



eSRS Agency Coordinator (AC) User Guide

Last Updated March 20, 2018

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Revision Notes:

Revision	Date	Description
1.1	01/23/2015	Updates to Reporting Instructions manual refresh, corrections, and added references to additional resources for users.
1.2	01/19/2016	Updates to images, 90 day password reset requirement, and added the Threshold for reporting guidance.
1.3	03/20/2018	Updated to reflect password recovery enhancement, new Correct Report functionality, new Agency ad-hoc report and ISR pre-defined reports,
1.4	4/30/2018	Updated to include section 3.5.1 for taskorder review within Individual Subcontracting Reports

Table of Contents

SECTION 1 ESRS BASICS.....	6
1.1 SYSTEM BACKGROUND	6
1.2 ABOUT THIS USER GUIDE	6
1.3 GETTING HELP WITH ESRS.....	7
1.3.1 THE HELP DESK.....	7
1.3.2 RESOURCES PAGE.....	9
1.4 LOG-IN TO ESRS.....	10
1.4.1 SYSTEM TIED WITH FSRS	10
1.4.2 EXISTING USERS	10
1.4.3 NEW USERS	11
1.4.4 IMPORTANT PASSWORD UPDATE	16
1.5 TERMS OF USE AGREEMENT.....	16
SECTION 2 NAVIGATION OVERVIEW	17
2.1 HOME	17
2.2 MAIN NAVIGATION OVERVIEW	18
SECTION 3 REPORTS	19
3.1 INDIVIDUAL	19
3.1.1 AGENCY CONTRACT TRANSFERS.....	20
3.1.2 CONTRACT PIID CHANGES.....	21
3.2 SUMMARY.....	21
3.3 YEAR-END SDB.....	23
3.4 SDB PARTICIPATION	24
3.5 ACCEPT / REJECT (NO ADMINISTERING AGENCY DESIGNATED ON REPORT).....	25
3.5.1 REVIEWING TASK ORDER DATA	26



3.6 ACCEPT / REJECT (ADMINISTERING AGENCY DESIGNATED ON REPORT) 27

 3.6.1 ACCEPT/REJECT 27

 3.6.2 REQUEST TO RELEASE A REPORT 29

 3.6.3 RELEASE A REPORT 30

3.7 CORRECT REPORT (AWARDING AGENCY DESIGNATED ON REPORT) 31

SECTION 4 AGENCIES (ORGANIZATIONS) 32

 4.1 REVIEW ORGANIZATION HIERARCHY..... 32

 4.2 CREATING A CHILD AGENCY RECORD 33

 4.3 EDITING AN EXISTING AGENCY RECORD..... 34

 4.4 MANAGING OFFICE CODES 35

SECTION 5 AGENCY CONTACTS 36

 5.1 VIEW AGENCY CONTACTS..... 36

 5.2 GROUP LIST BY 37

 5.3 BATCH OPTIONS: MAIL..... 37

 5.4 BATCH OPTIONS: SAVE AS EXCEL 39

SECTION 6 CONTRACTS 41

 6.1 CONTRACTS LIST 41

 6.2 IMPORTANT THRESHOLD UPDATE 41

SECTION 7 MY ACCOUNT 42

 7.1 GENERAL INFORMATION 42

 7.2 REQUEST NEW ROLE/OFFICE FOR AN ACCOUNT 43

 7.3 CHANGE PASSWORD 44

SECTION 8 REPORTING 45

 8.1 BUILD NEW REPORTS 45



Section 1 eSRS Basics

1.1 System Background

As part of the President's Management Agenda for Electronic Government, the Small Business Administration (SBA), the Integrated Acquisition Environment (IAE), and a number of Agency partners collaborated to develop the next generation of tools to collect subcontracting accomplishments. This government-wide tool is known as the eSRS. This Internet-based tool will streamline the process of reporting on subcontracting plans and provide agencies with access to analytical data on subcontracting performance. Specifically, the eSRS eliminates the need for paper submissions and processing of the SF 294's, Individual Subcontracting Reports, and SF 295's, Summary Subcontracting Reports, and replaces the paper with an easy-to-use electronic process to collect the data.

To learn more, please review the home page materials that discuss the system's background, reporting requirements, and the eSRS legislation, regulations and OMB Guidance.

1.2 About this User Guide

This user guide is intended for the federal government users of the eSRS.gov system who have been assigned the role of Agency Coordinator. The guide will help these users utilize the system to review eSRS reports that have been submitted by prime and sub-contractors. Both Prime and Sub contractor reporting is completed in the eSRS.gov system.

There are four federal government user roles in this system. The roles in part reflect the activities that are performed in the eSRS.gov system. The federal government user roles are outlined as follows:

- Agency Coordinator –**AC** has full access to eSRS for their agency and below. Users can manage their agency hierarchy, other agency contacts, manage new agency contact registrations, review eSRS reports and run reports on data from their registered level and below.
- Point of Contact – **POC** - Users manage other agency contacts (but not the agency organization), manage new agency contact registrations, review eSRS reports and run reports on data from their registered level and below.
- Contracting Officer - **CO** - Users review eSRS reports and run reports on data from their registered level and below. In an eSRS Context, this role is likely more appropriate for users needing to review eSRS reports pertaining to contracts.
- Designated Government User - **DGU** users review eSRS reports and run reports on data from their registered level and below.

1.3 Getting Help with eSRS

1.3.1 The Help Desk

- I. Users can access the Federal Service Desk (FSD) directly from within the system. FSD is the help desk organization that provides help desk support for eSRS.gov.
- II. A link to the FSD is presented on the home page in the right-hand side bar. This link can also be found when logged into the system at the bottom of each page.

Navigation to Access FSD on eSRS.gov

Documents

User Guides

- » [eSRS Contractor Guide](#)
- » [eSRS Agency Coordinator Guide](#)
- » [eSRS CO Guide](#)
- » [eSRS POC Guide](#)
- » [eSRS DGU Guide](#)

Training Materials

- » [Quick Reference Guides](#)
- » [Webinars](#)

Sample Reports

- » [Sample ISR](#)
- » [Sample ISR Step by Step](#)
- » [Sample SSR](#)
- » [Sample SSR Step by Step](#)

News

What's New

- » Updated Batch Upload
- » [Training Webinars](#)

eSRS contract was awarded to Symploty Corporation, a certified 8(a) Small Business on January 5, 2005.

Viewer Software:
Some documents linked from this page are in PDF, Flash, or PowerPoint format. To view these files, you may need to download:

- » [Adobe Acrobat Reader](#)
- » [Adobe Flash Player](#)
- » [Microsoft PowerPoint Viewer 2007](#)

For more information, contact:

- » [Integrated Acquisition at GSA](#)

For questions about eSRS, contact:

- » [SBA Commercial Market Representative \(CMR\)](#)
- » [For Help: Federal Service Desk](#)



- III. Clicking on the FSD link opens a transition page introducing the Federal Service Desk (FSD) where users can secure assistance.

FSD Transition Page

The screenshot shows a transition page with a blue header containing the eSRS logo and text. Below the header is a dark blue banner with the "Federal Service Desk" logo and the text "Start here for help on US Government contracts." Below this banner, a message states: "You will be re-directed to the Federal Service Desk in 30 seconds. Click the logo above if you would like to be redirected immediately." The main content area is white and contains the following text:

INTRODUCING...

The Federal Service Desk

eSRS Users:

We are pleased to introduce you to a new source of help for your questions concerning the Electronic Subcontracting Reporting System (eSRS). Although FSD will be handling technical calls only, you will be able to submit a non-technical question via the "Submit New Request" or speak to a representative to receive the email address of the eSRS Agency Coordinator and Point of Contact for the Agency you are reporting to or the Small Business Administration's (SBA) Procurement Analyst assigned to answer Subcontracting questions.

The Federal Service Desk (FSD) launched in June 2009 as a project of the GSA's Integrated Acquisition Environment (IAE). At the Federal Service Desk (fsd.gov) you can now:

- Find information you need by searching several ways in the Answer Center
- Submit a request online for Non-Technical (Policy) and Technical service
- Check on your help desk ticket online
- Give us feedback on Frequently Asked Questions
- Chat live with a Customer Service Representative
- Phone us toll free at 1-866-606-8220
- Phone us internationally at 334-206-7828

Over the next year or so, additional systems will gradually transition to FSD for their help desk support. We hope you take advantage of the full range of services offered at www.fsd.gov.

[Privacy Policy](#)

- IV. Users are automatically re-directed to the FSD 30 seconds after navigating to the transition page.



1.3.2 Resources Page

- I. When logged into the system, in the main navigation bar at the bottom of any system page, users will see a link to access a resources page. This page presents resources for the user related to the utilization of the eSRS system.

Resources Page

Resources

Quick Reference Guides

- [Quick Reference for Federal Government Contractors Filing SSR for Commercial Plan](#)
- [Quick Reference for Federal Government Contractors Filing SSR for Individual Plan](#)
- [Quick Reference for Federal Government Contractors Submitting SDB Participation Report](#)
- [Quick Reference for Federal Government Contractors Submitting SDB Year-End Report](#)
- [Quick Reference for Federal Government Prime Contractors Filing ISR](#)
- [Quick Reference for Federal Government Subcontractors Filing ISR](#)
- [Quick Reference Recommendation for Federal Government Employees Generating Reports](#)

Webinars

<p>For Contractor Users:</p> <ul style="list-style-type: none">• Contractor Submitting an Individual Subcontract Report (ISR)• Contractor Submitting an Summary Subcontract Report (SSR - Individual)	<p>For Government Users:</p> <ul style="list-style-type: none">• Government Review of the Individual Subcontract Report (ISR)• Government Review of the Summary Subcontracting Report (SSR)
--	--

- II. On this page, users will find Quick Reference Guides and Webinars.



1.4 Log-In to eSRS

1.4.1 System Tied with FSRS

Users registered in the Federal Funding Accountability and Transparency Act Subaward Reporting System (www.fsr.gov) are able to access the eSRS system with the same log-in credentials as used for FSRS. If you register for a new account in the eSRS system, you will be able to login to the FSRS system with the same credentials. In addition, authenticated (logged-in) users are able to toggle between the eSRS.gov and FSRS.gov applications seamlessly by clicking on the link in the upper right hand corner of any page, “Log-in to eSRS” or “Log-in to FSRS,” depending on the system in which you are currently working.

FSRS Log-In Link when Logged into eSRS.gov



1.4.2 Existing Users

- I. Point your browser to <https://www.esrs.gov>
- II. Click on Government in the Log-In or Register Now box
- III. Login to ESRS by typing your e-mail address and password.
- IV. Click Go

eSRS Log-In or Register Now



Government User Sign-In

Welcome Government Users

FSRS Sign-In **Register** Forgot my password

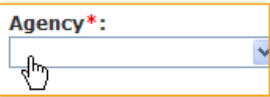
Instructions

Agency
Select your agency from the drop-down list. Agencies are organized hierarchically.

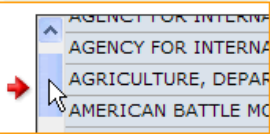
How-To:

- Click on the Agency select list.

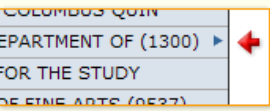
Agency*:



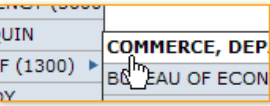
- Use the scroll bar on the left side to find your agency



- An agency with an arrow on the right (▶) indicates a submenu with subagencies you may select.



- The submenu always begins with the parent agency in bold. You may select the parent agency here, or choose a subagency below it.



Government User Registration Wizard

Agency*:

ASSISTANT SECRETARY FOR ADMINISTRATION (12B0) ▼

[Go Back](#) [Continue](#)

- VI. Throughout the registration process a “Progress” bar is provided on the right hand side of each page. At any time in the process you can link on one of the hyperlinks and you will be taken to that step of your registration.

Government Registration Progress side bar

Progress

Agency:
ASSISTANT SECRETARY FOR
ADMINISTRATION (12B0)

Your Full Name:
Empty

Your Suffix:
Empty

The Title of Your Position:
Empty

Your Email Address:
Empty

Supervisor Name:
Empty

Supervisor Email:
Empty

User Level:
Empty

Permission Level/Role:
Empty

Desired Password:
Empty

Repeat Desired Password:
Empty

Would you like to register for
multiple roles/offices?:
Empty

VII. On Step 2, the registration form will ask for your Name, Position and Email address.

Government Registration Step 2

Welcome Government Users

FSRS Sign-In **Register** Forgot my password

Instructions

Your Full Name
Please enter your full name.
Example: John F. Smith

Your Suffix
If applicable, enter your suffix

The Title of Your Position
Enter the title of the position you hold at your agency.

Your Email Address
Enter your email address.
Example: john@agency.gov

Government User Registration Wizard

Your Full Name*:

Your Suffix:

The Title of Your Position:

Your Email Address*:

- VIII. Users must complete all required fields and click the Continue button.
- IX. On Step 3, the user is required to provide their Supervisor's Name and Email Address.
- X. On Step 4, the user is required to determine the level of their account assignment within their agency.
- XI. On Step 5, the user is required to select their Permission Level/Role.
- XII. On Step 6, the user is required to set the Password for their account. **Note: Remember your username is your registered email address entered in step 1.**
- XIII. On Step 7, the user is prompted regarding multiple role/offices designations for their account. If Yes, is selected a new form will display asking the user to complete the required agency, user level and role information again. This process can be repeated for as many roles the user requires to manage their agency's contracts and grants.
- XIV. On the Final Step the user will be prompted to review their selected information and then click the submit registration button

Government Review Registration

Welcome Government Users

FSRS Sign-In **Register** Forgot my password

Instructions

Verify Your Entries

Verify all entered information. If any information is not correct, press "Go Back" or click on the item to go directly to it. You will have a chance to review again before you submit this form.

Government User Registration Wizard

Please verify all entered information and submit this form now.

<u>Agency:</u>	ASSISTANT SECRETARY FOR ADMINISTRATION (12B0)
<u>Your Full Name:</u>	User Guide
<u>Your Suffix:</u>	Empty
<u>The Title of Your Position:</u>	Empty
<u>Your Email Address:</u>	user@guide.gov
<u>Supervisor Name:</u>	Tester Govt
<u>Supervisor Email:</u>	tester@gov.gov
<u>User Level:</u>	User Level agency
<u>Permission Level/Role:</u>	Agency Coordinator (AC)
<u>Desired Password:</u>	***** (hidden)
<u>Repeat Desired Password:</u>	***** (hidden)
<u>Would you like to register for multiple roles/offices?:</u>	Would you like to register for multiple roles/offices? No

- XV. Once the user has submitted their registration they will have to complete an email verification step. Once they have verified their registration via email, an email will be sent to the registered agency coordinators authorized to approve registrations for the agency.



- XVI. When the user's registration has been approved they will receive an email from the system notifying them that they can now access the system. **Note: This grants the user access to both eSRS AND FSRS with the role(s) they registered.**

1.4.4 Important Password Update

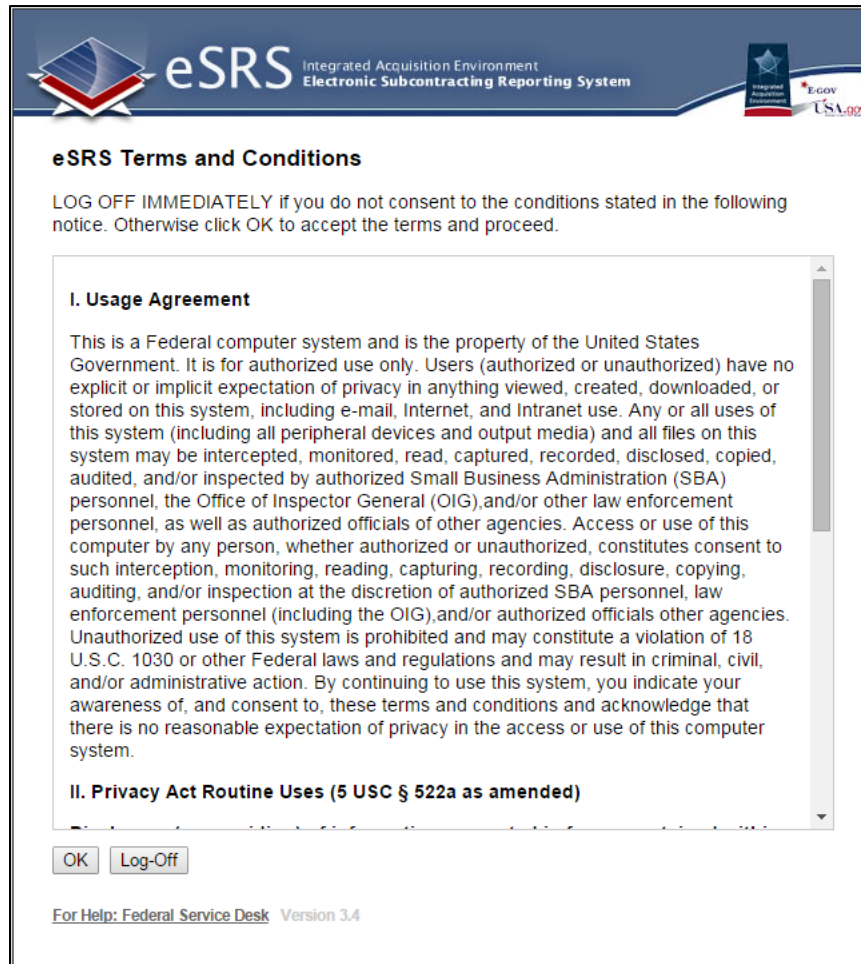
Users and Interfacing Systems must reset their passwords as required every 90 days or the account will be disabled IAW GSA IT Security Policy, (CIO P 2100.1). Registered users will receive an email notification to remind them of this requirement. If the user attempts to log in with an expired password, a tool tip will appear with a hyperlink. Click on the link to go through the password recovery process. If your account has been disabled, contact the Federal Service Desk at 866-606-8220 (Monday - Friday 8 a.m. to 8 p.m. ET).

NOTE: If your account was re-enabled after contacting the FSD, you must reset your password before midnight on the day of the call to prevent it from being disabled once again.

1.5 Terms of Use Agreement

- I. All users are required to agree to the Terms of Use for eSRS.
- II. Use the side scroll bar resource to review the terms and conditions in their entirety.
- III. A user can click "OK" to move forward or "Log-Off" to exit the system.

Terms of Use Agreement Screen



eSRS Terms and Conditions

LOG OFF IMMEDIATELY if you do not consent to the conditions stated in the following notice. Otherwise click OK to accept the terms and proceed.

I. Usage Agreement

This is a Federal computer system and is the property of the United States Government. It is for authorized use only. Users (authorized or unauthorized) have no explicit or implicit expectation of privacy in anything viewed, created, downloaded, or stored on this system, including e-mail, Internet, and Intranet use. Any or all uses of this system (including all peripheral devices and output media) and all files on this system may be intercepted, monitored, read, captured, recorded, disclosed, copied, audited, and/or inspected by authorized Small Business Administration (SBA) personnel, the Office of Inspector General (OIG), and/or other law enforcement personnel, as well as authorized officials of other agencies. Access or use of this computer by any person, whether authorized or unauthorized, constitutes consent to such interception, monitoring, reading, capturing, recording, disclosure, copying, auditing, and/or inspection at the discretion of authorized SBA personnel, law enforcement personnel (including the OIG), and/or authorized officials other agencies. Unauthorized use of this system is prohibited and may constitute a violation of 18 U.S.C. 1030 or other Federal laws and regulations and may result in criminal, civil, and/or administrative action. By continuing to use this system, you indicate your awareness of, and consent to, these terms and conditions and acknowledge that there is no reasonable expectation of privacy in the access or use of this computer system.

II. Privacy Act Routine Uses (5 USC § 522a as amended)

OK Log-Off

For Help: [Federal Service Desk](#) Version 3.4

Section 2 Navigation Overview

2.1 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.
- VI. If you are tied to multiple agencies/offices you will need to use the Switch Role function found at the top of any logged in page. This will allow you to manage your reports and users across multiple agencies/offices to which you are assigned.

Example Agency Coordinator Homepage

Pending Actions

- 0 New Agency Contact Registrations
- 1038 Individual Report(s) Pending
- 550 Summary Report(s) Pending
- 1740 Year-End Report(s) Pending
- 287 SDB Participation Report(s) Pending

Note: Some pending Summary and Year-End Reports may not require action on your part, but should be reviewed for accuracy.

Announcements

NASA Class Deviation on SSRs Aug 18, 2014 3:36 pm
 On November 21, 2013, NASA issued a Class Deviation for Summary Subcontract Report (SSR)-Submission under Individual Subcontracting Plans, which eliminates the requirement to submit a mid-year SSR for individual plans. The Deviation applies to solicitations issued on or after November 21, 2013. For contractors holding NASA contracts that were awarded before this date and that contain subcontracting plans, a mid-year SSR is still required unless all such contracts are modified to include the Deviation. Contractors may request Contracting Officers to modify existing contracts to include the Deviation. For additional information, refer to NASA Procurement Information Circular (PIC) 13-06B located here: <http://www.hq.nasa.gov/office/procurement/regs/pic13-06B.html>. Questions may be directed to Richard Mann at 202-358-2438.

eSRS - Last Updated Jan 24, 2015 11:56 am	
Agencies	2
Agency Contacts	22757
Accepted ISRs	33842
Accepted SSRs	17105
Accepted Year-Ends	4924
Accepted SDBs	116

Switch Role Function

Switch Role | Log-in to FSRS | Logout

- [cancel]
- AGRICULTURE, DEPARTMENT OF 1200 (POC)
- GENERAL SERVICES ADMINISTRATION 4700 (Super-User)
- DEPT OF DEFENSE 9700 (Super-User (DOD))

2.2 Main Navigation Overview

The federal government user’s main navigation runs vertically along the left side of the screen.

Home: Home returns a user to the default home page (same as seen on login).

Reports: The Reports section allows a user to review eSRS Reports. Users tied to multiple agencies/offices will need to use the switch role function in order to manage reports under their various roles.

Agencies:

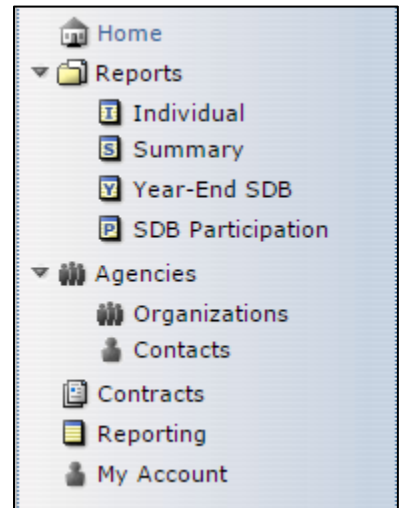
Organizations: Users will see their agency hierarchy including all Sub-Agencies. The eSRS/FSRS agency hierarchy is imported and updated daily from FPDS-NG.

Contacts: Users will see a list of all registered eSRS agency users. Only those users registered at the user's level and below can be edited by the user. All other records will be view only.

Contracts: Provides a searchable list of contracts issued by their agency. Users tied to multiple agencies/offices will need to use the switch office function to view the contracts list for their other assigned agency/office if their role allows.

Reporting: Resource allows users to run ad hoc and pre-defined reports. See Generating Reports Guide for more information.

My Account: Resource allows user to update their profile data, change their password, or to request a new role/office affiliation for their account.



Section 3 Reports

3.1 Individual

- I. Click on "Reports" and then "Individual" on the left hand navigation menu.
- II. You will see a screen similar to the Individual Reports Screenshot below.

- III. Click on the View Icon beside any report to see more information regarding the filed report.
- IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.
- V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.
- VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the “Next” or “Previous” links to traverse through the list.
- 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:
searches contract number, duns, vendor name, contracting office id and submitter email

Show Me: Prime Reports

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
[icon] [redacted]	UNIS CORPORATION	1220	Prime	RPN	regular	Mar 31	2006	03151	kathryn.nema@unis.com	Dec 20, 2006 10:05 am	<input type="button" value="Save PDF"/>
[icon] [redacted]	UNIS CORPORATION	1220	Prime	ACC - December 21, 2006 12:08 pm	regular	Sept 30	2006	03151	kathryn.nema@unis.com	Dec 20, 2006 10:10 am	<input type="button" value="Save PDF"/>
[icon] [redacted]	UNIS CORPORATION	1220	Prime	ACC - November 27, 2007 5:17 pm	regular	Sept 30	2007	03151	kathryn.nema@unis.com	Oct 26, 2007 11:23 am	<input type="button" value="Save PDF"/>
[icon] [redacted]	HAYWARD INC	12C2	Prime	REJ	final	Sept 30	2005	398	phillip@hayward.com	Jan 25, 2006 4:10 pm	<input type="button" value="Save PDF"/>
[icon] [redacted]	CONSTRUCTION CO INC	12B0	Prime	ACC - July 3, 2007 10:21 am	final	Mar 31	2007	3142	etomara@puma.com	Apr 24, 2007 2:28 pm	<input type="button" value="Save PDF"/>

3.1.1 Agency Contract Transfers

- I. Agencies have the ability to transfer a contract from one agency/office to another agency/office in FPDS-NG.
- II. When a contract is transferred to a new agency/office in FPDS-NG, ALL reports in the eSRS that were created PRIOR to the transfer, regardless of status (Draft, Pending, Accepted, Rejected,

Reopened), will remain associated to the former agency/office (the contract agency/office at the time of report creation).

- III. When a contract is transferred in FPDS-NG, the former agency/office will NOT have access to any new reports created in the eSRS AFTER the transfer took place.
- VIII. 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 perform a silent, nightly update of all existing reports, regardless of status, with the modified PIID/Contract number.
- III. 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 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.

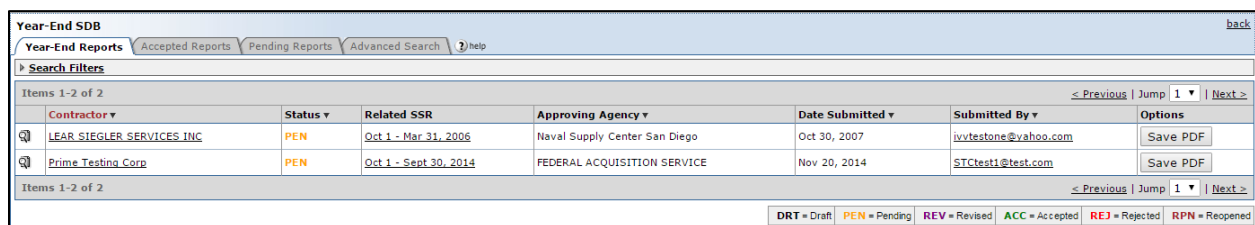
Summary Reports Screenshot

Summary back						
Summary Reports Accepted Summary Reports Pending Summary Reports Advanced Search help						
Search Filters						
Items 1-20 of 3896 < Previous Jump 1 Next >						
Contractor ▼	Status ▼	Approving Agency ▼	Report Period ▼	Report Year ▼	Submitted By ▼	Options
LORD CORPORATION	DRT	DEPT OF DEFENSE (9700)			mae.bartley@osd.mil	
Symp Tester	DRT	Micki Test Agency 01 (Micki01)			nadiapescosolido@gmail.com	
SOUTHLAND INDUSTRIES	DRT	()		2007	khashimoto@southlandind.com	
ANTEON CORPORATION	DRT	()		2007	gsaESRStest3@hotmail.com	
ANTEON CORPORATION	DRT	()		2007	gsaESRStest3@hotmail.com	
ANTEON CORPORATION	DRT	()		2007	gsaESRStest3@hotmail.com	

3.3 Year-End SDB

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

Year-End SDB Reports Screenshot



Year-End SDB back

Year-End Reports Accepted Reports Pending Reports Advanced Search help

Search Filters

Items 1-2 of 2 < Previous | Jump 1 | Next >

Contractor ▼	Status ▼	Related SSR	Approving Agency ▼	Date Submitted ▼	Submitted By ▼	Options
LEAR SIEGLER SERVICES INC	PEN	Oct 1 - Mar 31, 2006	Naval Supply Center San Diego	Oct 30, 2007	ivvtestone@yahoo.com	Save PDF
Prime Testina Corp	PEN	Oct 1 - Sept 30, 2014	FEDERAL ACQUISITION SERVICE	Nov 20, 2014	STCtest1@test.com	Save PDF

Items 1-2 of 2 < Previous | Jump 1 | Next >

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

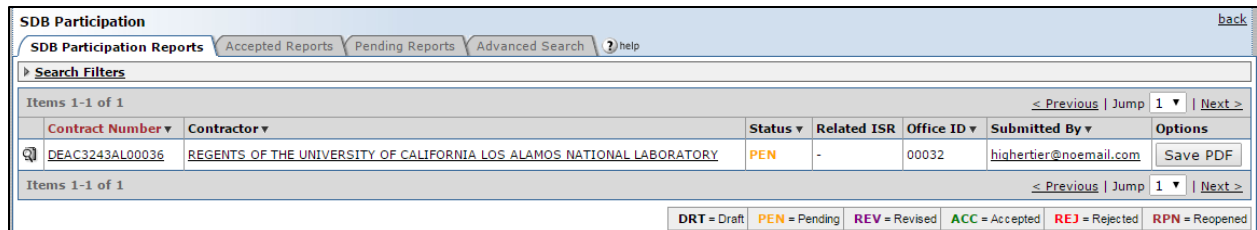
3.4 SDB Participation

- 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 'SDB Participation' interface. At the top, there are tabs for 'SDB Participation Reports', 'Accepted Reports', 'Pending Reports', 'Advanced Search', and 'help'. Below the tabs is a 'Search Filters' section. The main content area displays a table with one report entry. The table has columns for 'Contract Number', 'Contractor', 'Status', 'Related ISR', 'Office ID', 'Submitted By', and 'Options'. The 'Status' column for the entry is highlighted in maroon. Below the table, there is a legend for report statuses: DRT = Draft, PEN = Pending, REV = Revised, ACC = Accepted, REJ = Rejected, and RPN = Reopened.

Contract Number	Contractor	Status	Related ISR	Office ID	Submitted By	Options
DEAC3243AL00036	REGENTS OF THE UNIVERSITY OF CALIFORNIA LOS ALAMOS NATIONAL LABORATORY	PEN	-	00032	highertier@noemail.com	Save PDF

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

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



The screenshot shows the 'Summary' page for a 'SUMMARY SUBCONTRACT REPORT'. At the top, there are tabs for 'Core', 'Notes', 'Event Log', and 'help'. Below the tabs are three buttons: 'Return To List', 'View Printable Report', and 'Save PDF'. The main content area displays the report title and three fields: '1. Type of Plan: individual', '2. DUNS #: 613879068', and '3. Corporation, Company or Subdivision Covered:'. On the right side, there is a 'Report Actions' dropdown menu with options: 'Accept Report', 'Reject Report', and 'Report Submitted ()'.

3.5.1 Reviewing Task Order Data

In accordance with FAR Case 2014-003 eSRS has added the ability to review task order level data within Individual Subcontracting Reports. To review individual report task order data, navigate to the individual subcontracting report desired and select the magnifying glass next to the report. Scrolling down you will find the Subcontract Awards: Taskorders section where the task order data will be displayed.

- I. Select "Individual" under the Reports Folder in the left column
- II. Select the magnifying glass next to the desired report.
- III. Scroll down and you will see the Subcontract Awards: Taskorders section
- IV. Review data to ensure information displayed is correct

SUBCONTRACT AWARDS: Taskorders

Items 1-5 of 5

Task Order #	Whole Dollar Amounts	Notes
DJOJAG12007	<ul style="list-style-type: none"> • Small Business Concerns: \$11000 • Small Disadvantaged Business: \$21 • Women-Owned Small Business: \$26 • Historically Black Colleges and Universities and Minority Institutions: \$30 • HUBZone Small Business: \$36 • Veteran-Owned Small Business: \$40 • Service-Disabled Veteran-Owned Small Business: • Alaska Native Corporations (ANCs) and Indian Tribes (Not Certified): • Alaska Native Corporations (ANCs) and Indian Tribes (Not Small Businesses): • Large Business Concerns: \$2645 	
DJOOAAG13G0755	<ul style="list-style-type: none"> • Small Business Concerns: \$10500 • Small Disadvantaged Business: \$22 • Women-Owned Small Business: \$27 • Historically Black Colleges and Universities and Minority Institutions: \$31 • HUBZone Small Business: • Veteran-Owned Small Business: \$41 • Service-Disabled Veteran-Owned Small Business: \$45 • Alaska Native Corporations (ANCs) and Indian Tribes (Not Certified): • Alaska Native Corporations (ANCs) and Indian Tribes (Not Small Businesses): • Large Business Concerns: \$473 	

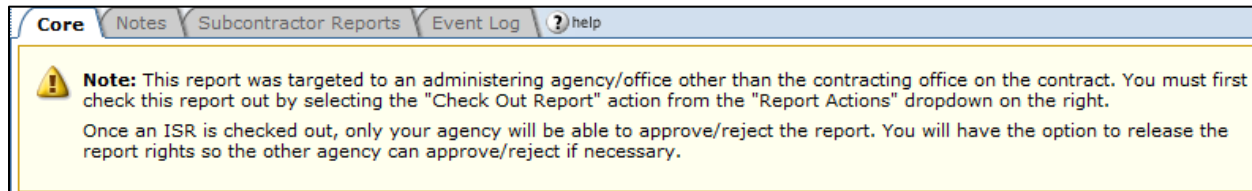
Please note: Master level contracting officers are responsible for evaluating the order data in the Individual Subcontracting Report.

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.

Administering Agency conflict message



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

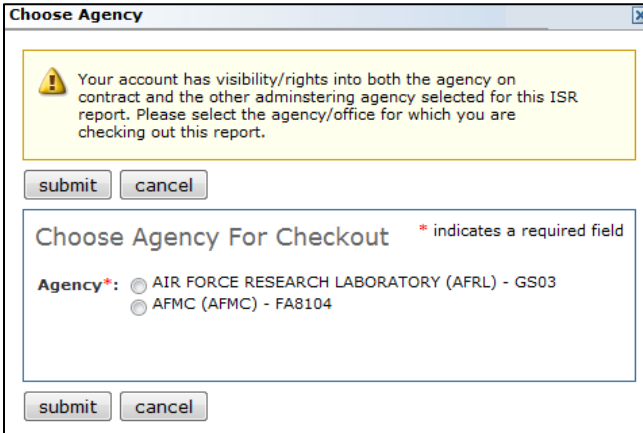
- I. Click on the View Icon beside the desired report.
- II. Select “Check Out Report” from the “Report Actions” drop down box on the right (see Report Actions screenshot below) and click the “Go” button. **Note: If you check out the report, only your agency/office will have accept/reject rights for 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.**



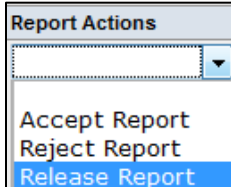
Note: If you are registered at a level above both the Contracting Office on the contract AND the designated Administering Agency in the report, you will be required to select the Agency/Office

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).

Agency Selection Pop-Up Window



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



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

3.6.2 Request to Release a Report

- I. Click on the View Icon beside the desired report.
- II. At any given time, the Contracting Office and Administering Agency users can view which agency currently has the report checked out, and therefore are able to manage the report. There is a "Report Rights" box visible on the right sidebar for all reports that have an administering agency designated by the contractor on the report.
 - 2.6 A red X will display next to the agency that does NOT have the report checked out.
 - 2.7 A green check mark will display next to the agency that currently has the report checked out.

Report Rights		
Contracting Office Agency	AIR FORCE RESEARCH LABORATORY (AFRL) - GS03	✘
Admin Agency	AFMC (AFMC) - FA8104	✔

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

Report Checked-Out by a different agency

Core Notes Subcontractor Reports Event Log ? help

Note: This report was targeted to an administering agency/office other than the contracting office on the contract. Currently, AFMC (AFMC) - Contracting Office: FA8104 has checked out this report and has approval/rejection rights.
If you would like to send an email message to the government user that checked out the report, requesting access to approve/reject, [click here to send email](#)

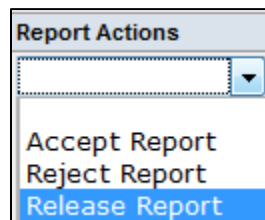
After clicking on the "click here to send email" link, your email client will generate a new email message with the "To" and "Subject" fields pre-populated. The email will be sent to the agency user who currently has the report checked out with the subject "Request Access to ISR Report."

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

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

3.6.3 Release a Report

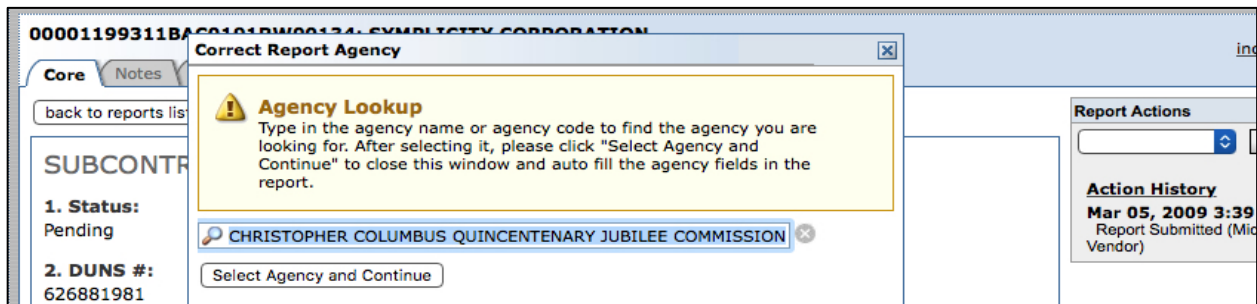
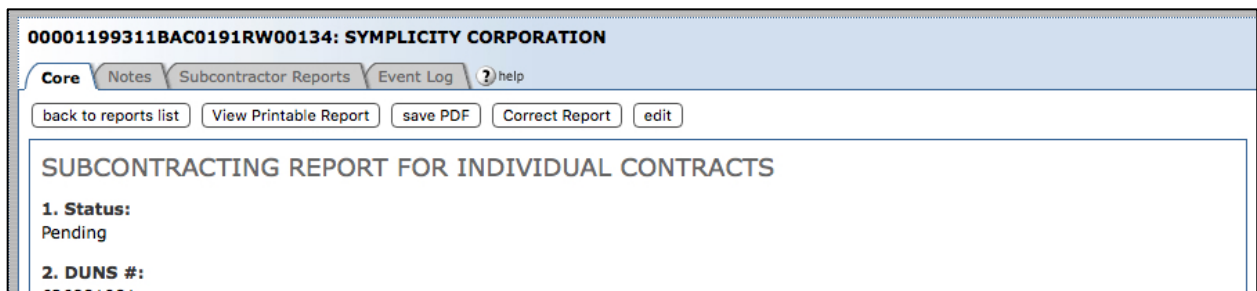
- I. Click on the View Icon beside the desired report.
- II. Select “Release Report” from the “Report Actions” drop down box on the right (see Report Actions screenshot below). **Note:** If you release the report, you will no longer have accept/reject rights for the report.
- III. If you release the report, the action will be tracked in the right hand “Action History” sidebar for both involved agencies to view.



3.7 Correct Report (Awarding Agency Designated on Report)

The Correct Report button allows the user to change the "Agency Awarding Contract" field in a Pending (PEN) ISR.

- I. Click on "Reports" in the left hand navigation menu.
- II. Click on the View Icon beside any report to see more information regarding the filed report.
- III. Click on the Correct Report button to open the Agency Lookup window.
- IV. Enter the first few letters of an agency name to open the picklist, click on desired agency name to load.
- V. Click Select Agency and Continue button to save
- VI. Verify correct Agency in list item 4 in the Subcontracting Report for Individual Contracts Cont'd section.



Section 4 Agencies (Organizations)

NOTE: The functionality provided here is for situations where the agency hierarchies cannot be populated from FPDS. Utilizing these functions is not advisable, Contact the FSD help desk if there is a discrepancy with your agency hierarchy before you take any action. Since the Agency Hierarchy is populated from the FPDS-NG hierarchy, a review must be performed and approval granted before manual modification of an agency.

4.1 Review Organization Hierarchy

- I. Click on “Agencies” on the left hand navigation menu.
- II. Click on “Organizations” on the left hand menu.
- III. You will see a screen similar to the “Agencies / Organizations Screenshot” below.
- IV. Click on the View Icon beside any agency / organization to see more information pertaining to that specific agency / organization.
- V. Notice that any child organization will appear below the parent organization and will also have a red arrow to the left of the name.

Agencies / Organizations Screenshot

Agencies back			
Agencies Advanced Search help			
Search Filters			
Items 1-9 of 9			< Previous Jump 1 Next >
<input type="checkbox"/>		Name	Options
<input type="checkbox"/>		GENERAL SERVICES ADMINISTRATION (4700)	
<input type="checkbox"/>		↳ 2: FEDERAL ACQUISITION SERVICE (4732)	
<input type="checkbox"/>		↳ 2: FEDERAL SUPPLY SERVICE (4730)	
<input type="checkbox"/>		↳ 2: FEDERAL TECHNOLOGY SERVICE (4735)	
<input type="checkbox"/>		↳ 2: OFFICE OF GOVERNMENTWIDE POLICY (4745)	
<input type="checkbox"/>		↳ 2: OFFICE OF MANAGEMENT SERVICES AND HUMAN RESOURCES (4705)	
<input type="checkbox"/>		↳ 2: OFFICE OF SMART CARD INITIATIVES (4747)	
<input type="checkbox"/>		↳ 2: OFFICE OF THE CHIEF INFORMATION OFFICER (4750)	
<input type="checkbox"/>		↳ 2: PUBLIC BUILDINGS SERVICE (4740)	
Items 1-9 of 9			< Previous Jump 1 Next >

4.2 Creating a Child Agency Record

Agency Coordinators have the ability to add additional sub-agency records to their agency hierarchy within the eSRS (this effects FSRS as well).

- I. To create a sub-agency record, click the Add Child Agency button in the Options column.
- II. A New Agency Record will display, the Parent agency field will already be pre-populated based on the Add Child Agency button you selected at a specific level in the hierarchy.
- III. Complete the required (*) fields and click Save or Submit.
- IV. The new sub-agency record (child agency) will display on the Organizations page.

New Agency Record

[New Agency]

Core help

Submit Save Cancel Cancel Edits

Agency Information

Parent Agency: GENERAL SERVICES ADMINISTRATION (470) ▾

Name*:

Shortname:

Code*:

Category: ▾

Agency Address:

Street Address:

City:

State: (USA and Canada only) ▾

Zip+4:

Country: ▾

Status: Active ▾

Submit Save Cancel Cancel Edits

4.3 Editing an Existing Agency Record

- I. To edit an existing agency record, click the Edit icon to the left of the agency record you want to modify.
- II. Modify the information in the Agency record that displays and click Submit or Save.

Agency Record

FEDERAL ACQUISITION SERVICE (4732)

Core | Contacts | Reports | Office Codes | ? help

Submit | Save | Cancel | Cancel Edits

Agency Information

Parent Agency: GENERAL SERVICES ADMINISTRATION (470) ▼

Name*: FEDERAL ACQUISITION SERVICE

Shortname: GSA/FAS

Code*: 4732

Category: ▼

Agency Address:

Street Address:
2200 Crystal Drive

City:
Arlington

State:
(USA and Canada only)
Virginia ▼

Zip+4:
22202

Country:
United States ▼

Status: Active ▼

Submit | Save | Cancel | Cancel Edits

4.4 Managing Office Codes

- I. To manage an agency's office codes, click the View icon to the left of a specific level in the agency hierarchy.
- II. Click on the Office Codes tab, the Contracting Office Codes for the agency or child agency will display.

Contracting Office Codes List

FEDERAL TECHNOLOGY SERVICE (4735) [back](#)
[agencies list](#)

Core Contacts Reports **Office Codes** ? help

Contracting Office Codes

Search Filters

Items 1-20 of 48 < Previous | Jump 1 | Next >

	Office ▼	Active
		Yes
	0010B	Yes
	285X00	Yes
	4730B2	Yes
	4730AA	Yes
	AA000	Yes
	AC000	No
	AE000	Yes
	AF000	Yes
	AH000	No

- III. Click the Edit button next to the office code that you want to modify.
- IV. Modify the office code details as needed and then click Submit.

Contracting Office Code Record

FEDERAL TECHNOLOGY SERVICE (4735)

Core Contacts Reports **Office Codes** ? help

Contracting Office Codes

submit cancel

Office Information

Office Code*: 0010B

Name: TECHNOLOGY ACQUISITION CENTER

Active: If "no", this office will not be selectable during registration
 Yes No

submit cancel

Section 5 Agency Contacts

5.1 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.

View of Agency Contacts List

Contacts back						
Agency Contacts ? help						
Search Filters						
Agency	<input type="text"/>	User Level	<input type="text"/>			
Permission Level	<input type="text"/>	Keywords	<input type="text"/>			
<input type="button" value="Apply Search"/>						
Group List By: By User By Accounts						
Batch Options	Items 1-20 of 38		Jump <input type="text" value="1"/> Next >			
<input type="checkbox"/>	Last Name ▼	First Name ▼	Agency	Title ▲	Email ▼	Phone
<input type="checkbox"/>	S...	K...	SMALL BUSINESS ADMINISTRATION (7300)	SPECIAL ASSISTANT TO AREA 3 DIRECTOR	ke...@a.gov	
<input type="checkbox"/>	ke...	h...	DEPT OF DEFENSE (9700) GENERAL SERVICES ADMINISTRATION (4700)	QA	ha...@a.gov	

5.2 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.

Group List By: By User | By Accounts

Jump | [Next >](#)

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

5.3 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]

Batch Option: Mail>New Message

Contacts							
Agency Contacts back							
Search Filters							
Agency		User Level		Keywords			
Permission Level		Designated Government User (DGU)					
<input type="button" value="Apply Search"/> <input type="button" value="Clear"/>							
Group List By: <u>By User</u> By Accounts							
Batch Options Items 1-10 of 10							
			Title	Email	Phone	Last Login	Acct Disabled
<input type="checkbox"/>	Benoit	Robert	AMERICAN BATTLE MONUMENTS COMMISSION (7400)	rnbenoit@hotmail.com		Dec 28, 2007 8:49 am	No
<input type="checkbox"/>	Borkenhagen	Aaron	DEPT OF DEFENSE (9700)	aaron.borkenhagen@gsa.gov		Jan 22, 2010 10:30 am	No
<input type="checkbox"/>	Fiffick	Kathryn	GENERAL SERVICES ADMINISTRATION (4700)	kathryn.fiffick@gsa.gov		Nov 16, 2010 9:08 am	No
<input type="checkbox"/>	Karlick	Melissa	A Test Agency (A123)	melissa.karlick@us.ibm.com		Jan 12, 2012	No

- 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.

Batch Option: Mail>Mail Wizard Step 1

Contacts

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

Message Identifier: Please enter an identifier for this message

Subject*: Enter the subject of the email message.

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

Cc: Address(es) who should be carbon copied

Bcc: Address(es) who should be blind copied

HTML Format: Do you wish to format this message using HTML?
 Yes No

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

Attachment(s):

Mail Available Fields

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

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

Batch Option: Mail>Mail Wizard Step 2

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.		
testing@symplcity.com ⌵		
<input type="button" value="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.		
<input type="button" value="Cancel"/>	<input type="button" value="Prev"/> <input type="button" value="Send Messages"/>	

Clicking Send Messages will deliver the email to the intended recipients.

Contacts	
Agency Contacts	New Agency Contact Registrations
Mail Wizard	? help
Queuing messages. Please wait...	
Done! 1 messages queued for delivery. Messages will be delivered shortly.	

5.4 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.



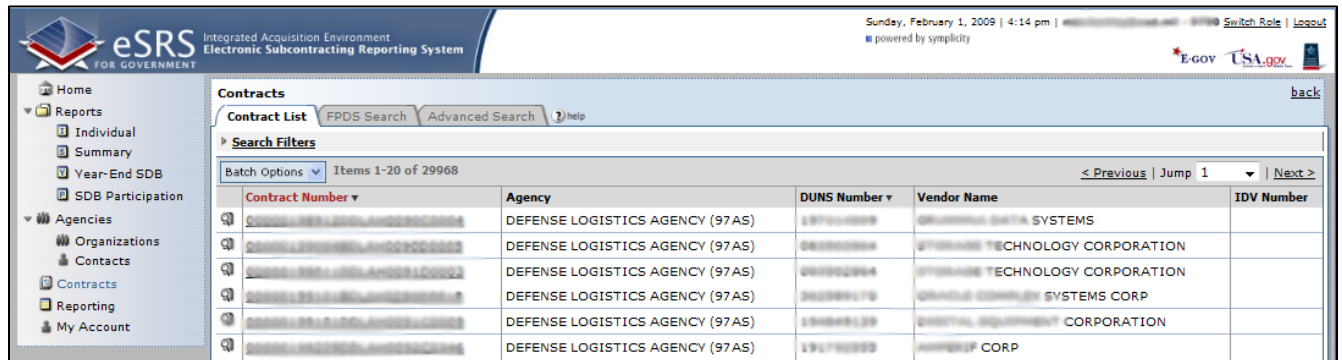
- II. After selecting the desired contacts, you can save the list as an excel file by clicking Batch Options -> Save As Excel -> Selected Records. A pop-up will appear with the option to open the file or save the file.
- III. You can also save an entire page as an excel file without having to select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

Section 6 Contracts

6.1 Contracts List

- I. Click on “Contracts” on the left hand navigation menu.
- II. You should see a screen similar to the one below.
- III. Click on the View icon or the Contract Number to view the details of the contract.
- IV. You may also use the search criteria (Advanced Search Tab) or the filtering technology to filter the list to a smaller number of results. **Note: You will not be able to search for PIID/Contract numbers that have been changed in FPDS-NG. You are only able to search for current PIID/Contract numbers.**

Contract List Screenshot



The screenshot shows the eSRS web interface. The top navigation bar includes the eSRS logo and the text 'Integrated Acquisition Environment Electronic Subcontracting Reporting System'. The date and time are 'Sunday, February 1, 2009 | 4:14 pm'. The user is logged in as 'eSRSAdmin@gsa.gov'. The left navigation menu has 'Contracts' selected. The main content area is titled 'Contracts' and has tabs for 'Contract List', 'FPDS Search', and 'Advanced Search'. Below the tabs is a 'Search Filters' section with a 'Batch Options' dropdown and 'Items 1-20 of 29968'. A table displays the following data:

Contract Number	Agency	DUNS Number	Vendor Name	IDV Number
00000000000000000000000000000000	DEFENSE LOGISTICS AGENCY (97AS)	18700000	ORION DATA SYSTEMS	
00000000000000000000000000000000	DEFENSE LOGISTICS AGENCY (97AS)	06000004	STORAGE TECHNOLOGY CORPORATION	
00000000000000000000000000000000	DEFENSE LOGISTICS AGENCY (97AS)	06000294	STORAGE TECHNOLOGY CORPORATION	
00000000000000000000000000000000	DEFENSE LOGISTICS AGENCY (97AS)	06000170	ORION DATA SYSTEMS CORP	
00000000000000000000000000000000	DEFENSE LOGISTICS AGENCY (97AS)	10000010	ORION DATA SYSTEMS CORPORATION	
00000000000000000000000000000000	DEFENSE LOGISTICS AGENCY (97AS)	19070000	AMREP CORP	

6.2 Important Threshold Update

Effective October 1, 2015, the Department of Defense (DOD), General Services Administration (GSA), and National Aeronautics Administration (NASA) are issuing [FAR Case 2014-022](#) as a final rule amending the Federal Acquisition Regulation (FAR) to implement the inflation adjustment of acquisition-related dollar thresholds.

Section 7 My Account

7.1 General Information

- I. The “My Account” navigation enables users to change their personal information (e.g., Name, Title, Phone, Fax, and E-mail) and passwords.
- II. Users click on “My Account” in the left navigation menu to open the navigation.
- III. Users can edit their personal contact data captured in the presented fields.
- IV. Users click “Save” to save changes.

My Account General Information tab

My Account

General Information
Password
? help

My Account Information

Title:

Fullname*:

First Name:

Middle Name:

Last Name:

Suffix:

Email*:

Phone:

Cell Phone:

Fax:

7.2 Request New Role/Office for an Account

- I. From within the system, users can request the addition of a new role/office affiliation for their account.
- II. Users click the “request new role/office” button on the right side bar.
- III. Users then complete the required information on the request form that is presented and click “send request” to submit the request for a new role.
- IV. Users will receive an email when their registration has been approved by the agency administrator responsible for review of that request.

Request Role / Office Screenshot

User Roles	
AGRICULTURE, DEPARTMENT OF (1200)	POC
DEPT OF DEFENSE (9700)	Super-User (DOD)
GENERAL SERVICES ADMINISTRATION (4700)	Super-User
* Agency in bold is current selected role	
<input type="button" value="request new role/Office"/>	

Request New Role Form

My Account

General Information Password **Request New Role** ? help

Note: Please fill out all the required information below and click [send request] to submit your registration for a new role. You will receive an email when your registration has been approved.

send request cancel

New Role Information * indicates a required field

Agency*:

User Level*: agency contracting office

Role*: Agency Coordinator (AC)
 Contracting Official
 Designated Government User (DGU)
 POC

Supervisor Name:

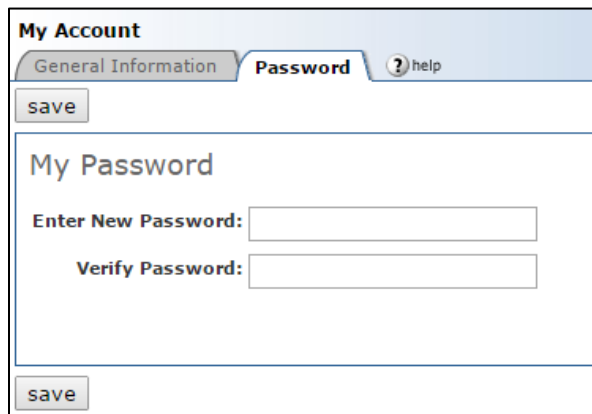
Supervisor Email:

send request cancel

7.3 Change Password

- I. Users click on the “My Account” navigation in the main navigation to change their password.
- II. The user then clicks on the “password” tab.
- V. The new password is entered twice on the form.
- VI. The user then clicks on “Save” to enter the new password in the system.

Password Change Screen



The screenshot shows a web interface for changing a password. At the top, there is a header titled "My Account" with two tabs: "General Information" and "Password". The "Password" tab is selected. To the right of the tabs is a "help" link with a question mark icon. Below the tabs is a "save" button. The main content area is titled "My Password" and contains two input fields: "Enter New Password:" and "Verify Password:". At the bottom of the form is another "save" button.

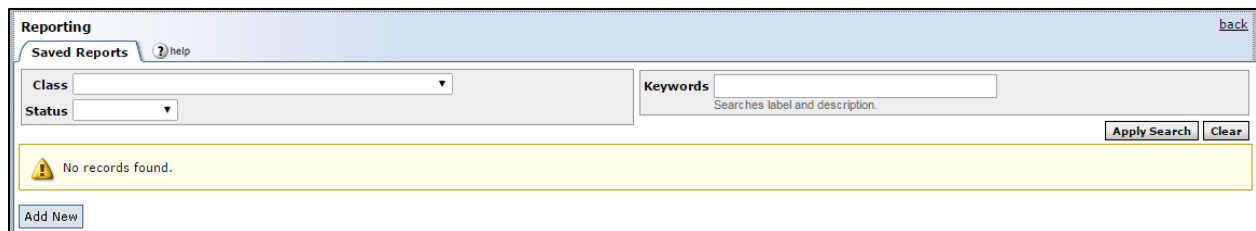
Section 8 Reporting

Additional information on Reporting and the types of reports available in the system can be found in the Generating Reports user guide. At the top of the Pre-Defined reports an explanation is provided to explain the basis behind the report.

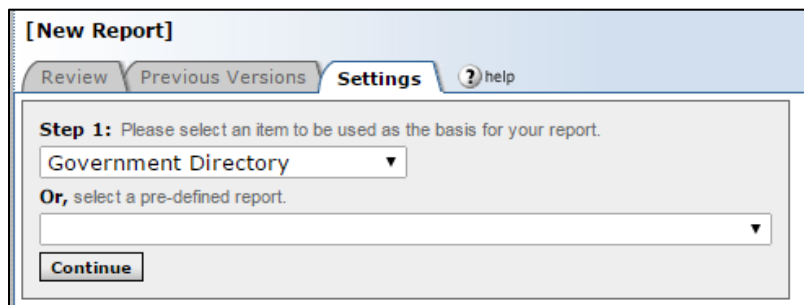
8.1 Build New Reports

- 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.

Reporting Section



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.**

The Basis for the reports is broken into two different types of reports, Ad Hoc and Pre-defined.

Ad-Hoc Reports: Can be run based on the user selecting specific filters which will return a specific set of data.

- Government Directory**
- Contractor Directory**
- Individual Subcontract Report**
- Summary Subcontract Report**
- Agency**

Pre-Defined Reports: Can be run at any time and require the user to set specific filters to determine the basis for the report results.

- Subcontracting Contractor Award Dollars**
- 5 Year Contractor Trend Report**
- Awards By Contractors, By Service and Type of Business (294)**
- Awards By Contractors, By Service and Type of Business (295)**
- Awards By Contractors, By State (294)**
- Awards By Contractors, By State (295)**
- ISR First Tier Report**
- Analysis of Subcontracting Plan Goal Attainment**
- Subcontracting Achievements by Federal Agency**
- ISR Status Report**
- SSR Status Report**
- ISR All Tiers Report**
- Time-Phased Individual Subcontract Report**
- Contracting Officers that Review ISRs**
- Contracting Officers that Do Not Review ISRs**
- Federal Procurement Subcontract Report (SBA Version)**
- Contractors Without Current ISR**

Build a New Report

[New Report]
report

Review
Previous Versions
Settings
help

! Reports will pull from **accepted** Summary Subcontracting Reports from your agency and below. You may filter to specific agencies, reporting periods, report submitter, SBA Regions or Contracting Areas, or by specific states by clicking on the "filter" link underneath the field you desire to filter. If you would like to filter by a specific agency/agencies, find the "Agency To Which You are Submitting Report" filter and choose from the agencies in the select list. If you only want reports from the exact agencies you selected, check the "Limit filter to select values" checkbox; otherwise, reports will pull from the agencies selected and their respective sub-agencies.

Save as: [Subcontracting Contractor Award Dollars] Kristin Schmidt / 2015-01-24 : **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: **Summary Subcontract Report** Count

- DUNS # filter
- Agency To Which You are Submitting Report filter
- Reporting Period Month filter
- Reporting Period Year filter
- 2015
- Report Submitted As filter
- Vendor Name
- SBC Whole Dollars
- LBC Whole Dollars
- TOTAL Dollars
- SDB Dollars
- WOSB Dollars
- HBCU and MI Dollars
- HUBZone Dollars
- VOSB Dollars
- SD/VOSB Dollars
- ANC Dollars
- ANC (Not Small Business) Dollars
- SBA Region filter
- SBA Contracting Area filter

Summary Subcontract Report: Vendor Physical Address filter

- State filter
- Country filter

8.2 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

Review Previous Versions Settings ? help																					
regen report open in new window save as excel change settings return to report list																					
Company	SB	SB %	LB	LB %	Total	SDB	SDB %	WOSB	WOSB %	HBCU _MI	HBCU _MI %	HUBZ	HUBZ %	VOSB	VOSB %	SD _VOSB	SD _VOSB %	ANC	ANC %	ANCN	ANCN %
	26,258,964	36.6	45,493,758	63.4	71,752,722	140,861	0.2	1,417,867	2.0	0	0.0	128,101	0.2	2,168,460	3.0	134,748	0.2	97,707	0.1	0	0.0
	0		0		0	0		0		0		0		0		0		0		0	
	4,850,537	62.0	2,851,920	38.0	7,502,457	110,264	1.5	978,986	13.0	0	0.0	0	0.0	2,147,715	28.6	1,885,872	22.5	0	0.0	0	0.0
	141,900	47.3	158,100	52.7	300,000	0	0.0	6,900	2.3	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
	12,282	5.7	202,020	94.3	214,302	564	0.3	456	0.2	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0

8.3 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 their respective icons.

View Existing Reports

Reporting back					
Saved Reports help					
Class <input type="text"/>		Keywords <input type="text"/>			
Status <input type="text"/>		Searches label and description.			
					Apply Search Clear
Items 1-13 of 13 < Previous Jump 1 Next >					
Options	Class	Label	Description	Last Modified	Last Run
	Subcontracting Achievements by Federal Agency	[Subcontracting Achievements by Federal Agency]" / 2010-10-06 15:19:44		Sep 15, 2011 2:02 pm	Sep 15, 2011, 2:02 pm
	Federal Procurement Subcontract Report (SBA Version)	[Federal Procurement Subcontract Report (SBA Version)" / 2011-04-06 12:08:08		Apr 06, 2011 12:08 pm	Apr 6, 2011, 12:08 pm
	Awards By Contractors, By Service and Type of Business (294)	[Awards By Contractors, By Service and Type of Business (294)]" / 2011-02-23 14:41:54		Mar 04, 2011 3:44 pm	Mar 4, 2011, 3:44 pm
	SSR Status Report	[SSR Status Report]" / 2010-10-18 13:52:52		Nov 15, 2010 4:30 pm	Nov 15, 2010, 4:30 pm
	Summary Subcontract Report	[f295] / 2010-10-25 11:46:38		Oct 25, 2010 3:57 pm	Oct 25, 2010, 3:57 pm
	Summary Subcontract Report	[f295] / 2010-10-18 13:49:07		Oct 20, 2010 2:10 pm	Oct 20, 2010, 2:10 pm