Electronic Subcontracting Reporting System (ESRS)

Designated Government User Guide 2.0

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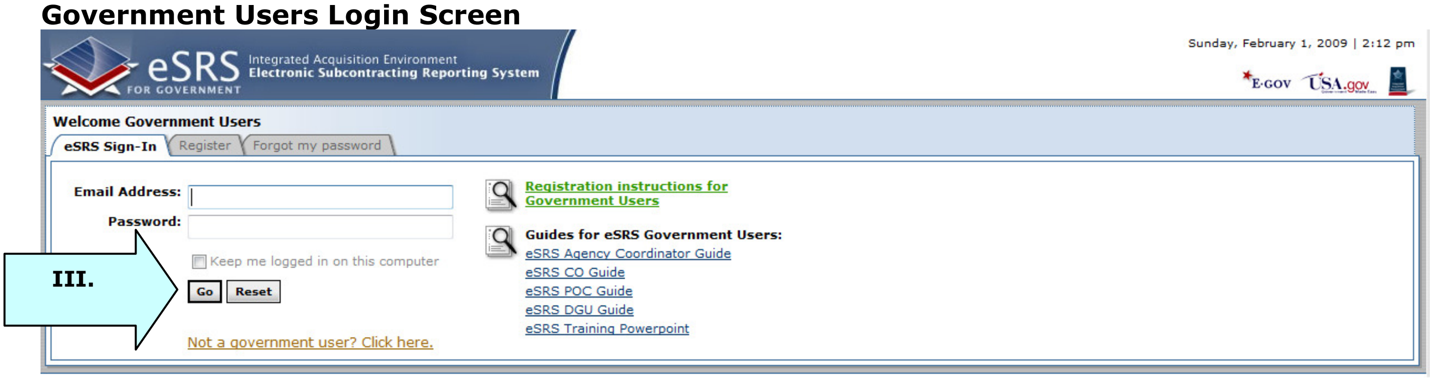
1. Log-In to ESRS

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"

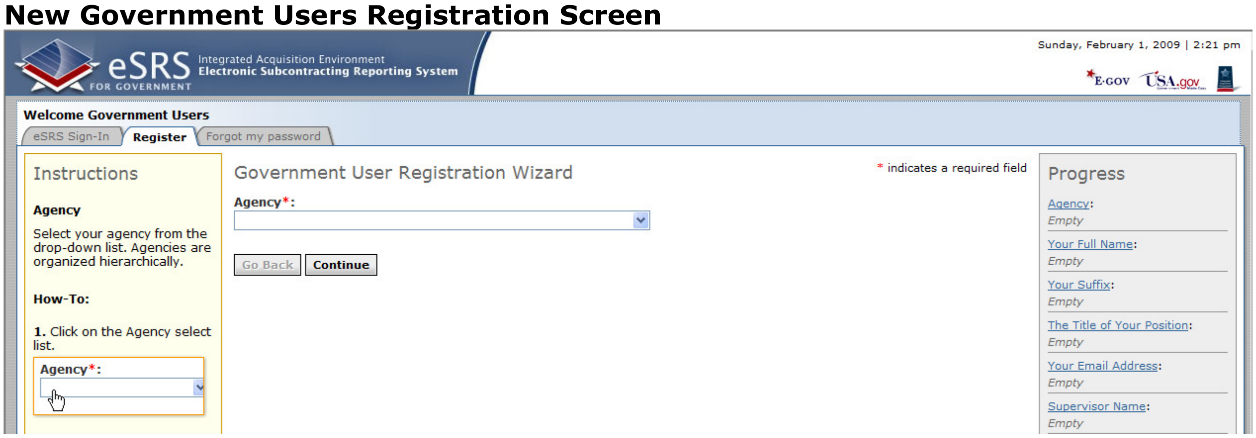
Government Users Login Screen



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.

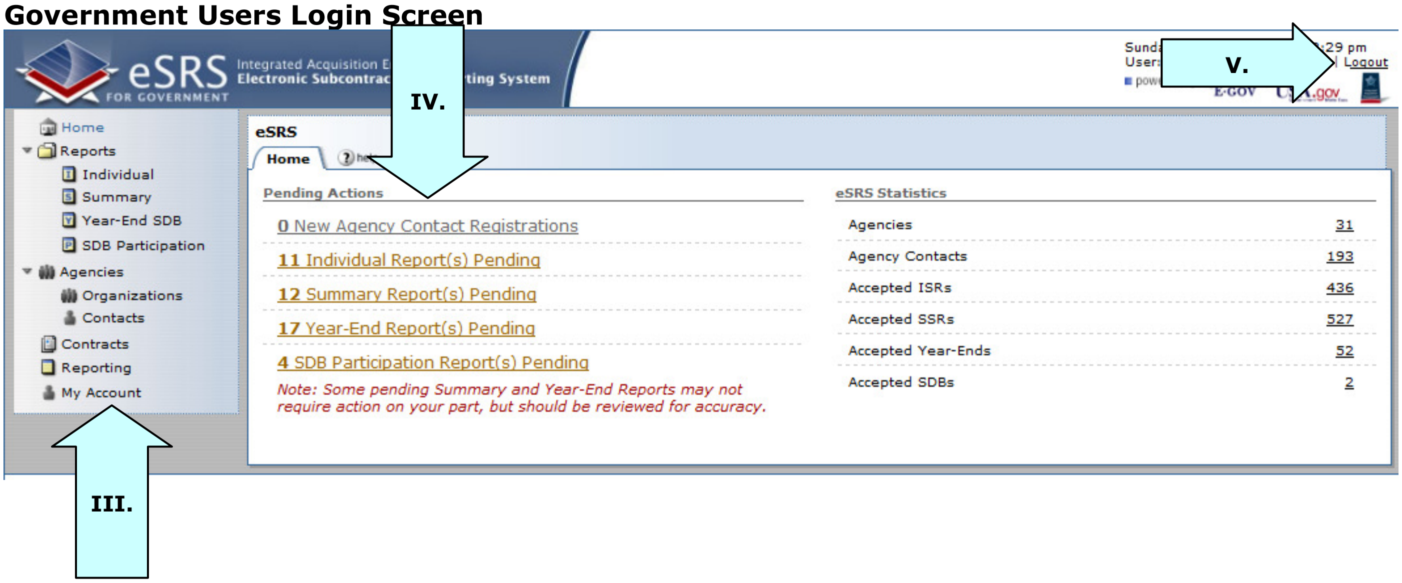
New Government Users Registration Screen



2. Home

I. Login to ESRS.
II. You will be directed to your ESRS homepage. (Depending upon your account, your homepage and navigation menu may appear differently)
III. On the left hand side of the screen, the navigation menu is shown. This menu is available throughout all pages on the system.
IV. "Pending Actions" will display all items in the system that your account has access to with the status "pending".
V. Finally, when you are done using the system, please click on the "Logout" link on the top of every page.

Government Users Login Screen



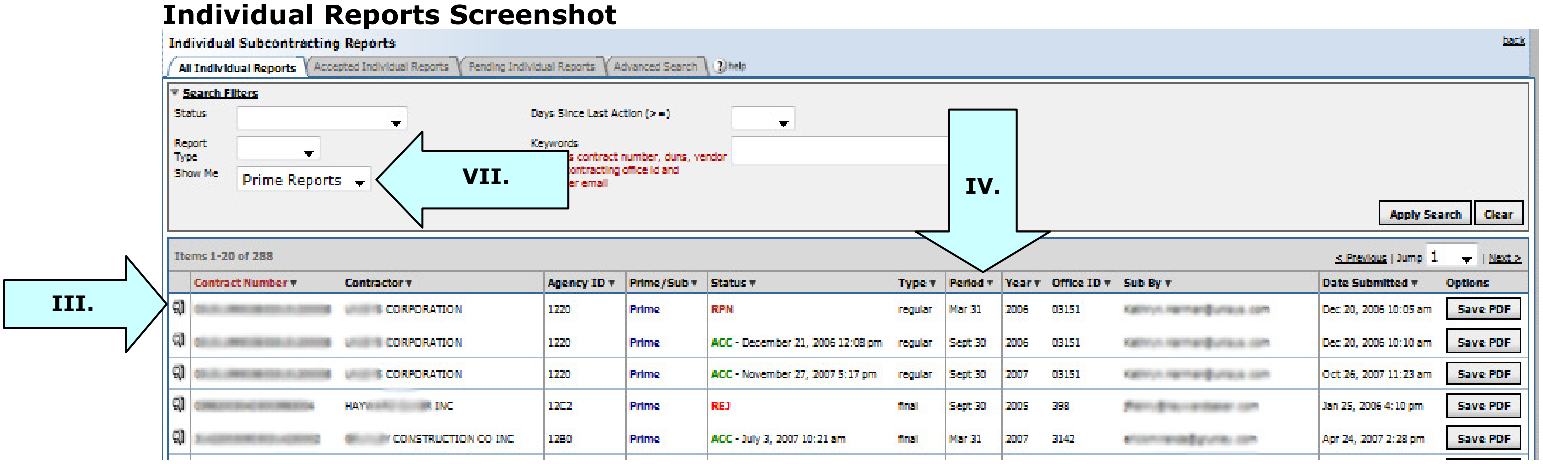
3. Reports

Note: The DGU account type will only have the ability to view reports. If action needs to be taken on a report, contact the eSRS Agency Coordinator or Point of Contact.

3.1 Individual

I. Click on "Reports" and then "Individual" on the left hand navigation menu.
II. You will see a screen similar to the Individual Reports Screenshot below.
III. Click on the View Icon beside any report to see more information regarding the filed report.
IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the "Next >" or "< Previous" links to traverse through the list.
VII. You may also select Prime or Sub reports.

Individual Reports Screenshot



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

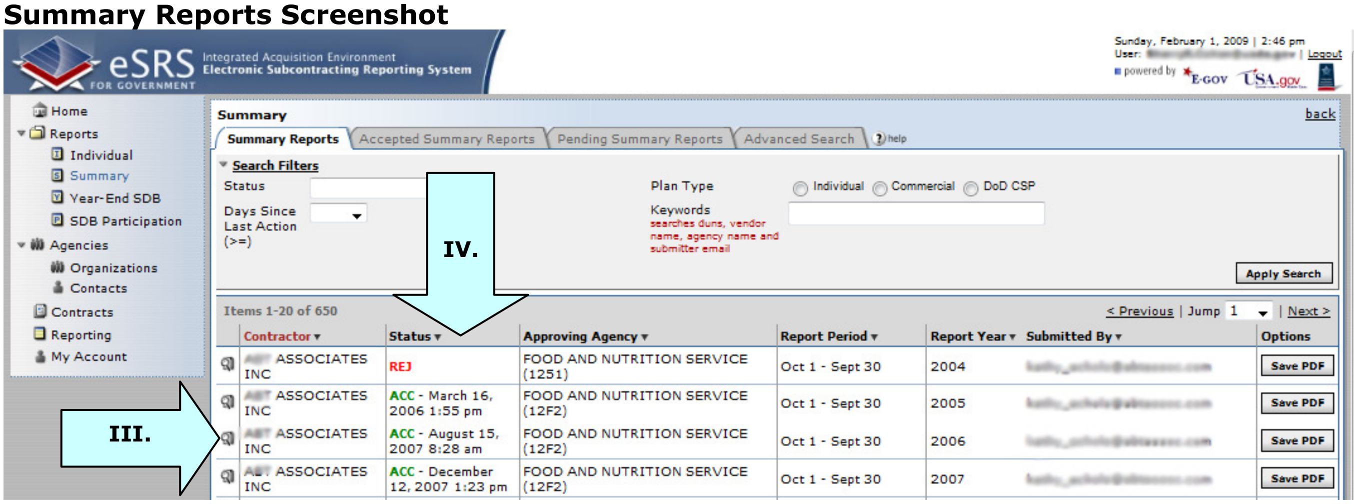
I. Agencies have the ability to modify PIID/Contract numbers in FPDS-NG.

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.
VII. Choose the Search Criteria to limit the results.

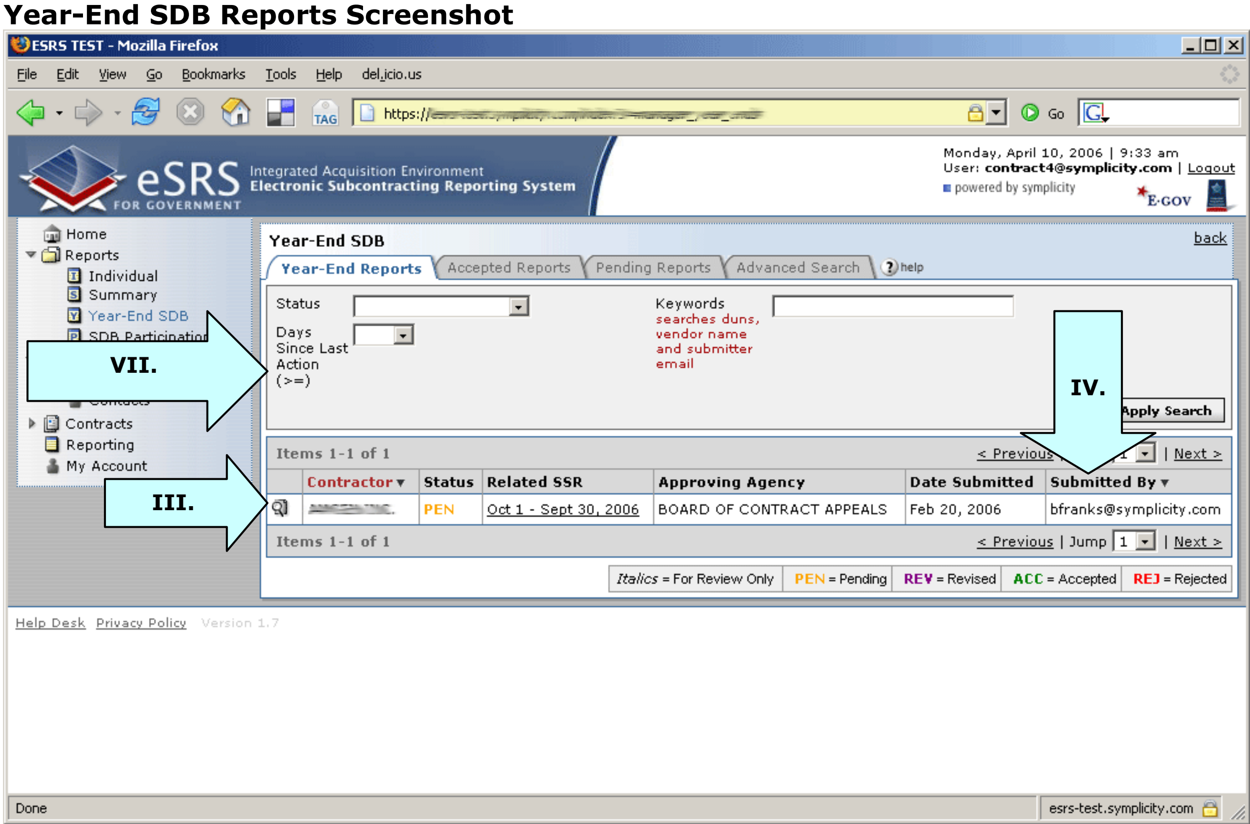
Summary Reports Screenshot



3.3 Year-End SDB

I. Click on “Reports” and then “Year-End SDB” on the left hand navigation menu.
II. You will see a screen similar to the Year-End SDB Reports Screenshot below.
III. Click on the View Icon beside any report to see more information regarding the filed report.
IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow (▾) in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the “Next >” or “< Previous” links to traverse through the list.
VII. Choose the Filter Criteria to limit the list of results.

Year-End SDB Reports Screenshot



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.

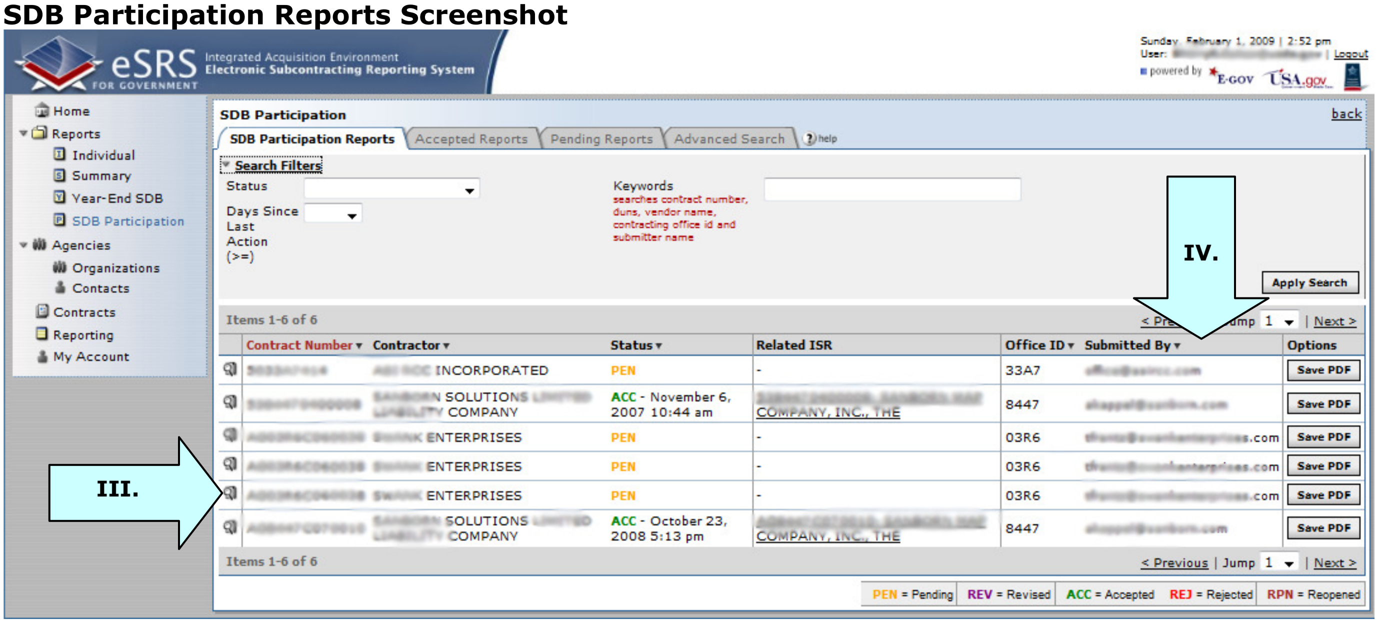
III. Click on the View Icon beside any report to see more information regarding the filed report.

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

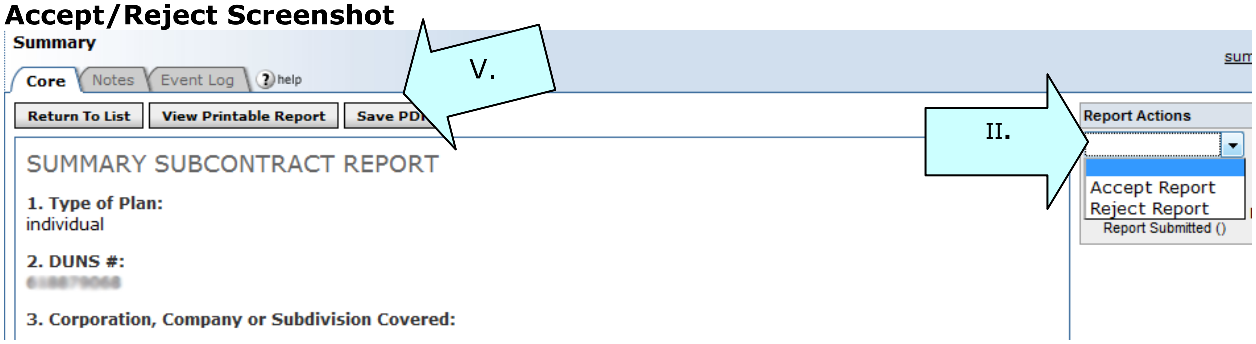


3.5 Accept / Reject (No Administering Agency Designated on Report)

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.

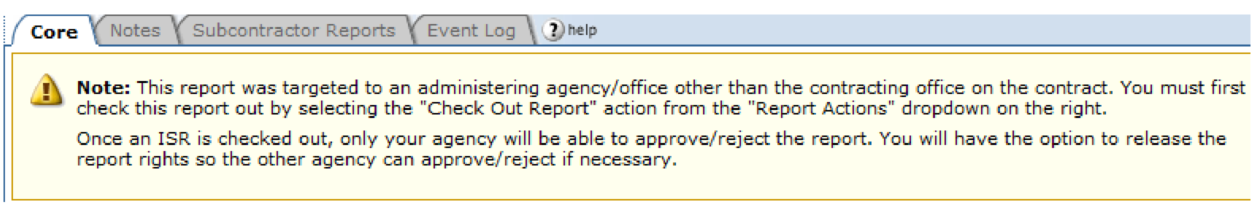
Accept/Reject Screenshot



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.

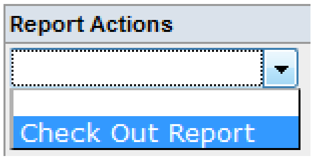


NOTE: In order to Accept/Reject a report that has an Administering Agency, the "Check Out" function must be available. If the "Check Out Report" action is not available, you will need to request that the report be released by the agency who currently has the report checked out.

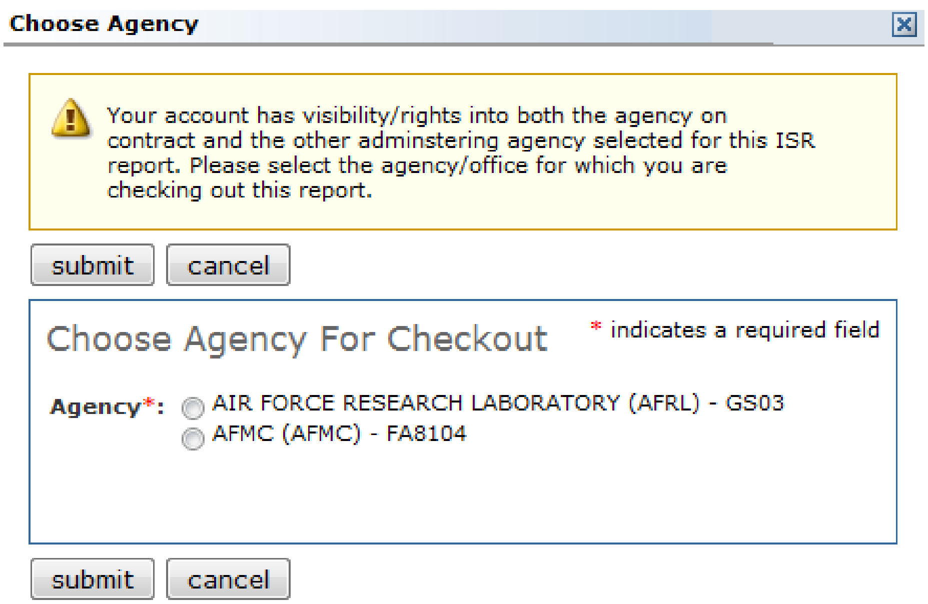
3.6.1 Accept/Reject

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

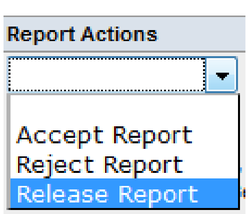
II. Select "Check Out Report" from the "Report Actions" drop down box on the right (see Report Actions screenshot below) and click the "Go" button. **Note:** If you check out the report, only your agency/office will have accept/reject rights for the report. If you check out the report, the action will 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).



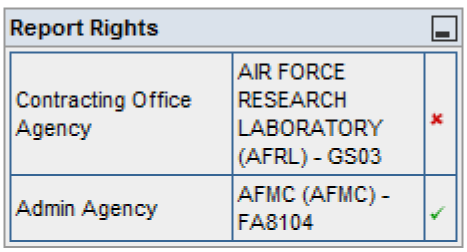
III. If you have the report checked out, you will be able to select "Accept Report" or "Reject Report" from the "Report Actions" drop down box on the right by clicking on the appropriate action. A notification box will appear to allow you to enter a note for the report that will be viewable by all parties reviewing the report. **Note:** If you "Reject" a report you are required to provide a notification as to why.



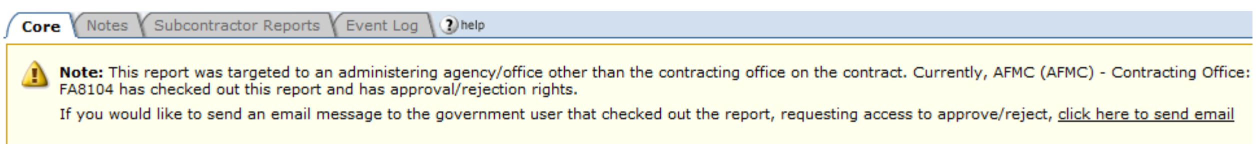
IV. Click "Submit" to finalize the action.
V. You may view a printable report or, save as PDF, or return to the reports list by selecting the appropriate button at the top of the core report page.
VI. If you accept or reject the report, the action will be tracked in the right hand "Action History" sidebar for both involved agencies to view

3.6.2 Request to Release 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.
  a. A red "x" will display next to the agency that does NOT have the report checked out.
  b. A green check mark will display next to the agency that currently has the report checked out.



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"**.



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."

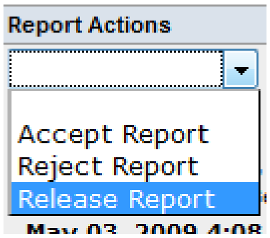
IV. You may also request access to a report by clicking on the "request access" button found in the "Report Rights" box.

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.

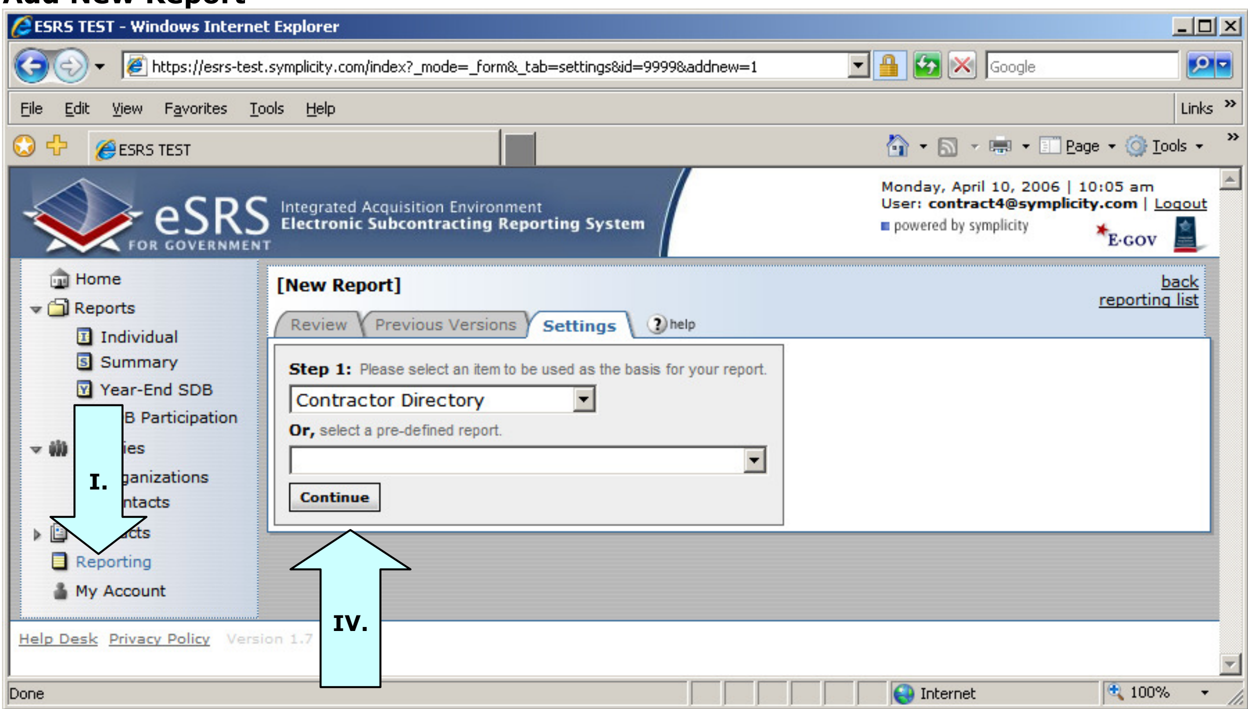


4. Reporting

4.1 Build New Reports

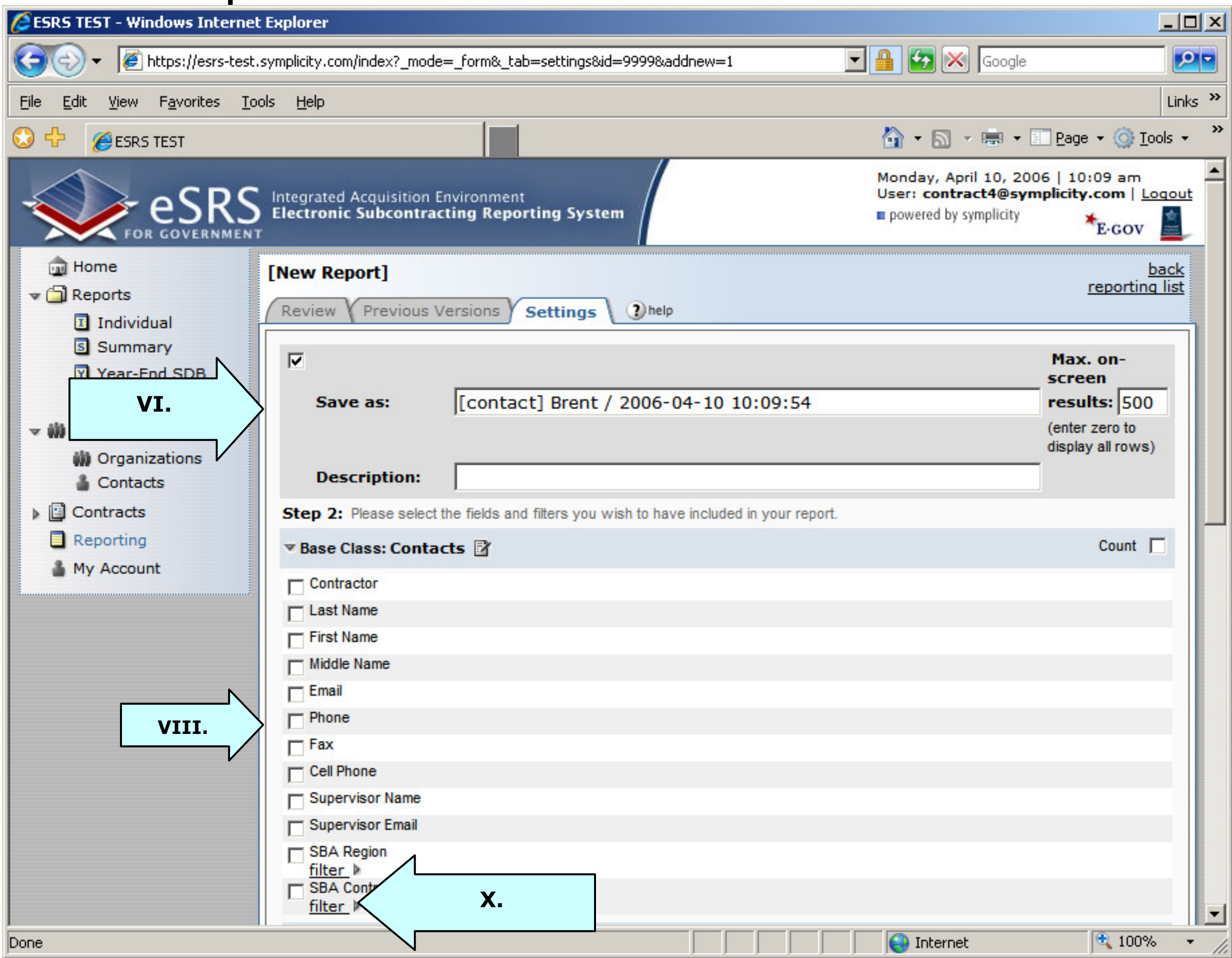
I. Create New Report by clicking on REPORTING on the left navigation menu.
II. Click on Add New
III. You will be taken to a screen similar to the one below.

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 & continue will save change to report builder, but will not run report in order to view it.

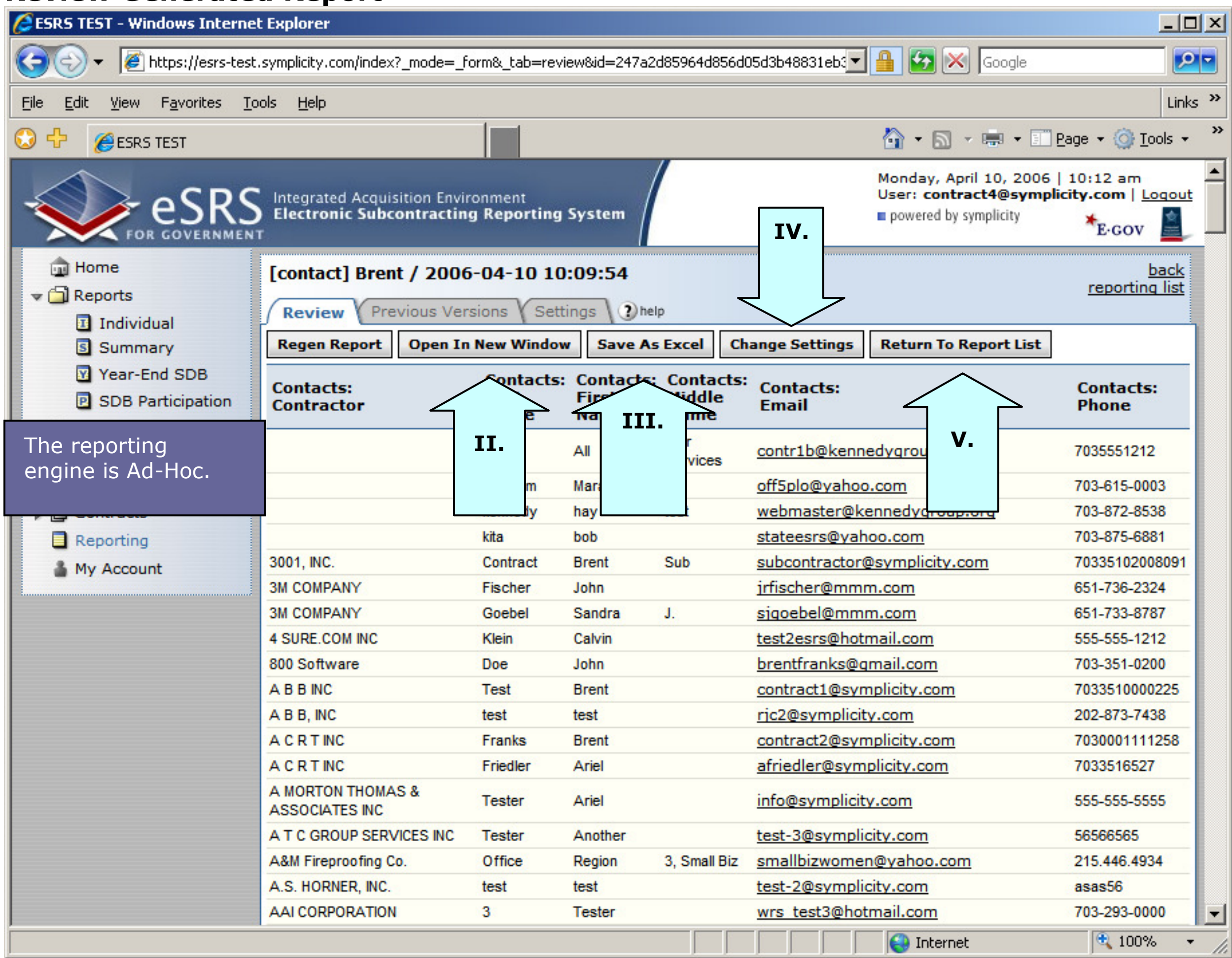
Build a New Report



4.2 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.

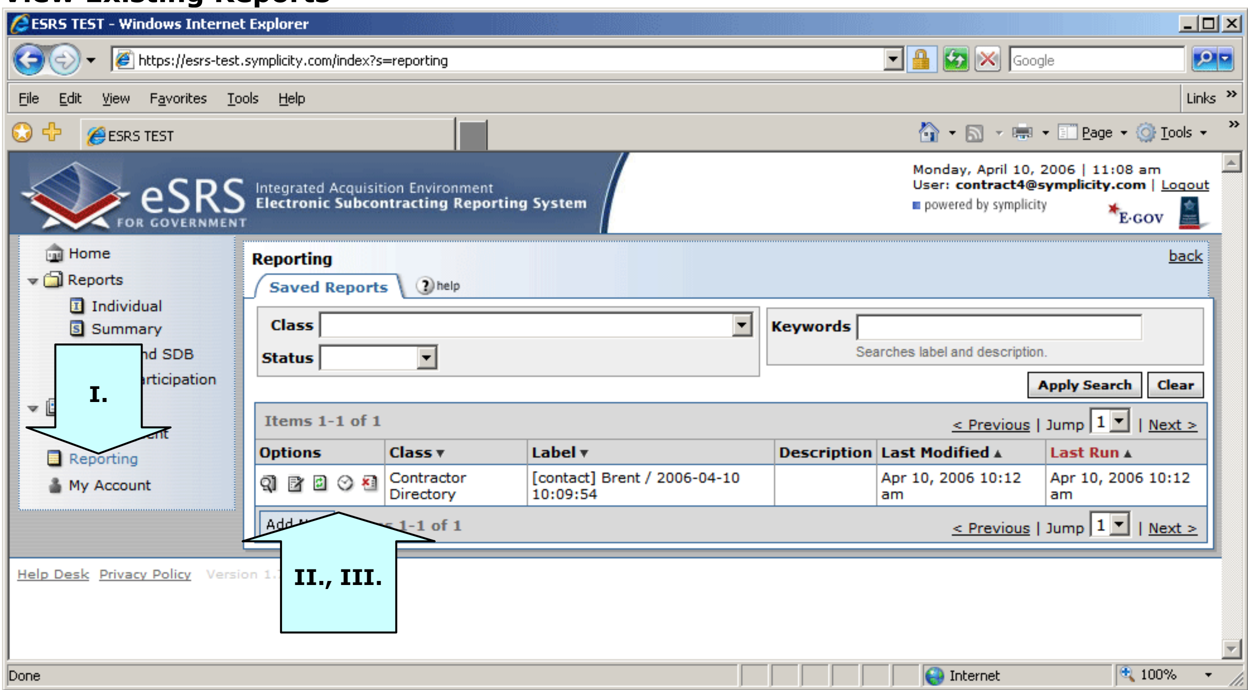
Review Generated Report



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



5. My Account

5.1 General Information

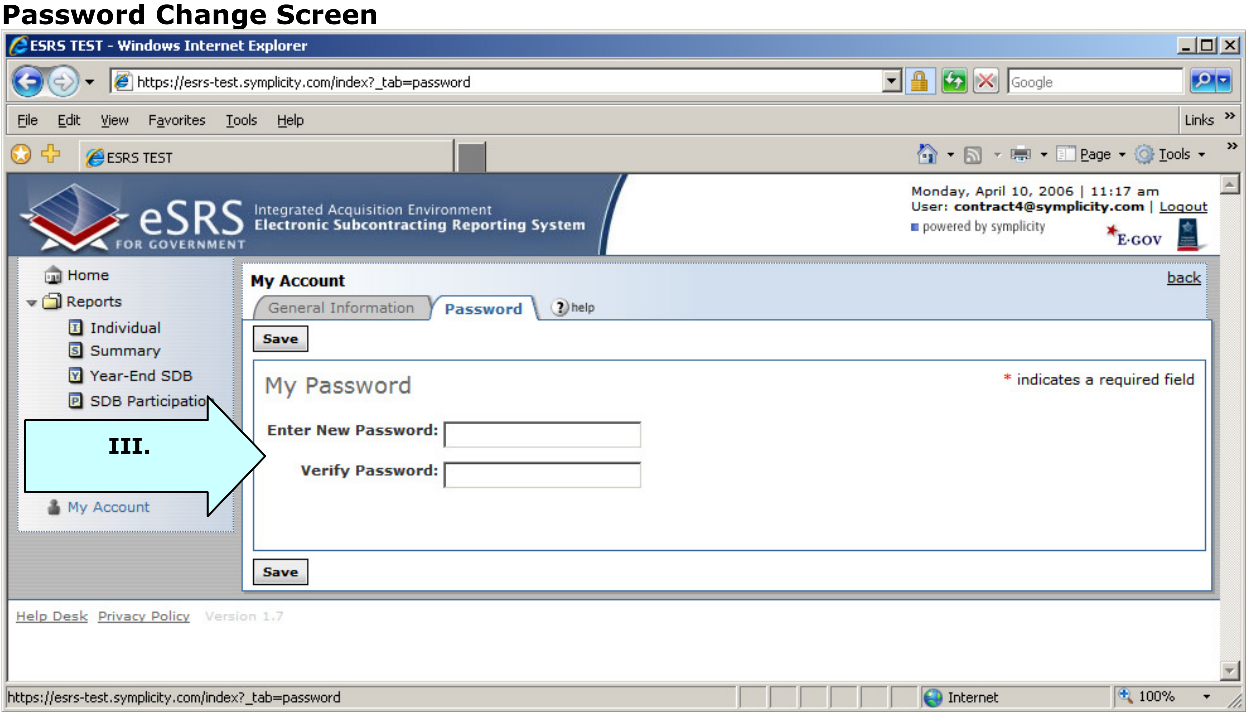
My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

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

5.2 Change Password

I. Click on My Account in the left navigation menu.
II. Click on the password tab.
III. Enter your new password.
IV. Click on "Save".

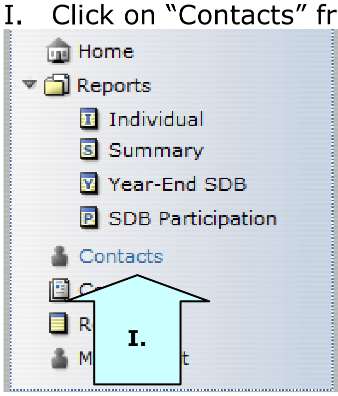
Password Change Screen



6. Agency Contacts

6.1 View Agency Contacts

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

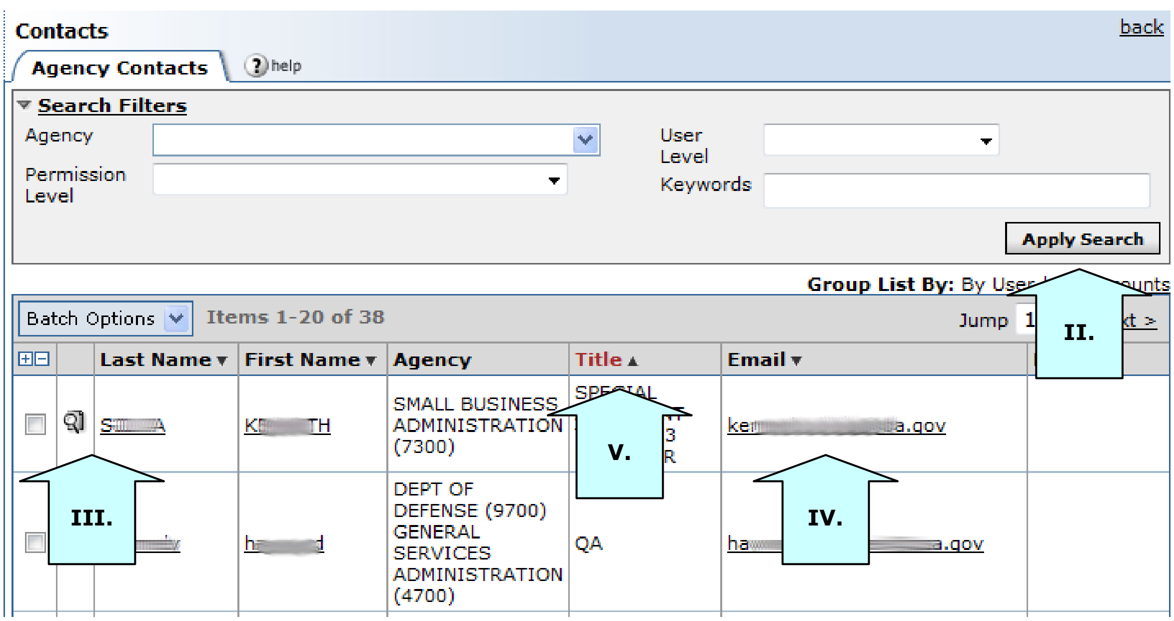


II. The list will default to ALL registered government users, however, you can use the Search Filters to refine the list by Agency, Permission Level (Account Type), User Level (agency or contracting office) and/or Keywords (e.g., name, email).

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.

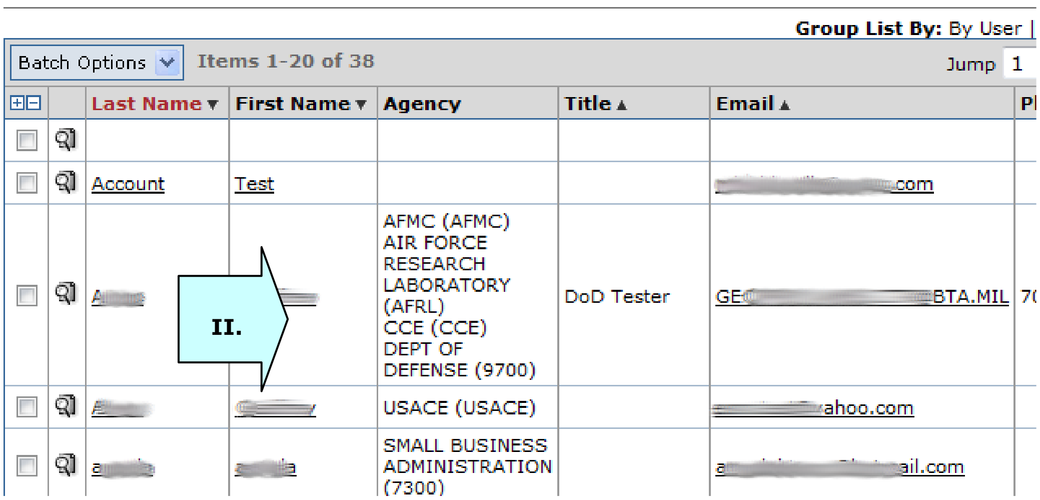
V. You can sort any columns with a black arrow in the header.



6.1.1 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.

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.

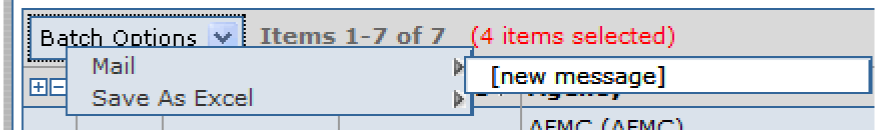


III. The "Group List By Accounts" option will display each account in one row of the main list. This means that if a user has multiple accounts or "hats" associated with their user registration, each account will be listed in its own row. When in this view, you will be able to sort by Agency or Office.

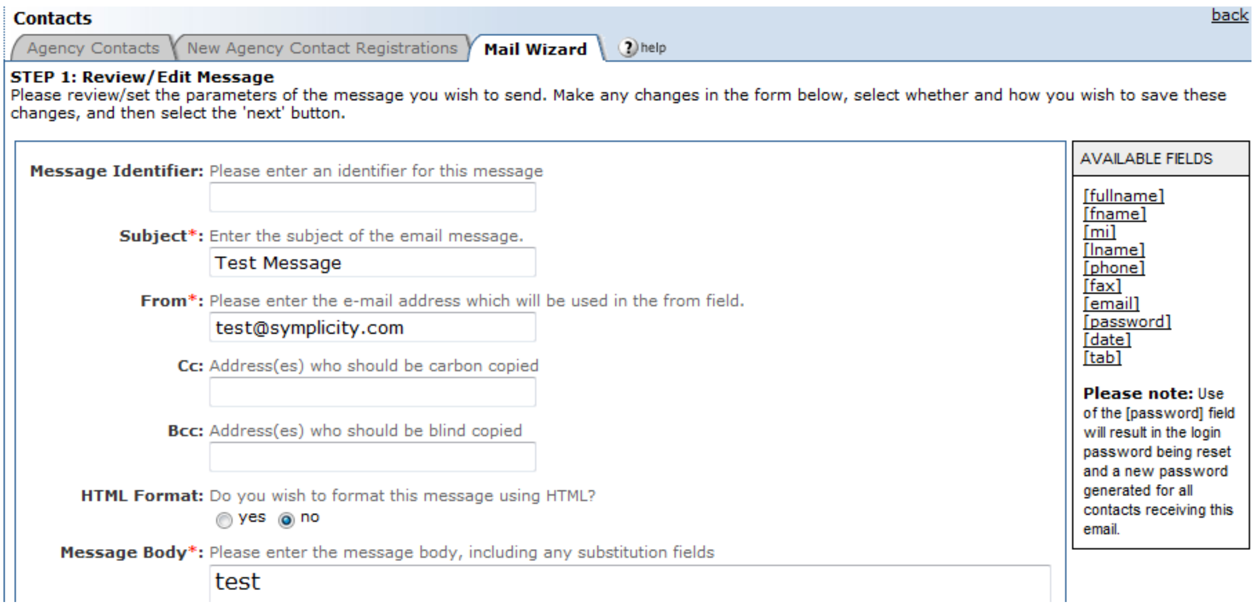
6.2 Batch Options: Mail

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

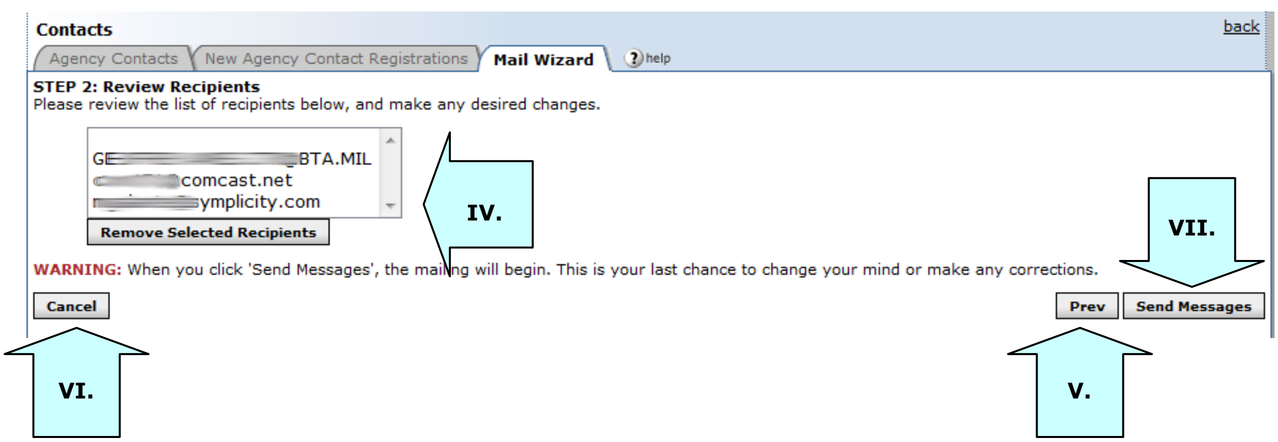
II. After selecting the desired contacts, you can send an email message to all by selecting Batch Options -→ Mail -→ [new message]



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.



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.



6.3 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.