

Electronic Subcontracting Reporting System (ESRS) Agency Coordinator Guide 1.2

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1. Log-In to ESRS

1.1 Existing Users

- I. Point your browser to <https://www.esrs.gov/government/>
- II. Login to ESRS by typing your e-mail address and password.
- III. Click "Go"

Government Users Login Screen

The screenshot shows the login interface for government users. It features a navigation bar with the eSRS logo and system name. Below this, there's a 'Welcome Government Users' section with three tabs: 'eSRS Sign-In', 'Register', and 'Forgot my password'. The 'eSRS Sign-In' tab is active, showing two text input fields for 'Email Address:' and 'Password:'. There is also a checkbox labeled 'Keep me logged in on this computer' and a link that says 'Not a government user? Click here.'. At the bottom of the form are two buttons: 'Go' and 'Reset'. A light blue arrow points to the 'Go' button, with the Roman numeral 'III.' written inside it, indicating the step described in the text above.

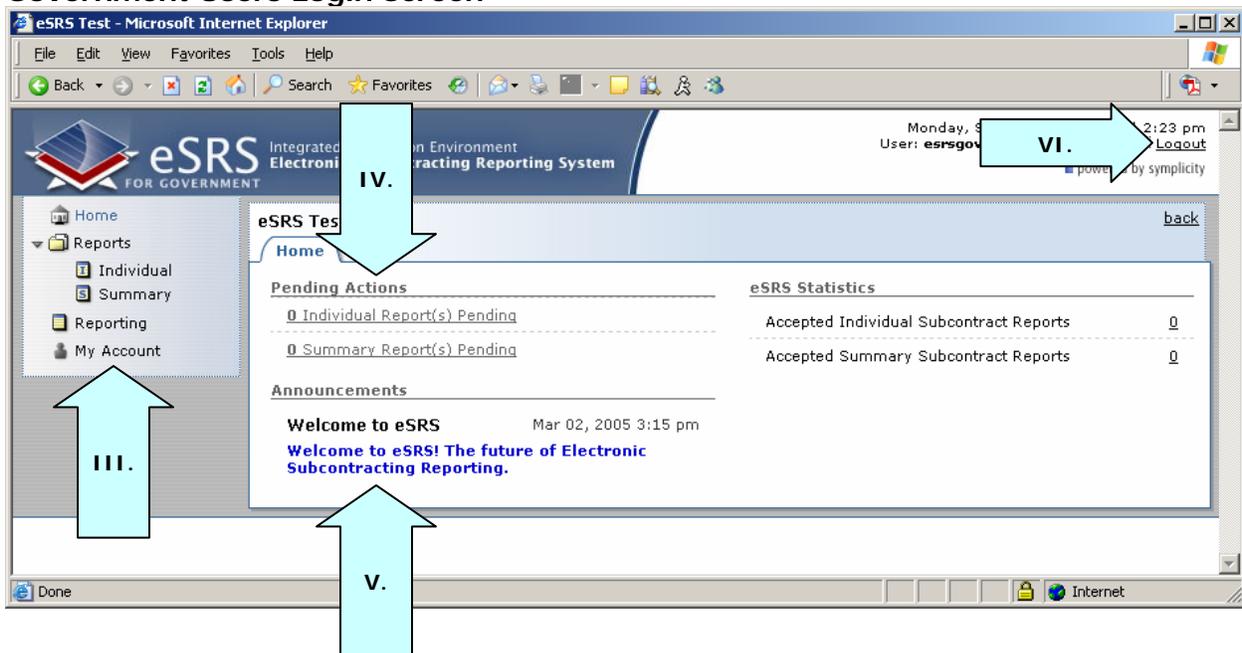
1.2 New Users

- I. Point your browser to <https://www.esrs.gov/government/>
- II. Click on the "Register" tab.
- III. Select your Agency.
- IV. Complete the forms, clicking continue after you have completed each section.
- V. At the last step, please review the information, and when ready click "Submit Registration"
- VI. You will receive an e-mail after submitting. Please follow the directions in the e-mail that you receive.
- VII. After confirming your account, you will see an "Account Confirmation Successful" message. You must now wait for approval.
- VIII. Once you are approved, you will be sent another e-mail.
- IX. You may now login to the system by following "Section 1.1, p. 3" of this manual.

2. Home

- I. Login to ESRS.
- II. You will be directed to your ESRS homepage. (Depending upon your account, your homepage and navigation menu may appear differently)
- III. On the left hand side of the screen, the navigation menu is shown. This menu is available throughout all pages on the system.
- IV. "Pending Actions" will display all items in the system that your account has access to with the status "pending".
- V. Announcements are created by administrators. For more information on how to create announcements, please review "Section 3" of this manual.
- VI. Finally, when you are done using the system, please click on the "Logout" link on the top of every page.

Government Users Login Screen

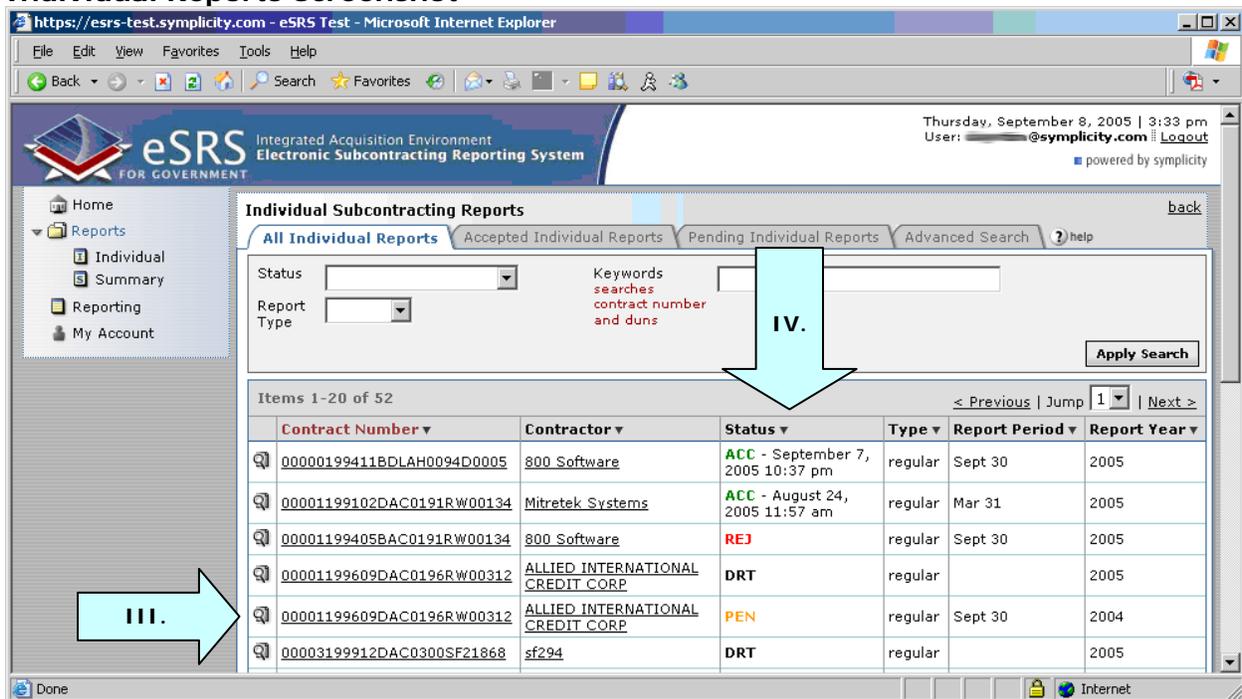


3. Reports

3.1 Individual

- I. Click on "Reports" and then "Individual" on the left hand navigation menu.
- II. You will see a screen similar to the Individual Reports Screenshot below.
- III. Click on the  View Icon beside any report to see more information regarding the filed report.
- IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▼) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
- V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
- VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the "Next >" or "< Previous" links to traverse through the list.

Individual Reports Screenshot



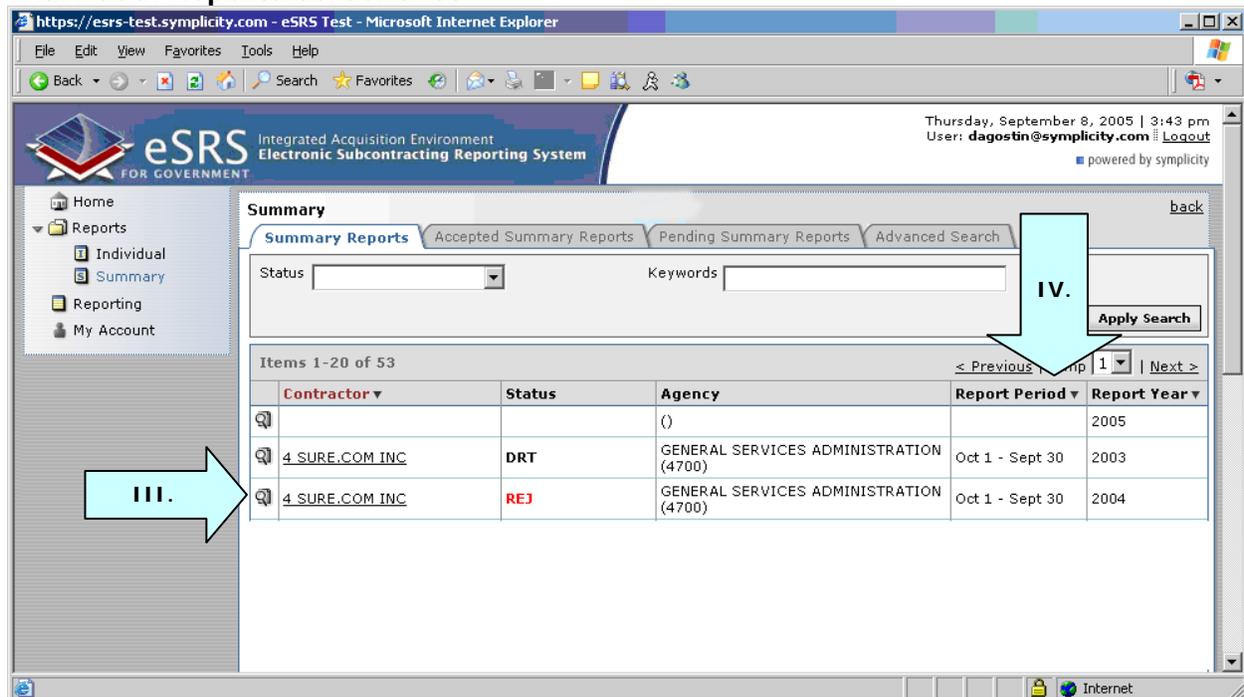
The screenshot displays the 'Individual Subcontracting Reports' page. The left navigation menu includes 'Home', 'Reports', 'Individual', 'Summary', 'Reporting', and 'My Account'. The main content area has tabs for 'All Individual Reports', 'Accepted Individual Reports', 'Pending Individual Reports', and 'Advanced Search'. Search filters include 'Status', 'Report Type', and 'Keywords' (with sub-options for 'searches', 'contract number', and 'duns'). A table lists 20 items, with columns for 'Contract Number', 'Contractor', 'Status', 'Type', 'Report Period', and 'Report Year'. A red arrow labeled 'III.' points to the 'View' icon in the first row. A blue arrow labeled 'IV.' points to the 'Contract Number' column header.

Contract Number ▼	Contractor ▼	Status ▼	Type ▼	Report Period ▼	Report Year ▼
 00000199411BDLAH0094D0005	800 Software	ACC - September 7, 2005 10:37 pm	regular	Sept 30	2005
 00001199102DAC0191RW00134	Mitretek Systems	ACC - August 24, 2005 11:57 am	regular	Mar 31	2005
 00001199405BAC0191RW00134	800 Software	REJ	regular	Sept 30	2005
 00001199609DAC0196RW00312	ALLIED INTERNATIONAL CREDIT CORP	DRT	regular		2005
 00001199609DAC0196RW00312	ALLIED INTERNATIONAL CREDIT CORP	PEN	regular	Sept 30	2004
 00003199912DAC0300SF21868	sf294	DRT	regular		2005

3.2 Summary

- I. Click on "Reports" and then "Summary" on the left hand navigation menu.
- II. You will see a screen similar to the Summary Reports Screenshot below.
- III. Click on the  View Icon beside any report to see more information regarding the filed report.
- IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▼) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
- V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
- VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the "Next >" or "< Previous" links to traverse through the list.

Individual Reports Screenshot



Thursday, September 8, 2005 | 3:43 pm
User: [dagostin@simplicity.com](#) | [Logout](#)
powered by simplicity

Summary [back](#)

Summary Reports Accepted Summary Reports Pending Summary Reports Advanced Search

Status Keywords

Items 1-20 of 53 < Previous Page 1 | Next >

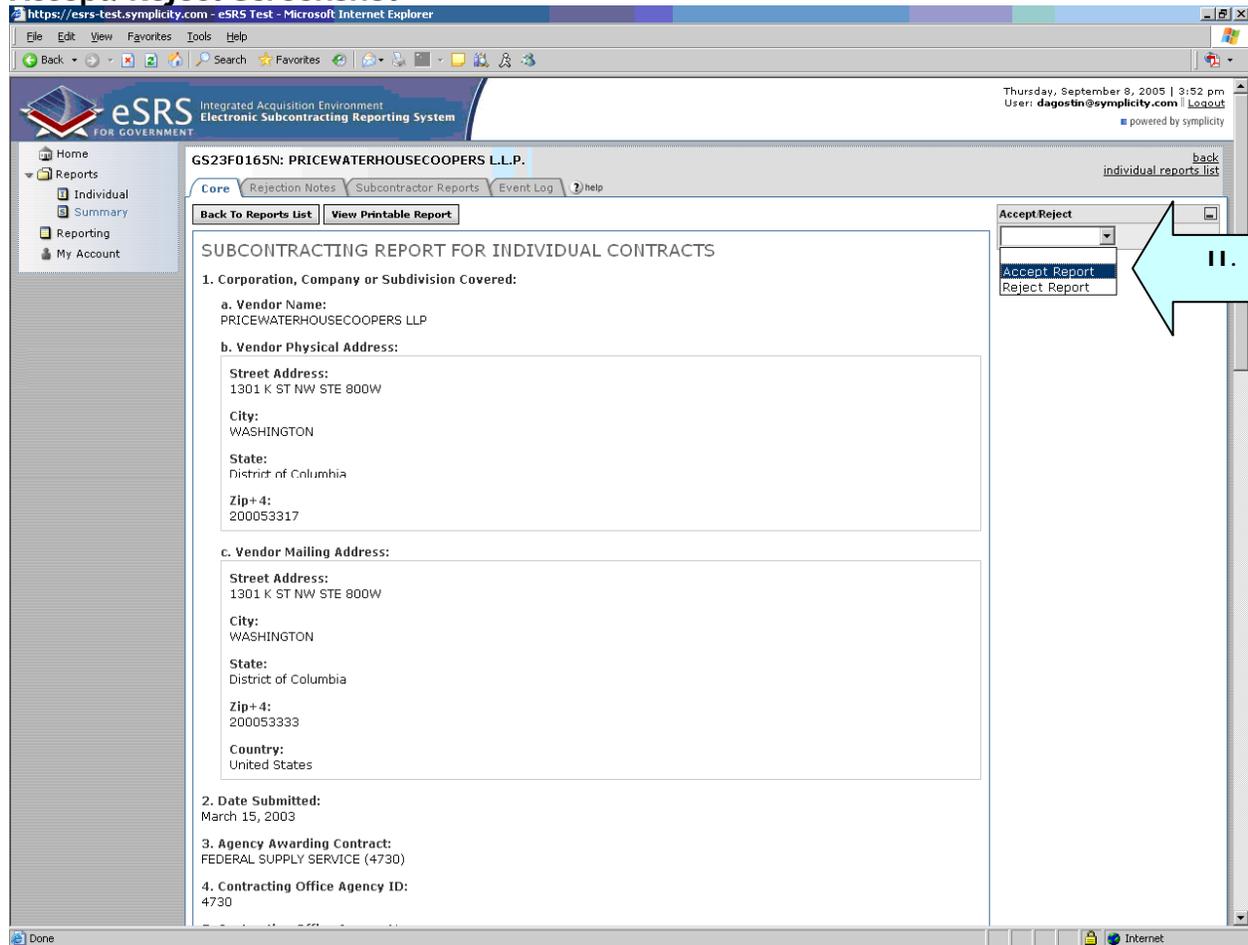
Contractor ▼	Status	Agency	Report Period ▼	Report Year ▼
		()		2005
 4 SURE.COM INC	DRT	GENERAL SERVICES ADMINISTRATION (4700)	Oct 1 - Sept 30	2003
 4 SURE.COM INC	REJ	GENERAL SERVICES ADMINISTRATION (4700)	Oct 1 - Sept 30	2004

3.3 Accept / Reject

The processes to accept or reject individual and summary reports are the same. To accept or reject, simply go to the section (Individual or Summary) that the report is filed. Click on the "Pending" tab near the top of the screen, and find the report that you would like to accept or reject.

- I. Click on the  View Icon beside the report.
- II. Select Accept Report or Reject Report from the drop down box (See Accept/Reject Screenshot below).
- III. If you accepted the report, you may return to the report list by clicking on the "Back to Reports List" button.
- IV. If you clicked "Reject Report" you will be redirected to a page with a form. Please fill this form out with information why the report was rejected. After completing the form, click "Submit" to finalize the rejection.

Accept/Reject Screenshot

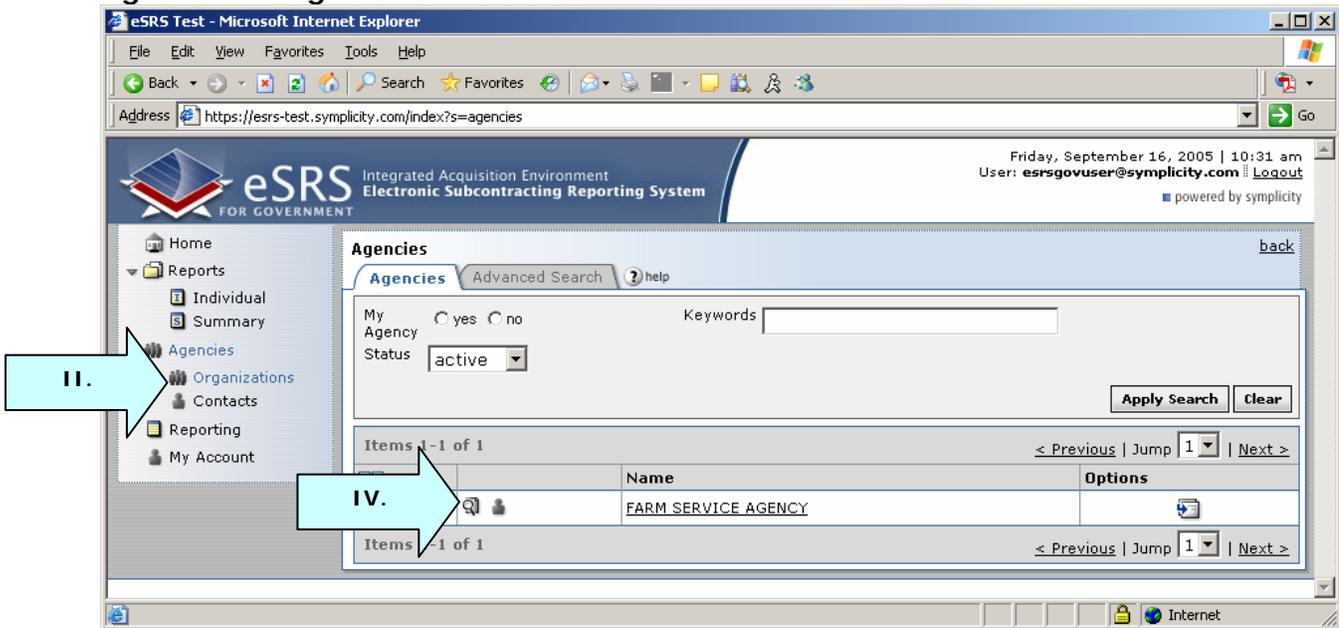


4. Agencies (Organizations)

4.1 Review / View Existing

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" on the left hand menu.
- III. You will see a screen similar to the "Agencies / Organizations Screenshot" below.
- IV. Click on the  View Icon beside any contractor to see more information pertaining to that specific contractor.
- V. Notice that any child organization will appear below the parent organization and will also have a  to the left of the name.

Agencies / Organizations Screenshot



4.2 Contacts

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" under Agencies.
- III. Click on the  Contacts button next to the agency.
- IV. The Contacts for this agency will appear.
- V. You can set a contact as the primary contact by clicking on the "Set Primary" button.
- VI. You may also edit a contact by clicking on the Edit Icon  beside the contact you wish to edit.
- VII. Finally, to send an e-mail to the contacts, put a checkmark beside the contacts you wish to e-mail. Use the "Batch Options" drop down to send an e-mail.
- VIII. For more information, please read Section 7, Contacts.

4.3 Add New Child Agency

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" under Agencies.
- III. Click on the  Add New Child button next to the parent agency.
- IV. You should now see a screen similar to the "Add Child Agency Screenshot" below.
- V. Populate the fields.
- VI. Click "Submit" when you are finished.

Add Child Agency Screenshot

https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer

Friday, September 16, 2005 | 10:33 am
User: dagostn@simplicity.com | Logout
powered by simplicity

[New Agency] [back](#) [agencies list](#)

Submit Save Cancel Cancel Edits Delete

Agency Information * indicates a required field

Parent Agency: .../AGRICULTURAL RESEARCH SERVICE (12H2)

Name*:

Shortname:

Code*:

Agency Address:

Street Address:

City:

State:

Zip+4:

Country:

Status: active

Submit Save Cancel Cancel Edits Delete

5. Reporting

5.1 Build New Reports

- I. Create New Report by clicking on REPORTING on the left navigation menu.
- II. Click on Add New

Add New Report

The screenshot shows the eSRS Reporting interface. The left navigation menu has a 'Reporting' link highlighted with a blue arrow labeled 'I.'. The main content area shows a 'Reporting' section with a 'Saved Reports' tab. Below this is a search area with a 'Class' dropdown and a 'Keywords' input field. An 'Apply Search' button is present. Below the search area is a table of reports. The table has columns for 'Options', 'Class', 'Label', 'Description', 'Agency Reporting', 'Last Modified', and 'Last Run'. One report is listed: 'Individual Subcontract Report' with label '[f294] David D' and description 'ADMINISTRATIVE OFFICE OF THE U.S. COURTS (1027)'. At the bottom of the table is an 'Add New' button, which is highlighted with a blue arrow labeled 'II.'.

Options	Class	Label	Description	Agency Reporting	Last Modified	Last Run
	Individual Subcontract Report	[f294] David D		ADMINISTRATIVE OFFICE OF THE U.S. COURTS (1027)	Jul 13, 2005 10:31 am	Jul 13, 2005 10:31 am

- III. Select the basis for your report.
- IV. Click Continue
 - V. Before building the report, checkmark the Save As box and input a Name and Description for the Report.
 - VI. When updating an existing report, save the report under a different name by check-marking Copy to New Report.
- VII. Select the fields to be included in the report by check-marking specific fields.
- VIII. Narrow the focus of the report by clicking on a Filter link under a particular field.
- IX. Once fields and filters have been assigned, view the report by clicking Submit at the bottom of the page. **NOTE:** Save & return will save change to report builder, but will not run report in order to view it.

Build a New Report

Reporting

Previous Versions Settings help

Reports will pull from **accepted** Individual Subcontracting Reports from your agency and below. If you would like to filter specific agency/agencies, scroll down to the Contract Related class and choose from the agencies in the select list. If only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their lower-tiers. To limit the results to a specific reporting period, use the "Reporting Period From Inception Of Contract Thru:" filters.

V.

Save as: [f294] David D

Description:

Copy to new report

VI.

Step 2: Please select the fields and filters you wish to have included in your report.

▼ Base Class: Individual Subcontract Report Count

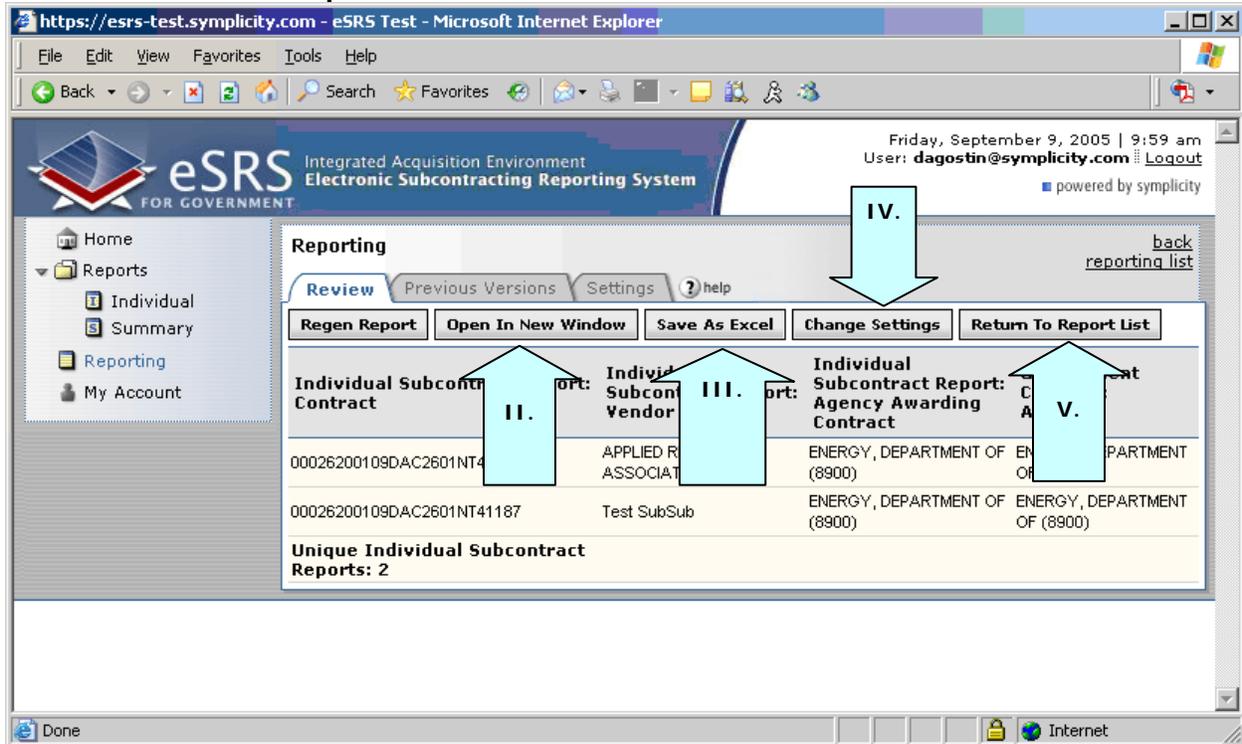
- Contract
- Report Submitted As filter ▾
- Vendor Name
- Vendor Physical Address
- Vendor Mailing Address
- Date Submitted
- Agency Awarding Contract
- Contracting Office Agency ID
- Contracting Office Agency Name
- Region Code
- Contracting Office ID
- Contracting Office Name
- Funding Agency ID
- Funding Agency Name
- Funding Office ID

VII., VIII.

5.2 View Generated Report

- I. Click on the  View Icon beside an existing report.
- II. Show the report in a separate browser by clicking on the Open in New Window button at the top.
- III. Transfer the report into an Excel Workbook by clicking the Save as Excel button.
- IV. Re-configure the report by clicking on Change Settings button at the top.
- V. Go back to the report list by clicking the Return to Report List button.

Review Generated Report



The screenshot shows the eSRS web application interface. The browser address bar displays "https://esrs-test.simplicity.com - eSRS Test - Microsoft Internet Explorer". The page header includes the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System". The user is logged in as "dagostin@simplicity.com" on Friday, September 9, 2005, at 9:59 am. The main content area is titled "Reporting" and features a "Review" tab. Below the tab are five buttons: "Regen Report", "Open In New Window", "Save As Excel", "Change Settings", and "Return To Report List". A table displays report data with columns for contract ID, vendor name, and report title. Red arrows labeled I through V point to specific elements: I points to the "View" icon in the original document, II points to the "Open In New Window" button, III points to the "Save As Excel" button, IV points to the "Change Settings" button, and V points to the "Return To Report List" button. The table contains two rows of data:

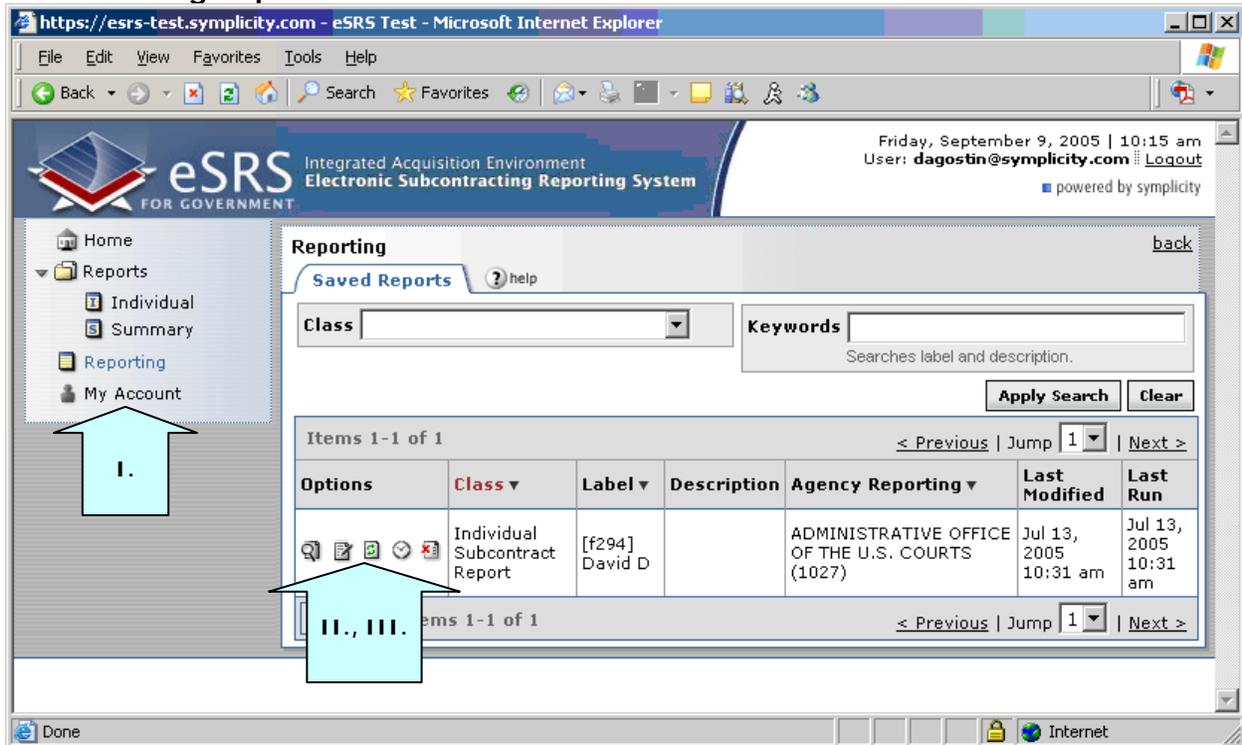
Individual Subcontract Contract	Individual Subcontract Vendor	Individual Subcontract Report: Agency Awarding Contract
00026200109DAC2601NT4	APPLIED R ASSOCIAT	ENERGY, DEPARTMENT OF (8900)
00026200109DAC2601NT41187	Test SubSub	ENERGY, DEPARTMENT OF (8900)

Below the table, it states "Unique Individual Subcontract Reports: 2".

5.3 View Existing Reports

- I. View Existing Report by clicking on REPORTING on the left navigation menu.
- II. View Saved Queries/Report on the list.
- III. View , Edit , Re-run , View Previous Results  by clicking on respective icons.

View Existing Reports



https://esrs-test.symplicity.com - eSRS Test - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print

Friday, September 9, 2005 | 10:15 am
User: dagostin@symplicity.com | [Logout](#)
powered by symplicity

eSRS Integrated Acquisition Environment
FOR GOVERNMENT Electronic Subcontracting Reporting System

Home
Reports
Individual
Summary
Reporting
My Account

Reporting [back](#)

Saved Reports [? help](#)

Class Keywords
Searches label and description.

Items 1-1 of 1 [< Previous](#) | Jump | [Next >](#)

Options	Class	Label	Description	Agency Reporting	Last Modified	Last Run
   	Individual Subcontract Report	[f294] David D		ADMINISTRATIVE OFFICE OF THE U.S. COURTS (1027)	Jul 13, 2005 10:31 am	Jul 13, 2005 10:31 am

Items 1-1 of 1 [< Previous](#) | Jump | [Next >](#)

Done Internet

6. My Account

6.1 General Information

My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

- I. Under Tools, Click on My Account.
- II. Change the fields that you wish to edit.
- III. Click on "Save".

6.1 Change Password

- I. Under Tools, Click on My Account.
- II. Click on the password tab.
- III. Enter your new password.
- IV. Click on "Save".

Password Change Screen

