

Electronic Subcontracting Reporting System (ESRS) Contractor Guide 1.9

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Table of Contents

Section 1: Log-in to ESRS.....	3
1.1 Existing Users	3
1.2 New Users	3
Section 2: myESRS	4
2.1 myESRS Page Features	4
2.2 Navigation Bar Overview	5
Section 3: Profile	6
Section 4: Contract Worklist	7
4.1 View Existing	7
4.2 Add New.....	8
Section 5: Individual Subcontract Reports (Prime)	9
5.1 View Existing	9
5.2 File New Individual Subcontract Report.....	10
Section 6: Summary Subcontract Reports (Prime)	11
6.1 View Existing	11
6.2 File New Summary Subcontract Report.....	12
Section 7: Filing Reports as a Sub Contractor	13
Section 8: Year-End Supplementary Report for SDBs	14
8.1 View Existing	14
8.2 File New Summary Subcontract Report.....	15
Section 9: SDB Participation Report (Form 312)	16
9.1 View Existing	16
9.2 File New Summary Subcontract Report.....	17
Section 10: Batch Uploads	18
Section 11: Trend Analysis Report	19
11.1 View Existing.....	19
11.2 Generate New	20

1. Log-In to ESRS

1.1 Existing Users

- I. Point your browser to <https://www.esrs.gov/>
- II. Click on "Contractor". You should see a screen similar to the one below.
- III. Login to ESRS by typing your e-mail address and password under the "returning contractors: login"
- IV. Click "Login"

1.2 New Users

- I. Point your browser to <https://www.esrs.gov/>
- II. Click on "Contractor"
- III. Click "Register" (Continued below screenshot)

Contractor Login Screen

IV. Note, throughout the system the red asterisk (*) designates that the field is required.

- V. Enter your DUNS Identification Number.
- VI. Click
- VII. Some data may already be populated from CCR. Please complete all fields on the form.
- VIII. Click on the button.
- IX. You will now be placed at the "Registration Step 2 of 2" page. An e-mail will be sent to the account that you specified on the previous step. Please follow the directions in the e-mail and confirm your account.
- X. After you have confirmed your registration, return to the login page.
- XI. Enter your e-mail address and password and click .

2. myESRS

After successfully logging in to ESRS, you will see a screen similar to the “myESRS Screenshot” below.

2.1 myESRS Page Features

- I. The Navigation bar at the top of the screen allows you to move through the system. Additionally, this bar is available on every screen throughout the system. For more information, please read “Section 2.2 Navigation Bar” for more information.
- II. The “Alerts” section will show messages that require your attention.
- III. Announcements are created by ESRS administrators.
- IV. The buttons on the left hand side of the screen allow you to quickly create a new ISR, SSR, or link a contract to your account. Please see the corresponding sections of this manual for more information.

myESRS Screenshot

The screenshot displays the myESRS interface within a Mozilla Firefox browser window. The browser title is "ESRS TEST - Mozilla Firefox". The page header features the eSRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR CONTRACTORS". A navigation bar at the top contains links for "myESRS", "Profile", "Contract Worklist", and "File / Review Reports". Below the navigation bar is a "home" link. The main content area is divided into two columns. The left column contains five buttons: "Add Contract to Worklist", "File ISR (FORMERLY SF-294)", "File SSR (FORMERLY SF-295)", "File Year-End Supplementary Report (FOR SDBs)", and "File SDB Participation Report (FORMERLY OF-312)". The right column contains three sections: "alerts" (with a red warning icon and "No current alerts"), "announcements" (with a speaker icon and a welcome message), and a status bar at the bottom right showing the date "Thursday, March 30, 2006 | 3:41 pm" and user information "User: contract1@symplicity.com | Logout". Four red arrows point to specific features: Arrow I points to the navigation bar, Arrow II points to the alerts section, Arrow III points to the announcements section, and Arrow IV points to the left-hand side buttons.

2.2 Navigation Overview



Please note, the eSRS uses the notion of “sticky-pages”. When you visit a section (e.g. Individual Subcontract Reports) and begin working on a report, and then click out of the section and go into another (e.g. Contract Worklist) you will remain on the same page in each section you visit as long as you are logged in. In other words, if you click back into “Individual Subcontract Reports”, you will remain at the last location you were prior to leaving the section.

myESRS:

myESRS will return you to the default home page upon login.

Profile:

The profile page allows you to edit your account and contact information. Please turn to “Section 3, Profile” of this manual for more information.

Contract Worklist:

The Contract worklist allows you to view all contracts that have been linked to your account. Please turn to “Section 4, Contract Worklist” of this manual for more information.

File / Review Reports:

Individual Subcontract Reports:

The Individual Subcontract Reports area allows you to add and review ISR’s. Please turn to “Section 5, Individual Subcontract Reports” of this manual for more information.

Summary Subcontract Reports:

The Summary Subcontract Reports area allows you to add and review SSR’s. Please turn to “Section 6, Summary Subcontract Reports” of this manual for more information.

Year-End Supplementary Report for SDBs

This section allows you to file and/or review Year-End Supplementary Report for SDBs. Please go to “Section 8, Year-End Supplementary Report for SDBs” of this manual for more information.



SDB Participation Report (Form 312)

This section allows you to file and/or review the optional SDB Participation Report (Form 312). Please go to “Section 9, Year-End Supplementary Report for SDBs” of this manual for more information.

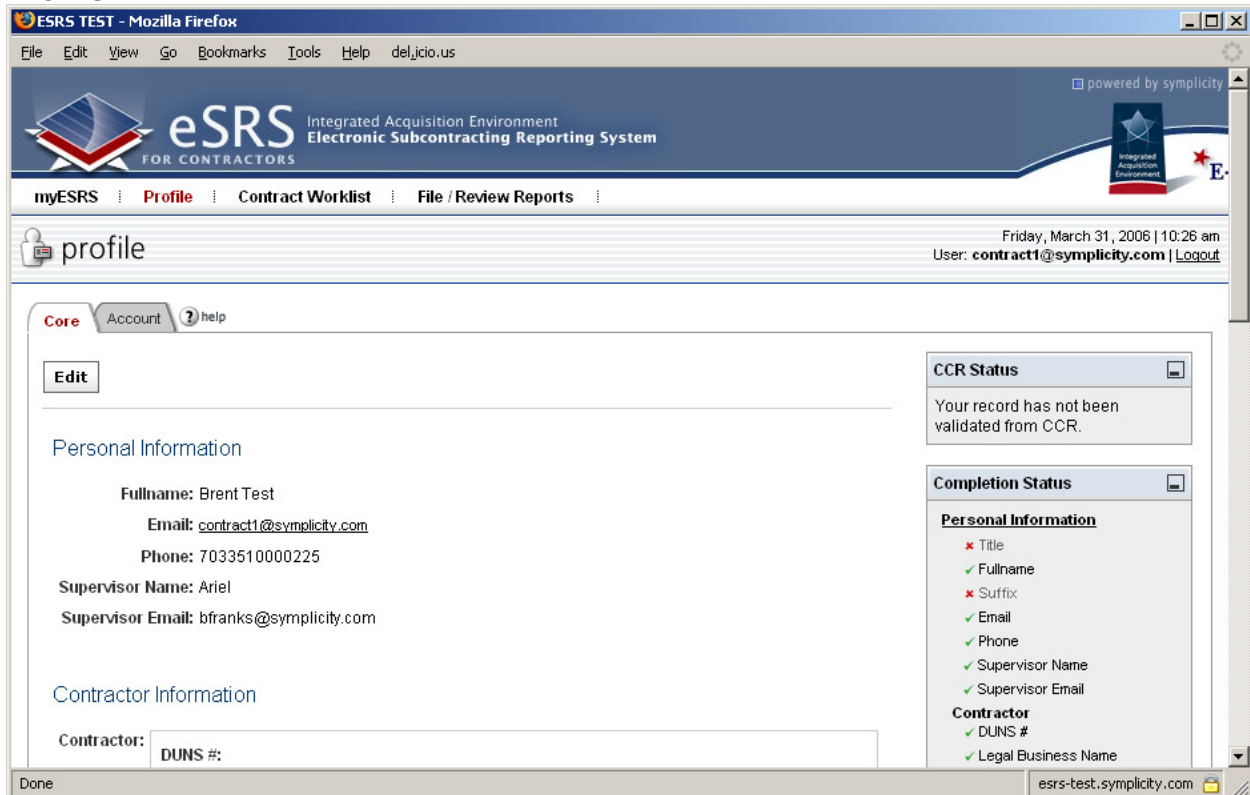
Batch Upload Reports

The batch upload section allows you to download a Microsoft® Excel™ template that can then be exported to a CSV (comma separated value) or tab delimited file and then imported into eSRS. This feature allows you to file multiple reports at once. Please see “Section 10, Batch Uploads” of this manual for more information.

3. Profile

- I. Click on "Profile" on the navigation bar.
- II. You can review your core contact information on this screen.
- III. To edit your information, simply click the  button.
- IV. After editing the information, click on the  button.
- V. **To change your password**, click on the "Account" tab near the top of the page.
- VI. You may enter your new password here. Click "Save Password" when done.

Profile



The screenshot shows the ESRS Profile page in a Mozilla Firefox browser window. The browser title is "ESRS TEST - Mozilla Firefox". The page header includes the ESRS logo and navigation links: "myESRS", "Profile", "Contract Worklist", and "File / Review Reports". The user is logged in as "contract1@symplicity.com".

The main content area is titled "profile" and includes tabs for "Core", "Account", and "help". An "Edit" button is visible. The profile information is organized into sections:

- Personal Information:**
 - Fullname: Brent Test
 - Email: contract1@symplicity.com
 - Phone: 7033510000225
 - Supervisor Name: Ariel
 - Supervisor Email: bfranks@symplicity.com
- Contractor Information:**
 - Contractor:
 - DUNS #:



On the right side, there are two status boxes:

- CCR Status:** Your record has not been validated from CCR.
- Completion Status:**
 - Personal Information:**
 - Title: ✗
 - Fullname: ✓
 - Suffix: ✗
 - Email: ✓
 - Phone: ✓
 - Supervisor Name: ✓
 - Supervisor Email: ✓
 - Contractor:**
 - DUNS #: ✓
 - Legal Business Name: ✓

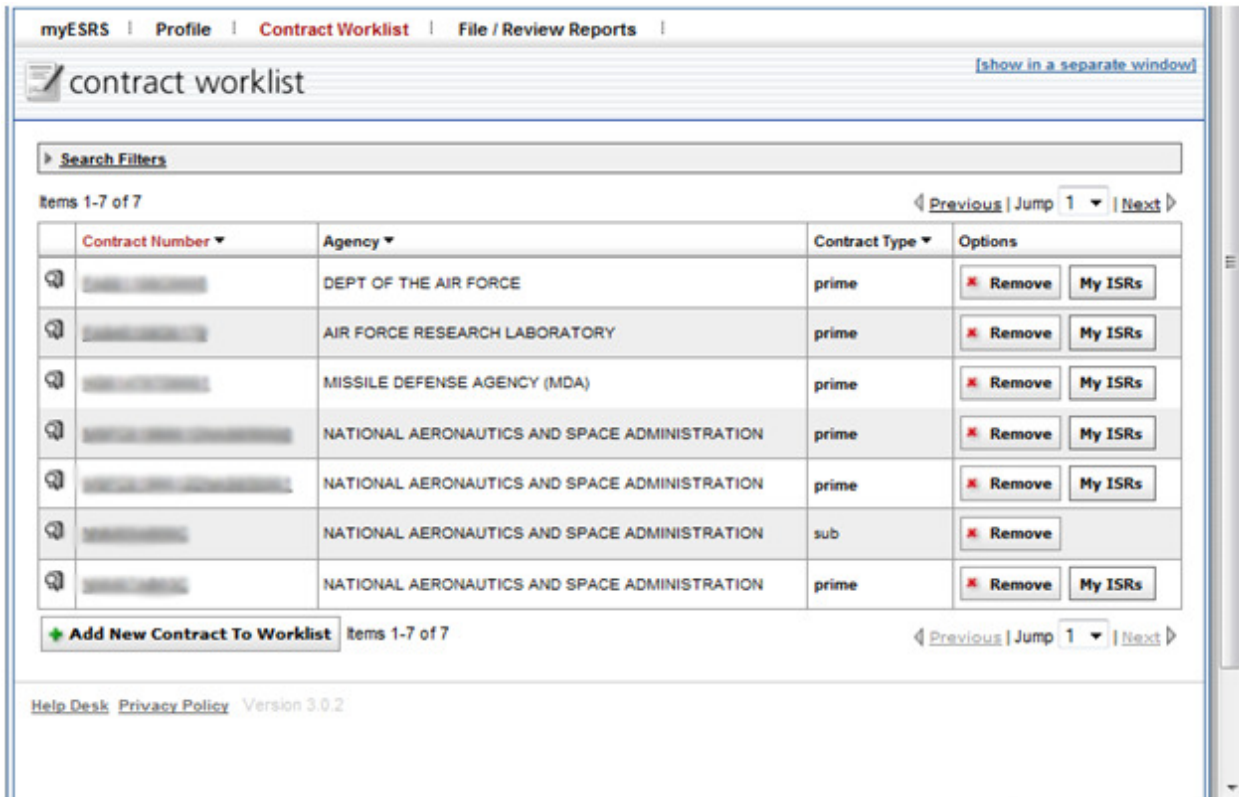
The browser status bar at the bottom shows "Done" and the address "esrs-test.symplicity.com".

4. Contract Worklist

4.1 View Existing

- I. Click on "Contract Worklist" on the navigation bar.
- II. A screen similar to the "Contract List Screenshot" below will appear.
- III. You may sort the list of contracts. 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.
- IV. To view the details of an existing contract, click on the  View Icon beside the contract, or click on the Contract Number.
- V. You are now able to review more information regarding the contract. If you wish to edit the information at this time, click on the  button next to the appropriate Contract Number from within the "My Contractor ISRs" tab .
- VI. You can also enter reports or view-lower tier reports. Click on the tabs beside the "Contract Details" tab to toggle between the views.
(Note: for more information regarding adding reports, please see the corresponding section of this manual)
- VII. After entering "Edit Mode" click the "Save" button to save your changes.

Contract List Screenshot

















myESRS | Profile | **Contract Worklist** | File / Review Reports | [\[show in a separate window\]](#)

contract worklist

Search Filters

Items 1-7 of 7 Previous | Jump 1 | Next




Contract Number ▼	Agency ▼	Contract Type ▼	Options
 [REDACTED]	DEPT OF THE AIR FORCE	prime	 Remove <input type="button" value="My ISRs"/>
 [REDACTED]	AIR FORCE RESEARCH LABORATORY	prime	 Remove <input type="button" value="My ISRs"/>
 [REDACTED]	MISSILE DEFENSE AGENCY (MDA)	prime	 Remove <input type="button" value="My ISRs"/>
 [REDACTED]	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION	prime	 Remove <input type="button" value="My ISRs"/>
 [REDACTED]	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION	prime	 Remove <input type="button" value="My ISRs"/>
 [REDACTED]	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION	sub	 Remove
 [REDACTED]	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION	prime	 Remove <input type="button" value="My ISRs"/>

Items 1-7 of 7 Previous | Jump 1 | Next

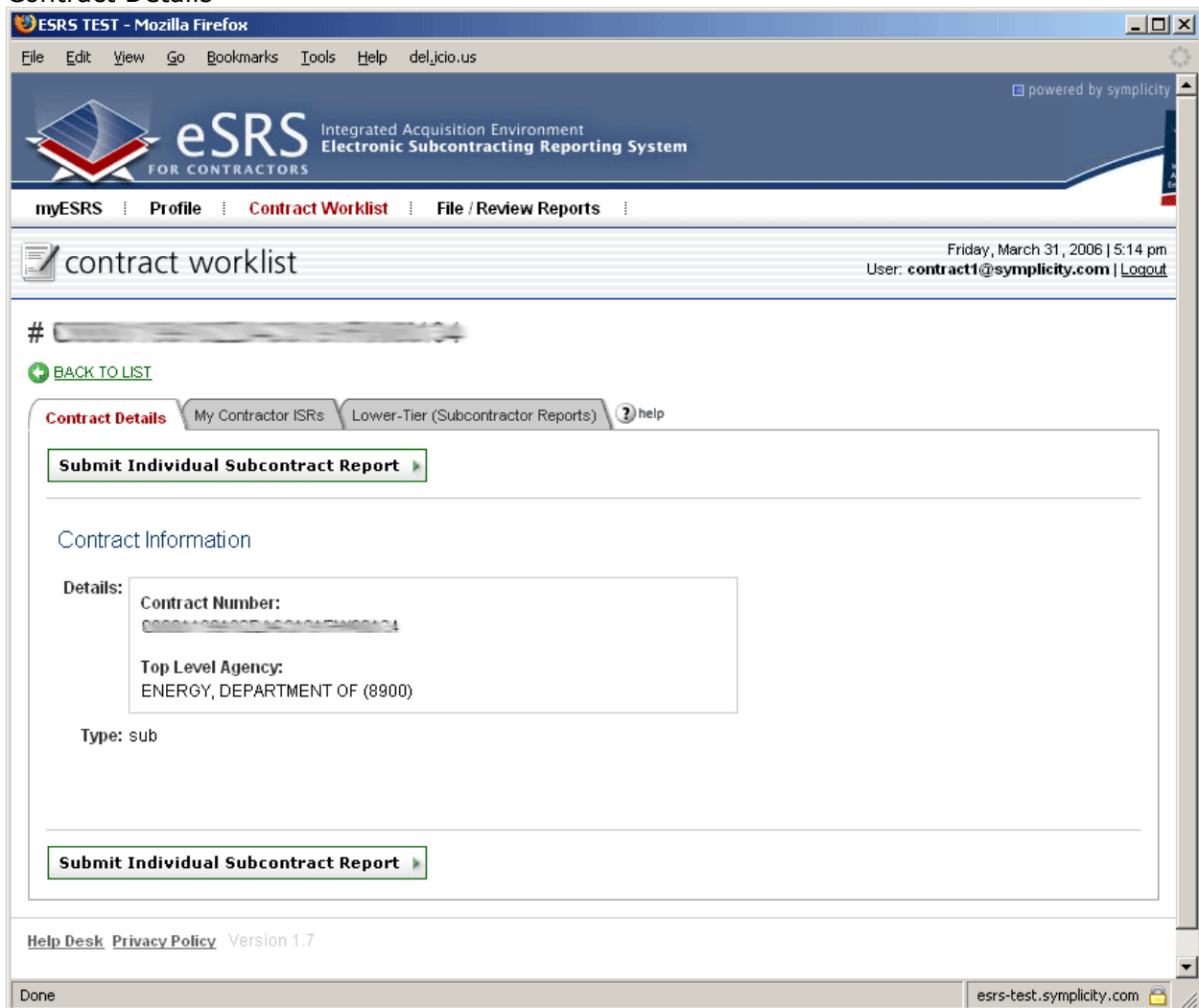
[Help Desk](#) [Privacy Policy](#) Version 3.0.2

4.2 Add New

There are two different methods to add a new contract to your account. The first method allows you to easily add a new contract from the "myESRS" homepage. Simply click on the "Add Contract to Worklist" button or follow the method below.

- I. Click on "Contract Worklist" on the navigation bar.
- II. To add a new contract to your worklist, click on the  button.
- III. Enter the Prime Contract # (as it appears in FPDS-NG). **Note: If a Contract # changes in FPDS-NG, you will only be able to search on the current #.**
- IV. Click .
- V. Select whether your organization is a "Prime" or "Subcontractor".
- VI. You will now be directed to the "contract details" page for the contract you just added. To return to the Contract Worklist, click on the  button within the system (note: do not click your browser's back button).

Contract Details

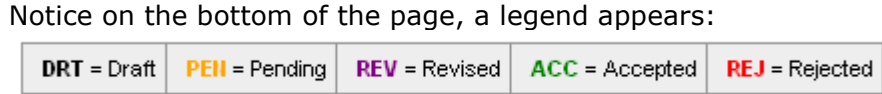


The screenshot displays the ESRS (Electronic Subcontracting Reporting System) interface. At the top, the browser window title is "ESRS TEST - Mozilla Firefox". The page header includes the ESRS logo and the text "Integrated Acquisition Environment Electronic Subcontracting Reporting System FOR CONTRACTORS". The navigation bar shows "myESRS", "Profile", "Contract Worklist", and "File / Review Reports". The main content area is titled "contract worklist" and includes a search bar with a blurred contract number and a "BACK TO LIST" button. Below the search bar are tabs for "Contract Details", "My Contractor ISRs", and "Lower-Tier (Subcontractor Reports)". A "Submit Individual Subcontract Report" button is visible. The "Contract Information" section shows details for a contract: "Contract Number: [blurred]" and "Top Level Agency: ENERGY, DEPARTMENT OF (8900)". The contract type is listed as "sub". Another "Submit Individual Subcontract Report" button is at the bottom of the details section. The footer includes "Help Desk", "Privacy Policy", and "Version 1.7". The browser status bar shows "Done" and the URL "esrs-test.symlicity.com".

5. Individual Subcontract Reports

5.1 View Existing

- I. Click on "File / Review Reports" on the navigation bar.
- II. Click on Individual Subcontract Reports on the drop down.
- III. You will be directed to a screen similar to the "Individual Subcontract Reports Screenshot" below.
- IV. The status for each report is displayed in the status column.



Draft: You began working on a report, however did not complete it and/or submit it for approval.

Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.

Revised: The report has been revised by a government official.

Accepted: A government official has accepted your report.

Rejected: A government official has rejected your report.

- V. To view the details of a submitted report, click on the Icon beside the report.
- VI. If the report has been rejected, you may click on the "Notes" tab to view the reason why the report has been rejected.
- VII. To return to the report list, click the "Cancel" button at any time.

Individual Subcontract Reports Listing

myESRS | Profile | Contract Worklist | File / Review Reports | [show in a separate window]

individual subcontract reports

Open Pending Closed All help

Search Filters

Status: [Dropdown] Date Created: [Text] [Select] [Clear] to [Text] [Select] [Clear]

Report Type: [Dropdown] Keywords: [Text] searches contract number, duns and vendor name

Agency: [Dropdown]

[Apply Search] [Save Defaults]




Items 1-20 of 20 [Previous] | Jump 1 | [Next]

Contract Number	Status	Submitted By	Type	Period	Year	Options
[Icon] [Contract Number]	DRT	Prime	regular		-	[Delete] [Copy Report]
[Icon] [Contract Number]	DRT	Prime	regular		-	[Delete] [Copy Report]
[Icon] [Contract Number]	DRT	Prime	regular	Sept 30	2007	[Delete] [Copy Report]
[Icon] [Contract Number]	DRT	Prime	regular	Sept 30	2008	[Delete] [Copy Report]
[Icon] [Contract Number]	DRT	Prime	regular		-	[Delete] [Copy Report]
[Icon] [Contract Number]	DRT	Prime	regular		-	[Delete] [Copy Report]
[Icon] [Contract Number]	DRT	Prime	regular		-	[Delete] [Copy Report]

5.2 File New Individual Subcontract Report

There are two different methods to file a new Individual Subcontract Report. The first method allows you to easily file a new Individual Subcontract Report from the "myESRS" homepage. Simply click on the "File ISR" (formerly SF 294)" button (shown to right) or follow the method below.



- I. Click on "File / Review Reports" on the navigation bar.
- II. Click on Individual Subcontract Reports on the drop down.
- III. To file a new report, click on the  button.
- IV. You will be taken to the Instructions page similar to the screenshot below. Please take time to read the instructions.
- V. Click on the  when ready.
- VI. Select a contract from the drop down box or manually enter the contract number. Click Continue. **Note: If a Contract # changed in FPDS-NG, you will only be able to search on the current #.**
- VII. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. (*Note, Click on the context sensitive  help button beside the fields for more information*)
- VIII. On step 8, click the Submit button to send the report.
- IX. You may now return to view existing reports (Section 5.1, p. 10) to view the status of the report you just entered.
- X. In order to completely submit the report, you must click "Submit" on step 8 (Designated on the left hand side of the screen) of the report submission process.

Note: On step 6 of the report submission process, you **must** fill out either the "Percentage of Total Subcontract Awards" OR "Percentage of Total Contract Value" field for Part 3. SMALL DISADVANTAGED BUSINESS (SDB) CONCERNS.

Instructions

 The screenshot shows the 'New Report' page for 'Individual Subcontracting Reports'. At the top, there is a navigation bar with 'myESRS | Profile | Contract Worklist | File / Review Reports'. Below this is a breadcrumb trail 'individual subcontract reports' and a 'Close Window' link. The main content area is titled 'New Report' and includes a 'BACK TO LIST' link. A vertical sidebar on the left contains a numbered list of steps: 1. Instructions, 2. Enter Contract #, 3. Contract Details, 4. Subcontracting Report, 5. Subcontracting Report Cont'd, 6. Subcontract Awards, 7. Review, and 8. Submit Report. The main content area is divided into sections: 'Individual Subcontracting Reports' with a 'Please Note' about new fields, 'For Prime Contractors' with a list of required information, 'For Lower Tier Subcontractors' with a list of required information, and 'Copy Existing Report' with a dropdown menu and 'Cancel' and 'Continue' buttons.

6. Summary Subcontract Reports

6.1 View Existing

- I. Click on "File / Review Reports" on the navigation bar.
- II. Click on Summary Subcontract Reports on the drop down.
- III. You will be directed to a screen similar to the "Summary Subcontract Reports Screenshot" below.
- IV. The status for each report is displayed in the status column.

Notice on the bottom of the page, a legend appears:

DRT = Draft	PEH = Pending	REV = Revised	ACC = Accepted	REJ = Rejected
--------------------	----------------------	----------------------	-----------------------	-----------------------


Draft: You began working on a report, however did not complete it and/or submit it for approval.

Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.

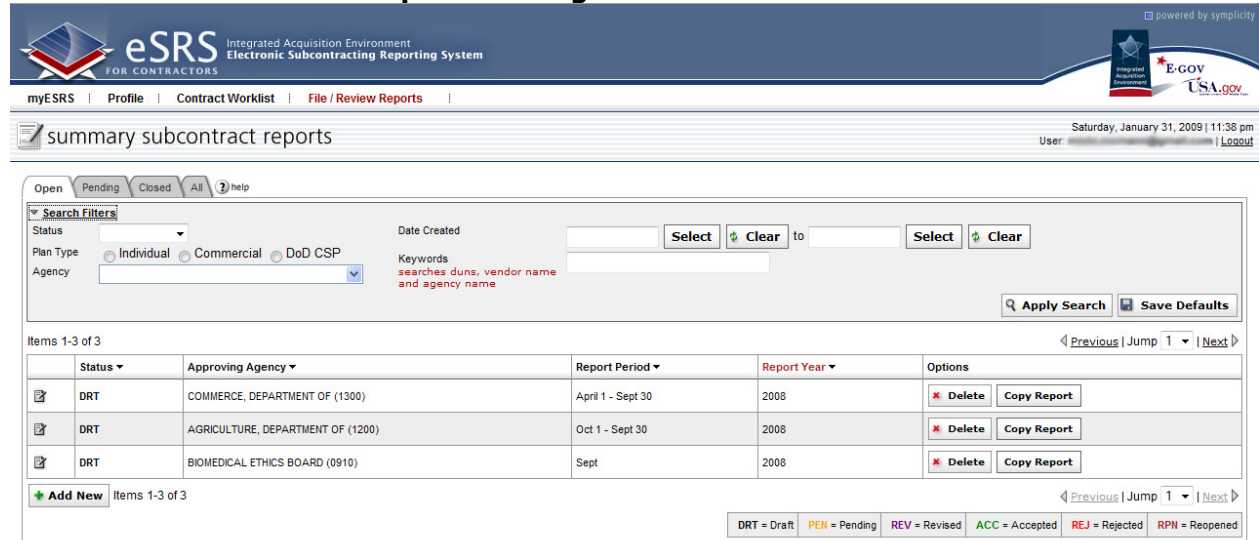
Revised: The report has been revised by a government official.

Accepted: A government official has accepted your report.

Rejected: A government official has rejected your report.

- V. To view the details of a submitted report, click on the  View Icon beside the report.
- VI. If the report has been rejected, you may click on the "Rejection Notes" tab to view the reason why the report has been rejected.
- VII. To return to the report list, click the "Cancel" button at any time.

Individual Subcontract Reports Listing



powered by simplicity

myESRS | Profile | Contract Worklist | File / Review Reports

summary subcontract reports

Saturday, January 31, 2009 | 11:38 pm

User: [redacted] | Logout

Open Pending Closed All ? help

Search Filters

Status: [dropdown] Date Created: [dropdown] Select Clear to [dropdown] Select Clear










Plan Type: Individual Commercial DoD CSP

Agency: [dropdown]

Keywords: searches duns, vendor name and agency name

Apply Search Save Defaults

Items 1-3 of 3

	Status	Approving Agency	Report Period	Report Year	Options
	DRT	COMMERCE, DEPARTMENT OF (1300)	April 1 - Sept 30	2008	 Delete  Copy Report
	DRT	AGRICULTURE, DEPARTMENT OF (1200)	Oct 1 - Sept 30	2008	 Delete  Copy Report
	DRT	BIOMEDICAL ETHICS BOARD (0910)	Sept	2008	 Delete  Copy Report

[Add New](#) Items 1-3 of 3




Previous | Jump 1 | Next

DRT = Draft PEN = Pending REV = Revised ACC = Accepted REJ = Rejected RPN = Reopened

6.2 File New Summary Subcontract Report

There are two different methods to file a new Summary Subcontract Report. The first method allows you to easily file a new SSR from the "myESRS" homepage. Simply click on the "File SSR" (formerly SF 295) button (shown to right) or follow the method below.



- I. Click on "File / Review Reports" on the navigation bar.
- II. Click on Summary Subcontract Reports on the drop down.
- III. To file a new report, click on the  button.
- IV. You will be taken to the instructions page similar to the screenshot below. Please take time to read the instructions.
- V. Click on the  when ready.
- VI. Select the Agency that you wish to file a report to. *(If the report is a commercial plan report, you can select multiple agencies. Please make sure to select an approver.)*
- VII. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. *(Note, Click on the context sensitive  help button beside the fields for more information)*
- VIII. On step 5, click the Submit button to send the report.
- IX. You may now return to view existing reports (Section 6.1, p. 11) to view the status of the report you just entered.

Instructions

 The screenshot shows a web browser window with the following content:

- Navigation bar: myESRS | Profile | Contract Worklist | File / Review Reports
- Page title: summary subcontract reports [show in a separate window]
- Section: New Report
- Buttons: BACK TO LIST
- Progress indicator: 1 Instructions, 2 Subcontracting Report, 3 Subcontract Awards, 4 Review, 5 Submit Report
- Section: Summary Subcontract Reports
- Text: **Please Note:** the eSRS contains a number of new fields that did not exist on the paper forms. Although the eSRS will allow you to save a partially completed report, you will save time if you have the following information available when you enter your report data:
- Section: For Prime Contractors
 - Approved Commercial Subcontracting Plan
 - Description of Product and Service
 - NAICS
 - Email address of the Federal Government Agency Representative responsible for reviewing the report
 - Be sure to keep a signed copy of the report on file
- Buttons: Cancel, Continue
- Footer: Help Desk Privacy Policy Version 3.0.2

7. Filing Reports as a Sub Contractor

Filing reports as a subcontractor allows the next higher tier contractor to see your filing. In order to correctly file a report as a "sub", first select the type of report you wish to file. Although the eSRS will allow you to save a partially completed report, you will save time if you have the following information available when you enter your report data:

- A.) The Prime Contract Number
- B.) The Sub Contract Number
- C.) The DUNS number of the contractor that awarded you the subcontract
- D.) E-mail address of the contractor's employee who awarded you the contract and has the responsibility to review your subcontracting report
- E.) Product and Service Description
- F.) NAICS
- G.) Approved Small Business Individual Subcontracting Plan
- H.) Be sure to keep a signed copy of the report on file

For a general overview of filing a New Individual Subcontract Report, please see **Section 5.2** (p. 10) of this manual.

For a general overview of filing a New Summary Subcontract Report, please see **Section 6.2** (p. 12) of this manual.

- I. Once you have begun filing your report (ISR or SSR) enter the contract number of the contract for which you wish to file.
- II. Once you have entered the contract number, click Continue.
- III. As a Subcontractor for this contract, you will now be forced to file as a "Sub". Notice that the selection "Prime" is unavailable.
- IV. Enter the DUNS# and e-mail address of the next available tier contractor.
- V. Enter the Contract Amount.
- VI. You may now progress through the report submission process by clicking the "Save and Continue" button after you have completed each step.
- VII. In order to completely submit the report, you must click "Submit" on step 8 (Designated on the left hand side of the screen) of the report submission process.

8. Year-End Supplementary Report for SDBs

8.1 View Existing

- I. Click on "File / Review Reports" on the navigation bar.
- II. Click on **Year-End Supplementary Report for SDBs** in the dropdown.
- III. You will be directed to a screen similar to the "Year End Section" below.
- IV. The status for each report is displayed in the status column.

Notice on the bottom of the page, a legend appears:

DRT = Draft	PEN = Pending	REV = Revised	ACC = Accepted	REJ = Rejected
--------------------	----------------------	----------------------	-----------------------	-----------------------


Draft: You began working on a report, however did not complete it and/or submit it for approval.

Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.

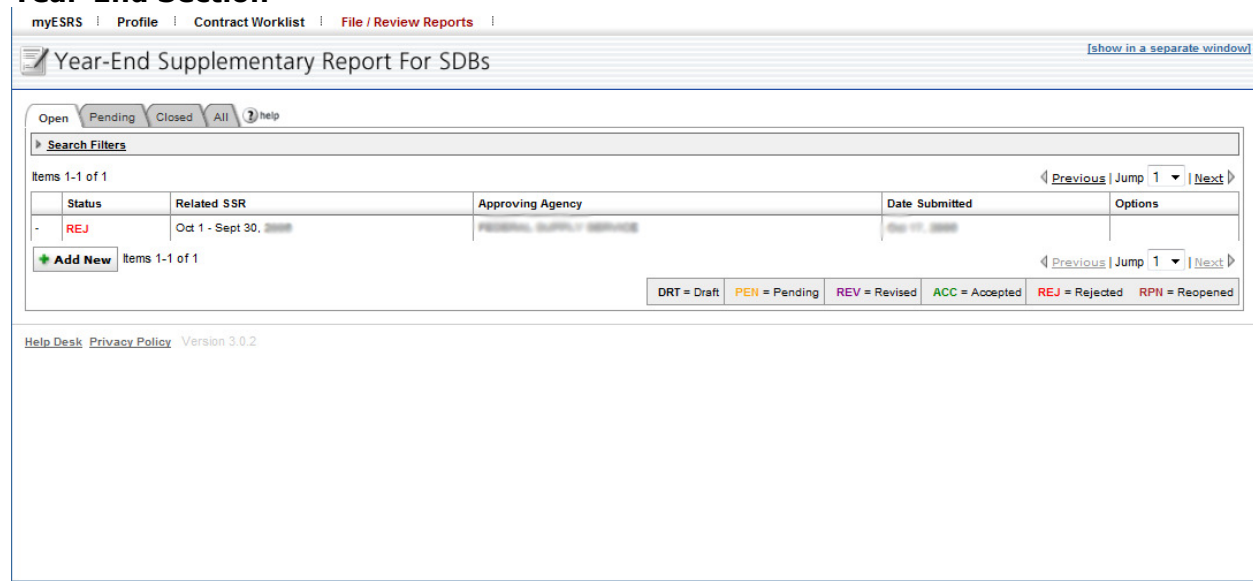
Revised: The report has been revised by a government official.

Accepted: A government official has accepted your report.

Rejected: A government official has rejected your report.

- V. To view the details of a submitted report, click on the  View Icon beside the report.
- VI. If the report has been rejected, you may click on the "Rejection Notes" tab to view the reason why the report has been rejected.
- VII. To return to the report list, click the "Cancel" button at any time.

Year-End Section



myESRS | Profile | Contract Worklist | File / Review Reports |

Year-End Supplementary Report For SDBs [\[show in a separate window\]](#)

Open Pending Closed All help

Search Filters

Items 1-1 of 1 [Previous](#) | [Jump 1](#) | [Next](#)

Status	Related SSR	Approving Agency	Date Submitted	Options
REJ	Oct 1 - Sept 30, 2008	FEDERAL SUPPLY SERVICE	4/21/2009	

[Add New](#) Items 1-1 of 1 [Previous](#) | [Jump 1](#) | [Next](#)




DRT = Draft PEN = Pending REV = Revised ACC = Accepted REJ = Rejected RPN = Reopened

[Help Desk](#) [Privacy Policy](#) Version 3.0.2

8.2 File New Year-End Supplementary Report

There are two different methods to file a new Year-End Supplementary Report. The first method allows you to easily file a new Year-End Supplementary Report from the "myESRS" homepage. Simply click on the "File Year-End Supplementary Report" button (shown to right) or follow the method below.



- I. Click on "File / Review Reports" on the navigation bar.
- II. Click on "Year- End Supplementary Reports for SDBs" on the drop down.
- III. To file a new report, click on the  button.
- IV. You will be taken to the instructions page similar to the screenshot below. Please take time to read the instructions.
- V. Click on the  when ready.
- VI. Select the Year-End Supplementary Report that the report should be associated with.
- VII. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. (*Note, Click on the context sensitive  help button beside the fields for more information*)
- VIII. On step 5, click the Submit button to send the report.
- IX. You may now return to view existing reports (Section 8.1, p. 14) to view the status of the report you just entered.

Instructions

The screenshot shows the eSRS interface for filing a report. At the top, there is a navigation bar with links for myESRS, Profile, Contract Worklist, and File / Review Reports. The main heading is "Year-End Supplementary Report For SDBs". Below this, there is a "New Report" section with a "BACK TO LIST" link. A sidebar on the left lists the steps: 1. Instructions (highlighted), 2. Subcontract Report, 3. Year-End Report, 4. Review, and 5. Submit Report. The main content area displays the title "Year-End Supplementary Report For SDBs" and a paragraph of instructions: "Pursuant to 48 CFR 52.219-9(j)(2), all Summary Subcontract Reports submitted at the close of each fiscal year (both individual and commercial plans) shall include a breakout, in the Contractor's format, of subcontract awards, in whole dollars, to small disadvantaged business concerns by North American Industry Classification System (NAICS) Industry Subsector". At the bottom of this section are "Cancel" and "Continue" buttons.

9. SDB Participation Report (Form 312)

9.1 View Existing

- I. Click on "File / Review Reports" on the navigation bar.
- II. Click on **SDB Participation Report** in the dropdown.
- III. You will be directed to a screen similar to the "**SDB Participation Report**" below.
- IV. The status for each report is displayed in the status column.

Notice on the bottom of the page, a legend appears:

DRT = Draft	PEH = Pending	REV = Revised	ACC = Accepted	REJ = Rejected
--------------------	----------------------	----------------------	-----------------------	-----------------------


Draft: You began working on a report, however did not complete it and/or submit it for approval.

Pending: The report has been submitted and is awaiting acceptance from the appropriate government official.

Revised: The report has been revised by a government official.

Accepted: A government official has accepted your report.



Rejected: A government official has rejected your report.

- V. To view the details of a submitted report, click on the  View Icon beside the report.
- VI. If the report has been rejected, you may click on the "Rejection Notes" tab to view the reason why the report has been rejected.
- VII. To return to the report list, click the "Cancel" button at any time.

SDB Participation Report

The screenshot displays the ESRS web application interface for viewing SDB Participation Reports. The browser window title is "ESRS TEST - Mozilla Firefox". The page header includes the ESRS logo and navigation links: myESRS, Profile, Contract Worklist, and File / Review Reports. The main content area is titled "SDB Participation Report (Optional Form 312)".

At the top of the report list, there is a search section with a "Status" dropdown menu and a "Keywords" input field, followed by an "Apply Search" button. Below this, the report list shows "Items 1-1 of 1". The table has columns for "Contract Number", "Status", "Related ISR", and "Options".




Contract Number	Status	Related ISR	Options
 DACW6702D1002	DRT	-	 Delete

Below the table, there is an "Add New" button and another "Items 1-1 of 1" indicator. At the bottom of the page, a legend identifies the report statuses: **DRT** = Draft, **PEH** = Pending, **REV** = Revised, **ACC** = Accepted, and **REJ** = Rejected. The footer includes links for "Help Desk" and "Privacy Policy", and the version number "Version 1.7".

9.2 File New SDB Participation Report

There are two different methods to file an optional SDB Participation Report. The first method allows you to easily file a new SDB from the "myESRS" homepage. Simply click on the "File SDB Participation Report" button (shown to right) or follow the method below.



- I. Click on "File / Review Reports" on the navigation bar.
- II. Click on "SDB Participation Reports" on the drop down.
- III. To file a new report, click on the  button.
- IV. You will be taken to the instructions page similar to the screenshot below. Please take time to read the instructions.
- V. Click on the  when ready.
- VI. Select the SSR that the report should be associated with.
- VII. Fill out the forms for each step and click "Save & Continue" or "Continue" to move to the next step of the process. (*Note, Click on the context sensitive  help button beside the fields for more information*)
- VIII. On step 6, click the Submit button to send the report.
- IX. You may now return to view existing reports (Section 9.1, p. 16) to view the status of the report you just entered.

File SDB Report

 The screenshot shows a web browser window titled "ESRS TEST - Mozilla Firefox". The page header includes the eSRS logo and navigation links: "myESRS", "Profile", "Contract Worklist", and "File / Review Reports". The main heading is "SDB Participation Report (Optional Form 312)". Below this is a "New Report" section with a "BACK TO LIST" link and a progress indicator showing steps 1 through 6. Step 4, "SDB Participation Report", is the current step. The main content area displays the title "SDB Participation by NAICS Industry Subsector Report" and a paragraph of instructions. At the bottom of the instructions area are "Cancel" and "Continue" buttons. The footer contains "Help Desk", "Privacy Policy", and "Version 1.7".

10. Batch Uploads

(For advanced users only)

The batch upload capability allows you to upload multiple reports (ISR / SSR) in one template.

- I. First download the type of report template you wish to use for batch upload.
- II. Modify the template in Microsoft Excel to include all contracts (ISR) or agencies (SSR) you wish to file for.
- III. Save the excel spreadsheet in a CSV or Tab Delimited file, using the Save As feature in Excel.
- IV. Place the file on a drive where you can access it later.
- V. Enter the Batch Upload Section.
- VI. Choose the Report Type (ISR / SSR)
- VII. Choose the Delimiter
- VIII. Click on Browse, and chose the file that you saved in Step III.
- IX. The file will begin uploading, and will display the result of your upload on screen.

Batch Upload Reports

powered by simplicity

myESRS | Profile | Contract Worklist | **File / Review Reports**

batch upload reports

Batch Upload Reports | Logs | help

Instructions: Please choose the report type that you would like to batch upload and specify the field delimiter in your data file. After your data file is ready to import, please use the "Browse" button to choose the file. Lastly, click "Upload Data" to start the import process.

Please use the following templates for uploading the different report types. The data must match the templates **exactly** for the import to process correctly. The templates provided are in excel format; after populating the template, you **MUST** save the file in Commas Separated (.csv) or Tab Delimited format by clicking "save as" and choosing one of the specified formats.

Note: The column "eSRS User Email Address" will be ignored and replaced with your eSRS email address when uploading reports within the system.

Templates

- [View ISR Data Template](#)
- [View SSR Data Template](#)

Upload Reports

Report Upload Settings * indicates a required field

Report Type*:

Delimiter*: Comma Separated (CSV) Tab Delimited

Data File*:

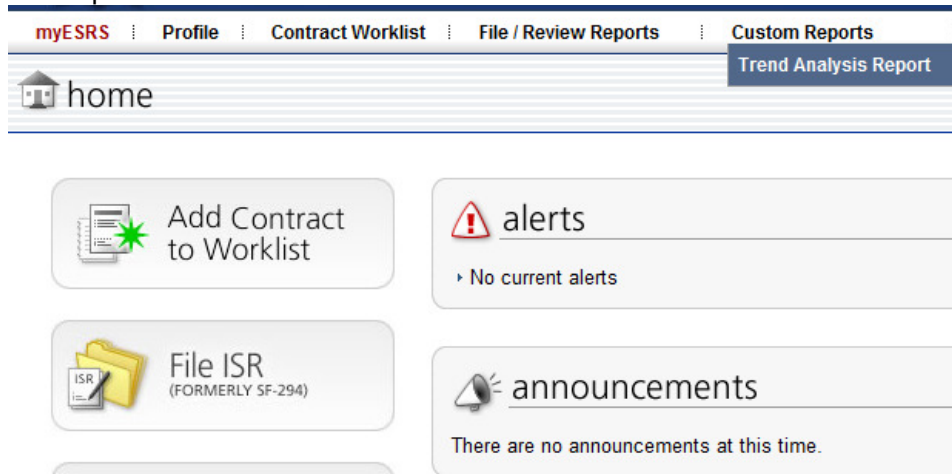
Upload Reports

11. Trend Analysis Report

This report pulls data from the "Accepted" Summary Subcontracting Reports (SSR) for plan type Individual and Commercial for reports **associated with your registered DUNS**. This report shows your average percentage and the percent change subcontracting trend over specified years in each socio-economic category.

11.1 View Existing

- I. Click the "Custom Reports" button in the top navigation and select "Trend Analysis Report."



- II. If desired, filter the list by Status and/or Keywords which search the label and description of a report. Click "Apply Search" button to obtain results or "Clear" to remove filter.
- III. You can sort by any of the columns with a black arrow in the header.
- IV. Click to view a report, to edit a report's settings, to regenerate the report, to view past versions of the report, to delete the report.

Searches label and description.

Items 1-2 of 2 ◀ Previous | Jump 1 | Next ▶

Options	Class ▼	Label ▼	Description	Last Modified ▲	Last Run ▲
	Trend Analysis Report	[Trend Analysis Report] Vendor Name / 2009-10-26 15:38:15		Oct 26, 2009 4:01 pm	Oct 26, 2009, 3:38 pm
	Trend Analysis Report	[Trend Analysis Report] Vendor Name / 2009-10-26 15:33:49		Oct 26, 2009 4:01 pm	Oct 26, 2009, 3:34 pm

Items 1-2 of 2 ◀ Previous | Jump 1 | Next ▶

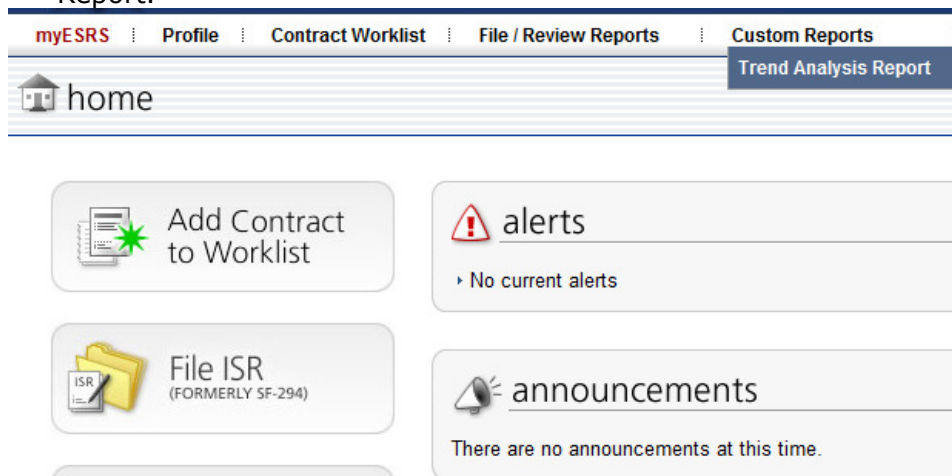
- V. When viewing a report, there will be five options at the top of the page:
 - a. "regenerate report" to process a new report instantly;
 - b. "open in new window" to open the report in a separate window;
 - c. "save as excel" to produce a pop-up with option to save or open the report as an excel file;
 - d. "change settings" to modify the current report settings;
 - a. "return to report list" to return to the main list of reports.

Note: A red "no data reported" value indicates that there are no Accepted reports in the system at the time the report is generated with the related data.

Category	2004 Total	2004 Percent	2005 Total	2005 Percent	2006 Total	2006 Percent	% Average	% Change
SB	3,843,676	70.9	1,396,668	94.4	No Data Reported	0.0	82.6	-100.0
LB	1,578,701	29.1	82,903	5.6	No Data Reported	0.0	17.4	-100.0
Total	5,422,377	100.0	1,479,571	100.0	No Data Reported	0.0	100.0	-100.0
SDB	3,019,774	55.7	274,700	18.6	No Data Reported	0.0	37.1	-100.0
WOSB	538,673	9.9	238,454	16.1	No Data Reported	0.0	13.0	-100.0
HBCU_MI	2,780,478	51.3	0	0.0	No Data Reported	0.0	25.6	-100.0
HUBZ	510,017	9.4	0	0.0	No Data Reported	0.0	4.7	-100.0
VOSB	251,529	4.6	0	0.0	No Data Reported	0.0	2.3	-100.0
SD_VOSB	251,139	4.6	0	0.0	No Data Reported	0.0	2.3	-100.0

11.2 Generate New

- I. Click the "Custom Reports" button in the top navigation and select "Trend Analysis Report."



- II. Click the "Add New" button in the bottom left of the page.

Note: You will only be able to generate a Trend Analysis Report for your registered DUNS.

myESRS | Profile | Contract Worklist | File / Review Reports | Custom Reports

Tuesday, October 20, 2009 | 10:50 p
User: [redacted] | [Logout](#)

Status: [dropdown] Keywords: [input]
Searches label and description.

No records found.

- III. Enter the desired label (or leave the default name) and optional description for the report.
- IV. Select a specific reporting period (Oct 1- March 31 or Oct 1 –Sept 30) by selecting from the drop-down menu under "Reporting Period Month"; remember commercial reports are not submitted during different months. If you do not select a specific "Reporting Period Month" all reporting months will be displayed in your report.
- V. Select the desired reporting period year(s) by selecting from the drop-down menu under "Reporting Period Year."
- VI. There are three options at the bottom:
 - a. Click "Submit" to process the report;
 - b. Click "Save & Continue" to save the report settings and return to the list;
 - c. Click "Cancel" to stop the action which will not save the report settings.

Reports will pull from **accepted** Summary Subcontracting Reports associated with your registered DUNS.

Save as: [Trend Analysis Report] Vendor Name / 2009-10-26 16:03:51 Max. on-screen rows)

Description: [input]

Step 2: Please select the fields and filters you wish to have included in your report.

▼ Base Class: Summary Subcontract Report

Reporting Period Month
filter ▼
Oct 1 - Mar 31 ▲
Oct 1 - Sept 30 ▼

Reporting Period Year
filter ▶
2004 ▼ to 2009 ▼

- VII. When the system is done processing the report, click "view report" to open the report in your browser.

Report Processed

Done!

- VIII. When viewing a report, there will be five options at the top of the page:
 - a. "regenerate report" to process a new report instantly;
 - b. "open in new window" to open the report in a separate window;

- c. "save as excel" to produce a pop-up with option to save or open the report as an excel file;
 - d. "change settings" to modify the current report settings;
 - b. "return to report list" to return to the main list of reports.
- IX. **Note:** A red "no data reported" value indicates that there are no Accepted reports in the system at the time the report is generated with the related data

Category	2004 Total	2004 Percent	2005 Total	2005 Percent	2006 Total	2006 Percent	% Average	% Change
SB	3,843,676	70.9	1,396,668	94.4	No Data Reported	0.0	82.6	-100.0
LB	1,578,701	29.1	82,903	5.6	No Data Reported	0.0	17.4	-100.0
Total	5,422,377	100.0	1,479,571	100.0	No Data Reported	0.0	100.0	-100.0
SDB	3,019,774	55.7	274,700	18.6	No Data Reported	0.0	37.1	-100.0
WOSB	538,673	9.9	238,454	16.1	No Data Reported	0.0	13.0	-100.0
HBCU_MI	2,780,478	51.3	0	0.0	No Data Reported	0.0	25.6	-100.0
HUBZ	510,017	9.4	0	0.0	No Data Reported	0.0	4.7	-100.0
VOSB	251,529	4.6	0	0.0	No Data Reported	0.0	2.3	-100.0
SD_VOSB	251,139	4.6	0	0.0	No Data Reported	0.0	2.3	-100.0