



Manage Enclosure Documents for Requirements Package



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Lesson Objectives

- **Objective:**
 - **Upon completion of this lesson the customer will be able to:**
 - Download enclosure templates and upload enclosure documents to IDEAS.
 - Review enclosure documents through *Enclosure Documents Dashboard*.



Locate Record

The Requirement Package can be accessed from “My Requirements” on the Landing Page.

News Tasks (14) Records Reports Actions Indah Customer

My Requirements

Actions

Enter New Requirement

My Tasks

Filters >

Export

Task	Requirement #	Received	Assigned To
Respond to Correspondence from Chris BurgoyneCB for Requirement A000689		9/1/2015 11:13 AM EDT	Indah Customer
Respond to Correspondence from Indah Customer for Requirement A000476		6/4/2015 2:29 PM EDT	Indah Customer
Update Correspondence for Requirement A000442		9/28/2015 2:13 PM EDT	Indah Customer
Respond to Correspondence from Indah CBO Only for Requirement A000437		9/17/2015 10:51 PM EDT	Indah Customer
Respond to Correspondence from Indah Gess_CB for Requirement A000419		9/15/2015 10:56 AM EDT	Indah Customer
Respond to Correspondence from Indah Gess_CB for Requirement A000361		4/13/2015 12:43 PM EDT	Indah Customer
Respond to Correspondence from Indah Gess_CB for Requirement A000361		4/9/2015 10:34 PM EDT	Indah Customer
Respond to Correspondence from Indah Gess_CB 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_CB; Indah Customer
Review Correspondence from Indah Gess_CB for Requirement A000227		3/13/2015 3:43 PM EDT	Indah Customer
Review Correspondence from Indah Customer for Requirement A000527		1/19/2015 10:22 AM EST	Indah Customer
Review correspondence from Indah Gess_CB for Requirement A000058		9/24/2014 4:10 PM EDT	Indah Customer
Review correspondence from Indah Gess_CB for Requirement A000058		9/24/2014 12:01 PM EDT	Indah Customer
Review correspondence from Indah Gess_CB for Requirement A000058		9/24/2014 12:00 PM EDT	Indah Customer

My Requirements

Filters >

Export

Procurement Object	Identifier	Requirement Number	Status	Contract Specialist	Contracting Officer	Contracting Office	Created Date
Requirement	A000020		Validated				9/22/2015 8:53 AM EDT
Requirement	A000018		Assigned/Accepted	Chris BurgoyneCB	Chris BurgoyneKD	PLS11	9/21/2015 5:00 PM EDT
Requirement	A000017		Assigned/Accepted	Chris BurgoyneCB	Chris BurgoyneKD	PLS11	9/21/2015 4:55 PM EDT
Requirement	A000016		Assigned/Accepted	Chris BurgoyneCB	Chris BurgoyneKD	PLS11	9/21/2015 4:41 PM EDT
Requirement	A000015		Validated				9/21/2015 3:46 PM EDT
Requirement	A000014		Validated				9/21/2015 3:32 PM EDT
Requirement	A000012		Validated				9/21/2015 2:56 PM EDT
Requirement	A000011		Validated				9/21/2015 2:10 PM EDT
Requirement	A000008		Validated				9/21/2015 12:24 PM EDT
Requirement	A000007		Assigned/Accepted	Indah Gess_CB	Indah Gess_KD	PLS11	9/21/2015 9:49 AM EDT

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Related Actions: Manage Enclosure Documents

From *Related Actions*, click “**Manage Enclosure Documents**” to upload Enclosure Documents.



Summary

News

Related Actions ▶

Funding Information

Enclosure Documents

History

Records / Requirements

A000234 - MH-Training A



Update Requirement



Manage Funding



Manage Enclosure Documents



Submit Requirement to Contracting



Download Requirement Package Templates



Delete Requirement



Manage Enclosure Documents Form

- Click “**Add**” to upload new *Enclosure Documents*.
- Click “**New Version**” to indicate you want to upload a new version of a document.
- Click “**Delete**” to remove a document that is no longer needed.
- Click “**Close**” when done with this form.

Manage Enclosure Documents for A000320

<input type="checkbox"/>	Document	Enclosure Type	Size	Version	Modified By	↓	Modified On
No items available							



Manage Enclosure Documents Form (cont.)

- Click an **“Enclosure Type”** from the dropdown menu.
- Click **“Browse”** (under *“Upload Document”*) to navigate to a document on your computer to be uploaded to the IDEAS system. Once the document is uploaded, IDEAS presents a dynamic text box that gives you the option of renaming the document. (See next slide.)
- Click **“Save”** to save the document to IDEAS or click **“Cancel”** to cancel the uploading of the document.

Manage Enclosure Documents for A000320

<input type="checkbox"/>	Document	Enclosure Type	Size	Version	Modified By	↓	Modified On
No items available							

Enclosure Type *

-- Select One --

Select the enclosure template that matches your uploaded document

Upload Document *

No file selected.



Manage Enclosure Documents Form (cont.)

- Now that you have uploaded an Enclosure Document, you have the option of renaming it.
- Under “*New File Name*”, type a **new name** to save the file using a different name.
- Click “**Save**” to save the document to IDEAS or click “**Cancel**” to stop its being uploaded.

Manage Enclosure Documents for A000320

	Document	Enclosure Type	Size	Version	Modified By	↓	Modified On
No items available							

Enclosure Type*

Encl 3 Statement of Work (SOW)

Select the enclosure template that matches your uploaded document

Upload Document*

test.txt (3.7 KB) [Remove](#)

New File Name

SOW Document

If you would like to save the file under a different name, please type that name here.



Manage Enclosure Documents Form (cont.)

- To continue to upload Enclosure Documents, click “**Add**” and follow the same process.
- Click “**Close**” to exit once you have completed uploading all Enclosure Documents.

Manage Enclosure Documents for A000320

<input type="checkbox"/>	Document	Enclosure Type	Size	Version	Modified By	↓	Modified On
<input type="checkbox"/>	SOW Document	Encl 3 Statement of Work (SOW)	3.7 KB	1	Midge CI		12/2/2014 1:55 PM GMT+00:00



Enclosure Documents Dashboard Link

- Under “*Related Actions*”, click the “**Enclosure Documents**” Dashboard link to view all uploaded Enclosure Documents.



Summary

News

Related Actions ▶

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A000320 - MH-Training



Update Requirement



Manage Funding



Manage Enclosure Documents



Submit Requirement to Contracting



Download Requirement Package Templates



Delete Requirement



Enclosure Documents Dashboard

- The “*Enclosure Documents*” Dashboard displays the names of the uploaded Enclosure Documents with a link to open and view each one.
- Under “*Approved?*” IDEAS can indicate if the Contract Specialist has approved the document.

[Records / Requirements](#)

A000320 - MH-Training

Enclosure Documents

Document	Enclosure Type	Size	Version	Modified By	↓	Modified On	Approved?
SOW Document	Encl 3 Statement of Work (SOW)	3.7 KB	1	Midge CI		12/2/2014 1:55 PM GMT+00:00	<input type="radio"/>



Summary

- **In this lesson you learned how to:**
 - **Upload Enclosure Documents.**
 - **Review the Enclosure Documents Dashboard.**



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