

## eSRS Reporting Training for Government Users

- In order to complete this training, you should be familiar with eSRS, its functions, and its navigation.
- Things you'll need to know to get started:
  - The website is [www.esrs.gov](http://www.esrs.gov)
  - You must have your email and password ready from registration.
  - Login using the government login.

Address <https://esrs.symlicity.com/?>

**eSRS** Integrated Acquisition Environment  
Electronic Subcontracting Reporting System  
FOR GOVERNMENT

Welcome Government Users

eSRS Sign-In Register Forgot my password

Email Address:

Password:

Keep me logged in on this computer

[Not a government user? Click here.](#)

[Registration instructions for Government Users](#)

**Guides for eSRS Government Users:**  
[eSRS Agency Coordinator Guide](#)  
[eSRS CO Guide](#)  
[eSRS POC Guide](#)  
[eSRS DGU Guide](#)  
[eSRS Training Powerpoint](#)

Help Desk Privacy Policy Version 3.0.1

### Things You Should Know

- Remember that any government role within eSRS has the ability to run reports on the data.
- When you run a report, it will show up on your reports list. You can regenerate the report when you need to or delete the report from your list when you are done.
- Your eSRS reporting access level is based on the organization you registered under. For instance, if you are logged in under the Department of Defense you will have access to all DoD reports. If you registered under the Department for the Army, you will only see Army reports.
- Unless you are running a Pre-Defined ISR or SSR status report, you will only be able to view data from reports that have been **“Accepted”** in the system. Reports that are in any other phase will not be visible.
- These phases include **“Pending,” “Rejected,” “Revised,”** and **“Reopened.”**

## Navigating eSRS

- When you first log in to the system, you will be brought to the home page. To navigate to the reporting module, select “**reporting**” on the left-hand side.

Address <https://esrs.symlicity.com/index?&>

Wednesday, October 29, 2008 | 9:00  
powered by symlicity

eSRS  
Home ? help

Pending Actions

- 66 New Agency Contact Registrations
- 408 Individual Report(s) Pending
- 64 Summary Report(s) Pending
- 11 Year-End Report(s) Pending
- 8 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.

eSRS Statistics

- Agencies
- Agency Contacts
- Accepted ISRs
- Accepted SSRs
- Accepted Year-Ends
- Accepted SDBs

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- This will bring you to the reporting page in the application.

Wednesday, October 29, 2008 | 9:54 am | geoffrey.ames.ct@bta.mil - 9700 Switch Role | Log Out  
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eSRS  
Reporting ? help

Class [v] Keywords [ ]  
Status [v] Searches label and description. [Apply Search] [Clear]

Items 1-2 of 2

Options	Class	Label	Description	Last Modified	Last Run
[New] [Edit] [Delete]	ISR Status Report	[ISR Status Report*] Geoffrey Ames / 2008-10-21 10:39:29		Oct 27, 2008 11:15 am	Oct 27, 2008, 11:15 am
[New] [Edit] [Delete]	SSR Status Report	[SSR Status Report*] Geoffrey Ames / 2008-10-21 10:37:50		Oct 27, 2008 11:14 am	Oct 27, 2008, 11:14 am

Add New Items 1-2 of 2

- Things you will see on this page are:
  - A list of previously run reports archived by: class, label, description, date last modified, and date last run.
  - Three ways to search for a particular report in the list. You may search by class, status, or keyword which searches the label and description.
- In order to start a new report, you simply click the “**Add New**” button below the reports list on the left side.

- When you arrive at this screen to run a new report you will be greeted with two drop down boxes. At this point you will have to decide whether you would like to run a Pre-Defined report or an Ad-Hoc report.



- **Pre-Defined Reports**
  - These reports have been developed by the system administrator and are available for all eSRS government users.
  - Pre-Defined reports are based on pre-selected criteria.
  - When generating a Pre-Defined report, the individual can provide additional information within the filters.
- **Ad-Hoc Reports**
  - Reports can be generated where no criteria have been pre-selected.
  - Those generating the report can narrow or broaden the scope AND utilize filters to further specify data requirements.
  - Ad-Hoc reports will be discussed later in this training.

## PRE-DEFINED REPORTS

### Pre-Defined Report Background Information

- Each Pre-Defined report will have filters with check boxes.
- If you would like to view reports from your EXACT agency, check the “**Limit filter to select values**” checkbox.
- To limit the results to a specific reporting period, use the “**Reporting Period Month:**” filters.
- Otherwise, you may customize your report to pull data as broad or as narrow in scope as you would like (remember that you can always edit your report at a later time.)
- Unlike the Ad-Hoc report, running a Pre-Defined report does not require the pre-selection of fields. These fields are already checked off and cannot be unselected.
- Additional information will still be required at the filter level by the person generating the report.
- Make sure to have handy such data as reporting year, agency, contract number, and DUNS number.

### Types of Pre-Defined Reports

- **ISR First Tier Report:** Shows the prime contractor’s subcontracting awards. This is the same as the paper form SF-294, submitted by the prime contractor.
- **Subcontracting Contractor Award Dollars:** For Summary Subcontract Reports (SSR) submitted to a particular agency (Department of Defense) or below (military service/other defense agency (i.e. Air Force, Army, Defense Logistics Agency)). Use this to view a contractor’s total subcontracting dollars in each socio-economic category. NOTE: The contractor submitting an SSR identifies the military service or other defense agency which administers the majority of its subcontracting plans.
- **Time-Phased ISR:** Show a contractor’s actual change (+ or -) from one or multiple reporting periods. Contracting Officers will want to use this to evaluate or compare their contractor’s performance from different reporting periods.
- **5 Year Contractor Trend Report:** Based on SSR data. Displays the subcontracting trend for a specific agency (DoD or below (military service or other defense agency) over an extended time period in each socio-economic category. This report requires a DUNS number.
- **Analysis of Subcontracting Plan Goal Attainment:** Displays the achievements vs. the goals (%-wise) on the Individual Subcontracting Report for a specified contractor. This report also requires that a DUNS number be input.
- **Subcontracting achievements by Federal Agency:** Based on SSR data. Allows you to see the total subcontracting dollars for every Federal agency (parent and sub-agency) in every socio-economic category.
- **ISR All Tiers Report:** Lays out the subcontracting achievements at every tier (from the prime contractor down to each level of subcontractor). Use this to

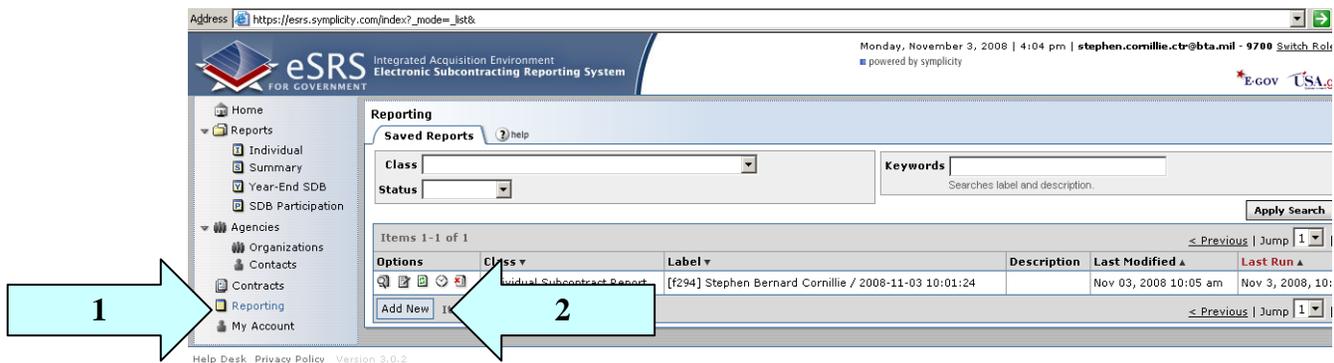
review subcontracting activity taking place on any given contract. A prime contract number is required to run this report.

- **ISR Status Report:** This report will show you all of the ISRs at a specific agency level and their corresponding status, i.e. pending, accepted, rejected.
- **SSR Status Report:** This report will show you all of the SSRs at a specific agency level and their corresponding status, i.e. pending, accepted, rejected.

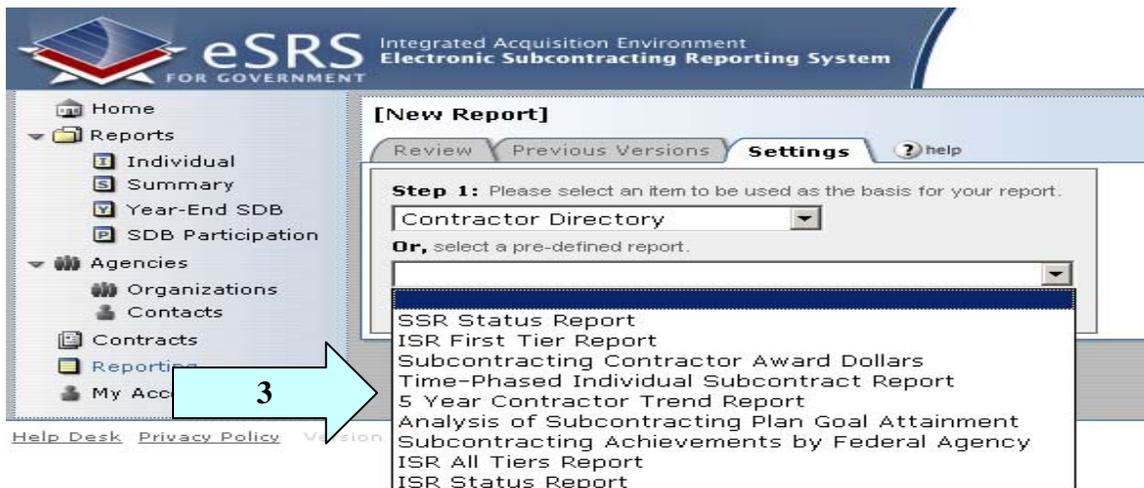
### Generating a Pre-Defined Report

1.) Create a New Report by clicking on **“Reporting”** on the left navigation menu.

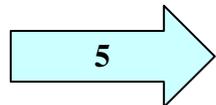
2.) At the next screen, click on the light blue **“Add New”** box.



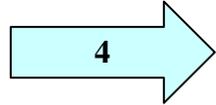
3.) From the drop down menu select a **“Pre-Defined Report”** and click continue.



- 4.) The required report criteria will be pre-selected within the “Pre-Defined Report” however; other information will need to be provided by the user (i.e., reporting year, agency or sub-agency).
- 5.) Helpful information and guidance about selecting the additional report parameters will be displayed at the top of the screen.
- 6.) As previously mentioned, you may not unselect the checked boxes but you do have the ability to adjust the filters accordingly. After you have finished surveying the parameters, click “Submit” to generate the report. If you click on “Save & Continue” you will be taken back to the “Predefined Report” menu screen.



 Reports will pull from **accepted** Summary Subcontracting Reports from your agency and below. You may filter to specific agencies, reporting periods, and report submitter 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.

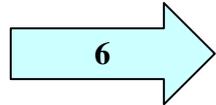


**Save as:** [Subcontracting Achievements by Federal Agency] Stephen Berr **Max. on-screen results:** 500 (enter zero to display all rows)  
**Description:**

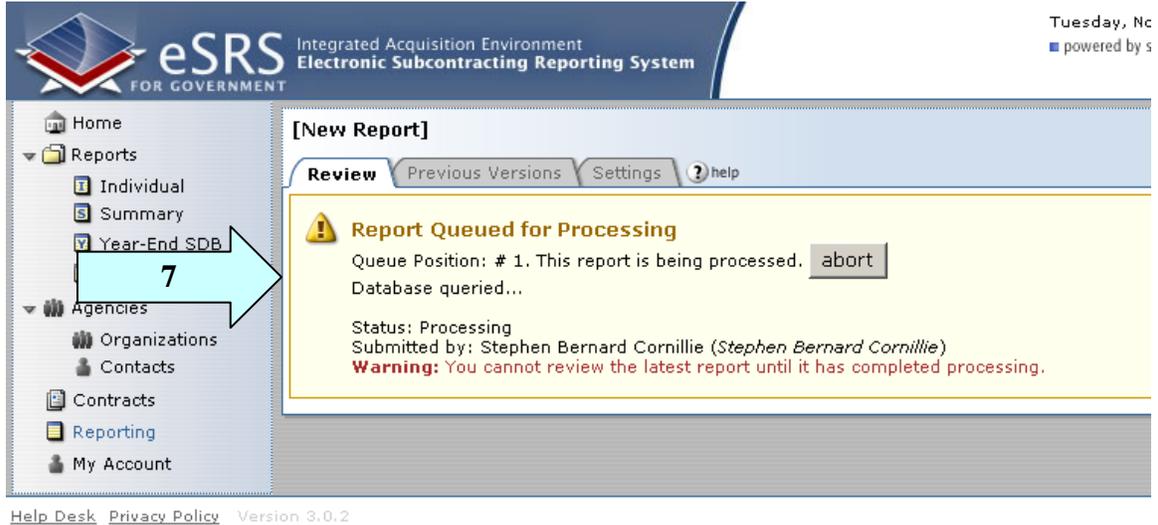
**Step 2:** Please select the fields and filters you wish to have included in your report.

**Base Class: Summary Subcontract Report**  Count

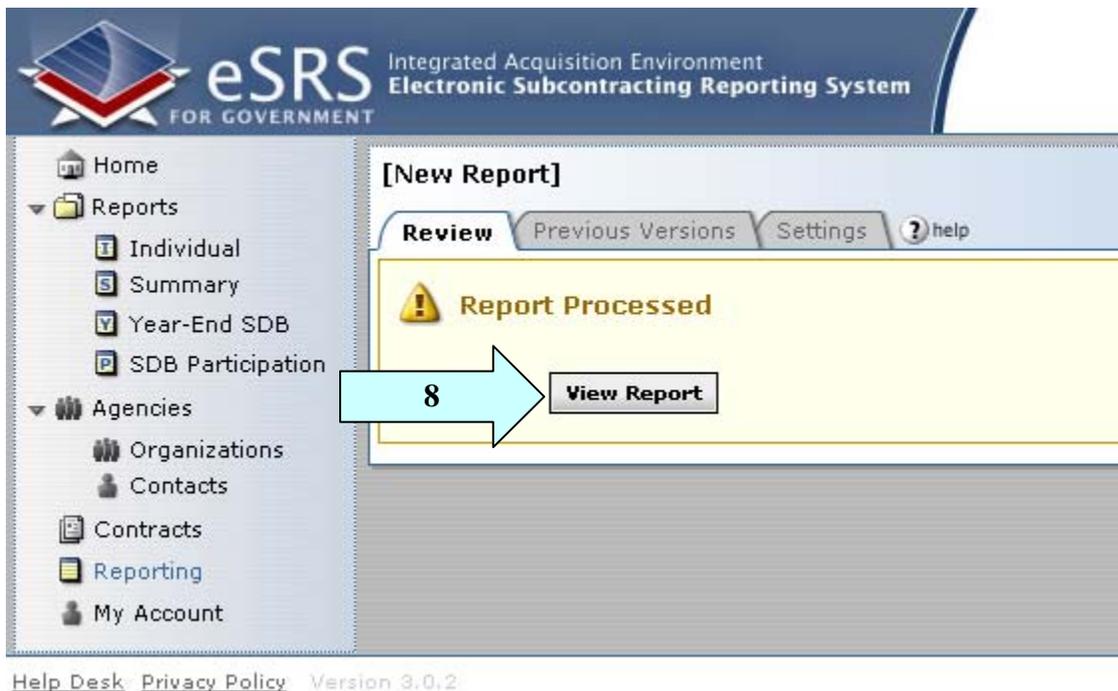
- Agency To Which You are Submitting Report 
- Reporting Period Month 
- Reporting Period Year   
2008
- Report Submitted As 
- Type of Plan 
- SBC Whole Dollars
- LBC Whole Dollars
- TOTAL Dollars
- SDB Dollars
- WOSB Dollars
- HBCU and MI Dollars
- HUBZone Dollars
- VOSB Dollars
- SDVOSB Dollars
- ANC Dollars
- ANC (Not Small Business) Dollars



7.) After clicking the submit button, your report will then be generated:



8.) After the report is finished generating, click the “View Report” button to display the report on the next page.



9.) There are several options available once the report is generated:

- a.) You may regenerate the report by clicking the **“Regen Report”** tab. This function is used to replicate the report in order to show updated data.
- b.) If you wish to show the report in a separate browser window you may do so by clicking **“Open in New Window.”**
- c.) You have the option of transferring the report into an Excel spreadsheet by clicking **“Save as Excel.”** **Note:** Navy cannot do this within their NMCI network.
- d.) Clicking **“Change Settings”** allows you to go back and edit the parameters of the report.
- e.) To return to your list of previously run reports, click the **“Return to Report List”** button.

Integrated Acquisition Environment  
Electronic Subcontracting Reporting System

Tuesday, November 4, 2008 | 10:10 am  
powered by simplicity

[Subcontracting Achievements by Federal Agency] Stephen Bernard Cornil 2008-11-04 10:02:33

Review Previous Version Settings

**Regen Report** Open In New Window Save As Excel Change Settings Return To Report List

Reporting Agency	SB	SB %	LB	LB %	Total	SDB	SDB %	WOSB	WOSB %	HBCU _MI
<b>FY 2008</b>										
ACC (ACC)	1,517,991	100.0	0	0.0	1,517,991	1,192,886	78.6	1,000,967	65.9	267,757
AMC (AMC)	1,417,016	100.0	0	0.0	1,417,016	1,192,886	84.2	1,000,967	70.6	267,757
ARNOLD ENGINEERING DEVELOPMENT CENTER (AEDC)	28,980,751	61.5	18,148,108	38.5	47,128,859	5,772,354	12.2	4,740,531	10.1	0
COMPREHENSIVE SUBCONTRACT PROGRAM DIVISION (CSP)	9,790,699,898	30.7	22,070,235,889	69.3	31,860,935,787	1,445,218,828	4.5	1,716,330,846	5.4	1,916,322
DCMA Chicago (CW 10)	179,293,130	43.0	237,657,751	57.0	416,950,881	23,139,422	5.5	34,975,767	8.4	0
DCMA Contracting East (CE)	3,062,443	34.8	5,730,624	65.2	8,793,068	80,866	0.9	510,506	5.8	406

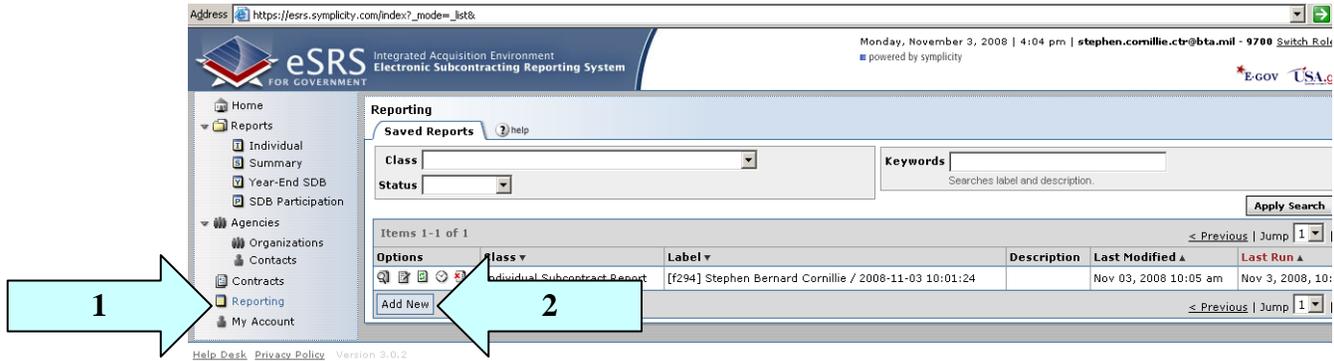
## **AD-HOC REPORTS**

### **Ad-Hoc Report Background Information**

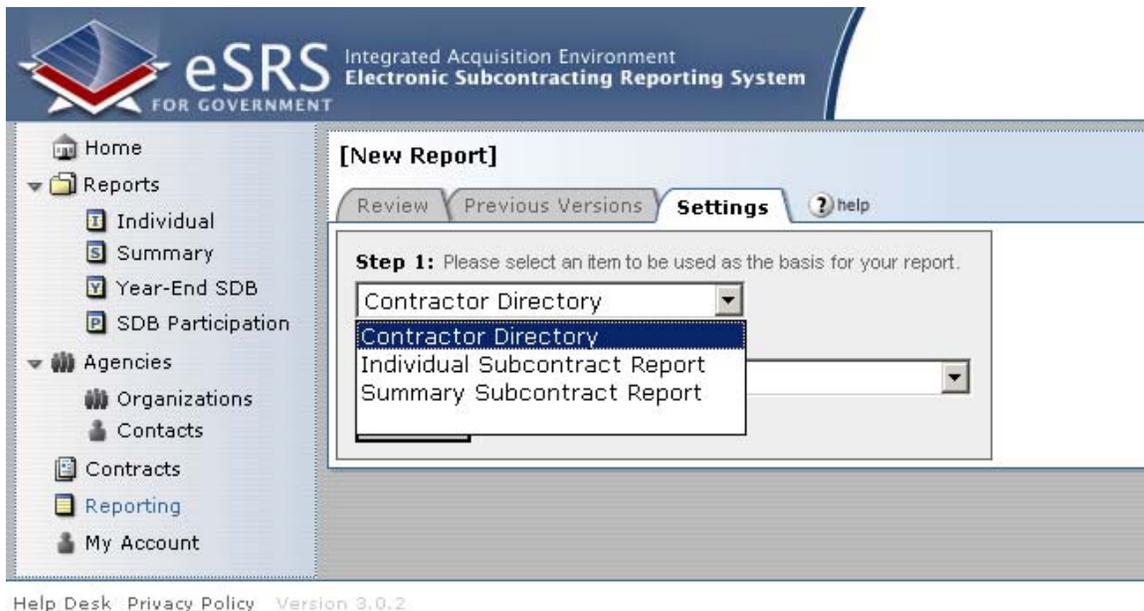
- Ad-Hoc reports differ from Pre-Defined reports in that the report criteria have NOT been pre-selected. You are free to manipulate and modify the filters yourself.
- Currently, eSRS does not enable users to share Ad-Hoc reports you have created with another system user.
- However, if you save a report as an Excel file, you are able to email it as an attachment to another user. This way they will be able to see the parameters used in the report (they will appear as column headings).
- Another viable option would be to take screenshots of either your report parameters or the actual report itself in order to show users how you formulated a specific report.

## Generating an Ad-Hoc Report

- 1.) Create a New Report by clicking on “**Reporting**” on the left navigation menu.
- 2.) At the next screen, click on the light blue “**Add New**” box.



- 3.) Select an item from the top (under “**Step 1**”) drop down box as the basis for your report and click continue.
  - **Contractor Directory:** This option gives you the ability to build a report based on contractor information. (e.g. Contractor Name, DUNS #, Contractor Address)
  - **Individual Subcontract Report:** This option gives you the ability to build a report based on information contained in ISRs for your registered level.
  - **Summary Subcontract Report:** This option gives you the ability to build a report based on information contained in SSRs for your registered level.



- 4.) Before building the report, check mark the **“Save as Box”** and input a name and description for the report.
- 5.) If you are updating a pre-existing report, save the report under a different name and insert a description if you would like. A description is extremely helpful when you have many of the same type of report and would like to distinguish between them.
- 6.) Within the wide array of filters, you will have the ability to make the scope of your report making it as broad or as narrow as you would like.

Wednesday, November 5, 2008 | 2:48 pm | [stephen.comillie.ctr@bta.mil](mailto:stephen.comillie.ctr@bta.mil) - 9700 Switch.Bc  
powered by simplicity

**[New Report]**

Reports will pull from Individual Reports from your agency and below. If you would like to filter by a specific agency/agencies, scroll down to the Contract Related class 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. To limit the results to a specific reporting period, use the "Reporting Period Month:" filters.

**Save as:** [f294] Stephen Bernard Comillie / 2008-11-05 14:48:25 **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:** Individual Subcontract Report

Status  
 Summarize  
 filter

Contract  
 filter

Target Agency  
 filter

Report Submitted As  
 filter

Vendor Name  
 filter

Vendor Physical Address  
 filter

Date Submitted  
 filter

Agency Awarding Contract  
 filter

- 7.) Once fields and filters have been assigned, generate the report by clicking **“Submit”** at the bottom of the page. **NOTE:** Save and continue will save the report criteria and return you to the **“Saved Report List”**, but will not run the report.

Contracting Agency Code

Contracting Office Code

Vendor Name

Parent DUNS Number

DUNS Number

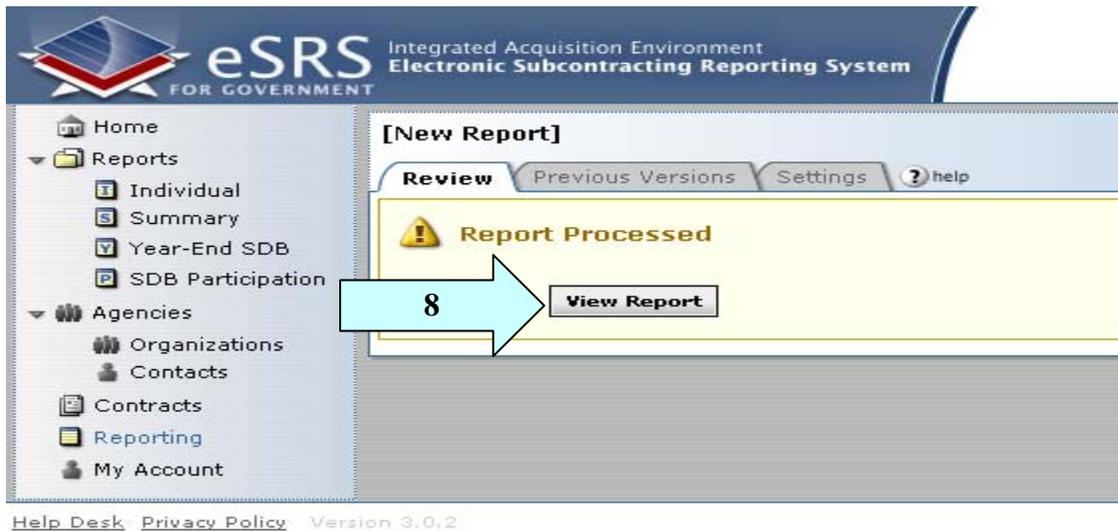
DBA Name

IDV Contract?  
 Summarize  
 filter

Reference Number

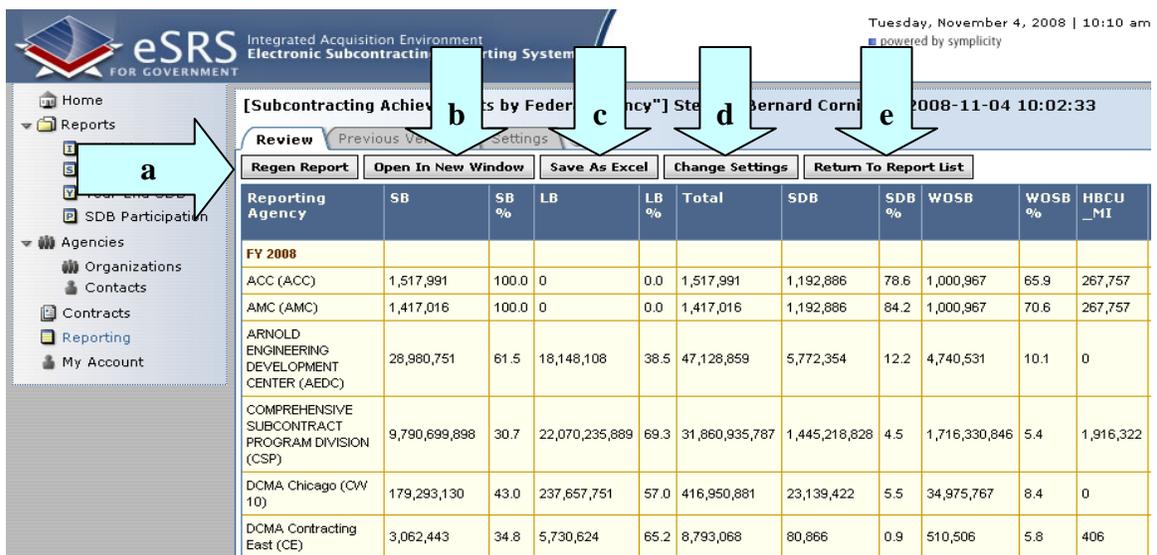
**Submit** **Save & Continue** **Cancel**

- 8.) After the report is finished generating, click the “**View Report**” button to display the report on the next page.



- 9.) There are several options available once the report is generated:

- a.) You may regenerate the report by clicking the “**Regen Report**” tab. This function is used to replicate the report in order to show updated data.
- b.) If you wish to show the report in a separate browser window, you may do so by clicking “**Open in New Window.**”
- c.) You have the option of transferring the report into an Excel spreadsheet by clicking “**Save as Excel.**” **Note:** Navy users do not have this functionality.
- d.) Clicking “**Change Settings**” allows you to go back and edit the parameters of the report.
- e.) To return to your list of previously run reports, click the “**Return to Report List**” button.



## Sample Ad-Hoc Report

- Now that you understand the principles of generating an Ad-Hoc report, this section will illustrate a specific set of parameters and how they were used to develop a report.
- For instance, let's say I wanted to see a list of all the pending reports for the Army and the different sub commands in the Army they are connected to.

1.) As you can see I have selected the following:

a.) **Status:** "Pending"

b.) **Target Agency:** "Dept of The Army." Notice that I did **NOT** check the "Limit Filter to Selected Values" box because I wish to see all of the subcommands underneath Army.

c.) **Date Submitted:** By clicking date submitted it will display the reports by date as well which is a convenient way to view reports. Notice that I did not insert any specific date parameters due to the fact that I want to view all of the Army's pending reports in the system, not just reports from a specific time period.

The screenshot shows a web-based report configuration interface. At the top, it says "Base Class: Individual Subcontract Report". Below this, there are several sections for filtering:

- Status:** A checked checkbox is next to "Status". A dropdown menu is open, showing "Pending" (highlighted), "Revised", "Accepted", "Rejected", and "Reopened". A light blue arrow labeled "a" points to this section.
- Contract:** An unchecked checkbox is next to "Contract".
- Target Agency:** A checked checkbox is next to "Target Agency". Below it is a "filter" dropdown set to "[select]" with a "clear" button. A list box below shows "DEPT OF THE ARMY (2100)" with a checked checkbox. A light blue arrow labeled "b" points to this section.
- Limit Filter to Selected Values:** An unchecked checkbox.
- Report Submitted As:** An unchecked checkbox.
- Vendor Name:** An unchecked checkbox.
- Vendor Physical Address:** An unchecked checkbox.
- Date Submitted:** A checked checkbox is next to "Date Submitted". Below it is a "filter" dropdown. At the bottom, there are input fields for dates and "Select" and "Clear" buttons. A light blue arrow labeled "c" points to this section.

- 2.) Underneath the last blue heading which is “**Individual Subcontract Report: Contract**” I have selected the following items to for visual enhancement and specificity purposes:
- a.) **Contract Number:** notice I did not filter it by a specific contract number due to the fact that I want to view all of them.
  - b.) **Agency Code**
  - c.) **Contracting Agency Code**
  - d.) **Contracting Office Code**

Individual Subcontract Report: Contract

- Contract Number  
filter
- IDV Number
- IDV Number (Relation)
- Agency Code
- IDV Agency Code
- Date Signed  
filter
- Date Effective  
filter
- Current Completion Date  
filter
- Ultimate Completion Date
- Current Contract Value  
filter
- Ultimate Contract Value  
filter
- Dollars Obligated  
filter
- Contracting Agency Code
- Contracting Office Code
- Vendor Name
- Parent DUNS Number
- DUNS Number
- DBA Name
- IDV Contract?  
 Summarize  
filter
- Reference Number

Submit Save & Continue Cancel

3.) Below is what this report will look like based on the parameters given.

[f294] Stephen Bernard Cornillie / 2008-11-03 10:01:24 [back reporting list](#)

Review Previous Versions Settings ? help

Regen Report Open in New Window Save As Excel Change Settings Return To Report List

Individual Subcontract Report: Status	Individual Subcontract Report: Target Agency	Individual Subcontract Report: Date Submitted	Contract: Contract Number	Contract: Agency Code	Contract: Contracting Agency Code	Contract: Contracting Office Code
Pending	AFSC (AFSC)	11/01/1996	DAAA0996C0018	9700	2100	W52P1J
Pending	AFSC (AFSC)	07/25/1997	DAAA0997C0098	9700	2100	W52P1J
Pending	AFSC (AFSC)	12/08/1998	DAAA0999C0004	9700	2100	W52P1J
Pending	AFSC (AFSC)	02/18/1999	DAAA0999C0016	9700	2100	W52P1J
Pending	AFSC (AFSC)	02/18/1999	DAAA0999C0016	9700	2100	W52P1J
Pending	AFSC (AFSC)	02/18/1999	DAAA0999C0016	9700	2100	W52P1J
Pending	AFSC (AFSC)	07/30/1999	DAAA0999D0016	9700	2100	W52P1J
Pending	AFSC (AFSC)	09/27/2002	DAAA0902D0025	9700	2100	W52P1J
Pending	AFSC (AFSC)	09/27/2002	DAAA0902D0025	9700	2100	W52P1J

4.) The “Previous Versions” tab allows you to view each prior saved instance of your customized report.

- This is especially helpful if you would like to compare data or go back in time to see when you last ran a version of the report.
- You’ll save time so that you don’t have to re-adjust or remember old filters.

5.) The icons (left side) under “Options” mirror a few of the “Review” tab selections.

-  Review Latest Run
-  Review Excel File
-  Delete the report completely

[f294] Stephen Bernard Cornillie / 2008-11-12 13:15:28 [back reporting list](#)

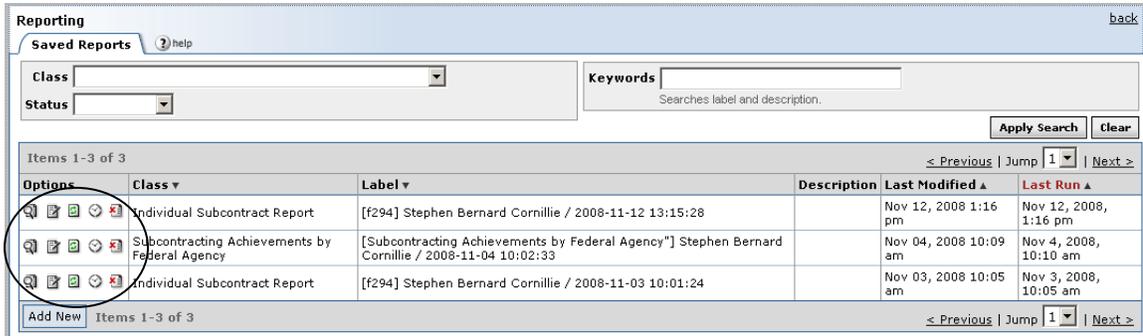
Review Previous Versions Settings ? help

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

Options	Created	Created By	Status	Run Time
  	Nov 12, 2008 1:16 pm	Stephen Bernard Cornillie	complete	00:02

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

- 6.) After you are done viewing the report simply hit **“Reporting List”** in the top right corner and you will be taken back to your list of reports which we discussed earlier.
-  Displays the last run version of your report
  -  Allows you to edit the fields and filters that you previously chose
  -  Regenerates the report to include updates and present-time data
  -  Gives you the ability to view prior versions of the report
  -  Deletes the report from your list



The screenshot shows the 'Reporting' interface with a 'Saved Reports' section. It includes search filters for 'Class' and 'Status', a 'Keywords' search box, and 'Apply Search' and 'Clear' buttons. Below is a table of reports with columns for 'Options', 'Class', 'Label', 'Description', 'Last Modified', and 'Last Run'. The 'Options' column for each row contains icons for viewing, editing, refreshing, and deleting. A red circle highlights the 'Options' column in the first three rows.

Options	Class	Label	Description	Last Modified	Last Run
   	Individual Subcontract Report	[f294] Stephen Bernard Cornillie / 2008-11-12 13:15:28		Nov 12, 2008 1:16 pm	Nov 12, 2008, 1:16 pm
   	Subcontracting Achievements by Federal Agency	[Subcontracting Achievements by Federal Agency"] Stephen Bernard Cornillie / 2008-11-04 10:02:33		Nov 04, 2008 10:09 am	Nov 4, 2008, 10:10 am
   	Individual Subcontract Report	[f294] Stephen Bernard Cornillie / 2008-11-03 10:01:24		Nov 03, 2008 10:05 am	Nov 3, 2008, 10:05 am

This concludes the reporting training presentation. If at any point you have questions on eSRS Reporting (or have any other problems or concerns regarding the system), please contact the DoD eSRS Help Desk.

- Email [dodesrshelpdesk@bta.mil](mailto:dodesrshelpdesk@bta.mil)
- Turnaround time is typically less than one business day.