



Enter Requirement Package



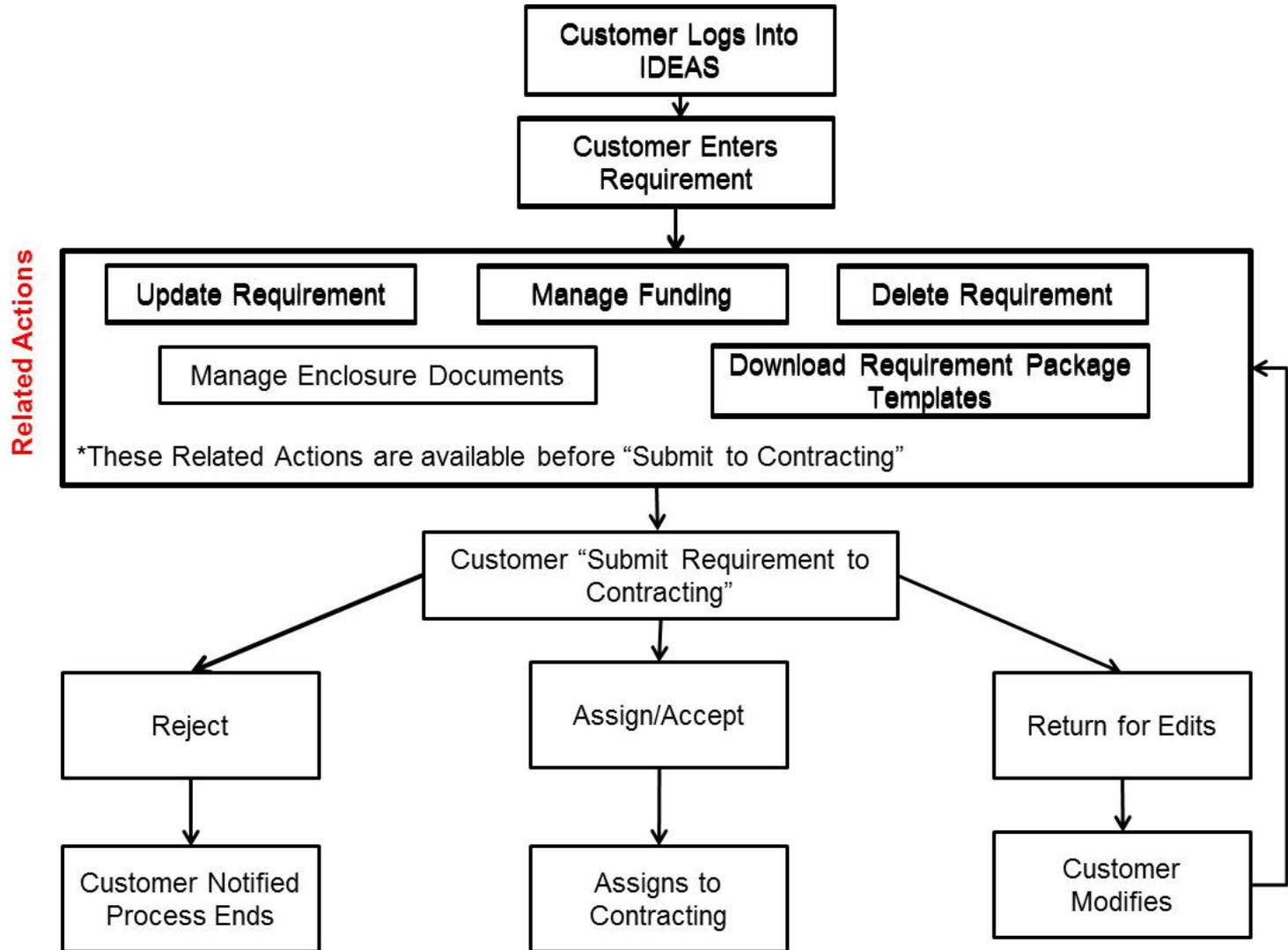
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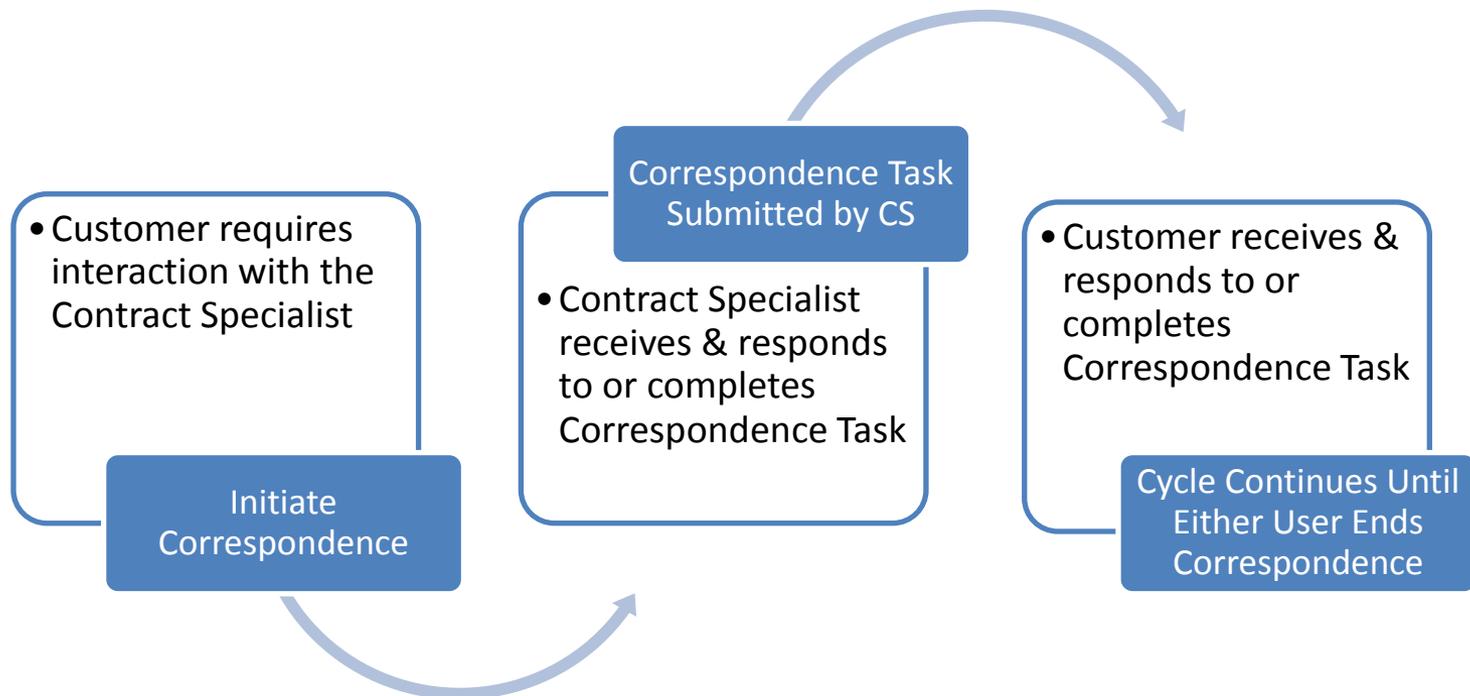
Lesson Objectives

- **Objective:**
 - **Upon completion of this lesson the customer will be able to:**
 - Create a Requirement.
 - Review the *Requirement Summary Dashboard*.
 - Review the *Requirement Related Actions*.





Requirement Process: Post-Contracting Acceptance



* Reverse process if the *Correspondence Related Action* is initiated by the Contract Specialist.



New Requirement

- Initiate *New Requirement* into IDEAS:
 - From the *Landing Page*, under “*Actions*”, click “*Enter New Requirement*”.

My Requirements

Actions

Enter New Requirement

My Tasks

Filters ▶

Export

Refresh

Task	Requirement #	Received	Assigned To
Respond to Correspondence from Indah Gass_CS for Requirement A000041		9/28/2015 9:13 AM EDT	Indah Customer
Respond to Correspondence from Indah Customer for Requirement A000476		6/4/2015 2:29 PM EDT	Indah Customer
Respond to Correspondence from Indah Gass_CS for Requirement A000333		4/8/2015 3:03 PM EDT	Indah Customer
Update Correspondence for Requirement A000227		4/1/2015 1:10 PM EDT	Indah_CS; Indah Customer

My Requirements

Filters ▶

Export

Clear Filters

Refresh

Procurement Object	Identifier	Requirement Number	Status	Contract Specialist	Contracting Officer	Contracting Office	↓	Created Date
Requirement	A000065	233333444	Validated					10/1/2015 6:07 PM EDT
Requirement	A000063		Assigned/Accepted	Indah Gass_CS	Indah Gass_KO	PL511		10/1/2015 1:39 PM EDT
Requirement	A000060	12344556	Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511		10/1/2015 11:09 AM EDT
Requirement	A000059		Assigned/Accepted	Indah Gass_CS	Indah Gass_KO	PL511		9/30/2015 4:04 PM EDT
Requirement	A000054	900001	Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511		9/29/2015 9:06 AM EDT
Requirement	A000050	1234567	Assigned/Accepted	Chris BurgoyneCS	Chris BurgoyneKO	PL511		9/28/2015 1:12 PM EDT



Enter Requirement Information

Fill out form.

A red asterisk (*) denotes required fields.

It is important to fill in *all known information*.

Click “**Continue**” to go to the next portion of the form.

Group Hierachy Selection

Agency / Organization / Sub Organization

Group Type *

Organization

Please select an Group Type

Agency

-- Select One --

Please select an Agency

Organization *

-- Select One --

Please select an Organization

Continue

Cancel



Enter Requirement Information (cont.)

Fill out form.

A red asterisk (*) denotes required fields.

It is important to fill in all known information.

Click **“Next”** to continue.

Requirement Information

Basic Information

Customer Requirement #

Requirement Information & Key Dates

Title *

Required Delivery Date *

Priority *

All dates must be entered in "MM/DD/YYYY" format

POP Begin *

Category *

All dates must be entered in "MM/DD/YYYY" format

POP End *

All dates must be entered in "MM/DD/YYYY" format

Description *

Summary Level of goods/services and if applicable contract and T.O. #

Next

Cancel



Enter Requirement Information (cont.)

Fill out form.

A red asterisk (*) denotes required fields.

It is important to fill in all known information.

Click **“Next”** to continue.

Requirement Information

Funding Information

Estimated Total Lifecycle Value *

Estimated Base Period Amount *

Estimated Current FY Amount *

Award by Sept. 30th? *

Yes
 No

Requestor Information

Organization *

Country *

DoDAAC *

Military/Federal Overseas

POC Name *

Chris BurgoyneCust

Address 1 *

POC Email *

BurgoyneCust@email.com

Address 2

POC Phone Number (+ext.) *

City *

State / Province *

United States Zip Code *

Zip Code Extension

Back

Next

Cancel



Enter Requirement Information (cont.)

Fill out form.

A red asterisk (*) denotes required fields.

It is important to fill in *all known information*.

Click “**Next**” to continue.

Subject to Technical Expert Status Accreditation (TESA)? *

Yes- If yes, start to coordinate the TESA process and plan this lead time (approximately 8-18 weeks) into your acquisition planning.

No

[Show Guidelines](#)

Requires Property Accountability? (DISA customer requirements only) *

Yes- If yes, ensure the Electronic Product List (EPL) is made a part of the SOW/PWS (see Para 13f/14f of the SOW/PWS templates) or the Equipment/Material List (see “NOTE” in the excel spreadsheet).

No

[Show Guidelines](#)

Incumbent Contractors

Contractor	Contract Number	Task/Delivery Order Number
No items available		

[+ Add Incumbent Contractor](#)

[Show Guidelines](#)

Recurring Requirement? *

Yes

No

[Show Guidelines](#)

Involves Public Disclosure of Potentially Harmful Information? *

Yes

No

[Show Guidelines](#)

Nomination to appoint a COR (Primary & Alternate) completed in the CORT Tool?

Yes

No

[Show Guidelines](#)

Involves Personally Identifiable Information (PII)? *

Yes

No

[Show Guidelines](#)

Recommended Product Service Code (PSC) *

Funding will be provided via DD Form 448 (MIPR)

[Show Guidelines](#)



Enter Requirement Information (cont.)

Fill out form.

A red asterisk (*) denotes required fields.

It is important to fill in all known information.

Click **“Save”** to finish then form.

Requirement Information

Primary Acceptor Information

Copy From Requestor

Organization * <input type="text"/>	Country * United States USA ▼
DoDAAC * <input type="text"/>	Military/Federal Overseas <input type="checkbox"/>
POC Name * <input type="text"/>	Address 1 * <input type="text"/>
POC Email * <input type="text"/>	Address 2 <input type="text"/>
POC Phone Number (+text) * <input type="text"/>	City * <input type="text"/>
	State / Province * -- Select One -- ▼
	United States Zip Code * <input type="text"/>
	Zip Code Extension <input type="text"/>
Alternate Acceptor Information	
Organization <input type="text"/>	Country United States USA ▼
DoDAAC <input type="text"/>	Military/Federal Overseas <input type="checkbox"/>
POC Name <input type="text"/>	Address 1 <input type="text"/>
POC Email <input type="text"/>	Address 2 <input type="text"/>
POC Phone Number (+text) <input type="text"/>	City <input type="text"/>
	State / Province -- Select One -- ▼
	United States Zip Code <input type="text"/>
	Zip Code Extension <input type="text"/>

Back

Save

Cancel



Requirement Confirmation and Navigation Links

- **Navigational Links:**
 - **Your New Requirement: XXXX**
 - This link takes you to the *Record Dashboard*.
 - **All Requirement Records**
 - This link takes you to *all* of your *Requirement Package Records*.

Click “**Your New Requirement: XXXX**” to go to the requirement’s *Summary Dashboard*.

A000013 Has Been Created

You have successfully created your new requirement A000013 for kc delete soon. Use the navigation links below.

Related Actions are temporarily unavailable while creation processes complete. In the case that your Related Actions are not available, refresh the page.

Navigation Links

[Your New Requirement: A000013](#)

[All Requirement Records](#)



Review Summary Dashboard

This is the *Summary Dashboard* where you can review the Requirement Package information for accuracy.

If updates are required, you can easily access the *Related Actions* menu or the three most-used *Related Actions* from the upper right-hand corner of the dashboard.



Summary -
News
Related Actions
Additional Information
Funding Information
Enclosure Documents
History

Records / Requirements

A000013 - KC Demo Reqt42

Follow

Update Requirement

Submit Requirement to ...

Delete Draft Requirement

Basic Information

Status	Validated	Customer Requirement Number	No value was entered for the Customer Requirement Number. To enter a value, use the Related Action to update this requirement.
Contracting Office	-	PALT Contract Vehicle	
CS Assigned		Date Received	
KO Assigned		Required Delivery Date	
Priority	N/A	POP Begin	Sep 21, 2015
Category	IT Software	POP End	Sep 25, 2015
Description	A demo requirement		

Funding Information

Total Funds Available for Obligation	\$0.00	Estimated Base Period Amount	\$10,000.00
Estimated Total Lifecycle Value	\$50,000.00	Award by Sept 30th?	No
Estimated Current FY Amount	\$10,000.00		

Requestor Information

Organization	My Org	Email	BurgoyneCust@email.com
DoDAAC	333333	Phone	2
POC Name	Chris BurgoyneCust	Address	4 Lexington, KY 33333

Acceptor Information

Organization	da	Email	BurgoyneCust@email.com
DoDAAC	333333	Phone	2
POC Name	Chris BurgoyneCust	Address	4 3 main st, KY 33333

Alternate Acceptor Information

Organization		Email	
DoDAAC		Phone	
POC Name		Address	

Procurement Related Records



Related Actions

- **Update Requirement:** Update the requirement information.
- **Manage Funding:** Add/Remove Funding Information.
- **Manage Enclosure Documents:** Upload/Add/Delete/Edit Enclosure Documents.
- **Submit Requirement to Contracting:** Submits to Contracting for review/approval.
- **Download Requirement Package Templates:** View ordering guidance and download requirement package templates.
- **Delete Requirement:** Removes requirement from system.



Summary

News

Related Actions ▾

Funding Information

Enclosure Documents

History

Records / Requirements

A000234 - MH-009



Update Requirement



Manage Funding



Manage Enclosure Documents



Submit Requirement to Contracting



Download Requirement Package Templates



Delete Requirement



Summary

- **In this lesson you learned how to:**
 - **Create a Requirement.**
 - **Review the Requirement Summary Dashboard.**
 - **Review the Requirement's Related Actions.**



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