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Electronic Subcontracting Reporting System (ESRS)

Contractor Guide 1.7

Table of Contents

1. Log-In to ESRS

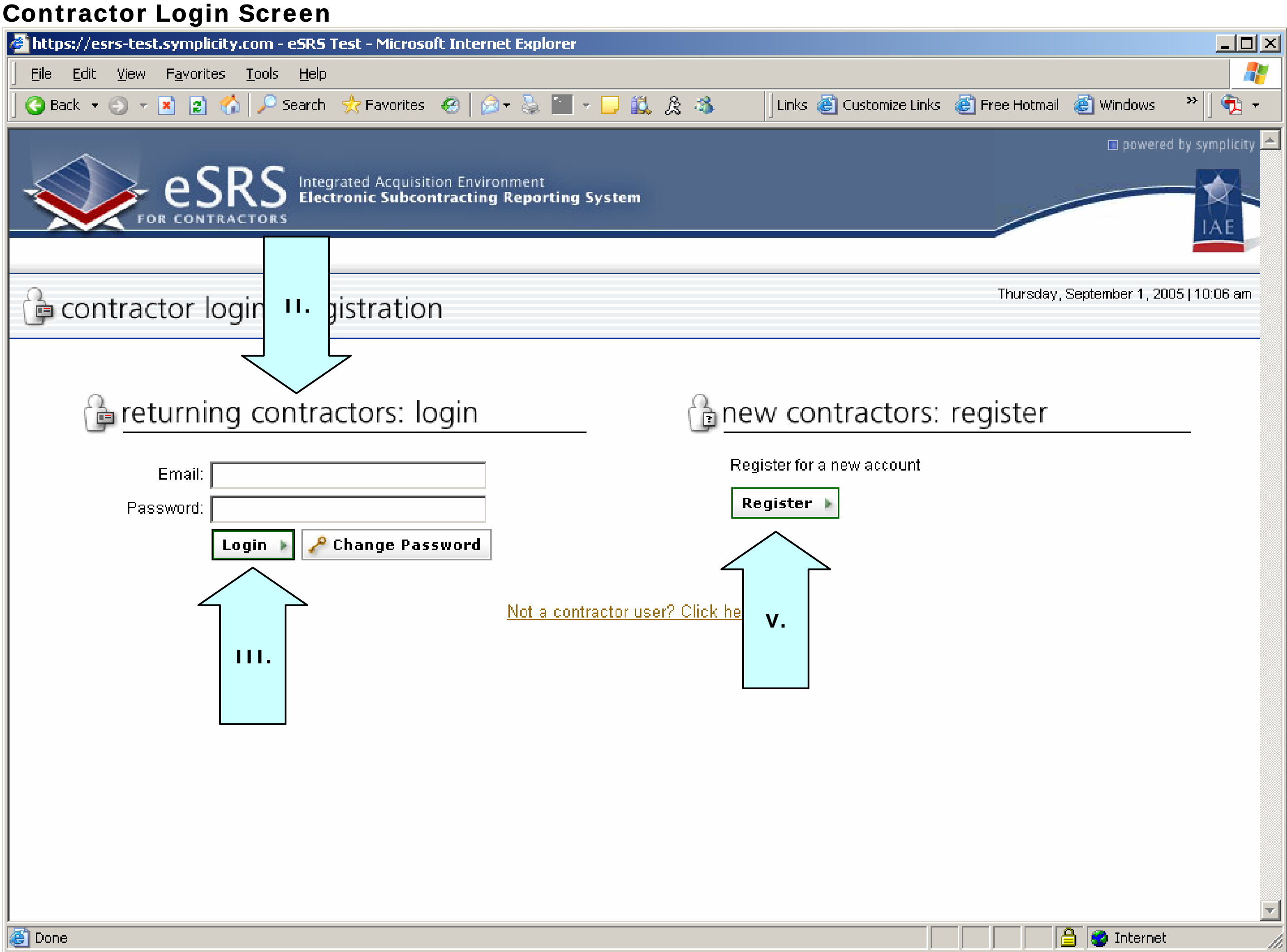
1.1 Existing Users

I. Point your browser to https://www.esrs.gov/
II. Click on “Contractor”. You should see a screen similar to the one below.
III. Login to ESRS by typing your e-mail address and password under the “returning contractors: login”
IV. Click “Login”

1.2 New Users

I. Point your browser to https://www.esrs.gov/
II. Click on “Contractor”
III. Click “Register” (Continued below screenshot)

Contractor Login Screen



IV. Note, throughout the system the red asterisk (*) designates that the field is required.
V. Enter your DUNS Identification Number.

VI. Click 

VII. Some data may already be populated from CCR. Please complete all fields on the form.

VIII. Click on the  button.

IX. You will now be placed at the "Registration Step 2 of 2" page. An e-mail will be sent to the account that you specified on the previous step. Please follow the directions in the e-mail and confirm your account.

X. After you have confirmed your registration, return to the login page.

XI. Enter your e-mail address and password and click .

2. myESRS

After successfully logging in to ESRS, you will see a screen similar to the “myESRS Screenshot” below.

2.1 myESRS Page Features

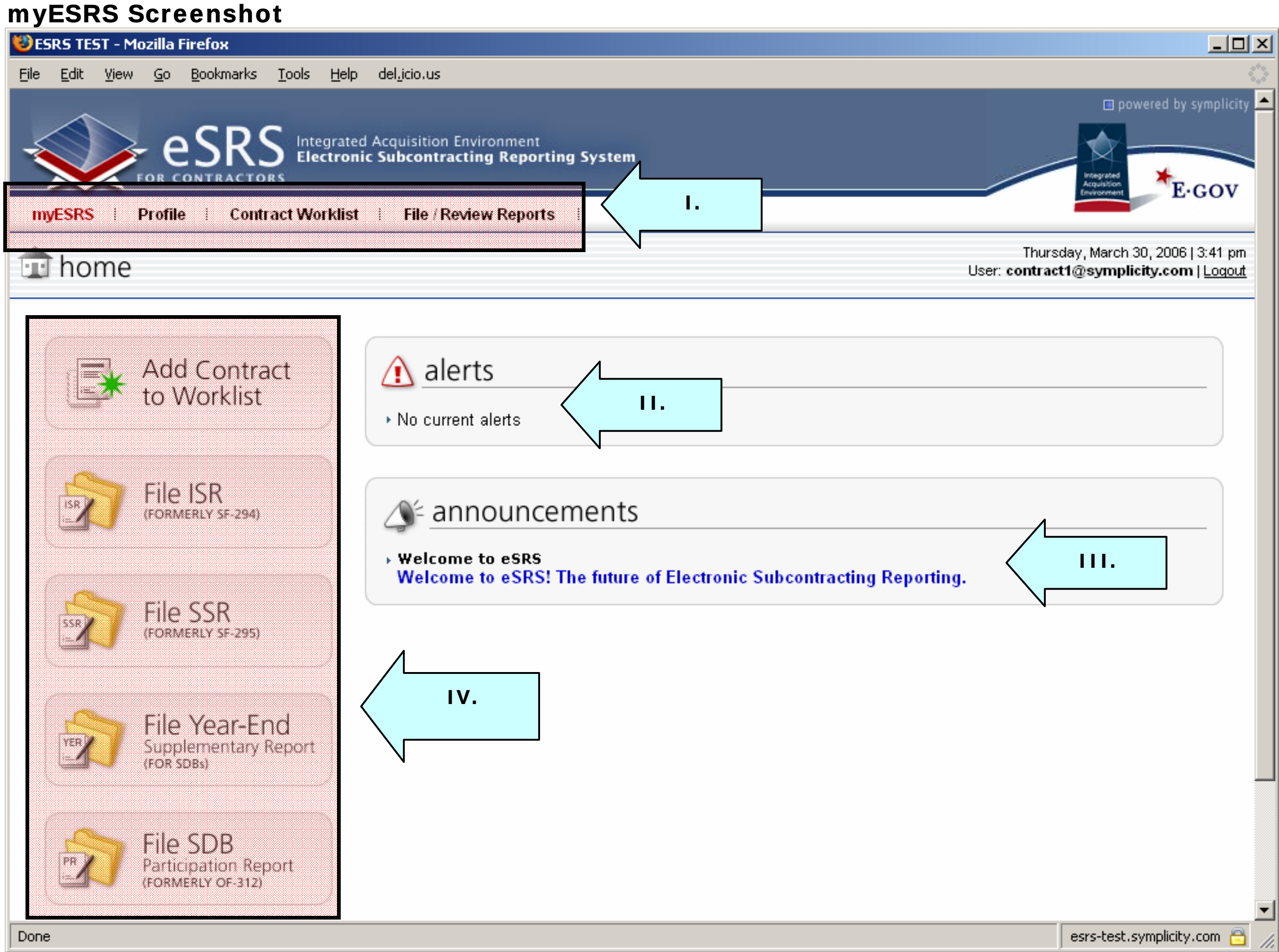
I. The Navigation bar at the top of the screen allows you to move through the system. Additionally, this bar is available on every screen throughout the system. For more information, please read “Section 2.2 Navigation Bar” for more information.

II. The “Alerts” section will show messages that require your attention.

III. Announcements are created by ESRS administrators.

IV. The buttons on the left hand side of the screen allow you to quickly create a new ISR, SSR, or link a contract to your account. Please see the corresponding sections of this manual for more information.

myESRS Screenshot



2.2 Navigation Overview

Please note, the eSRS uses the notion of "sticky-pages". When you visit a section (e.g. Individual Subcontract Reports) and begin working on a report, and then click out of the section and go into another (e.g. Contract Worklist) you will remain on the same page in each section you visit as long as you are logged in. In other words, if you click back into "Individual Subcontract Reports", you will remain at the last location you were prior to leaving the section.

myESRS:

myESRS will return you to the home page.

Profile:

The profile page allows you to edit your account and contact information. Please turn to "Section 3, Profile" of this manual for more information.

Contract Worklist:

The Contract worklist allows you to view all contracts that have been linked to your account. Please turn to "Section 4, Contract Worklist" of this manual for more information.

File / Review Reports:

Individual Subcontract Reports:

The Individual Subcontract Reports area allows you to add and review ISR's. Please turn to "Section 5, Individual Subcontract Reports" of this manual for more information.

Summary Subcontract Reports:

The Summary Subcontract Reports area allows you to add and review SSR's. Please turn to "Section 6, Summary Subcontract Reports" of this manual for more information.

Year-End Supplementary Report for SDBs

This section allows you to file and/or review Year-End Supplementary Report for SDBs. Please go to "Section 8, Year-End Supplementary Report for SDBs" of this manual for more information.

SDB Participation Report (Form 312)

This section allows you to file and/or review the optional SDB Participation Report (Form 312). Please go to "Section 9, Year-End Supplementary Report for SDBs" of this manual for more information.

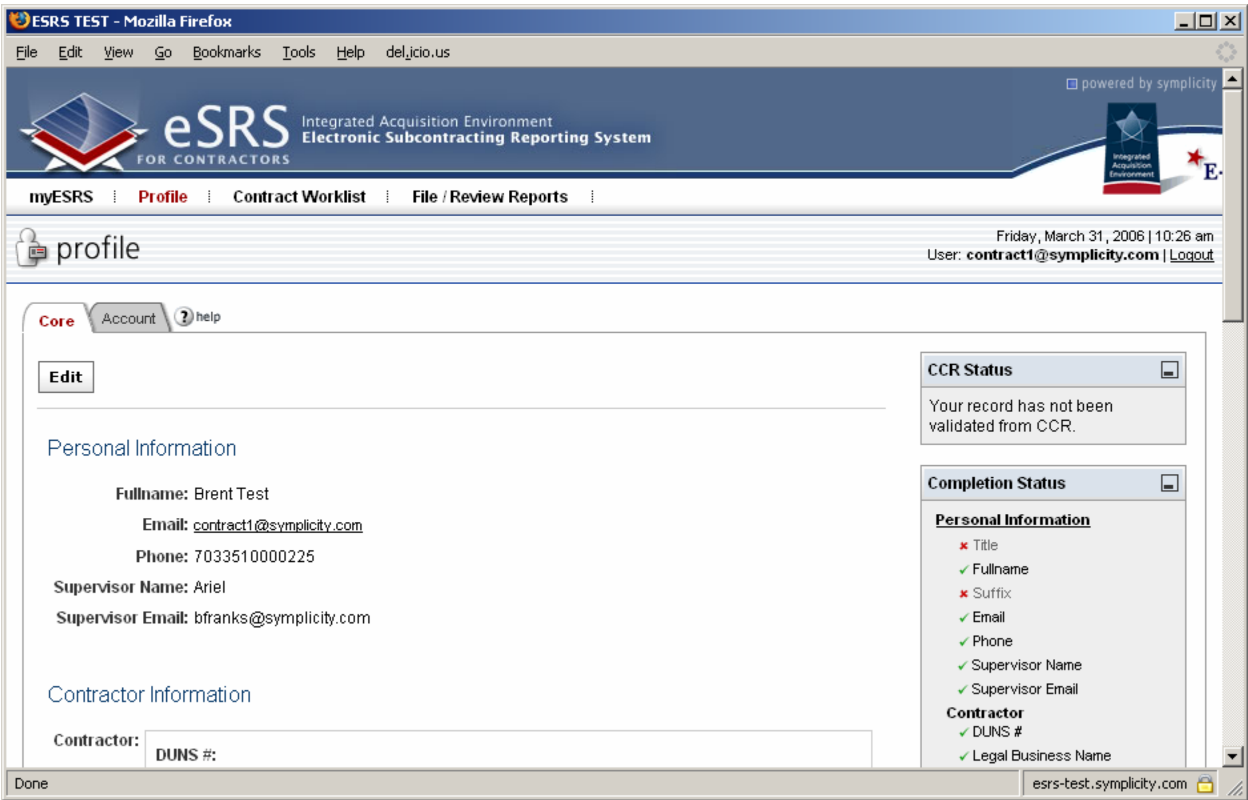
Batch Upload Reports

The batch upload section allows you to download a Microsoft® Excel™ template that can then be exported to a CSV (comma separated value) or tab delimited file and then imported into eSRS. This feature allows you to file multiple reports at once . Please see "Section 10, Batch Uploads" of this manual for more information.

3. Profile

I. Click on “Profile” on the navigation bar.
II. You can review your core contact information on this screen.
III. To edit your information, simply click the **Edit** button.
IV. After editing the information, click on the **Submit** button.
V. **To change your password**, click on the “Account” tab near the top of the page.
VI. You may enter your new password here. Click “Save Password” when done.

Profile

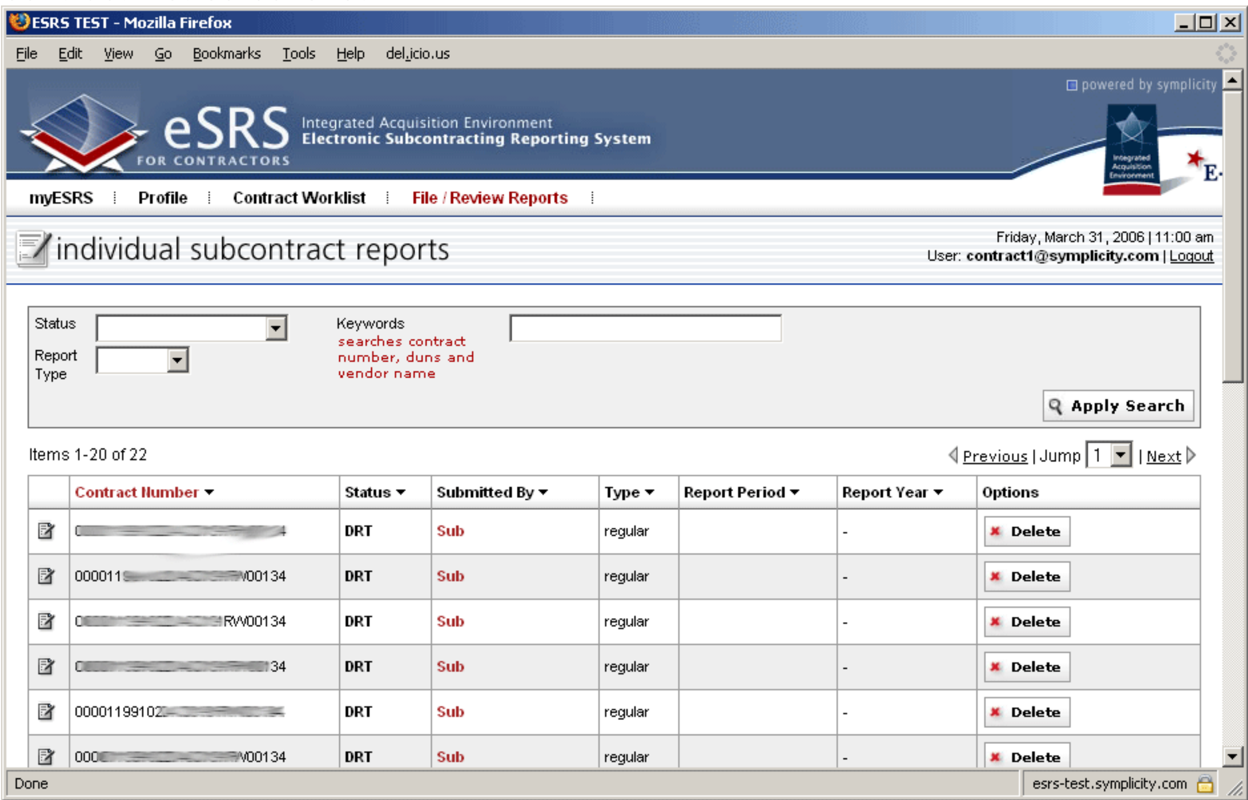


4. Contract Worklist

4.1 View Existing

I. Click on “Contract Worklist” on the navigation bar.
II. A screen similar to the “Contract List Screenshot” below will appear.
III. You may sort the list of contracts. 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.
IV. To view the details of an existing contract, click on the View Icon beside the contract, or click on the Contract Number.
V. You are now able to review more information regarding the contract. If you wish to edit the information, click on the button.
VI. You can also enter reports or view-lower tier reports. Click on the tabs beside the “Contract Details” tab to toggle between the views.
(Note: for more information regarding adding reports, please see the corresponding section of this manual)
VII. After entering “Edit Mode” click the “Save” button to save your changes.

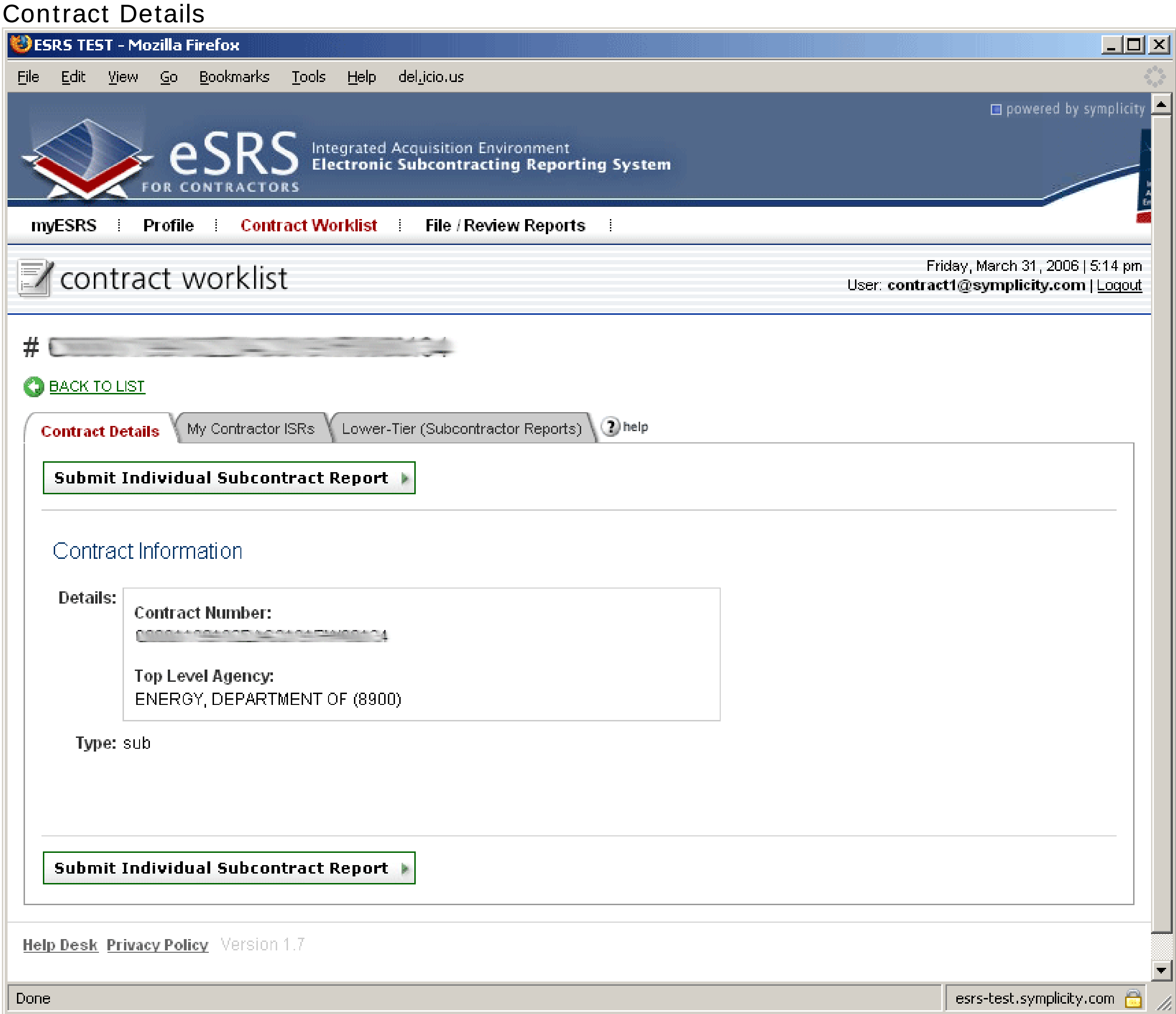
Contract List Screenshot



4.2 Add New

I. Click on “Contract Worklist” on the navigation bar.
II. To add a new contract to your worklist, click on the **Add New Contract To Worklist** button.
III. Enter the Contract #.
IV. Click **Submit**
V. Select whether your organization is a “Prime” or “Subcontractor”.
VI. You will now be directed to the “contract details” page for the contract you just added. To return to the Contract Worklist, click on the BACK TO LIST button within the system (note: do not click your browser’s back button).

Contract Details



5. Individual Subcontract Reports

5.1 View Existing

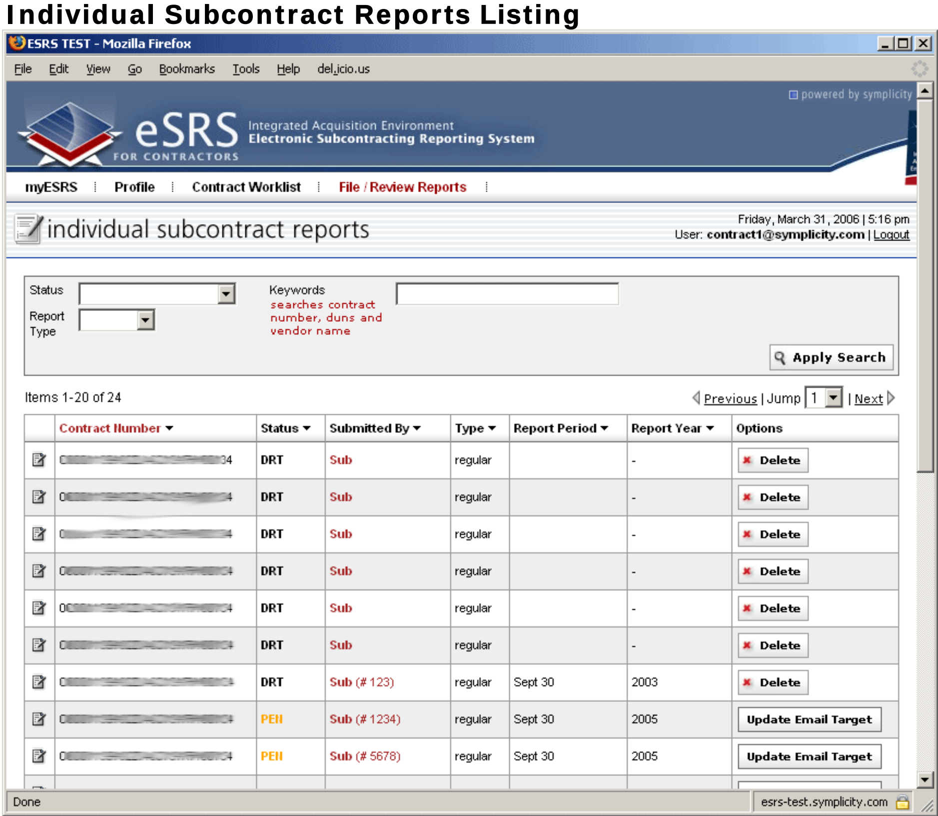
I. Click on “File / Review Reports” on the navigation bar.
II. Click on Individual Subcontract Reports on the drop down.
III. You will be directed to a screen similar to the “Individual Subcontract Reports Screenshot” below.
IV. The status for each report is displayed in the status column.
Notice on the bottom of the page, a legend appears:

DRT = Draft	PEN = Pending	REV = Revised	ACC = Accepted	REJ = Rejected

Draft: You began working on a report, however did not complete it and/or submit it for approval.
Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.
Revised: The report has been revised by a government official.
Accepted: A government official has accepted your report.
Rejected: A government official has rejected your report.

V. To view the details of a submitted report, click on the View Icon beside the report.
VI. If the report has been rejected, you may click on the “Rejection Notes” tab to view the reason why the report has been rejected.
VII. To return to the report list, click the “Cancel” button at any time.

Individual Subcontract Reports Listing



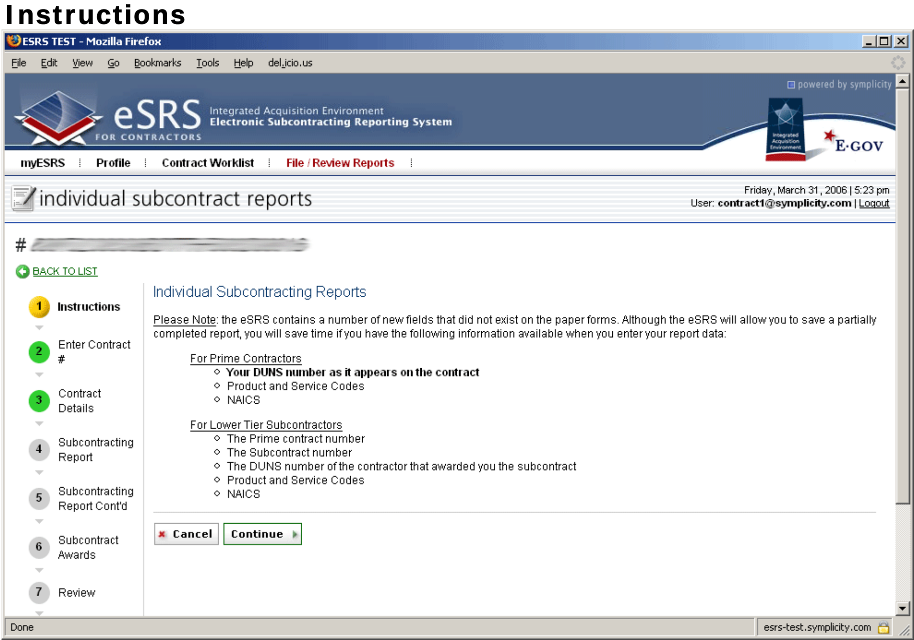
5.2 File New Individual Subcontract Report

There are two different methods to file a new Individual Subcontract Report. The first method allows you to easily file a new Individual Subcontract Report from the "myESRS" homepage. Simply click on the "File ISR" (formerly SF 294)" button (shown to right) or follow the method below.

I. Click on "File / Review Reports" on the navigation bar.
II. Click on Individual Subcontract Reports on the drop down.
III. To file a new report, click on the Add New button.
IV. You will be taken to the Instructions page similar to the screenshot below. Please take time to read the instructions.
V. Click on the Continue when ready.
VI. Select a contract from the drop down box or manually enter the contract number. Click Continue.
VII. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. (*Note, Click on the context sensitive* help *button beside the fields for more information*)
VIII. On step 8, click the Submit button to send the report.
IX. You may now return to view existing reports (Section 5.1, p. 10) to view the status of the report you just entered.
X. In order to completely submit the report, you must click "Submit" on step 8 (Designated on the left hand side of the screen) of the report submission process.

Note: On step 6 of the report submission process, you **must** fill out either the "Percentage of Total Subcontract Awards" OR "Percentage of Total Contract Value" field for Part 3. SMALL DISADVANTAGED BUSINESS (SDB) CONCERNS.

Instructions



6. Summary Subcontract Reports

6.1 View Existing

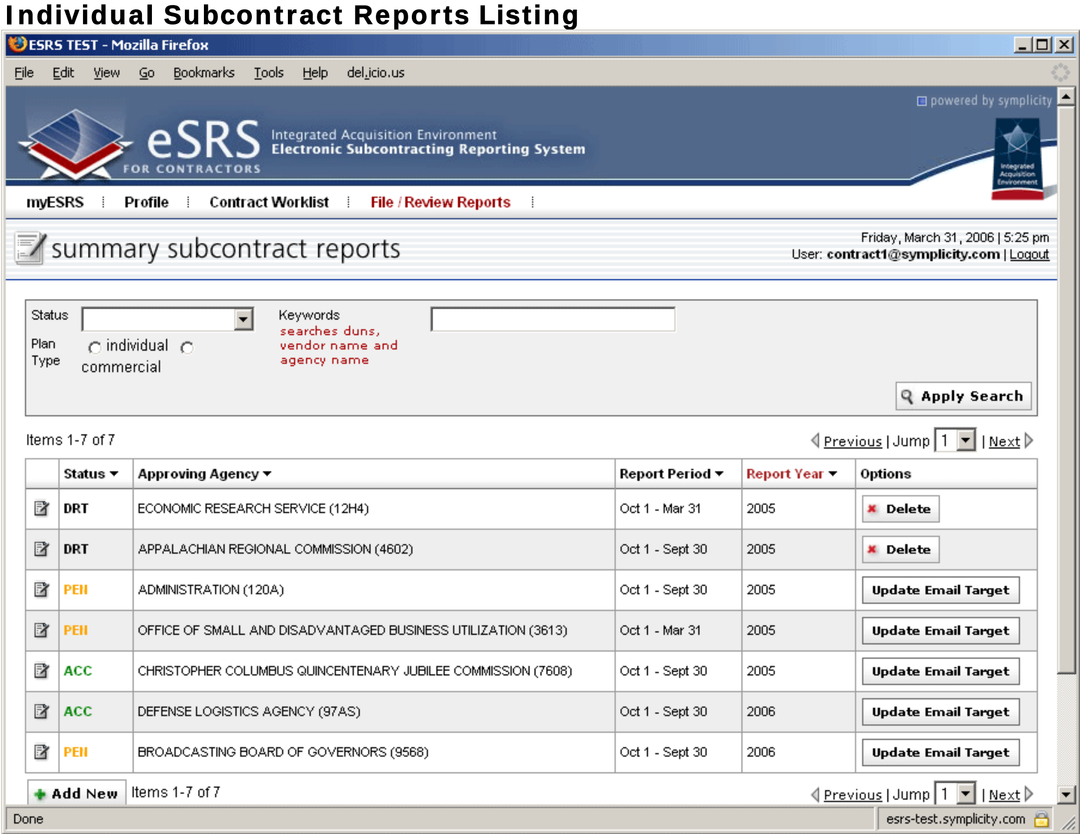
I. Click on "File / Review Reports" on the navigation bar.
II. Click on Summary Subcontract Reports on the drop down.
III. You will be directed to a screen similar to the "Summary Subcontract Reports Screenshot" below.
IV. The status for each report is displayed in the status column. Notice on the bottom of the page, a legend appears:

DRT = Draft	PEN = Pending	REV = Revised	ACC = Accepted	REJ = Rejected

Draft: You began working on a report, however did not complete it and/or submit it for approval.
Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.
Revised: The report has been revised by a government official.
Accepted: A government official has accepted your report.
Rejected: A government official has rejected your report.

V. To view the details of a submitted report, click on the View Icon beside the report.
VI. If the report has been rejected, you may click on the "Rejection Notes" tab to view the reason why the report has been rejected.
VII. To return to the report list, click the "Cancel" button at any time.

Individual Subcontract Reports Listing



6.2 File New Summary Subcontract Report

There are two different methods to file a new Summary Subcontract Report. The first method allows you to easily file a new SSR from the "myESRS" homepage. Simply click on the "File SSR" (formerly SF 295) button (shown to right) or follow the method below.

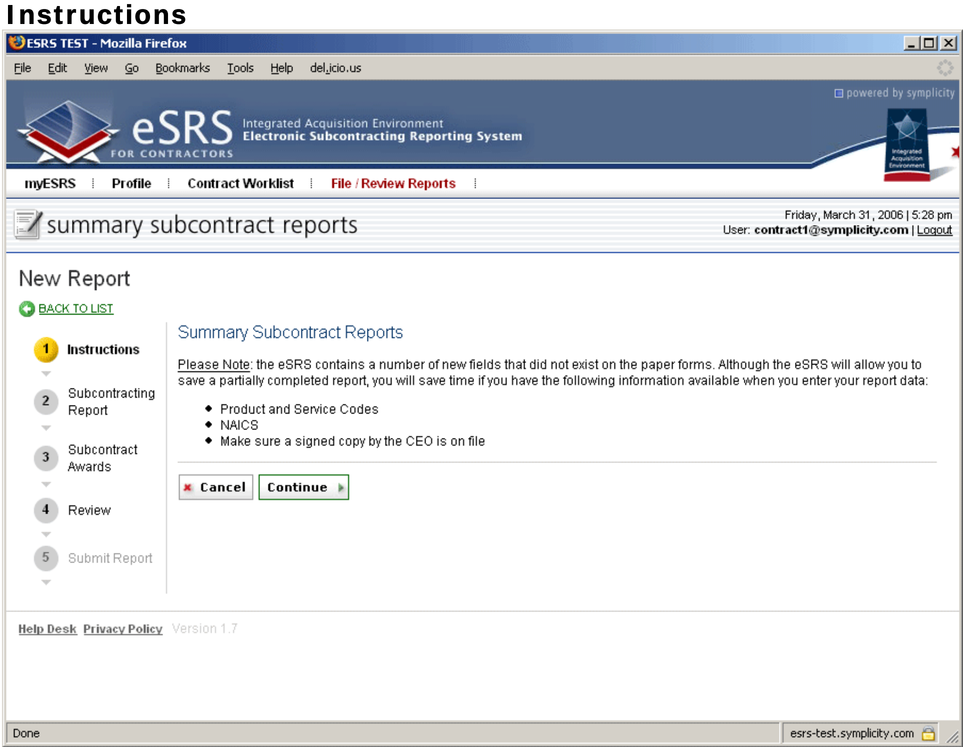
I. Click on "File / Review Reports" on the navigation bar.
II. Click on Summary Subcontract Reports on the drop down.
III. To file a new report, click on the  button.

IV. You will be taken to the instructions page similar to the screenshot below. Please take time to read the instructions.
V. Click on the  when ready.

VI. Select the Agency that you wish to file a report to. *(If the report is a commercial plan report, you can select multiple agencies. Please make sure to select an approver.)*
VII. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. (*Note, Click on the context sensitive* 

button beside the fields for more information)
VIII. On step 5, click the Submit button to send the report.
IX. You may now return to view existing reports (Section 6.1, p. 12) to view the status of the report you just entered.

Instructions



7. Individual Subcontract Reports

Filing reports as a subcontractor allows the next higher tier contractor to see your filing. In order to correctly file a report as a "sub", first select the type of report you wish to file. Prior to filing a sub-contractor report, you must know the following:

A.) The DUNS of the next higher tier
B.) The e-mail address of the person registered in eSRS of the next higher tier
C.) The Prime Contract Number
D.) The Sub Contract Number

For a general overview of filing a New Individual Subcontract Report, please see **Section 5.2** (p. 11) of this manual.

For a general overview of filing a New Individual Subcontract Report, please see **Section 6.2** (p. 13) of this manual.

I. Once you have begun filing your report (ISR or SSR) enter the contract number of the contract for which you wish to file.
II. Once you have entered the contract number, click Submit.
III. As a Subcontractor for this contract, you will now be forced to file as a "Sub". Notice that the selection "Prime" is unavailable.
IV. Enter the DUNS# and e-mail address of the next available tier contractor.
V. Enter the amount.
VI. Click Submit.
VII. You may now progress through the report submission process clicking "Save and Continue" after you have completed each step.
VIII. In order to completely submit the report, you must click "Submit" on step 8 (Designated on the left hand side of the screen) of the report submission process.

8. Year-End Supplementary Report for SDBs

8.1 View Existing

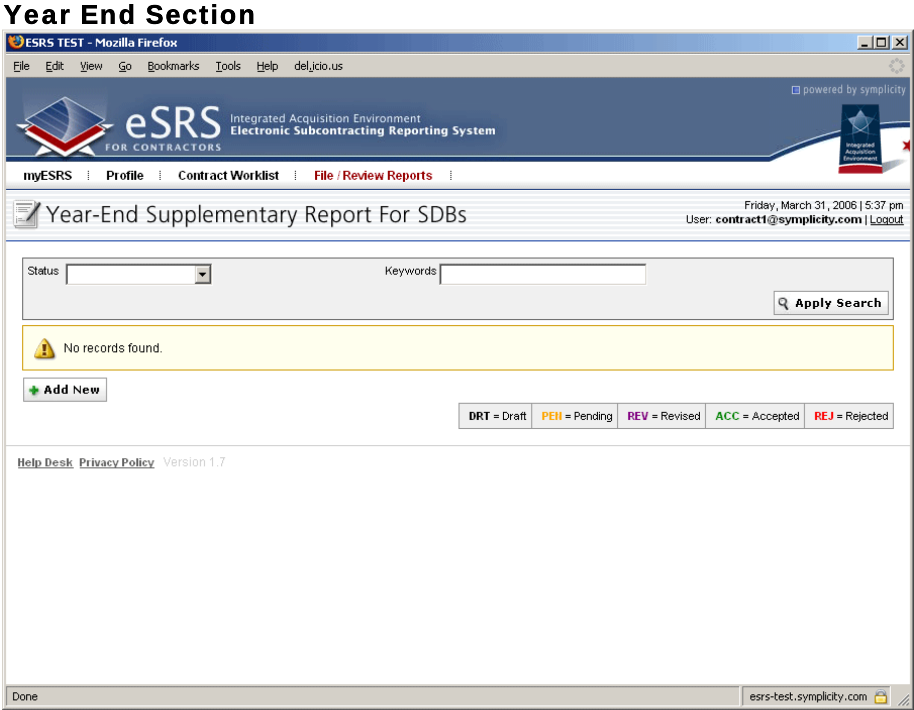
I. Click on “File / Review Reports” on the navigation bar.
II. Click on **Year-End Supplementary Report for SDBs** in the dropdown.
III. You will be directed to a screen similar to the “Year End Section” below.
IV. The status for each report is displayed in the status column.
Notice on the bottom of the page, a legend appears:

DRT = Draft	PEN = Pending	REV = Revised	ACC = Accepted	REJ = Rejected

Draft: You began working on a report, however did not complete it and/or submit it for approval.
Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.
Revised: The report has been revised by a government official.
Accepted: A government official has accepted your report.
Rejected: A government official has rejected your report.

V. To view the details of a submitted report, click on the View Icon beside the report.
VI. If the report has been rejected, you may click on the “Rejection Notes” tab to view the reason why the report has been rejected.
VII. To return to the report list, click the “Cancel” button at any time.

Year End Section

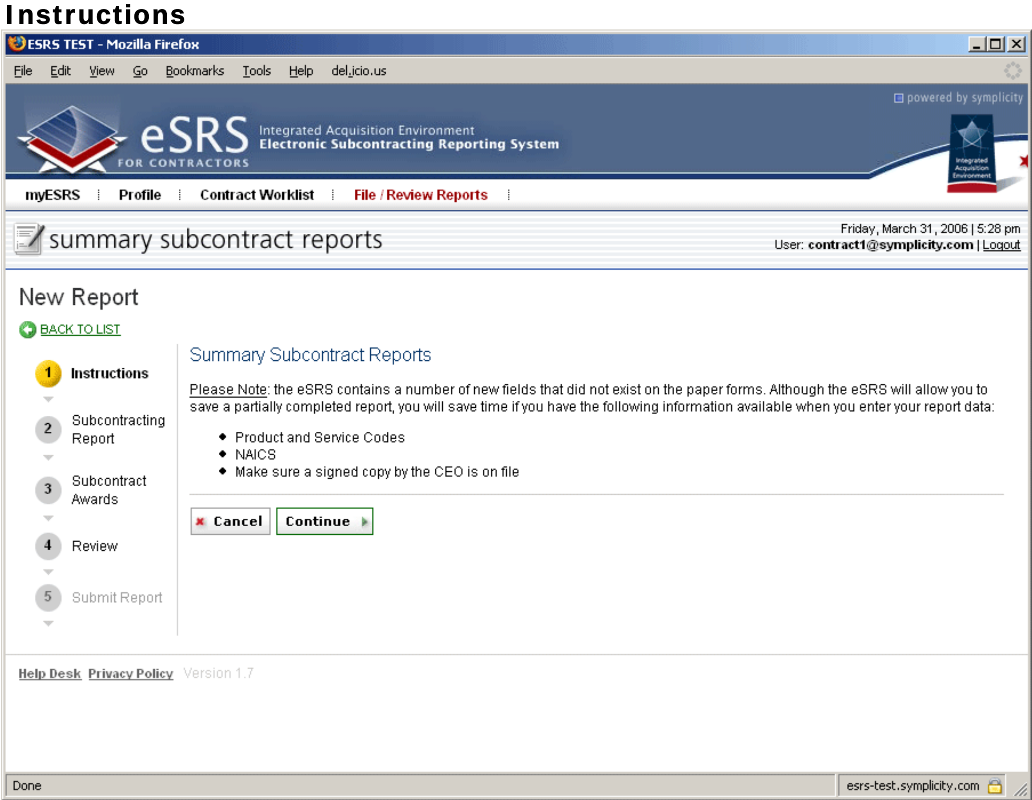


8.2 File New Year-End Supplementary Report

There are two different methods to file a Year End Supplementary Report. The first method allows you to easily file a new Year-End Supplementary Report from the "myESRS" homepage. Simply click on the "File Year End Supplementary Report" button (shown to right) or follow the method below.

I. Click on "File / Review Reports" on the navigation bar.
II. Click on "Year End Supplementary Reports for SDBs" on the drop down.
III. To file a new report, click on the Add New button.
IV. You will be taken to the instructions page similar to the screenshot below. Please take time to read the instructions.
V. Click on the Continue when ready.
VI. Select the Year-End Supplementary Report that the report should be associated with.
VII. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. (*Note, Click on the context sensitive* help *button beside the fields for more information*)
VIII. On step 4, click the Submit button to send the report.
IX. You may now return to view existing reports (Section 8.1, p. 16) to view the status of the report you just entered.

Instructions



9. SDB Participation Report (Form 312)

9.1 View Existing

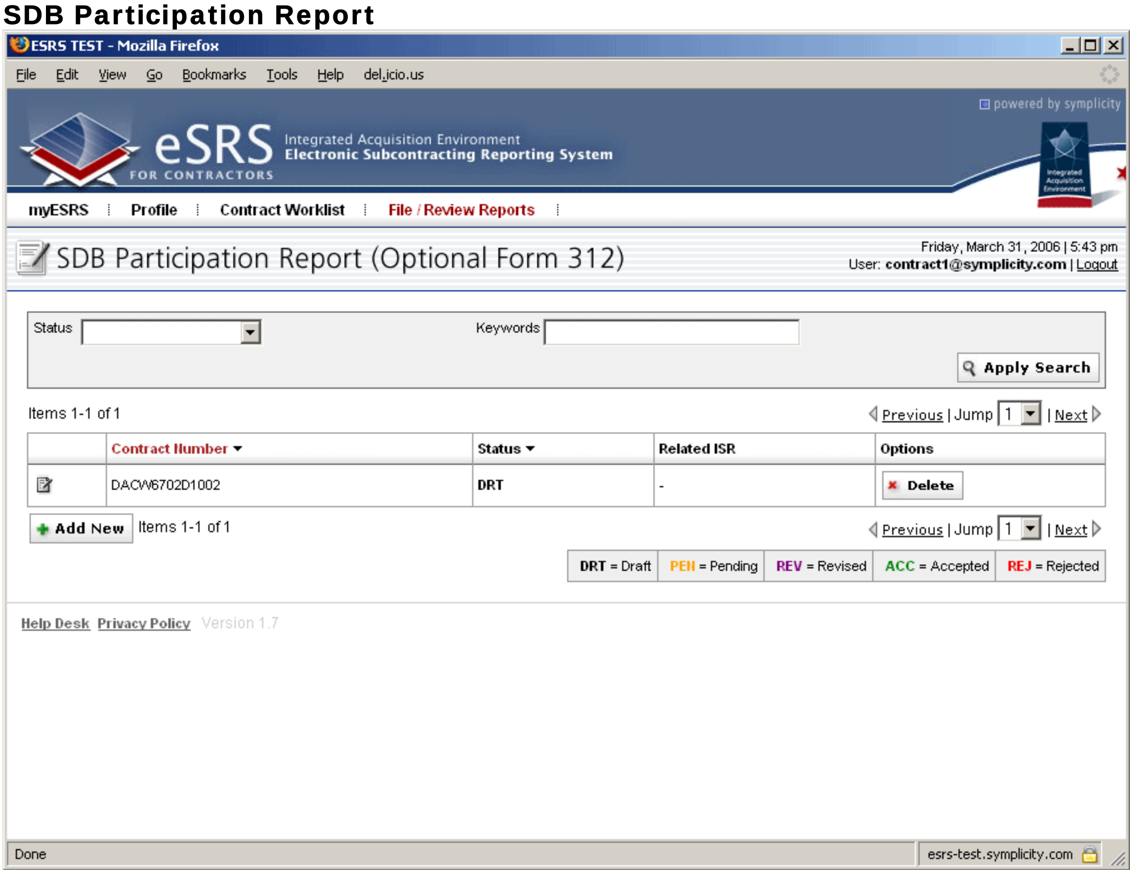
VIII. Click on “File / Review Reports” on the navigation bar.
IX. Click on **SDB Participation Report** in the dropdown.
X. You will be directed to a screen similar to the “**SDB Participation Report**” below.
XI. The status for each report is displayed in the status column. Notice on the bottom of the page, a legend appears:

DRT = Draft	PEN = Pending	REV = Revised	ACC = Accepted	REJ = Rejected

Draft: You began working on a report, however did not complete it and/or submit it for approval.
Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.
Revised: The report has been revised by a government official.
Accepted: A government official has accepted your report.
Rejected: A government official has rejected your report.

XII. To view the details of a submitted report, click on the View Icon beside the report.
XIII. If the report has been rejected, you may click on the “Rejection Notes” tab to view the reason why the report has been rejected.
XIV. To return to the report list, click the “Cancel” button at any time.

SDB Participation Report

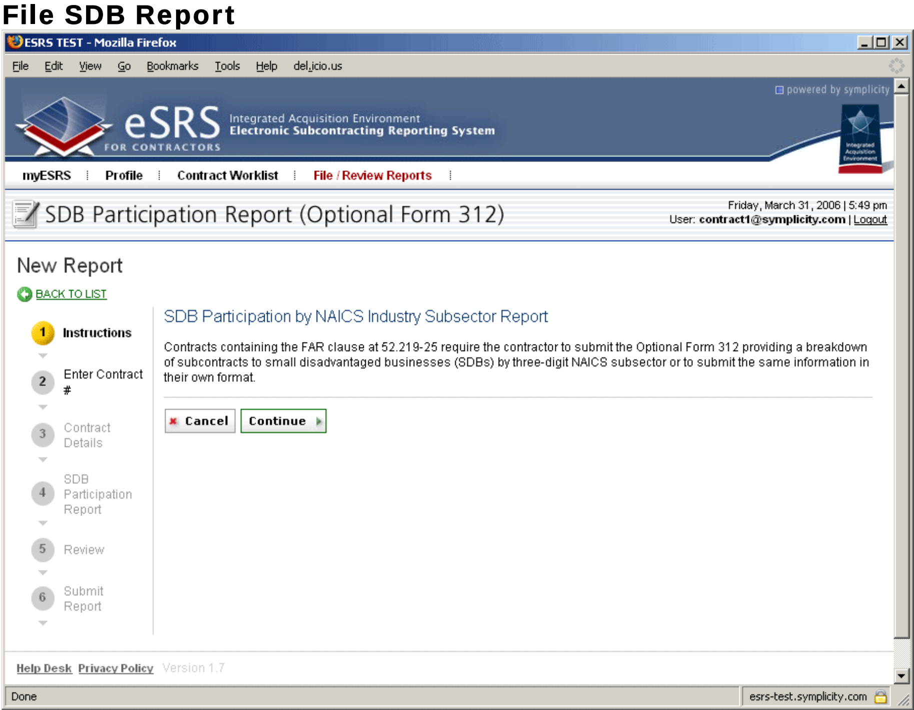


9.2 File New SDB Participation Report

There are two different methods to file an optional SDB Participation Report. The first method allows you to easily file a new SDB from the "myESRS" homepage. Simply click on the "File SDB Participation Report" button (shown to right) or follow the method below.

I. Click on "File / Review Reports" on the navigation bar.
II. Click on "SDB Participation Reports" on the drop down.
III. To file a new report, click on the **Add New** button.
IV. You will be taken to the instructions page similar to the screenshot below. Please take time to read the instructions.
V. Click on the **Continue** when ready.
VI. Select the SSR that the report should be associated with.
VII. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. (*Note, Click on the context sensitive* help *button beside the fields for more information*)
VIII. On step 4, click the Submit button to send the report.
IX. You may now return to view existing reports (Section 9.1, p. 18) to view the status of the report you just entered.

File SDB Report



10. Batch Upload

(For advanced users only)

The batch upload capability allows you to upload multiple reports (ISR / SSR) in one template.

I. First download the type of report template you wish to use for batch upload.
II. Modify the template in Microsoft Excel to include all contracts (ISR) or agencies (SSR) you wish to file for.
III. Save the excel spreadsheet in a CSV or Tab Delimited file, using the Save As feature in Excel.
IV. Place the file on a drive where you can access it later.
V. Enter the Batch Upload Section.
VI. Choose the Report Type (ISR / SSR)
VII. Choose the Delimiter
VIII. Click on Browse, and chose the file that you saved in Step III.
IX. The file will begin uploading, and will display the result of your upload on screen.

