

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


The screenshot shows the ESRS Government Users Login Screen. The page has a blue header with the ESRS logo and the text "Integrated Acquisition Electronic Subcontracting System". On the left is a navigation menu with categories: Home, Reports (Individual, Summary, Year-End SDB, SDB Participation), Agencies (Organizations, Contacts), Contracts, Reporting, and My Account. The main content area is titled "eSRS Home" and features a "Pending Actions" section with a list of pending reports: 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. Below this is a note: "Note: Some pending Summary and Year-End Reports may not require action on your part, but should be reviewed for accuracy." To the right is an "eSRS Statistics" table. In the top right corner, there is a user profile section with a "Logout" link. Three red arrows point to specific elements: III points to the navigation menu, IV points to the Pending Actions section, and V points to the Logout link.

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

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

Individual Subcontracting Reports

All Individual Reports Accepted Individual Reports Pending Individual Reports Advanced Search ?/help

Search Filters






Status: Days Since Last Action (>=):

Report Type: Keywords:

Show Me: Prime Reports **VII.**

Apply Search Clear

Items 1-20 of 288 < Previous | Jump 1 | Next >

Contract Number	Contractor	Agency ID	Prime/Sub	Status	Type	Period	Year	Office ID	Sub By	Date Submitted	Options
	UNIVERSITY CORPORATION	1220	Prime	RPN	regular	Mar 31	2006	03151	kabon.neman@usmc.com	Dec 20, 2006 10:05 am	Save PDF
	UNIVERSITY CORPORATION	1220	Prime	ACC - December 21, 2006 12:08 pm	regular	Sept 30	2006	03151	kabon.neman@usmc.com	Dec 20, 2006 10:10 am	Save PDF
	UNIVERSITY CORPORATION	1220	Prime	ACC - November 27, 2007 5:17 pm	regular	Sept 30	2007	03151	kabon.neman@usmc.com	Oct 26, 2007 11:23 am	Save PDF
	HAYWARD CONSTRUCTION INC	12C2	Prime	REJ	final	Sept 30	2005	398	jhon@haywardcon.com	Jan 25, 2006 4:10 pm	Save PDF
	CONSTRUCTION CO INC	1280	Prime	ACC - July 3, 2007 10:21 am	final	Mar 31	2007	3142	etommaso@usmc.com	Apr 24, 2007 2:28 pm	Save PDF

III. **IV.** **VII.**

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


The screenshot displays the eSRS Summary Reports interface. At the top right, it shows the date and time: Sunday, February 1, 2009 | 2:46 pm. The user is identified as 'User: [redacted] | Logout'. The page is powered by E-Gov and USA.gov.

The main content area is titled 'Summary' and includes tabs for 'Summary Reports', 'Accepted Summary Reports', 'Pending Summary Reports', and 'Advanced Search'. Below these are search filters for 'Status', 'Days Since Last Action', and 'Plan Type' (Individual, Commercial, DoD CSP). A 'Keywords' search field is also present.

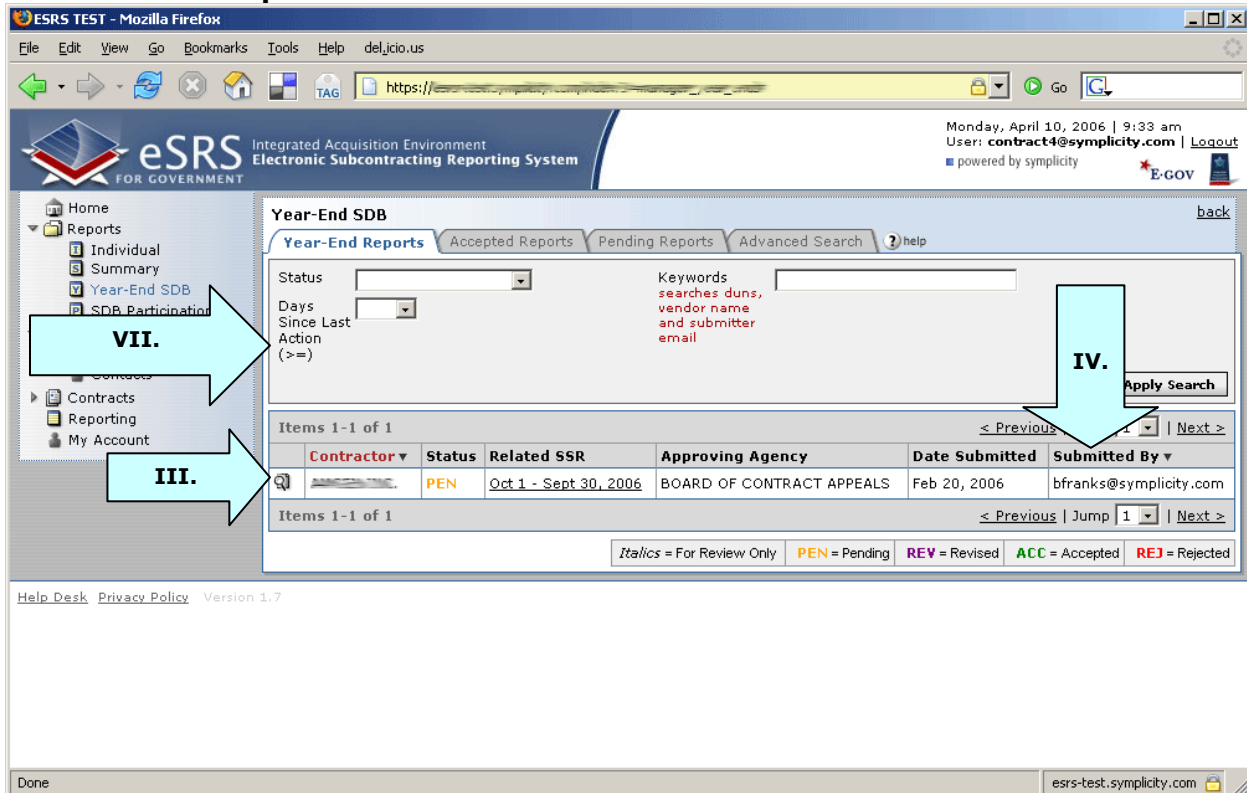
The table below shows a list of reports with columns for Contractor, Status, Approving Agency, Report Period, Report Year, Submitted By, and Options. The 'Contractor' column is highlighted in maroon, indicating it is the active sort column. A red arrow labeled 'III.' points to the 'Summary' link in the left navigation menu, and a blue arrow labeled 'IV.' points to the 'Contractor' column header.

Contractor ▼	Status ▼	Approving Agency ▼	Report Period ▼	Report Year ▼	Submitted By ▼	Options
AST ASSOCIATES INC	REJ	FOOD AND NUTRITION SERVICE (1251)	Oct 1 - Sept 30	2004	hally_pchik@alabama.com	Save PDF
AST ASSOCIATES INC	ACC - March 16, 2006 1:55 pm	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2005	hally_pchik@alabama.com	Save PDF
AST ASSOCIATES INC	ACC - August 15, 2007 8:28 am	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2006	hally_pchik@alabama.com	Save PDF
AST ASSOCIATES INC	ACC - December 12, 2007 1:23 pm	FOOD AND NUTRITION SERVICE (12F2)	Oct 1 - Sept 30	2007	hally_pchik@alabama.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.
- VII. Choose the Filter Criteria to limit the list of results.

Year-End SDB Reports Screenshot




The screenshot shows the eSRS (Integrated Acquisition Environment Electronic Subcontracting Reporting System) interface. The browser window is titled "ESRS TEST - Mozilla Firefox". The page content includes a navigation menu on the left with "Year-End SDB" selected. The main area displays "Year-End SDB" reports with search filters and a table of results.

Table Data:

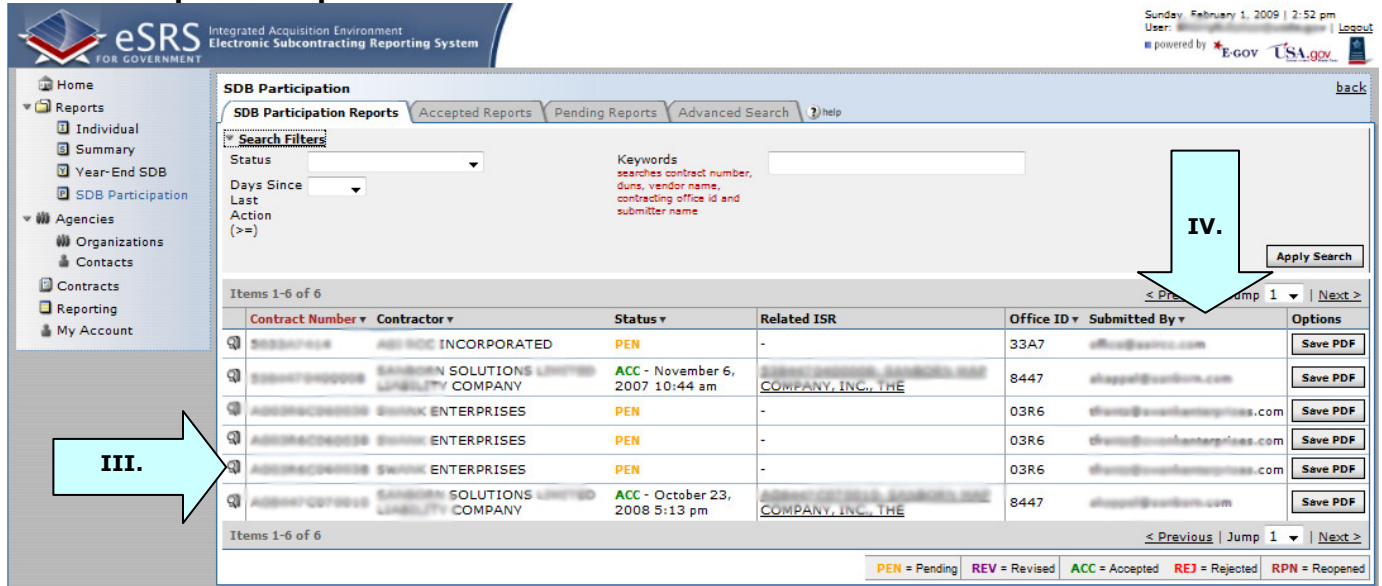
Contractor	Status	Related SSR	Approving Agency	Date Submitted	Submitted By
	PEN	Oct 1 - Sept 30, 2006	BOARD OF CONTRACT APPEALS	Feb 20, 2006	bfranks@symplicity.com

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

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 shows the eSRS (Integrated Acquisition Environment Electronic Subcontracting Reporting System) interface. The main content area is titled "SDB Participation" and contains a table of reports. The table has columns for Contract Number, Contractor, Status, Related ISR, Office ID, Submitted By, and Options. The "Contract Number" column header is highlighted in maroon, indicating it is the active sort column. A legend at the bottom right explains the status codes: PEN = Pending, REV = Revised, ACC = Accepted, REJ = Rejected, RPN = Reopened.

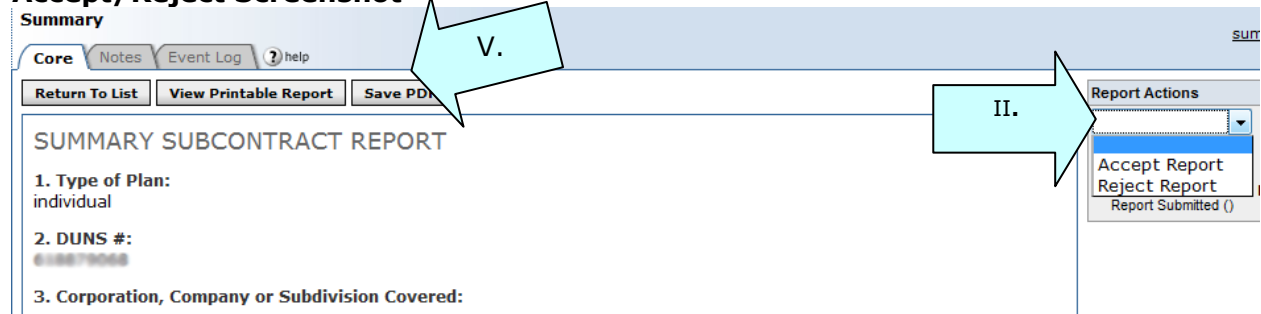
Contract Number	Contractor	Status	Related ISR	Office ID	Submitted By	Options
503307034	ADTRIC INCORPORATED	PEN	-	33A7	af@adtric.com	Save PDF
50330703008	SANBORN SOLUTIONS LIMITED LIABILITY COMPANY	ACC - November 6, 2007 10:44 am	50330703008 SANBORN SOLUTIONS LIMITED LIABILITY COMPANY, INC., THE	8447	shappel@sanborn.com	Save PDF
50330703008	SWANK ENTERPRISES	PEN	-	03R6	shank@swankenterprises.com	Save PDF
50330703008	SWANK ENTERPRISES	PEN	-	03R6	shank@swankenterprises.com	Save PDF
50330703008	SWANK ENTERPRISES	PEN	-	03R6	shank@swankenterprises.com	Save PDF
50330703008	SANBORN SOLUTIONS LIMITED LIABILITY COMPANY	ACC - October 23, 2008 5:13 pm	50330703008 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.

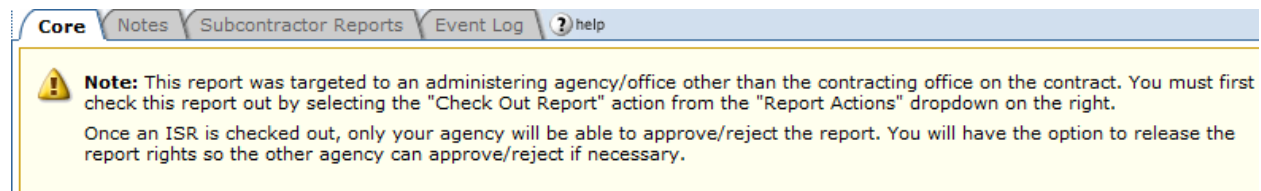
Accept/Reject Screenshot



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.

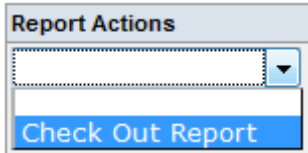
The first step is to go to the Individual Reports section. Click on the "Pending" tab near the top of the screen, and find the report that you would like to manage. If a report has an Administering Agency selected, a note will display at the top of the report advising of the status.



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).

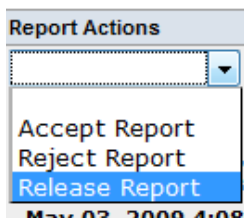
Choose Agency ✕

 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 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.

Contracting Office Agency	AIR FORCE RESEARCH LABORATORY (AFRL) - GS03	x
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](#)

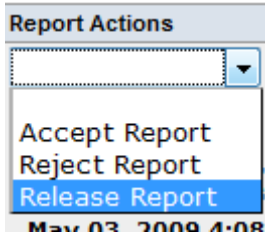
After clicking on the "click here to send email" link, your email client will generate a new email message with the "To" and "Subject" fields pre-populated. The email will be sent to the agency user who currently has the report checked out with the subject "Request Access to ISR Report."

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

Contracting Office Agency	AIR FORCE RESEARCH LABORATORY (AFRL) - GS03	✓
Admin Agency	CCE (CCE) - W91WAW	x
<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.

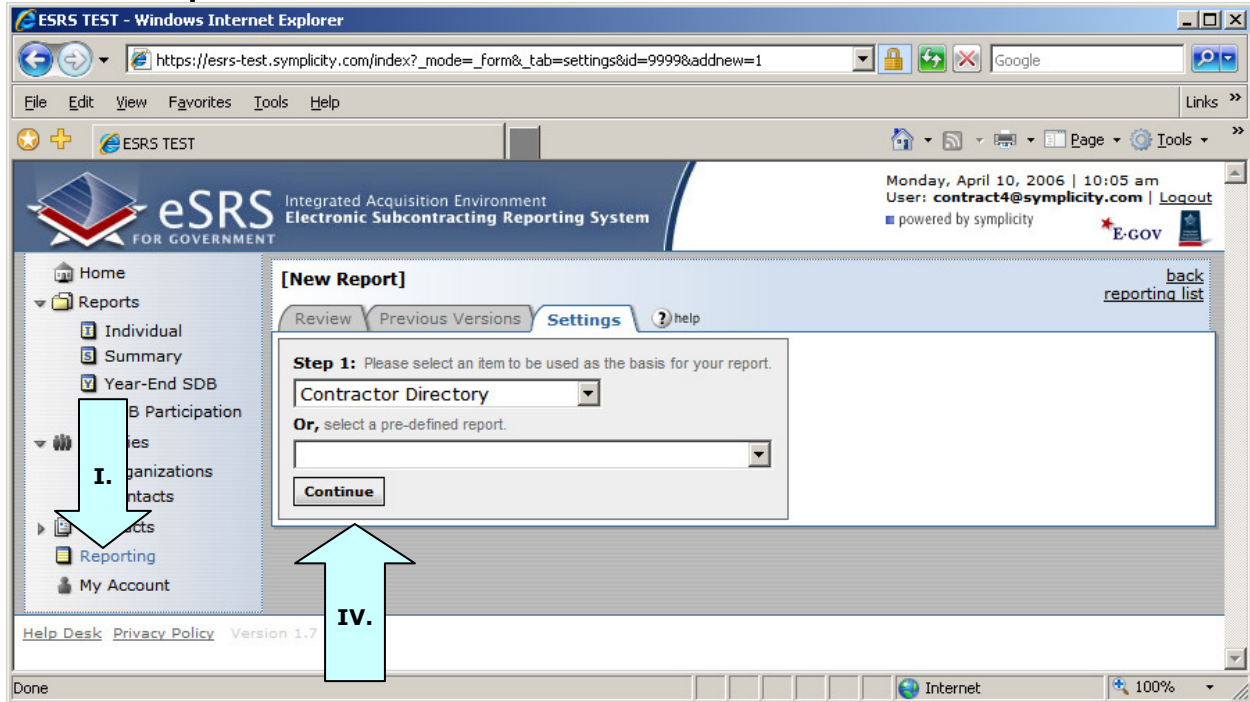


4. Reporting

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 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

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. **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

Monday, April 10, 2006 | 10:12 am
User: contract4@symplicity.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
	m	Mar	off5plo@yahoo.com	703-615-0003
	y	hay	webmaster@kennedygrou	703-872-8538
	kita	bob	stateesrs@yahoo.com	703-875-6881
3001, INC.	Contract	Brent	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
A.S. HORNER, INC.	test	test	test-2@symplicity.com	215.446.4934
AAI CORPORATION	3	Tester	wrs_test3@hotmail.com	703-293-0000

The reporting engine is Ad-Hoc.

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

ESRS TEST - Windows Internet Explorer

https://esrs-test.simplicity.com/index?s=reporting

Monday, April 10, 2006 | 11:08 am
User: contract4@simplicity.com | Logout
powered by simplicity E-GOV

Home
Reports
Individual
Summary
I. Reporting
My Account

Reporting [back](#)





Saved Reports [? help](#)

Class
Status

Keywords
Searches label and description.

Apply Search Clear

Items 1-1 of 1 < Previous | Jump 1 | Next >

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

II., III.

Done Internet 100%

5. My Account

5.1 General Information

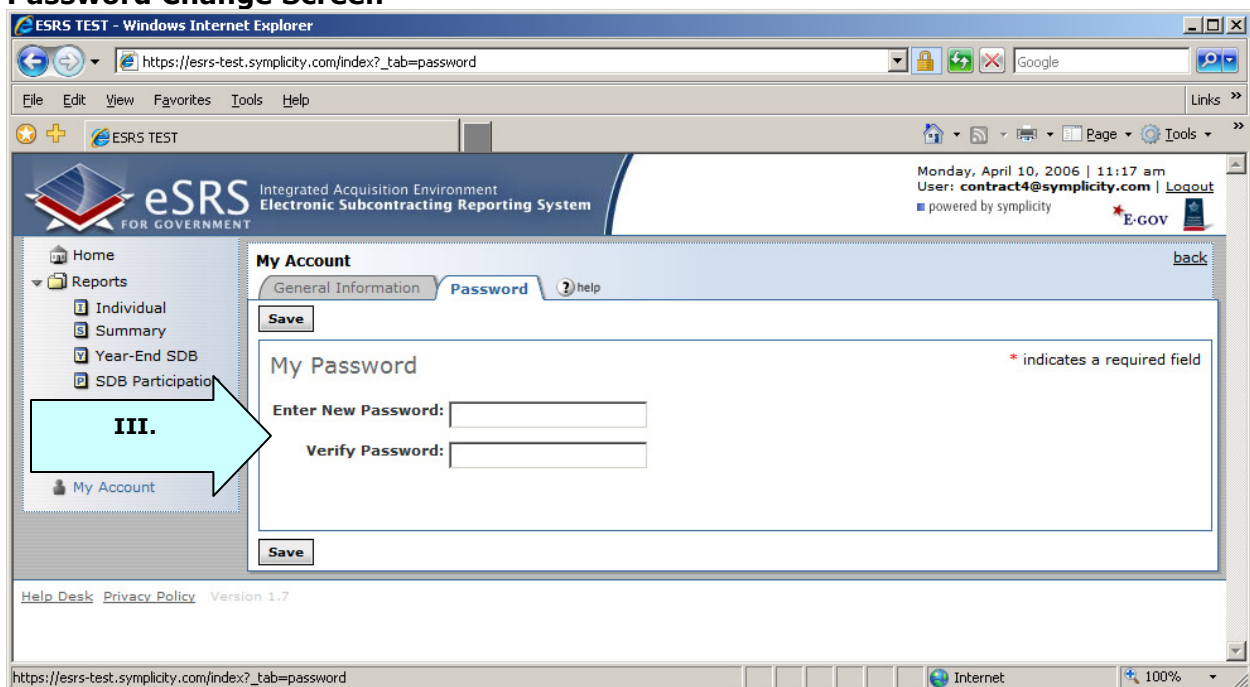
My Account enables users to change their personal information (Name, Title, Phone, Fax, E-mail) and passwords.

- 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".

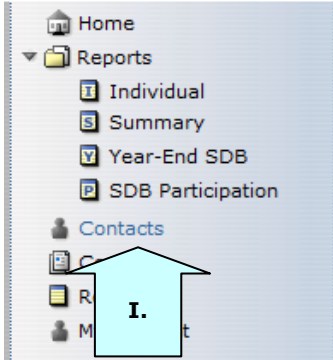
Password Change Screen



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.

A screenshot of the 'Agency Contacts' page. At the top, there is a 'Search Filters' section with dropdown menus for Agency, Permission Level, and User Level, and a text input for Keywords. An 'Apply Search' button is located to the right. Below the filters, there is a table of contacts. The table has columns for Last Name, First Name, Agency, Title, and Email. Annotations include:

- An arrow labeled 'II.' pointing to the 'Group List By' dropdown.
- An arrow labeled 'III.' pointing to the magnifying glass icon in the first row.
- An arrow labeled 'IV.' pointing to the email address in the second row.
- An arrow labeled 'V.' pointing to the 'Title' header.

	Last Name ▼	First Name ▼	Agency	Title ▲	Email ▼
<input type="checkbox"/>	S...	KE...TH	SMALL BUSINESS ADMINISTRATION (7300)	SPECIAL...	ke...a.gov
<input type="checkbox"/>	...	h...	DEPT OF DEFENSE (9700) GENERAL SERVICES ADMINISTRATION (4700)	QA	ha...a.gov

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.

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 ▲	P
<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	

A blue arrow labeled 'II.' points to the 'Agency' column of the second row.

- 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

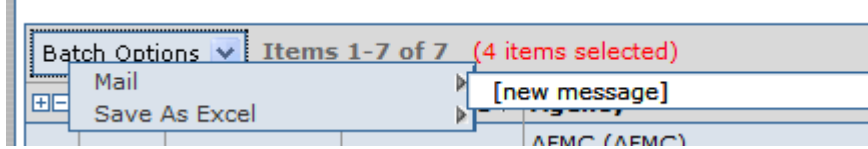
- I. Use the checkbox feature to select the desired contacts. Or, use the to select ALL or deselect ALL contacts.

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

A blue arrow labeled 'I.' points to the first row of the table.

- 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.

<p>Message Identifier: Please enter an identifier for this message <input type="text"/></p> <p>Subject*: Enter the subject of the email message. <input type="text" value="Test Message"/></p> <p>From*: Please enter the e-mail address which will be used in the from field. <input type="text" value="test@simplicity.com"/></p> <p>Cc: Address(es) who should be carbon copied <input type="text"/></p> <p>Bcc: Address(es) who should be blind copied <input type="text"/></p> <p>HTML Format: Do you wish to format this message using HTML? <input type="radio"/> yes <input checked="" type="radio"/> no</p> <p>Message Body*: Please enter the message body, including any substitution fields <input type="text" value="test"/></p>	<p>AVAILABLE FIELDS</p> <p>[fullname] [fname] [mi] [lname] [phone] [fax] [email] [password] [date] [tab]</p> <p>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.</p>
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- 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

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.

