User Reference Guide

Part 1: Data Bank Contract Data (FPDS)

Standard Reports

(Revision 1.2)
## Revision History

<table>
<thead>
<tr>
<th>Revised on</th>
<th>Version</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/07/2020</td>
<td>0.1</td>
<td>Baseline</td>
</tr>
<tr>
<td>02/28/2020</td>
<td>0.2</td>
<td>Update for favorites functionality</td>
</tr>
<tr>
<td>3/11/2020</td>
<td>1.0</td>
<td>Release version</td>
</tr>
<tr>
<td>08/5/2020</td>
<td>1.1</td>
<td>Multiple PIID; Maximum Organization selection from 10 to 20</td>
</tr>
<tr>
<td>10/22/2020</td>
<td>1.2</td>
<td>Data Refresh</td>
</tr>
</tbody>
</table>
Overview

The purpose of this document is to provide guidance on the Contract Data (FPDS) Standard 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. Admin 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.
Note: The menus, options, and icons available to each user may vary, depending on the assigned user role and privileges.

About Standard Reports

There are currently 34 standard reports for Contract Data represented in the Data Bank section. Standard reports contain information about contract activity formatted to meet the needs of both government and public users on a regular basis. These reports are listed alphabetically. The data in standard reports is presented in summary form and its workflow report(s). A person accessing standard reports can filter and sort the data to locate information of particular interest. The usage examples refer to one specific report, noted on page 7. These steps are useful for becoming familiar with, and navigating through each of the standard reports. The list of the standard reports is included in Appendix A.

Registration: Users must register (sign up) in order to access the Contract Data (FPDS) Standard reports.

Role & Privilege: The registered users do not need a role to access basic standard report capabilities. All civilian or public users can access these reports.

Government users are encouraged to register an account with their government issued email address with associated department and agency information to access to the additional data that is restricted, such as data for DoD users only. The roles for the Contract Data (legacy FPDS) domain are the Contracting Specialist, the Contracting Officer, and the Administrator.

- The Contract Specialist and Contracting Officer roles can access the standard reports, but must be granted specific permission to use the “scheduling” functionality.
- The Administrator role has access to the standard reports and the “scheduling” functionality. They can also grant the “scheduling” to a lower role.

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

Data Access: Data access is controlled based on your profile information such as Department/Agency. Non-DoD users are subject to a 90-day delay for the DoD funded awards.

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, Potential Vendor Anomaly Report can include only 12 months of data at a time. After the 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.

Scheduling: The functionality allows users to schedule reports and the schedules can be found from My Scheduled Reports folder.
Accessing Standard 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.
5. 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

The Data Bank home page serves as a landing page for the Standard Reports.

Key elements of the Data Bank Home page:

A. All available Domains are located at the left navigation bar on the page.
B. Report List page navigation. Ten (10) reports are displayed per page in alphabetical order.
C. Indicates how many reports are available.
D. Saved Criteria will show any specified criteria that a user has previously saved for each report.
E. Subscriptions and History List toggle. This menu is available only to users who have permissions to subscribe to reports.

For more information about the IAE, contact us at iaeoutreach@gsa.gov
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 Standard Reports** takes the user back to the home page of Standard 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. **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. This 20 orgs is applicable to the FH office report also.
Example:

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

<table>
<thead>
<tr>
<th>Department</th>
<th>Total Actions</th>
<th>Total Dollars</th>
<th>Large Business Actions</th>
<th>Large Business Dollars</th>
<th>Small Business Actions</th>
<th>Small Business Dollars</th>
<th>Total Education Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEPT OF DEFENSE (9700)</td>
<td>56,867,924</td>
<td>$350,259,424,074.31</td>
<td>57,117,255</td>
<td>$270,712,825,426.35</td>
<td>1,656,871</td>
<td>$69,685,013,580.77</td>
<td>7,392</td>
</tr>
<tr>
<td>GENERAL SERVICES ADMINISTRATION (4700)</td>
<td>1,316,936</td>
<td>$15,461,144,939.65</td>
<td>277,915</td>
<td>$10,665,243,793.57</td>
<td>723,237</td>
<td>$4,162,639,512.56</td>
<td>371</td>
</tr>
<tr>
<td>INTERIOR, DEPARTMENT OF THE (1400)</td>
<td>50,077</td>
<td>$3,738,561,160.63</td>
<td>13,809</td>
<td>$1,539,489,816.25</td>
<td>33,150</td>
<td>$2,033,894,093.16</td>
<td>472</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>60,234,937</strong></td>
<td><strong>$399,469,130,174.59</strong></td>
<td><strong>57,408,979</strong></td>
<td><strong>$282,907,559,036.17</strong></td>
<td><strong>2,413,268</strong></td>
<td><strong>$75,881,547,186.49</strong></td>
<td><strong>8,235</strong></td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Department</th>
<th>Contracting Agency ID</th>
<th>Total Actions</th>
<th>Total Dollars</th>
<th>Large Business Actions</th>
<th>Large Business Dollars</th>
<th>Small Business Actions</th>
<th>Small Business Dollars</th>
<th>Total Education Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEPT OF DEFENSE (9700)</td>
<td>5700</td>
<td>93,172</td>
<td>$65,471,731,377.22</td>
<td>40,021</td>
<td>$49,510,070,639.10</td>
<td>49,042</td>
<td>$12,300,254,000.87</td>
<td>1,479</td>
</tr>
<tr>
<td>GENERAL SERVICES ADMINISTRATION (4700)</td>
<td>4732</td>
<td>1,288,094</td>
<td>$12,340,416,060.32</td>
<td>271,569</td>
<td>$9,439,650,571.19</td>
<td>702,705</td>
<td>$2,544,472,937.75</td>
<td>316</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,381,266</strong></td>
<td><strong>$77,812,148,357.54</strong></td>
<td><strong>311,590</strong></td>
<td><strong>$59,055,721,210.29</strong></td>
<td><strong>751,747</strong></td>
<td><strong>$14,850,726,944.62</strong></td>
<td><strong>1,795</strong></td>
<td></td>
</tr>
</tbody>
</table>

**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

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

### Federal Hierarchy

**Filter By**

- **Dept / Ind. Agency**
  - Enter Code or Name
- **Subtiers**
  - Enter Code or Name
- **Major Command**
  - Enter Code or Name
- **Sub Command**
  - Enter Code or Name
- **Office**
  - Enter Code or Name

**Selected Values (0)**

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>9515</td>
<td>ADMINISTRATIVE CONFERENCE OF THE U. S.</td>
<td>Dept / Ind. Agency</td>
</tr>
<tr>
<td>1027</td>
<td>ADMINISTRATIVE OFFICE OF THE U.S. COURTS</td>
<td>Dept / Ind. Agency</td>
</tr>
<tr>
<td>9530</td>
<td>ADVISORY COUNCIL ON HISTORIC PRESERVATION</td>
<td>Dept / Ind. Agency</td>
</tr>
<tr>
<td>7200</td>
<td>AGENCY FOR INTERNATIONAL DEVELOPMENT</td>
<td>Dept / Ind. Agency</td>
</tr>
<tr>
<td>1200</td>
<td>AGRICULTURE, DEPARTMENT OF</td>
<td>Dept / Ind. Agency</td>
</tr>
<tr>
<td>7400</td>
<td>AMERICAN BATTLE MONUMENTS COMMISSION</td>
<td>Dept / Ind. Agency</td>
</tr>
<tr>
<td>4602</td>
<td>APPALACHIAN REGIONAL COMMISSION</td>
<td>Dept / Ind. Agency</td>
</tr>
<tr>
<td>0100</td>
<td>ARCHITECT OF THE CAPITOL</td>
<td>Dept / Ind. Agency</td>
</tr>
<tr>
<td>9532</td>
<td>ARCHITECTURAL AND TRANSPORTATION BARRIERS COMPLIANCE BOARD</td>
<td>Dept / Ind. Agency</td>
</tr>
</tbody>
</table>

E. **Bottom Menu bar** is consisting of four functionalities: 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 MicroStrategy 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 standard report**

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

Step-by-Step instruction for execution of Federal Contract Actions and Dollars Report:

1. From the left navigation bar, click on Contract data under Show Reports For, then click on Standard under Report Type. The Contract Data reports are listed in alphabetical order. Use pagination to find the target report. This guide uses the Federal Contract Actions and Dollars Report; click on it.
2. Enter report criteria:
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
Once the user executes the report, the system displays the results page.

**Federal Contract Actions and Dollars Report**

<table>
<thead>
<tr>
<th>Department</th>
<th>Total Actions</th>
<th>Total Dollars</th>
<th>% Total Actions</th>
<th>% Total Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>VETERANS AFFAIRS, DEPARTMENT OF (2900)</td>
<td>247,450</td>
<td>$942,478,327.04</td>
<td>90.54%</td>
<td>92.15%</td>
</tr>
<tr>
<td>DEPT OF DEFENSE (0900)</td>
<td>3,008</td>
<td>$58,676,191.55</td>
<td>1.22%</td>
<td>5.73%</td>
</tr>
<tr>
<td>AGRICULTURE, DEPARTMENT OF (1200)</td>
<td>358</td>
<td>$18,909,347.09</td>
<td>0.13%</td>
<td>1.07%</td>
</tr>
<tr>
<td>INTERIOR DEPARTMENT OF THE (1400)</td>
<td>17</td>
<td>$2,975,549.34</td>
<td>0.01%</td>
<td>0.20%</td>
</tr>
<tr>
<td>HEALTH AND HUMAN SERVICES, DEPARTMENT OF (2500)</td>
<td>34</td>
<td>$1,543,038.03</td>
<td>0.01%</td>
<td>0.15%</td>
</tr>
<tr>
<td>COMMERCE, DEPARTMENT OF (1900)</td>
<td>4</td>
<td>$1,682,309.56</td>
<td>0.01%</td>
<td>0.14%</td>
</tr>
<tr>
<td>JUSTICE, DEPARTMENT OF (5000)</td>
<td>67</td>
<td>$1,432,925.96</td>
<td>0.06%</td>
<td>0.14%</td>
</tr>
<tr>
<td>SOCIAL SECURITY ADMINISTRATION (2000)</td>
<td>6</td>
<td>$1,585,388.00</td>
<td>0.01%</td>
<td>0.13%</td>
</tr>
<tr>
<td>GENERAL SERVICES ADMINISTRATION (4000)</td>
<td>8</td>
<td>$991,376.04</td>
<td>0.01%</td>
<td>0.09%</td>
</tr>
<tr>
<td>HOMELAND SECURITY, DEPARTMENT OF (7500)</td>
<td>16</td>
<td>$554,230.55</td>
<td>0.00%</td>
<td>0.05%</td>
</tr>
<tr>
<td>STATE DEPARTMENT OF (8500)</td>
<td>16</td>
<td>$247,964.00</td>
<td>0.00%</td>
<td>0.02%</td>
</tr>
<tr>
<td>TRANSPORTATION, DEPARTMENT OF (8900)</td>
<td>0</td>
<td>$126,091.00</td>
<td>0.00%</td>
<td>0.01%</td>
</tr>
<tr>
<td>OFFICE OF PERSONNEL MANAGEMENT (2400)</td>
<td>1</td>
<td>$135,990.00</td>
<td>0.00%</td>
<td>0.01%</td>
</tr>
<tr>
<td>EXPORT-IMPORT BANK OF THE U.S. (5400)</td>
<td>3</td>
<td>$101,005.75</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>AGENCY FOR INTERNATIONAL DEVELOPMENT (7200)</td>
<td>1</td>
<td>$95,040.00</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>TREASURY DEPARTMENT OF THE (4300)</td>
<td>4</td>
<td>$79,277.50</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>UNITED STATES AGENCY FOR GLOBAL MEDIA, ERR (9564)</td>
<td>9</td>
<td>$26,801.00</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>FEDERAL MEDICARE AND MEDICAID SERVICE (5000)</td>
<td>1</td>
<td>$23,040.00</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>SMITHSONIAN INSTITUTION (1300)</td>
<td>3</td>
<td>$10,309.27</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>ENERGY DEPARTMENT OF (8000)</td>
<td>1</td>
<td>$1,088.82</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>NATIONAL AERONAUTICS AND SPACE ADMINISTRATION (8600)</td>
<td>1</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>ENVIRONMENTAL PROTECTION AGENCY (6300)</td>
<td>3</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>FEDERAL COMMUNICATIONS COMMISSION (2700)</td>
<td>1</td>
<td>$20,023</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>251,997</strong></td>
<td><strong>$1,622,797,020</strong></td>
<td><strong>100.00%</strong></td>
<td><strong>100.00%</strong></td>
</tr>
</tbody>
</table>
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 from the attribute. In the example below “Award Detail” has a different icon indicating a workflow.

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back (previous)</td>
<td>🔄</td>
<td>Returns user to previous summary report or other executed reports. Click the down arrow to bring up the past 10 items executed.</td>
</tr>
<tr>
<td>Forward</td>
<td>🔄</td>
<td>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.</td>
</tr>
<tr>
<td>Grid</td>
<td>📊</td>
<td>Displays the report as a grid, similar to a standard spreadsheet style.</td>
</tr>
<tr>
<td>Graph</td>
<td>📊</td>
<td>Displays the report as a graph. MicroStrategy can display data in numerous graph types and styles.</td>
</tr>
<tr>
<td>Grid and Graph</td>
<td>📊</td>
<td>Displays the report in both grid and graph views at the same time on the screen.</td>
</tr>
<tr>
<td>Print</td>
<td>📜</td>
<td>Allows user to specify print settings for the report and print the report.</td>
</tr>
<tr>
<td>Send Now</td>
<td>📨</td>
<td>Allows user to email executed report detail or/and report link to specified email addresses.</td>
</tr>
<tr>
<td>Schedule Delivery to History List</td>
<td>📊</td>
<td>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 privilege to access this function.</td>
</tr>
<tr>
<td>Export</td>
<td>📜</td>
<td>Exports all (or a portion) of the report in Excel, CSV, HTML, or plain text format. Does not include the report appendix information.</td>
</tr>
<tr>
<td>PDF</td>
<td>📜</td>
<td>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.</td>
</tr>
<tr>
<td>Refresh</td>
<td>🔄</td>
<td>Refreshes the current display.</td>
</tr>
</tbody>
</table>
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.
14. You can enter multiple **PIIDs** in your report and once you run the report you will see the data based on all the PIIDs.

   Note: One PIID should follow with Return and enter another PIID.

---

**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 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.
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 you 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.
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.
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

e. **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.

![Sheet Header / Footer Editor](image)

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.

**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.
**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 format.
Appendix A - List of Contact Data Standard Reports

- Awards by Contractor Type
- Bundled and Consolidated Contracts Report
- Buy American Act Place of Manufacture
- Buying Through Government Acquisition Vehicles
- Competition Report
- Competition Report - OLD
- Competitive Procedures, but one Offer
- Contract Detail
- Contract Termination for Default-Cause
- Contractor Search
- Federal Contact Actions and Dollars
- Funding Report
- Geographical Report by Place of Performance
- Geographical Report by Vendor Location
- IDVs whose Orders are over the Ceiling Amount
- Inherently Governmental Functions Actions and Dollars
- Local Area Set Aside Report
- Orders Placed after IDV's Last Date to Order
- Orders Referencing Incorrect IDV
- Other Transaction Actions and Dollars
- Performance Based Acquisition Report
- Potential Vendor Anomaly
- Procurement History for Market Research
- Purchase Card as Payment Method
- Recycled Content Product Purchasing Data
- Small Business Achievements by Awarding Organization
- Small Business Competitiveness Demonstration Program
- Small Business Goaling Report
- Subcontracting Plan Report
- Sustainability Report
- Total Actions by NAICS Report
- Total Actions by PSC Report
- Trade Agreements Report
- Unique Vendors