

Electronic Subcontracting Reporting System (ESRS) Designated Government User Guide 1.7

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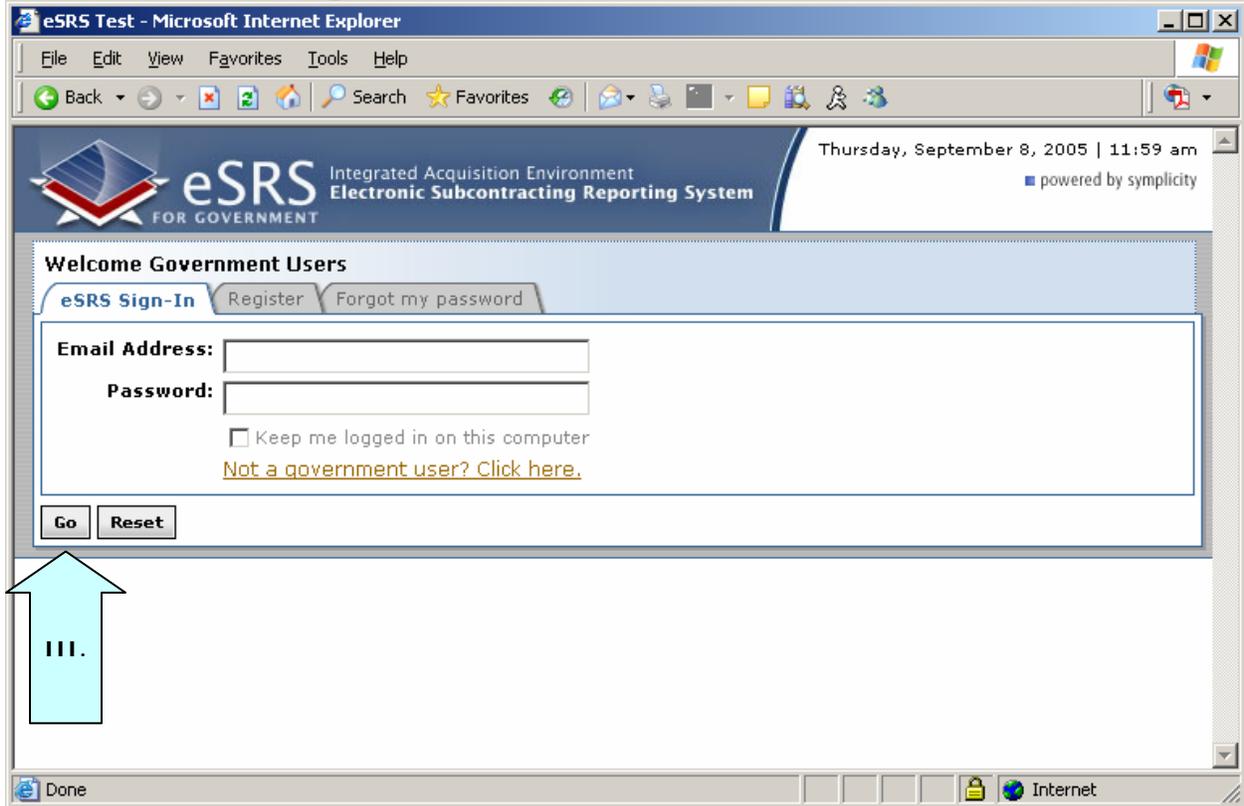
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1. Log-In to ESRS

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



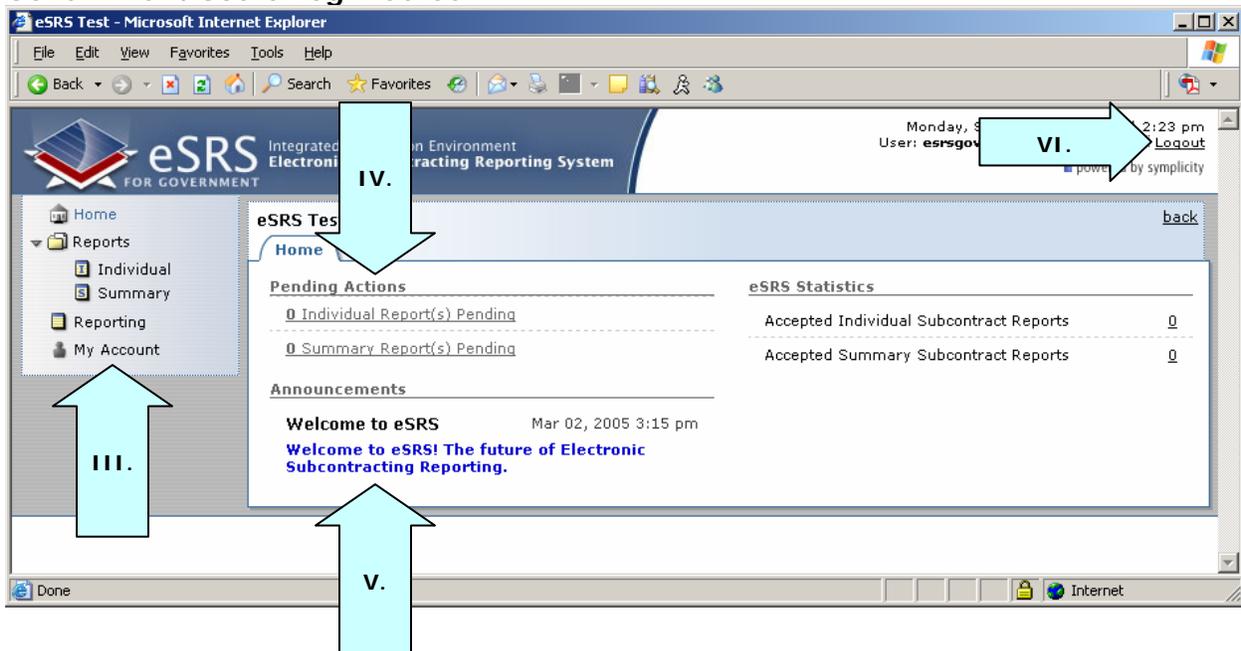
1.2 New Users

- 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.

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

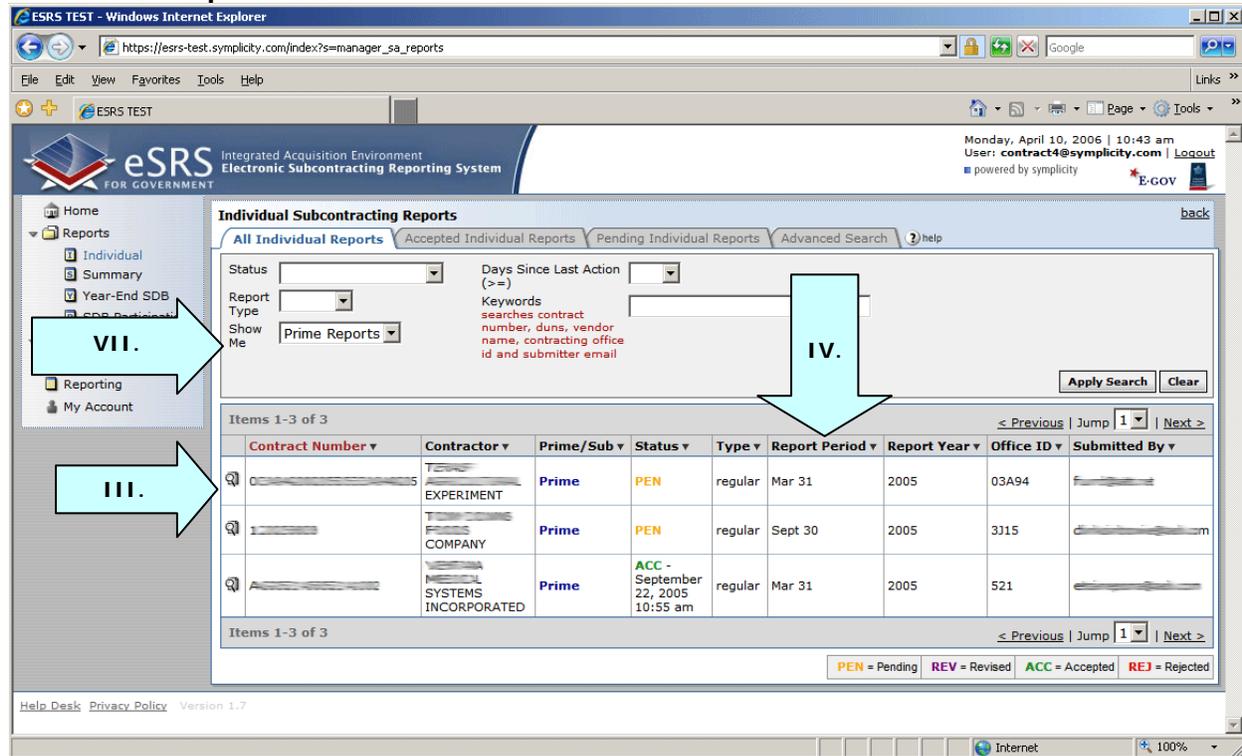


3. Reports

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

Individual Reports Screenshot



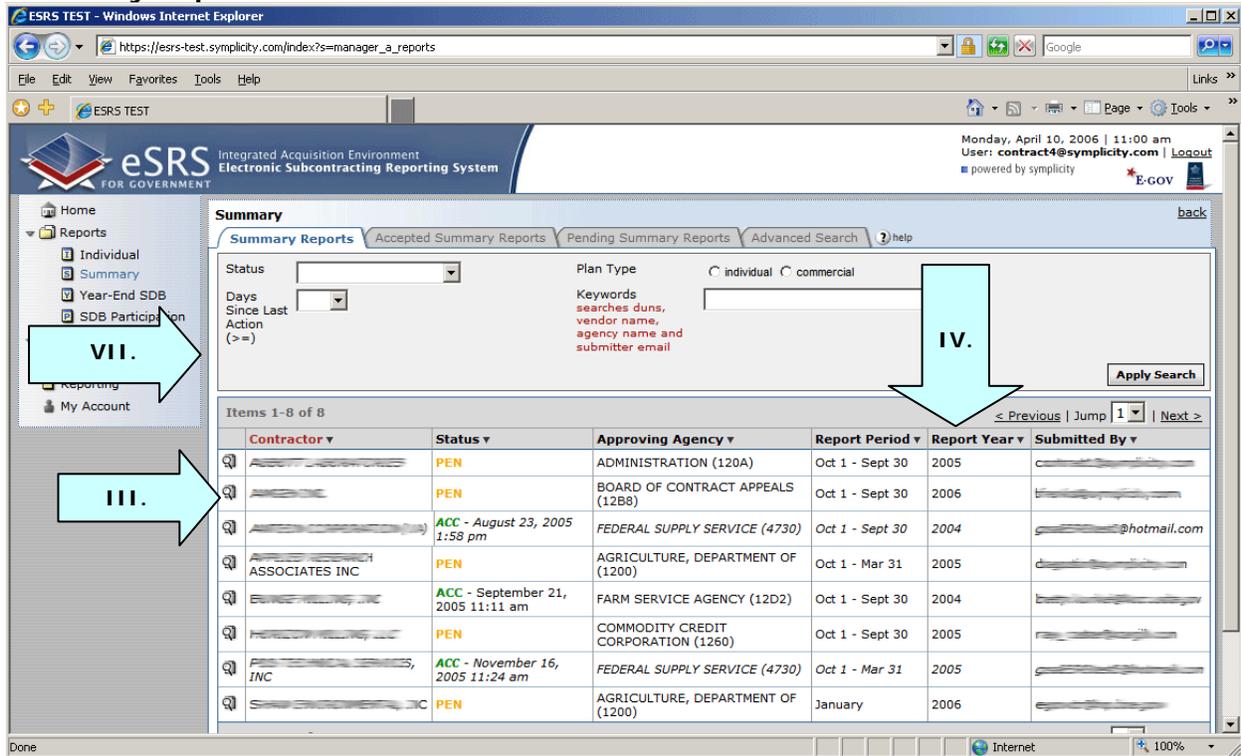
The screenshot displays the 'Individual Subcontracting Reports' interface. At the top, there are navigation tabs for 'All Individual Reports', 'Accepted Individual Reports', and 'Pending Individual Reports'. Below these are search filters including 'Status', 'Report Type', 'Show Me', 'Days Since Last Action', and 'Keywords'. A table lists three reports with columns for Contract Number, Contractor, Prime/Sub, Status, Type, Report Period, Report Year, Office ID, and Submitted By. The 'Contract Number' column header is highlighted in maroon. A legend at the bottom right defines status codes: PEN = Pending, REV = Revised, ACC = Accepted, and REJ = Rejected.

Contract Number	Contractor	Prime/Sub	Status	Type	Report Period	Report Year	Office ID	Submitted By
[REDACTED]	EXPERIMENT	Prime	PEN	regular	Mar 31	2005	03A94	[REDACTED]
[REDACTED]	COMPANY	Prime	PEN	regular	Sept 30	2005	3315	[REDACTED]
[REDACTED]	SYSTEMS INCORPORATED	Prime	ACC - September 22, 2005 10:55 am	regular	Mar 31	2005	521	[REDACTED]

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.
- VII. Choose the Search Criteria to limit the results.

Summary Reports Screenshot



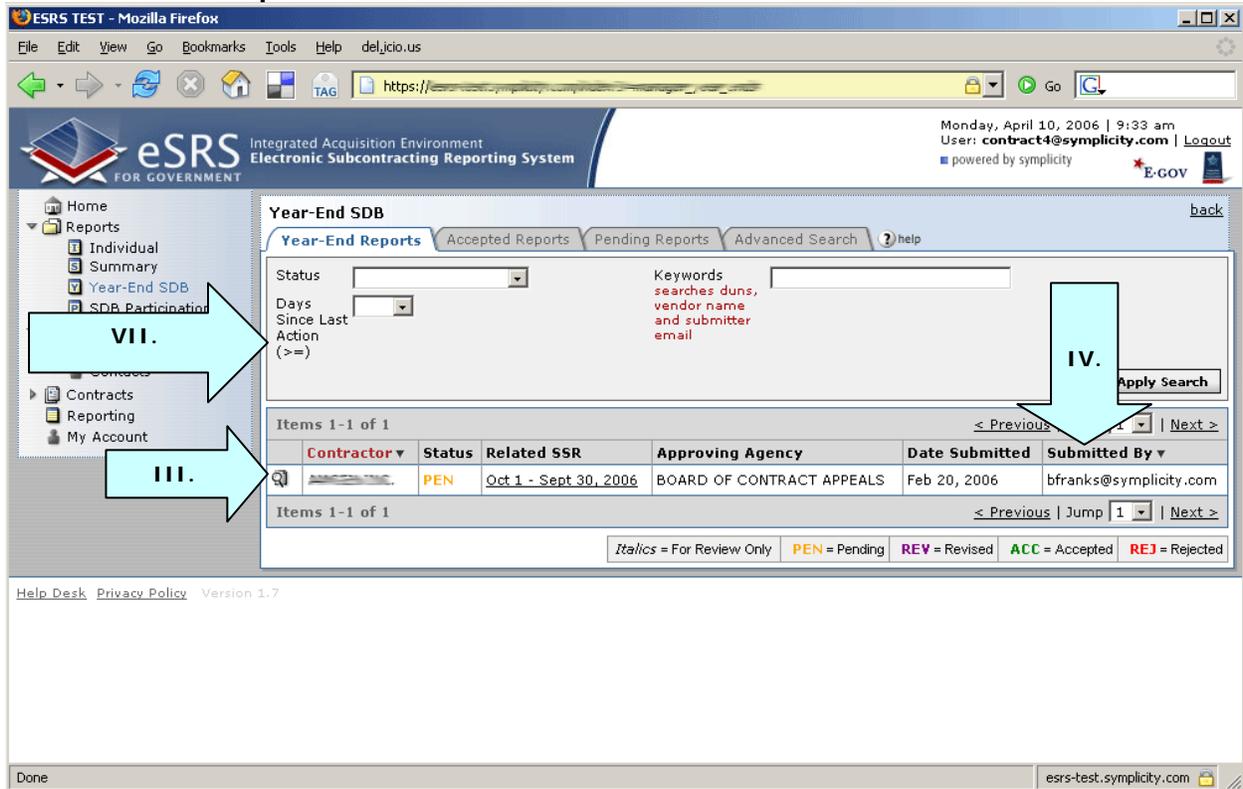
The screenshot shows the ESRS Summary Reports page. The navigation menu on the left includes Home, Reports, Individual, Summary, Year-End SDB, SDB Participation, Reporting, and My Account. The main content area has tabs for Summary Reports, Accepted Summary Reports, Pending Summary Reports, and Advanced Search. Search criteria include Status, Plan Type (individual/commercial), Days Since Last Action, and Keywords. A table displays 8 items with columns for Contractor, Status, Approving Agency, Report Period, Report Year, and Submitted By. Three callout boxes with arrows point to specific features: VII points to the search criteria, III points to the view icon in the table, and IV points to a column header in the table.

Contractor ▼	Status ▼	Approving Agency ▼	Report Period ▼	Report Year ▼	Submitted By ▼
██████████	PEN	ADMINISTRATION (120A)	Oct 1 - Sept 30	2005	██████████
██████████	PEN	BOARD OF CONTRACT APPEALS (12B8)	Oct 1 - Sept 30	2006	██████████
██████████	ACC - August 23, 2005 1:58 pm	FEDERAL SUPPLY SERVICE (4730)	Oct 1 - Sept 30	2004	██████████@hotmail.com
ASSOCIATES INC	PEN	AGRICULTURE, DEPARTMENT OF (1200)	Oct 1 - Mar 31	2005	██████████
██████████	ACC - September 21, 2005 11:11 am	FARM SERVICE AGENCY (12D2)	Oct 1 - Sept 30	2004	██████████
██████████	PEN	COMMODITY CREDIT CORPORATION (1260)	Oct 1 - Sept 30	2005	██████████
██████████, INC	ACC - November 16, 2005 11:24 am	FEDERAL SUPPLY SERVICE (4730)	Oct 1 - Mar 31	2005	██████████
██████████	PEN	AGRICULTURE, DEPARTMENT OF (1200)	January	2006	██████████

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.
- VII. Choose the Filter Criteria to limit the list of results.

Year-End SDB Reports Screenshot



The screenshot displays the eSRS Year-End SDB Reports interface. The browser window shows the URL <https://esrs-test.symplicity.com>. The page header identifies the system as the 'Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR GOVERNMENT'. The user is logged in as 'contract4@symplicity.com' on Monday, April 10, 2006, at 9:33 am. The main content area is titled 'Year-End SDB' and features several tabs: 'Year-End Reports', 'Accepted Reports', 'Pending Reports', and 'Advanced Search'. There are search filters for 'Status', 'Days Since Last Action (>=)', and 'Keywords' (which searches for 'duns, vendor name and submitter email'). A table displays one report with the following details:

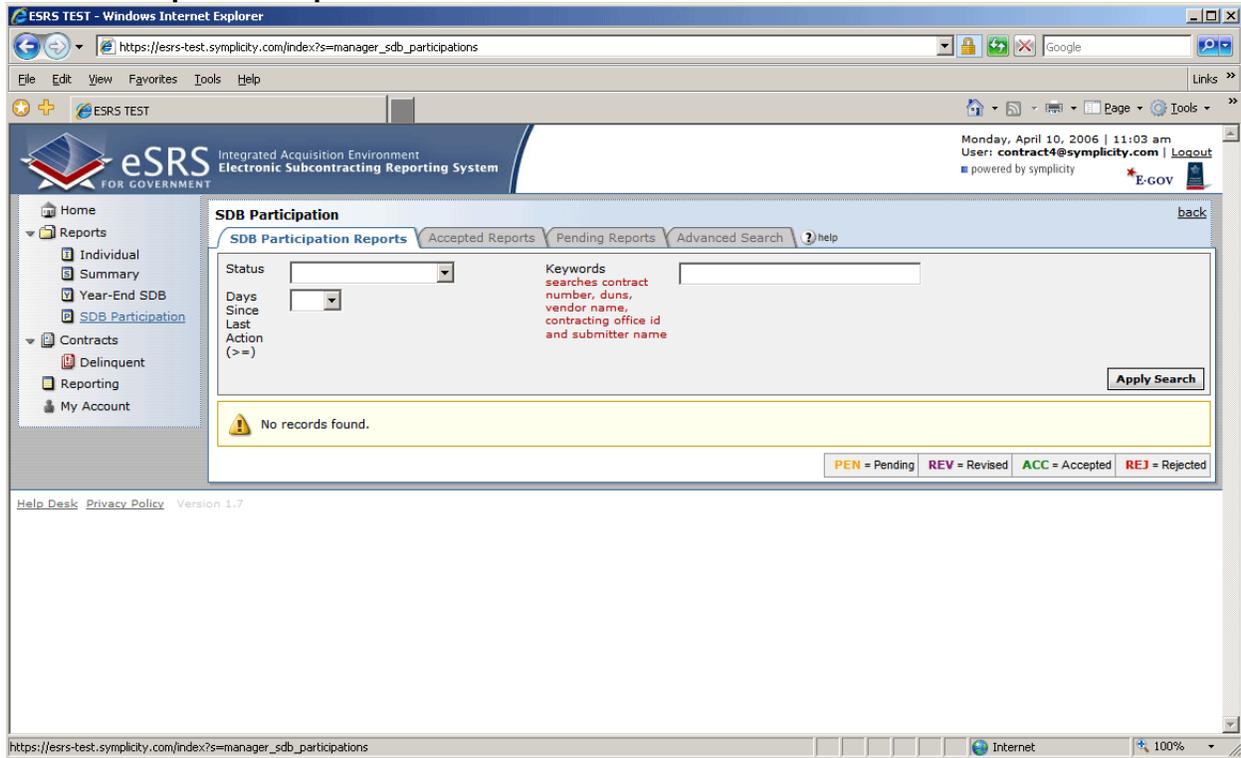
Contractor	Status	Related SSR	Approving Agency	Date Submitted	Submitted By
	PEN	Oct 1 - Sept 30, 2006	BOARD OF CONTRACT APPEALS	Feb 20, 2006	bfranks@symplicity.com

Below the table is a legend: *Italics* = For Review Only, **PEN** = Pending, **REV** = Revised, **ACC** = Accepted, **REJ** = Rejected. The left navigation menu includes 'Home', 'Reports' (with sub-items: Individual, Summary, Year-End SDB, SDB Participation), 'Contracts', 'Reporting', and 'My Account'. Three red arrows point to specific elements: Arrow III points to the 'View' icon in the table; Arrow IV points to the 'Contractor' column header; Arrow VII points to the 'Year-End SDB' link in the left navigation menu.

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

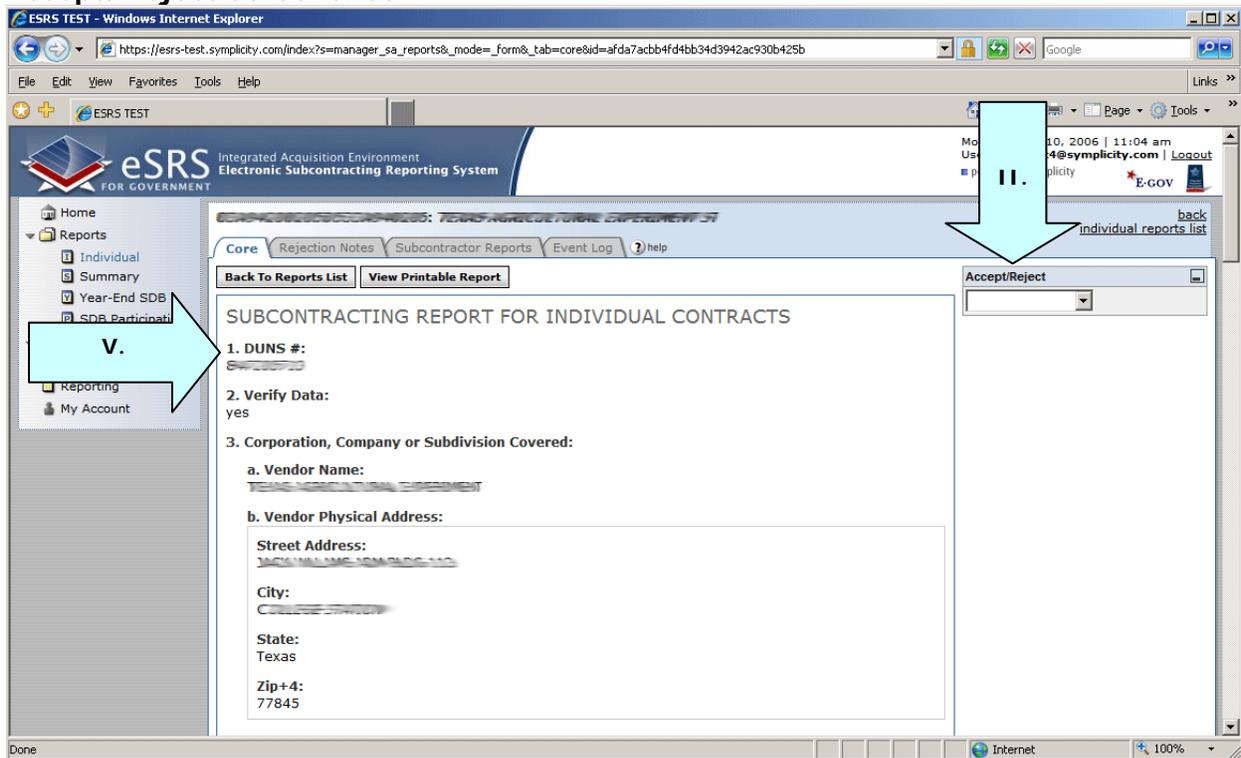


3.5 Accept / Reject

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 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.
- V. The data will appear to the right. You may also use the buttons along the top, to view a print preview or return to the reports list.

Accept/Reject Screenshot



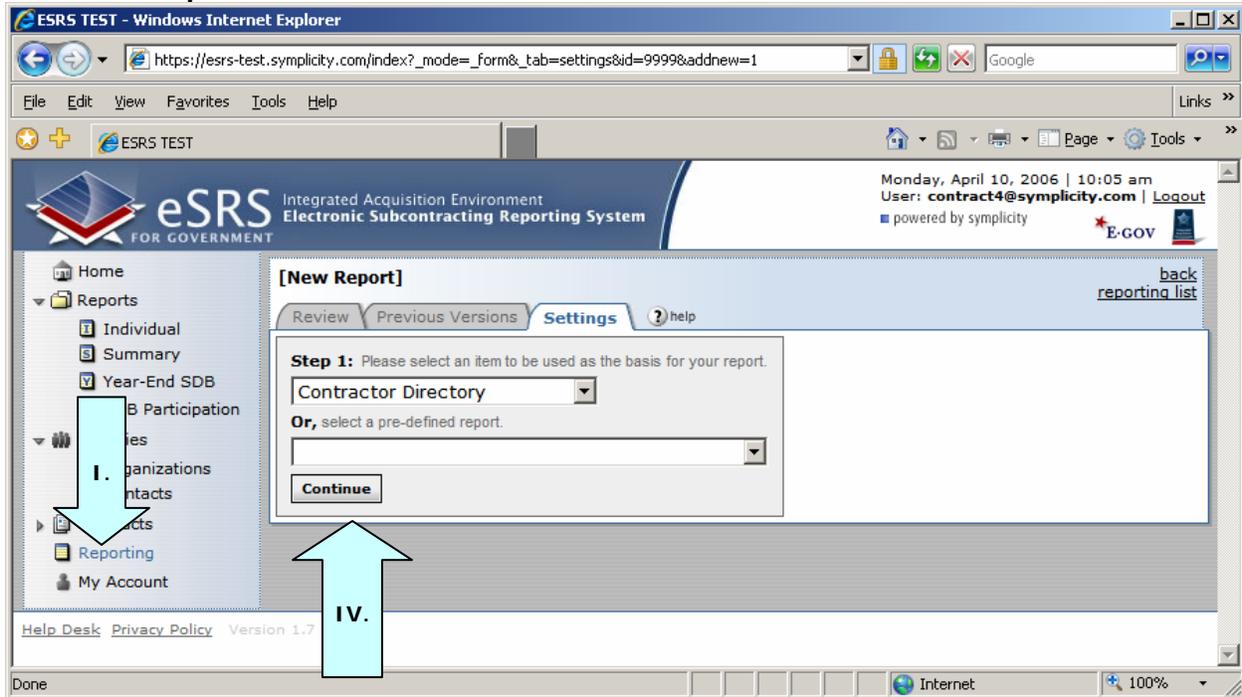
The screenshot shows the ESRS web application interface. The browser title is "ESRS TEST - Windows Internet Explorer". The address bar shows the URL: https://esrs-test.symplicity.com/index?s=manager_sa_reports&mode=_form&tab=core&id=afda7acbb4fd4bb34d3942ac930b425b. The page header includes the ESRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR GOVERNMENT". The navigation menu on the left includes "Home", "Reports" (with sub-items: Individual, Summary, Year-End SDB, SDB Participant), "Reporting", and "My Account". The main content area shows a "SUBCONTRACTING REPORT FOR INDIVIDUAL CONTRACTS" form. The form has tabs for "Core", "Rejection Notes", "Subcontractor Reports", and "Event Log". Below the tabs are buttons for "Back To Reports List" and "View Printable Report". The form fields include: "1. DUNS #:", "2. Verify Data: yes", "3. Corporation, Company or Subdivision Covered:" with sub-fields for "a. Vendor Name:", "b. Vendor Physical Address:" (with sub-fields for Street Address, City, State, and Zip+4). A red arrow labeled "V." points to the "My Account" link in the navigation menu. A red arrow labeled "II." points to the "Accept/Reject" dropdown menu on the right side of the form.

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 & return 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

Home
Reports
Individual
Summary
Year-End SDB
SDB Participation
Reporting
My Account

[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

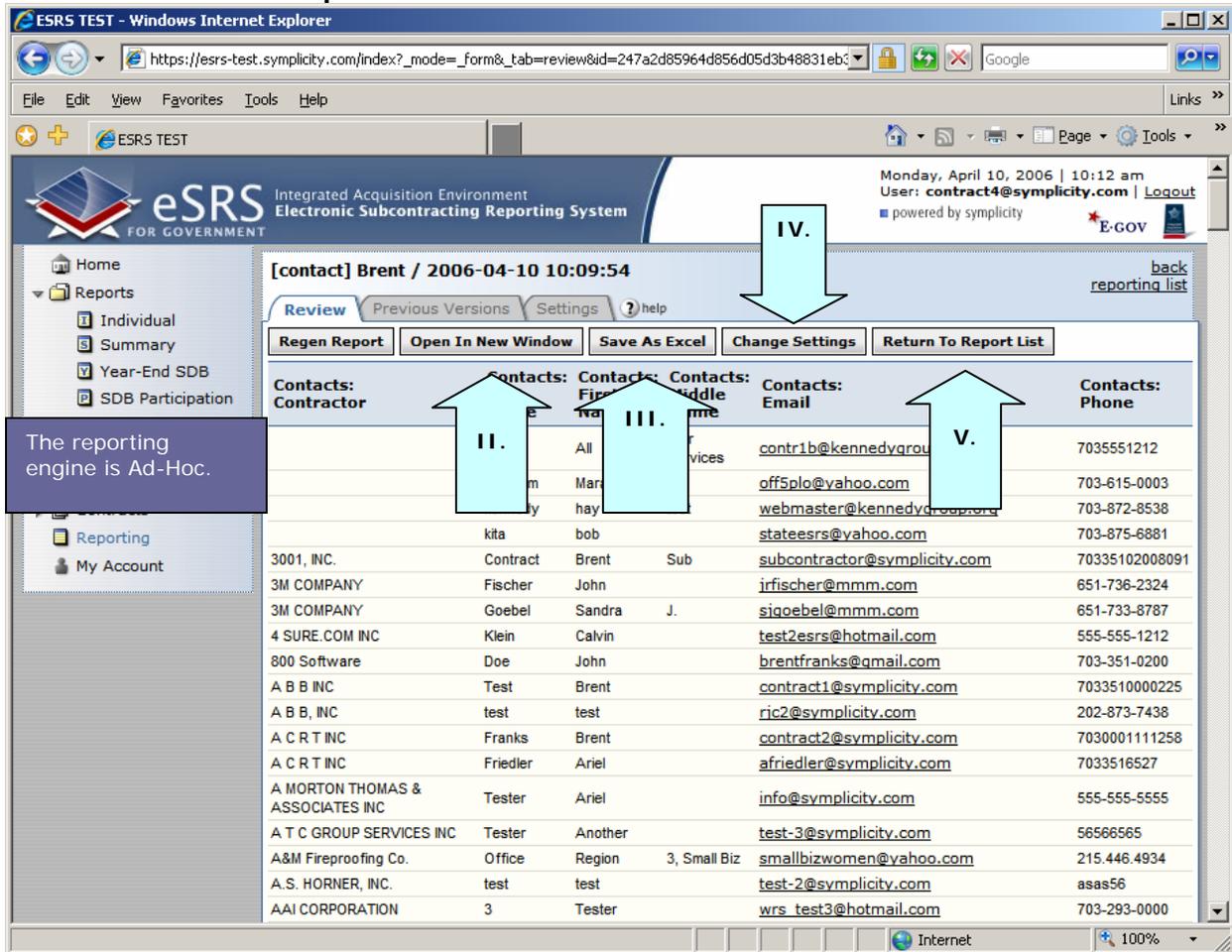
- Contractor
- Last Name
- First Name
- Middle Name
- Email
- Phone
- Fax
- Cell Phone
- Supervisor Name
- Supervisor Email
- SBA Region filter
- SBA Cont filter

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 reporting engine is Ad-Hoc.

Monday, April 10, 2006 | 10:12 am
User: **contract4@simplicity.com** | Logout
powered by simplicity E-GOV

[contact] Brent / 2006-04-10 10:09:54 [back reporting list](#)

Review Previous Versions Settings ? help

Regen Report Open In New Window Save As Excel Change Settings Return To Report List

Contacts: Contractor	Contacts: Firm Name	Contacts: Middle Name	Contacts: Email	Contacts: Phone	
	All		contr1b@kennedygrou	7035551212	
	Mar		off5plo@yahoo.com	703-615-0003	
	hay		webmaster@kennedygrou	703-872-8538	
	kita		stateesrs@yahoo.com	703-875-6881	
3001, INC.	Contract	Brent	Sub	subcontractor@symplicity.com	70335102008091
3M COMPANY	Fischer	John		irfischer@mmm.com	651-736-2324
3M COMPANY	Goebel	Sandra	J.	sjgoebel@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

ESRS TEST - Windows Internet Explorer

https://esrs-test.simplicity.com/index?s=reporting

Monday, April 10, 2006 | 11:08 am
 User: contract4@simplicity.com | Logout
 powered by simplicity E-GOV

Home
 Reports
 Individual
 Summary
 Reporting
 My Account

Reporting [back](#)

Saved Reports [? help](#)

Class
 Status

Keywords
Searches label and description.

Items 1-1 of 1 Jump

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

Add Jump

Help Desk Privacy Policy Version 1.0

Done Internet 100%

5. My Account

5.1 General Information

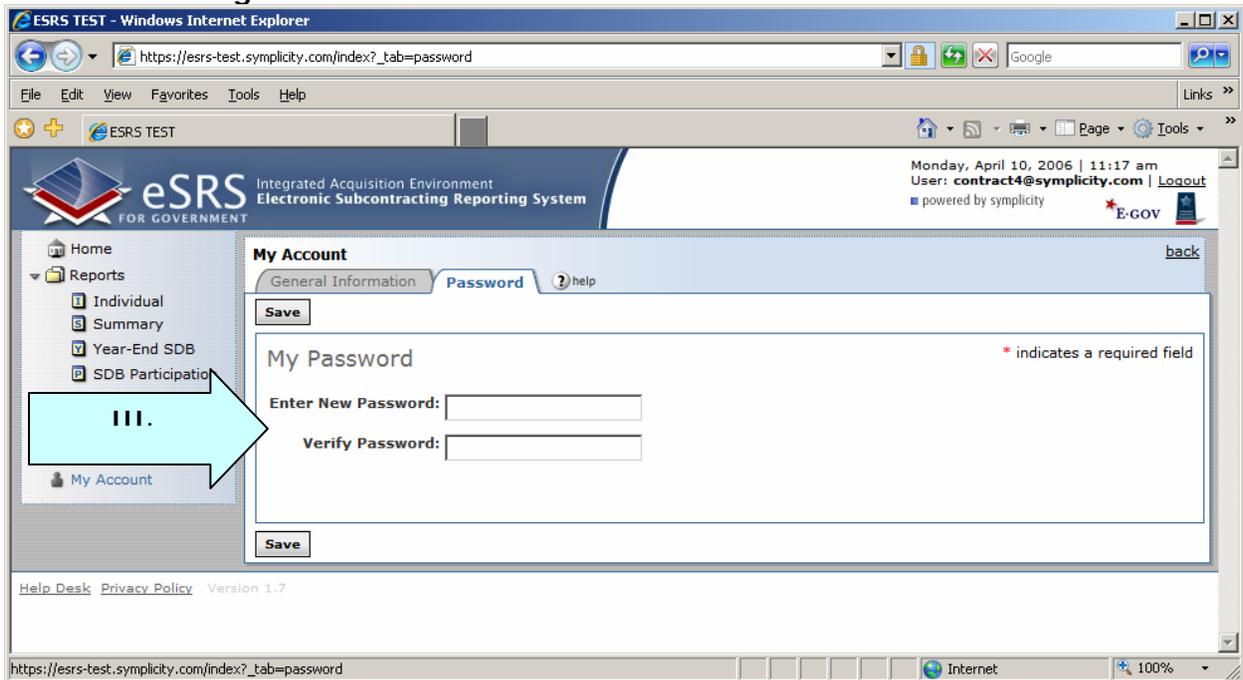
My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

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

5.2 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



ESRS TEST - Windows Internet Explorer

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

File Edit View Favorites Tools Help

ESRS TEST

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

Home
 Reports
 Individual
 Summary
 Year-End SDB
 SDB Participatio
 My Account

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