

Electronic Subcontracting Reporting System (ESRS) Contracting Official User Guide 1.7

DISCLOSURE: This Instruction Manual has been prepared solely for the benefit of ESRS users. By accepting delivery of this Instruction Manual, the recipient hereby agrees that the information contained in this Instruction Manual, in whole or part, is confidential and proprietary and that it will not reproduce or redistribute such Instruction Manual, discuss the information contained herein or make reproductions without the prior written approval of the IAE, and will hold all information in confidence.

Table of Contents

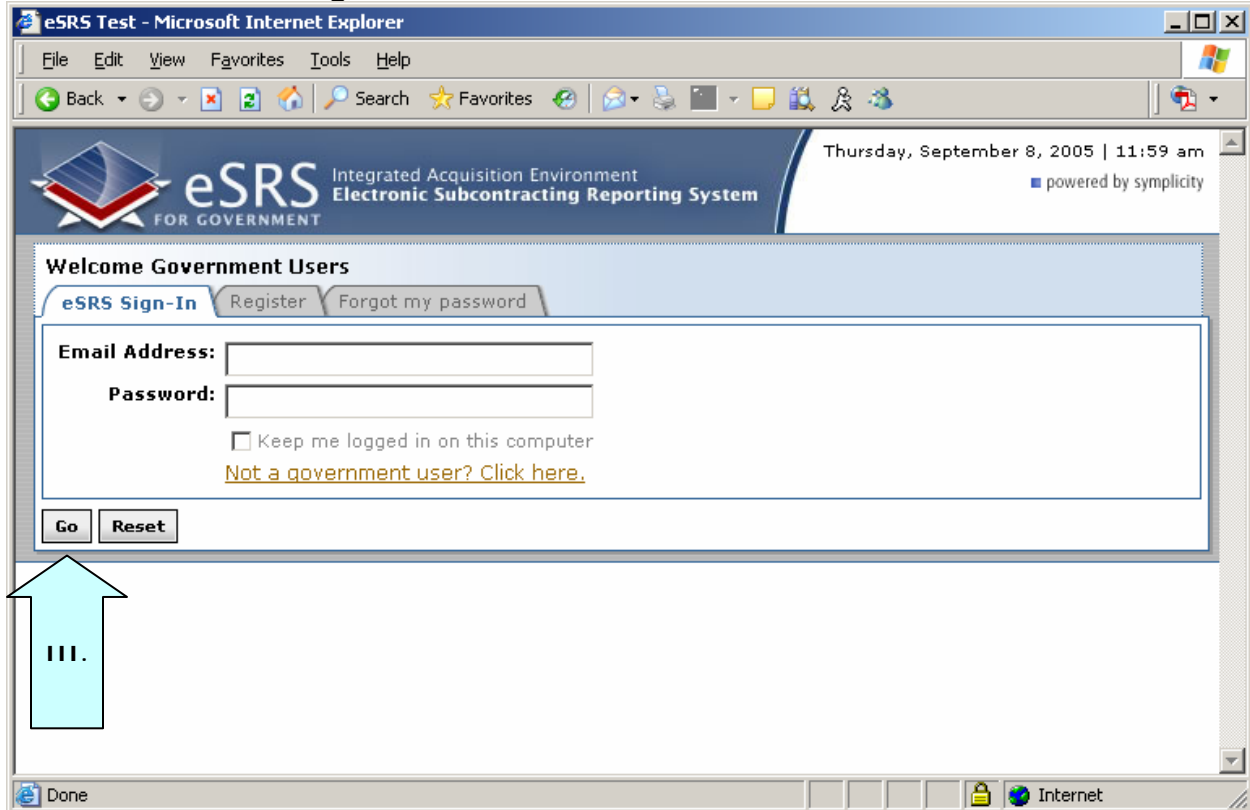
Section 1: Log-in to ESRS	3
1.1 Existing Users	3
1.2 New Users	3
Section 2: Home	4
Section 3: Reports	5
3.1 Individual	5
3.2 Summary	6
3.3 Year-End SDB	7
3.4 SDB Participation Report	8
3.5 Accept/Reject Report	9
Section 4: Reporting	10
5.1 Build New Reports	10
5.2 View Generated Report	12
5.3 View Existing Reports	13
Section 5: Contracts	14
5.1 Contract List	14
5.2 Delinquent Reports	14
Section 6: My Account	17
6.1 General Information	17
6.2 Change Password	17

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



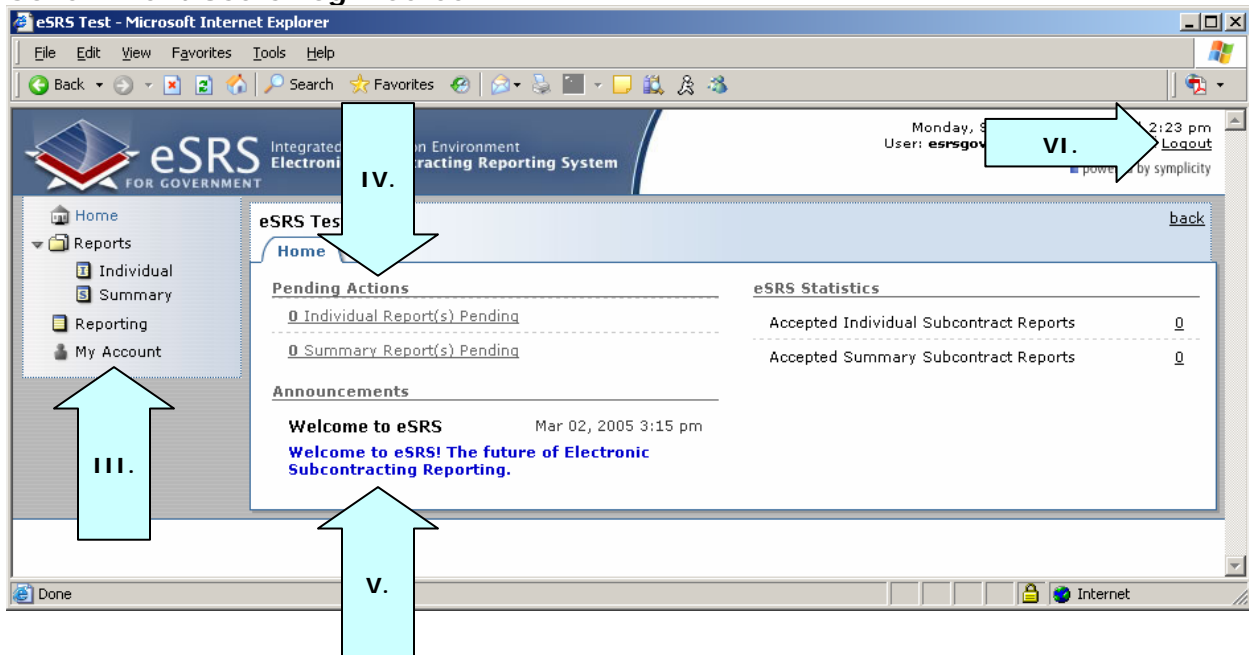
1.2 New Users

- 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

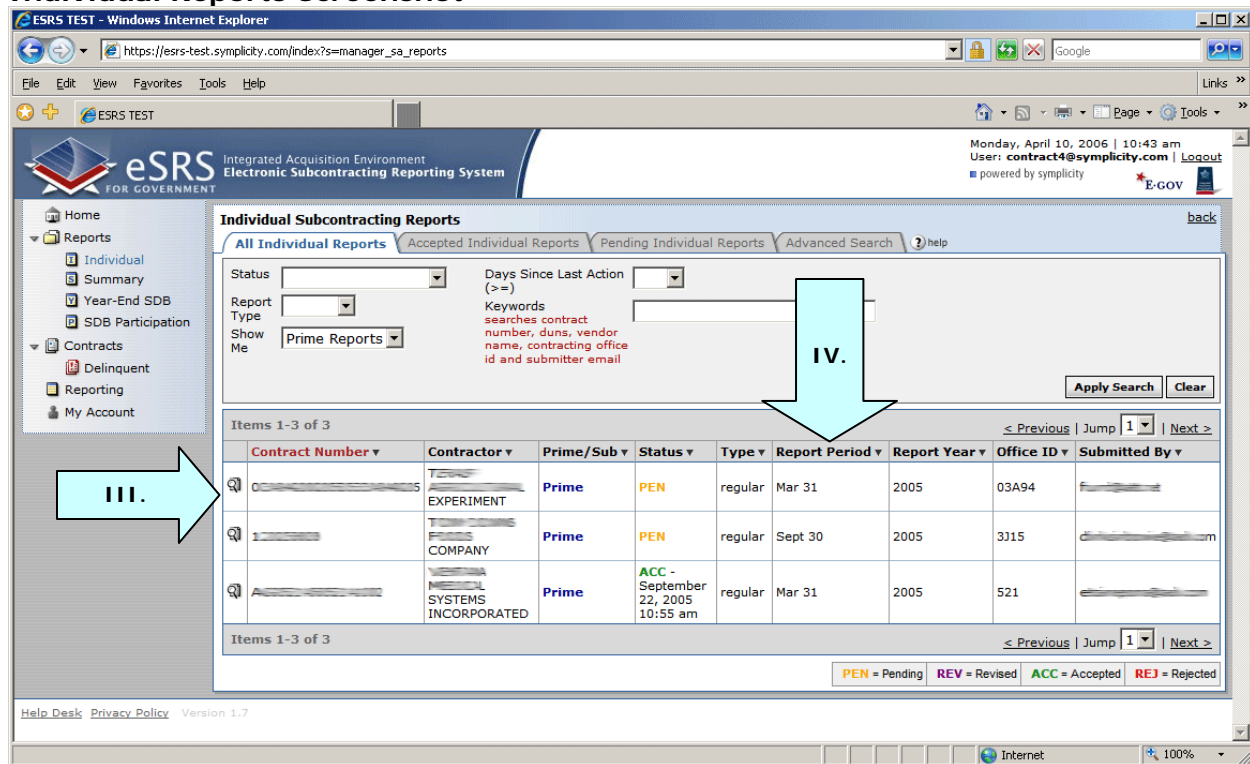


3. Reports

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' page in a Windows Internet Explorer browser. The page includes a navigation menu on the left with options like Home, Reports, Individual, Summary, Year-End SDB, SDB Participation, Contracts, Delinquent, Reporting, and My Account. The main content area features search filters for Status, Report Type (set to Prime Reports), and Keywords. A table lists three reports with the following data:

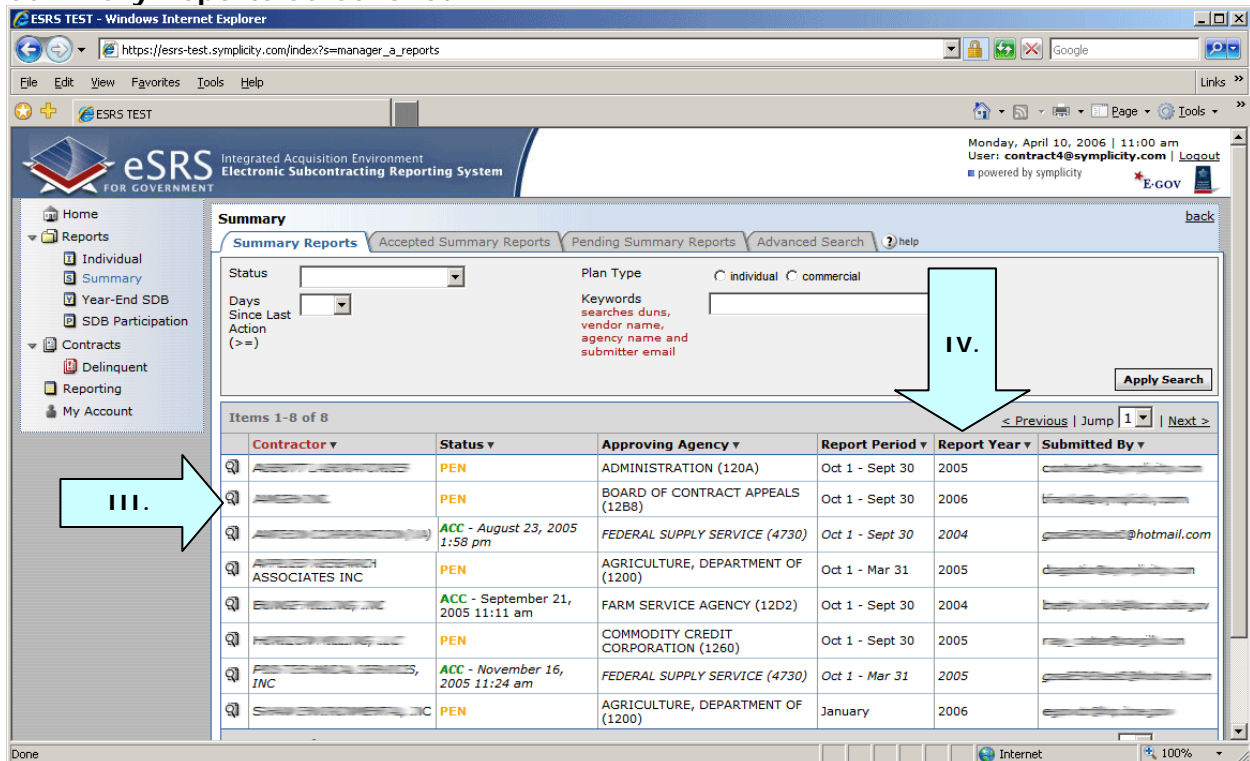
Contract Number	Contractor	Prime/Sub	Status	Type	Report Period	Report Year	Office ID	Submitted By
[REDACTED]	EXPERIMENT	Prime	PEN	regular	Mar 31	2005	03A94	[REDACTED]
[REDACTED]	COMPANY	Prime	PEN	regular	Sept 30	2005	3315	[REDACTED]
[REDACTED]	SYSTEMS INCORPORATED	Prime	ACC - September 22, 2005 10:55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

At the bottom of the page, a legend defines the status codes: PEN = Pending, REV = Revised, ACC = Accepted, and REJ = Rejected. The browser's address bar shows the URL: https://esrs-test.simplicity.com/index?s=manager_sa_reports.

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



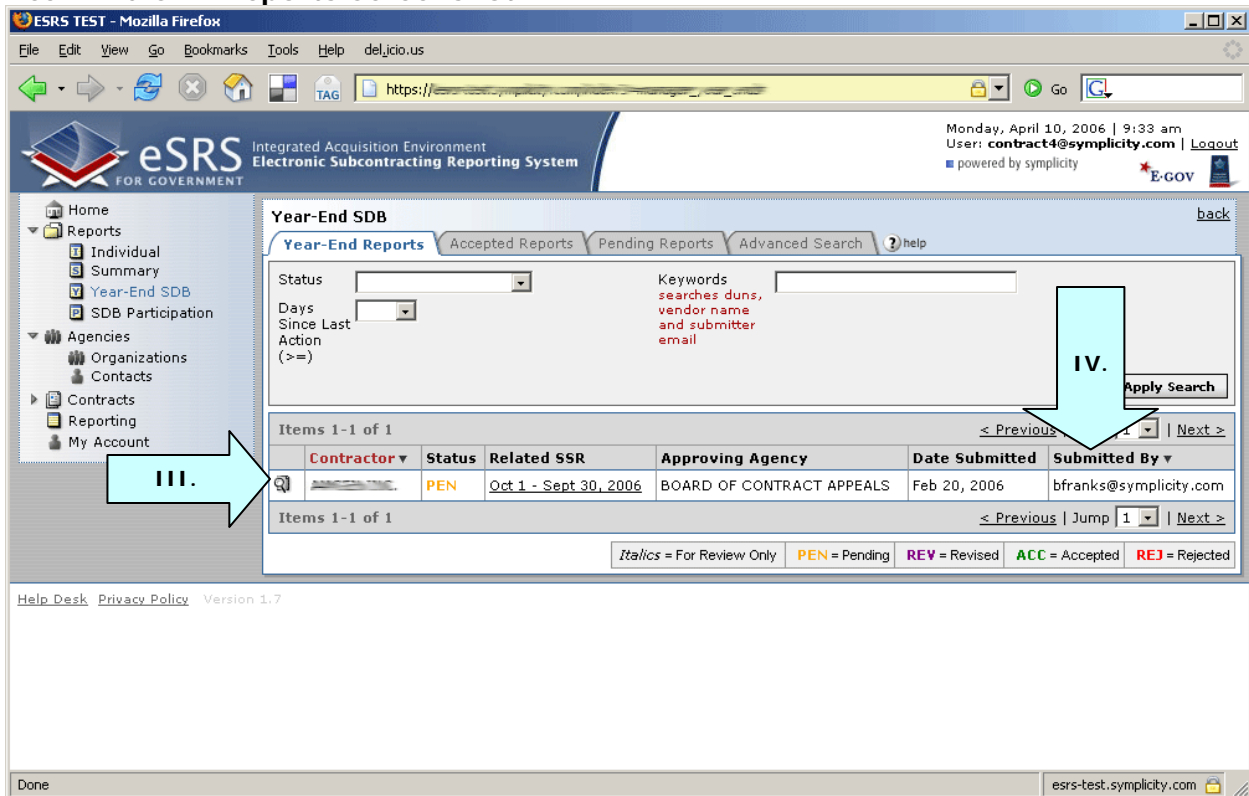
The screenshot displays the ESRS Summary Reports interface. On the left is a navigation menu with 'Reports' expanded to show 'Summary'. The main content area has search filters for Status, Plan Type, Days Since Last Action, and Keywords. Below the filters is a table of reports with columns: Contractor, Status, Approving Agency, Report Period, Report Year, and Submitted By. A red arrow labeled 'III.' points to a magnifying glass icon in the first row of the table. 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	[REDACTED]
[REDACTED]	PEN	BOARD OF CONTRACT APPEALS (12B8)	Oct 1 - Sept 30	2006	[REDACTED]
[REDACTED]	ACC - August 23, 2005 1:58 pm	FEDERAL SUPPLY SERVICE (4730)	Oct 1 - Sept 30	2004	[REDACTED]@hotmail.com
ASSOCIATES INC	PEN	AGRICULTURE, DEPARTMENT OF (1200)	Oct 1 - Mar 31	2005	[REDACTED]
[REDACTED]	ACC - September 21, 2005 11:11 am	FARM SERVICE AGENCY (12D2)	Oct 1 - Sept 30	2004	[REDACTED]
[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	[REDACTED]
[REDACTED]	PEN	AGRICULTURE, DEPARTMENT OF (1200)	January	2006	[REDACTED]

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://

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

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

Year-End SDB back

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

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

Items 1-1 of 1 < Previous | Next >

Contractor ▼	Status	Related SSR	Approving Agency	Date Submitted	Submitted By ▼
	PEN	Oct 1 - Sept 30, 2006	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

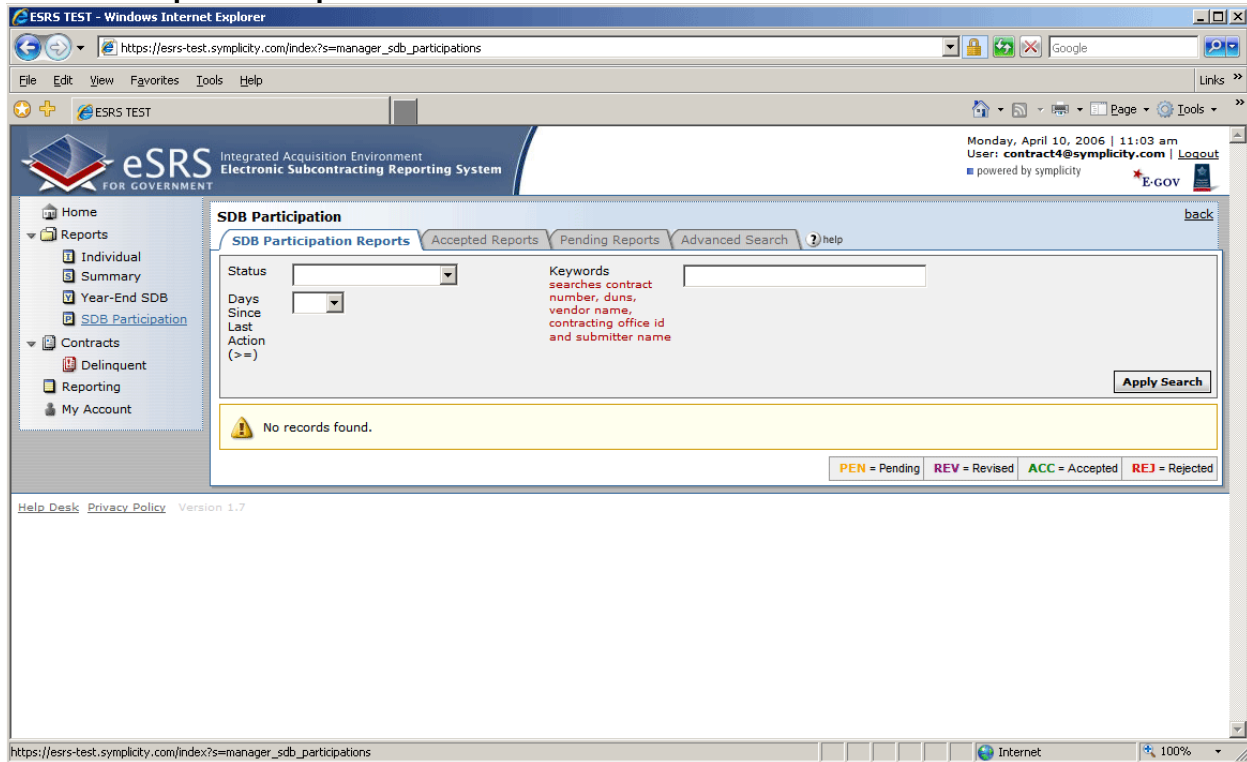
Help Desk Privacy Policy Version 1.7

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



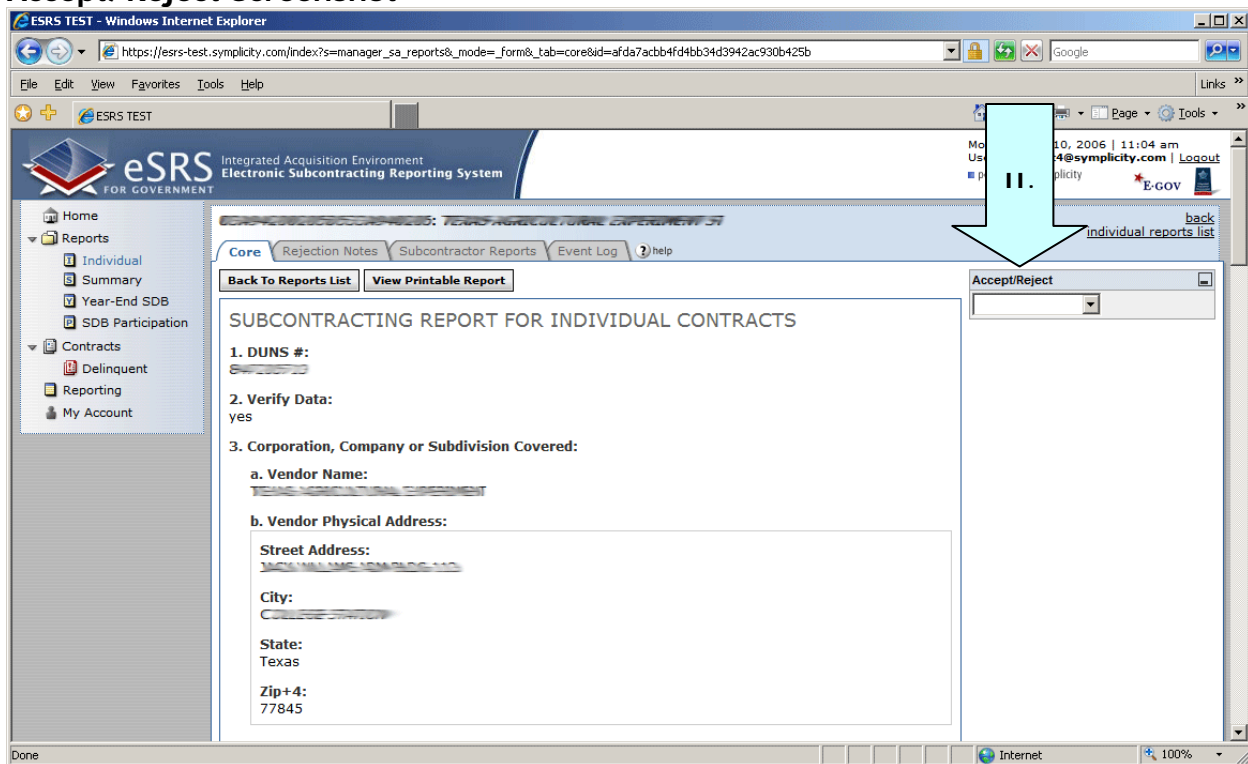
The screenshot displays the eSRS (Integrated Acquisition Environment Electronic Subcontracting Reporting System) interface. The browser window title is "ESRS TEST - Windows Internet Explorer". The address bar shows the URL: https://esrs-test.simplicity.com/index?s=manager_sdb_participations. The page content includes a navigation menu on the left with options like Home, Reports, Individual, Summary, Year-End SDB, SDB Participation, Contracts, Delinquent, Reporting, and My Account. The main content area is titled "SDB Participation" and features tabs for "SDB Participation Reports", "Accepted Reports", "Pending Reports", and "Advanced Search". Below the tabs are search filters: "Status" (dropdown), "Days Since Last Action (>=)" (dropdown), and "Keywords" (text input). A legend indicates that keywords search for contract number, duns, vendor name, contracting office id, and submitter name. An "Apply Search" button is present. A yellow warning box states "No records found." At the bottom right, a legend shows: PEN = Pending, REV = Revised, ACC = Accepted, REJ = Rejected. The page footer 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

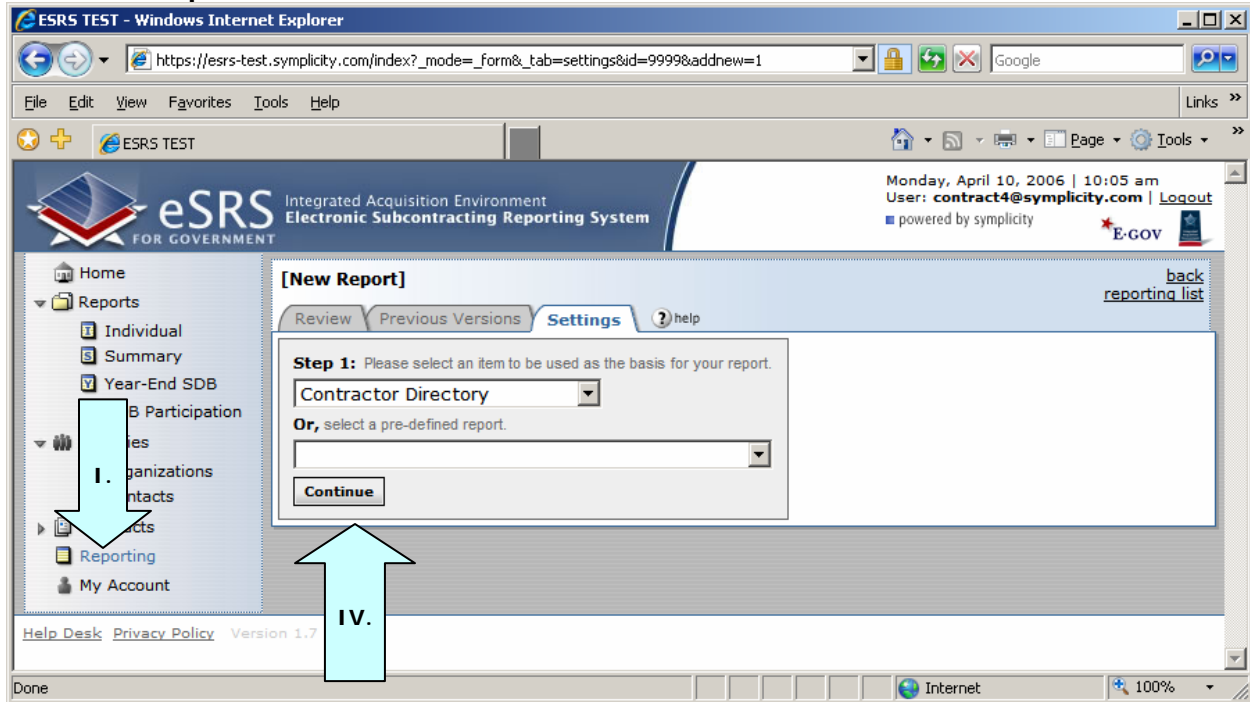


4. Reporting

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

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

[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

VI.

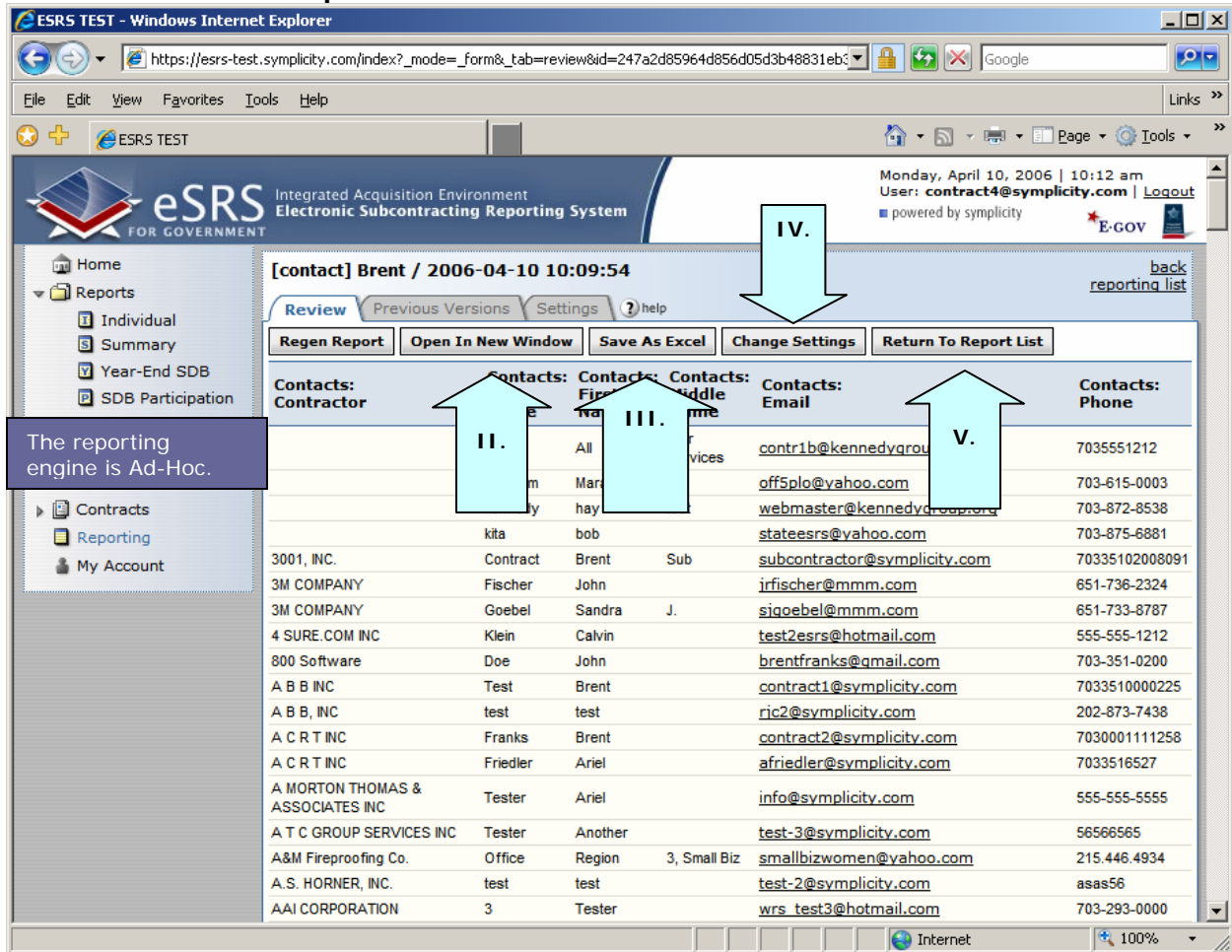
VIII.

X.

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

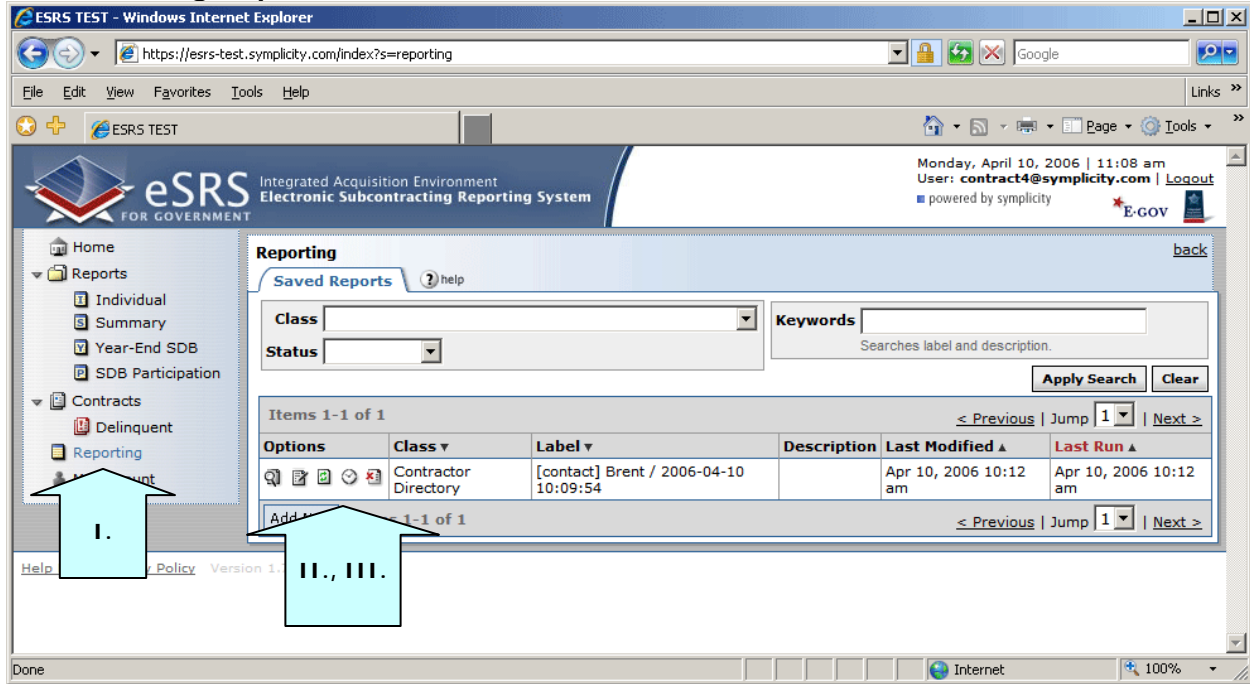
Regen Report Open In New Window Save As Excel Change Settings Return To Report List

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	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

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



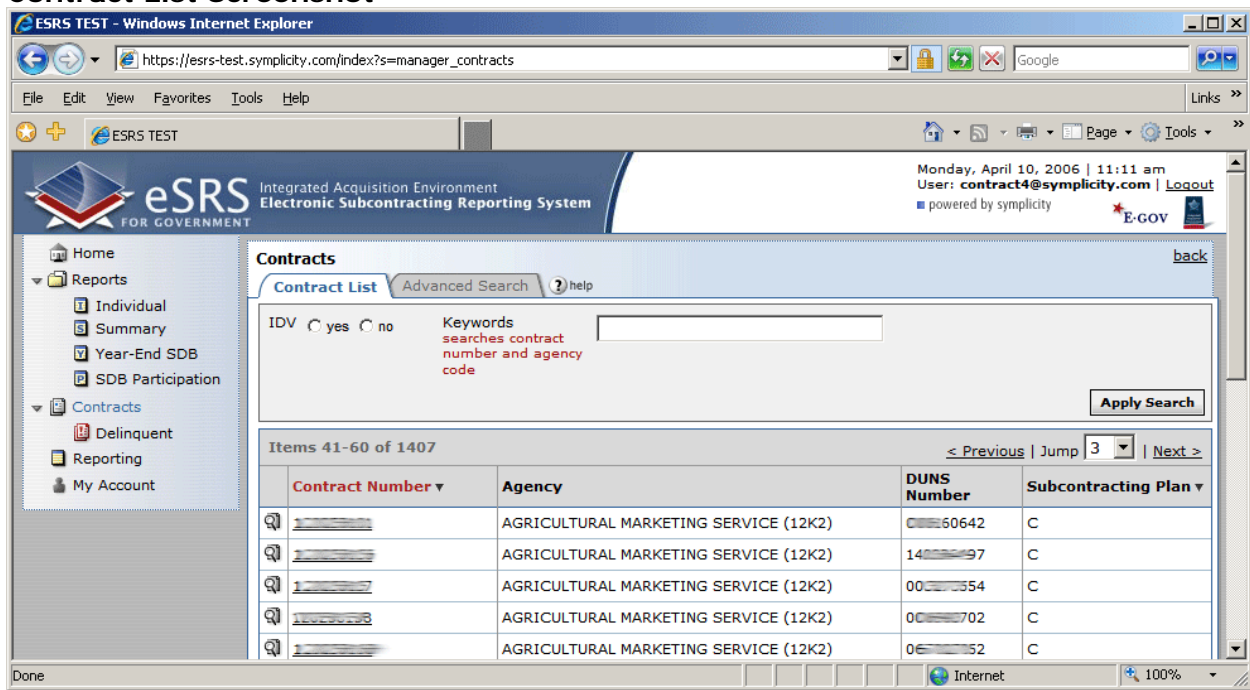
The screenshot shows the ESRS TEST application interface. The left navigation menu includes 'Home', 'Reports' (with sub-items: Individual, Summary, Year-End SDB, SDB Participation), 'Contracts' (with sub-items: Delinquent), and 'Reporting'. The 'Reporting' section is active, showing search filters for 'Class' and 'Status', and a 'Keywords' search box. Below the filters is a table of reports with columns: Options, Class, Label, Description, Last Modified, and Last Run. A single report is listed: 'Contractor Directory' with label '[contact] Brent / 2006-04-10 10:09:54', description 'Apr 10, 2006 10:12 am', and last run 'Apr 10, 2006 10:12 am'. A red arrow labeled 'I.' points to the 'Reporting' menu item, and another red arrow labeled 'II., III.' points to the report table.

5. Contracts

5.1 Contract List

- I. Click "Contracts" on the left hand navigation menu.
- II. You will be able to see all contracts associated to your agency and below.
- III. Click on the  or the **contract number** to review the details of the contract sent from FPDS-NG.
- IV. You may also search for contracts using the Keywords search feature near the top of the screen.

Contract List Screenshot








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

Contracts [back](#)

Contract List [Advanced Search](#) [? help](#)

IDV yes no Keywords
searches contract number and agency code

Items 41-60 of 1407 < Previous | Jump 3 | Next >

Contract Number	Agency	DUNS Number	Subcontracting Plan
 XXXXXXXXXX	AGRICULTURAL MARKETING SERVICE (12K2)	0000060642	C
 XXXXXXXXXX	AGRICULTURAL MARKETING SERVICE (12K2)	1400000097	C
 XXXXXXXXXX	AGRICULTURAL MARKETING SERVICE (12K2)	0000005554	C
 XXXXXXXXXX	AGRICULTURAL MARKETING SERVICE (12K2)	000000702	C
 XXXXXXXXXX	AGRICULTURAL MARKETING SERVICE (12K2)	000000052	C

5.1 Delinquent Reports List

- I. Click "Contracts" on the left hand navigation menu.
- II. Click on Delinquent underneath Contracts.
- III. This list will contain all contracts that have previously had a report filed. Once a report period completes, if no report has been filed for a contract which no "Final" report was submitted, will appear in this list.
- IV. This will only show Contracts that have delinquent ISR's.

6. My Account

6.1 General Information

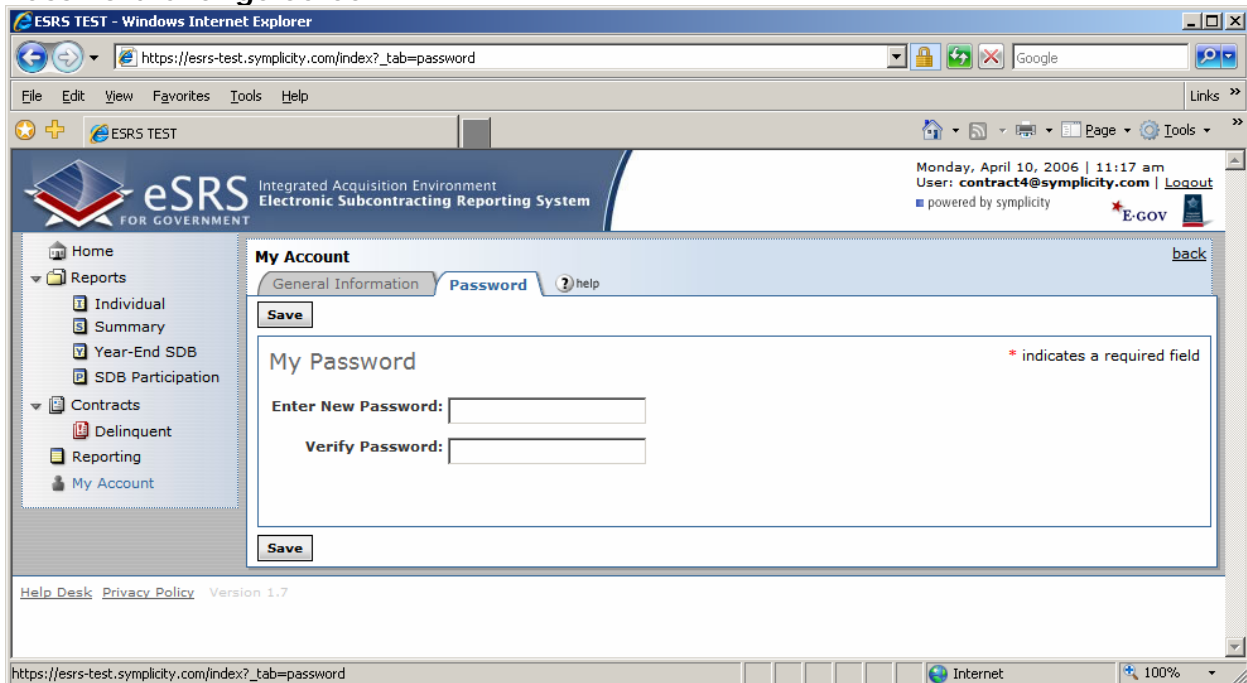
My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

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

6.2 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 Participation
 Contracts
 Delinquent
 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.symplicity.com/index?_tab=password