

# **Electronic Subcontracting Reporting System (ESRS) Designated Government 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 FOR GOVERNMENT" and the subtitle is "Integrated Acquisition 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

At the top right of the page, the user information is displayed: "Sunday, 12:29 pm" and "Logout". A "Logout" link is visible next to the user information.

Annotations on the screenshot:

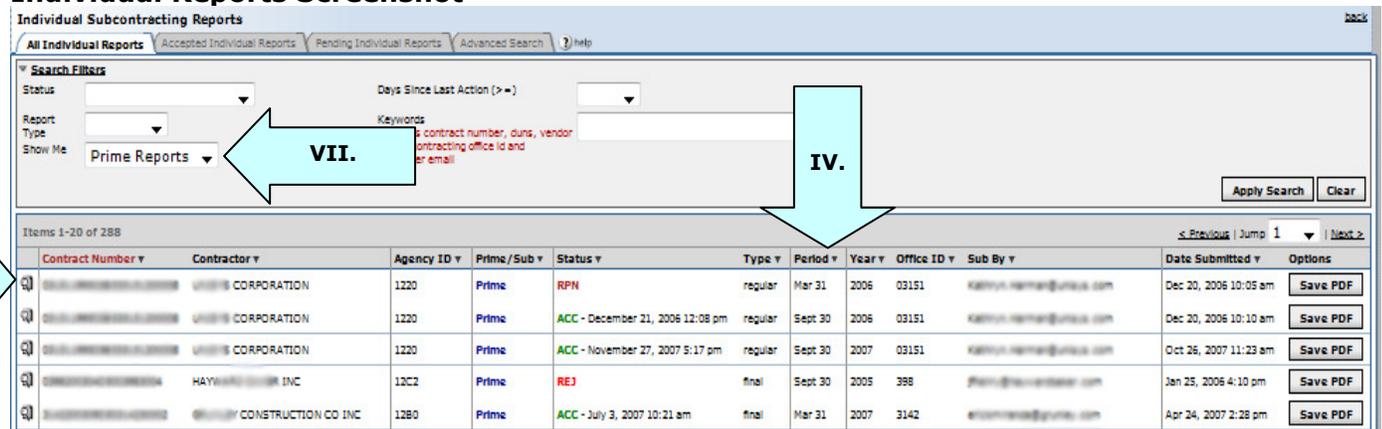
- III. Points to the navigation menu on the left.
- IV. Points to the "Pending Actions" section.
- V. Points to the "Logout" link.

### 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



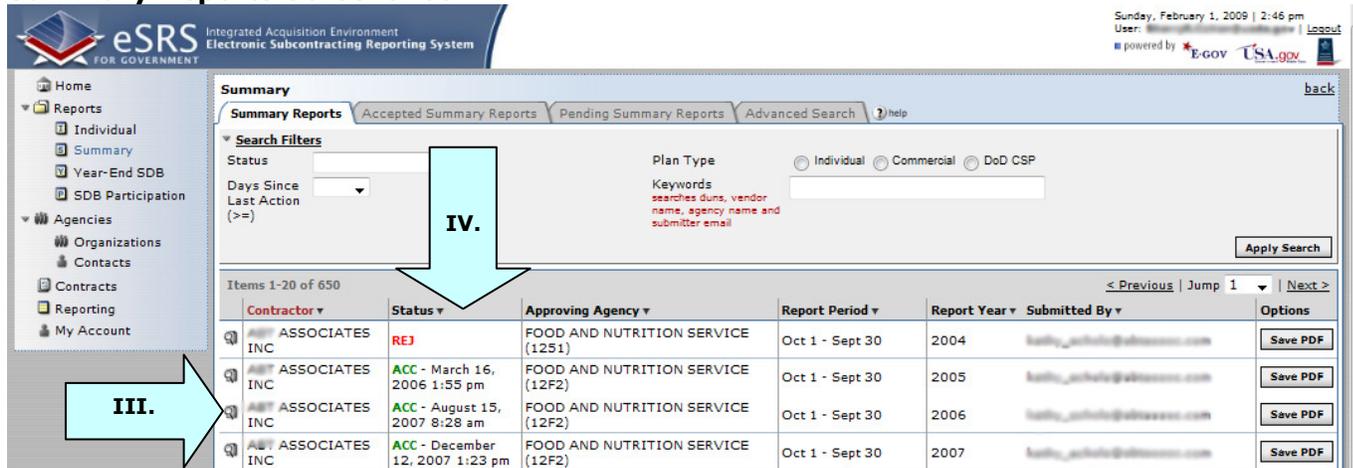
The screenshot shows the 'Individual Subcontracting Reports' page. At the top, there are tabs for 'All Individual Reports', 'Accepted Individual Reports', 'Pending Individual Reports', and 'Advanced Search'. Below the tabs is a search filter section with fields for Status, Report Type, Show Me (set to 'Prime Reports'), Days Since Last Action, and Keywords. A table of reports is displayed below, with columns for Contract Number, Contractor, Agency ID, Prime/Sub, Status, Type, Period, Year, Office ID, Sub By, Date Submitted, and Options. Three callout boxes are present: 'III.' points to the 'View Icon' in the first column of the first row; 'IV.' points to the 'Status' column header; 'VII.' points to the 'Show Me' dropdown menu.

Contract Number	Contractor	Agency ID	Prime/Sub	Status	Type	Period	Year	Office ID	Sub By	Date Submitted	Options
00000000000000000000	UNITED CORPORATION	1220	Prime	RPN	regular	Mar 31	2006	03151	kabru.naman@unus.com	Dec 20, 2006 10:05 am	Save PDF
00000000000000000000	UNITED CORPORATION	1220	Prime	ACC - December 21, 2006 12:08 pm	regular	Sept 30	2006	03151	kabru.naman@unus.com	Dec 20, 2006 10:10 am	Save PDF
00000000000000000000	UNITED CORPORATION	1220	Prime	ACC - November 27, 2007 5:17 pm	regular	Sept 30	2007	03151	kabru.naman@unus.com	Oct 26, 2007 11:23 am	Save PDF
00000000000000000000	HAYWARD GROUP INC	12C2	Prime	REJ	final	Sept 30	2005	398	zhen@haywardgroup.com	Jan 25, 2006 4:10 pm	Save PDF
00000000000000000000	CONSTRUCTION CO INC	1280	Prime	ACC - July 3, 2007 10:21 am	final	Mar 31	2007	3142	elcomrade@unus.com	Apr 24, 2007 2:28 pm	Save PDF

### 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



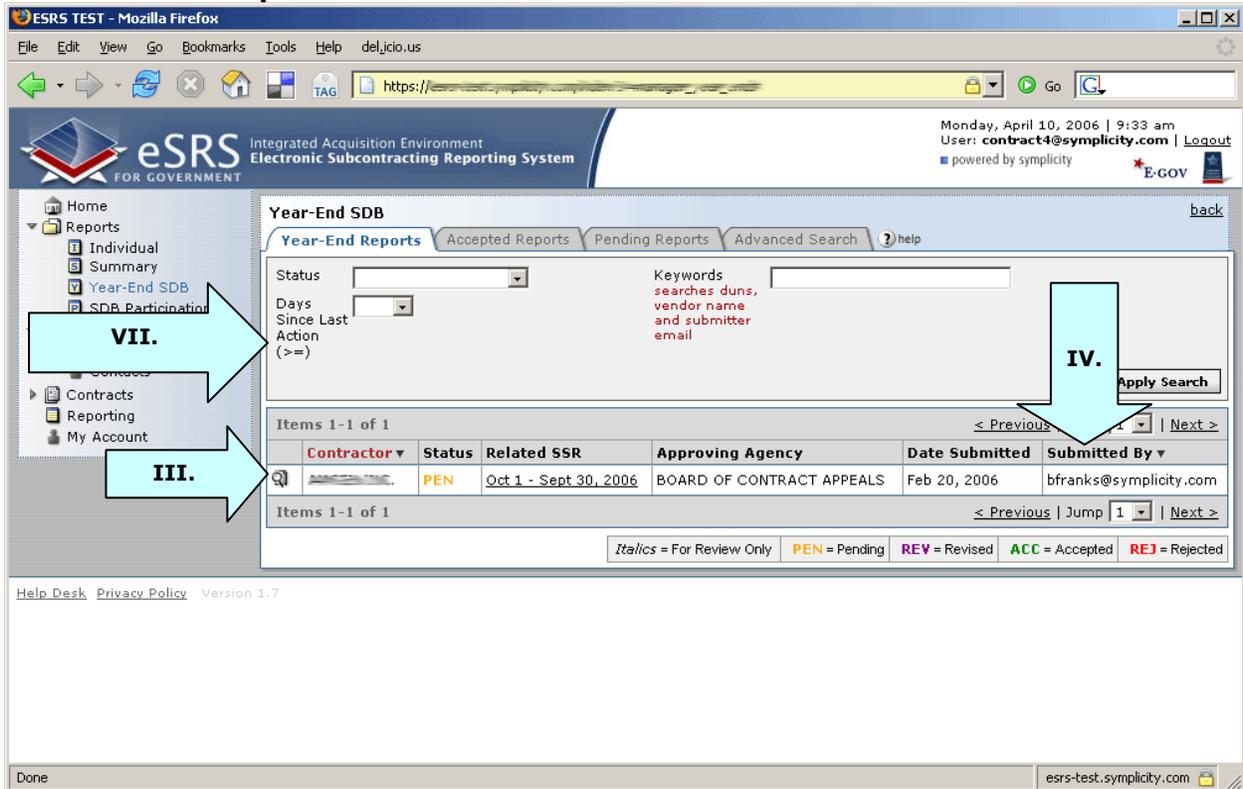
The screenshot shows the eSRS Summary Reports page. The left navigation menu has 'Reports' expanded to 'Summary'. The search filters section includes 'Status', 'Days Since Last Action', 'Plan Type' (Individual, Commercial, DoD CSP), and 'Keywords'. The table below shows a list of reports with columns for Contractor, Status, Approving Agency, Report Period, Report Year, Submitted By, and Options. The 'Status' column header is highlighted in maroon, and the 'View Icon' in the first row is highlighted with a red arrow labeled 'III.'. 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_p@hhs.gov	Save PDF
AMT ASSOCIATES INC	ACC - March 16, 2006 1:55 pm	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2005	hally_p@hhs.gov	Save PDF
AMT ASSOCIATES INC	ACC - August 15, 2007 8:28 am	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2006	hally_p@hhs.gov	Save PDF
AMT ASSOCIATES INC	ACC - December 12, 2007 1:23 pm	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2007	hally_p@hhs.gov	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.
- VII. Choose the Filter Criteria to limit the list of results.

#### Year-End SDB Reports Screenshot



The screenshot shows the eSRS (Integrated Acquisition Environment Electronic Subcontracting Reporting System) interface. The browser window is titled "ESRS TEST - Mozilla Firefox". The page header includes the date "Monday, April 10, 2006 | 9:33 am" and the user "contract4@symplicity.com".

The main content area is titled "Year-End SDB" and contains several tabs: "Year-End Reports", "Accepted Reports", "Pending Reports", and "Advanced Search". Below the tabs are search filters for "Status", "Days Since Last Action (>=)", and "Keywords" (which searches for duns, vendor name, and submitter email). An "Apply Search" button is located to the right of the filters.

The table below the filters displays one report. The table has columns for Contractor, Status, Related SSR, Approving Agency, Date Submitted, and Submitted By. The "Contractor" column is highlighted in maroon, indicating it is the active sort column.

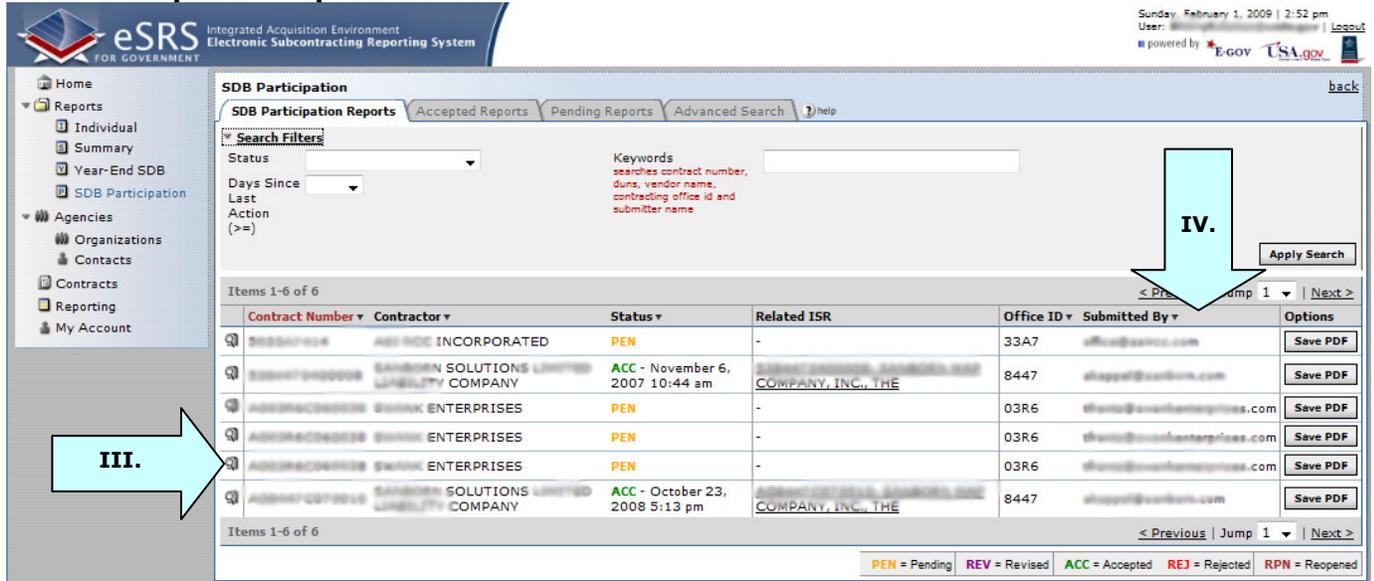
Contractor	Status	Related SSR	Approving Agency	Date Submitted	Submitted By
	PEN	Oct 1 - Sept 30, 2006	BOARD OF CONTRACT APPEALS	Feb 20, 2006	bfranks@symplicity.com

At the bottom of the table, there are navigation links: "< Previous", "Jump 1", and "Next >". A legend at the bottom of the page defines the status codes: *Italics* = For Review Only, PEN = Pending, REV = Revised, ACC = Accepted, REJ = Rejected.

### 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



The screenshot displays the eSRS (Integrated Acquisition Environment Electronic Subcontracting Reporting System) interface. The main content area is titled "SDB Participation" and includes tabs for "SDB Participation Reports", "Accepted Reports", "Pending Reports", and "Advanced Search". A search filter section is visible with fields for Status, Days Since, Last Action, and Keywords. Below the search filters is a table of reports with columns for Contract Number, Contractor, Status, Related ISR, Office ID, Submitted By, and Options. A legend at the bottom indicates status colors: PEN (Pending), REV (Revised), ACC (Accepted), REJ (Rejected), and RPN (Reopened).

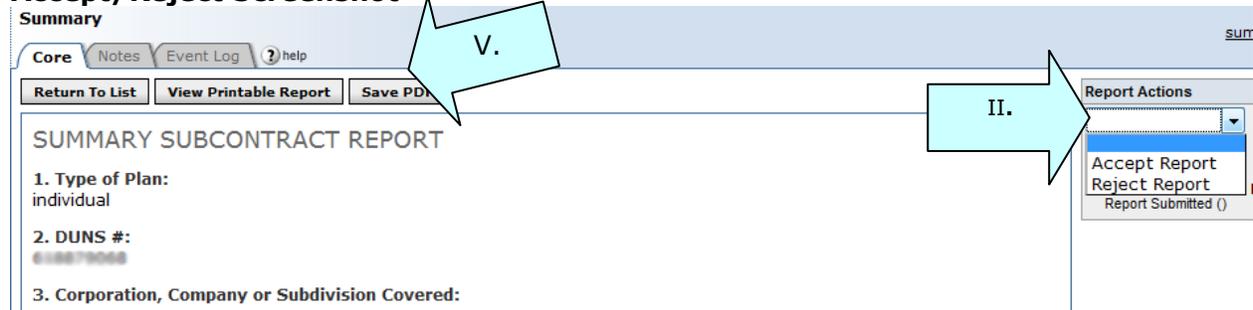
Contract Number	Contractor	Status	Related ISR	Office ID	Submitted By	Options
503530704	ADTRIC INCORPORATED	PEN	-	33A7	af@adtric.com	Save PDF
50353070008	SANBORN SOLUTIONS LIMITED LIABILITY COMPANY	ACC - November 6, 2007 10:44 am	50353070008 SANBORN SOLUTIONS LIMITED LIABILITY COMPANY, INC., THE	8447	slapp@sanborn.com	Save PDF
50353070038	SWANK ENTERPRISES	PEN	-	03R6	l@swankenterprises.com	Save PDF
50353070038	SWANK ENTERPRISES	PEN	-	03R6	l@swankenterprises.com	Save PDF
50353070038	SWANK ENTERPRISES	PEN	-	03R6	l@swankenterprises.com	Save PDF
50353070038	SANBORN SOLUTIONS LIMITED LIABILITY COMPANY	ACC - October 23, 2008 5:13 pm	50353070038 SANBORN SOLUTIONS LIMITED LIABILITY COMPANY, INC., THE	8447	slapp@sanborn.com	Save PDF

### 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

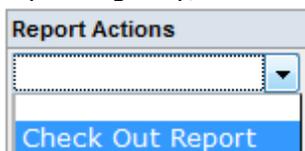


### 3.6 Accept / Reject (Administering Agency Designated on Report)

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.

**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.

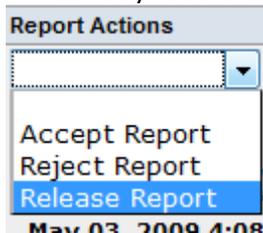
Core | Notes | Subcontractor Reports | Event Log | ? help

 **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.

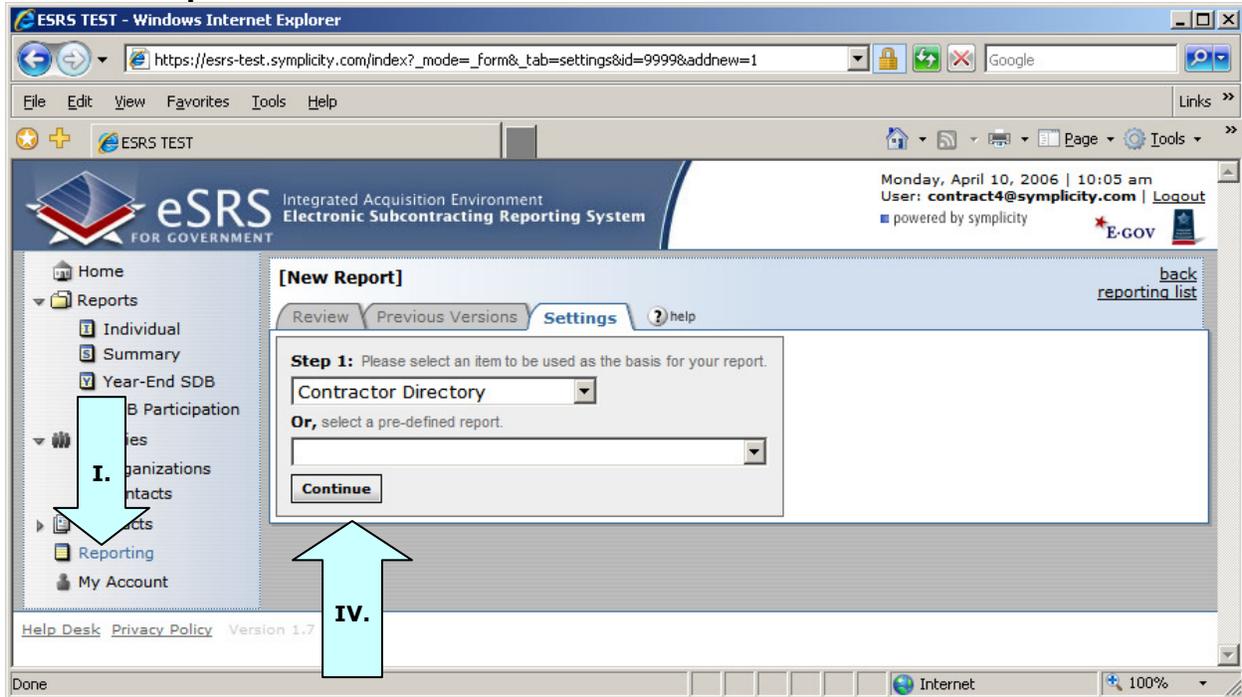
Report Rights	
Contracting Office Agency	AIR FORCE RESEARCH LABORATORY (AFRL) - GS03
Admin Agency	AFMC (AFMC) - FA8104

## 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

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

**eSRS** Integrated Acquisition Environment  
FOR GOVERNMENT Electronic Subcontracting Reporting System

Home  
Reports  
Individual  
Summary  
Year-End SDB  
Organizations  
Contacts  
Contracts  
Reporting  
My Account

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

Review Previous Versions **Settings** help

Save as: [contact] Brent / 2006-04-10 10:09:54  
Description:

**Max. on-screen results:** 500  
(enter zero to display all rows)

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

Base Class: **Contacts**  Count

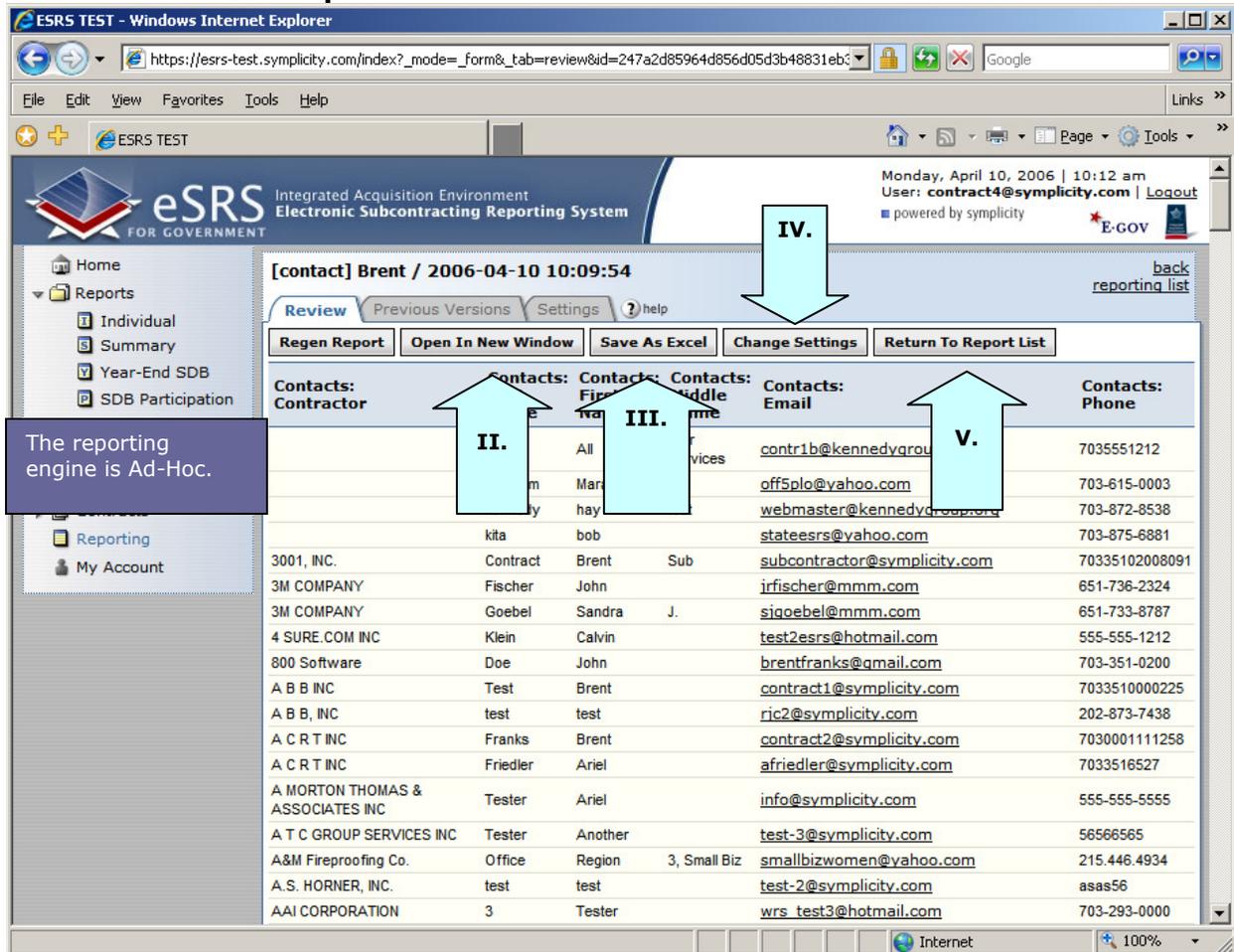
- Contractor
- Last Name
- First Name
- Middle Name
- Email
- Phone
- Fax
- Cell Phone
- Supervisor Name
- Supervisor Email
- SBA Region filter
- SBA Cont filter

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



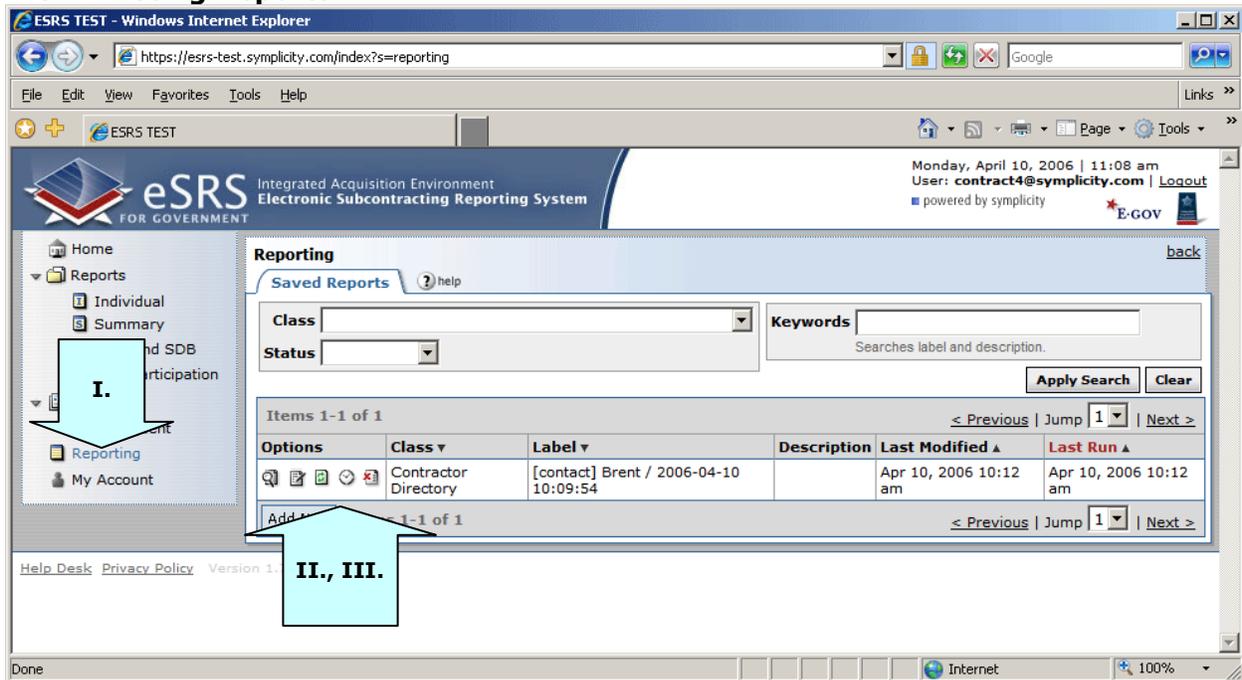
The screenshot shows the ESRS TEST web application interface. At the top, there is a navigation bar with the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR GOVERNMENT". The user is logged in as "contract4@simplicity.com" on Monday, April 10, 2006, at 10:12 am. The main content area displays a report titled "[contact] Brent / 2006-04-10 10:09:54". Below the title, there are several tabs: "Review", "Previous Versions", "Settings", and "? help". A row of action buttons is visible: "Regen Report", "Open In New Window", "Save As Excel", "Change Settings", and "Return To Report List". A table of contacts is displayed below the buttons, with columns for "Contractor", "Firm Name", "Middle Name", "Email", and "Phone". The table contains 15 rows of contact information. A blue box on the left side of the screenshot contains the text "The reporting engine is Ad-Hoc." Red arrows point to specific buttons and table headers, labeled with Roman numerals I through V, corresponding to the steps in the "View Generated Report" section. A "back reporting list" link is also visible in the top right corner of the report area.

Contractor	Firm Name	Middle Name	Email	Phone
	All		contr1b@kennedygrou	7035551212
	Mar		off5plo@yahoo.com	703-615-0003
	hay		webmaster@kennedygrou	703-872-8538
	kita	bob	stateesrs@yahoo.com	703-875-6881
3001, INC.	Contract	Brent	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	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

File Edit View Favorites Tools Help

ESRS TEST

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

Home  
Reports  
Individual  
Summary  
I. Reporting  
My Account

Reporting [back](#)

Saved Reports [? help](#)

Class   
Status

Keywords   
Searches label and description.

Apply Search Clear

Items 1-1 of 1 < Previous | Jump 1 | Next >

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

II., III.

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

### 5.2 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

