

# **Electronic Subcontracting Reporting System (ESRS) Agency Coordinator Guide 2.0**

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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

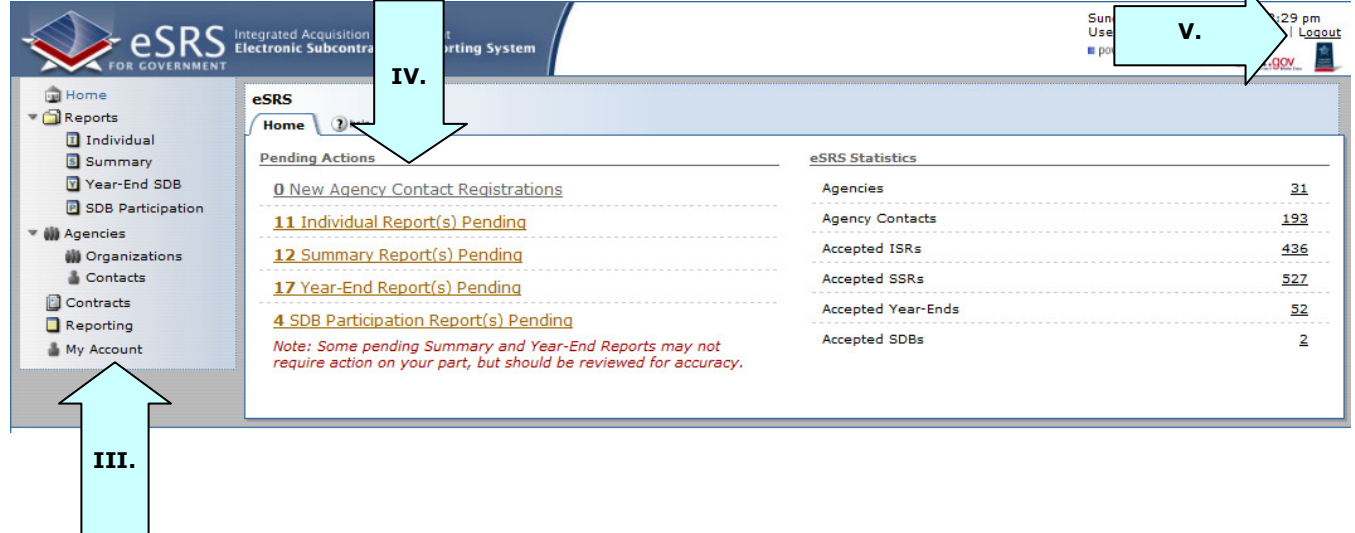
- I. Point your browser to <https://www.esrs.gov/government/>
- II. Click on the "Register" tab.
- III. Select your Agency.
- IV. Complete the forms, clicking continue after you have completed each section.
- V. At the last step, please review the information, and when ready click "Submit Registration"
- 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 Register 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 Homepage




The screenshot shows the eSRS Government Users Homepage. The navigation menu on the left (callout III) includes Home, Reports (Individual, Summary, Year-End SDB, SDB Participation), Agencies (Organizations, Contacts), Contracts, Reporting, and My Account. The main content area (callout IV) displays Pending Actions: 0 New Agency Contact Registrations, 11 Individual Report(s) Pending, 12 Summary Report(s) Pending, 17 Year-End Report(s) Pending, and 4 SDB Participation Report(s) Pending. A note states: "Note: Some pending Summary and Year-End Reports may not require action on your part, but should be reviewed for accuracy." The eSRS Statistics table (callout V) is as follows:

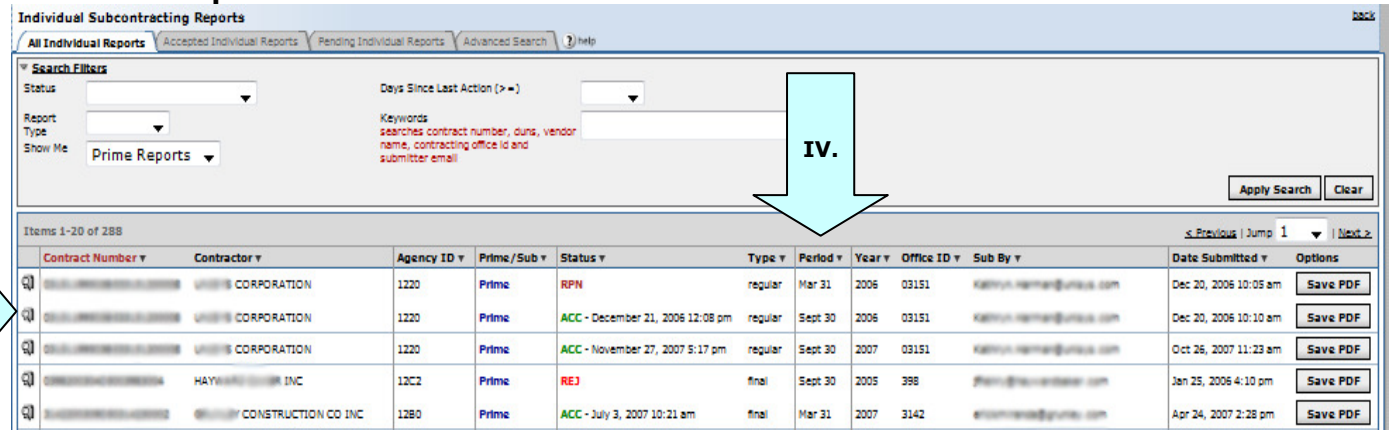
eSRS Statistics	
Agencies	31
Agency Contacts	193
Accepted ISRs	436
Accepted SSRs	527
Accepted Year-Ends	52
Accepted SDBs	2

### 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 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 are search filters for Status, Report Type, and Show Me (set to 'Prime Reports'). A table displays a list of reports with columns: Contract Number, Contractor, Agency ID, Prime/Sub, Status, Type, Period, Year, Office ID, Sub By, Date Submitted, and Options. A red arrow labeled 'III.' points to the magnifying glass icon next to the first report. A blue arrow labeled 'IV.' points to the 'Contract Number' column header.

Contract Number	Contractor	Agency ID	Prime/Sub	Status	Type	Period	Year	Office ID	Sub By	Date Submitted	Options
00000000000000000000	UNIBS CORPORATION	1220	Prime	RPN	regular	Mar 31	2006	03151	Katrina.Neman@unib.com	Dec 20, 2006 10:05 am	Save PDF
00000000000000000000	UNIBS CORPORATION	1220	Prime	ACC - December 21, 2006 12:08 pm	regular	Sept 30	2006	03151	Katrina.Neman@unib.com	Dec 20, 2006 10:10 am	Save PDF
00000000000000000000	UNIBS CORPORATION	1220	Prime	ACC - November 27, 2007 5:17 pm	regular	Sept 30	2007	03151	Katrina.Neman@unib.com	Oct 26, 2007 11:23 am	Save PDF
00000000000000000000	HAYWARD GROUP INC	12C2	Prime	REJ	final	Sept 30	2005	398	JH@hsgroup.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	en@conco.com	Apr 24, 2007 2:28 pm	Save PDF

#### 3.1.1 Agency Contract Transfers


- I. Agencies have the ability to transfer a contract from one agency/office to another agency/office in FPDS-NG.
- II. When a contract is transferred to a new agency/office in FPDS-NG, ALL reports in the eSRS that were created PRIOR to the transfer, regardless of status (Draft, Pending, Accepted, Rejected, Reopened), will remain associated to the former agency/office (the contract agency/office at the time of report creation).
- III. When a contract is transferred in FPDS-NG, the former agency/office will NOT have access to any new reports created in the eSRS AFTER the transfer took place.
- IV. When a contract is transferred in FPDS-NG, the new agency/office on the contract will have read-only access to the most recent report submitted in eSRS prior to the transfer (i.e., submitted to the former contract agency/office), regardless of status.

#### 3.1.2 Contract PIID Changes

- I. Agencies have the ability to modify PIID/Contract numbers in FPDS-NG.
- II. The eSRS will receive modified PIID/Contract numbers from FPDS-NG via the nightly web service call.

- III. The eSRS will perform a silent, nightly update of all existing reports, regardless of status, with the modified PIID/Contract number. This process will overwrite the original PIID/Contract number on the report.
- IV. When a PIID/Contract number is modified, the eSRS will display a new field from FPDS-NG labeled "Other Award (or IDV) ID" which will identify the original PIID/Contract number for reference.
- V. The original PIID/Contract number will no longer be searchable in the eSRS.

### 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 shows the eSRS Summary Reports interface. On the left is a navigation menu with 'Reports' > 'Summary' selected. The main area has tabs for 'Summary Reports', 'Accepted Summary Reports', 'Pending Summary Reports', and 'Advanced Search'. Below the tabs are search filters for Status, Days Since Last Action, Plan Type, and Keywords. A table displays a list of reports with columns for Contractor, Status, Approving Agency, Report Period, Report Year, Submitted By, and Options. A red arrow labeled 'III.' points to the 'View' icon in the first row of the table. A blue arrow labeled 'IV.' points to the 'Status' column header in the table.

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_pch@b...com	Save PDF
AMT ASSOCIATES INC	ACC - March 16, 2006 1:55 pm	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2005	hally_pch@b...com	Save PDF
AMT ASSOCIATES INC	ACC - August 15, 2007 8:28 am	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2006	hally_pch@b...com	Save PDF
AMT ASSOCIATES INC	ACC - December 12, 2007 1:23 pm	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2007	hally_pch@b...com	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.

#### 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


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

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 >

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

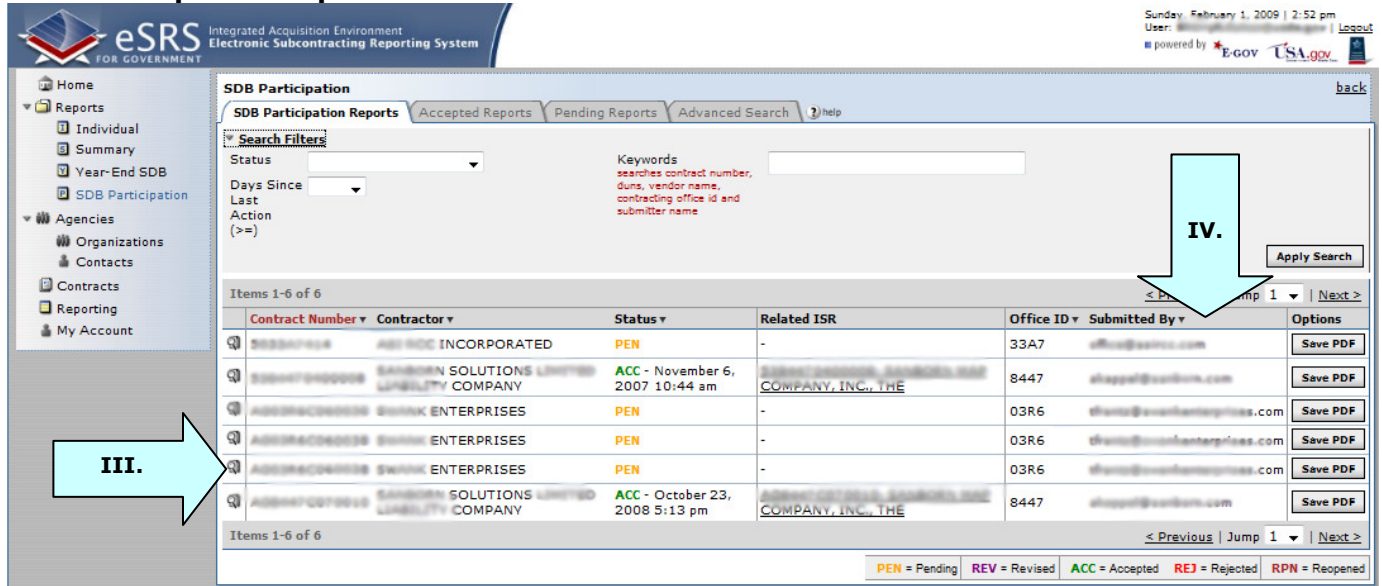
Done esrs-test.simplicity.com



### 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 main content area is titled "SDB Participation" and includes tabs for "SDB Participation Reports", "Accepted Reports", "Pending Reports", and "Advanced Search". Below the tabs are search filters for Status, Days Since, Last Action, and Keywords. A table lists six items with columns for Contract Number, Contractor, Status, Related ISR, Office ID, Submitted By, and Options. A legend at the bottom identifies status codes: PEN = Pending, REV = Revised, ACC = Accepted, REJ = Rejected, RPN = Reopened.

Contract Number	Contractor	Status	Related ISR	Office ID	Submitted By	Options
503530004	ADRIEC INCORPORATED	PEN	-	33A7	af@adriec.com	Save PDF
50353000008	SANBORN SOLUTIONS LIMITED LIABILITY COMPANY	ACC - November 6, 2007 10:44 am	50353000008 SANBORN SOLUTIONS LIMITED LIABILITY COMPANY, INC., THE	8447	shappel@sanborn.com	Save PDF
40303000008	SWANK ENTERPRISES	PEN	-	03R6	shank@swankenterprises.com	Save PDF
40303000008	SWANK ENTERPRISES	PEN	-	03R6	shank@swankenterprises.com	Save PDF
40303000008	SWANK ENTERPRISES	PEN	-	03R6	shank@swankenterprises.com	Save PDF
40303000008	SANBORN SOLUTIONS LIMITED LIABILITY COMPANY	ACC - October 23, 2008 5:13 pm	40303000008 SANBORN SOLUTIONS LIMITED LIABILITY COMPANY, INC., THE	8447	shappel@sanborn.com	Save PDF

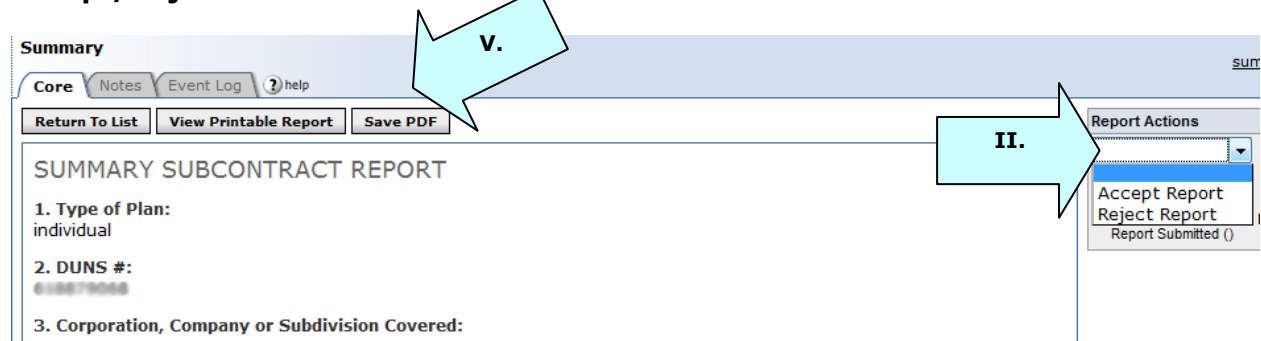


### 3.5 Accept / Reject (No Administering Agency Designated on Report)

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.

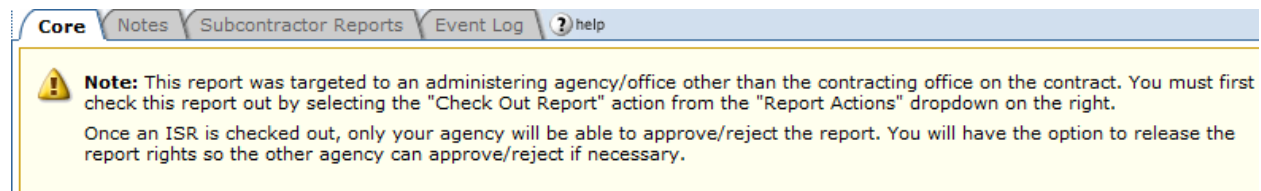
#### Accept/Reject Screenshot



### 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.

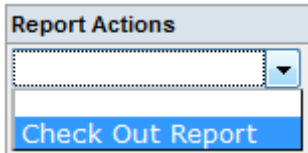
The first step is to go to the Individual Reports section. Click on the "Pending" tab near the top of the screen, and find the report that you would like to manage. If a report has an Administering Agency selected, a note will display at the top of the report advising of the status.



**NOTE:** In order to Accept/Reject a report that has an Administering Agency, the "Check Out" function must be available. If the "Check Out Report" action is not available, you will need to request that the report be released by the agency who currently has the report checked out.


**3.6.1 Accept/Reject**

- 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) and click the "Go" button. **Note:** If you check out the report, only your agency/office will have accept/reject rights for the report. If you check out the report, the action will be tracked in the right hand "Action History" sidebar for both involved agencies to view.



**Note:** If you are registered at a level above both the Contracting Office on the contract AND the designated Administering Agency in the report, you will be required to select the Agency/Office for which you are checking out the report. **Example:** The Contracting Office on the report is AFRL and the report is submitted to AFMC as the Administering Agency. If the person reviewing (checking out) the report is registered at the parent agency level Air Force (level above sub agency), you must select the agency you are representing at the time of check out (AFMC or AFRL).

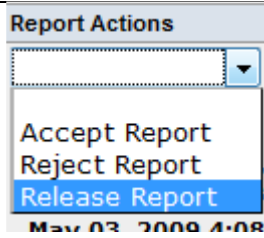
**Choose Agency** ✕

 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

- III. 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 by clicking on the appropriate action. A notification box will appear to allow you to enter a note for the report that will be viewable by all parties reviewing the report. **Note:** If you "Reject" a report you are required to provide a notification as to why.



- IV. Click "Submit" to finalize the action.
- V. You may view a printable report or, save as PDF, or return to the reports list by selecting the appropriate button at the top of the core report page.
- VI. 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.

**3.6.2 Request to Release a Report**

- I. Click on the View Icon beside the desired report.
- II. 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.

2.6 A red "x" will display next to the agency that does NOT have the report checked out.

2.7 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	✔

- III. If the report is already checked out by the other agency involved, you may request access by clicking on the link "click here to send email" located at the top of the report within the "Note".

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](#)

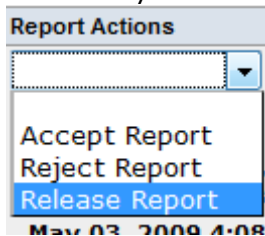
After clicking on the "click here to send email" link, your email client will generate a new email message with the "To" and "Subject" fields pre-populated. The email will be sent to the agency user who currently has the report checked out with the subject "Request Access to ISR Report."

- IV. You may also request access to a report by clicking on the "request access" button found in the "Report Rights" box.

Report Rights		
Contracting Office Agency	AIR FORCE RESEARCH LABORATORY (AFRL) - GS03	✓
Admin Agency	CCE (CCE) - W91WAW	✗
<input type="button" value="request access"/>		



### 3.6.3 Release a 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.

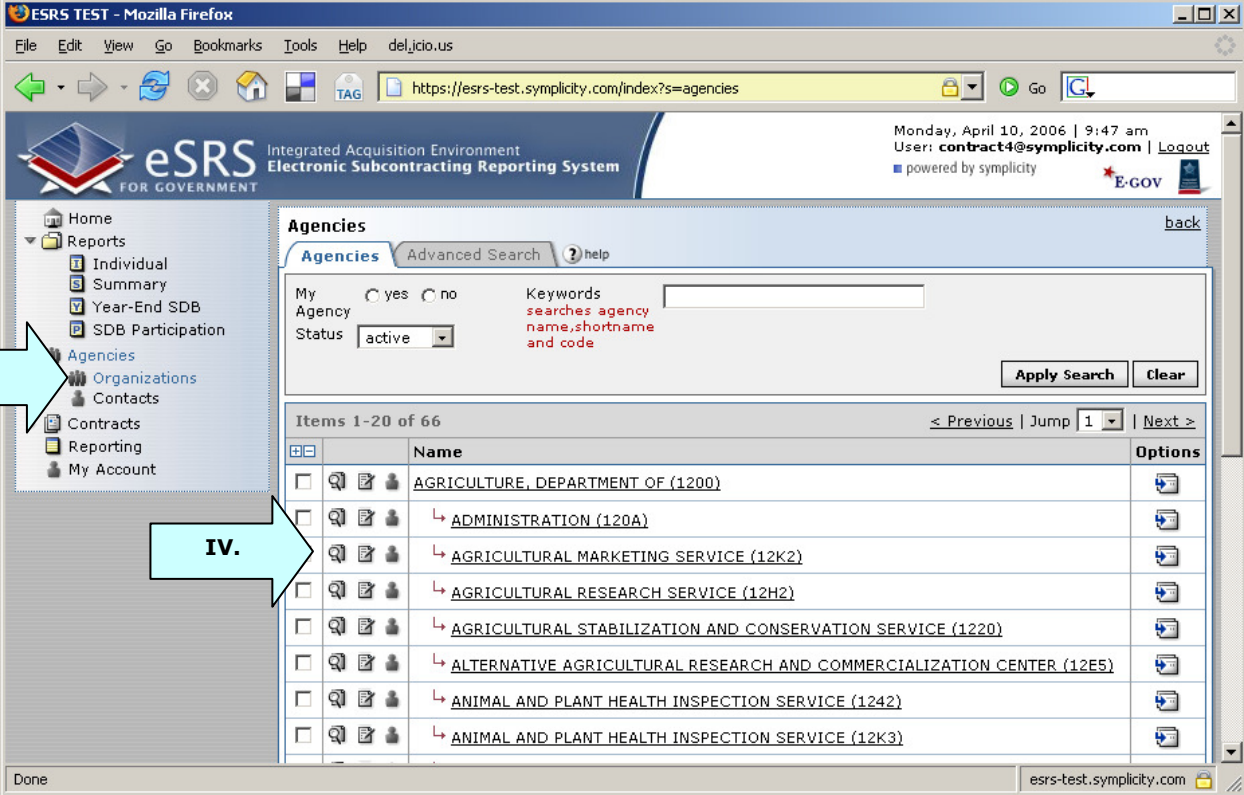


## 4. Agencies (Organizations)

### 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 agency/organization to see more information pertaining to that specific agency/organization.
- 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 URL is "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, Contacts, Contracts, Reporting, and My Account. A red arrow labeled "II." points to the "Organizations" link.



The main content area is titled "Agencies" and includes a search filter for "My Agency" (yes/no) and "Status" (active). A search box contains "Keywords" and "searches agency name,shortname and code". The "Apply Search" and "Clear" buttons are visible.

The table below shows a list of agencies with columns for "Name" and "Options". A red arrow labeled "IV." points to the "View" icon in the first row of the table.

	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 Manage Agency Contacts**

**4.2.1 View Your Agency 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 and the Contacts for this agency will appear.
- IV. Click on the View icon  beside the desired contact to review his/her Contact Information, including Core profile (name, email), Roles, and Account details.

DEPT OF DEFENSE (9700) [agenci](#)

Core **Contacts** Reports Office Codes ? help

▼ Search Filters

Permission Level  Hide Children  yes  no

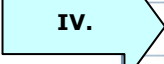
User Level  Keywords

**Apply Sea**

---

Batch Options ▾ Items 1-10 of 10 < Previous | Jump 1 ▾ | Ne

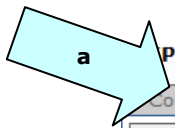
<input type="checkbox"/>			Last Name ▾	First Name ▾	Agency	Office	Title	Email ▾	Phone
<input type="checkbox"/>			Benoit	Robert	DEPT OF DEFENSE (9700)		IVV Tester	<a href="mailto:robert_benoit@yahoo.com">robert_benoit@yahoo.com</a>	
<input type="checkbox"/>			hkennedy	hkennedy	DEPT OF DEFENSE (9700)		DoD AC	<a href="mailto:yvite@kennedygroup.org">yvite@kennedygroup.org</a>	
<input type="checkbox"/>			Jones	John	DEPT OF DEFENSE (9700) DEPT OF THE NAVY (1700)			<a href="mailto:bjbenoit@erssystems.com">bjbenoit@erssystems.com</a>	
<input type="checkbox"/>			kenedy	havward	DEPT OF DEFENSE (9700)		QA	<a href="mailto:havward.kenedy@usa.gov">havward.kenedy@usa.gov</a>	
<input type="checkbox"/>			Ames	Geoffrey	AFMC (AFMC) AIR FORCE RESEARCH LABORATORY (AFRL) CCE (CCE) DEPT OF DEFENSE (9700)	GS03 FA8104 W91WAW	DoD Tester	<a href="mailto:GEOFFREY.AMES@TA.MIL">GEOFFREY.AMES@TA.MIL</a>	703.607.



IV.

Note: You can also view contacts by Office:

- a) Click on "search filters"
- b) Select "contracting office" in the "User Level" drop-down within the Search Filters section.
- c) A new drop-down box will appear called "Contracting Office."
- d) Select the desired Office and click "Apply Search" button.



a

DEPT OF DEFENSE (9700) [back](#)  
[agencies list](#)

Core **Contacts** Reports Office Codes ? help

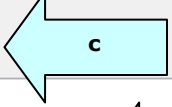
▼ Search Filters

Contracting Office  Hide Children  yes  no

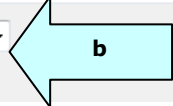
Permission Level  Keywords

User Level

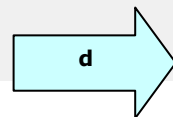
**Apply Search** **Clear**



c



b



d

**4.2.1.1 Group List By**

- I. There are two viewing options for the Agency Contacts list: Group By User or Group By Accounts. You can alternate views by clicking on the desired link. Note: The current view will be the one that is not underlined.

**Apply Search**

**Group List By:** [By User](#) | [By Accounts](#)

Jump **1** | [Next >](#)

- II. The "Group List By User" option will display each user in one row of the main list. This means that if a user is registered under multiple agencies, that user will be listed once with all associated agencies listed in a single field. When in this view, you will not be able to sort by Agency or Office.

**Group List By: By User**

Batch Options ▾ Items 1-20 of 38 Jump 1

<input type="checkbox"/>	<input type="checkbox"/>	Last Name ▾	First Name ▾	Agency	Title ▲	Email ▲	PI
<input type="checkbox"/>	<input type="checkbox"/>	Account	Test			.....com	
<input type="checkbox"/>	<input type="checkbox"/>	.....	.....	AFMC (AFMC) AIR FORCE RESEARCH LABORATORY (AFRL) CCE (CCE) DEPT OF DEFENSE (9700)	DoD Tester	GE.....BTA.MIL	70
<input type="checkbox"/>	<input type="checkbox"/>	.....	.....	USACE (USACE)		.....ahoo.com	
<input type="checkbox"/>	<input type="checkbox"/>	.....	.....	SMALL BUSINESS ADMINISTRATION (7300)		.....ail.com	

- III. The "Group List By Accounts" option will display each account in one row of the main list. This means that if a user has multiple accounts or "hats" associated with their user registration, each account will be listed in its own row. When in this view, you will be able to sort by Agency or Office.

**4.2.1.2 Batch Options: Mail**

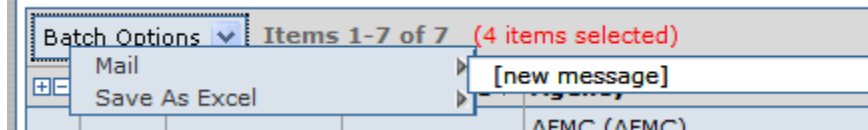
- I. Use the checkbox feature to select the desired contacts. Or, use the  to select ALL or deselect ALL contacts.

Batch Options ▾ Items 1-7 of 7 (4 items selected)

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Name ▾	First Name ▾	Agency
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.....	.....	AFMC (AFMC) AIR FORCE RES CCE (CCE)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.....	Stephen	PUBLIC BUILDI
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.....	Michael	A Test Agency

- II. After selecting the desired contacts, you can send an email message to all by selecting Batch Options -> Mail -> [new message].





- III. The Mail Wizard tab will display for you to create the details/parameters for your batch mail message. Complete all required fields and click "next" to continue.

**Contacts** back

Agency Contacts | New Agency Contact Registrations | **Mail Wizard** | help

**STEP 1: Review/Edit Message**  
Please review/set the parameters of the message you wish to send. Make any changes in the form below, select whether and how you wish to save these changes, and then select the 'next' button.

**Message Identifier:** Please enter an identifier for this message

**Subject\*:** Enter the subject of the email message.

**From\*:** Please enter the e-mail address which will be used in the from field.

**Cc:** Address(es) who should be carbon copied

**Bcc:** Address(es) who should be blind copied

**HTML Format:** Do you wish to format this message using HTML?  
 yes  no

**Message Body\*:** Please enter the message body, including any substitution fields

**AVAILABLE FIELDS**

[fullname]  
 [fname]  
 [mi]  
 [lname]  
 [phone]  
 [fax]  
 [email]  
 [password]  
 [date]  
 [tab]

**Please note:** Use of the [password] field will result in the login password being reset and a new password generated for all contacts receiving this email.

- IV. Review the list of recipients and make any desired changes to the list.
- V. Click "Prev" to return to Step 1.
- VI. Click "Cancel" to stop the action.
- VII. Click "Send Messages" to begin the mailing process.

**Contacts** back

Agency Contacts | New Agency Contact Registrations | **Mail Wizard** | help

**STEP 2: Review Recipients**  
Please review the list of recipients below, and make any desired changes.

GE...BTA.MIL  
 ...comcast.net  
 ...simplicity.com

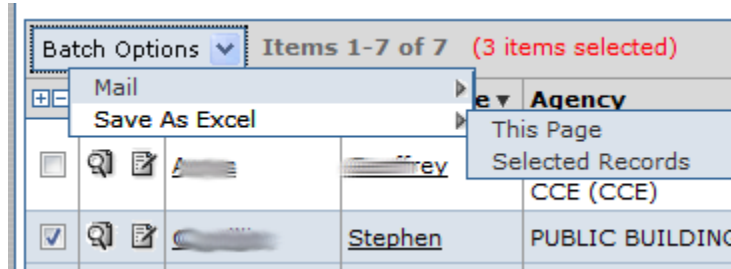
Remove Selected Recipients

**WARNING:** When you click 'Send Messages', the mailing will begin. This is your last chance to change your mind or make any corrections.

Cancel Prev Send Messages

**4.2.1.3 Batch Options: Save As Excel**

- I. Use the checkbox feature to select the desired contacts. Or, use the to select ALL or deselect ALL contacts.
- II. After selecting the desired contacts, you can save the list as an excel file by clicking Batch Options -> Save As Excel -> Selected Records. A pop-up will appear with the option to open the file or save the file.
- III. You can also save an entire page as an excel file without having to select specific contacts by clicking Batch Options -> Save As Excel -> This Page. A pop-up will appear with the option to open the file or save the file.



**4.2.2 Edit Your Agency 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, and the Contacts for this agency will appear.
- IV. Click the Edit Icon beside the contact you wish to edit. **Note: You will only be able to edit contacts registered at your level in the hierarchy and below.**

DEPT OF DEFENSE (9700) agency

Core **Contacts** Reports Office Codes ? help

▼ Search Filters  
 Permission Level:   
 User Level:   
 Hide Children:  yes  no  
 Keywords:   
 Apply Search

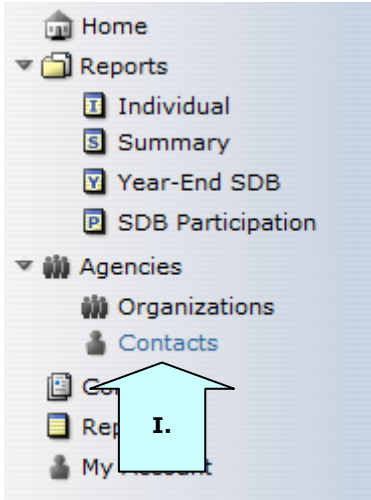
Batch Options ▼ Items 1-10 of 10 < Previous | Jump 1 | Next

	Last Name ▼	First Name ▼	Agency	Office	Title	Email ▼	Phone
<input type="checkbox"/>	Benoit	Robert	DEPT OF DEFENSE (9700)		IVV Tester	ro_benoit@yahoo.com	
<input type="checkbox"/>	hkennedy	hkennedy	DEPT OF DEFENSE (9700)		DoD AC	yanis@kennedygroup.org	
<input type="checkbox"/>	Jones	John	DEPT OF DEFENSE (9700) DEPT OF THE NAVY (1700)			bbenoit@arsystems.com	
<input type="checkbox"/>	hkennedy	hayward	DEPT OF DEFENSE (9700)		QA	hayward.kennedy@ars.gov	
<input type="checkbox"/>	Ames	Geoffrey	AFMC (AFMC) AIR FORCE RESEARCH LABORATORY (AFRL) CCE (CCE) DEPT OF DEFENSE (9700)	GS03 FA8104 W91WAW	DoD Tester	GEOFFREY.AMES.CT@STA.MIL	703.607.

IV.

### 4.2.3 View All Agency Contacts

- I. Click on "Contacts" from the left-hand navigation menu.



- II. The list will default to ALL registered government users, however, you can use the Search Filters to refine the list by Agency, Permission Level (Account Type), User Level (agency or contracting office) and/or Keywords (e.g., name, email).
- III. Click on the icon or the Name of the desired contact to view details.
- IV. Click on a desired email address to have your email client generate a new message with the "To" field pre-populated.
- V. You can sort any columns with a black arrow in the header.


**Note: See section 4.2.1.1 for details on the Group List By User and Group List by Accounts options.**

The screenshot shows the 'Agency Contacts' interface. At the top, there are tabs for 'Agency Contacts' and 'New Agency Contact Registrations'. Below this is a 'Search Filters' section with dropdown menus for 'Agency', 'Permission Level', 'User Level', and a text field for 'Keywords'. An 'Apply Search' button is at the bottom right of the filters. Below the filters is a table with columns: Last Name, First Name, Agency, Office, Title, Email, and Phone. The table contains three rows of contact information. Annotations are placed over the interface: 'II.' points to the 'Apply Search' button; 'III.' points to the magnifying glass icon in the first row; 'IV.' points to the email address in the third row; 'V.' points to the 'Agency' column header.

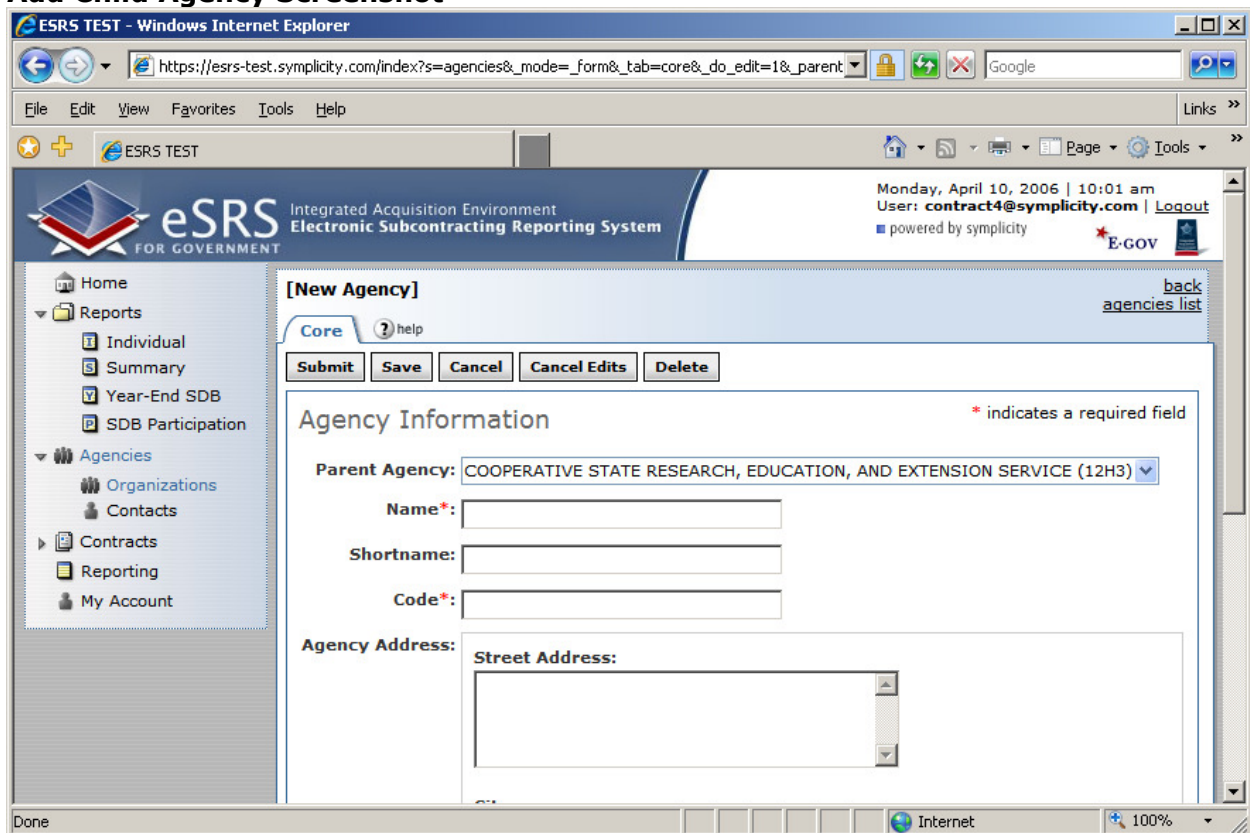
Last Name	First Name	Agency	Office	Title	Email	Phone
Account	Test				@yaoo.com	
		ACE (USACE)			@ahoo.com	
		AFMC (AFMC) AIR FORCE RESEARCH LABORATORY (AFRL) CCE (CCE) DEPT OF DEFENSE (9700)	GS03 FA8104 W91WAW	DoD Tester	R@BTA.MIL	703.607.1549

### 4.3 Add New Child Agency

**Important Note!** ISR's will not be routed to any child agencies that you create. When a Contract is imported to the eSRS to a new agency that was not in the eSRS, the agency will automatically be created. Only create a child agency if you wish to create an Agency that can only see/accept/reject SSR reports.

- I. Click on "Agencies" on the left hand navigation menu.
- II. Click on "Organizations" under Agencies.
- III. Click on the  Add New Child button next to the parent agency.
- IV. You should now see a screen similar to the "Add Child Agency Screenshot" below.
- V. Populate the fields.
- VI. Click "Submit" when you are finished.

#### Add Child Agency Screenshot

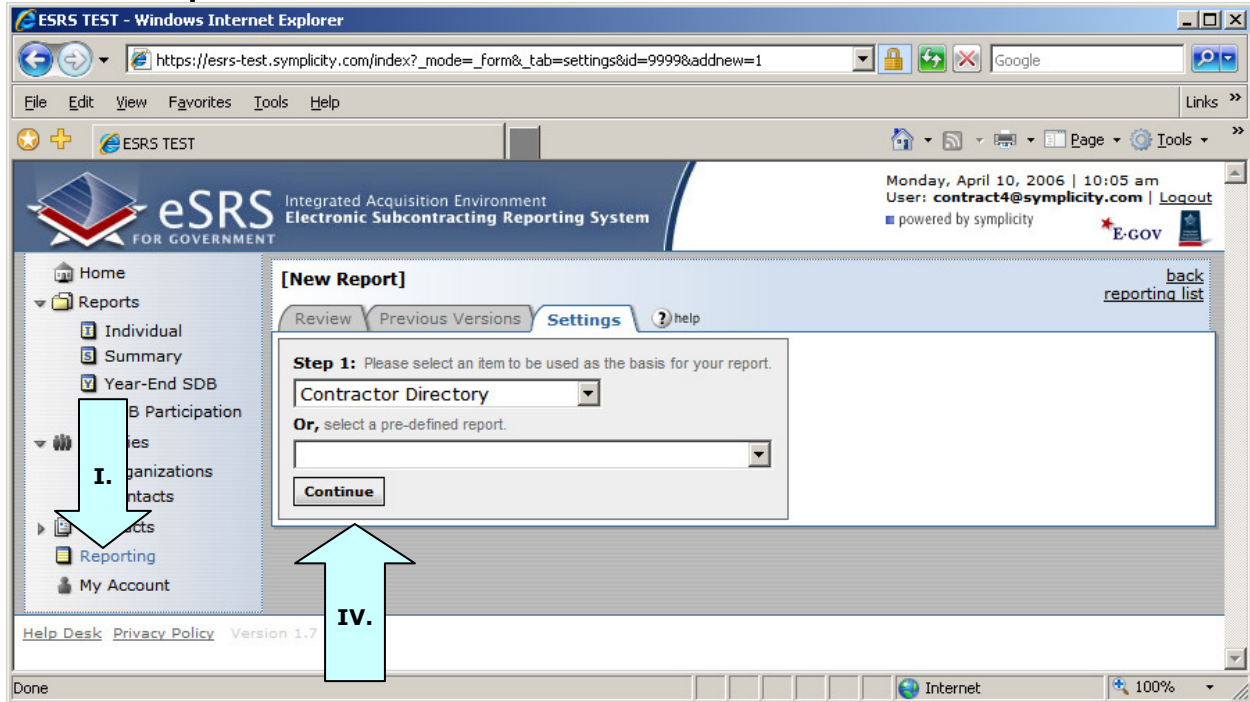


## 5. Reporting

### 5.1 Build New Reports

- I. Create a 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**

The screenshot shows the ESRS test application in a Windows Internet Explorer browser window. The address bar displays the URL: [https://esrs-test.simplicity.com/index?\\_mode=\\_form&\\_tab=settings&id=9999&adnew=1](https://esrs-test.simplicity.com/index?_mode=_form&_tab=settings&id=9999&adnew=1). The browser's title bar reads "ESRS TEST - Windows Internet Explorer".

The application header features the ESRS logo (Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR GOVERNMENT) and the user information: "Monday, April 10, 2006 | 10:09 am User: contract4@simplicity.com | Logout". It also indicates "powered by simplicity" and "E.GOV".

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 "[New Report]" and has tabs for "Review", "Previous Versions", "Settings", and "? help". A "back reporting list" link is in the top right.

The "Settings" tab is active, showing a form with the following elements:

- A checked checkbox and a text field containing "[contact] Brent / 2006-04-10 10:09:54". A light blue arrow labeled "VI." points to this field.
- A "Description:" text field.
- A "Max. on-screen results:" field set to "500" with a note "(enter zero to display all rows)".
- "Step 2: Please select the fields and filters you wish to have included in your report."
- A section titled "Base Class: Contacts" with a "Count" checkbox.
- A list of fields with checkboxes: Contractor, Last Name, First Name, Middle Name, Email, Phone, Fax, Cell Phone, Supervisor Name, Supervisor Email, SBA Region filter, and SBA Contract filter. A light blue arrow labeled "X." points to the "SBA Contract filter" option.

The browser status bar at the bottom shows "Done", "Internet", and "100%" zoom.



## 5.2 View Generated Report

- I. Click on the View Icon beside an existing report. **Note: A red "No Data Reported" value indicates that there are no Accepted reports in the system with applicable data.**
- 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 web application interface. The browser title is "ESRS TEST - Windows Internet Explorer". The address bar shows the URL: [https://esrs-test.symplicity.com/index?\\_mode=\\_form&\\_tab=review&id=247a2d85964d856d05d3b48831eb3](https://esrs-test.symplicity.com/index?_mode=_form&_tab=review&id=247a2d85964d856d05d3b48831eb3). The page header includes the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR GOVERNMENT". The user is logged in as "contract4@symplicity.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 are tabs for "Review", "Previous Versions", "Settings", and "?help". A row of buttons includes "Regen Report", "Open In New Window", "Save As Excel", "Change Settings", and "Return To Report List".





The report data is presented in a table with columns: "Contacts: Contractor", "Contacts: Firm Name", "Contacts: Middle Name", "Contacts: Email", and "Contacts: Phone". Callouts are placed over the table:

- Callout II. points to the "Open In New Window" button.
- Callout III. points to the "Save As Excel" button.
- Callout IV. points to the "Change Settings" button.
- Callout V. points to the "Return To Report List" button.

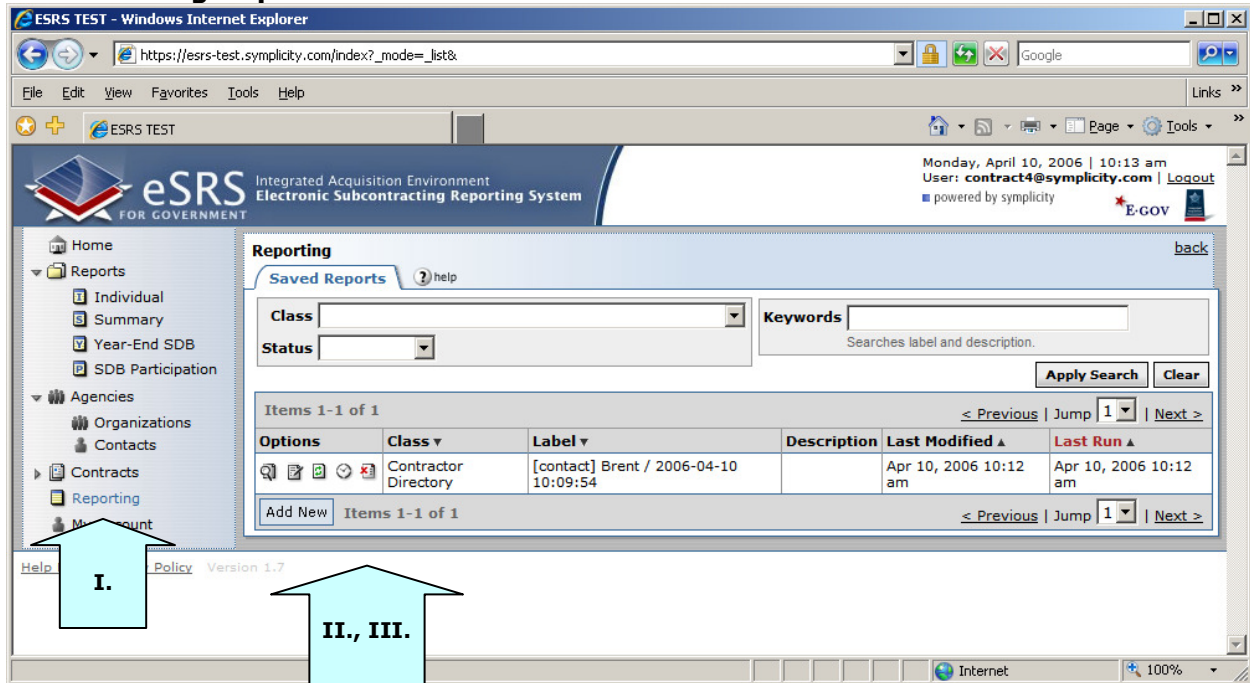
Contacts: Contractor	Contacts: Firm Name	Contacts: Middle Name	Contacts: Email	Contacts: Phone	
	All		contr1b@kennedygrou	7035551212	
	Mar		off5plo@yahoo.com	703-615-0003	
	hay		webmaster@kennedygrou	703-872-8538	
	kita	bob	stateesrs@yahoo.com	703-875-6881	
3001, INC.	Contract	Brent	Sub	subcontractor@symplicity.com	70335102008091
3M COMPANY	Fischer	John		jrfischer@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 URL is "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".

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


The main content area is titled "Reporting" and contains 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 area 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

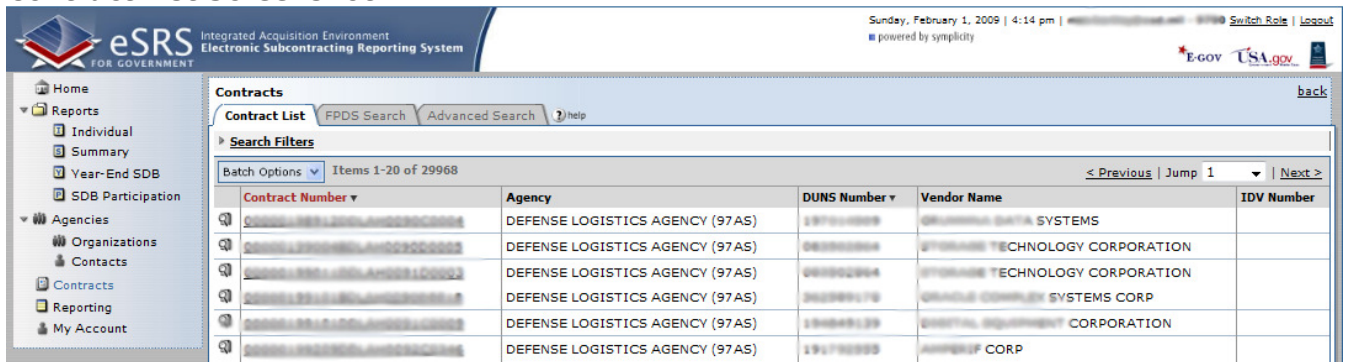
The table is titled "Items 1-1 of 1" and includes navigation links for "Previous", "Next", and "Jump". A red arrow labeled "II., III." points to the table.

## 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. **Note: You will not be able to search for PIID/Contract numbers that have been changed in FPDS-NG. You are only able to search for current PIID/Contract numbers.**

### Contract List Screenshot



The screenshot shows the eSRS (Integrated Acquisition Environment Electronic Subcontracting Reporting System) interface. The top navigation bar includes the eSRS logo and the text "FOR GOVERNMENT". The main content area is titled "Contracts" and has tabs for "Contract List", "FPDS Search", and "Advanced Search". Below the tabs, there is a "Search Filters" section and a table of contract listings. The table has the following columns: Contract Number, Agency, DUNS Number, Vendor Name, and IDV Number. The table displays 5 rows of contract data, all from the "DEFENSE LOGISTICS AGENCY (97AS)".

Contract Number	Agency	DUNS Number	Vendor Name	IDV Number
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	197110000	GRUNNIG DATA SYSTEMS	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	062000004	STORAGE TECHNOLOGY CORPORATION	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	062000004	STORAGE TECHNOLOGY CORPORATION	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	362000170	GRAND COMPLEX SYSTEMS CORP	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	100000100	CRITICAL EQUIPMENT CORPORATION	
[Contract Number]	DEFENSE LOGISTICS AGENCY (97AS)	191700000	AMPERIF CORP	

## 7. My Account

### 7.1 General Information

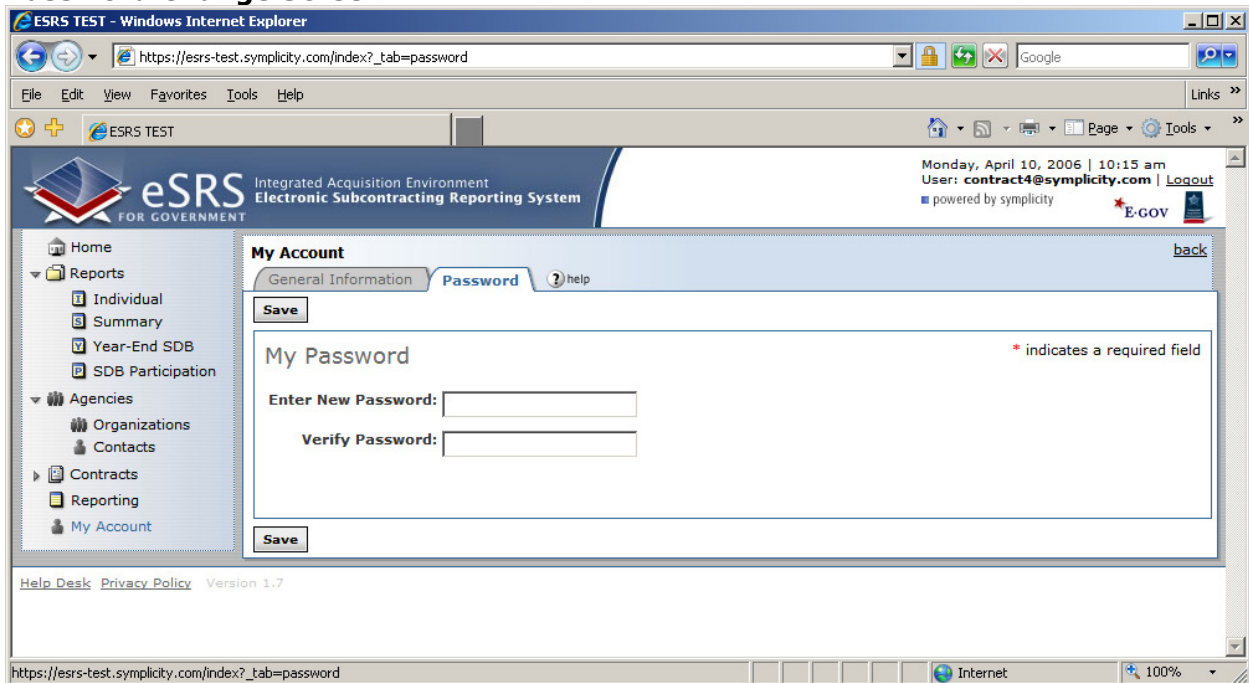
My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

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

### 7.2 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



ESRS TEST - Windows Internet Explorer

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

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

**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