eSRS Contracting Officer (CO)

User Guide

Last Updated January 23, 2015

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.**

Table of Contents

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 Contracting Officer. 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

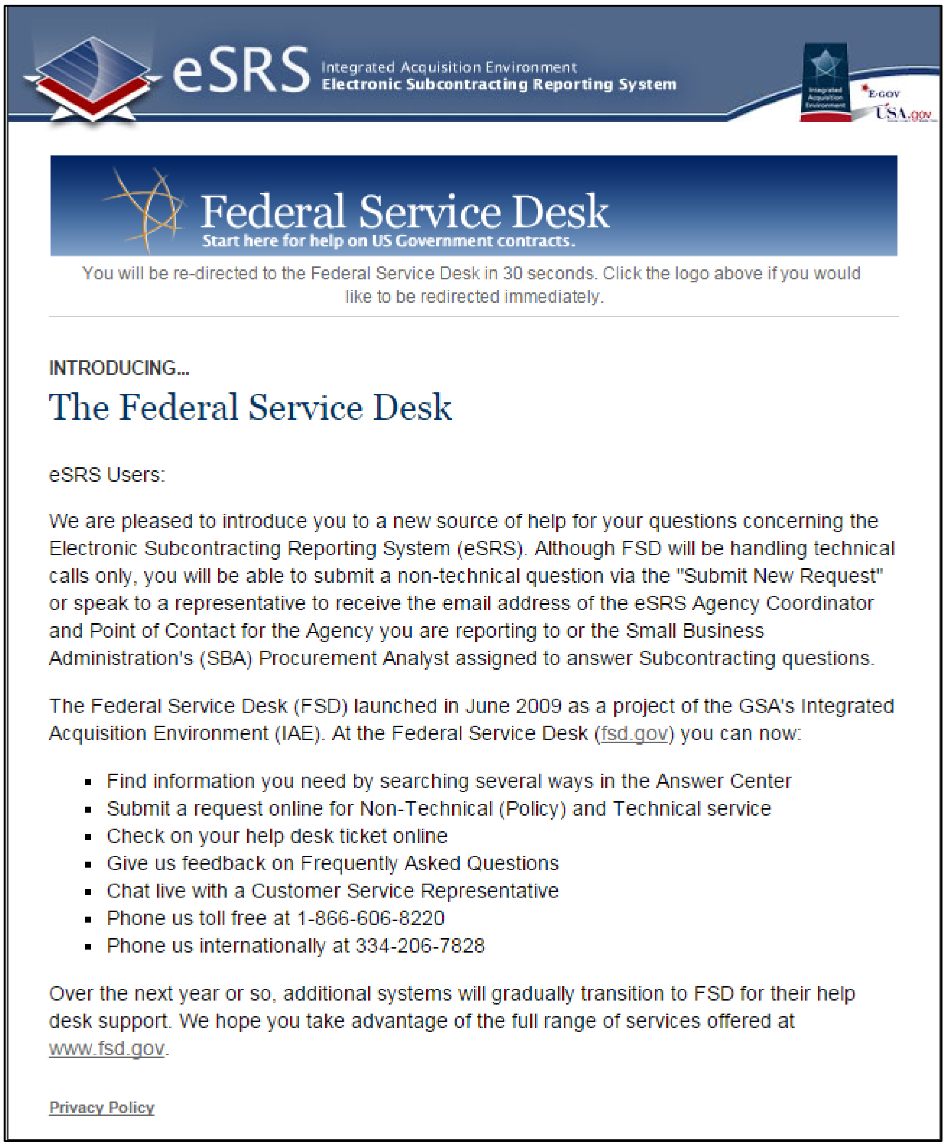
I. Users can access the Federal Service Desk (FSD) directly from within the system. FSD is the help desk organization that provides help desk support for eSRS.gov.

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

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

FSD Transition Page


eSRS Integrated Acquisition Environment Electronic Subcontracting Reporting System

Federal Service Desk
Start here for help on US Government contracts.

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.

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.

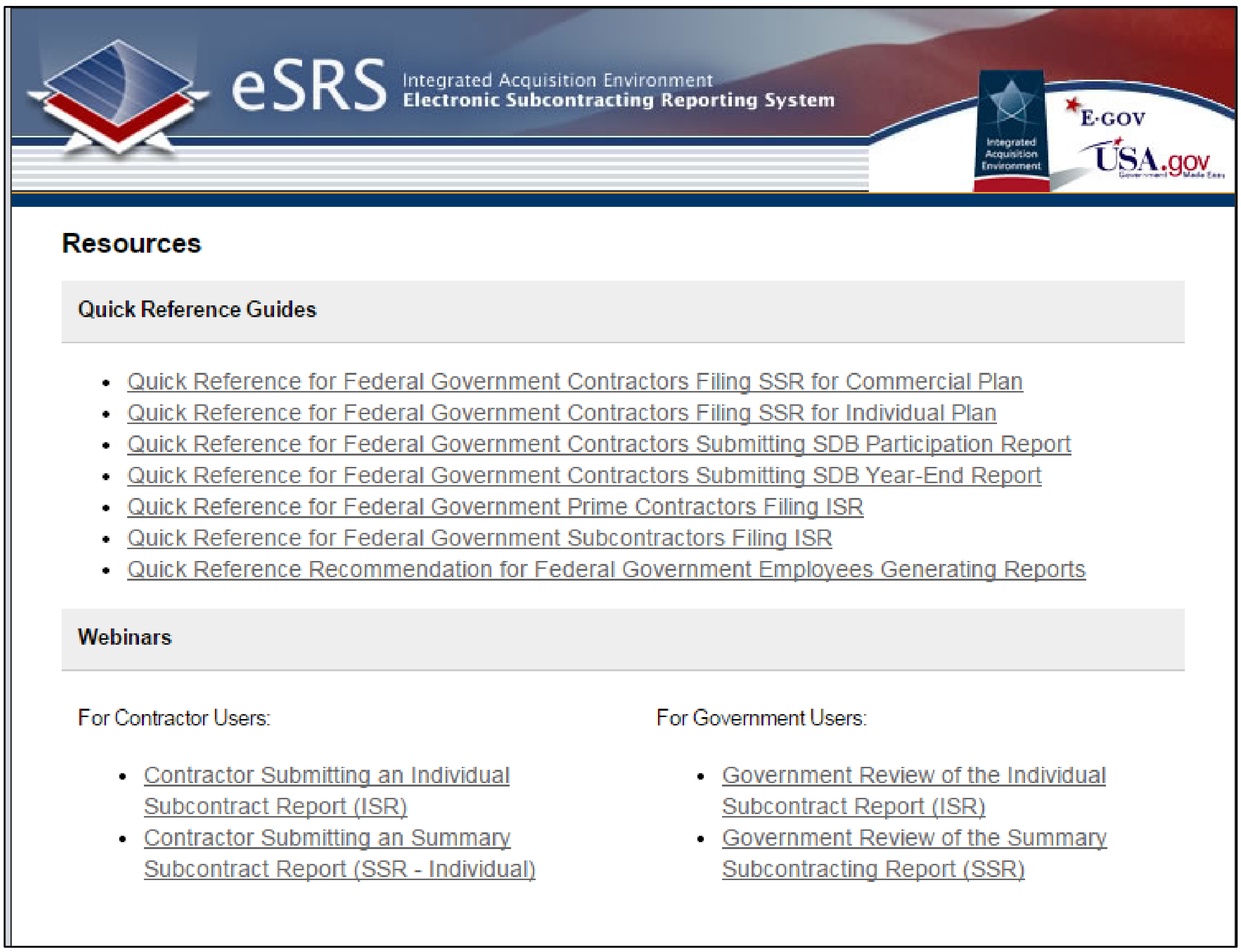
Privacy Policy

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



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 Ace Subaward Reporting System (www.fsrs.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

1.4.3 New Users

I. Users point their browser to https://www.esrs.gov. **NOTE: Users do not need to re-register if they have an existing FSRS Federal Government user account (www.fsrs.gov). The email address and password used for FSRS will allow the user to log-in to eSRS.gov.**

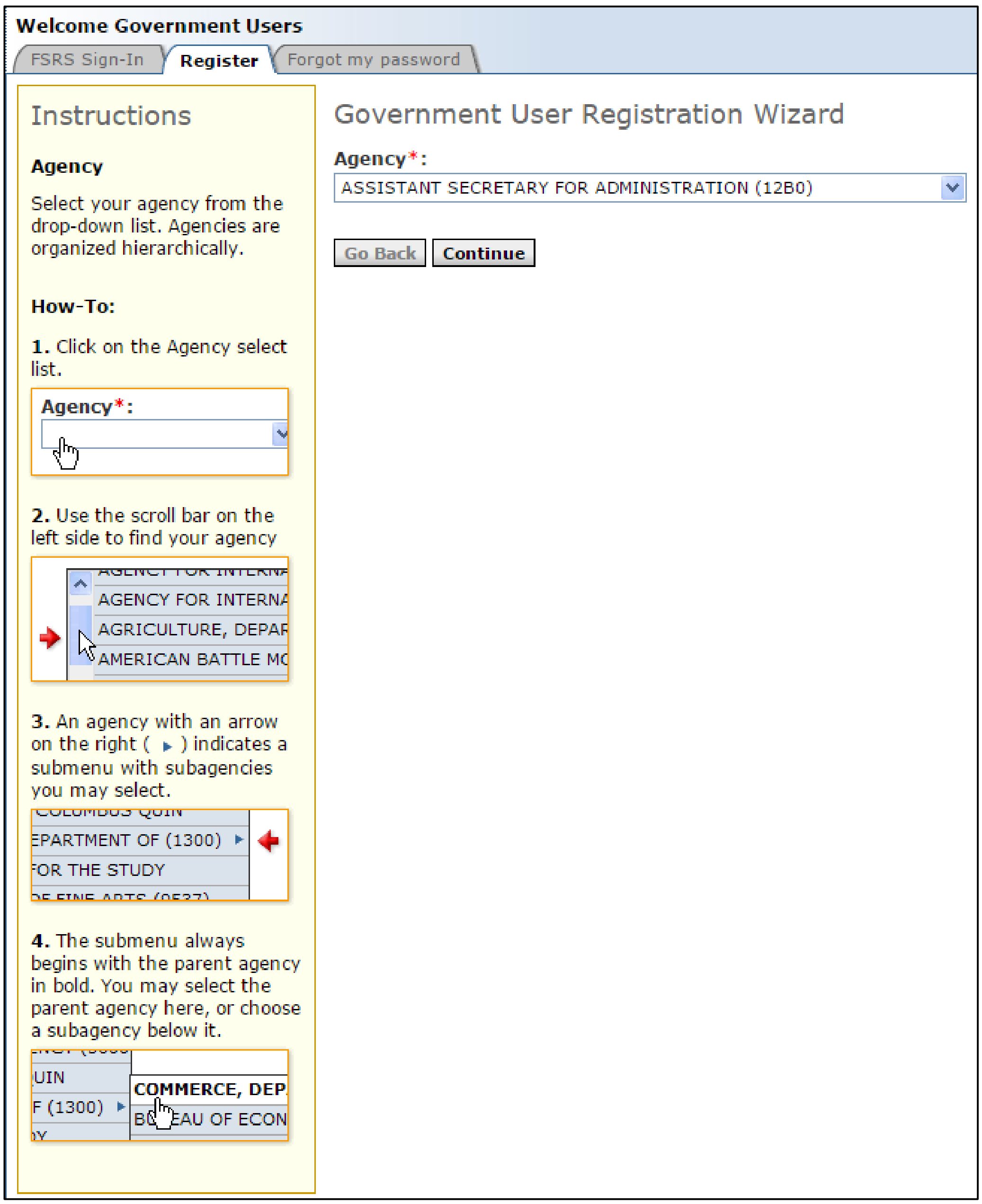
II. The agency user clicks on the “Government” link within the “Log-In or Register Now” box.

III. To register, the user clicks the “Register” tab under the Federal Government Log-In section

IV. The user completes the multi-step process that displays. **Note: Throughout the system a red asterisk (*) designates that the field is required.**

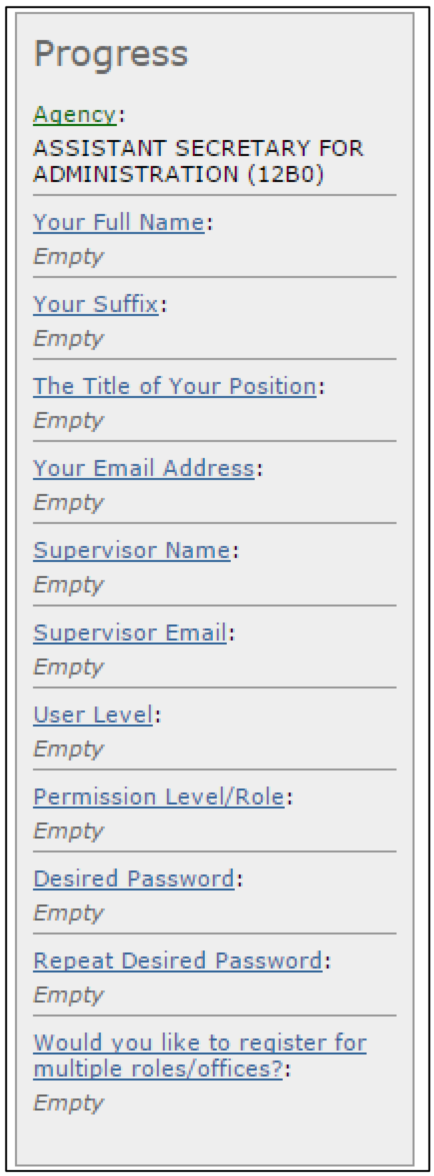
V. Step 1: The user selects their Agency/Sub-Agency association and clicks Continue. **Note: Instructions for each step are provided in a left hand side bar.**

Government Registration Screen Step 1



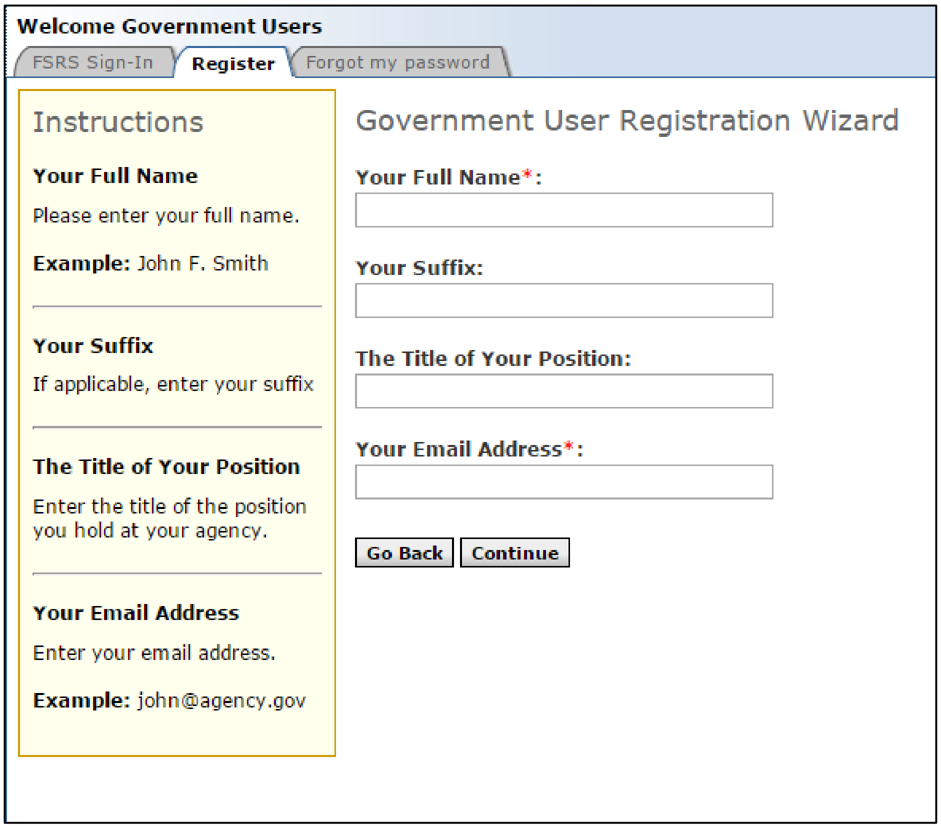
VI. Throughout the registration process a "Progress" bar is provided on the right hand side of each page. At any time in the process you can link on one of the hyperlinks and you will be taken to that step of your registration.

Government Registration Progress side bar



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

Government Registration Step 2



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.

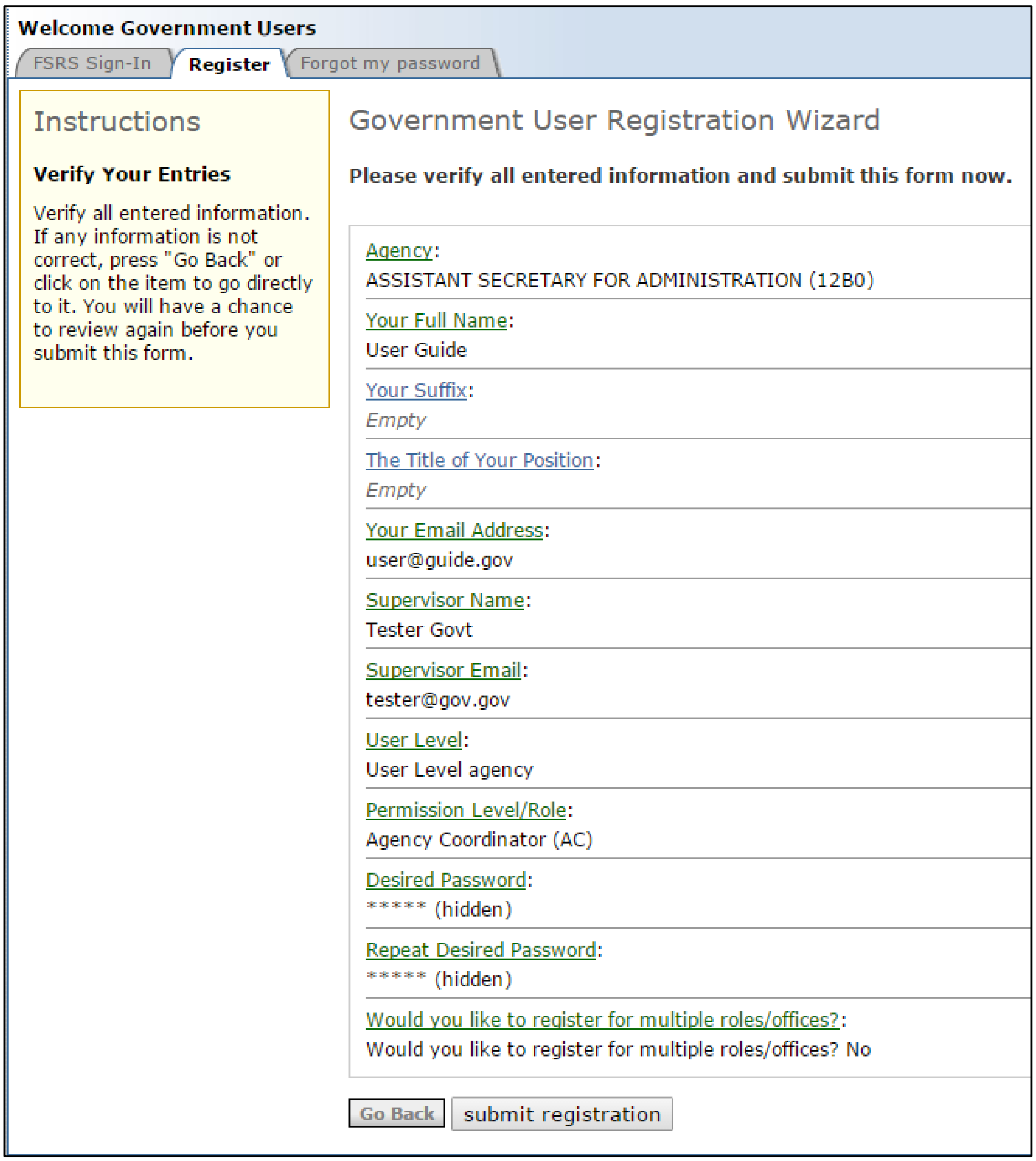
XI. On Step 5, the user is required to select their Permission Level/Role.

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.

Agency:
ASSISTANT SECRETARY FOR ADMINISTRATION (12B0)

Your Full Name:
User Guide

Your Suffix:
Empty

The Title of Your Position:
Empty

Your Email Address:
user@guide.gov

Supervisor Name:
Tester Govt

Supervisor Email:
tester@gov.gov

User Level:
User Level agency

Permission Level/Role:
Agency Coordinator (AC)

Desired Password:
***** (hidden)

Repeat Desired Password:
***** (hidden)

Would you like to register for multiple roles/offices?:
Would you like to register for multiple roles/offices? No

Go Back | submit registration

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.**

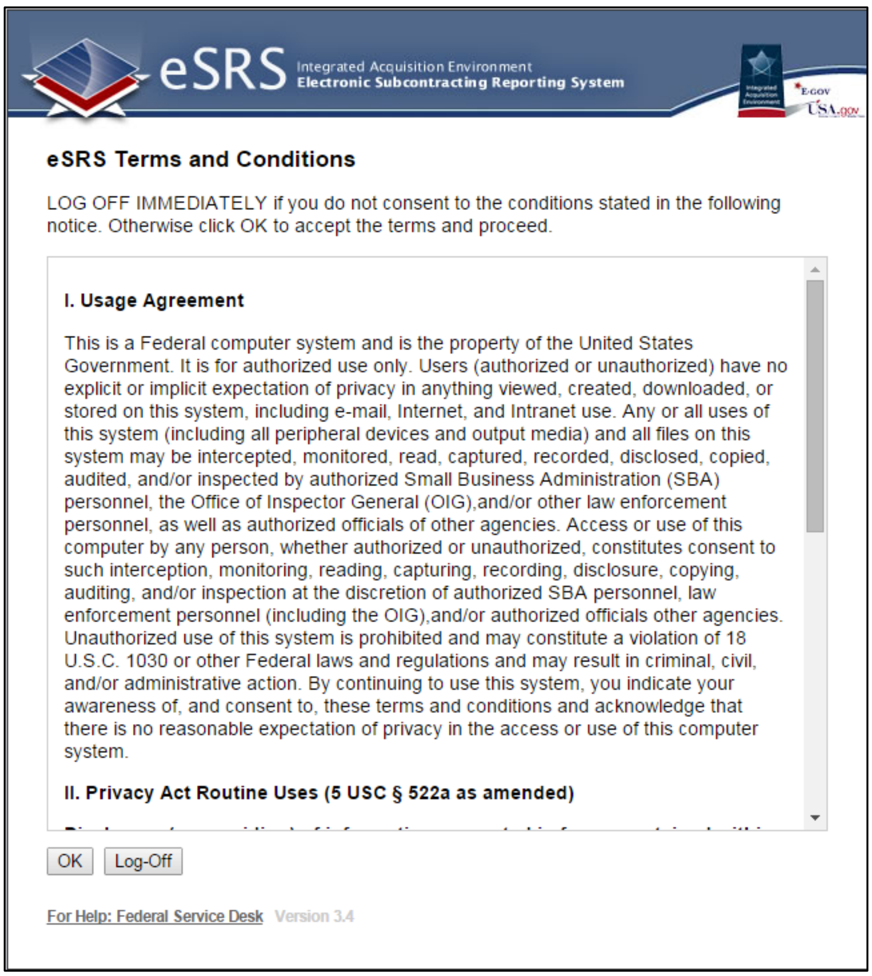
1.5 Terms of Use Agreement

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



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)

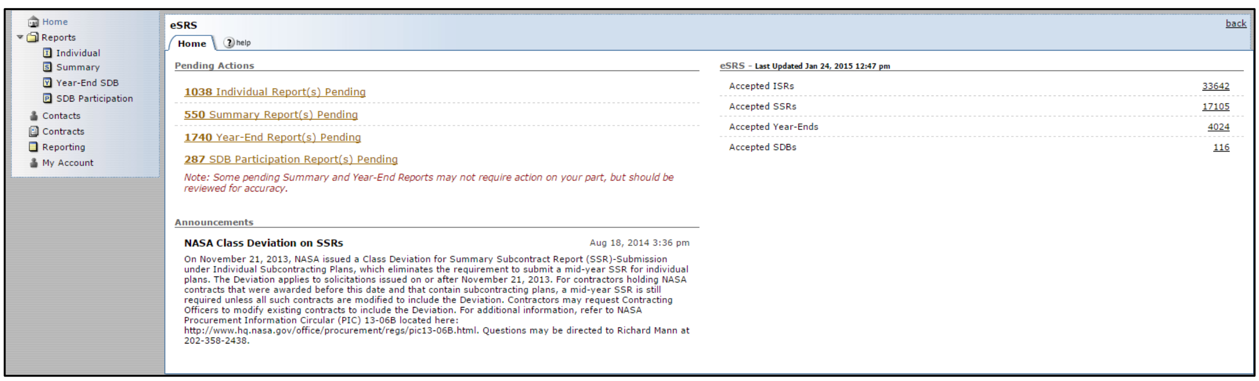
III. On the left hand side of the screen, the navigation menu is shown. This menu is available throughout all pages on the system.

IV. "Pending Actions" will display all items in the system that your account has access to with the status "pending".

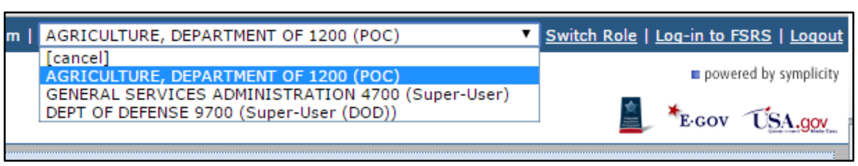
V. Finally, when you are done using the system, please click on the "Logout" link on the top of every page.

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 Contracting Officer Homepage



Switch Role Function



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 us the switch role function in order to manage reports under their various roles.

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.

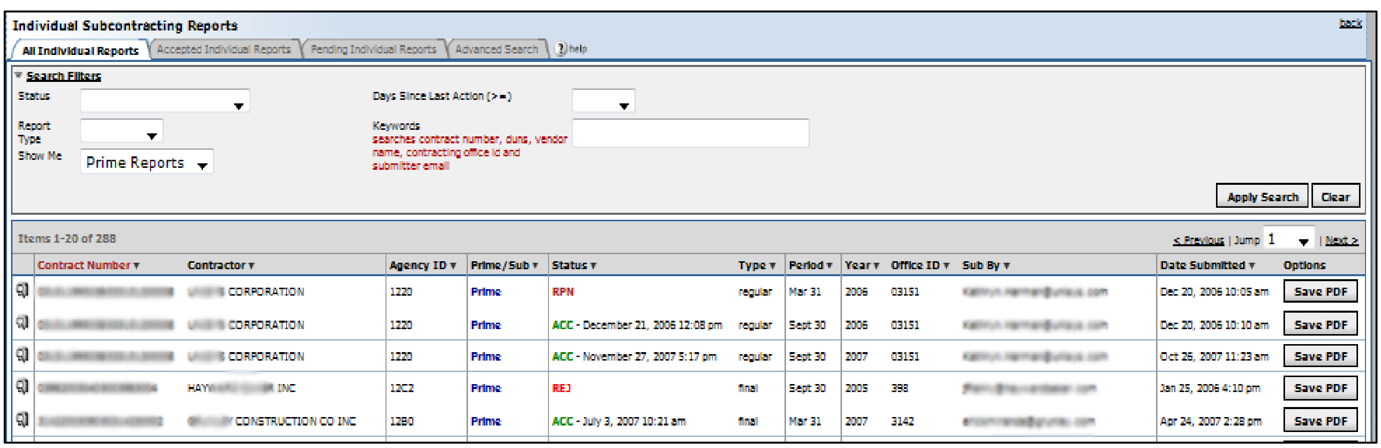
My Account: Resource allows user to update their profile data, change their password, or to request a new role/office affiliation for their account.

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



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.

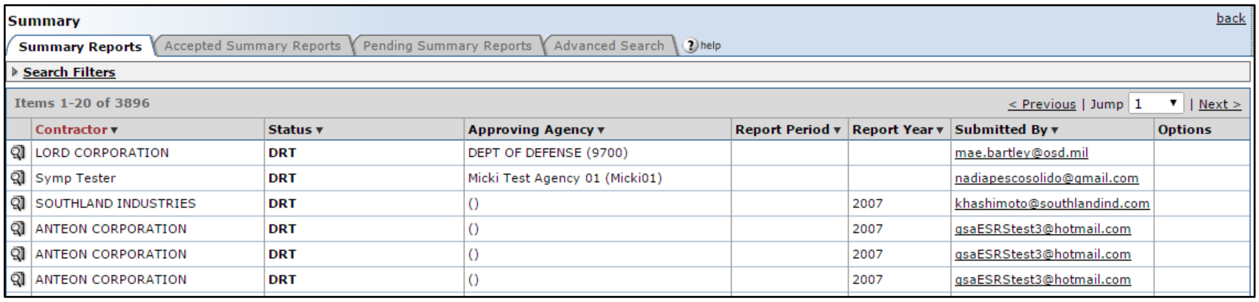
IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated 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

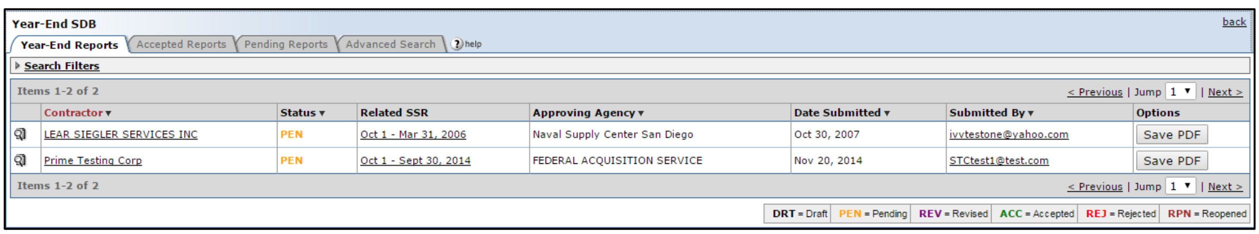
Items 1-20 of 3896 | < Previous | Jump 1 | Next >

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 Testing 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 Report

I. Click on “Reports” and then “SDB Participation” on the left hand navigation menu.

Note: The SDB Participation Report is an optional report.

II. You will see a screen similar to the Year-End SDB Reports Screenshot below.

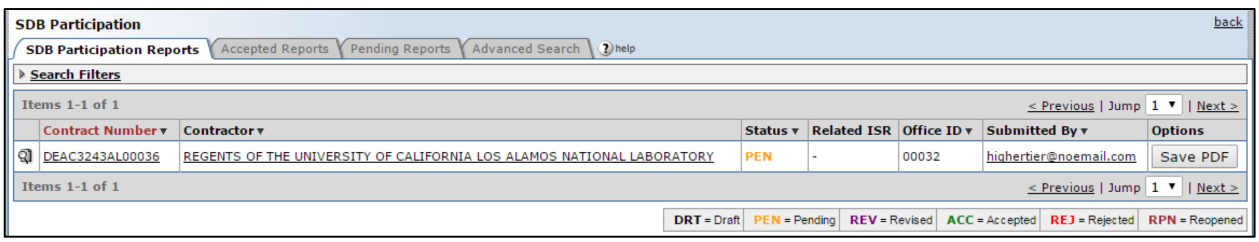
III. Click on the View Icon beside any report to see more information regarding the filed report.

IV. You may sort the list of reports based on column. This is accomplished by clicking on the text next to any down arrow in the column headings. You may sort the list in ascending order if you click on the same heading again. Note how the color of the text changes. The current active column is designated by a Maroon color.

V. You may also view only specific types of reports using the search fields above the list or by clicking on the tabs near the top of the screen.

VI. Notice, this screen will only show twenty reports at a time. To view more, simply click on the “Next >” or “< Previous” links to traverse through the list.

SDB Participation Reports Screenshot

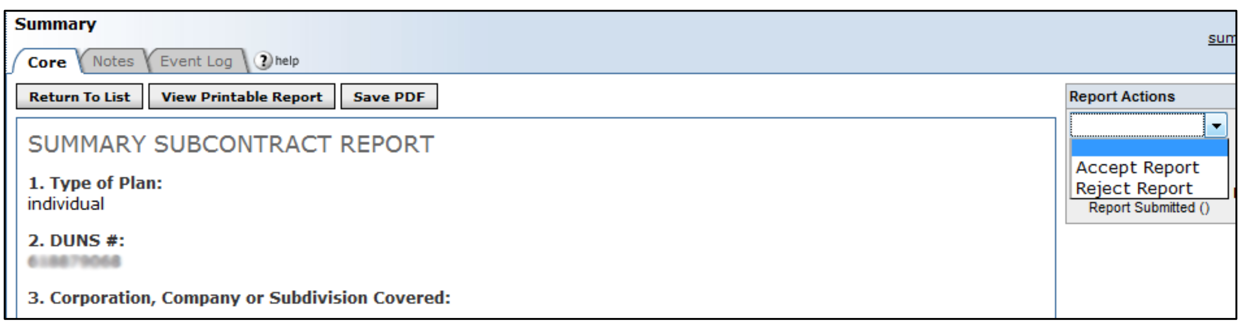


3.5 Accept / Reject (No Administering Agency Designated on Report)

The processes to accept or reject individual and summary reports are the same. To accept or reject, simply go to the section (Individual or Summary) that the report is filed. Click on the “Pending” tab near the top of the screen, and find the report that you would like to accept or reject.

I. Click on the View Icon beside the report. **Note: you may only accept/reject Pending or Revised Reports.**
II. Select Accept Report or Reject Report from the “Report Actions” drop down box on the right sidebar.
III. If you accepted the report, you may return to the report list by clicking on the “Back to Reports List” button.
IV. If you clicked “Reject Report” you will be redirected to a page with a form. Please fill this form out with information why the report was rejected. After completing the form, click “Submit” to finalize the rejection.
V. You may also use the buttons along the top to view a print preview, save as PDF, or return to the reports list.

Accept/Reject Screenshot

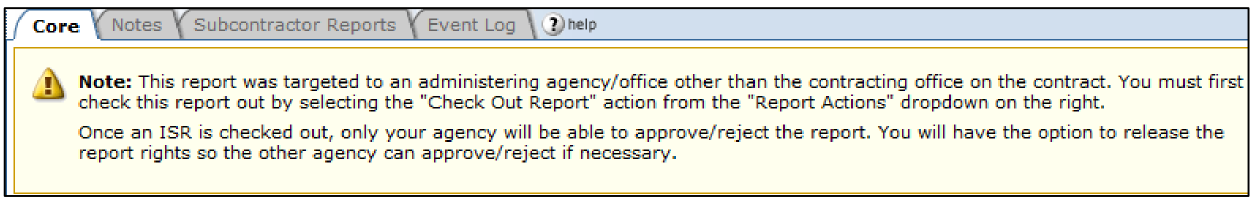


3.6 Accept / Reject (Administering Agency Designated on Report)

This section will outline the process for managing Individual reports on which the contractor designated an Administering Agency other than the Contracting Office on the contract.

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

Administering Agency conflict message

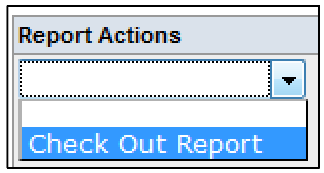


NOTE: In order to Accept/Reject a report that has an Administering Agency, the "Check Out" function must be available. If the "Check Out Report" action is not available, you will need to request that the report be released by the agency who currently has the report checked out.

3.6.1 Accept/Reject

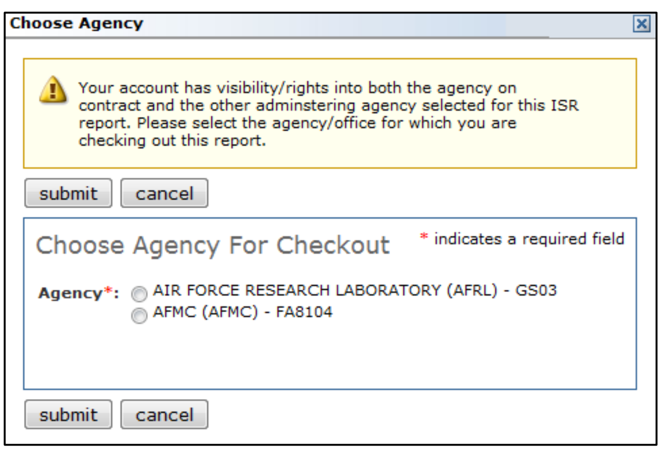
I. Click on the View Icon beside the desired report.

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.**

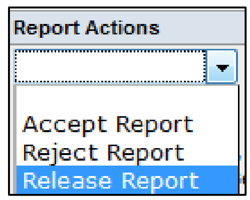


Note: If you are registered at a level above both the Contracting Office on the contract AND the designated Administering Agency in the report, you will be required to select the Agency/Office for which you are checking out the report. **Example:** The Contracting Office on the report is AFRL and the 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



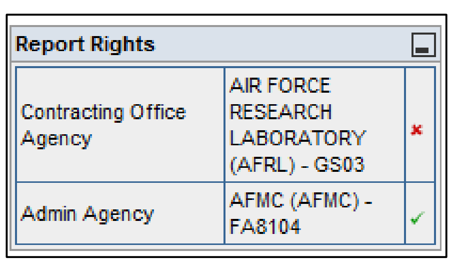
III. If you have the report checked out, you will be able to select “Accept Report” or “Reject Report” from the “Report Actions” drop down box on the right by clicking on the appropriate action. A notification box will appear to allow you to enter a note for the report that will be viewable by all parties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

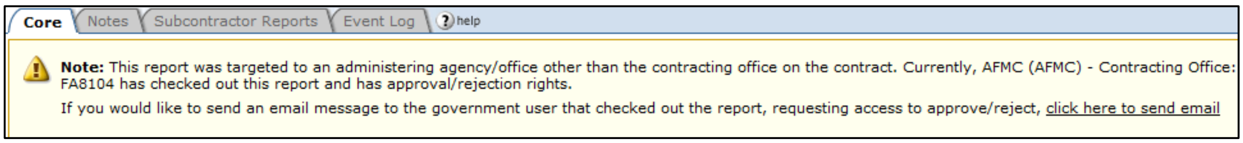
3.6.2 Request to Release a Report

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.



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

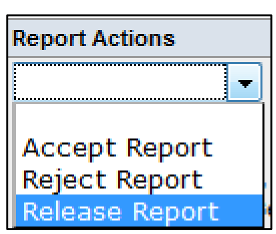


After clicking on the "click here to send email" link, your email client will generate a new email message with the "To" and "Subject" fields pre-populated. The email will be sent to the agency user who currently has the report checked out with the subject "Request Access to ISR Report."

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

3.6.3 Release a Report

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

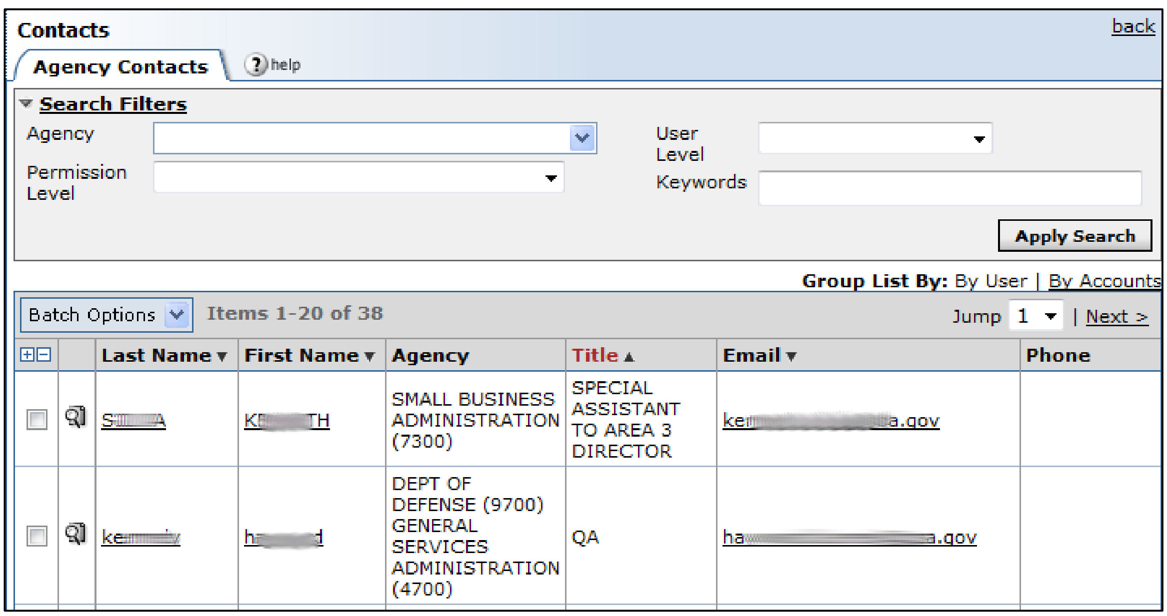


Section 4 Agency Contacts

4.1 View Agency Contacts

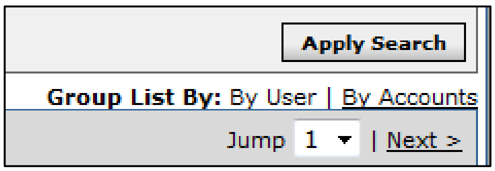
I. Click on “Contacts” from the left-hand navigation menu.
II. The list will default to ALL registered government users; however, you can use the Search Filters to refine the list by Agency, Permission Level (Account Type), User Level (agency or contracting office) and/or Keywords (e.g., name, email).
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



4.2 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.



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.

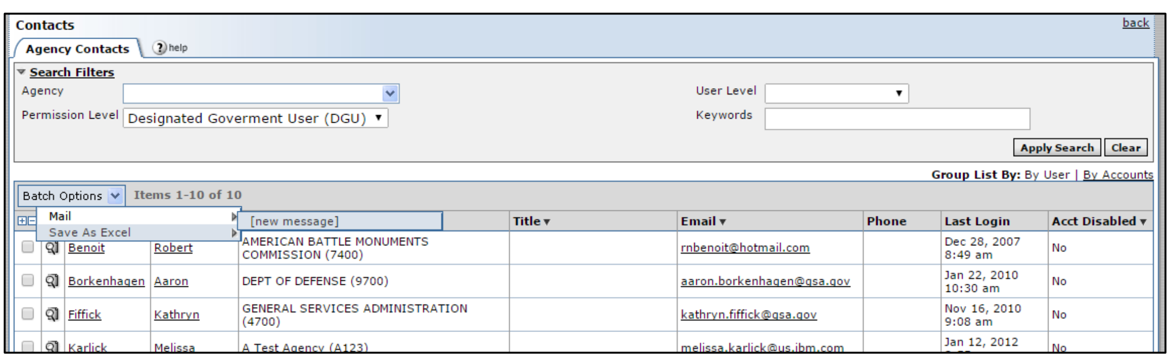
III. The "Group List By Accounts" option will display each account in one row of the main list. This means that if a user has multiple accounts or "hats" associated with their user registration, each account will be listed in its own row. When in this view, you will be able to sort by Agency or Office.

4.3 Batch Options: Mail

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

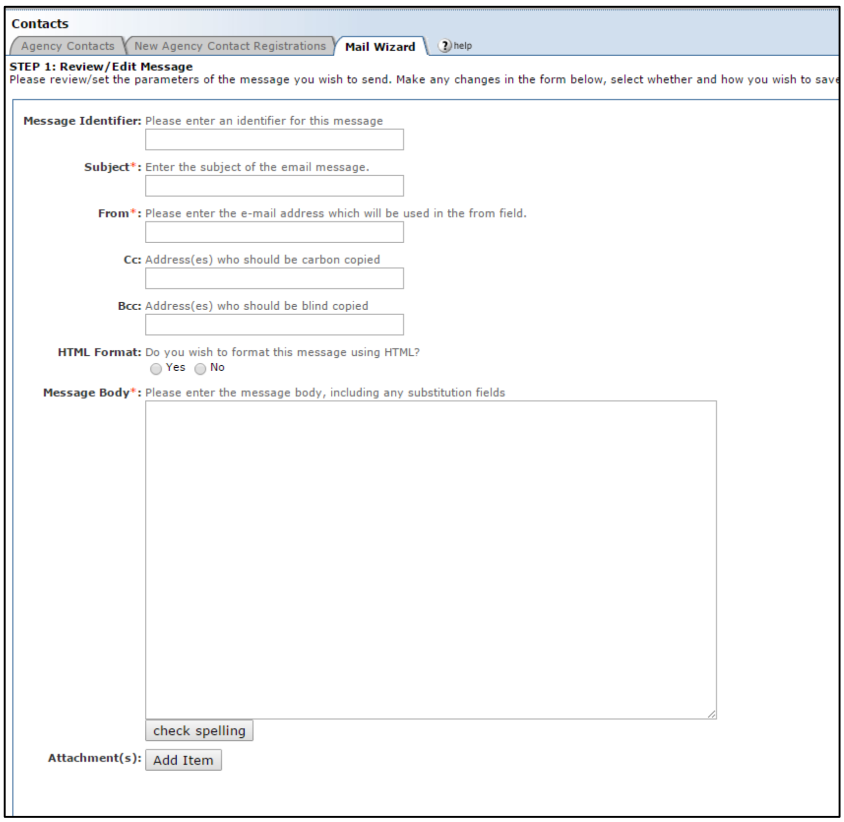
II. After selecting the desired contacts, you can send an email message to all by selecting Batch Options -→ Mail -→ [new message]

Batch Option: Mail>New Message



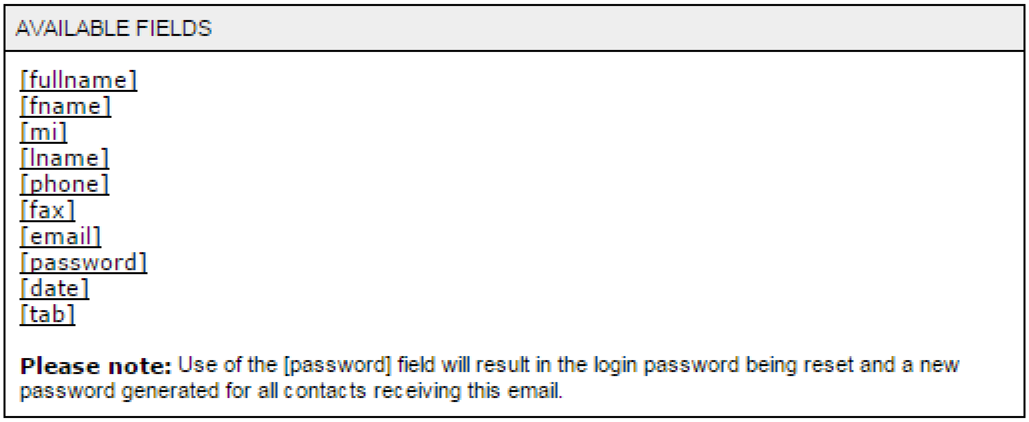
III. The Mail Wizard tab will display for you to create the details/parameters for your batch mail message. Complete all required fields and click “next” to continue.
IV. Review the list of recipients and make any desired changes to the list.
V. Click “Prev” to return to Step 1.
VI. Click “Cancel” to stop the action.
VII. Click “Send Messages” to begin the mailing process.

Batch Option: Mail>Mail Wizard Step 1

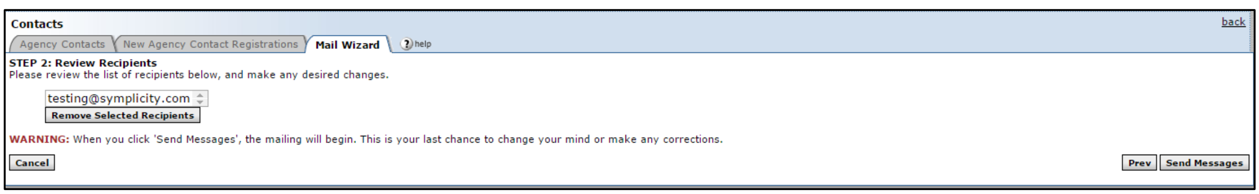

Contacts
Agency Contacts | New Agency Contact Registrations | Mail Wizard | help
STEP 1: Review/Edit Message
Please review/set the parameters of the message you wish to send. Make any changes in the form below, select whether and how you wish to save

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
check spelling
Attachment(s): Add Item

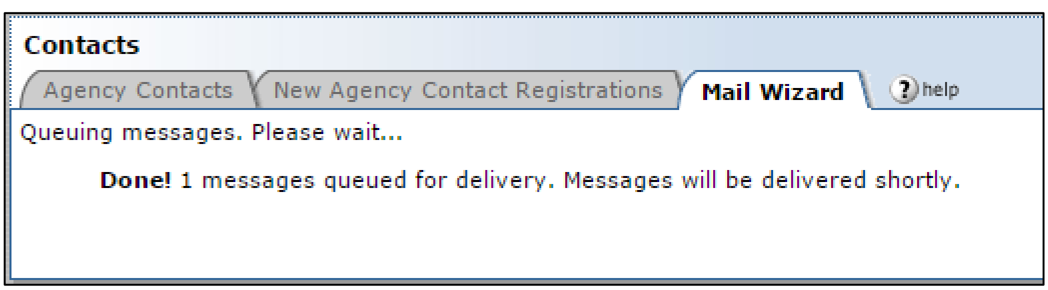
Mail Available Fields



Batch Option: Mail>Mail Wizard Step 2



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



4.4 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.

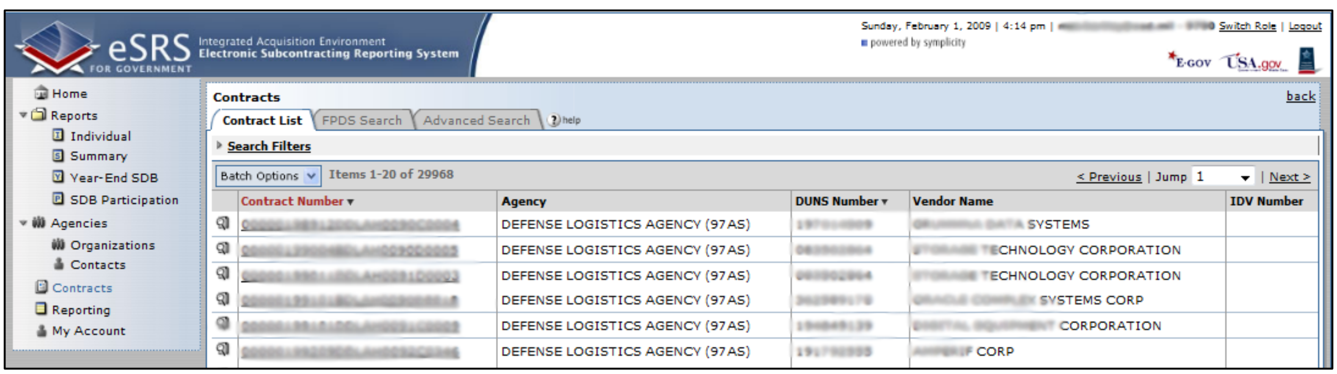
III. You can also save an entire page as an excel file without having to select specific contacts by clicking Batch Options -→ Save As Excel -→ This Page. A pop-up will appear with the option to open the file or save the file.

Section 5 Contracts

5.1 Viewing Contracts

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

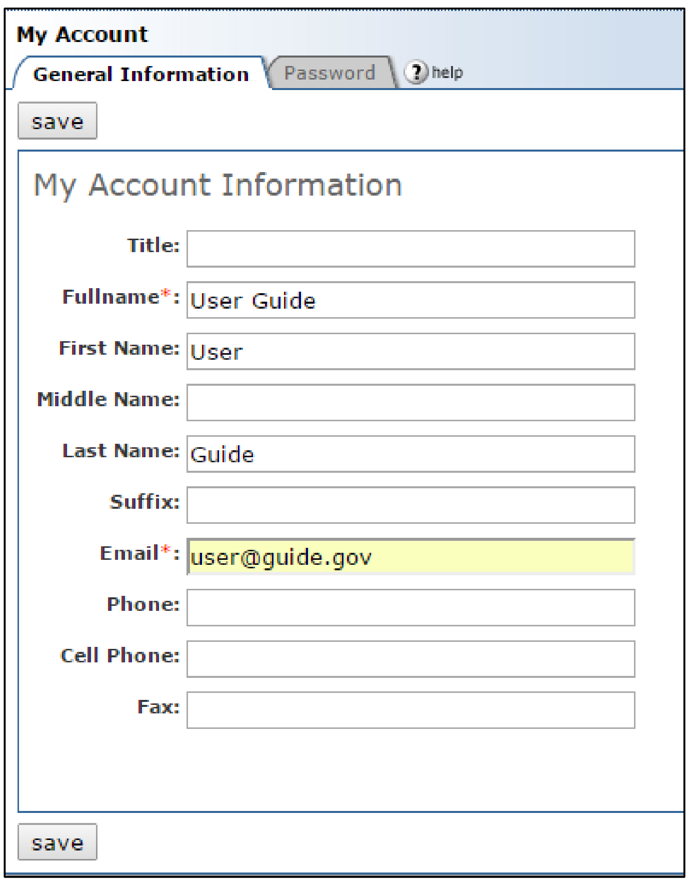


Section 6 My Account

6.1 Viewing Account Record

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.

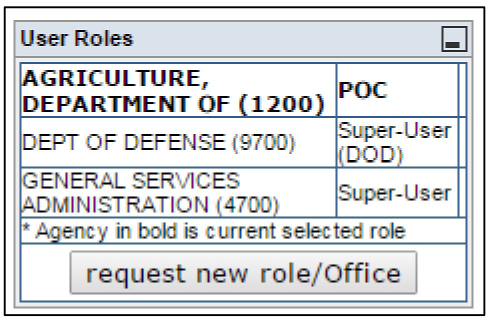
My Account General Information tab



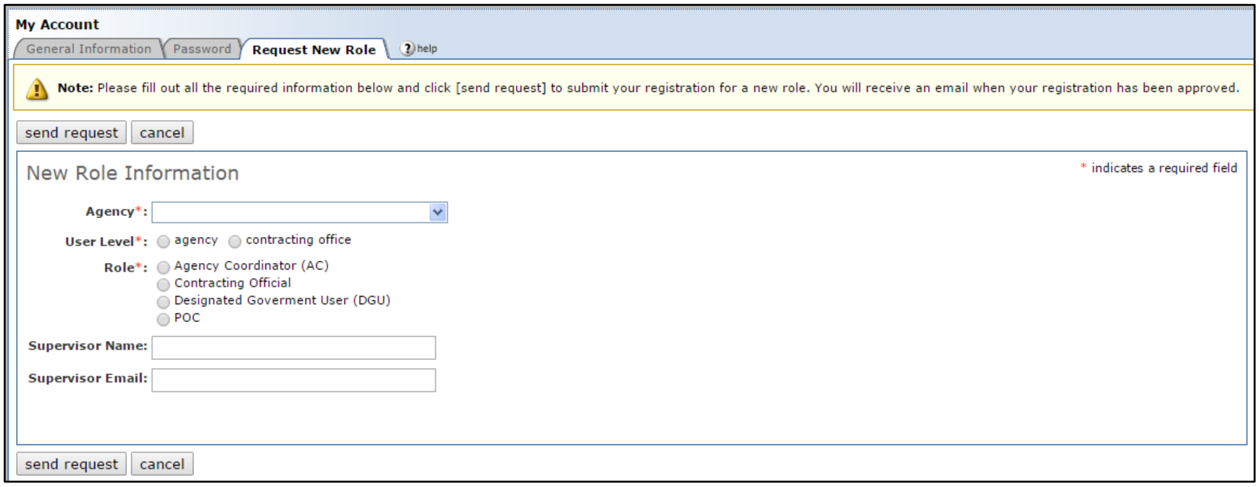
6.2 Request New Role/Office for an Account

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



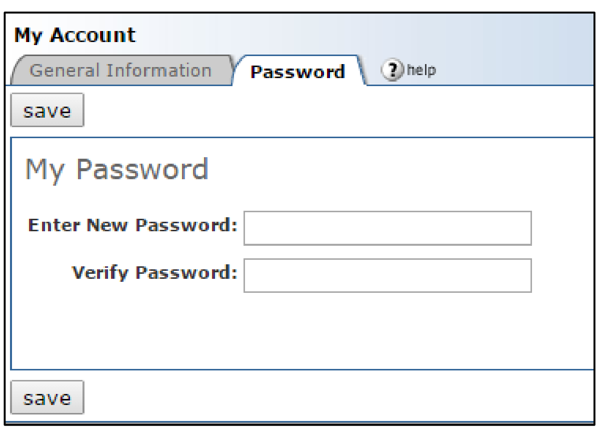
Request New Role Form



6.3 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



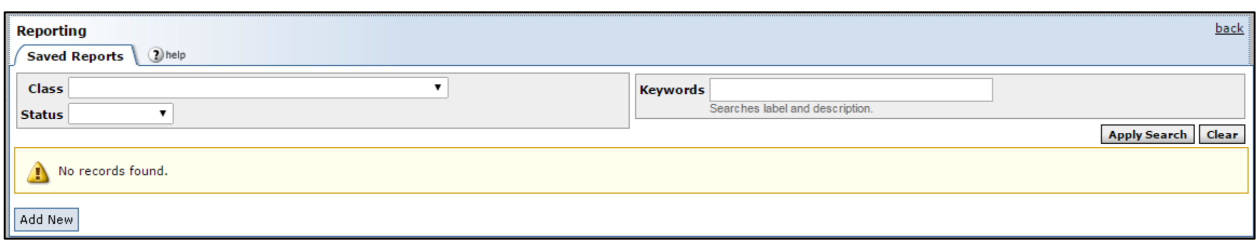
Section 7 Reporting

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.

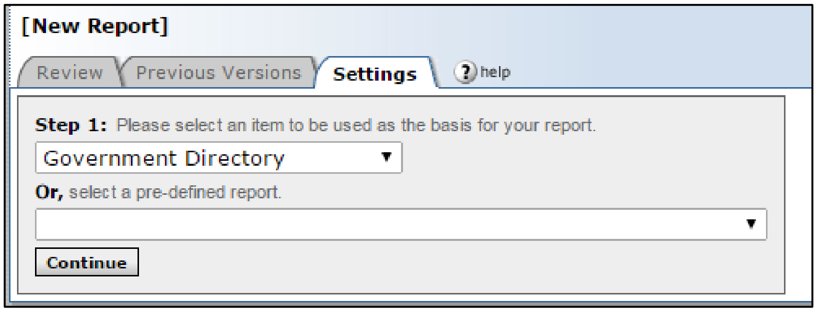
7.1 Build New Reports

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.

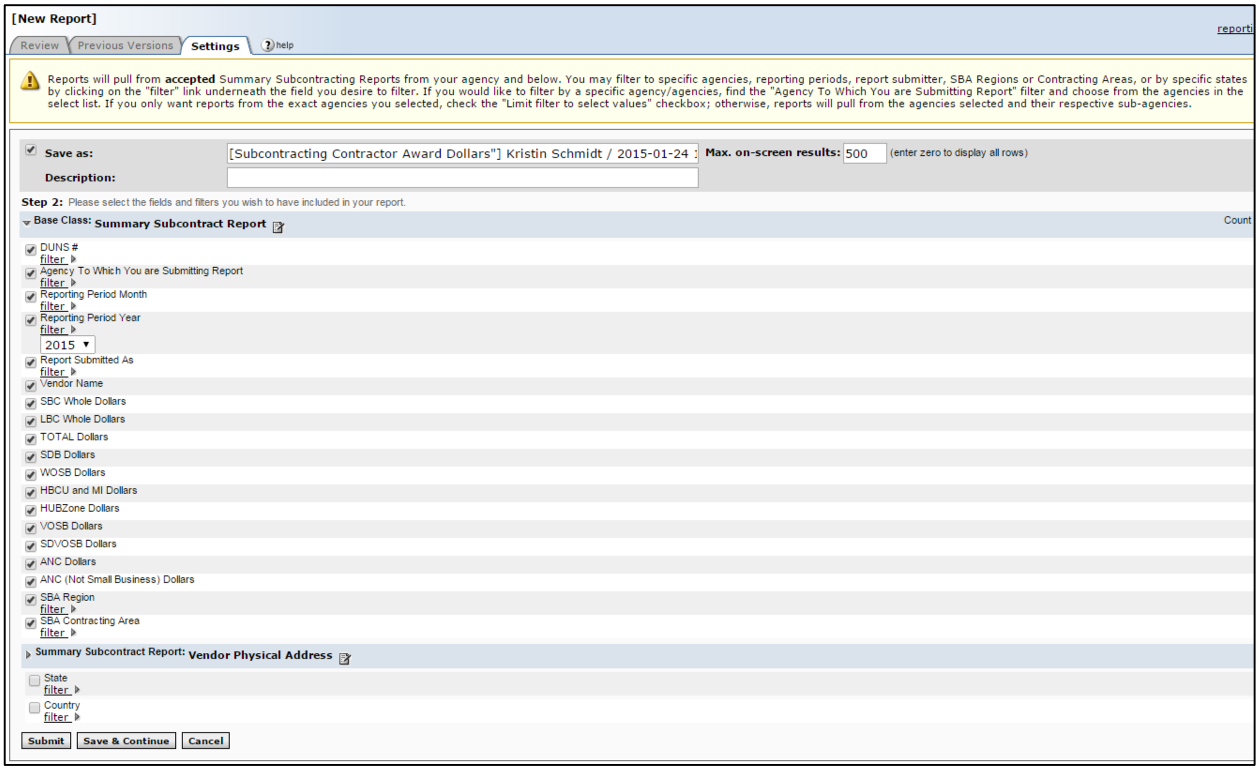
Government Directory
Contractor Directory
Individual Subcontract Report
Summary Subcontract Report

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

Build a New Report



7.2 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	
	4,650,537	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	1,685,872	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

7.3 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