symplicity

Electronic Subcontracting Reporting System (ESRS)

Contracting Official User Guide 1.9

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1. Log-In to ESRS

1.1 Existing Users

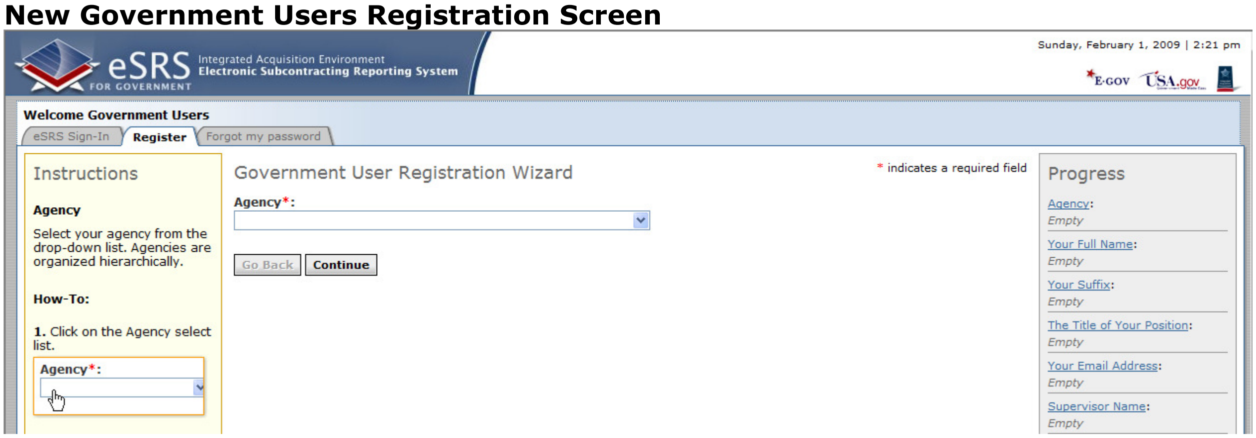
I. Point your browser to https://www.esrs.gov/government/
II. Login to ESRS by typing your e-mail address and password.
III. Click "Go"

Government Users Login Screen

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.

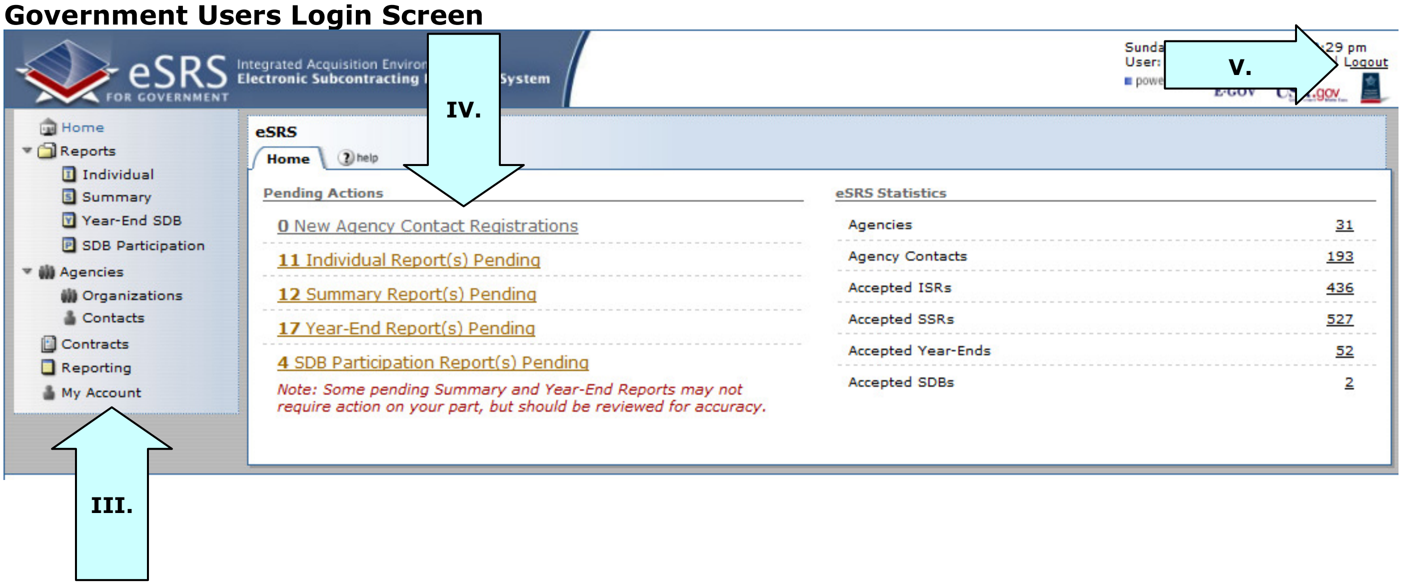
New Government Users Registration Screen



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. Finally, when you are done using the system, please click on the “Logout” link on the top of every page.

Government Users Login Screen

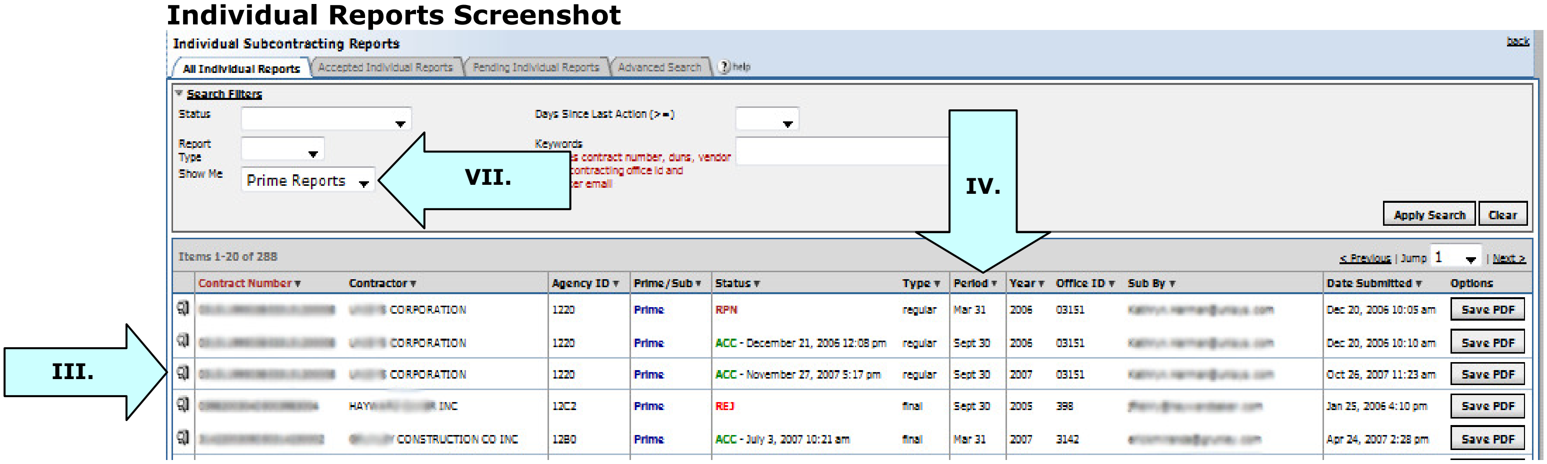


3. Reports

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.
VII. You may also select Prime or Sub reports.

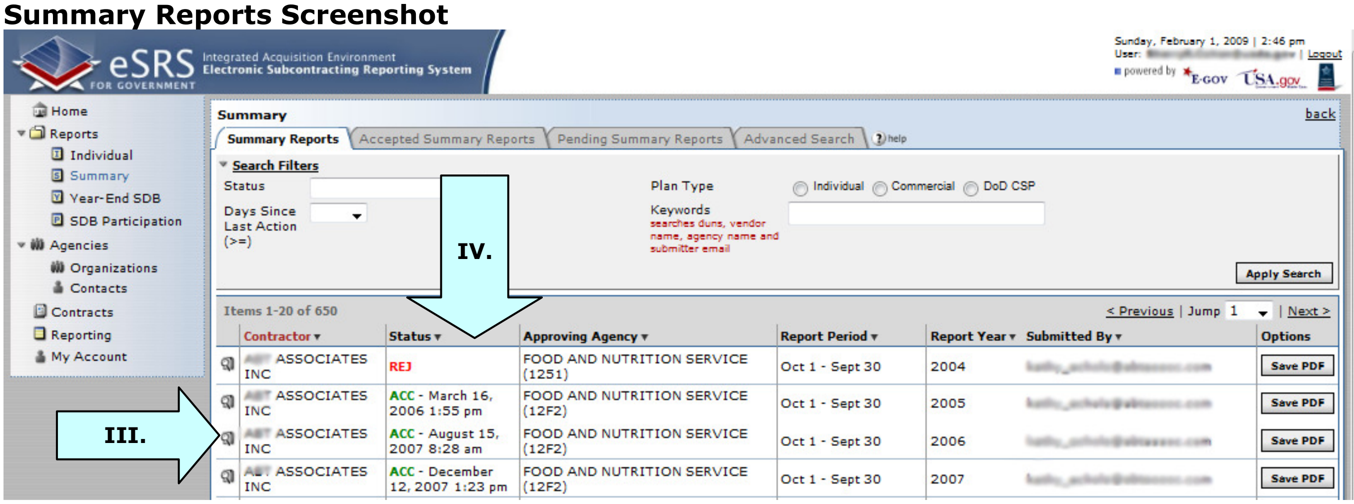
Individual Reports Screenshot



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.

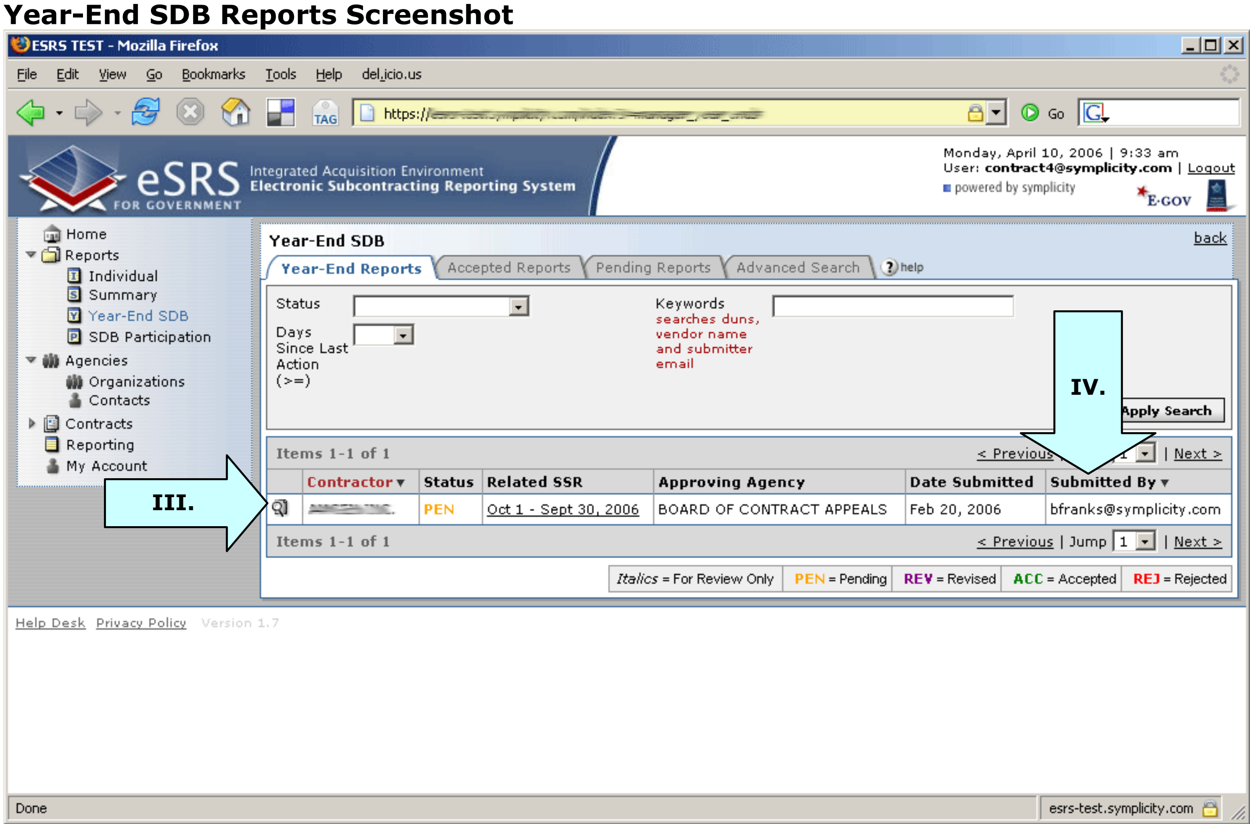
Summary Reports Screenshot



3.3 Year-End SDB

I. Click on "Reports" and then "Year-End SDB" on the left hand navigation menu.
II. You will see a screen similar to the Year-End SDB 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.

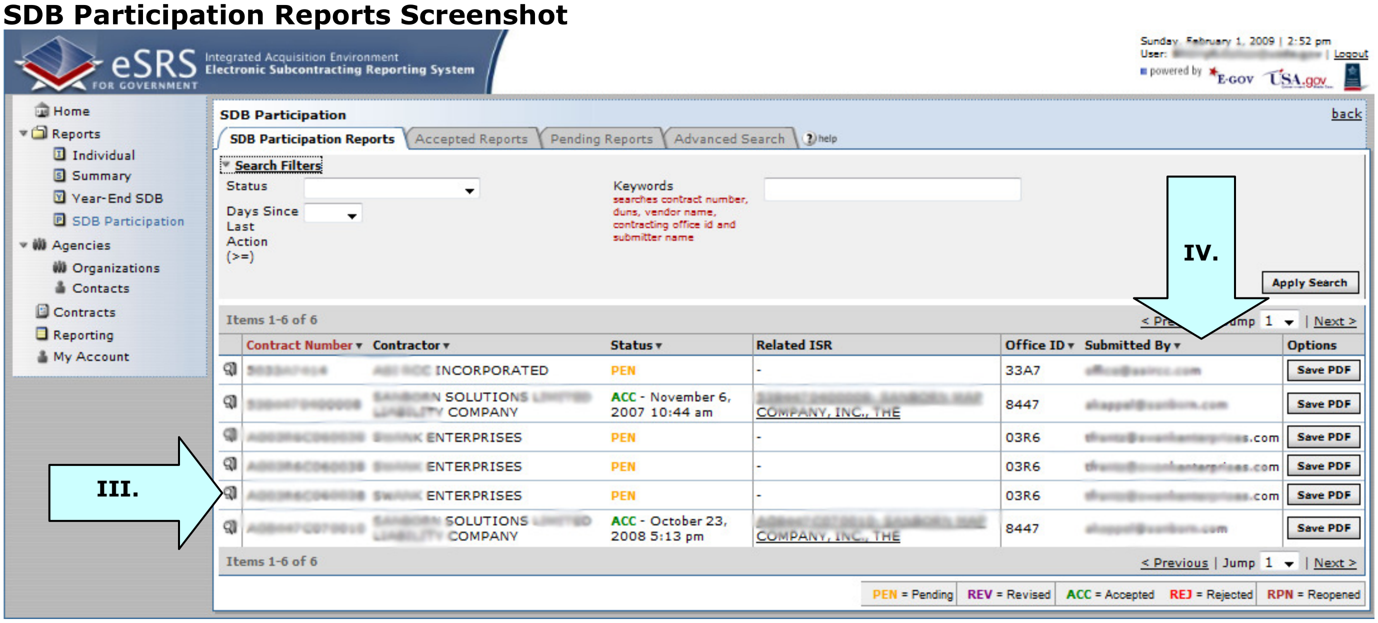
Year-End SDB Reports Screenshot



3.4 SDB Participation

I. Click on "Reports" and then "SDB Participation" on the left hand navigation menu.
   Note: The SDB Participation Report is an optional report.
II. You will see a screen similar to the Year-End SDB 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.

SDB Participation Reports Screenshot

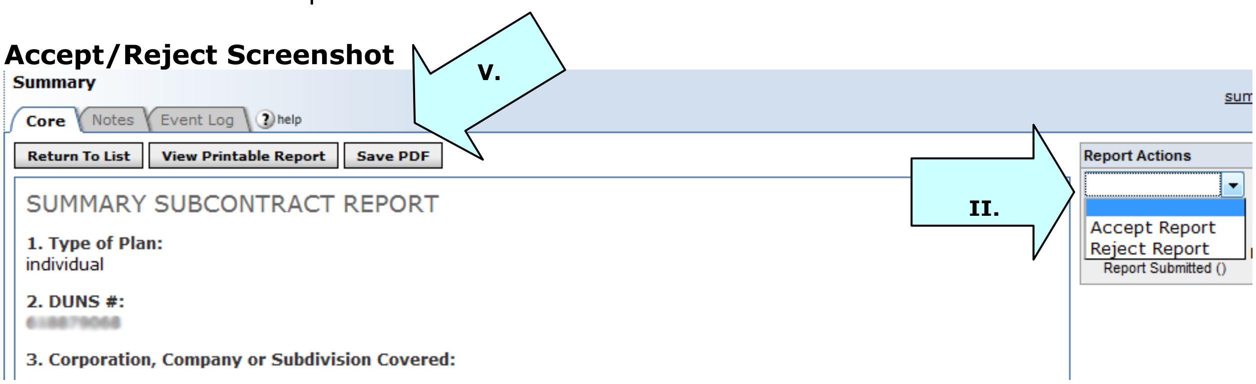


3.5 Accept / Reject (No Administering Agency Designated on Report)

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. **Note, you may only accept/reject Pending or Revised Reports.**
II. Select Accept Report or Reject Report from the "Report Actions" drop down box on the right sidebar.
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.
V. You may also use the buttons along the top to view a print preview, save as PDF, or return to the reports list.

Accept/Reject Screenshot

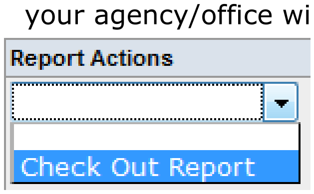


3.6 Accept / Reject (Administering Agency Designated on Report)

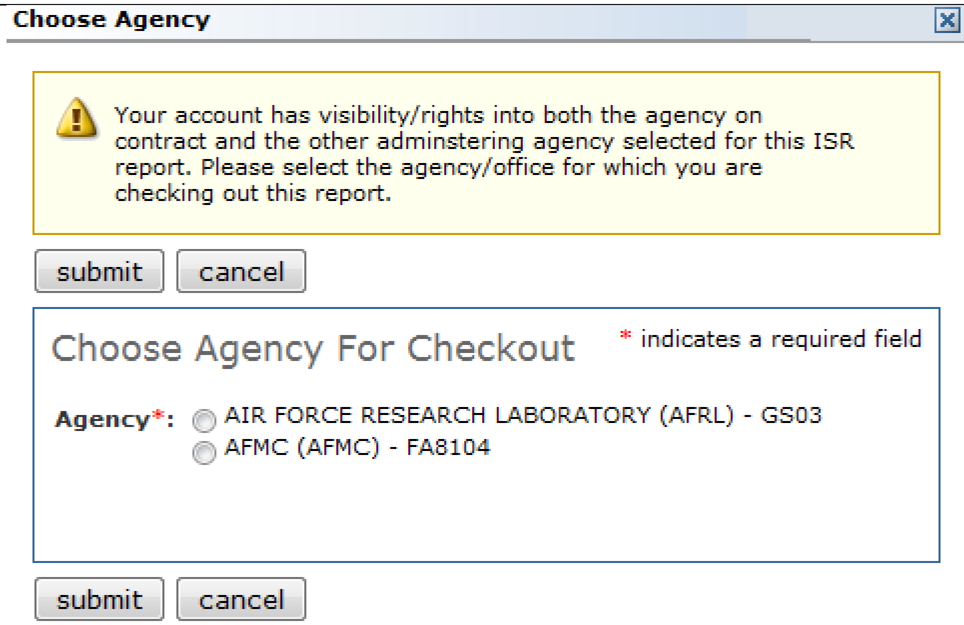
This section will outline the process for managing Individual reports on which the contractor designated an Administering Agency other than the Contracting Office on the contract. The first step is to go to the Individual Reports section. Click on the "Pending" tab near the top of the screen, and find the report that you would like to manage.

3.6.1 Check Out Report

I. Click on the View Icon beside the desired report.
II. Select "Check Out Report" from the "Report Actions" drop down box on the right (see Report Actions screenshot below). **Note:** If you check out the report, only your agency/office will have accept/reject rights for the report.

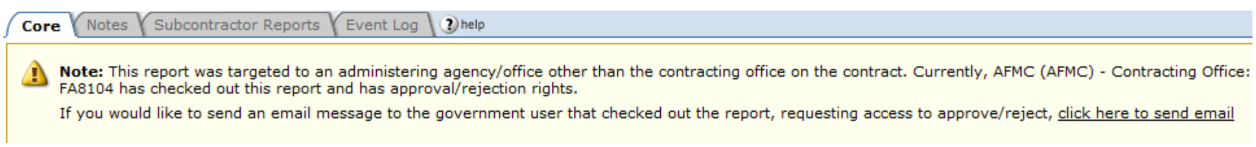


III. **Note:** If you are registered at a level above both the Contracting Office on the contract AND the designated Administering Agency, you will be required to select the Agency/Office for which you are checking out the report.



IV. If the report is already checked out by the other agency involved, you may request access by clicking on the link within the top **"Note"** section. After clicking on the "click here to send email" link, your email client will generate a new email message with the "To" and "Subject" fields pre-populated. The email will be sent to the agency user who currently has the report checked out with the subject "Request Access to ISR Report."

V. If you check out the report, the action will be tracked in the right hand "Action History" sidebar for both involved agencies to view.

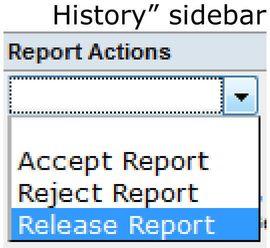


3.6.2 Release Report

I. Click on the View Icon beside the desired report.

II. Select "Release Report" from the "Report Actions" drop down box on the right (see Report Actions screenshot below). **Note:** If you release the report, you will no longer have accept/reject rights for the report.

III. If you release the report, the action will be tracked in the right hand "Action History" sidebar for both involved agencies to view.



3.6.3 Accept/Reject Report

I. If you have the report checked out, you will be able to select "Accept Report" or "Reject Report" from the "Report Actions" drop down box on the right.

II. If you accepted the report, you may return to the report list by clicking on the "Back to Reports List" button. 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.

III. After completing the form, click "Submit" to finalize the rejection. You may also use the buttons along the top to view a print preview, save as PDF, or return to the reports list.

IV. If you accept or reject the report, the action will be tracked in the right hand "Action History" sidebar for both involved agencies to view.

3.6.4 Report Rights

I. At any given time, the Contracting Office and Administering Agency users can view which agency currently has the report checked out, and therefore are able to manage the report. There is a "Report Rights" box visible on the right sidebar for all reports that have an administering agency designated by the contractor on the report.
   a. A red "x" will display next to the agency that does NOT have the report checked out.
   b. A green check mark will display next to the agency that currently has the report checked out.

Report Rights

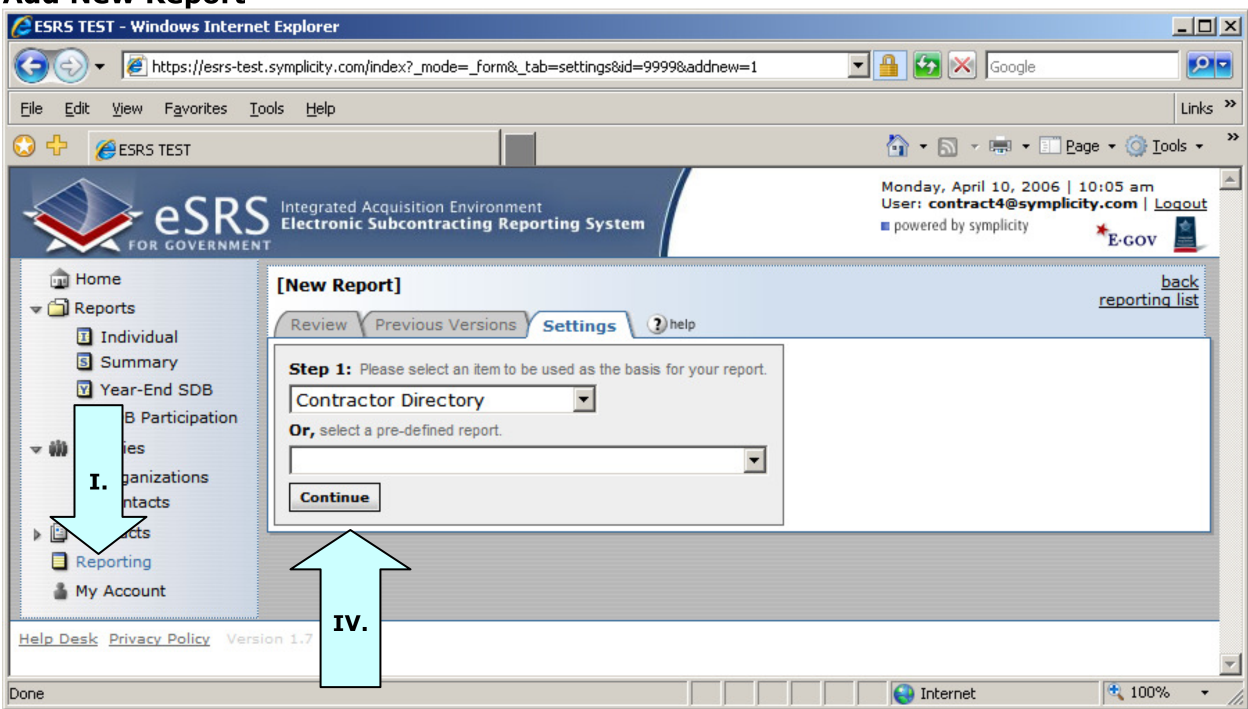
Contracting Office Agency	AIR FORCE RESEARCH LABORATORY (AFRL) - GS03	✗
Admin Agency	AFMC (AFMC) - FA8104	✓

4. Reporting

4.1 Build New Reports

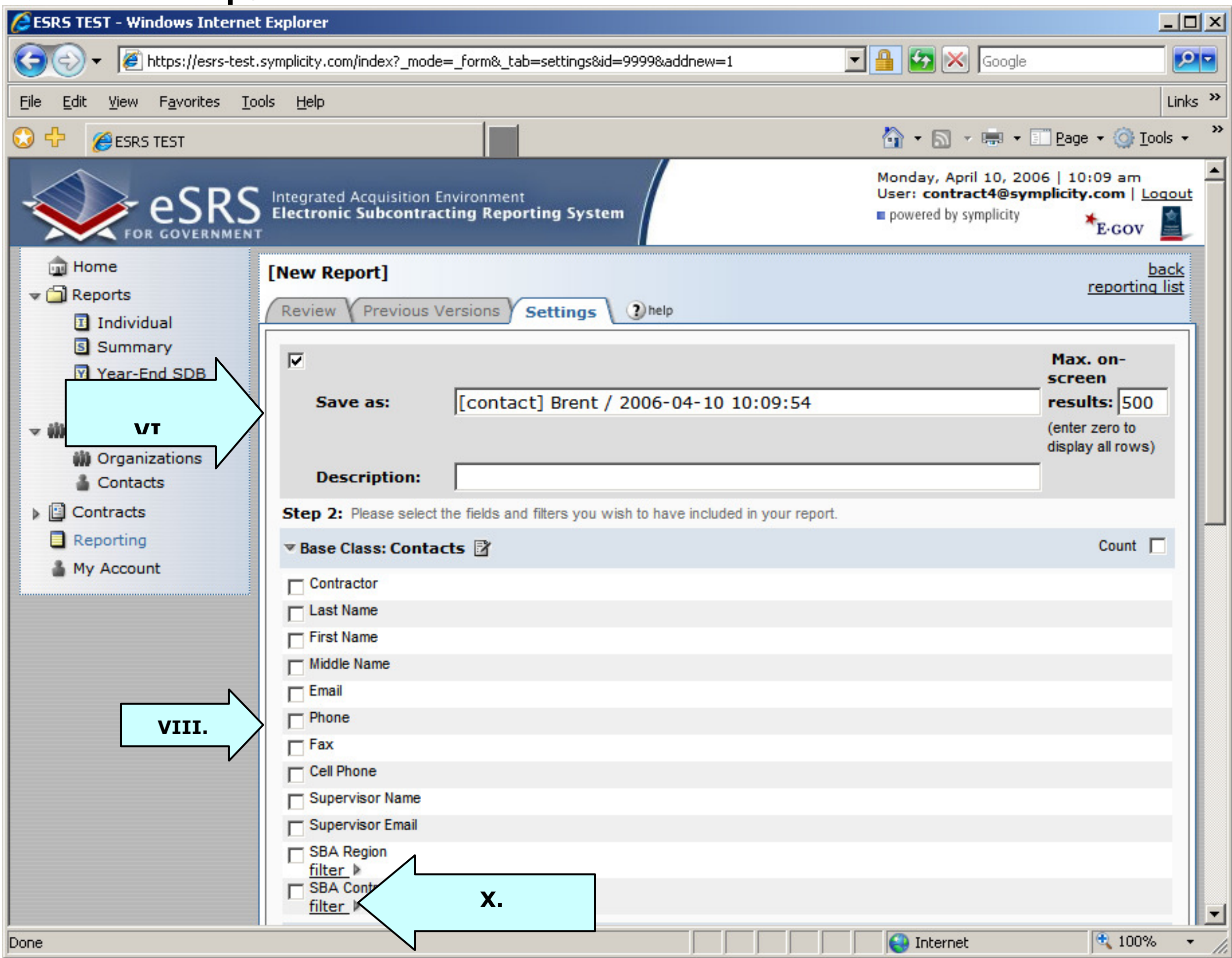
I. Create New Report by clicking on REPORTING on the left navigation menu.
II. Click on Add New
III. You will be taken to a screen similar to the one below.

Add New Report



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

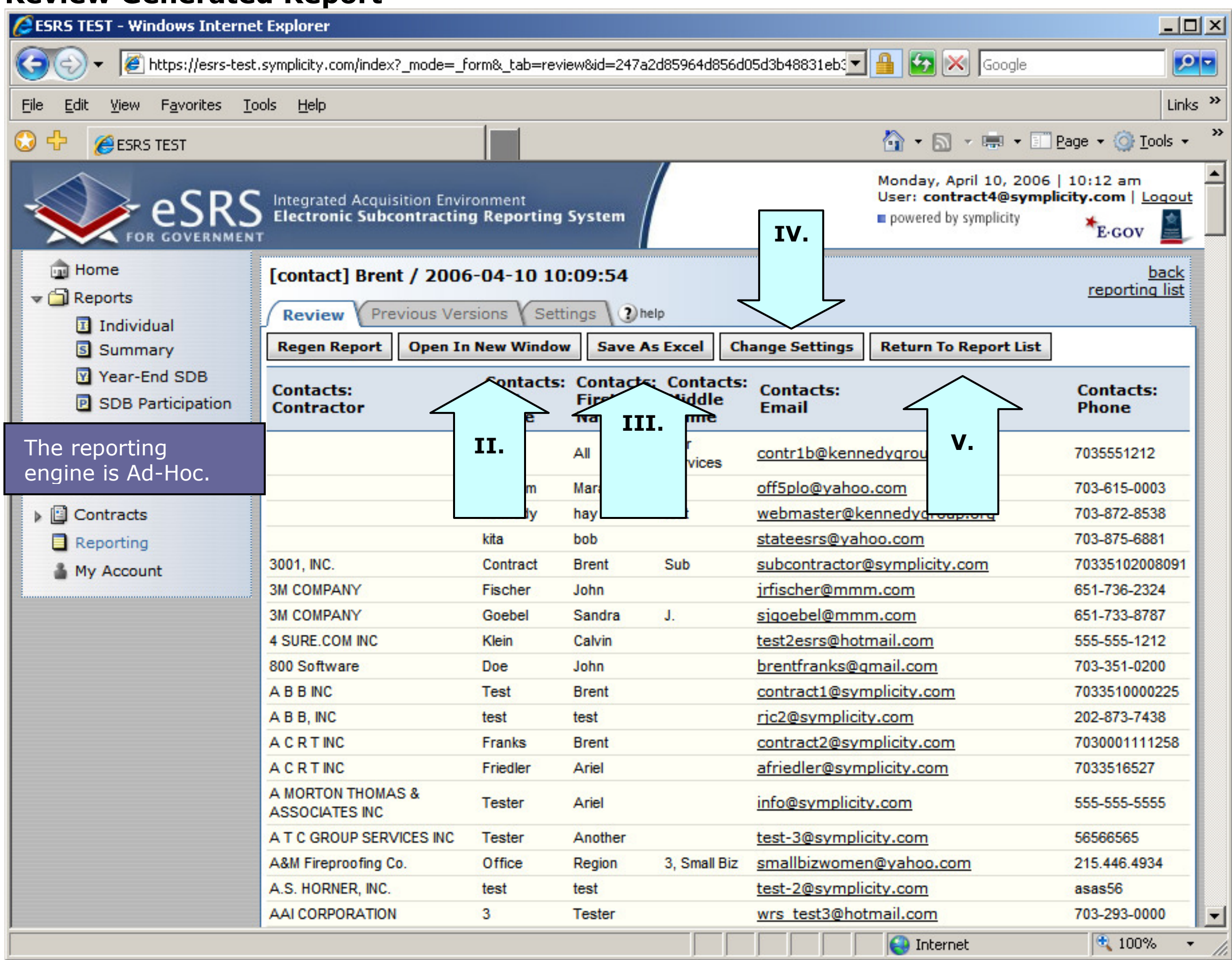
Build a New Report



4.2 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.

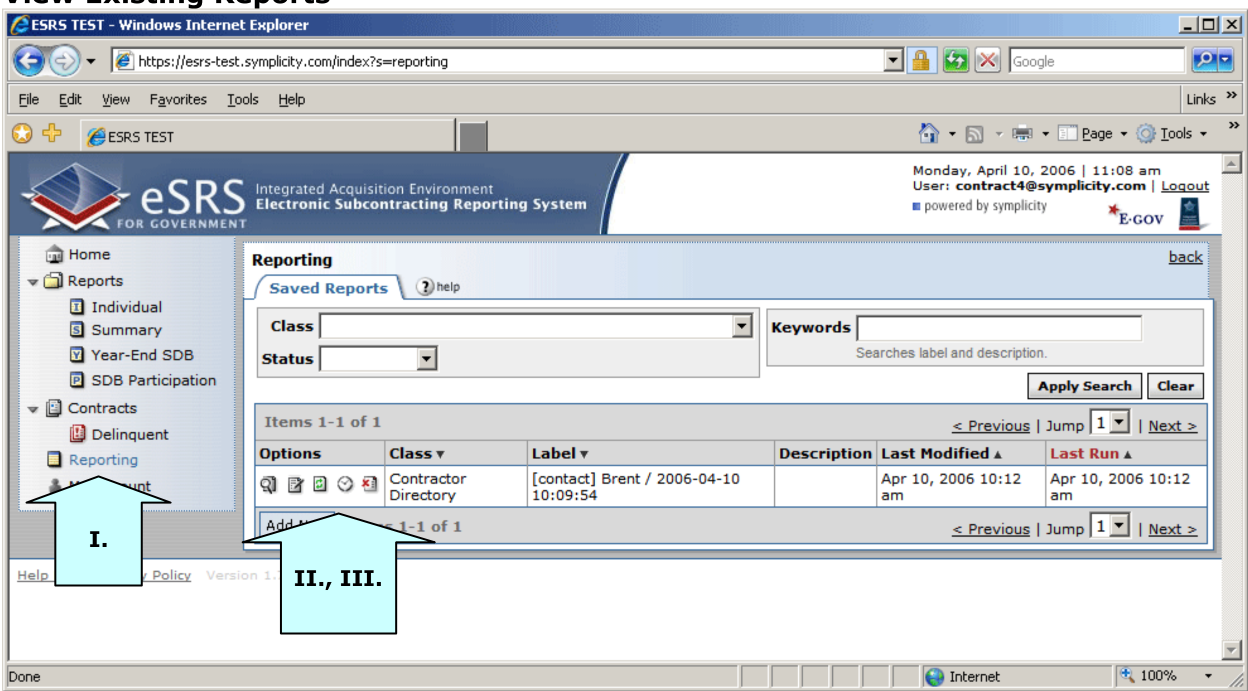
Review Generated Report



4.3 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

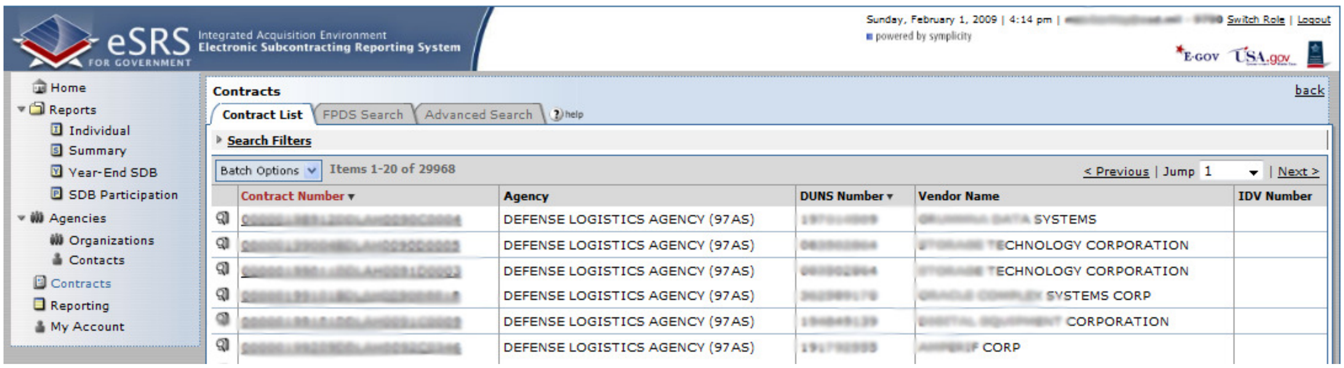


5. Contracts

5.1 Contract List

I. Click "Contracts" on the left hand navigation menu.
II. You will be able to see all contracts associated to your agency and below.
III. Click on the or the contract number to review the details of the contract sent from FPDS-NG.
IV. You may also search for contracts using the Keywords search feature near the top of the screen.

Contract List Screenshot



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. Click on My Account in the left navigation menu.
II. Change the fields that you wish to edit.
III. Click on "Save".

6.2 Change Password

I. Click on My Account in the left navigation menu.
II. Click on the password tab.
III. Enter your new password.
IV. Click on "Save".

Password Change Screen