

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

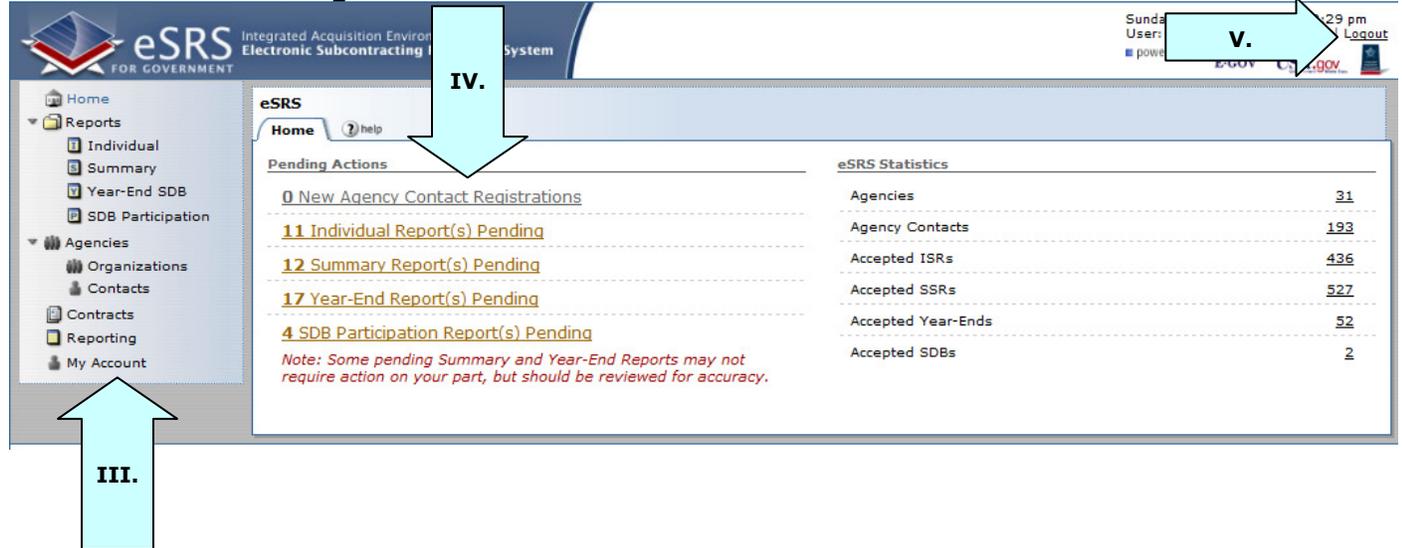
- I. Point your browser to <https://www.esrs.gov/government/>
- II. Click on the "Register" tab.
- III. Select your Agency.
- IV. Complete the forms, clicking continue after you have completed each section.
- V. At the last step, please review the information, and when ready click "Submit Registration"
- 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



The screenshot shows the ESRS Government Users Login Screen. The page title is "eSRS Integrated Acquisition Environment Electronic Subcontracting System". The navigation menu on the left includes: Home, Reports (Individual, Summary, Year-End SDB, SDB Participation), Agencies (Organizations, Contacts), Contracts, Reporting, and My Account. The main content area is titled "eSRS Home" and features a "Pending Actions" section with the following items:

- 0 New Agency Contact Registrations
- 11 Individual Report(s) Pending
- 12 Summary Report(s) Pending
- 17 Year-End Report(s) Pending
- 4 SDB Participation Report(s) Pending

A note below the pending actions states: "Note: Some pending Summary and Year-End Reports may not require action on your part, but should be reviewed for accuracy." To the right of the pending actions is an "eSRS Statistics" table:

eSRS Statistics	
Agencies	31
Agency Contacts	193
Accepted ISRs	436
Accepted SSRs	527
Accepted Year-Ends	52
Accepted SDBs	2

Annotations on the screenshot: III. points to the navigation menu; IV. points to the Pending Actions section; V. points to the Logout link in the top right corner.

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



The screenshot displays the eSRS Summary Reports interface. The left navigation menu includes 'Home', 'Reports', 'Individual', 'Summary', 'Year-End SDB', 'SDB Participation', 'Agencies', 'Organizations', 'Contacts', 'Contracts', 'Reporting', and 'My Account'. The main content area shows a 'Summary' tab with sub-tabs for 'Summary Reports', 'Accepted Summary Reports', 'Pending Summary Reports', and 'Advanced Search'. Below the tabs are search filters for Status, Days Since Last Action, Plan Type, and Keywords. The table below shows a list of reports with columns for Contractor, Status, Approving Agency, Report Period, Report Year, Submitted By, and Options. A red arrow labeled 'III.' points to the 'View' icon in the first row, and a blue arrow labeled 'IV.' points to the 'Status' column header.

Contractor	Status	Approving Agency	Report Period	Report Year	Submitted By	Options
AMT ASSOCIATES INC	REJ	FOOD AND NUTRITION SERVICE (1251)	Oct 1 - Sept 30	2004	hally_pich@babcock.com	Save PDF
AMT ASSOCIATES INC	ACC - March 16, 2006 1:55 pm	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2005	hally_pich@babcock.com	Save PDF
AMT ASSOCIATES INC	ACC - August 15, 2007 8:28 am	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2006	hally_pich@babcock.com	Save PDF
AMT ASSOCIATES INC	ACC - December 12, 2007 1:23 pm	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2007	hally_pich@babcock.com	Save PDF

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

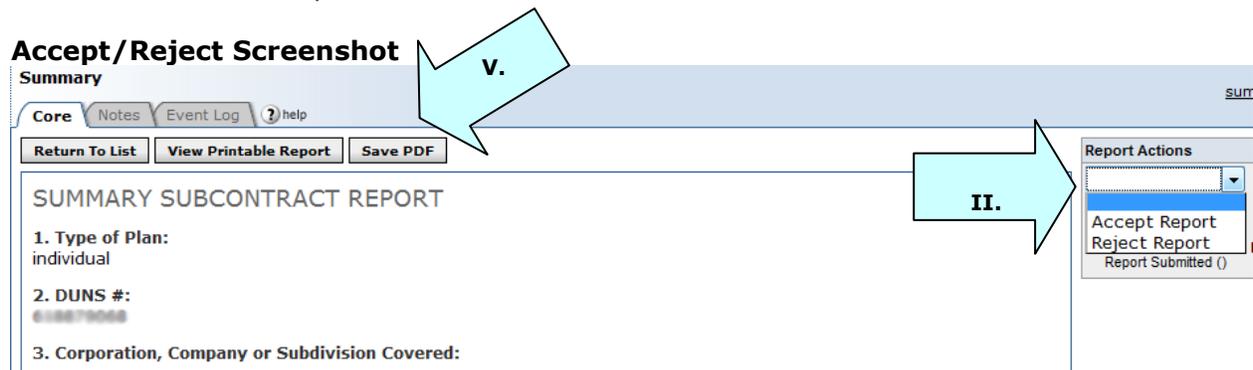
The screenshot displays the eSRS Year-End SDB Reports interface. The left navigation menu includes Home, Reports (Individual, Summary, Year-End SDB, SDB Participation), Agencies (Organizations, Contacts), Contracts (Reporting, My Account), and Home. The main content area is titled 'Year-End SDB' and features search filters for Status, Days Since Last Action, and Keywords. A table lists reports with columns for Contractor, Status, Related SSR, Approving Agency, Date Submitted, and Submitted By. A legend at the bottom defines report statuses: *Italics* = For Review Only, **PEN** = Pending, **REV** = Revised, **ACC** = Accepted, and **REJ** = Rejected. Annotations III and IV highlight the view icon and a column header, respectively.

Contractor ▼	Status	Related SSR	Approving Agency	Date Submitted	Submitted By ▼
<i>XXXXXXXXXX</i>	PEN	<i>Oct 1 - Sept 30, 2006</i>	BOARD OF CONTRACT APPEALS	Feb 20, 2006	bfranks@simplicity.com

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.



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.

Choose Agency ✕

 Your account has visibility/rights into both the agency on contract and the other administering agency selected for this ISR report. Please select the agency/office for which you are checking out this report.

Choose Agency For Checkout * indicates a required field

Agency*: AIR FORCE RESEARCH LABORATORY (AFRL) - GS03
 AFMC (AFMC) - FA8104

- 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.

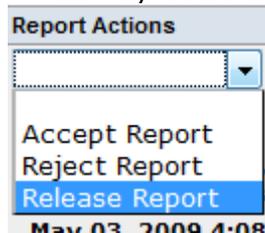
Core | Notes | Subcontractor Reports | Event Log | ? help

 **Note:** This report was targeted to an administering agency/office other than the contracting office on the contract. Currently, AFMC (AFMC) - Contracting Office: FA8104 has checked out this report and has approval/rejection rights.

If you would like to send an email message to the government user that checked out the report, requesting access to approve/reject, [click here to send email](#)

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.

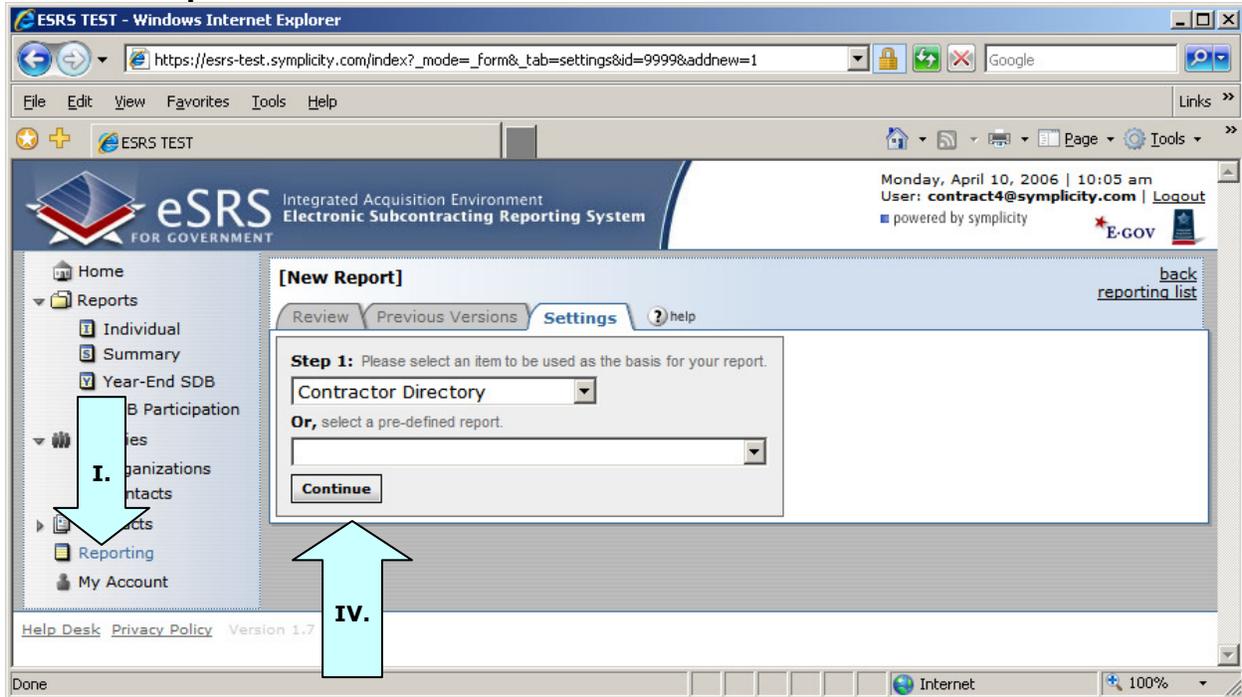
Report Rights		
Contracting Office Agency	AIR FORCE RESEARCH LABORATORY (AFRL) - GS03	✘
Admin Agency	AFMC (AFMC) - FA8104	✔

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 checkmarking 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

ESRS TEST - Windows Internet Explorer

https://esrs-test.simplicity.com/index?_mode=_form&_tab=settings&id=9999&addnew=1

File Edit View Favorites Tools Help

ESRS TEST

Monday, April 10, 2006 | 10:09 am
User: contract4@simplicity.com | Logout
powered by simplicity E-GOV

[New Report] [back reporting list](#)

Review Previous Versions **Settings** ? help

Save as: [contact] Brent / 2006-04-10 10:09:54 **Max. on-screen results:** 500
(enter zero to display all rows)

Description:

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

Base Class: **Contacts** Count

- Contractor
- Last Name
- First Name
- Middle Name
- Email
- Phone
- Fax
- Cell Phone
- Supervisor Name
- Supervisor Email
- SBA Region filter
- SBA Cont filter

VIII.

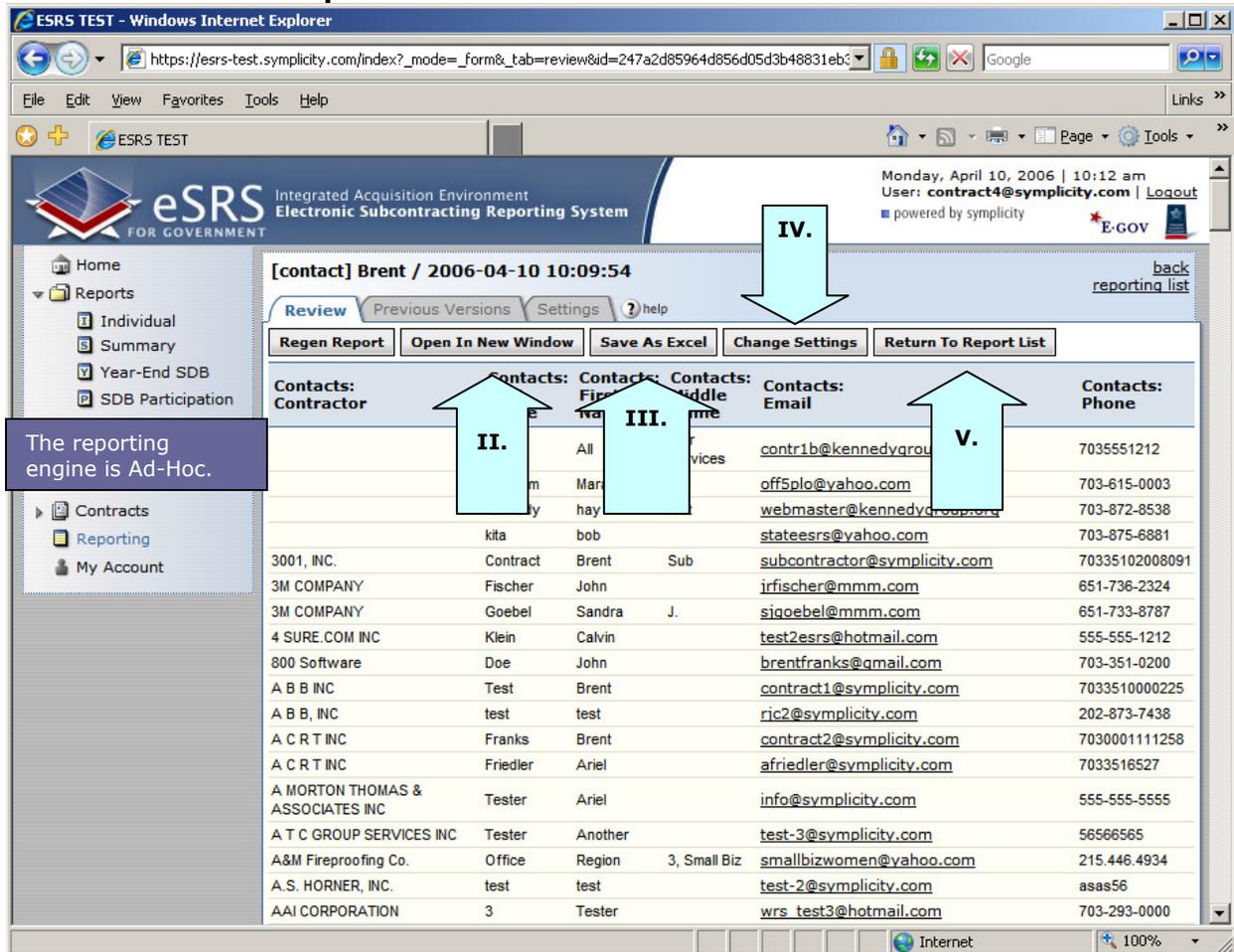
X.

Done Internet 100%

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



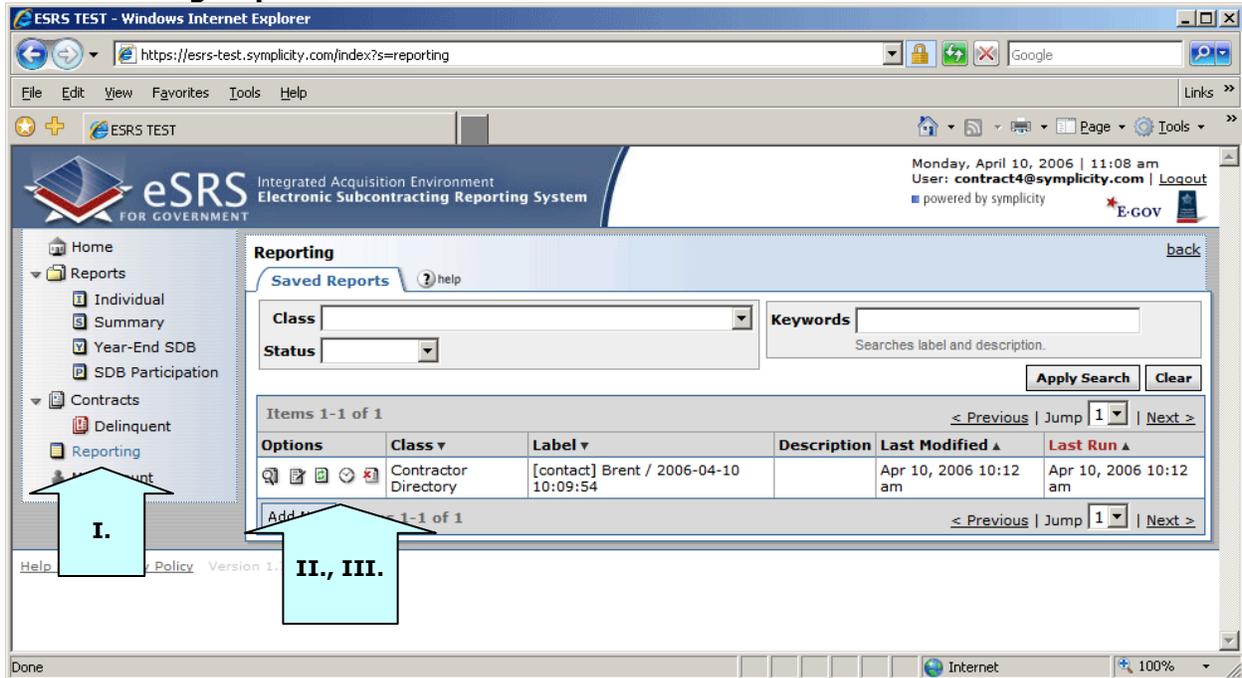
The screenshot shows the ESRS TEST web application interface. The browser title is "ESRS TEST - Windows Internet Explorer". The URL is "https://esrs-test.simplicity.com/index?_mode=_form&_tab=review&id=247a2d85964d856d05d3b48831eb...". The page header includes the ESRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR GOVERNMENT". The user is logged in as "contract4@simplicity.com" on Monday, April 10, 2006, at 10:12 am. The main content area displays a report for "[contact] Brent / 2006-04-10 10:09:54". Below the report title are tabs for "Review", "Previous Versions", "Settings", and "? help". A row of buttons includes "Regen Report", "Open In New Window", "Save As Excel", "Change Settings", and "Return To Report List". A table of contacts is displayed with columns: "Contacts: Contractor", "Contacts: First Name", "Contacts: Middle Name", "Contacts: Last Name", "Contacts: Email", and "Contacts: Phone". Callouts II, III, IV, and V point to the "Open In New Window", "Save As Excel", "Change Settings", and "Return To Report List" buttons respectively. A callout I points to the "View" icon in the report list. A callout VI points to the "back reporting list" link. A text box on the left states "The reporting engine is Ad-Hoc."

Contacts: Contractor	Contacts: First Name	Contacts: Middle Name	Contacts: Last Name	Contacts: Email	Contacts: Phone
	All		Services	contr1b@kennedygrou	7035551212
	off5plo@yahoo.com			off5plo@yahoo.com	703-615-0003
	webmaster@kennedygrou			webmaster@kennedygrou	703-872-8538
	kita	bob		stateesrs@yahoo.com	703-875-6881
3001, INC.	Contract	Brent	Sub	subcontractor@symplicity.com	70335102008091
3M COMPANY	Fischer	John		jfischer@mmm.com	651-736-2324
3M COMPANY	Goebel	Sandra	J.	sigoebel@mmm.com	651-733-8787
4 SURE.COM INC	Klein	Calvin		test2esrs@hotmail.com	555-555-1212
800 Software	Doe	John		brentfranks@gmail.com	703-351-0200
A B B INC	Test	Brent		contract1@symplicity.com	7033510000225
A B B, INC	test	test		ric2@symplicity.com	202-873-7438
A C R T INC	Franks	Brent		contract2@symplicity.com	7030001111258
A C R T INC	Friedler	Ariel		afriedler@symplicity.com	7033516527
A MORTON THOMAS & ASSOCIATES INC	Tester	Ariel		info@symplicity.com	555-555-5555
A T C GROUP SERVICES INC	Tester	Another		test-3@symplicity.com	56566565
A&M Fireproofing Co.	Office	Region	3, Small Biz	smallbizwomen@yahoo.com	215.446.4934
A.S. HORNER, INC.	test	test		test-2@symplicity.com	asas56
AAI CORPORATION	3	Tester		wrs_test3@hotmail.com	703-293-0000

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



The screenshot displays the eSRs Reporting interface. The left navigation menu includes 'Home', 'Reports' (with sub-items: Individual, Summary, Year-End SDB, SDB Participation), 'Contracts' (with sub-items: Delinquent), and 'Reporting'. The 'Reporting' section is active, showing a search form for 'Saved Reports'. The search form includes fields for 'Class' and 'Status', a 'Keywords' search box, and 'Apply Search' and 'Clear' buttons. Below the search form, a table displays one report item:

Options	Class	Label	Description	Last Modified	Last Run
   	Contractor Directory	[contact] Brent / 2006-04-10 10:09:54		Apr 10, 2006 10:12 am	Apr 10, 2006 10:12 am

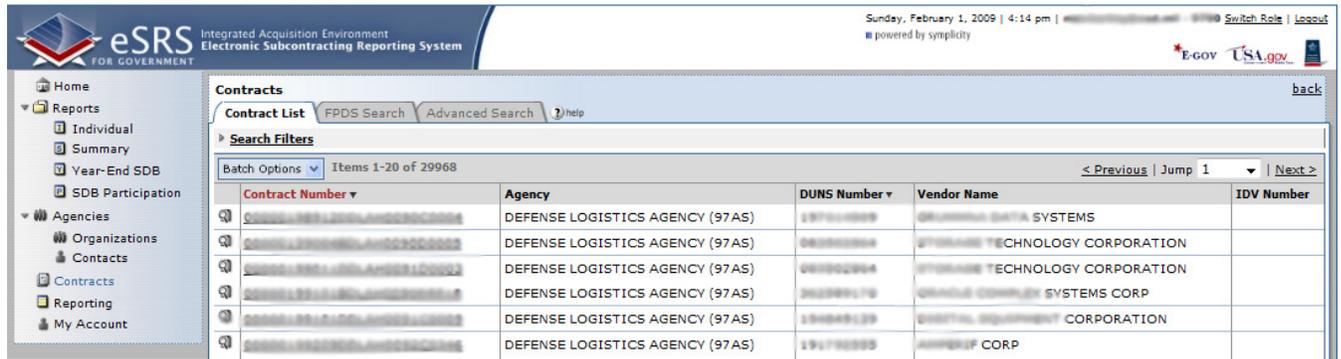
Red arrows indicate the steps: Arrow 'I.' points to the 'Reporting' menu item, and arrow 'II., III.' points to the report row in the table.

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



The screenshot shows the eSRS (Electronic Subcontracting Reporting System) interface. The top navigation bar includes the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System". The right side of the header shows the date "Sunday, February 1, 2009 | 4:14 pm" and links for "Switch Role" and "Logout". Below the header, there is a "Contracts" section with tabs for "Contract List", "FPDS Search", and "Advanced Search". A "Search Filters" section is visible above the table. The table displays a list of contracts with the following columns: Contract Number, Agency, DUNS Number, Vendor Name, and IDV Number. The table shows 10 items, with the first five visible in the screenshot.

Contract Number	Agency	DUNS Number	Vendor Name	IDV Number
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	197110000	GRUNNIG DATA SYSTEMS	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	062000004	STORAGE TECHNOLOGY CORPORATION	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	062000004	STORAGE TECHNOLOGY CORPORATION	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	362000170	GRAND COMPLEX SYSTEMS CORP	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	198481129	CENTRAL EQUIPMENT CORPORATION	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	191700000	AMPERIF CORP	

6. My Account

6.1 General Information

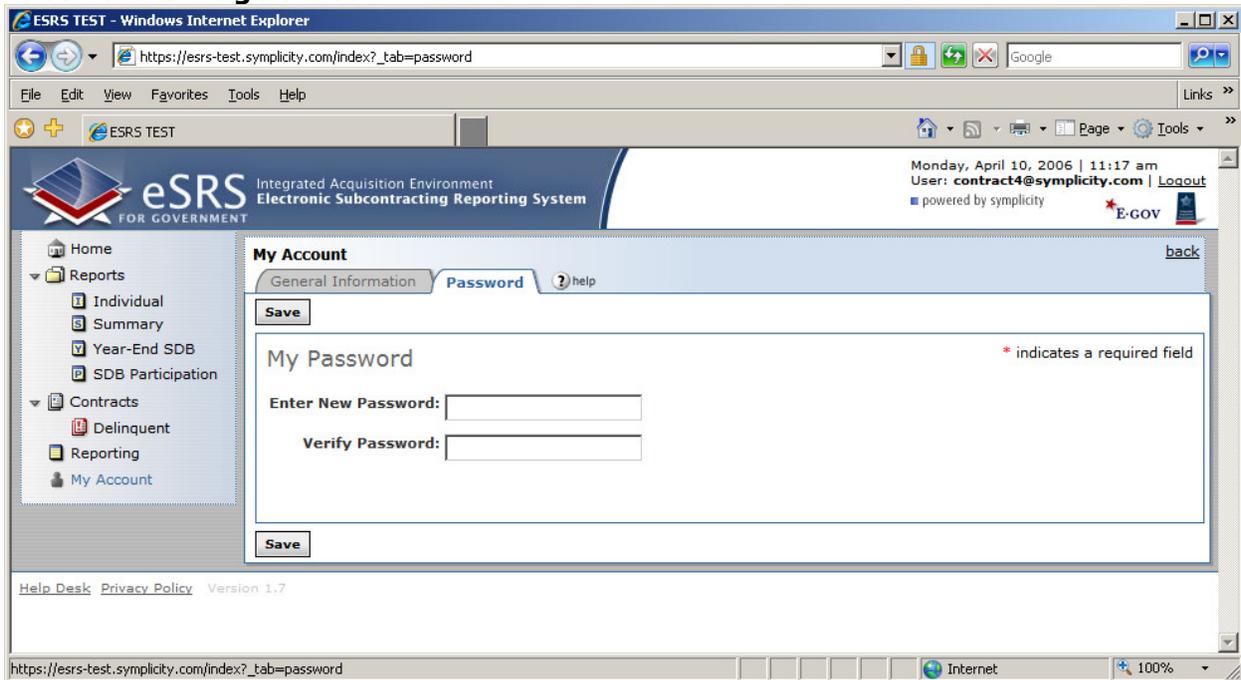
My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

- 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



ESRS TEST - Windows Internet Explorer

https://esrs-test.symplicity.com/index?_tab=password

Monday, April 10, 2006 | 11:17 am
 User: contract4@symplicity.com | Logout
 powered by symplicity E-GOV

My Account [back](#)

General Information **Password** [help](#)

Save

My Password * indicates a required field

Enter New Password:

Verify Password:

Save

Help Desk Privacy Policy Version 1.7

https://esrs-test.symplicity.com/index?_tab=password