

# Electronic Subcontracting Reporting System (ESRS) Government POC User Guide 1.7

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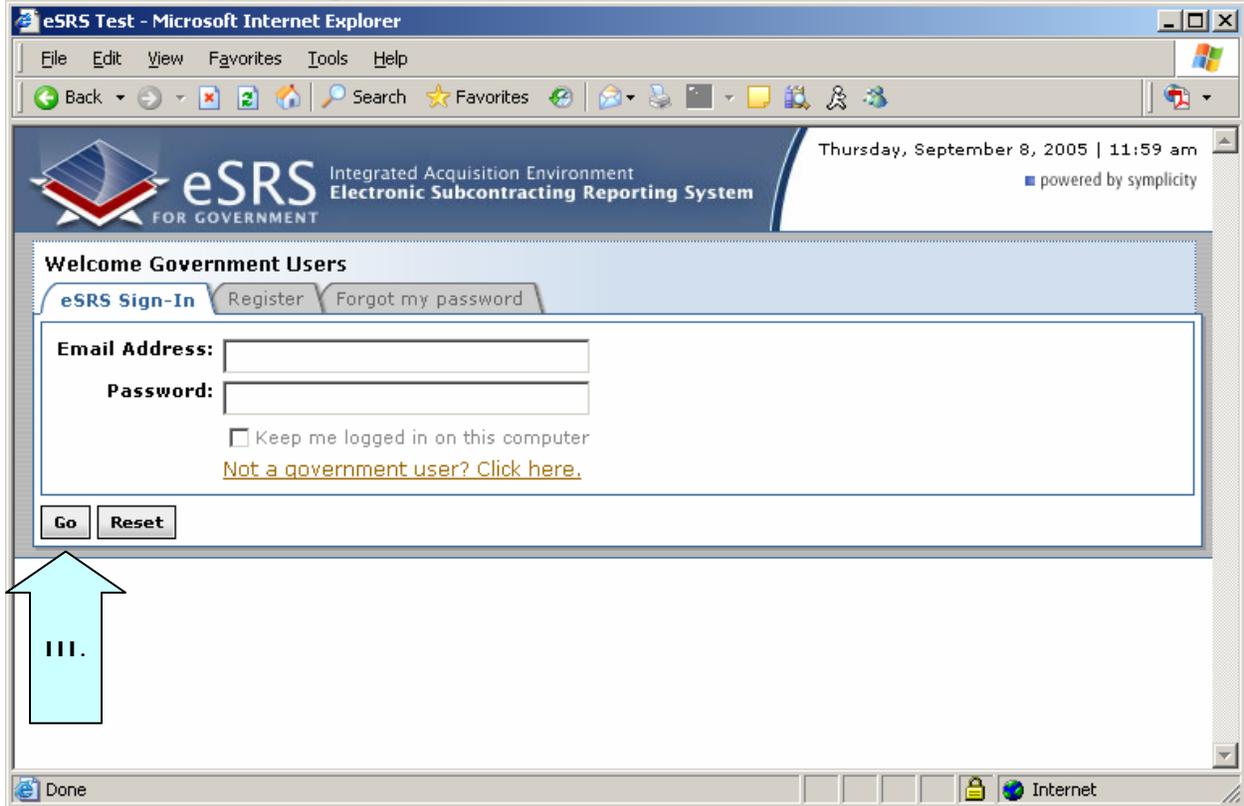
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## 1. Log-In to ESRS

### 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



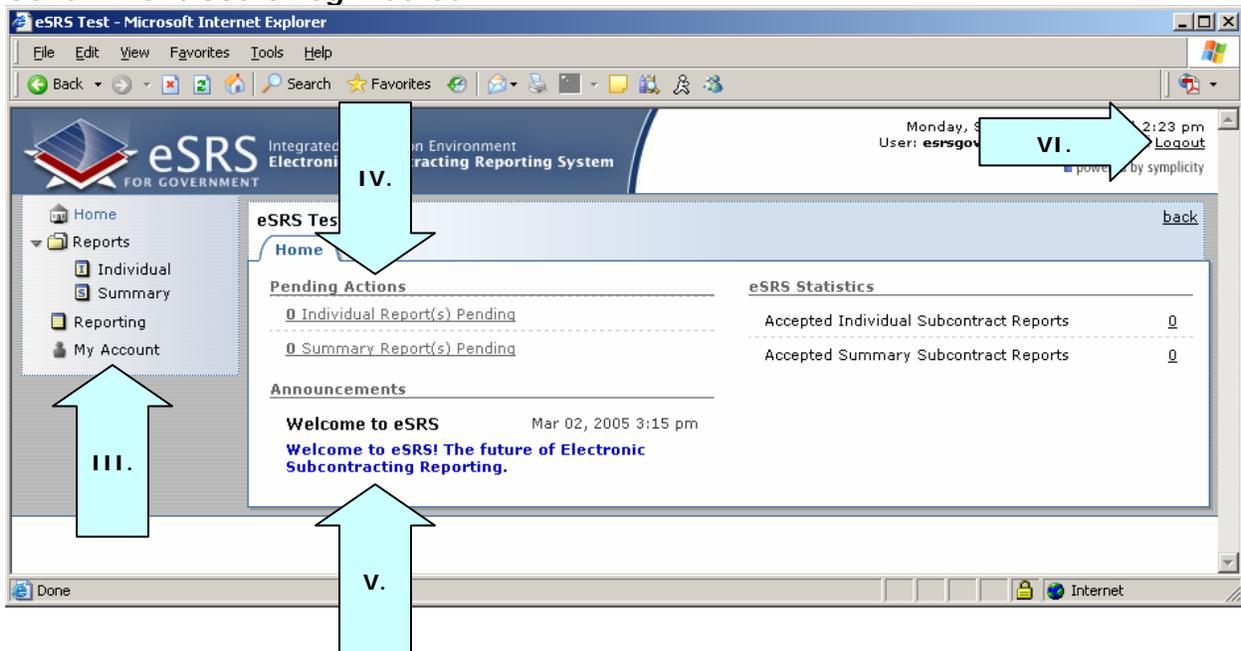
### 1.2 New Users

- 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

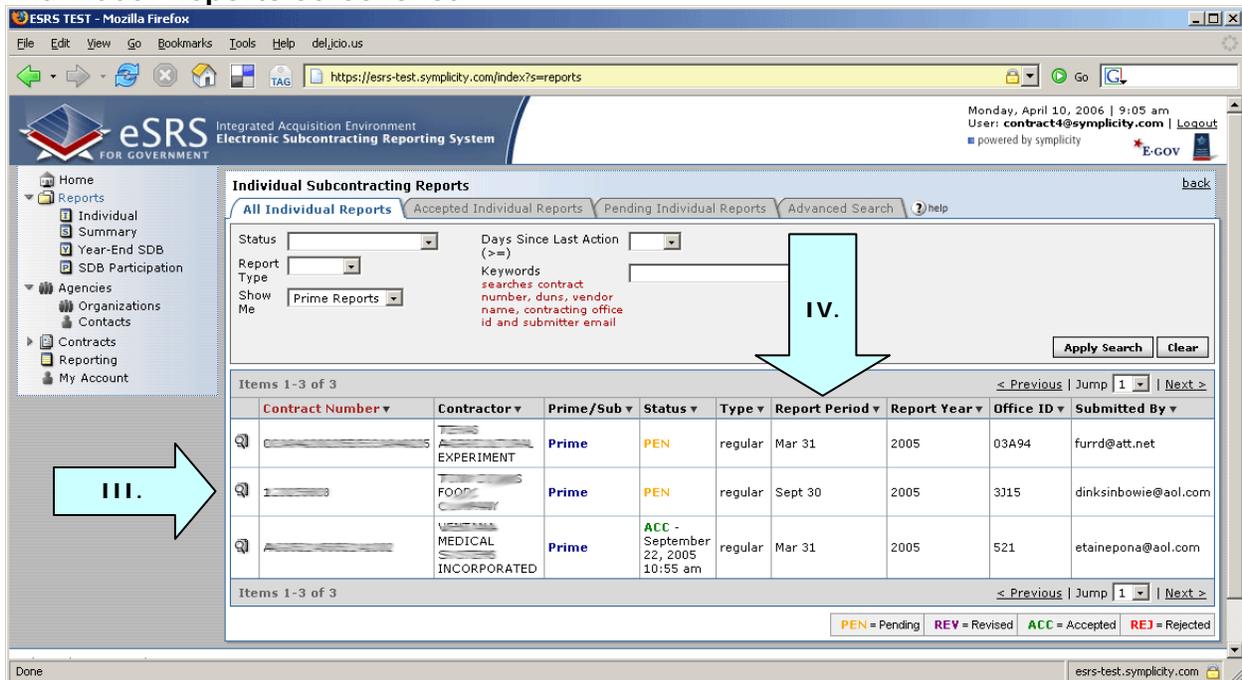


### 3. Reports

#### 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.

#### Individual Reports Screenshot



The screenshot displays the 'Individual Subcontracting Reports' interface. At the top, there are search filters for Status, Days Since Last Action, Report Type, and Keywords. Below the filters is a table of reports with columns: Contract Number, Contractor, Prime/Sub, Status, Type, Report Period, Report Year, Office ID, and Submitted By. A magnifying glass icon (III) is positioned over the first report in the table. A large arrow (IV) points to the 'Contract Number' column header, which is highlighted in maroon. The table contains three rows of data:

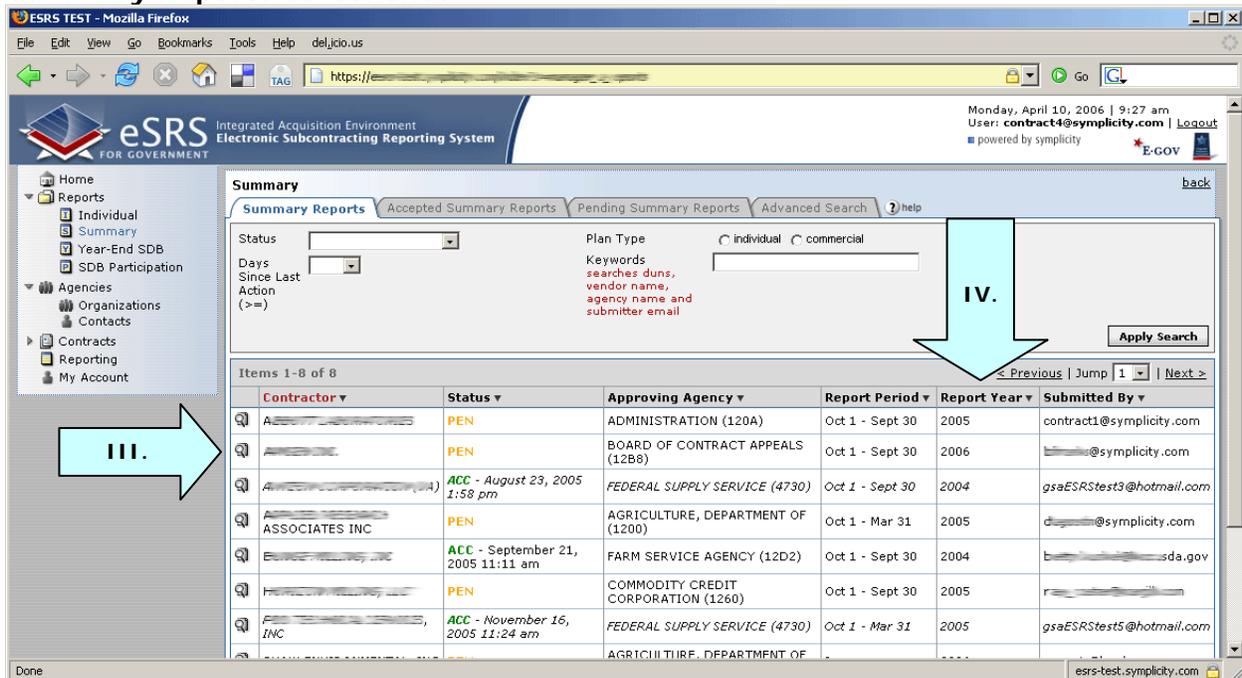
Contract Number	Contractor	Prime/Sub	Status	Type	Report Period	Report Year	Office ID	Submitted By
[REDACTED]	EXPERIMENT	Prime	PEN	regular	Mar 31	2005	03A94	furrd@att.net
[REDACTED]	FOOD	Prime	PEN	regular	Sept 30	2005	3315	dinksinbowie@aol.com
[REDACTED]	MEDICAL INCORPORATED	Prime	ACC - September 22, 2005 10:55 am	regular	Mar 31	2005	521	etainepona@aol.com

At the bottom of the table, there is a legend: PEN = Pending, REV = Revised, ACC = Accepted, REJ = Rejected.

### 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



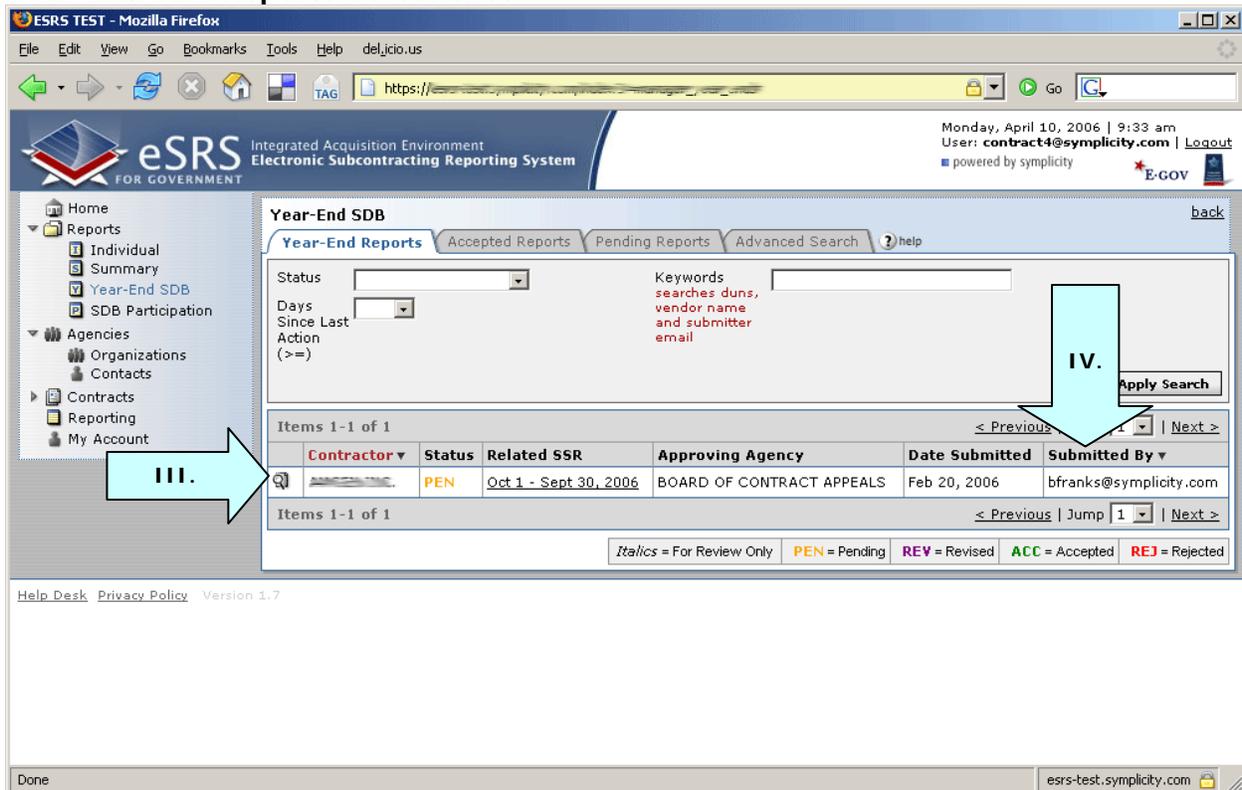
The screenshot displays the ESRS Summary Reports interface. The left navigation menu includes 'Home', 'Reports', 'Individual', 'Summary', 'Year-End SDB', 'SDB Participation', 'Agencies', 'Organizations', 'Contacts', 'Contracts', 'Reporting', and 'My Account'. The main content area is titled 'Summary' and contains search filters for Status, Plan Type, Days, and Keywords. Below the filters is a table of reports with columns for Contractor, Status, Approving Agency, Report Period, Report Year, and Submitted By. A red arrow labeled 'III.' points to a magnifying glass icon in the Contractor column header, and a blue arrow labeled 'IV.' points to a dropdown arrow in the Contractor column header.

Contractor ▼	Status ▼	Approving Agency ▼	Report Period ▼	Report Year ▼	Submitted By ▼
 [REDACTED]	PEN	ADMINISTRATION (120A)	Oct 1 - Sept 30	2005	contract1@simplicity.com
 [REDACTED]	PEN	BOARD OF CONTRACT APPEALS (12B8)	Oct 1 - Sept 30	2006	[REDACTED]@simplicity.com
 [REDACTED]	ACC - August 23, 2005 1:58 pm	FEDERAL SUPPLY SERVICE (4730)	Oct 1 - Sept 30	2004	gsaESRstest3@hotmail.com
 ASSOCIATES INC	PEN	AGRICULTURE, DEPARTMENT OF (1200)	Oct 1 - Mar 31	2005	[REDACTED]@simplicity.com
 [REDACTED]	ACC - September 21, 2005 11:11 am	FARM SERVICE AGENCY (12D2)	Oct 1 - Sept 30	2004	[REDACTED]@sda.gov
 [REDACTED]	PEN	COMMODITY CREDIT CORPORATION (1260)	Oct 1 - Sept 30	2005	[REDACTED]
 [REDACTED], INC	ACC - November 16, 2005 11:24 am	FEDERAL SUPPLY SERVICE (4730)	Oct 1 - Mar 31	2005	gsaESRstest5@hotmail.com
 [REDACTED]		AGRICULTURE, DEPARTMENT OF			

### 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



ESRS TEST - Mozilla Firefox

File Edit View Go Bookmarks Tools Help del.icio.us

https://esrs-test.simplicity.com

Monday, April 10, 2006 | 9:33 am  
User: contract4@simplicity.com | Logout  
powered by simplicity E-GOV

**Year-End SDB** [back](#)

Year-End Reports Accepted Reports Pending Reports Advanced Search ? help

Status  Keywords   
Days Since Last Action (>=)  Keywords searches duns, vendor name and submitter email

Items 1-1 of 1 [< Previous](#) | [Next >](#)

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

Items 1-1 of 1 [< Previous](#) | [Jump 1](#) | [Next >](#)

*Italics* = For Review Only **PEN** = Pending **REV** = Revised **ACC** = Accepted **REJ** = Rejected

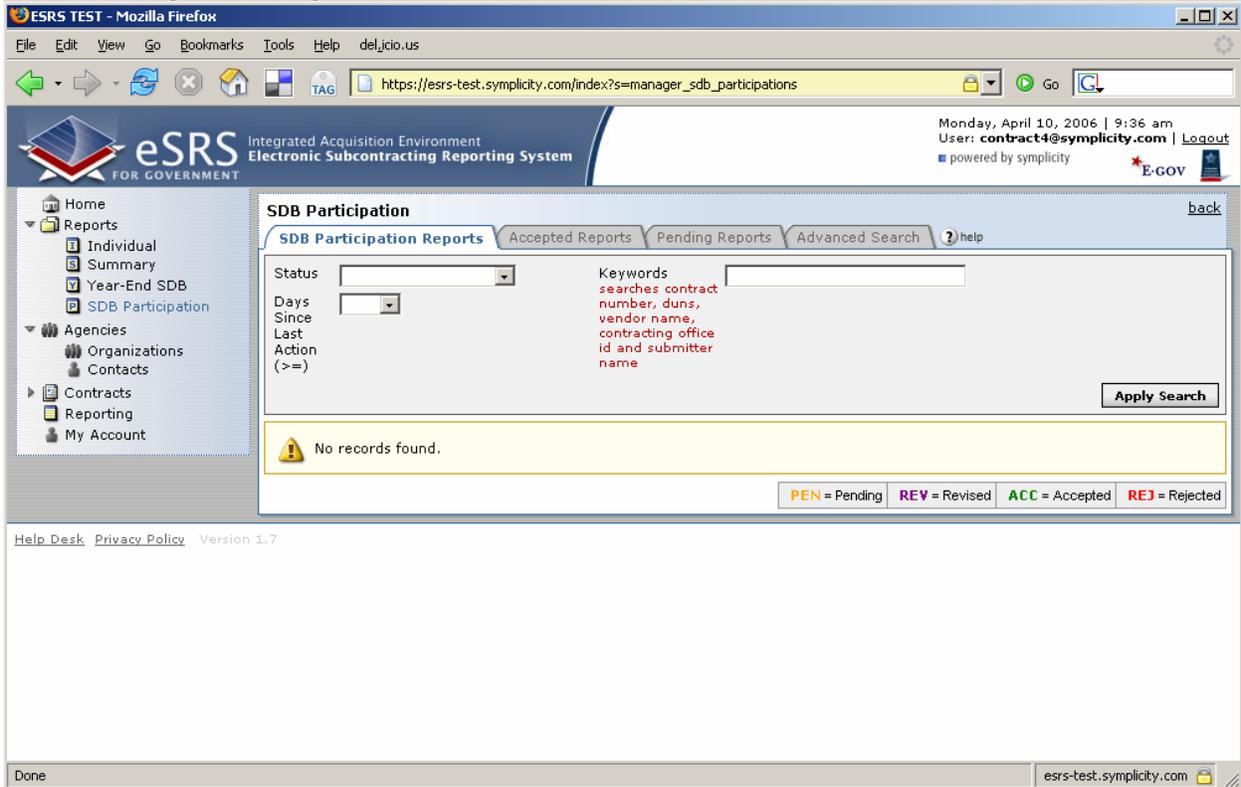
Help Desk Privacy Policy Version 1.7

Done esrs-test.simplicity.com

### 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



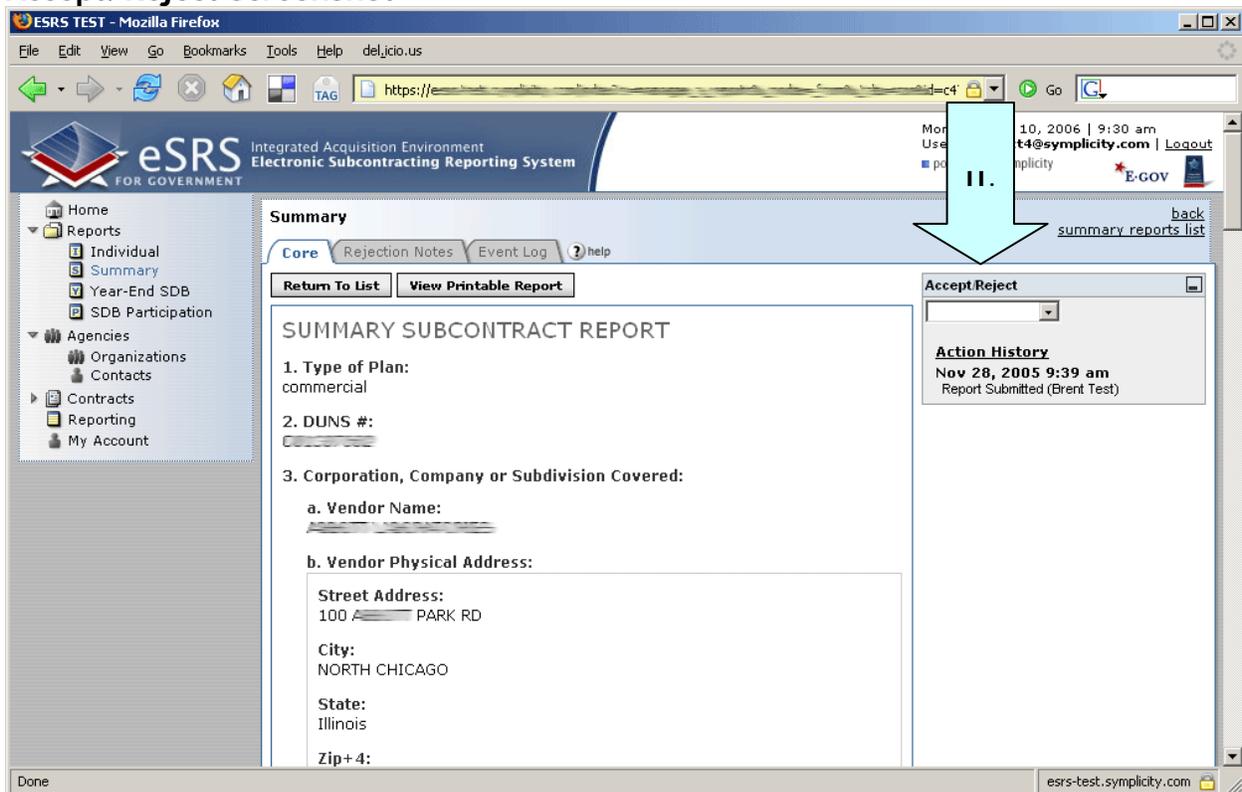
The screenshot displays the eSRS (Integrated Acquisition Environment Electronic Subcontracting Reporting System) interface. The browser window is titled "ESRS TEST - Mozilla Firefox" and the address bar shows the URL "https://esrs-test.symplivity.com/index?s=manager\_sdb\_participations". The page header includes the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System". The user is logged in as "contract4@symplivity.com" on Monday, April 10, 2006, at 9:36 am. The main content area is titled "SDB Participation" and features a search interface with tabs for "SDB Participation Reports", "Accepted Reports", "Pending Reports", and "Advanced Search". The search area includes a "Status" dropdown menu, a "Days Since" dropdown, and a "Keywords" search field with a list of search criteria: "contract number, duns, vendor name, contracting office id and submitter name". An "Apply Search" button is located to the right of the search fields. Below the search area, a yellow warning box displays the message "No records found." At the bottom of the page, there is a legend for report statuses: "PEN = Pending", "REV = Revised", "ACC = Accepted", and "REJ = Rejected". The footer of the page includes "Help Desk", "Privacy Policy", and "Version 1.7".

### 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.

#### Accept/Reject Screenshot

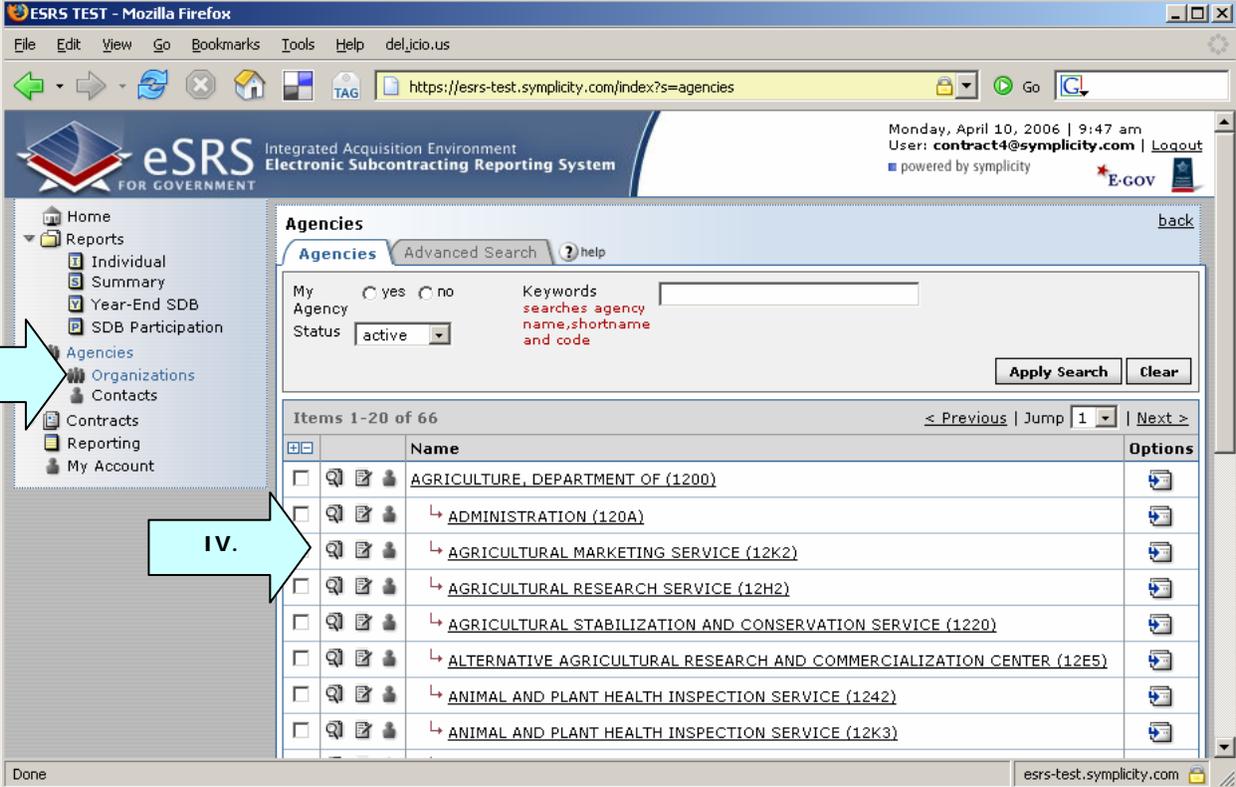


## 4. Agencies (Organizations)

### 4.1 Review / View Existing

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" on the left hand menu.
- III. You will see a screen similar to the "Agencies / Organizations Screenshot" below.
- IV. Click on the  View Icon beside any contractor to see more information pertaining to that specific contractor.
- V. Notice that any child organization will appear below the parent organization and will also have a  to the left of the name.

### Agencies / Organizations Screenshot



The screenshot shows the ESRS web application interface. The browser title is "ESRS TEST - Mozilla Firefox" and the address bar shows "https://esrs-test.simplicity.com/index?s=agencies". The page header includes the ESRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System". The user is logged in as "contract4@simplicity.com".

The left navigation menu includes: Home, Reports (Individual, Summary, Year-End SDB, SDB Participation), Agencies, Organizations (highlighted with a red arrow labeled "II."), Contacts, Contracts, Reporting, and My Account.

The main content area is titled "Agencies" and includes a search filter for "My Agency" (yes/no) and "Status" (active). The search criteria are "searches agency name,shortname and code". The search results show a list of agencies with columns for "Name" and "Options". The first row is "AGRICULTURE, DEPARTMENT OF (1200)". The second row is "ADMINISTRATION (120A)", which is a child organization indicated by a red arrow icon to the left of the name. A red arrow labeled "IV." points to the "View" icon in the "Options" column of the second row.

	Name	Options
<input type="checkbox"/>	AGRICULTURE, DEPARTMENT OF (1200)	
<input type="checkbox"/>	ADMINISTRATION (120A)	
<input type="checkbox"/>	AGRICULTURAL MARKETING SERVICE (12K2)	
<input type="checkbox"/>	AGRICULTURAL RESEARCH SERVICE (12H2)	
<input type="checkbox"/>	AGRICULTURAL STABILIZATION AND CONSERVATION SERVICE (1220)	
<input type="checkbox"/>	ALTERNATIVE AGRICULTURAL RESEARCH AND COMMERCIALIZATION CENTER (12E5)	
<input type="checkbox"/>	ANIMAL AND PLANT HEALTH INSPECTION SERVICE (1242)	
<input type="checkbox"/>	ANIMAL AND PLANT HEALTH INSPECTION SERVICE (12K3)	

## 4.2 Contacts

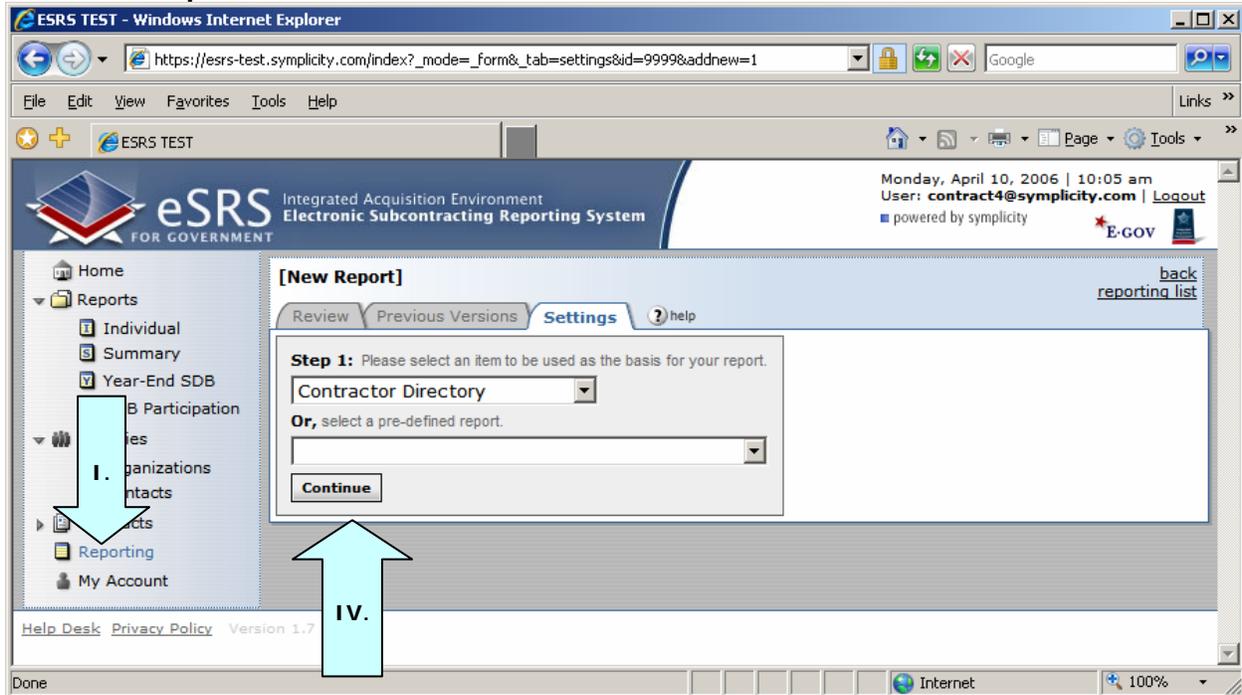
- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" under Agencies.
- III. Click on the  Contacts button next to the agency.
- IV. The Contacts for this agency will appear.
- V. You can set a contact as the primary contact by clicking on the "Set Primary" button.
- VI. You may also edit a contact by clicking on the Edit Icon  beside the contact you wish to edit.
- VII. Finally, to send an e-mail to the contacts, put a checkmark beside the contacts you wish to e-mail. Use the "Batch Options" drop down to send an e-mail.
- VIII. For more information, please read Section 7, Contacts.

## 5. Reporting

### 5.1 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&adnew=1

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

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

Review Previous Versions **Settings** ? help

[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

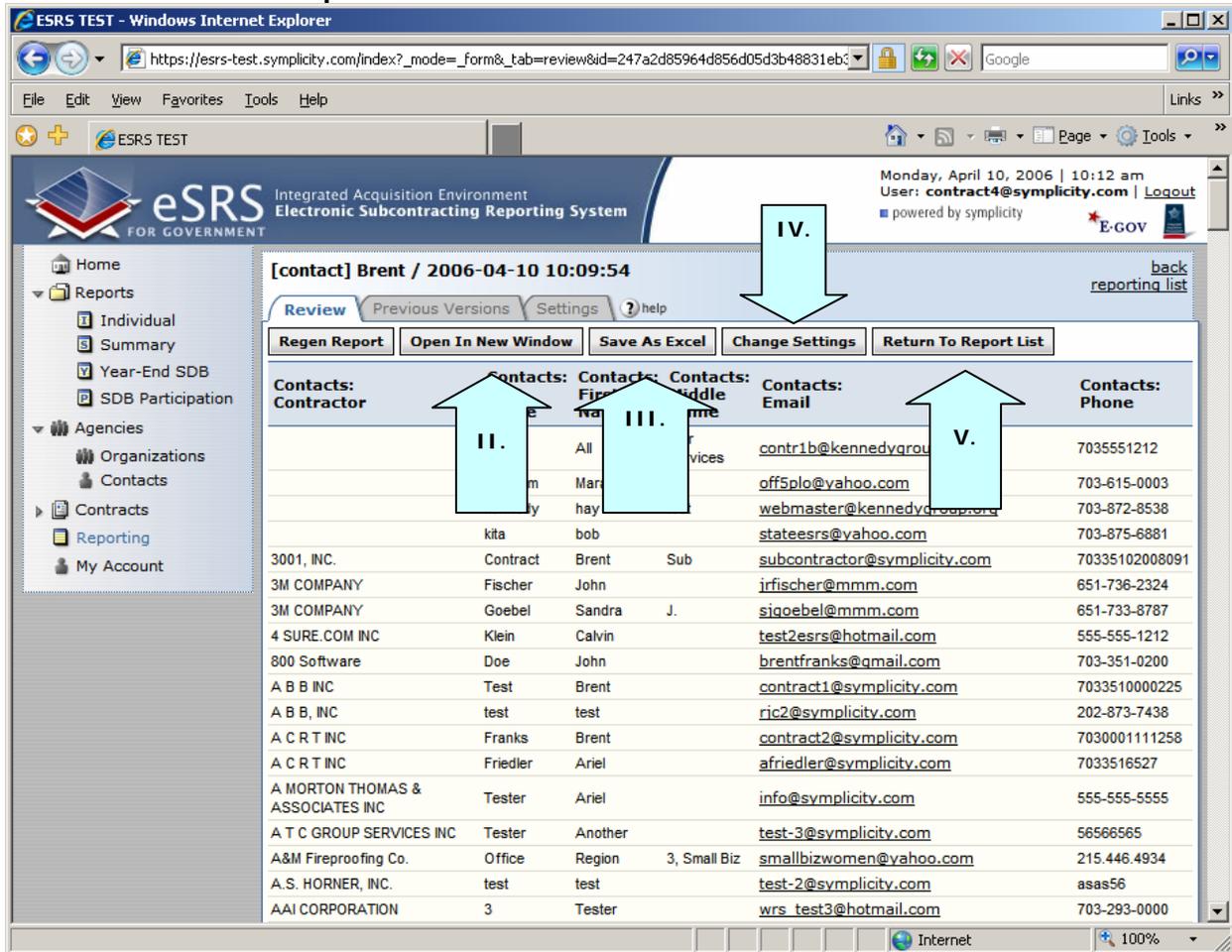
- Contractor
- Last Name
- First Name
- Middle Name
- Email
- Phone
- Fax
- Cell Phone
- Supervisor Name
- Supervisor Email
- SBA Region filter ▶
- SBA Contract filter ▶

Done Internet 100%

## 5.2 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



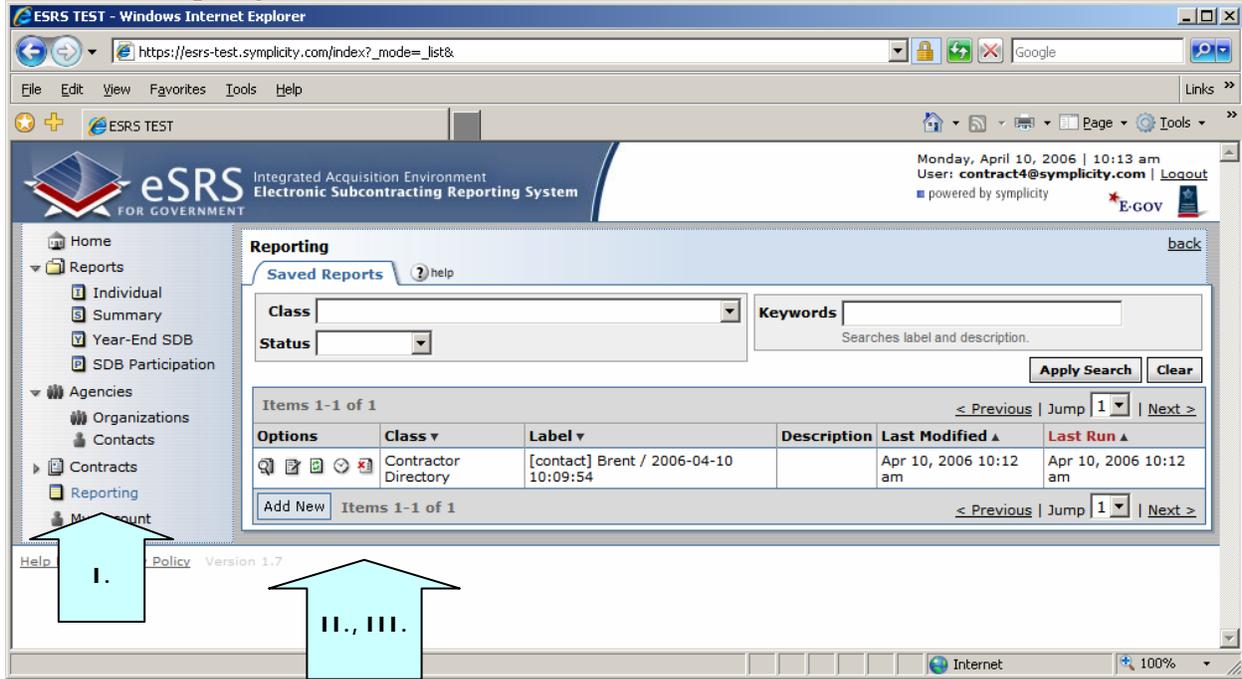
The screenshot shows the ESRS TEST web application interface. At the top, it displays the date and time: Monday, April 10, 2006 | 10:12 am. The user is identified as contract4@simplicity.com. The main content area shows a report titled "[contact] Brent / 2006-04-10 10:09:54". Below the title, there are several tabs: Review, Previous Versions, Settings, and ? help. A row of 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, with columns for Contractor, Name, and Phone. Red arrows point to specific buttons and table columns, corresponding to the steps in the previous list: II. points to the Open In New Window button, III. points to the Save As Excel button, IV. points to the Change Settings button, and V. points to the Return To Report List button.

Contacts: Contractor	Contacts: Name	Contacts: Middle Name	Contacts: Email	Contacts: Phone	
	All	Services	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	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

### 5.3 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 shows the eSRS web application interface. The browser title is "ESRS TEST - Windows Internet Explorer" and the address bar shows "https://esrs-test.simplicity.com/index?\_mode=\_list&". The page header includes the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System". The user is logged in as "contract4@simplicity.com" on Monday, April 10, 2006, at 10:13 am. The left navigation menu has "Reporting" selected. The main content area shows a "Reporting" section with a "Saved Reports" tab. There are search filters for "Class" and "Status", and a "Keywords" search box. Below the search filters is a table of report items:

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

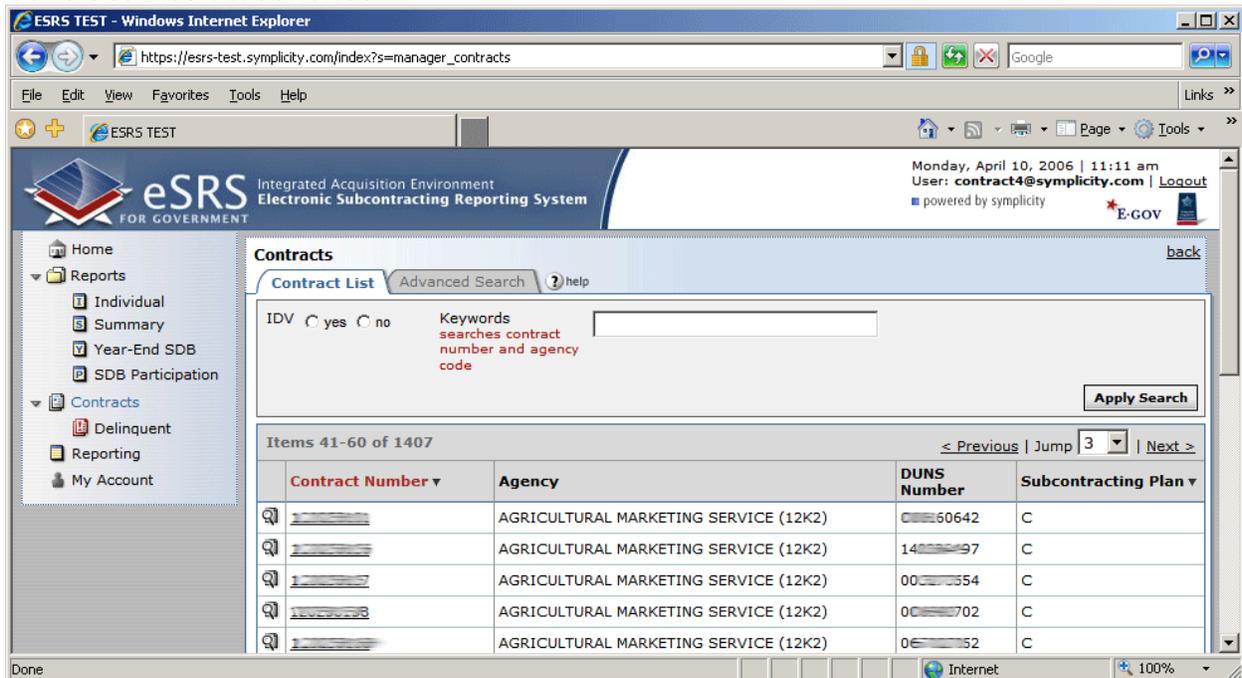
Below the table, there is an "Add New" button and a "Items 1-1 of 1" indicator. The bottom of the page shows "Help Policy Version 1.7" and "Internet 100%".

## 6. Contracts

### Contracts List

- I. Click on "Contracts" on the left hand navigation menu.
- II. You should see a screen similar to the one below.
- III. Click on the  icon or the Contract Number to view the details of the contract.
- IV. You may also use the search criteria (Advanced Search Tab) or the filtering technology to filter the list to a smaller number of results.

### Contract List Screenshot



The screenshot shows the ESRS (Integrated Acquisition Environment Electronic Subcontracting Reporting System) interface. The page title is "ESRS TEST - Windows Internet Explorer". The URL is "https://esrs-test.simplicity.com/index?s=manager\_contracts". The page is dated Monday, April 10, 2006, at 11:11 am. The user is logged in as "contract4@simplicity.com".

The navigation menu on the left includes: Home, Reports (Individual, Summary, Year-End SDB, SDB Participation), Contracts (Delinquent), Reporting, and My Account.

The main content area is titled "Contracts" and has tabs for "Contract List" and "Advanced Search". Below the tabs is a search bar with "Keywords" and an "Apply Search" button. The search criteria are "IDV" (yes/no) and "Keywords searches contract number and agency code".

The table below shows a list of contracts:

Contract Number	Agency	DUNS Number	Subcontracting Plan
[REDACTED]	AGRICULTURAL MARKETING SERVICE (12K2)	0000060642	C
[REDACTED]	AGRICULTURAL MARKETING SERVICE (12K2)	1400000097	C
[REDACTED]	AGRICULTURAL MARKETING SERVICE (12K2)	000000554	C
[REDACTED]	AGRICULTURAL MARKETING SERVICE (12K2)	000000702	C
[REDACTED]	AGRICULTURAL MARKETING SERVICE (12K2)	000000052	C

Note: You may also click on Delinquent underneath "Contracts" to view all contracts that have a delinquent status. A contract is considered delinquent when all of the following conditions are met:

- 1.) A report has been filed for the contract previously.
- 2.) The deadline for a reporting period has passed.
- 3.) No final ISR was filed for the contract.

Delinquent reports only include ISR's, and not SSR's.

## 7. My Account

### 7.1 General Information

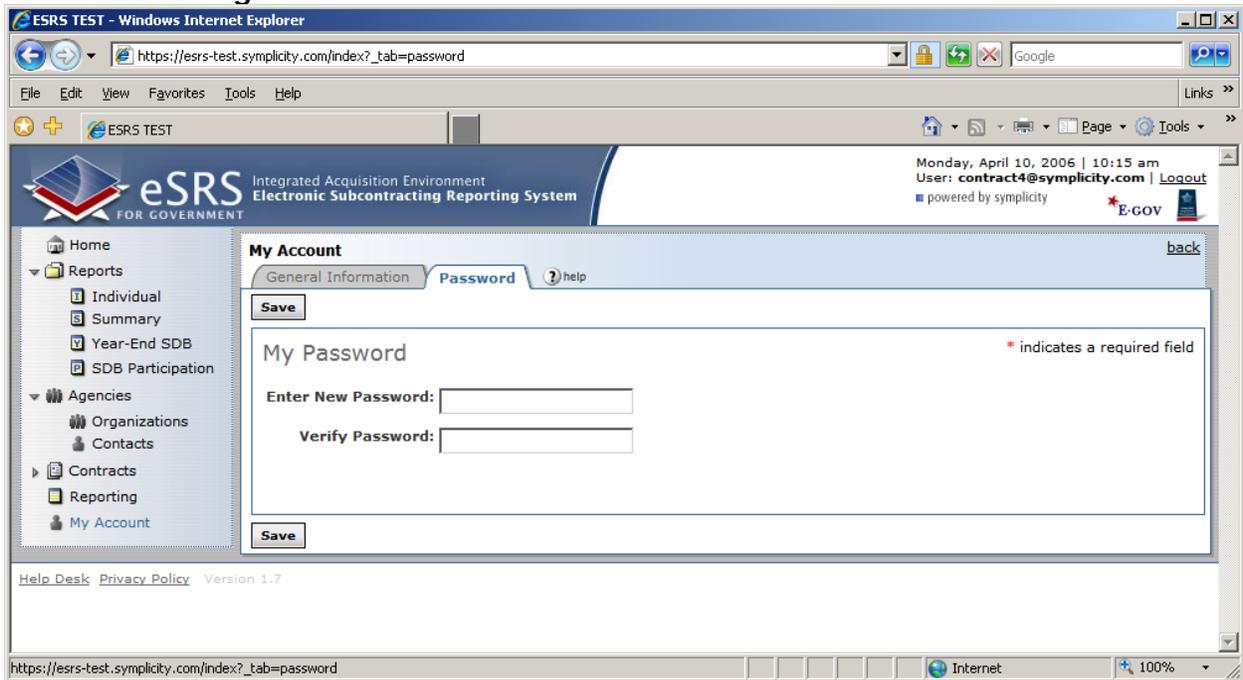
My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

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

### 7.1 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.symplivity.com/index?\_tab=password

File Edit View Favorites Tools Help

ESRS TEST

Monday, April 10, 2006 | 10:15 am  
 User: contract4@symplivity.com | Logout  
 powered by symplivity E.GOV

Home

Reports

- Individual
- Summary
- Year-End SDB
- SDB Participation

Agencies

- Organizations
- Contacts

Contracts

- Reporting
- 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.symplivity.com/index?\_tab=password