



Filter Tasks and Requirements



Table of Contents

- **Objectives**
- **IDEAS Main Landing Page**
- **Task Filters**
- **Requirements Filters**
- **Summary**



Lesson Objectives

- **Objective:**
 - **Upon completion of this lesson the customer will be able to:**
 - Use the *Tasks* filter.
 - Use the *Requirement* filter.



IDEAS Main Landing Page

Actions: One can enter a new requirement.

My Tasks: Locate an assigned task and review/complete.

My Requirements: Locate a Requirement to select and either review or take further action.

News Tasks (7) Records Reports Actions

Chris BurgoyneCust

My Requirements

Actions

My Tasks

Filters >

Export

| Task | Requirement # | Received | Assigned To |
|---|---------------|------------------------|--------------------|
| Respond to Correspondence from Chris BurgoyneCS for Requirement A000034 | | 9/23/2015 10:55 AM EDT | Chris BurgoyneCust |
| Update Correspondence for Requirement A000034 | | 9/23/2015 10:54 AM EDT | Chris BurgoyneCust |
| Customer input for A000035 | | 9/23/2015 10:47 AM EDT | Chris BurgoyneCust |
| Customer input for A000035 | | 9/23/2015 10:47 AM EDT | Chris BurgoyneCust |
| Customer input for A000031 | | 9/23/2015 10:46 AM EDT | Chris BurgoyneCust |
| Customer input for A000035 | | 9/23/2015 10:42 AM EDT | Chris BurgoyneCust |
| Manage Enclosure Documents for Requirement A000035 | | 9/23/2015 10:42 AM EDT | Chris BurgoyneCust |
| Manage Enclosure Documents for Requirement A000035 | | 9/23/2015 10:42 AM EDT | Chris BurgoyneCust |
| Enter Requirement Package | | 9/23/2015 10:38 AM EDT | Chris BurgoyneCust |
| Select Organization | | 9/23/2015 10:39 AM EDT | Chris BurgoyneCust |
| Customer input for A000034 | | 9/23/2015 10:29 AM EDT | Chris BurgoyneCust |
| Manage Enclosure Documents for Requirement A000034 | | 9/23/2015 10:38 AM EDT | Chris BurgoyneCust |
| Manage Enclosure Documents for Requirement A000034 | | 9/23/2015 10:38 AM EDT | Chris BurgoyneCust |
| Enter Requirement Package | | 9/23/2015 10:35 AM EDT | Chris BurgoyneCust |
| Select Organization | | 9/23/2015 10:35 AM EDT | Chris BurgoyneCust |

My Requirements

Filters >

Export

| Procurement Object | Identifier | Requirement Number | Status | Contract Specialist | Contracting Officer | Contracting Office | Created Date |
|--------------------|------------|----------------------------------|-------------------|---------------------|---------------------|--------------------|------------------------|
| Requirement | A000035 | 987TYV | Submitted | | | | 9/23/2015 10:42 AM EDT |
| Requirement | A000034 | 55R3V | Assigned/Accepted | Chris BurgoyneCS | Chris BurgoyneKO | PL511 | 9/23/2015 10:38 AM EDT |
| Requirement | A000033 | Test FPO5-AG for Type A Contract | Validated | | | PL71 | 9/23/2015 10:36 AM EDT |
| Requirement | A000032 | 55REG6 | Assigned/Accepted | Chris BurgoyneCS | Chris BurgoyneKO | PL511 | 9/23/2015 10:33 AM EDT |



Task Filters

Filters include:

- **Task Name:** Search by task name or a portion of the task name.
- **Assigned To:** Search tasks by group or user
- **Requirement Number:** Search by the requirement number.
- **Status:** Filter between All, Active, or Completed Tasks.
- **Received:** Choose between two dates, or before, on, or after a certain date.

My Tasks

Filters ▾

| | |
|----------------------|--|
| Task Name | Status |
| <input type="text"/> | Active <input type="button" value="v"/> |
| Assigned To | Received |
| <input type="text"/> | Between <input type="button" value="v"/> |
| Requirement Number | M/d/yyyy |
| <input type="text"/> | M/d/yyyy |

Export

| 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 |



Requirements Filters

Requirement Filters include:

- **Identifier:** Search by the system-generated identifier associated with each Requirement.
- **Requirement Number:** Search by the user-entered Requirement Number.
- **Status:** Choose between Requirements at different steps in the submission process: *Validated*, *Submitted*, and *Assigned/Accepted*.
- **Contract Specialist and Contracting Officer:** Filter by the assigned Contract Specialist or Contracting Officer.
- **Office:** Filter by Contracting Office.

My Requirements

Filters ▾

Identifier

Contract Specialist

Requirement Number

Contracting Officer

Status

Office

Export

Clear Filters Refresh

| Procurement Object | Identifier | Requirement Number | Status | Contract Specialist | Contracting Officer | Contracting Office | ↓ | Created Date |
|--------------------|------------|--------------------|-------------------|---------------------|---------------------|--------------------|---|------------------------|
| Requirement | A000090 | | Assigned/Accepted | Chris BurgoyneCS | Chris BurgoyneKO | PL511 | | 10/12/2015 7:08 PM EDT |
| Requirement | A000082 | | Assigned/Accepted | Chris BurgoyneCS | Chris BurgoyneKO | PL511 | | 10/6/2015 10:43 PM EDT |



Summary

- In this lesson you learned how to:
 - Use *Filters* to locate *Tasks*.
 - Use *Filters* to locate *Requirements*.



DEFENSE INFORMATION SYSTEMS AGENCY
The IT Combat Support Agency

UNITED IN SERVICE TO OUR NATION