

**electronic Subcontracting Reporting System (eSRS) Quick
Reference for
Federal Government Contractors**



How to Generate a Report in eSRS

Table of Contents

eSRS Introduction

Quick Reference #1: What do the Terms “Ad-Hoc” and “Predefined” Mean?

Quick Reference #2: What do the Terms “Pending”, “Accept”, “Reopen” and “Reject” Represent?

Quick Reference #3: How to Access eSRS

Quick Reference #4: How to Generate an Ad Hoc Report

Quick Reference #5: How to View a Report Previously Generated by the User?

Quick Reference #6: What Are Predefined Reports?

Quick Reference #7: How do you Generate a Predefined Report in eSRS?

Quick Reference #8: Who to Contact When in Need of Assistance

Quick Reference #9: Can I Delete a Report?

Quick Reference on How to Generate a Report in eSRS

Introduction: In the past, Federal Government contractors were required to file their Individual Subcontracting Report (ISR) on the Standard Form (SF) 294 and Summary Subcontract Report (SSR) on the Standard Form (SF) 295. The Presidential Management Initiative mandated the development and implementation of an electronic subcontracting process. Thus, the Initial Operating Capability Phase of the electronic Subcontracting Reporting System (eSRS) was implemented in October of 2005. Federal Government contractors are now required to submit their subcontracting accomplishments for Federal Government contracts in the eSRS, with the exception of some Department of Defense (DoD) contracts.

eSRS is a web-based government-wide subcontracting system that allows electronic submission, management (acceptance, revision, rejection), creation of reports and analyses of subcontracting data in a real-time paperless environment. In turn, there is a reduction in errors and processing time and no lost paper work which leaves more time for increasing subcontracting.

Quick Reference Objective: To provide guidance to Federal Government Contractors on how to generate ad hoc and predefined reports in eSRS. This quick reference provides step-by-step instructions on how to generate a report in eSRS, so that you may analyze your agency's subcontracting data. It also provides information on some of eSRS' Predefined Reports.

Quick Reference #1: What do the Terms “Predefined” and “Ad Hoc” Mean?

- **Ad Hoc Report:** An Ad-Hoc Report is one that you create from a criterion that you select. You can name the Ad Hoc Report whatever you want when you save it.
- **Predefined Report:** Predefined reports are reports in which the report basis has been pre-selected. However, additional information is required in the filter by the person generating the report.

Quick Reference #2: What do the Terms “Pending”, “Accept”, “Reopen” and “Reject” Represent?

eSRS Quick Reference on How to Generate a Report in eSRS

Pending: This report has been submitted and is awaiting review to be **“Accepted or Rejected”** by the Federal Government agency that awarded the contract.

Accept: This report has been reviewed by the Federal Government agency that awarded the contract, and they have found no known errors, issues, or concerns and do not require any clarification, information, and/or correction and is, therefore, **“Accepting”** receipt of this report’s data.

- Although receipt of the report’s data has been **“Accepted,”** if upon further review, errors, issues, or concerns are found with the report, the Federal Government agency that awarded the contract will **“Reopen or Reject”** the report to obtain clarification, additional information, and/or correction.

Reopen: This report’s data was previously **“Accepted”** by the Federal Government agency that awarded the contract. However, upon further review of the report’s data, the agency found errors, issues, and concerns and requires clarification, additional information, and/or correction. Once the report concerns have been addressed and/or corrected sufficiently by the contractor and resubmitted, the federal agency will **“Accept”** receipt of the report’s data.

Reject: This report has been reviewed by the Federal Government agency that awarded the contract, and they have found errors, issues and concerns. The report requires clarification, additional information, and/or correction. Thus, they will not accept receipt of the subcontracting report’s data at this time. Once the report concerns have been addressed and/or corrected sufficiently, the federal agency will **“Accept”** receipt of the report’s data.

Quick Reference #3: How to Access eSRS

- Go to www.esrs.gov
- Click on **“Contractor”**
- Click on the **“Register”** tab
- Complete the registration

eSRS Quick Reference on How to Generate a Report in eSRS

- Your user ID and password will be emailed to you confirming your registration
- Once your registration has been confirmed, you can access eSRS

Quick Reference #4: How to Generate an Ad Hoc Report

- i. On your eSRS homepage click on the **“Custom Reports”** link
 - Click on the **“Add New”**
- ii. **Step 1:** use the drop-down menu and choose **Individual Subcontract Report or Summary Subcontract Report OR**
- iii. Click on the second drop-down menu below to select a predefined report
- iv. Click **“Continue”**

The screenshot shows the eSRS web interface for creating a new report. At the top, there is a navigation bar with the eSRS logo and the text 'Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR CONTRACTORS'. Below this is a secondary navigation bar with links: 'myESRS', 'Profile', 'Contract Worklist', 'File / Review Reports', and 'Custom Reports'. The main content area is titled '[New Report]' and features several tabs: 'Review', 'Previous Versions', 'Settings', and 'help'. The 'Settings' tab is active, displaying 'Step 1: Please select an item to be used as the basis for your report.' Below this instruction, there is a dropdown menu with 'Individual Subcontract Report' selected. Below that, there is another dropdown menu that is currently empty. At the bottom of this section is a green 'Continue' button with a right-pointing arrow. At the very bottom of the page, there is a footer with several links: 'For Help: Federal Service Desk', 'Turn Accessibility Mode On', 'Contractor User Guide', 'Registration Instruction Plan', 'Subcontractor Filing ISR', 'SDB Participation Report', and 'SDB Year End Report'.

eSRS Quick Reference on How to Generate a Report in eSRS

Quick Reference #4: How to Generate an Ad Hoc Report (Continued)

- v. In **“Save As”** enter a name for your report and a description
- vi. **Step 2:** Scroll down to select the report data fields
- vii. Click on the box next to the data field you would like to see in your report
- viii. Narrow the focus of the report by clicking on the arrow beside **“filter”** under the individual boxes. You can further define your criteria for that field
- ix. When updating an existing report, save the report under a different name
- x. Click **“Submit”** to generate your report. NOTE: **“Save and continue”** will save the report criteria and return you to the **“Saved Report List”**, but will not run the report.

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

Review Previous Versions **Settings** ? help

! If you would like to filter by a specific agency/agencies, scroll down to the Contract Related class and choose from the agencies in the select list. If you only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their respective sub-agencies. To limit the results to a specific reporting period, use the "Reporting Period Month:" filters.

Save as: [f294] Kathryn I. Fiffick / 2010-04-06 15:23:10 **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: Individual Subcontract Report** Count

Status
 Summarize
[filter](#) ▶

Contract

Target Agency
[filter](#) ▶

Report Submitted As
[filter](#) ▶

Vendor Name

Vendor Physical Address

FPDS Date Signed
[filter](#) ▶

Date Submitted
[filter](#) ▶

eSRS Quick Reference on How to Generate a Report in eSRS

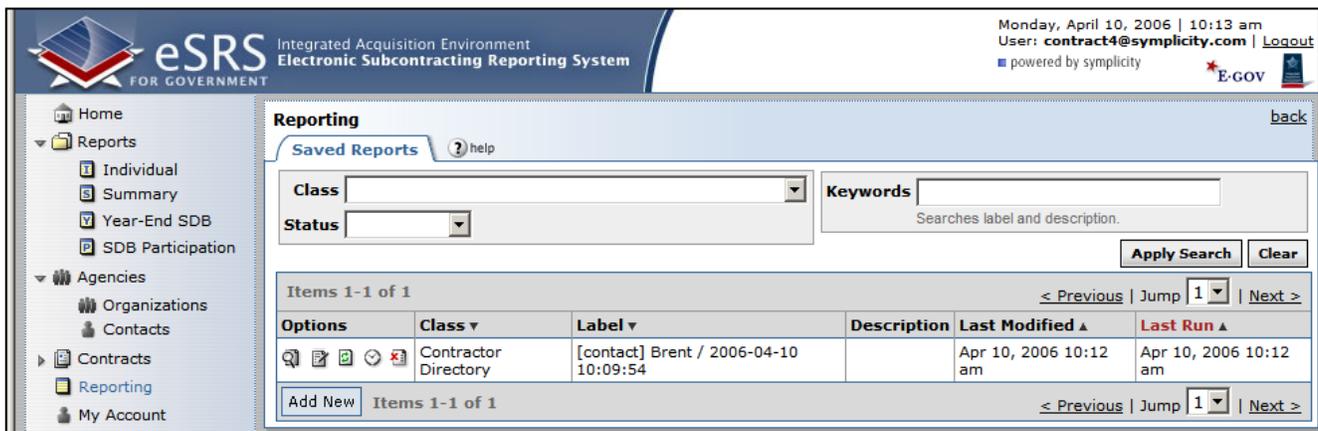
Quick Reference #4: How to Generate an Ad Hoc Report (Continued)

- xI. Click on **“View Report”**
- xII. There are several options available once the report is generated:
 - Run the report again by clicking on **“Regen Report”**
 - Show the report in a separate browser by clicking on the **“Open in New Window”**
 - Transfer the report into an Excel Workbook by clicking **“Save as Excel”**
 - Once you have transferred the report into Excel change the numerical values to numbers; Excel automatically transfers numbers over as text.
 - Re-configure the report by clicking on **“Change Settings”**
 - Go back to the report list by clicking the **“Return to Report List”**

[Subcontracting Achievements by Federal Agency"] Angela Terry / 2007-02-05 15:24:16														
Review Previous Versions Settings help														
Regen Report Open In New Window Save As Excel Change Settings Return To Report List														
Reporting Agency	SB	SB %	LB	LB %	Total	SDB	SDB %	WOSB	WOSB %	HBCU _MI	HBCU _MI %	HUBZ	HUBZ %	VOSE
FY 2006														
STENNIS SPACE CENTER (SSCOO)	46,568,321	94.5	2,723,042	5.5	49,291,363	38,542,394	78.2	36,404,232	73.9	15,274	0.0	6,003,663	12.2	4,433,108
6800 (OLD CODE) (6800)	2,280,843	58.7	1,603,490	41.3	3,884,333	194,158	5.0	383,820	9.9	0	0.0	26,202	0.7	19,501,108
ADMINISTRATION (120A)	655,583	18.1	2,961,788	81.9	3,617,370	7,141	0.2	34,104	0.9	0	0.0	1,860	0.1	10,166,108
AGENCY FOR HEALTH CARE RESEARCH AND QUALITY (7528)	1,571,041	39.6	2,395,156	60.4	3,966,197	725,671	18.3	245,641	6.2	0	0.0	0	0.0	31,108,108
AGENCY FOR INTERNATIONAL DEVELOPMENT (7200)	57,824,800	40.2	85,853,568	59.8	143,678,368	3,328,215	2.3	12,746,807	8.9	32,817	0.0	388,638	0.3	76,712,108
AGRICULTURAL MARKETING SERVICE (12K2)	101,600,517	32.7	208,984,203	67.3	310,584,720	8,813,760	2.8	17,368,274	5.6	92,207	0.0	1,688,782	0.5	11,692,108
AGRICULTURAL RESEARCH SERVICE (12H2)	50,699,360	15.2	282,469,279	84.8	333,168,638	3,475,829	1.0	26,148,886	7.8	0	0.0	7,457,532	2.2	5,938,108
AGRICULTURE, DEPARTMENT OF (1200)	19,149	36.1	33,930	63.9	53,079	44	0.1	26	0.0	0	0.0	0	0.0	174,108

eSRS Quick Reference on How to Generate a Report in eSRS

Quick Reference #5: How to View a Report Previously Generated by the User

- I. View an Existing Report by clicking on **“Reporting”** on the left navigation menu
- II. A list of Saved Queries/Report will be displayed
- III. There are several options to choose from once the reports list is displayed
 - To view the report click on. “

The screenshot displays the eSRS Reporting interface. The top navigation bar includes the eSRS logo, the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR GOVERNMENT", and the user information "Monday, April 10, 2006 | 10:13 am User: contract4@symplicity.com | Logout" along with "powered by symplicity" and "E-GOV" logos.

The left navigation menu contains the following items: Home, Reports (with sub-items: Individual, Summary, Year-End SDB, SDB Participation), Agencies (with sub-items: Organizations, Contacts), Contracts, Reporting, and My Account.

The main content area is titled "Reporting" and features a "Saved Reports" section. It includes search filters for "Class" and "Status", a "Keywords" search box, and "Apply Search" and "Clear" buttons. Below the search filters, a table displays the following report:

Items 1-1 of 1					
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

At the bottom of the table, there is an "Add New" button and navigation controls: "< Previous | Jump 1 | Next >".

eSRS Quick Reference on How to Generate a Report in eSRS

Quick Reference #6: What Are Predefined Reports?

Predefined reports are reports in which the report basis has been pre-selected. However, additional information is required in the filter by the person generating the report. This document will provide a brief synopsis of some of the current predefined reports in eSRS and the processes to generate predefined report. If you are using a predefined report that is not within this document, the description of any predefined report is located above **“Save As”** within the report perimeter screen (see below).

The screenshot shows the 'Settings' tab of the 'ISR All Tiers Report' configuration screen. At the top, the user is identified as 'Angela Terry' and the time is '2008-04-29 13:20:36'. A yellow warning box states: 'Reports will pull from **accepted** Individual Subcontracting Reports from your agency and below. You **MUST** input a prime contract number using the filter underneath the Contract Number field. Additionally, select a reporting period from which you would like to pull the report data.' Below this, the 'Save as' field is populated with the current report name and time. A 'Max. on-screen results' field is set to '500'. The 'Description' field is empty. The 'Copy to new report' checkbox is unchecked. A 'Step 2' instruction asks the user to select fields and filters. The 'Base Class' is set to 'Individual Subcontract Report'. A list of fields to include is shown with checkboxes: Vendor Name, Prime Contract Number (with a 'filter' link and an input field for a contract number), Subcontract Number, Subcontract Value, Higher Tiered Duns #, Current Contract Value, DUNS # (with a 'filter' link), and Reporting Period Month.

Subcontracting Contractor Award Dollars:

Reports will pull from **accepted** Summary Subcontracting Reports from your organization. It will provide you with a picture of your subcontracting accomplishments for a particular agency. You may filter to specific agencies or reporting periods by clicking on the "filter" link underneath the field you desire to filter. If you would like to filter by a specific agency/agencies, find the "Agency To Which You are Submitting Report" filter and choose from the agencies in the select list. If you only want reports from the exact

eSRS Quick Reference on How to Generate a Report in eSRS

agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their respective sub-agencies.

Note: You may use the "filter" function to obtain data for a specific agencies, reporting periods, report submitter, SBA Regions or Contracting Areas, or by specific states by clicking on the "filter" link underneath the field you desire to filter, if you do not use the filter all data will show within the report. The information below will provide guidance on how to use the filter when running the report:

- Enter the DUNS# of the prime contractor by using the filter underneath **"DUNS#"**
- To select a report for a specific agency use the filter under the **"Agency to Which You Are Submitting Report"**). From the drop down menu select the agency for which you are pulling data
- If you only want data from the agencies you selected, check the **"Limit filter to select values" checkbox**; otherwise, reports will pull from the agencies selected and their respective sub-agencies
- By not choosing any agencies, all agencies will appear in the report results
- Select a specific reporting period (Oct 1- March 31 or Oct 1 –Sept 30) by selecting from the drop down menu under **"Reporting Period Month"**
- Select specific reporting years you would like to evaluate by selecting from the drop down menu under **"Reporting Period Year"**
- If you would like to select reports submitted for a specific contractor type use the filter underneath **"Report Submitted As"**. **Remember choosing both will give you a contractor that has provided their data as a prime and subcontractor.** If you do not use the filter, the report will pull in data for available choices
- View contractor's award dollar by state and/or country, using the filter underneath the **"Summary Subcontract Report: Vendor Physical Address"** make your selection from the dropdown menu

eSRS Quick Reference on How to Generate a Report in eSRS

Analysis of Subcontracting Plan Goal Attainment:

Reports will pull from **accepted** Individual Subcontracting Reports from your organization. The report will default to DUNS # you are registered under. You must select a reporting period to view. If you would like to filter by a specific agency/agencies, find the Agency filter underneath the "Contract" Related class and choose from the agencies in the select list. If you only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their respective sub-agencies.

Note: You may use the "filter" function to obtain data for a specific contractor by entering the DUNS#, reporting period and report type, by clicking on the "filter" link underneath the field you desire to filter, if you do not use the filter all data will show within the report. The information below will provide guidance on how to use the filter when running the report:

- To select a report for a specific agency use the filter under the **"Target Agency,"** check the **"Limit Filter to Select Values"** checkbox; otherwise, reports will pull from the agency selected and their respective sub-agencies
- If you would like to select reports submitted exclusively by the primes or subs, use the filter underneath **"Report Submitted As"**. Otherwise the report will pull all choices into the results
- Enter the prime contract number by using the filter underneath **"Prime Contract Number"**
- Enter the DUNS # of the prime contractor by using the filter underneath **"DUNS #"**
- Select a specific reporting period (month/year) by selecting from the drop down menu under **"Reporting Period Month"**
- If you would like to select a specific type of report (regular/final) use the filter under **"Report Type"**. If you do not select a specific report type the report will pull both (regular/final) reports

Subcontracting Achievements by Federal Agency:

eSRS Quick Reference on How to Generate a Report in eSRS

Reports will pull from **accepted** Summary Subcontracting Reports from your agency and below. You may filter to specific agencies, reporting periods, and report submitter by clicking on the "filter" link underneath the field you desire to filter. If you would like to filter by a specific agency/agencies, find the "Agency To Which You are Submitting Report" filter and choose from the agencies in the select list. If you only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their respective sub-agencies.

Note: You may use the "filter" function to obtain data for a specific agencies, reporting period, report submitter and type of plan by clicking on the "filter" link underneath the field you desire to filter, if you do not use the filter all data will show within the report. The information below will provide guidance on how to use the filter when running the report:

To select a report for a specific agency use the filter under the **"Agency to Which You Are Submitting Report"**. From the drop down menu select the agency for which you are pulling data.

- If you only want reports from the agencies you selected, check the **"Limit filter to select values"** checkbox; otherwise, reports will pull from the agencies selected and their respective sub-agencies.
- By not choosing any agencies, all available agencies will appear in the report results.
- Select a specific reporting period (Oct 1- March 31 or Oct 1 –Sept 30) by selecting from the drop down menu under **"Reporting Period Month"**.
- Select specific reporting years you would like to evaluate by selecting from the drop down menu under **"Reporting Period Year"**.
- If you would like to select reports submitted exclusively by the primes/sub/**both** (remember **"both"** is a contractor that has submitted their data as a prime and subcontractor). Use the filter underneath **"Report Submitted As"**. Otherwise the report will pull all choices into the results.

eSRS Quick Reference on How to Generate a Report in eSRS

- Select the type of plan (Individual/Commercial) data you would like to view by using the filter underneath the **“Type of Plan”**. If nothing is selected, the report will pull in the results data from all choices.

ISR All Tiers Report:

Reports will pull from **accepted** Individual Subcontracting Reports from your organization. You **MUST** input a prime contract number using the filter underneath the Contract Number field. Additionally, select a reporting period from which you would like to pull the report data.

Note: You may use the “filter” function to obtain data for a specific prime contract, reporting period, and contractor by entering the DUNS#, report type and agency by clicking on the "filter" link underneath the field you desire to filter, if you do not use the filter all data will show within the report. The information below will provide guidance on how to use the filter when running the report:

- To select a report for a specific agency use the filter under the **“Target Agency”**, check the **"Limit Filter to Select Values"** checkbox; otherwise, reports will pull from the agency selected and their respective sub-agencies.
- Enter the prime contract number by using the filter underneath **“Prime Contract Number”**.
- Enter the DUNS# of the prime contractor by using the filter underneath **“DUNS#”**.
- Select a specific reporting period (month/year) by selecting from the drop down menu under **“Reporting Period”**.

Time-Phased Individual Subcontract Report:

Reports will pull from **accepted** Individual Subcontracting Reports from your organization. To choose the time period, use the filter under Reporting Period Month to select the start month/year and the end month/year. If you would like to filter exclusively to reports submitted by you or your subs, use the filter underneath Report Submitted As. To filter on a specific contract, please use the filter underneath Prime Contract Number. Lastly, if

eSRS Quick Reference on How to Generate a Report in eSRS

you want to filter based on specific agencies, find the Agency filter underneath the "Contract" Related class. If you only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their respective sub-agencies.

- If **"N/A"** is in a field within the report, this is an indication that eSRS had no **"Accepted"** data available on the contractor for the reporting period you have requested. This is a serious problem if the previous year report was **not** a final, because the ISR is due semi-annually even if no subcontracting has taken place. If **"N/A"** is within the report, check the ISRs submitted to your agency to ensure that all reports have been **"Accepted"**. If no report was filed, contact the contractor and have them file the report.

Note: You may use the "filter" function to obtain data for a specific prime contract, reporting period, report submitter, report type and agency by clicking on the "filter" link underneath the field you desire to filter, if you do not use the filter all data will show within the report. The information below will provide guidance on how to use the filter when running the report:

- To select a report for a specific agency use the filter under the **"Target Agency"**, check the **"Limit Filter to Select Values"** checkbox; otherwise, reports will pull from the agency selected and its respective sub-agencies.
- If you would like to select reports submitted exclusively by the primes or subs, use the filter underneath **"Report Submitted As."** Enter the prime contract number by using the filter underneath **"Prime Contract Number"**.
- Select the time period, use the filter under **Reporting Period Month** to select the start month/year and the end month/year.
- If you would like to select a specific type of report (regular/final) use the filter under **"Report Type."**

eSRS Quick Reference on How to Generate a Report in eSRS

ISR Status Report

This report provides a status summary (Pending, Reopen, Rejected, Revised, and Accepted) and count of Individual Subcontracting Reports submitted by your organization. There are selected fields that allow you to filter on specific data such as a specific report status, agency/agencies, contract number, etc.. These fields are notated by the word "filter" to utilize the "filter" click on "filter" and enter the requested data. When using the "filter" for a specific agency scroll down to the "Agency To Whom You Are Submitting the Report" click "filter" and choose from the agencies in the select list. If you only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their respective sub-agencies. To limit the results to a specific reporting period, use the "Reporting Period Month:" filters.

SSR Status Report

This report provides a status summary (Pending, Reopen, Rejected, Revised, and Accepted) and count of Summary Subcontracting Reports submitted by your organization. There are selected fields that allow you to filter on specific data such as a specific report status, agency/agencies, contract number, etc.. These fields are notated by the word "filter" to utilize the "filter" click on "filter" and enter the requested data. When using the "filter" for a specific agency scroll down to the "Agency To Whom You Are Submitting the Report" click "filter" and choose from the agencies in the select list. If you only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their respective sub-agencies. To limit the results to a specific reporting period, use the "Reporting Period Month:" filters.

eSRS Quick Reference on How to Generate a Report in eSRS

Quick Reference #7: How do you Generate a Predefined Report in eSRS?

- I. Create a New Report by clicking on **“Reporting”** on the left navigation menu
- II. At the next screen click, on **“Add New”**

The screenshot shows the 'Reporting' interface. At the top, there are tabs for 'Saved Reports' and 'help'. Below the tabs are search filters for 'Class', 'Status', and 'Keywords'. The 'Keywords' field has a note: 'Searches label and description.' There are 'Apply Search' and 'Clear' buttons. Below the search filters is a table with 6 items. The table has columns for 'Options', 'Class', 'Label', 'Description', 'Last Modified', and 'Last Run'. The 'Options' column contains icons for search, print, refresh, and delete. The 'Class' column contains report names. The 'Label' column contains report identifiers. The 'Description' column contains brief descriptions. The 'Last Modified' column contains dates and times. The 'Last Run' column contains dates and times. At the bottom of the table, there is an 'Add New' button and a 'Items 1-6 of 6' indicator. There are also navigation buttons for '< Previous', 'Jump 1', and 'Next >'.

Options	Class	Label	Description	Last Modified	Last Run
	Federal Procurement Subcontract Report (SBA Version)	[Federal Procurement Subcontract Report (SBA Version)] Angela Terry / 2007-02-02 12:42:18		Feb 02, 2007 12:46 pm	Feb 2, 2007, 12:46 pm
	Analysis of Subcontracting Plan Goal Attainment	[Analysis of Subcontracting Plan Goal Attainment] Angela Terry / 2007-02-02 12:30:20		Feb 02, 2007 12:39 pm	Feb 2, 2007, 12:39 pm
	Summary Subcontract Report	[f295] Angela Terry / 2007-01-31 17:36:35		Jan 31, 2007 5:39 pm	Jan 31, 2007, 5:39 pm
	Federal Procurement Subcontract Report (SBA Version)	[GoalingReportRolled - "Federal Procurement Subcontract Report (SBA Version)"] Angela Terry / 2006-11-01 10:55:36		Nov 01, 2006 10:56 am	Nov 1, 2006, 10:56 am
	Subcontracting Achievements by Federal Agency	[GoalingReport - "Goaling Report"] Angela Terry / 2006-07-31 10:04:20		Sep 14, 2006 12:30 pm	Sep 14, 2006, 12:30 pm
	5 Year Contractor Trend Report	[5 Year Contractor Trend Report] Angela Terry / 2006-11-27 10:27:41		Nov 27, 2006 10:30 am	-

III. From the drop down menu select a **“Predefined Report”**

IV. Click **“Continue”**

The screenshot shows the '[New Report]' interface. At the top, there are tabs for 'Review', 'Previous Versions', 'Settings', and 'help'. There is a 'back reporting list' link in the top right corner. Below the tabs is a 'Step 1' instruction: 'Please select an item to be used as the basis for your report.' There is a dropdown menu with 'Contractor Directory' selected. Below this is the instruction: 'Or, select a pre-defined report.' There is a dropdown menu with a list of predefined reports: 'Subcontracting Contractor Award Dollars', '5 Year Contractor Trend Report', 'ISR First Tier Report', 'Analysis of Subcontracting Plan Goal Attainment', 'Subcontracting Achievements by Federal Agency', 'Federal Procurement Subcontract Report (SBA Version)', 'ISR All Tiers Report', and 'Time-Phased Individual Subcontract Report'.

eSRS Quick Reference on How to Generate a Report in eSRS

- V. The required report criteria will be pre-selected within the **“Predefined Report”**. However, other information will need to be provided by the user (i.e., reporting year, agency or sub-agency).
- VI. Helpful information and guidance about selecting the additional report parameters will be displayed at the top of the screen
- VII. Once you have completed selecting your report criteria click **“Submit”** to generate the report. If you click on **“Save & Continue”**, you will be taken back to the **“Predefined Report”** menu screen.

Save as: [Subcontracting Achievements by Federal Agency"] Angela Terry **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: Summary Subcontract Report** Count

- Agency To Which You are Submitting Report
filter ▶
- Reporting Period Month
filter ▶
- Reporting Period Year
filter ▶
2007 ▼
- Report Submitted As
filter ▶
- Type of Plan
filter ▶
- SBC Whole Dollars
- LBC Whole Dollars
- TOTAL Dollars
- SDB Dollars
- WOSB Dollars
- HBCU and MI Dollars
- HUBZone Dollars
- VOSB Dollars
- SDVOSB Dollars

eSRS Quick Reference on How to Generate a Report in eSRS

- VIII. Click on **“View Report”** the report will be displayed
- IX. There are several options available once the report is generated:
- Run the report again by clicking on **“Regen Report”**
 - Show the report in a separate browser by clicking on the **“Open in New Window”**
 - Transfer the report into an Excel Workbook by clicking the **“Save as Excel”**. Once you have transferred the report into Excel, change the numerical values to numbers. Excel automatically transfers numbers over as text
 - Re-configure the report by clicking on **“Change Settings”**
 - Go back to the report list by clicking the **“Return to Report List”**

[Subcontracting Achievements by Federal Agency"] Angela Terry / 2007-02-05 15:24:16														
Review Previous Versions Settings ? help														
Regen Report Open In New Window Save As Excel Change Settings Return To Report List														
Reporting Agency	SB	SB %	LB	LB %	Total	SDB	SDB %	WOSB	WOSB %	HBCU _MI	HBCU _MI %	HUBZ	HUBZ %	VOSB
FY 2006														
STENNIS SPACE CENTER (SSCOO)	46,568,321	94.5	2,723,042	5.5	49,291,363	38,542,394	78.2	36,404,232	73.9	15,274	0.0	6,003,663	12.2	4,433,8
6800 (OLD CODE) (6800)	2,280,843	58.7	1,603,490	41.3	3,884,333	194,158	5.0	383,820	9.9	0	0.0	26,202	0.7	19,501
ADMINISTRATION (120A)	655,583	18.1	2,961,788	81.9	3,617,370	7,141	0.2	34,104	0.9	0	0.0	1,860	0.1	10,166
AGENCY FOR HEALTH CARE RESEARCH AND QUALITY (7528)	1,571,041	39.6	2,395,156	60.4	3,966,197	725,671	18.3	245,641	6.2	0	0.0	0	0.0	31,108
AGENCY FOR INTERNATIONAL DEVELOPMENT (7200)	57,824,800	40.2	85,853,568	59.8	143,678,368	3,328,215	2.3	12,746,807	8.9	32,817	0.0	388,638	0.3	76,712
AGRICULTURAL MARKETING SERVICE (12K2)	101,600,517	32.7	208,984,203	67.3	310,584,720	8,813,760	2.8	17,368,274	5.6	92,207	0.0	1,688,782	0.5	11,692,
AGRICULTURAL RESEARCH SERVICE (12H2)	50,699,360	15.2	282,469,279	84.8	333,168,638	3,475,829	1.0	26,148,886	7.8	0	0.0	7,457,532	2.2	5,938,1
AGRICULTURE, DEPARTMENT OF (1200)	19,149	36.1	33,930	63.9	53,079	44	0.1	26	0.0	0	0.0	0	0.0	174

eSRS Quick Reference on How to Generate a Report in eSRS

Quick Reference #8: Who to Contact When in Need of Assistance

Non-technical Questions:

- Non-technical Questions are policy, processes and procedures related to Subcontracting and Subcontracting Reporting and information related to the contract. These questions will not be handled by the Federal Service Desk (FSD).
- Non-technical Question Examples:
 - Any questions pertaining to subcontracting and subcontracting reporting
 - Any questions pertaining to the data in a subcontracting report you submitted or have the responsibility to review
 - Any question related to the contract or subcontracting plan
 - Any questions related to data within eSRS or eSRS user responsibilities
 - eSRS agency contact information (i.e. Agency Coordinator or Point of Contact) for FOIA request and assistance on items with which the technical help desk cannot assist you
- Using the FSD website at www.fsd.gov, you can submit a non-technical help desk issue by selecting “**Submit a Question**” tab and select “**Policy**”. When you submit the webform, the SBA Procurement Analyst assigned to answer subcontracting questions will respond with an answer.
- If you call the FSD 800 number with a non-technical question, the FSD representative will not be able to answer your question, but will provide you with the email address of the SBA Procurement Analyst assigned to answer subcontracting questions and the eSRS Agency Coordinator and Point of Contact for the agency to which you report.
- You may also contact the contracting officer (CO) of the Federal Government agency that awarded the contract for questions, concerns, or issues pertaining to subcontracting and subcontracting reporting.
- For training and subcontracting policy questions, contact the SBA Commercial Marketing Representative (CMR) for your area/state. You may locate your CMR’s contact information at http://www.sba.gov/aboutsba/sbaprograms/gcbd/GC_PCRD1.html

eSRS Quick Reference on How to Generate a Report in eSRS

Technical Questions:

- Technical Questions will be handled by FSD. You may submit a technical help desk question by going directly to FSD at www.fsd.gov and choosing to chat live with a representative, submit a question, search the answer center or call and speak to a representative. You may also reach the FSD website by logging on to eSRS at www.esrs.gov. Click the “**For Help Federal Service Desk**” and you will be forwarded to the FSD website. Remember, FSD will not answer any non-technical or subcontracting/subcontracting reporting questions related to policies, processes and procedures.
- Technical Questions Examples:
 - Questions pertaining to how the system functions (i.e., Do I need a contract number to file an ISR?)
 - Questions pertaining to user functionality (i.e., add a role, registration, contract work list, can't view report)
 - eSRS agency contact information (i.e., Agency Coordinator or Point of Contact) for FOIA request and assistance on items with which the technical help desk cannot assist you
 - General information on the subcontracting reports being filed (i.e., When is the ISR due?)

At the Federal Service Desk (www.fsd.gov) you can:

- Obtain a user id and password (not required) by registering at the www.fsd.gov website. This will allow you to:
 - Keep historical information on your help desk inquiries
 - Check the status of your help desk ticket
- Find information you need by searching several ways in the Answer Center
- Submit a help desk request online
- Give feedback through a customer satisfaction survey
- Chat live with a Customer Service Representative
- Speak to a help desk representative by calling within the U.S. toll free at 1-866-606-8220 or outside the U.S. at 334-206-7828
- Contact FSD at www.fsd.gov, if the information pulled from your DUNS # is incorrect

eSRS Quick Reference on How to Generate a Report in eSRS

For all other concerns, contact Integrated Acquisition Environment at integrated.acquisition@gsa.gov

Quick Reference #9: Can I Delete a Report?

- Only contractor's draft reports can be deleted
- Click on "**Delete**" by the report you would like to have deleted