User Reference Guide

Part 3: Data Bank Contract Data (FPDS) Administrative Reports

(Revision 1.2.1)

U.S. General Services Administration

For more information about the IAE, contact us at **iaeoutreach@gsa.gov**

Revision History

Revised on	Version	Description
02/07/2020	0.1	Baseline
03/09/2020	1.0	Update for favorites functionality
03/11/2020	1.1	Release version
09/04/2020	1.2	Multiple Organizations
10/22/2020	1.2.1	Add Data Refresh

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Overview

The purpose of this document is to provide guidance on the Contract Data (FPDS) Administrative Reports.

User Guides for other types of reports are provided as separate documents.
The Contract Data (FPDS) reports include 4 groups below:

1. Standard reports
2. **Administrative reports**
3. Static Reports
4. Ad Hoc Reports

The corresponding videos, and other help resources are located in the Learning Center of beta.SAM.gov. Contract Data is the domain for FPDS (Federal Procurement Data System) information.

About Administrative Reports

There are currently eight Contract Data Administrative Reports represented in the Data Bank section. The list of the Contact Data Administrative Reports is included in Appendix A.

Registration: Users must register (sign up) and have Contact Data *SAM PMO Admin* or *Administrator* role in order to access the Contract Data (FPDS) Administrative reports.

To learn more about requesting a role, please review related material in the learning center.

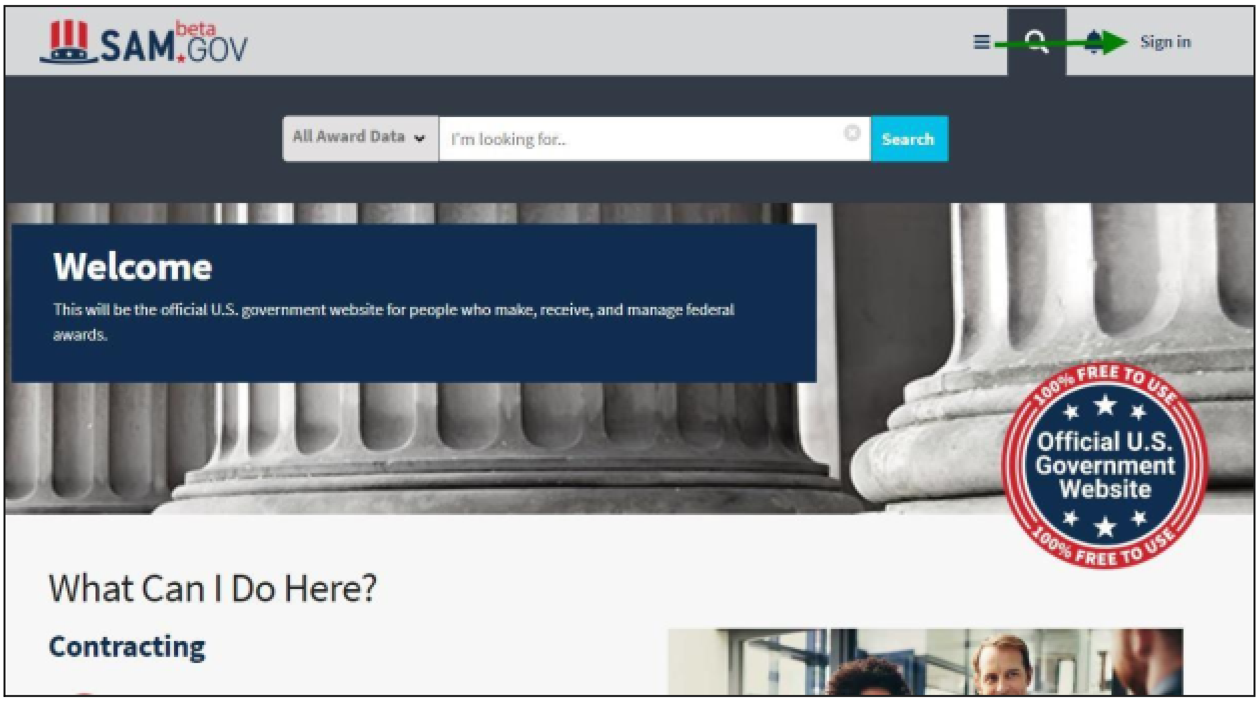
Data Access: Data access is controlled based on your role and Department/Agency. You can view data only within your Department/Agency, which will be pre-filled for you on report criteria section from your beta.SAM.gov profile. Non-DoD users are subject to a 90-day delay for the DoD funded awards. Audit Procedures and Status of Actions report use live data.

Report Date Range & Data Size Limitation: Most reports can be generated using data up to 12 consecutive years, while others are limited to less data as per report requirements. For example, an Audit Procedures Report can include only 12 months of data at a time. After user executes the report, if the report returns a large data set, a 150,000-row limit of the report records has been implemented to ensure acceptable system performance. This **Data Size Limitation** is increased from 30,000-row in the FPDS system.

Accessing Administrative Reports

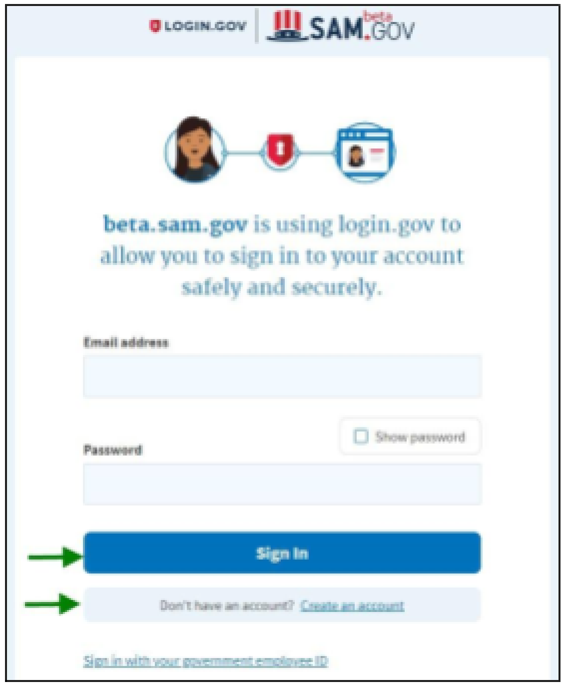
Follow these steps in order to access the Administrative Reports:

1. Navigate to: https://beta.SAM.gov
2. Click on the **Sign-in** link



3. Click Accept to accept U.S. Government System terms.

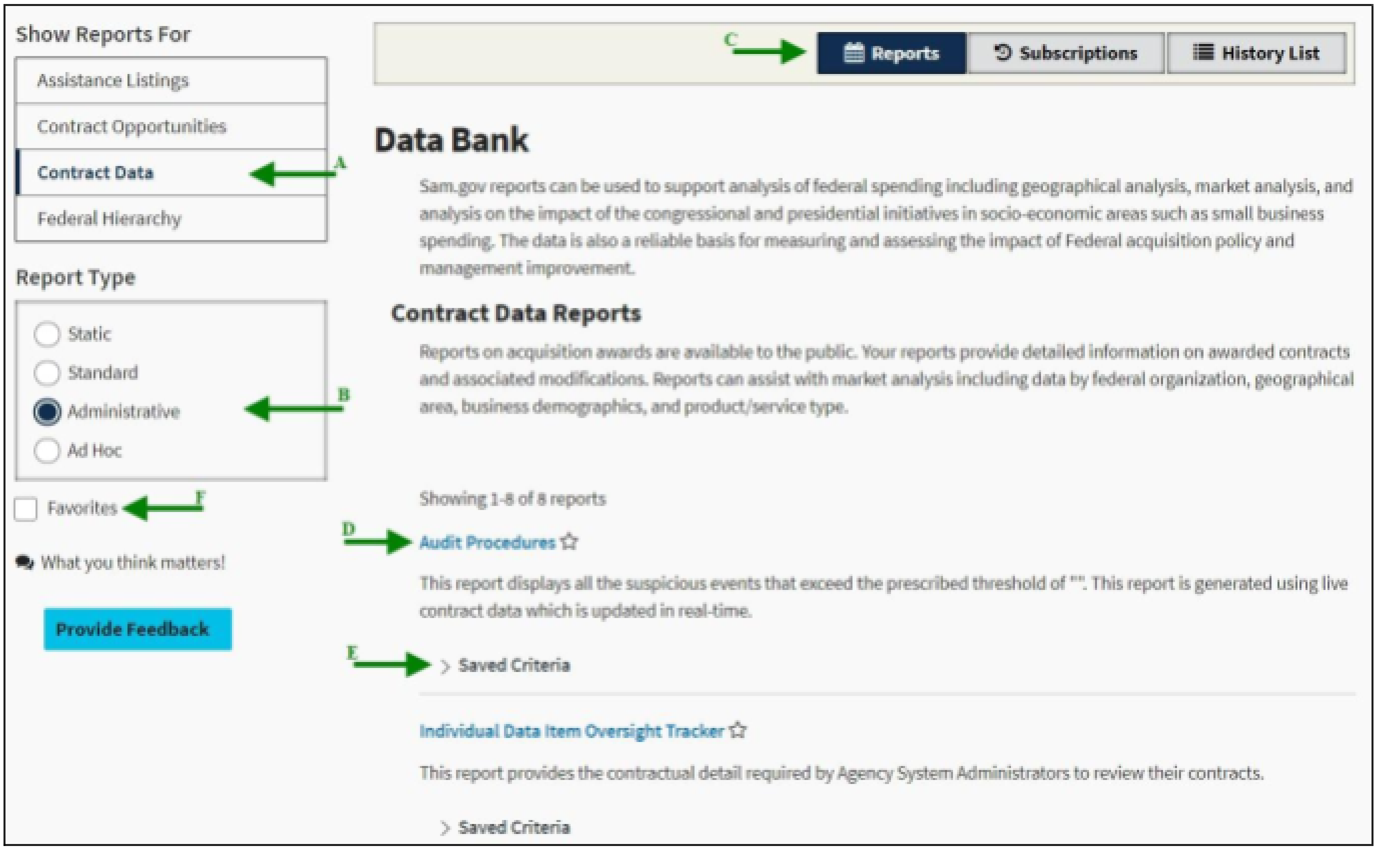
4. You will be navigated to Login.gov for authentication. Create an account or sign in if you already have one.



4. After login, navigate to the Data Bank page by clicking the hamburger menu, then click on the **Data Bank** icon.

The Data Bank Home Page - Administrative Reports

Navigate to the Contract Data Administrative Reports page by selecting *Contract Data* and then *Administrative* in the left menu.

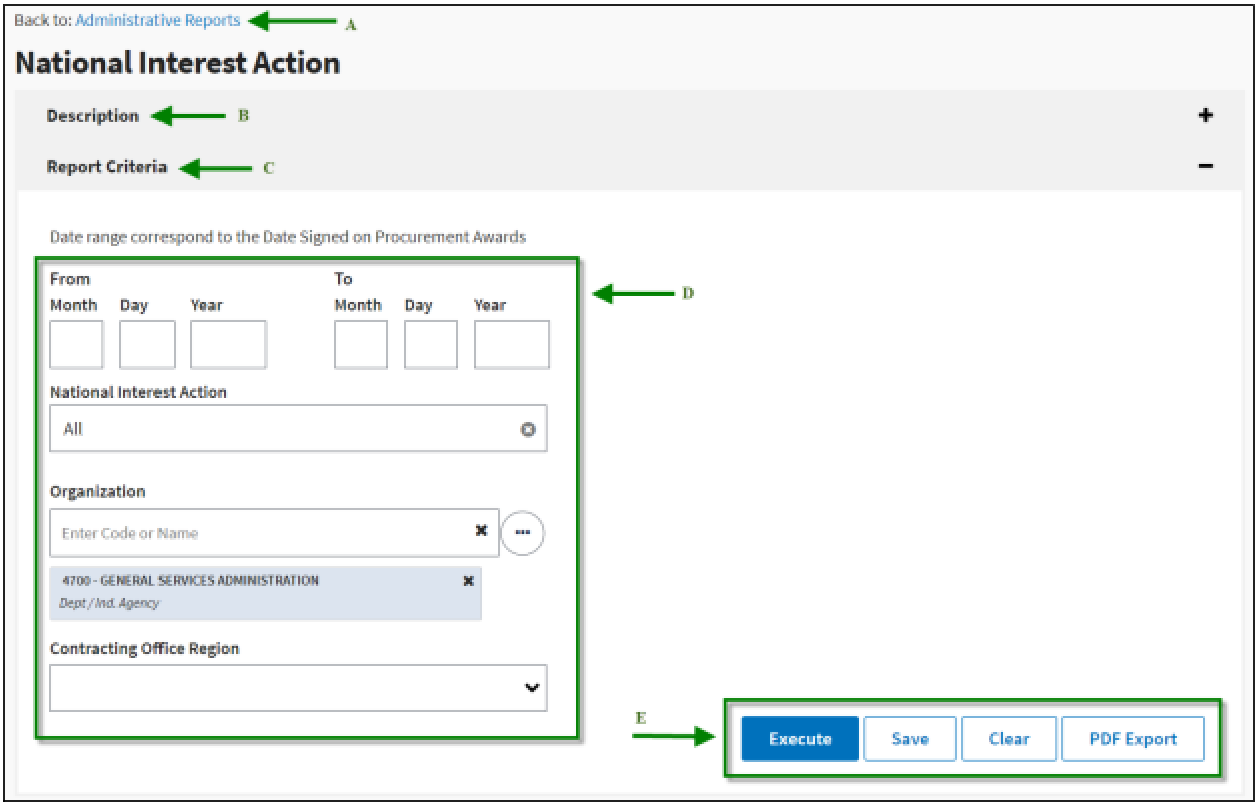


Key elements of the Data Bank – Contract Data Administrative Reports page:

A. All available domains are located at the left navigation bar on the page
B. Report types are available under the domain selection
C. Toggle between Reports, Subscriptions, and History List. This menu is available only to users who have permissions to subscribe to reports.
D. Available Administrative reports
E. Saved Criteria for each report.
F. Favorites toggle. When this toggle is checked, only reports marked as favorites are displayed. Click on the star icon next to a report name to mark this report as a favorite. Click on the star icon again to remove a report from favorites.

The Report Prompt page

When a user selects a report, the system displays the Report Prompt page. This page allows the user to enter report criteria and execute the report.



A. **Back to Administrative Reports** takes the user back to the home page of Administrative Reports.
B. **Description** provides basic information about the selected report. User can click “+“ to open the **Description** accordion.
C. The **Report Criteria** allows the user to enter specific criteria parameters to filter the FPDS data when executing the report. User can Click “–“ to close the **Report Criteria** accordion.
D. The Report Criteria contains several components which vary for each individual report:
    - From Date and To Date for Date Signed on the Procurement Awards - required fields and must be entered
    - National Interest Action
    - Organization
    - Contracting Office Region

E. **Organization** allows you to select entities on different levels of Federal Hierarchy. You can enter code or organization name. You can also access the Federal Hierarchy selection screen by clicking on the “…” button.

In the report prompt, users can now select up to 20 Organizations. The previous limit was 10. This enhancement allows users retrieving report data with more Organizations within one report execution. These 20 orgs are applicable to the FH office report also.

Example:

Scenario 1 - Add 9700(Dept of Defence), 4700, 1400 at level of Dept/Ind Agency the report displays all 3 depts. Selected

Department	Total Actions	Total Dollars	Large Business Actions	Large Business Dollars	Small Business Actions	Small Business Dollars	Total Education Actions
DEPT OF DEFENSE (9700)	58,867,924	$350,259,424,074.31	57,117,255	$270,712,825,426.35	1,656,871	$69,685,013,580.77	7,392
GENERAL SERVICES ADMINISTRATION (4700)	1,316,936	$15,461,144,939.65	277,915	$10,655,243,793.57	723,237	$4,162,639,512.56	371
INTERIOR, DEPARTMENT OF THE (1400)	50,077	$3,738,561,160.63	13,809	$1,539,489,816.25	33,150	$2,033,894,093.16	472
Total	60,234,937	$369,459,130,174.59	57,408,979	$282,907,559,036.17	2,413,258	$75,881,547,186.49	8,235

Scenario 2:

Scenario 2 - Add 9700, 4700, 1400 at level of Dept/Ind Agency, and 5700, 4732 at level of Sub-tier-the **lowest** level in this scenario is sub-tier and mapped department information is displayed in the report

Department	Contracting Agency ID	Total Actions	Total Dollars	Large Business Actions	Large Business Dollars	Small Business Actions	Small Business Dollars	Total Education Actions
DEPT OF DEFENSE (9700)	5700	93,172	$65,471,731,377.22	40,021	$49,616,070,639.10	49,042	$12,306,254,006.87	1,479
GENERAL SERVICES ADMINISTRATION (4700)	4732	1,288,094	$12,340,416,980.32	271,569	$9,439,650,571.19	702,705	$2,544,472,937.75	316
Total		1,381,266	$77,812,148,357.54	311,590	$59,055,721,210.29	751,747	$14,850,726,944.62	1,795

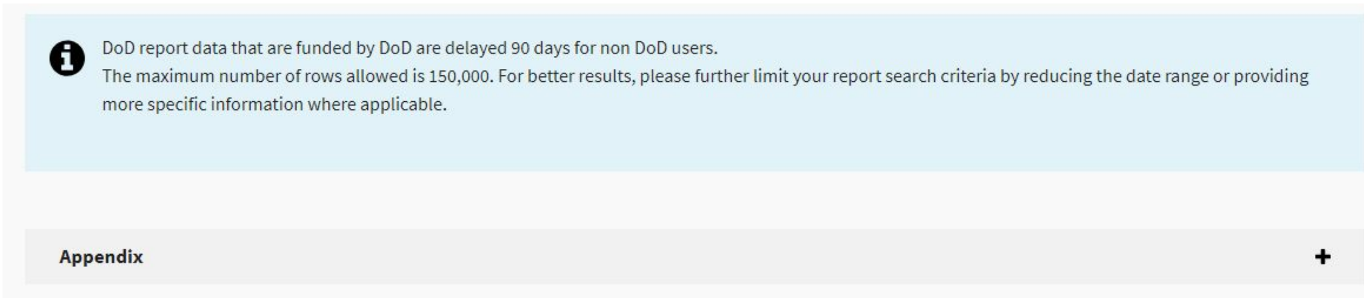
Scenario 3 - Add 9700, 4700, **AMC** (Major Command)
-the report displays only records for DoD with AMC as major command
-4700 is excluded from the report as the lowest level is mapped to the parent and the other departments are executed

Department	Major Command Code	Total Actions	Total Dollars	Large Business Actions	Large Business Dollars	Small Business Actions	Small Business Dollars	Total Education Actions	HBCU (Historica Black College Universi Actions
DEPT OF DEFENSE (9700)	AMC	135,574	$56,319,431,733.10	65,564	$41,295,305,813.69	64,614	$12,558,025,232.81	855	
Total		135,574	$56,319,431,733.10	65,564	$41,295,305,813.69	64,614	$12,558,025,232.81	855	

For Federal Hierarchy selection we are using "OR" logic. For example if a user selects 2 departments and 1 subtier and once he executes the report then the user will see Subtier data only.

F. Bottom Menu bar contains four functions: Execute, Save, Clear, and PDF Export.
   - Execute - The **Execute** button executes the report using the entered criteria and returns the data in the grid view.
   - Save - The **Save** button will save the report criteria.
   - Clear- **Clear** button will remove any entered values in the criteria.
   - PDF Export - The **PDF Export** button executes the report using the entered criteria and returns a PDF document with the **appendix information** that can be

printed or downloaded. Note that the MicroStartegy PDF icon at the report toolbar only provides the report without the appendix.



DoD Report Data information - This is an informational section and provides information that pertains to all reports.

Appendix - The **Appendix** is different for each report. It provides information on the calculations and exclusions for the report. User can click “**+“ to** open the **Appendix** accordion.

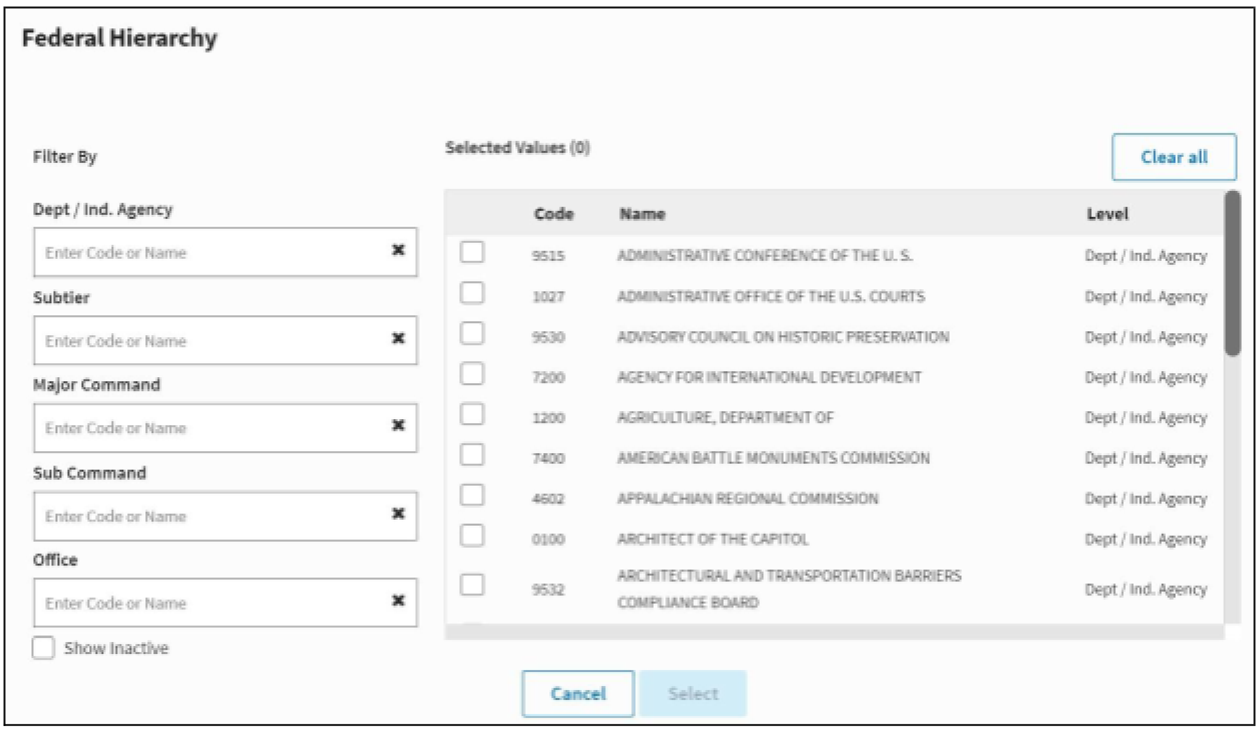
How to execute a Contract Data Administrative report

This section provides instructions for executing one of the Administrative Reports. Same or similar steps apply for other Administrative Reports.

Step-by-Step instruction for execution of **National Interest Action Report**:

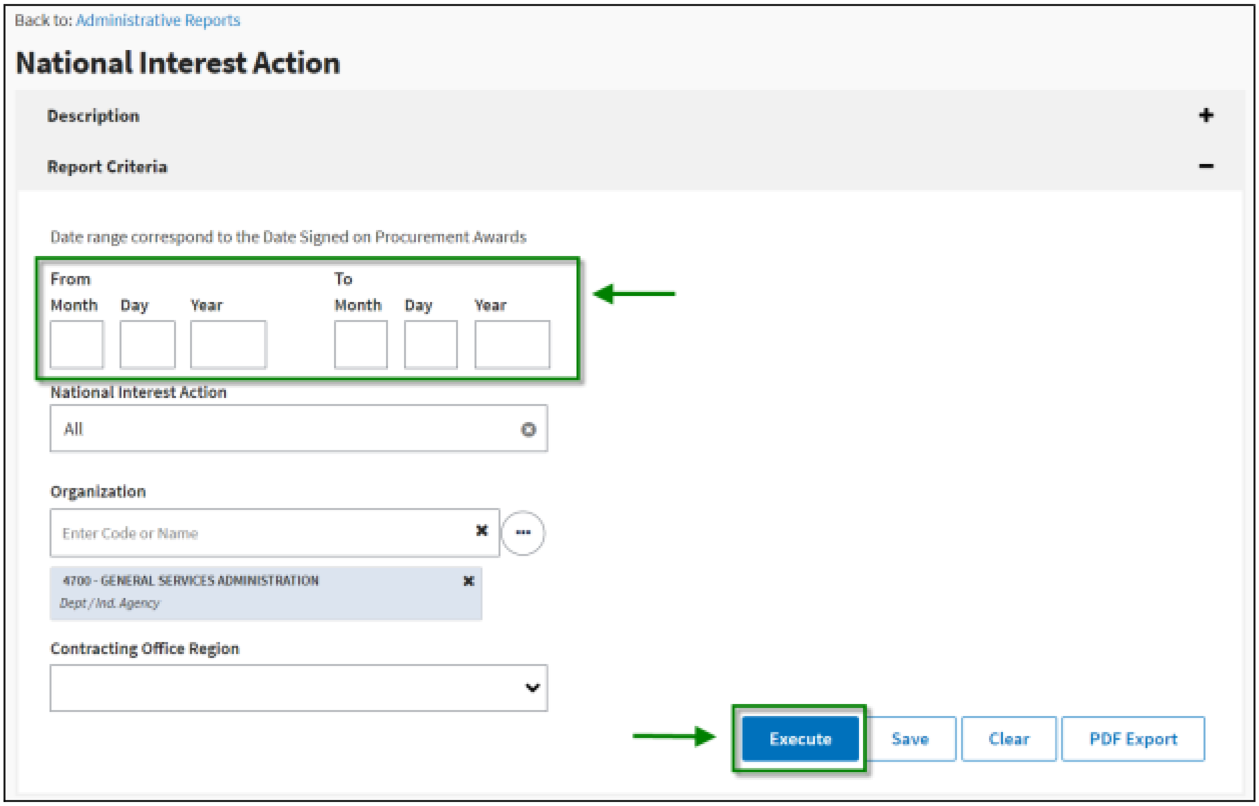
1. From the left navigation bar, click on **Contract data** under *Show Reports For*, then click on **Administrative Report** under Report Type. The Contract Data reports are listed in alphabetical order. Use pagination to find the target report. This guide uses the **National Interest Action Report;** click on it.

2. Enter report criteria:
    - From Date and To Date for Date Signed on the Procurement Awards (MM/DD/YYYY) (Required)
    - For selecting the organization enter code or name, or click on the "…" button to access the Agency selection screen.
    - Additional criteria may vary based on the reports; they are omitted here.



3. Click **Execute** to run the report

    See a screenshot below:



Create a report in PDF format with Appendix at the end

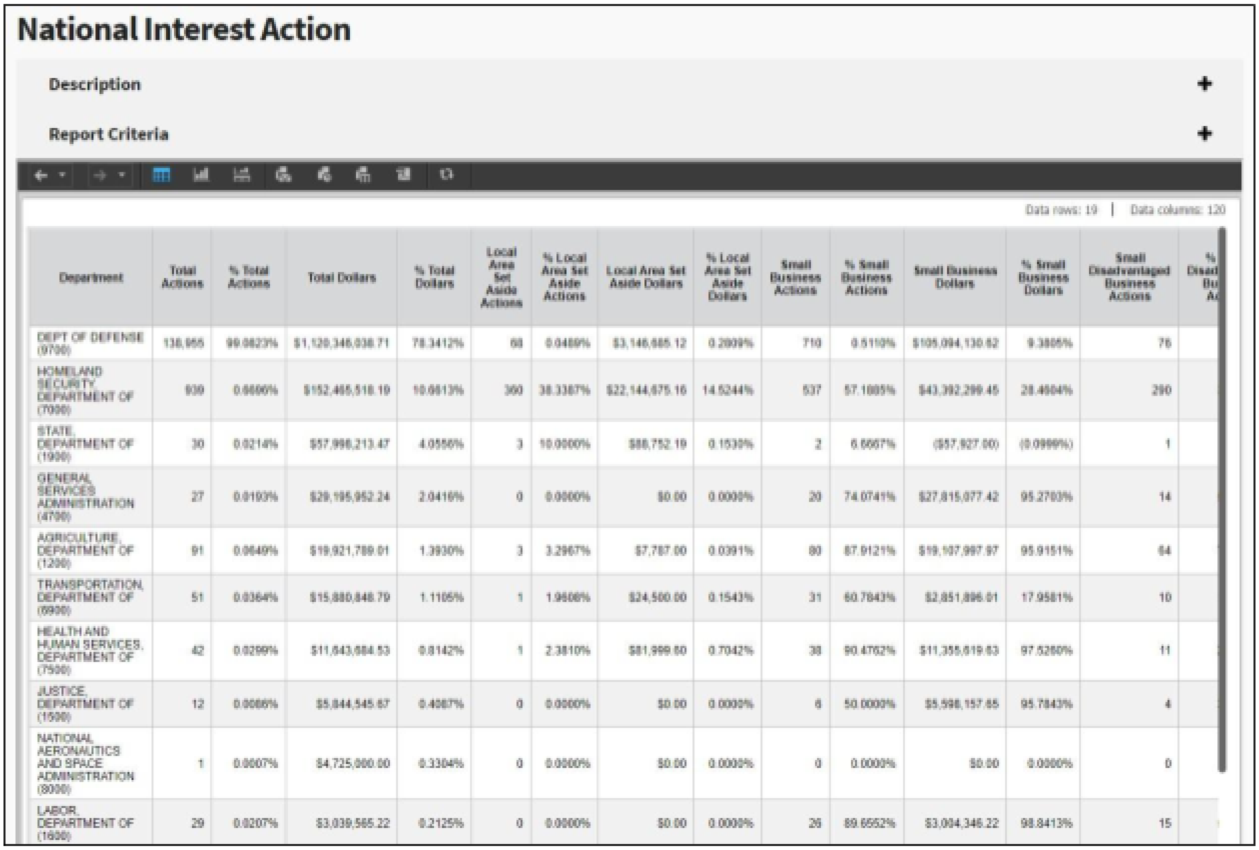
The **PDF Export** button is a customized function to create a report in PDF format with the appendix attached at the end.

This feature is different from the PDF icon in the report toolbar, which can also create a PDF report, but does not attach the appendix. The following are basic tips on **PDF Export** button functionality:

- Export file type is PDF
- Report Description and Criteria are located on the first page of the PDF
- Appendix information is at the button of the report
- User name along with a date and time stamp are in the footer of each page

The Report Result page

Once the user executes the report, the system displays the results page.

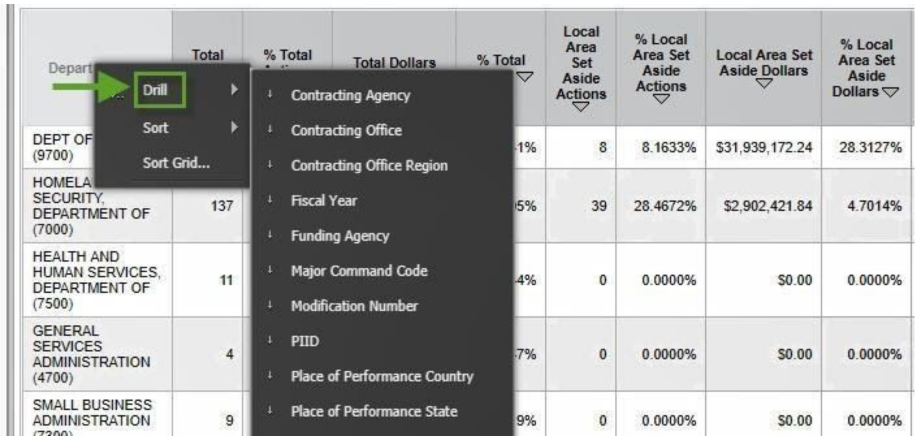


Department	Total Actions	% Total Actions	Total Dollars	% Total Dollars	Local Area Set Aside Actions	% Local Area Set Aside Actions	Local Area Set Aside Dollars	% Local Area Set Aside Dollars	Small Business Actions	% Small Business Actions	Small Business Dollars	% Small Business Dollars	Small Disadvantaged Business Actions
DEPT OF DEFENSE (9700)	138,955	99.0823%	$1,120,346,038.71	78.3412%	68	0.0489%	$3,146,685.12	0.2809%	710	0.5110%	$105,094,130.62	9.3805%	76
HOMELAND SECURITY, DEPARTMENT OF (7000)	939	0.6696%	$152,465,518.19	10.6613%	360	38.3387%	$22,144,675.16	14.5244%	537	57.1885%	$43,392,299.45	28.4604%	290
STATE, DEPARTMENT OF (1900)	30	0.0214%	$57,998,213.47	4.0556%	3	10.0000%	$88,752.19	0.1530%	2	6.6667%	($57,927.00)	(0.0999%)	1
GENERAL SERVICES ADMINISTRATION (4700)	27	0.0193%	$29,195,952.24	2.0416%	0	0.0000%	$0.00	0.0000%	20	74.0741%	$27,815,077.42	95.2703%	14
AGRICULTURE, DEPARTMENT OF (1200)	91	0.0649%	$19,921,789.01	1.3930%	3	3.2967%	$7,787.00	0.0391%	80	87.9121%	$19,107,997.97	95.9151%	64
TRANSPORTATION, DEPARTMENT OF (6900)	51	0.0364%	$15,880,848.79	1.1105%	1	1.9608%	$24,500.00	0.1543%	31	60.7843%	$2,851,896.01	17.9581%	10
HEALTH AND HUMAN SERVICES, DEPARTMENT OF (7500)	42	0.0299%	$11,643,684.53	0.8142%	1	2.3810%	$81,999.60	0.7042%	38	90.4762%	$11,355,619.63	97.5260%	11
JUSTICE, DEPARTMENT OF (1500)	12	0.0086%	$5,844,545.67	0.4087%	0	0.0000%	$0.00	0.0000%	6	50.0000%	$5,598,157.65	95.7843%	4
NATIONAL AERONAUTICS AND SPACE ADMINISTRATION (8000)	1	0.0007%	$4,725,000.00	0.3304%	0	0.0000%	$0.00	0.0000%	0	0.0000%	$0.00	0.0000%	0
LABOR, DEPARTMENT OF (1600)	29	0.0207%	$3,039,565.22	0.2125%	0	0.0000%	$0.00	0.0000%	26	89.6552%	$3,004,346.22	98.8413%	15

Report Drill, Sort, and Sort Grid Functions

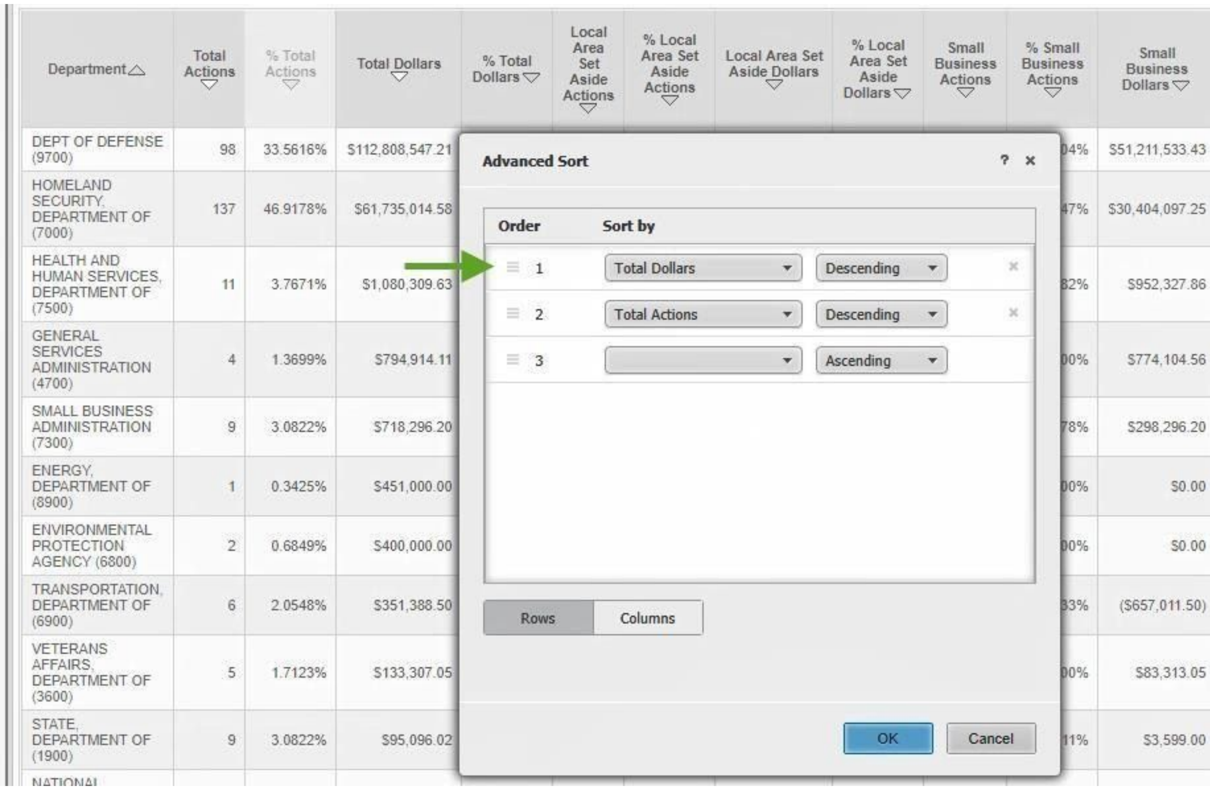
User can perform Drill, Sort, and Sort Grid functions within the report results. Right click on the report column header to access these functions.

1. **Drill -** Add an attribute element (insert one column at a time) or user can run a workflow, with a slightly different prefix icon from the attribute, from the "Drill" option.
   Note: Users cannot drill down on calculations / metrics.



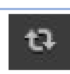
2. **Sort** - Change the sort order of the selected header column (ascending or descending). Sort options are only available when a column header is chosen.

3. **Sort Grid** - Use the "Sort Grid" option to define order of columns in the report, and sorting type per column. Drag and drop columns to re-order them.


Department
Total Actions
% Total Actions
Total Dollars
% Total Dollars
Local Area Set Aside Actions
% Local Area Set Aside Actions
Local Area Set Aside Dollars
% Local Area Set Aside Dollars
Small Business Actions
% Small Business Actions
Small Business Dollars
DEPT OF DEFENSE (9700) 98 33.5616% $112,808,547.21 $51,211,533.43
HOMELAND SECURITY, DEPARTMENT OF (7000) 137 46.9178% $61,735,014.58 $30,404,097.25
HEALTH AND HUMAN SERVICES, DEPARTMENT OF (7500) 11 3.7671% $1,080,309.63 $952,327.86
GENERAL SERVICES ADMINISTRATION (4700) 4 1.3699% $794,914.11 $774,104.56
SMALL BUSINESS ADMINISTRATION (7300) 9 3.0822% $718,296.20 $298,296.20
ENERGY, DEPARTMENT OF (8900) 1 0.3425% $451,000.00 $0.00
ENVIRONMENTAL PROTECTION AGENCY (6800) 2 0.6849% $400,000.00 $0.00
TRANSPORTATION, DEPARTMENT OF (6900) 6 2.0548% $351,388.50 ($657,011.50)
VETERANS AFFAIRS, DEPARTMENT OF (3600) 5 1.7123% $133,307.05 $83,313.05
STATE, DEPARTMENT OF (1900) 9 3.0822% $95,096.02 $3,599.00
Advanced Sort
Order
Sort by
1 Total Dollars Descending
2 Total Actions Descending
3 Ascending
Rows
Columns
OK
Cancel

Report Toolbar

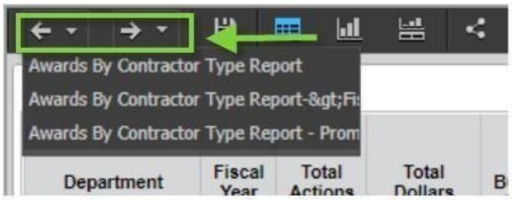
The following icons are available in the toolbar of a report executed:

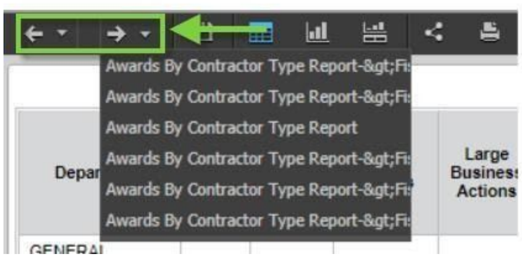
Name	Icon	Description
Back (previous)		Returns user to previous summary report or other executed reports. Click the down arrow to bring up the past 10 items executed.
Forward		Moves user forward to the previously executed reports such as a drill down report or a workflow report. Click the forward arrow to bring up to 10 previous items.
Grid		Displays the report as a grid, similar to a standard spreadsheet style.
Graph		Displays the report as a graph. MicroStrategy can display data in numerous graph types and styles.
Grid and Graph		Displays the report in both grid and graph views at the same time on the screen.
Print		Allows user to specify print settings for the report and print the report.
Send Now		Allows user to email executed report detail or/and report link to specified email addresses.
Schedule Delivery to History List		Opens the Subscribe to History List dialog box for a user to set up automatic delivery of a report/document to your History List / My Subscription on a specific schedule. Users will see this icon only when they have this privilege.
Export		Exports all (or a portion) of the report in Excel, CSV, HTML, or plain text format. Does not include the report appendix information.
PDF		Allows user specify settings to convert and display reports in PDF format. The summary appendix information does not show using this toolbar option. Please use the **PDF Export** button in the Report Criteria Accordion if appendix is needed.
Refresh		Refreshes the current display.

Back and Forward Arrows

The **Back** and **Forward Arrows** in the toolbar allow the user to view previous executed report(s). When the report is initially executed, these arrows are disabled. As you start using Drill, Sort, and Sort Grid functions, previous report versions of the report will become available in the dropdown lists by the arrows.

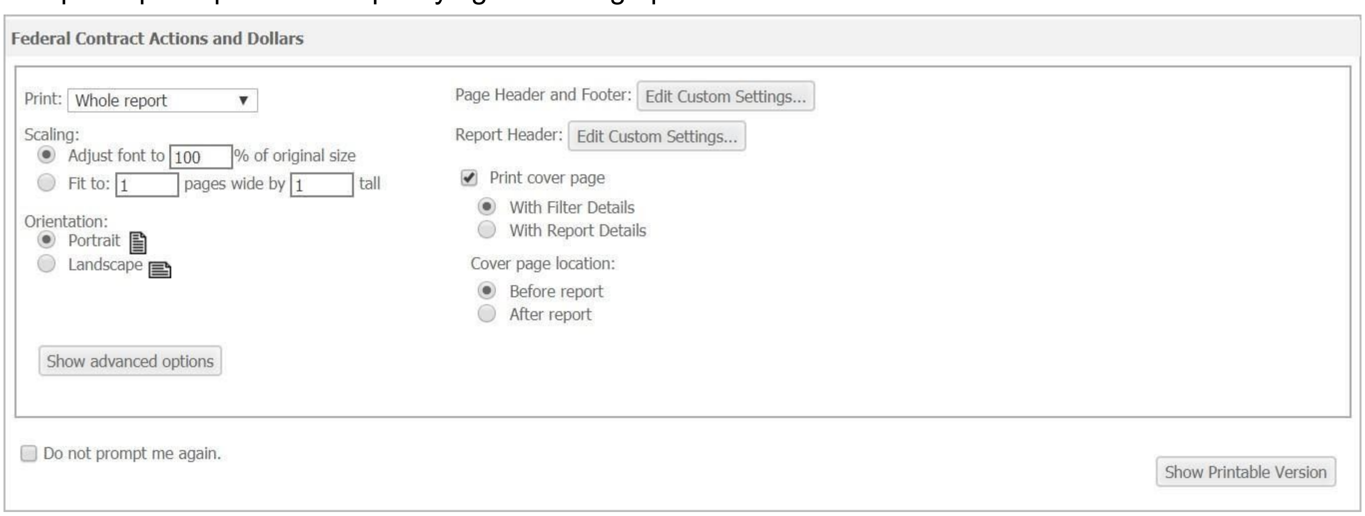
Note: Up to 10 previous report versions are available in both the **Back** and **Forward Arrow** icon drop down list at a time.





Print Report

The **Print** functionality allows a user to print and / or download a report by choosing from multiple export options and specifying formatting options.



The following information provides steps to using the **Print** functionality:

1. Select the **Print Icon** from the Toolbar.
2. **Choose one** of the two options for what to export:
    a. **Whole Report** – all results will be exported up to 150k rows.

   b. **Portion displayed only** – Use this option to export the rows that are currently displayed in the grid.
3. In the **Scaling** area, specify how the content will adjust to the printed page. Select one of the following options:
   a. To specify the font size of text displayed on a report as a percentage of its original size, select the **Adjust font to % of original size** option, then type a percentage in the field. The default is 100%.
   b. To specify the page dimensions in which to fit the report contents, select the **Fit to page(s) wide by tall** option, then type a number in the fields. The default is 1 page wide by 1 page tall.
4. If you have a graph displayed in the results, the option to choose the graph location is displayed. If no graph is in the results, this option is not displayed when selecting the Export button.
   a. Select the checkbox for **Print the grid and graph on the same page** if you do not want to have them on separate pages.
5. In the **Orientation** area, select **Portrait** to export the report in a vertical format. Select **Landscape** if you want the report to print horizontally.
6. To include a page header and footer on the report, click **Edit Custom Settings** next to **Page Header and Footer** to open the Header/Footer Editor. You can place text in the left, center, and right portions of the page's header and footer.
7. To specify the text to display in the report header, click **Edit Custom Settings** next to **Report Header** to open the Report Header Editor. You can type specific text, or use the **Insert Auto-text** drop-down list at the top of the page to select and insert auto-text.
8. You can choose to include a cover page for the report.
   a. To specify whether the cover page is placed before or after the report, select **Before report** or **After report**.
9. To adjust settings such as paper size, margins, and maximum header and footer sizes, click **Show Advanced Options button** to open the additional options.
   a. From the **Paper size** drop-down list, select the paper size to use to export the report. The default is Letter 8.5" x 11".
   b. Type the margins you want to use in the report in the **Margins (Inches)** fields. Set the left, right, top, and bottom margins. For reports to print correctly, these margin settings and the margin settings in the browser's File > Page Setup option must match. The default value for each margin is 0.75 inches.
   c. In the **Maximum header size (Inches)** field, type the size at which the report header can be overwritten. If the header is larger than its maximum size and the report must use the space to display its content, the header will be cut off by the report content. If the report does not use the space, the entire header is displayed, regardless of size. The default header size is 5.0 inches.
   d. In the **Maximum footer size (Inches)** field, type the size at which the report footer can be overwritten. If the footer is larger than its maximum size and the report must use the space to display its content, the footer will be cut off by the report content. If the report does not use the space, the entire footer is displayed, regardless of size. The default footer size is 5.0 inches.
10. To use the predetermined fonts for the report, select the **Embed fonts** check box.
11. **Select "Do not prompt me again" checkbox** if you do not want to answer these settings in the future when printing a report. **(Not recommended)**

12. Click **Show Printable Version**. The report, using your selected settings, is opened in another browser tab.
13. You can **Download or Print** your report by selecting the appropriate button from the menu.

Send Now (Emailing)

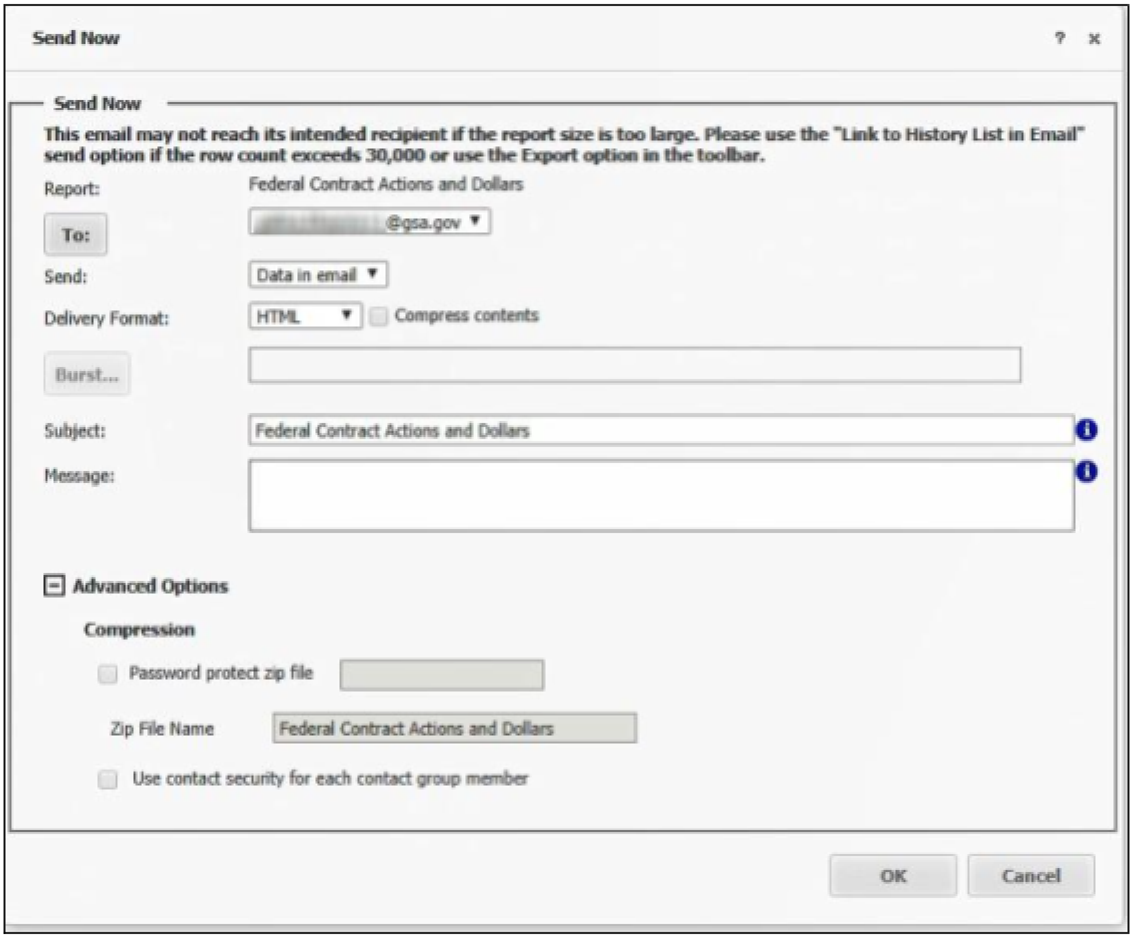
The Send Now functionality allows users to send the data and / or link of the report they have executed by choosing from multiple delivery options and multiple formats.

Note: If report results are large, the Send Now function is not the best option for providing results to others. Please consider using the Export option in the toolbar. See the **Export** Reference in this document.

The following information provides steps to using the Send Now (Email) functionality:

1. **Select the Send Now** icon in the Toolbar.
2. Select the To button to select the email(s) from the available registered users or personal email list to send the report to. When you open this form for the first time you will only see your email listed. Users can add recipients which will be saved and available for selection in the future.
3. **Single click recipient name(s)** from the Available list and **click the appropriate box (To, Cc, Bcc) arrow** to select the email address to send the report to.
4. Once done selecting recipients, **select the OK** button to close the pop up box.
5. **Click anywhere in the Send field** to display the options of what will be sent to the recipients.
6. **Single click** an option in the available drop down list to select that method.
    a. Data in email: The report results will appear in the email body.
    b. Data in email and to history list: The report results are in the email and the report will be in your user history list.
    c. Data and link to history list in email: The report results and a link to open the report list will appear in the email.
    d. Link to history list in email: A link will be in the sent email to open the executed report.

    Note: Link to history list and adding data to history list is a snapshot of the data at this time. It does not refresh.
7. **Click anywhere in the Delivery Format field** to display the format options for the data being sent.
    Single click an option in the drop down list to select that format.

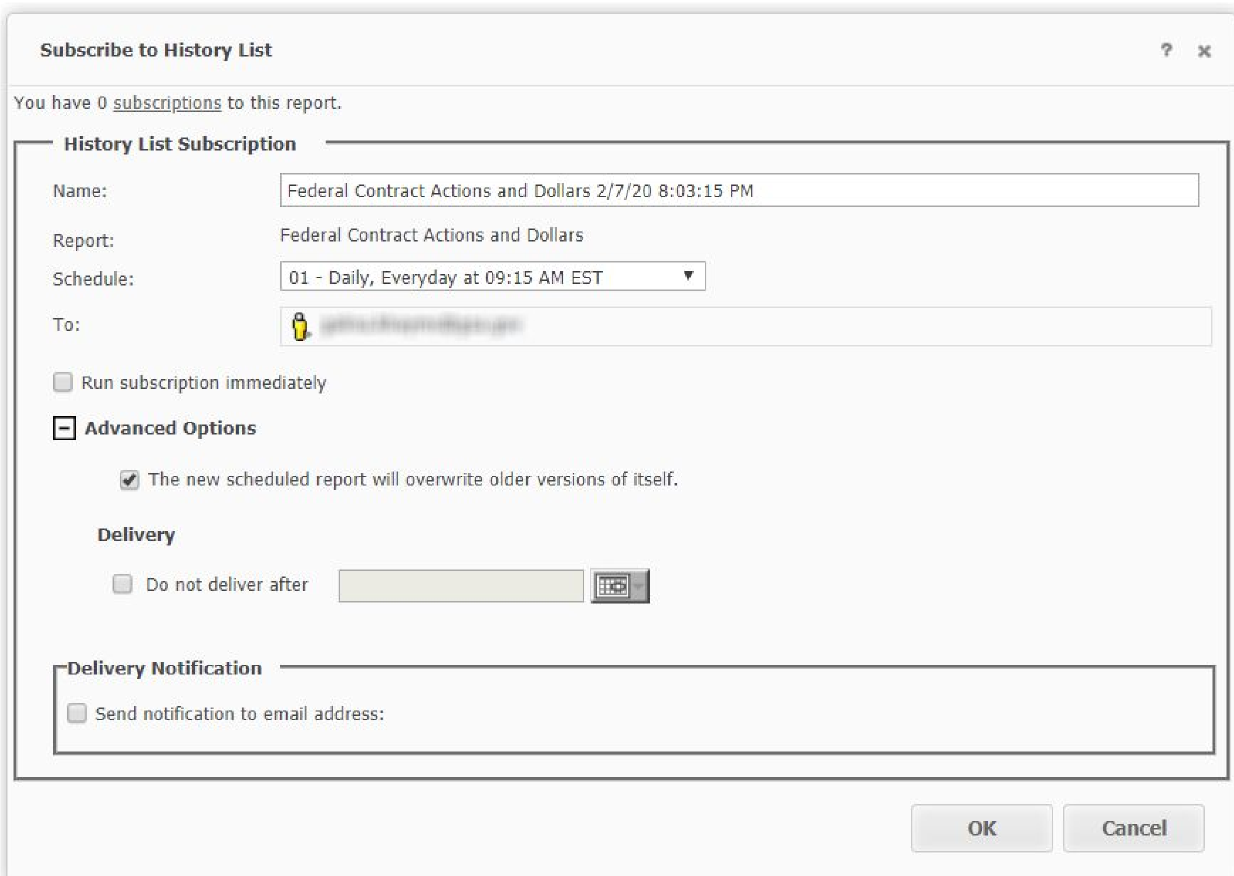


8. Update the name for the zip file. (Optional)

9. Update the Subject line. (Optional)
10. Enter a message. (Optional)
11. If the report is large and you are sending the actual data, Compression and Password protection are available options.
    a. **Click** the **Compress contents box** to the left of the Delivery Format to compress the data.
    b. **Click the +** to expand the Advanced Options area.
        i. **Click Password protect zip file** check box and enter password

12. **Select the OK** button to send the email.
13. A confirmation message will appear under the toolbar and above the grid - it will disappear quickly.

Schedule Delivery (subscribe) to History List



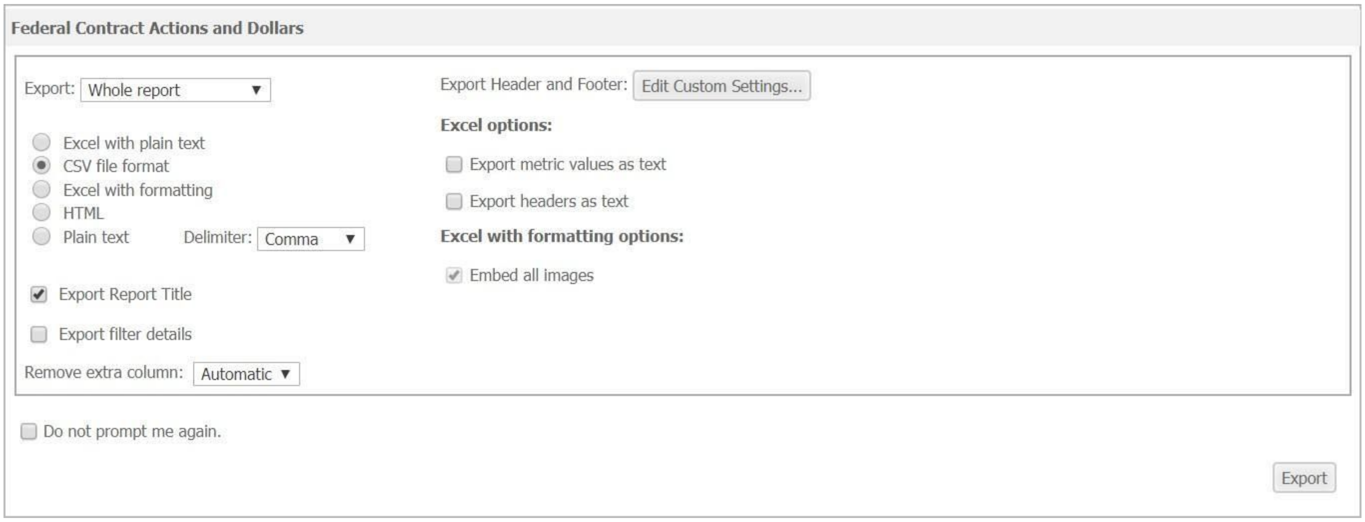
Follow these steps to use the Schedule Delivery functionality:

1. Enter the name of the report
2. Select the desired schedule from dropdown, for example: Daily, Weekly, etc.
3. User has an option to run subscription immediately
4. Check the box for “Send notification to email address” and then click ok.
5. If user would like to cancel the subscription, click the Cancel button.

6. Advanced options allow users to specify end date for the subscription. If the end date is not specified, the scheduled reports will be delivered until the subscription is canceled or an end date is added.

Export

The Export functionality allows a user to send the report results by choosing from multiple export options and multiple formats.

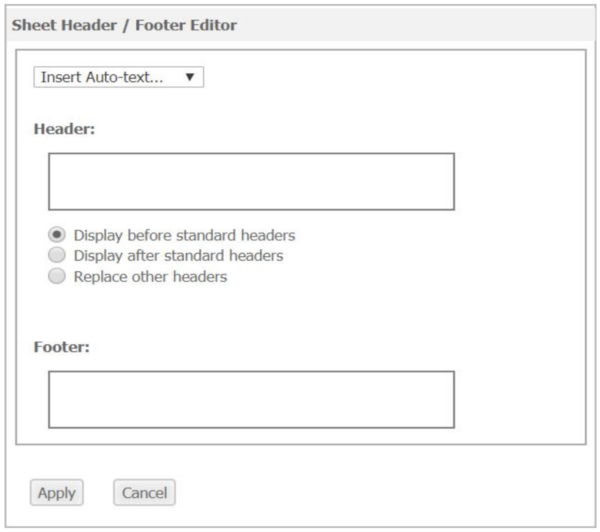


Follow these steps to use the Export functionality:

1. Select the **Export** icon from the Toolbar.
2. **Choose one** of the two options for what to export:
    a. **Whole Report** – all returned rows will be exported.
    b. **Portion displayed only** – Use this option to export the rows that are currently displayed in the grid.
3. **Choose one** of the formats to export the report results:
    a. **Excel with plain text:** The report is exported and displayed as a Microsoft Excel spreadsheet, which contains only the text of the grid report. The spreadsheet does not retain the formatting of the report as displayed in beta.SAM.gov Portal.
        i. Excel options:
            1. **Export metric values as text:** Determine whether numeric values should be exported as text or as numbers. If you choose to export metric values as numbers, Excel may automatically format the number. For example, $34.23614 may be rounded to $34.24 in Excel. If you choose to export metric values as text, Excel will not automatically format the numbers. This setting only applies to exports to Excel. This check box is cleared by default.
            2. **Export headers as text:** Determine whether header values should be exported as text or in their current format, which could be numeric, date, and so on. This setting only applies to exports to Excel. This check box is cleared by default.
    b. **CSV file format:** The report is exported as a CSV file. The contents of the grid report are displayed, separated by commas. (Default option)
    c. **Excel with formatting:** The report is exported and displayed as a Microsoft Excel spreadsheet. The spreadsheet retains the formatting of the report as displayed in beta.SAM.gov Portal, such as colors, fonts, and structure.
        i. Excel with Formatting Option**:**

            1. **Embed all images:** Determine whether exported graphs and images from the report are included in the Excel spreadsheet as images. If this check box is selected, the images and graphs can be accessed from the spreadsheet. This check box is selected by default.
    d. **HTML:** The grid report is exported to an HTML file.
    e. **Plain text:** The contents of the grid report are exported to plain text, and the **Delimiter** you specify separates data from each cell of the report.
        i. **Choose one** of the five (5) available options for the delimiter:
            1. Comma (Default option)
            2. Tab
            3. Semicolon
            4. Space
            5. Tilde
    f. **Note:** Only the Excel with formatting and HTML options are available when exporting both the grid and the graph.
4. **Select "Export Report Title"** to see the title on the exported report.
5. **Select "Export filter details**" to see the Report Criteria that you entered for the report. If you chose to export them, they appear above the exported report. (Optional)
6. **Select** the option to use for **"Remove extra column:"** Determine whether or not the column that displays the word "**Metrics**" is displayed on the exported report.
   What Metrics are - Metrics are the calculations performed on data, the results of which are displayed on a report. Metrics are similar to formulas in spreadsheet software. The Metrics column is designed to distinguish a metric (calculated field) from an attribute.
    a. **Yes:** The word "Metrics" is removed and not displayed.
    b. **No:** The word "Metrics" is not removed and is displayed.
    c. **Automatic (default):** The report-level setting for the feature is applied. beta.SAM.gov report-level setting is Yes – the word "Metrics" is not displayed.

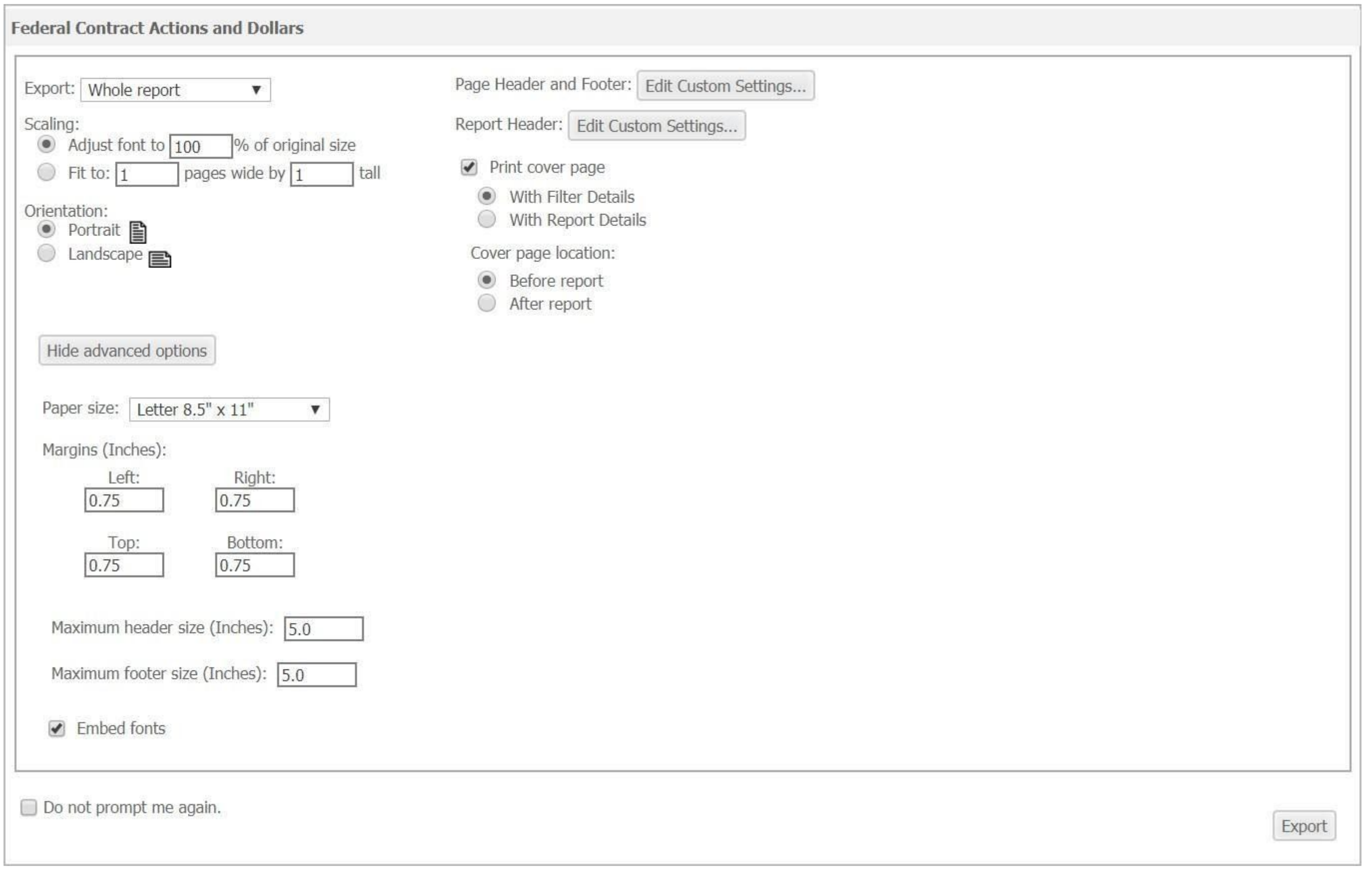
7. **Select Edit Custom Settings** to specify Header and Footer details. Type text in the Header and Footer fields, or select auto-text to insert from the Insert Auto-text drop-down list.



8. **Select "Do not prompt me again"** checkbox if you do not want to answer these settings in the future when exporting a report. **(Not recommended)**
9. **Select Export** button to export your report with the values selected.
10. Export will be available in your download folder.

PDF Export

The PDF export functionality allows an authenticated user the ability to download a PDF version of a report by choosing from multiple export options and specifying formatting options.
Note: If you want the appendix information for the report, please use the PDF Export button located in the Report Criteria section of the Portal.



Follow these steps to use the PDF export functionality:

1. Select the **PDF Icon** from the Toolbar.
2. **Choose one** of the two options for what to export:
    a. **Whole Report** – all returned rows will be exported.
    b. **Portion displayed only** – Use this option to export the rows that are currently displayed in the grid.
3. In the **Scaling** area, specify how the content is adjusted to the PDF page. Select one of the following options:
    a. To specify the font size of text displayed on a report as a percentage of its original size, select the **Adjust font to % of original size** option, then type a percentage in the field. The default is 100%.
    b. To specify the page dimensions in which to fit the report contents, select the **Fit to page(s) wide by tall** option, then type a number in the fields. The default is 1 page wide by 1 page tall.
4. If you have a graph displayed in the results, the option to choose the graph location is displayed, if no graph is in the results this option is not displayed when selecting the Export button.

   a. Select **Print the grid and graph on the same page** if you do not want to have them on separate pages.
5. In the **Orientation** area, select **Portrait** to export the report in a vertical format. Select **Landscape** if you want the report to print horizontally.
6. To specify the page header and footer to be displayed on the report, click **Edit Custom Settings** next to **Page Header and Footer** to open the Header/Footer Editor. You can specify the text to place in the left, center, and right portions of the page's header and footer. Type static text, or use the **Insert Auto-text** drop-down list at the top of the page to select and insert auto-text.
7. To specify the text to display in the report header, click **Edit Custom Settings** next to **Report Header** to open the Report Header Editor. You can type static text in the **Header** field, or use the **Insert Auto-text** drop-down list at the top of the page to select and insert auto-text.
8. You can choose to include a cover page for the report by selecting **Print cover page** checkbox.
   a. Select whether the cover page will include **Filter Details** or **Report Details**.
   b. To specify whether the cover page is placed before or after the report, select **Before report** or **After report**.
9. To adjust settings such as paper size, margins, and maximum header and footer sizes, click **Show Advanced Options button** to open the additional options.
   a. From the **Paper size** drop-down list, select the paper size to use to export the report. The default is Letter 8.5" x 11".
   b. Type the margins you want to use in the report in the **Margins (Inches)** fields. Set the left, right, top, and bottom margins. For reports to print correctly, these margin settings and the margin settings in the browser's File > Page Setup option must match. The default value for each margin is 0.75 inches.
   c. In the **Maximum header size (Inches)** field, type the size at which the report header can be overwritten. If the header is larger than its maximum size and the report must use the space to display its content, the header will be cut off by the report content. If the report does not use the space, the entire header is displayed, regardless of size. The default header size is 0.5 inches.
   d. In the **Maximum footer size (Inches)** field, type the size at which the report footer can be overwritten. If the footer is larger than its maximum size and the report must use the space to display its content, the footer will be cut off by the report content. If the report does not use the space, the entire footer is displayed, regardless of size. The default footer size is .5 inches.
10. To use the predetermined fonts for the export file, select the **Embed fonts** check box.
11. Select **"Do not prompt me again"** checkbox if you do not want to answer these settings in the future when PDF exporting a report. **(Not recommended)**
12. Click **Export**. The report is exported in the selected form

Data Refresh:

- Admin reports data are updated before 8 AM EST daily. In case there is a delay, you shall see a banner message to notify you on this modernized system home page.
- The Exception are for the reports of:
  - (1) Audit Procedures
  - (2) Status of Action

  which are using live data from the Transactional Database

Appendix A - List of Contact Data Administrative Reports

- Audit Procedures Report – Using live Data
- Individual Data Item Oversight Tracker Report
- National Interest Action Report
- Rerepresentation Eligible Actions Report
- Rerepresentation Report
- Status of Actions Report - Using live data
- Transfer Action Report
- Workload Report