risk Consequence – Cost	Required when a numerical value is added to the Risk Consequence requiring a narrative in the text field to discuss reasons for selecting a particular option for Cost Risk.	CHAR	1000
KCR Risk - Likelihood Rating	KCR	Risk Likelihood	Numeric 1-5 Selection for Lowest to Highest Risk for Risk Likelihood	CHAR	1
KCR Risk - Likelihood Rationale	KCR	Rationale for Risk Likelihood	Narrative text field to discuss reasons for selecting a particular option for Risk Likelihood. Required even if Surveillance Warranted is set to "No".	CHAR	1000

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
KCR Risk - Performance Rating	KCR	Risk Consequence – Performance	Numeric 1-5 Selection for Lowest to Highest Risk for Performance	CHAR	1
KCR Risk - Performance Rationale	KCR	Rationale for Risk Consequence – Performance	Required when a numerical value is added to the Risk Consequence requiring a narrative in the text field to discuss reasons for selecting a particular option for Performance Risk.	CHAR	1000
KCR Risk - Schedule Rating	KCR	Risk Consequence – Schedule	Numeric 1-5 Selection for Lowest to Highest Risk for Schedule	CHAR	1
KCR Risk - Schedule Rationale	KCR	Rationale for Risk Consequence – Schedule	Required when a numerical value is added to the Risk Consequence requiring a narrative in the text field to discuss reasons for selecting a particular option for Schedule Risk.	CHAR	1000
KCR Start Date	KCR	Start Date	The date the surveillance evaluation is planned to begin.	Date (DD-MMM-YY)	7
KCR Surveillance Activity	KCR	Surveillance Activity	Based on the Surveillance Event selected, choose Surveillance Activity from the dropdown. The Surveillance Sub-Activity data field may then populate if relevant to the selection.	CHAR	100
KCR Surveillance Category	KCR	Surveillance Category	Type of Surveillance	CHAR	35
KCR Surveillance Complete	KCR	Surveillance Complete	Drop down to indicate if the surveillance is complete.	CHAR	1
KCR Surveillance Event	KCR	Surveillance Event	Based on the KCR number & Description selected, choose the Surveillance Event from the dropdown. The Surveillance Activity data field may then	CHAR	100

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			populate if relevant to the selection.		
KCR Surveillance Execution	KCR	Surveillance Execution Info	Text Field that allows surveillance execution information to be entered	CHAR	1000
KCR Surveillance Frequency	KCR	Frequency of Surveillance	The frequency of the planned Surveillance.	CHAR	35
KCR Surveillance Intensity	KCR	Intensity of Surveillance	Intensity selected that determine the appropriate level of oversight of a contractor to meet contractual requirements.	CHAR	45
KCR Surveillance Location	KCR	Surveillance Location	Location of surveillance - selected via dropdown	CHAR	45
KCR Surveillance Subactivity	KCR	Surveillance Sub-Activity	Based on the Surveillance Activity selected, choose the Surveillance Sub-Activity from the dropdown.	CHAR	3
KCR Surveillance Warranted	KCR	Surveillance Warranted*	Indicates if surveillance is to be performed on the selected KCR Requirements. Default value is "Yes".	CHAR	1
KCR Surveillance War Resource	KCR	Resources	Radio button to indicate Surveillance Warranted is due to Resources	CHAR	1
KCR Surveillance War Risk	KCR	Risk	Radio button to indicate Surveillance Warranted is due to Risk	CHAR	1
KCR Unallocated Hours	KCR	Unallocated Hours	Field to enter Unallocated hours, including dropdown for 15 minute intervals.	NUMBER	12
KCR Will Be Delegated Indicator	KCR	KCR will be delegated	Yes, No or RGQA selection indicating if the KCR Requirements will be delegated via a LOD.	CHAR	1

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
KCR# & Description	KCR	KCR# & Description	Based on the Assigned Functional Area selected, choose the KCR# & Description from the dropdown. The Surveillance Events data field will then populate based off this selection.	CHAR	150
KTR Address	Background	N/A	Address of primary location	CHAR	36
KTR Business Model	Plan	Business Model	Business model of the prime location of the SP	CHAR	4
KTR City	Background	N/A	City of primary location	CHAR	36
KTR Name	Background	N/A	Name of primary location	CHAR	36
KTR POC Email	Plan	POC E-mail	User-editable field to denote the email address of the primary POC associated with the surveillance location.	CHAR	100
KTR POC Functional Area	Plan	Functional Area	Dropdown to select the functional area associated with the KTR POC.	CHAR	30
KTR POC Name	Plan	POC Name	User-editable field to denote the primary POC associated with the surveillance location.	CHAR	30
KTR POC Phone Number	Plan	POC Phone	User-editable field to denote the phone number of the primary POC associated with the surveillance location.	CHAR	20
KTR POC Title	Plan	POC Title	User-editable field to denote the job title of the primary POC associated with the surveillance location.	CHAR	30
KTR State	Background	N/A	State associated with the Primary Location CAGE	CHAR	2
Next Evaluation Due Date	Scheduler	Background	Calculated date of next surveillance based on start date and frequency	Date (DD-MMM-YY)	7

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
Next Evaluation Due Date Series	Background	N/A	Calculated next 20 date of surveillance based on start date and frequency	Date (DD-MMM-YY)	7
Rec. *End Item Description	Record	*End Item Description	Text entered at the Record level	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
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	CHAR	1

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			THE RECORD AND A 'N' IF THERE IS NO ATTACHMENT.		
Rec. Closed Date	Record	Closed Date	Date user successfully saved the Record as "Complete" - User Action	Date (DD-MMM-YY)	7
Rec. Completed	Record	Completed	Action - Did Record owner marked & saved the Record as complete	CHAR	1
Rec. Completion Date	Record	Completion Date	Date indicated within the Record "(M) Completion Date Field"	Date (DD-MMM-YY)	7
Rec. Count	Record	Count	Number of Records associated to a KCR	NUMBER	22
Rec. Creator	Record	FS User ID	User ID who created the Record	VARCHAR2	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	VARCHAR2	3,000
Rec. Evaluation Item	Record	Rec. Evaluation Item	Evaluation item on Record	VARCHAR2	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	VARCHAR	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	VARCHAR	20

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
			when pulling from the ad hoc.		
Rec. LOD RCN	Record	LOD RCN	Record Control Number of the Incoming LOD of the KCR for the Record. **Note:** this data element will only be visible for completed Records when pulling from the ad hoc.	VARCHAR	20
Rec. OnD	Record	Background	Distinguishes if this is an on-demand Record type or not	CHAR	1
Rec. OnD End Date	Record	End Date	End date within the on-demand Record	Date (DD-MMM-YY)	7
Rec. OnD End Overdue	Record	Status	On demand Record that has met or exceeded their end date and requires attention.	Date (DD-MMM-YY)	7
Rec. OnD Start Date	Record	Start Date	Start date within the on-demand Record	Date (DD-MMM-YY)	7
Rec. OnD Status	Record	Status	Status of On Demand Record. D=Draft, C=Complete	CHAR	1
Rec. Owner - DoDAAC	Record-Background	Assigned FS	DoDAAC of the user who is associated (responsible) for the Record.	VARCHAR2	6
Rec. Owner - Email	Record	FS Email	Email of the user who is associated (responsible) for the Record.	VARCHAR2	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	VARCHAR2	50
Rec. Owner - Team Code	Record-Background	Background	Team Code of the user who is associated (responsible) for the Record.	VARCHAR2	6
Rec. Owner - User ID	Record	FS User ID	User ID who is associated (responsible) for the Record. The Assigned FS of the Record	CHAR	6

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
Rec. Prime KTR CAGE Code	Record	Prime KTR CAGE Code	Prime KTR CAGE Code	VARCHAR2	12
Rec. ReAssign Date	Record	Background	Date a Record was reassigned	Date (DD-MMM-YY)	7
Rec. ReAssign User ID	Record	Background	User ID who reassigned a Record - From	CHAR	6
Rec. Remote Surv.	Record	Remote Surv.	Remote surveillance indicator	CHAR	1
Rec. ReOpen Date	Record	Background	Date a Record was reopened	Date (DD-MMM-YY)	7
Rec. ReOpen User ID	Record	Background	User ID who reopened a Record - From	CHAR	6
Rec. Requirement Reference	Record	Requirement Reference	Narrative field for requirement reference(s)	VARCHAR2	3,000
Rec. Results	Record	Evaluation Results	Results of Record	VARCHAR2	100
Rec. Status	Record	Status	Status of the Record. D=Draft, C=Complete, A=Reassigned, O=Reopened	CHAR	1
Rec. Surveillance Category	Record	System/Process Evaluation, Progress Evaluation, Deliverable Product Evaluation, Deliverable Service Evaluation	KCR Surveillance Category	CHAR	50
Rec. Surveillance Tech.	Record	Surveillance Technique(s)	Techniques used for surveillance listed in comma separated field.	CHAR	1
Rec. Virtual Surv.	Record	Virtual Surv.	Virtual surveillance indicator	CHAR	1
Rejected Disapproval Comments	Plan	Disapproval comments	Rejected review disapproval comments narrative	VARCHAR2	200
Schedule Status	Scheduler	Status	Status of KCR occurrence within the Scheduler	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

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
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
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	VARCHAR	6
SO Resch. User Team Code	Scheduler	Background	Team Code of the User who reschedules an occurrence	VARCHAR	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	VARCHAR2	200

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
SP Attachment CUI Category	Attachments	CUI Marking	CUI Markings applied to the attachment	CHAR	1
SP Attachment File Description	Attachments	Description	Attachment description	CHAR	500
SP Attachment File Name	Attachments	File Name	Attachment file name	CHAR	100
SP Attachment File Size	Attachments	File Size	Attachment file size	CHAR	25
SP Attachment ID	Attachments	Background	Auto-populated unique attached ID	CHAR	20
SP Attachment Limited Distribution Control (LDC)	Attachments	Limited Distribution Control (LDC)	Attachment limited distribution controls	CHAR	1
SP Attachment User ID	Attachments	Uploaded By	User ID who uploaded the attachment	CHAR	6
SP Contract Number	Plan	Contract Number	Contract Number associated with the plan	CHAR	50
SP Contract Status	Plan	Status	Status of an Applicable Contract within the KTR Details page. May show as "Active" or "Archived".	CHAR	10
SP Contract Value (USD)	Plan	Contract Value (USD)	Dollar value of the contract	CHAR	15
SP Created Year	Background	N/A	Year plan was created	CHAR	4
SP Creation Date	Background	Background	Added Date	Date (DD-MMM-YY)	7
SP Creator DoDAAC	Background	N/A	DoDAAC of User who created/added plan at time of creation	CHAR	6
SP Creator FS Name	Background	Background	User ID of the user who added to Surveillance Plan	CHAR	12
SP Creator User ID	Background	Background	User ID who created the plan	CHAR	1
SP End Item COG	Plan	COG	Two-position alphanumeric code associated with the Navy Item Manager for the associated NSN.	CHAR	2
SP End Item Description	Plan	Product/Service Description	Product/Service Description	CHAR	200
SP End Item FSC	Plan	FSC	The Federal Supply Class codes are four numeric digits identifying the general group of the material.	CHAR	4

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
SP End Item NIIN	Plan	NIIN	National Item Identification Number is a nine-digit code that uniquely identifies an item. Entering the NIIN will automatically populate the COG, FSC, SMIC, and Product Description as relevant.	CHAR	9
SP End Item NSN	Background	National Stock Number	Ad hoc query field that allows the NSN to be displayed with one selection	NUMBER	22
SP End Item Part Number	Plan	Part Number	Part number of the material	CHAR	25
SP End Item Serial Number	Plan	Serial Number	Serial number of the material	CHAR	20
SP End Item SMIC	Plan	SMIC	The Special Material Identification Code (SMIC) is a two-position alphanumeric code used by the Navy to categorize material under basis of source/quality control, technical control, or various procurement or handling controls.	CHAR	2
SP End Item(s)	Plan	Background	Combination of NSN items COG, FSC, NIIN, SMIC.	NUMBER	22
SP End Item Status	Plan	Status	Status of a specific end item located on the KTR Details page. May show "Active" or "Archived"	CHAR	10
SP Prod. Chara. Characteristic Classification	Plan	(M) Characteristic Classification	Dropdown to select Characteristic Classification.	CHAR	25
SP Prod. Chara. Description	Plan	(M) Description	Text field to enter Product Characteristic Description.	CHAR	100
SP Prod. Chara. ESA Identified-CC	Plan	(M) ESA Identified-CC	Dropdown to select ESA Identified-CC.	CHAR	5
SP Prod. Chara. Insp. Req.	Plan	(M) Insp. Req.	Dropdown to select Product Characteristic Inspection Requirement.	CHAR	25

Ad Hoc Element Name	Primary Web Page Name	Web Page Label	Definition	Field Type	Number of characters
SP Product Characteristic	Plan	(M) Product Characteristic	Dropdown to select Product Characteristic type.	CHAR	25
SP Program Code	Plan	(Not Labelled; part of the data)	DoD Program that DCMA is providing surveillance associated with - DCMA short name	CHAR	5
SP Program Status	Plan	Status	Status of an Applicable Program located on the KTR Details page. May be "Active" or "Archived".	CHAR	10
SP Program Type	Plan	List	PMBI / DAI / NSEO Selection	CHAR	5
SP Program(s)	Plan	Program Name	DoD Program that DCMA is providing surveillance associated with - Full Name	CHAR	500
SP Status	Plan	Status	Status of the Surveillance Plan.	VARCHAR2	8
Sub-KTR Business Model	Plan	Sub-Location Business Model	Sub-Location Business Model	CHAR	4
Sub-KTR CAGE/UEI	Plan	Sub-Location	Sub-location CAGE Code or UEI	CHAR	12
Sub-KTR POC Email	Plan	Sub-Location Email	Email of sub-location POC	CHAR	100
Sub-KTR POC Name	Plan	Sub-Location POC	Name of sub-location POC	CHAR	25
Sub-KTR POC Phone	Plan	Sub-Location Phone Number	Phone Number for sub-location POC	CHAR	20
Sub-KTR Type	Plan	Background	Dropdown to select if sub-location has CAGE or UEI.	CHAR	4
Submitted for Review to	Plan	Background	User ID of the person receiving the review request	VARCHAR2	12
Supervisor Rejected Date	Background	N/A	Date plan was rejected	Date (DD-MMM-YY)	7
Supervisor Reviewed Date	Background	N/A	Date plan was reviewed	Date (DD-MMM-YY)	7
Supervisor Submit For Review Date	Plan	N/A	Date submitted for Review (Generic)	Date (DD-MMM-YY)	7
Updated User ID	Background	N/A	User ID of last user to update plan	CHAR	12