



*Contract Data (FPDS)  
Administrative Reports Quick  
Reference Guide*

# **User Reference Guide**

## **Part 1: Data Bank Contract Data (FPDS)**

### **Standard Reports**

**(Revision 1.2)**

## Revision History

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

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## 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](#).

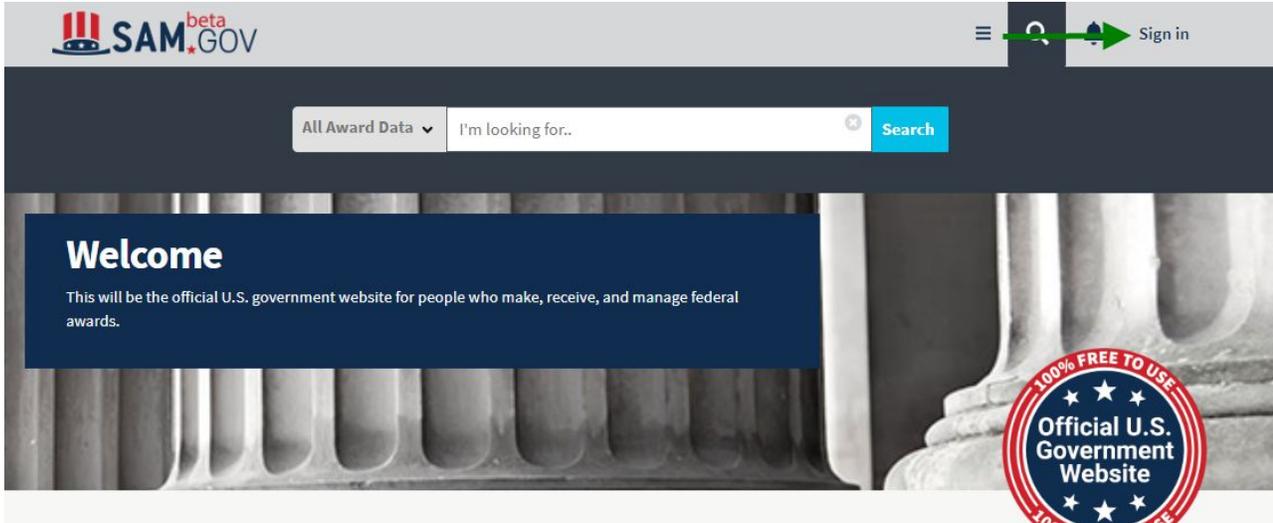
**Data Access:** Data access is controlled based on your profile information such as Department/Agency. Non-DoD users are subject to a 90-day delay for the DoD funded awards.

**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.

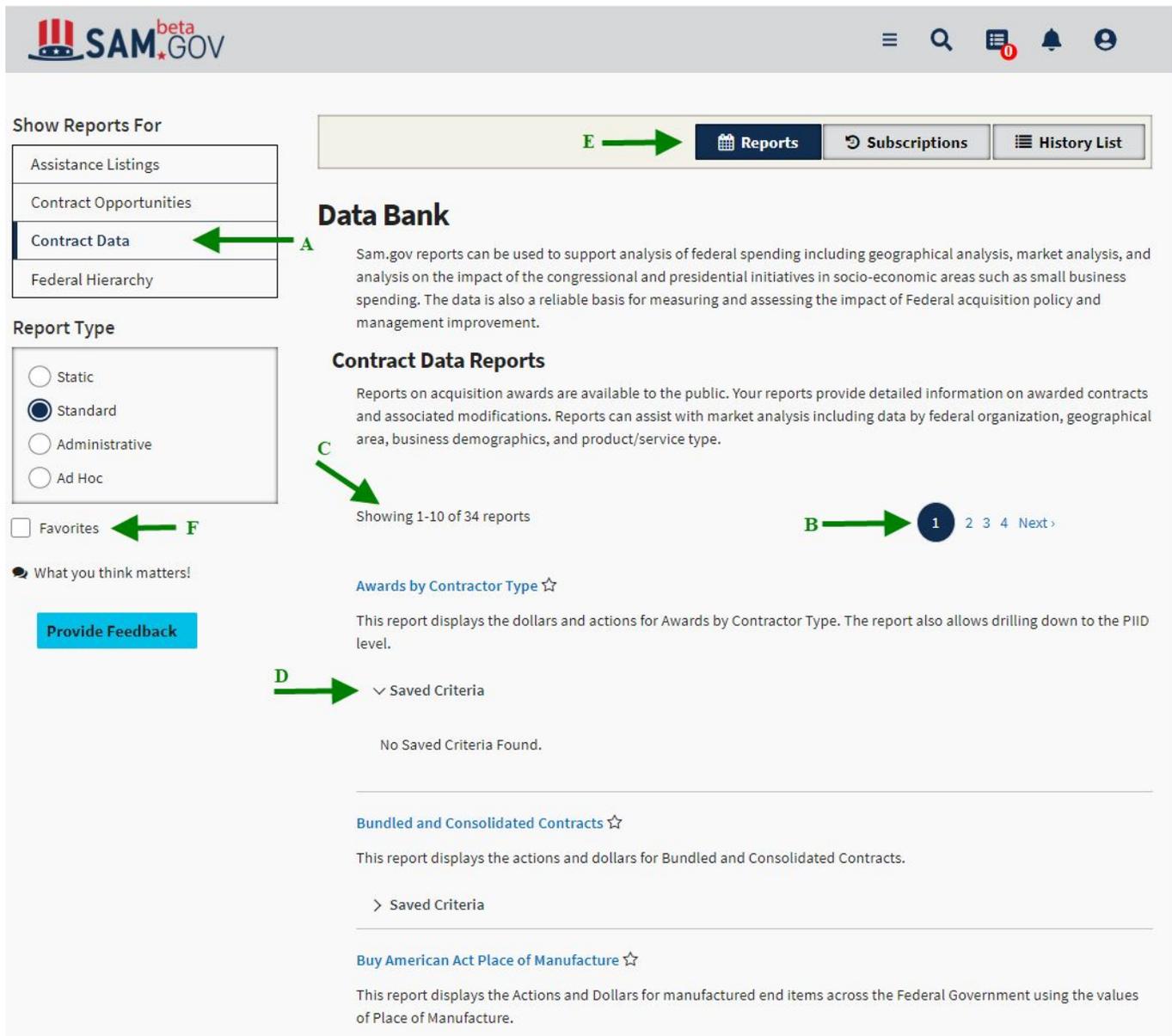
Create an account'. At the bottom, there is a link: '[Use government employee ID](#)'. Two green arrows point to the 'Sign In' button and the 'Create an account' link." data-bbox="246 118 799 632"/>

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.



**Show Reports For**

- Assistance Listings
- Contract Opportunities
- Contract Data** ← A
- Federal Hierarchy

**Report Type**

- Static
- Standard
- Administrative
- Ad Hoc

Favorites ← F

What you think matters!

[Provide Feedback](#)

**Data Bank**

Sam.gov reports can be used to support analysis of federal spending including geographical analysis, market analysis, and analysis on the impact of the congressional and presidential initiatives in socio-economic areas such as small business spending. The data is also a reliable basis for measuring and assessing the impact of Federal acquisition policy and management improvement.

**Contract Data Reports**

Reports on acquisition awards are available to the public. Your reports provide detailed information on awarded contracts and associated modifications. Reports can assist with market analysis including data by federal organization, geographical area, business demographics, and product/service type.

Showing 1-10 of 34 reports ← C

← B → 1 2 3 4 Next >

**Awards by Contractor Type** ☆

This report displays the dollars and actions for Awards by Contractor Type. The report also allows drilling down to the PIID level.

↓ D → Saved Criteria

No Saved Criteria Found.

**Bundled and Consolidated Contracts** ☆

This report displays the actions and dollars for Bundled and Consolidated Contracts.

> Saved Criteria

**Buy American Act Place of Manufacture** ☆

This report displays the Actions and Dollars for manufactured end items across the Federal Government using the values of Place of Manufacture.

← E → **Reports** Subscriptions History List

### Key elements of the Data Bank Home page:

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

- 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.

Back to: Standard Reports ← A

### Federal Contract Actions and Dollars

Description ← B +

Report Criteria ← C -

Date range correspond to the Date Signed on Procurement Awards

From			To		
Month	Day	Year	Month	Day	Year
<input type="text"/>					

Organization

Enter Code or Name  × ...

4700 - GENERAL SERVICES ADMINISTRATION ×

Dept / Ind. Agency

Contracting Office Region

Execute Save Clear PDF Export

- 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

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
<b>Total</b>	<b>60,234,937</b>	<b>\$369,459,130,174.59</b>	<b>57,408,979</b>	<b>\$282,907,559,036.17</b>	<b>2,413,258</b>	<b>\$75,881,547,186.49</b>	<b>8,235</b>

**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
<b>Total</b>		<b>1,381,266</b>	<b>\$77,812,148,357.54</b>	<b>311,590</b>	<b>\$59,055,721,210.29</b>	<b>751,747</b>	<b>\$14,850,726,944.62</b>	<b>1,795</b>

**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 (Historically Black College or University) 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	3
<b>Total</b>		<b>135,574</b>	<b>\$56,319,431,733.10</b>	<b>65,564</b>	<b>\$41,295,305,813.69</b>	<b>64,614</b>	<b>\$12,558,025,232.81</b>	<b>855</b>	<b>3</b>

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**  
 

**Subtier**  
 

**Major Command**  
 

**Sub Command**  
 

**Office**  
 

Show Inactive

Selected Values (0) Clear all

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

Cancel
Select

- 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 MicroStartegy PDF icon at the report toolbar only provides the report without the appendix.



DoD report data that are funded by DoD are delayed 90 days for non DoD users.

The maximum number of rows allowed is 150,000. For better results, please further limit your report search criteria by reducing the date range or providing more specific information where applicable.

Appendix



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

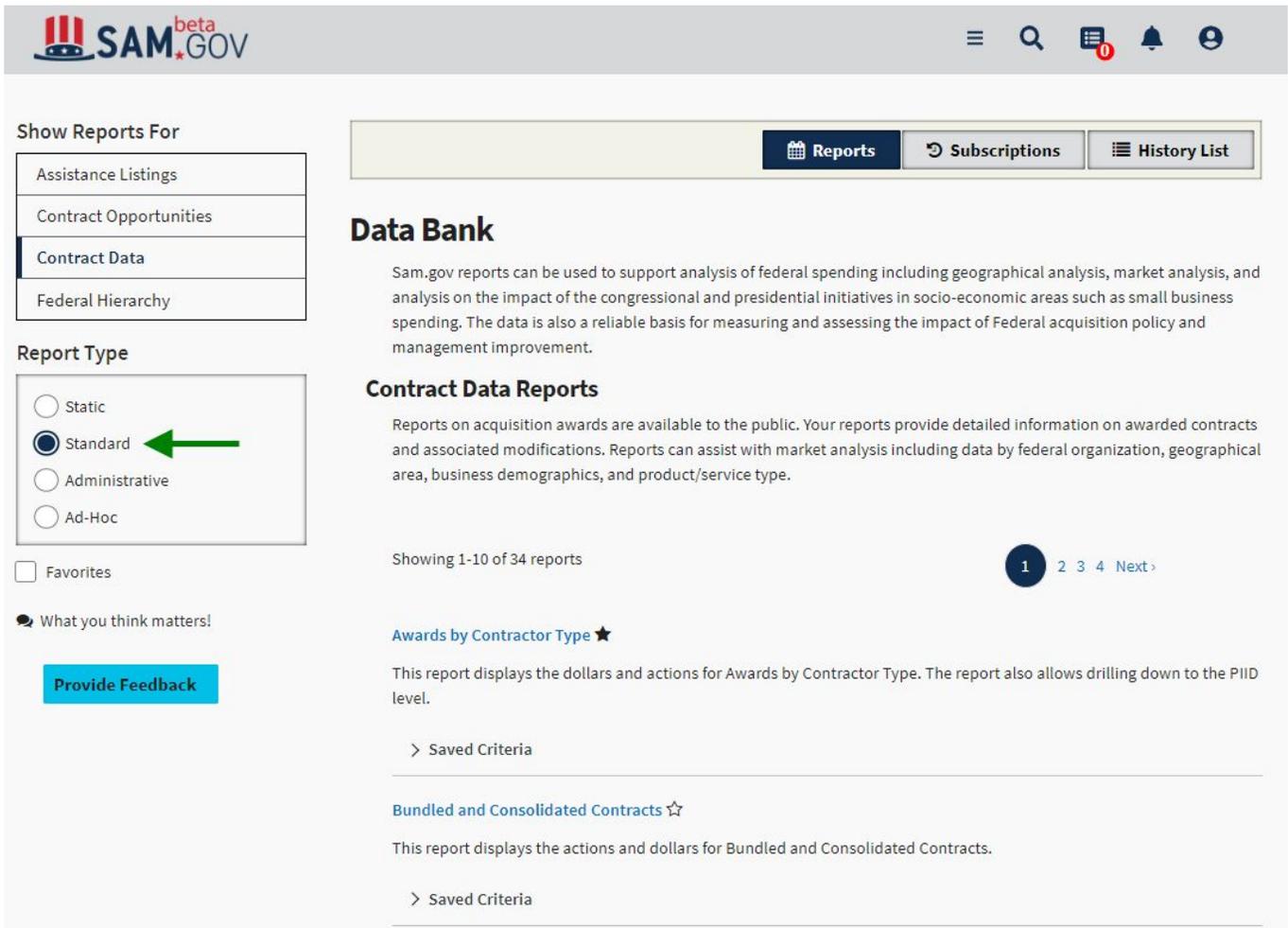
Appendix - The **Appendix** is different for each report. It provides information on the calculations and exclusions for the report. User can click "+" to open the **Appendix** accordion.

## 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.



**Show Reports For**

- Assistance Listings
- Contract Opportunities
- Contract Data**
- Federal Hierarchy

**Report Type**

- Static
- Standard
- Administrative
- Ad-Hoc

Favorites

What you think matters!

[Provide Feedback](#)

**Reports** | Subscriptions | History List

## Data Bank

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Showing 1-10 of 34 reports

1 2 3 4 Next >

[Awards by Contractor Type](#) ★

This report displays the dollars and actions for Awards by Contractor Type. The report also allows drilling down to the PIID level.

> Saved Criteria

[Bundled and Consolidated Contracts](#) ☆

This report displays the actions and dollars for Bundled and Consolidated Contracts.

> Saved Criteria

2. Enter report criteria:
  3. Click **Execute** to run the report
- See a screenshot below:

## Federal Contract Actions and Dollars

Description +

Report Criteria -

Date range correspond to the Date Signed on Procurement Awards

From			To		
Month	Day	Year	Month	Day	Year
<input type="text"/>					

Organization

Enter Code or Name x ...

4700 - GENERAL SERVICES ADMINISTRATION x  
*Dept / Ind. Agency*

Contracting Office Region v

Execute Save Clear PDF Export

### 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 bottom of the report
- User name along with a date and time stamp are in the footer of each page

## Report Result page

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

### Federal Contract Actions and Dollars Report

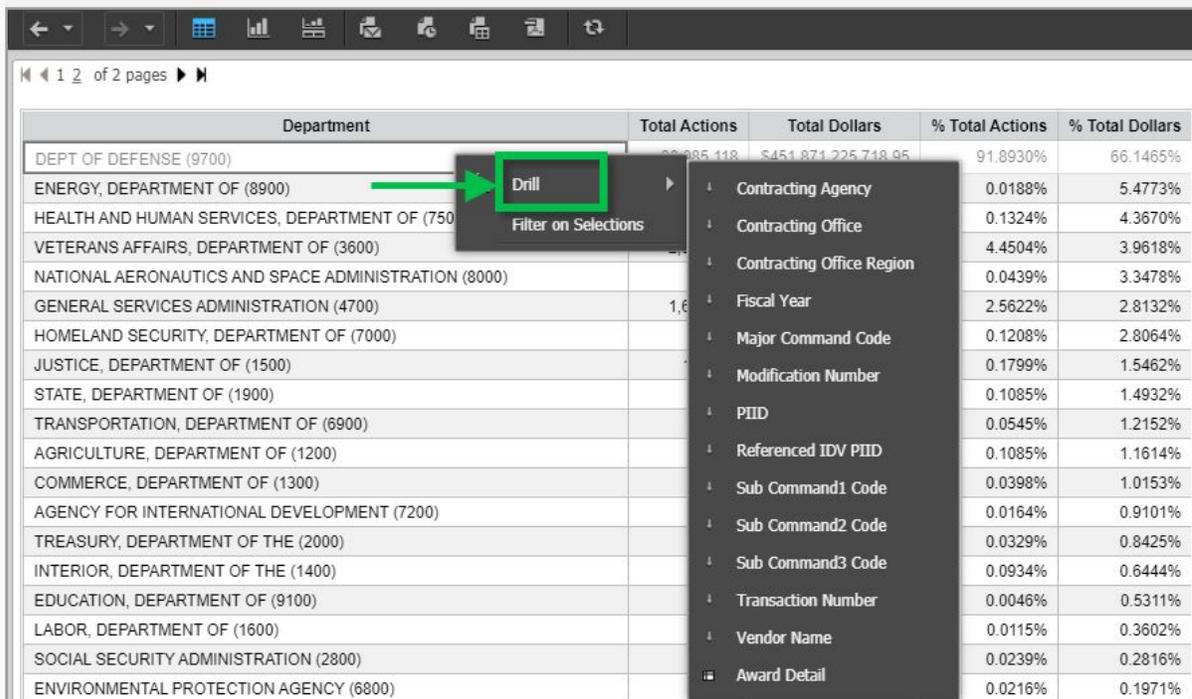
Department	Total Actions	Total Dollars	% Total Actions	% Total Dollars
VETERANS AFFAIRS, DEPARTMENT OF (3600)	247,455	\$942,478,237.64	98.5496%	92.1528%
DEPT OF DEFENSE (9700)	3,088	\$58,876,194.85	1.2298%	5.7567%
AGRICULTURE, DEPARTMENT OF (1200)	350	\$10,989,347.80	0.1394%	1.0745%
INTERIOR, DEPARTMENT OF THE (1400)	17	\$2,073,549.34	0.0068%	0.2027%
HEALTH AND HUMAN SERVICES, DEPARTMENT OF (7500)	34	\$1,543,838.83	0.0135%	0.1510%
COMMERCE, DEPARTMENT OF (1300)	4	\$1,482,309.56	0.0016%	0.1449%
JUSTICE, DEPARTMENT OF (1500)	67	\$1,432,925.96	0.0267%	0.1401%
SOCIAL SECURITY ADMINISTRATION (2800)	6	\$1,385,280.80	0.0024%	0.1354%
GENERAL SERVICES ADMINISTRATION (4700)	8	\$991,278.04	0.0032%	0.0969%
HOMELAND SECURITY, DEPARTMENT OF (7000)	16	\$564,238.55	0.0064%	0.0552%
STATE, DEPARTMENT OF (1900)	16	\$247,964.30	0.0064%	0.0242%
TRANSPORTATION, DEPARTMENT OF (6900)	8	\$186,691.00	0.0032%	0.0183%
OFFICE OF PERSONNEL MANAGEMENT (2400)	1	\$135,990.00	0.0004%	0.0133%
EXPORT-IMPORT BANK OF THE U.S. (8300)	3	\$101,085.75	0.0012%	0.0099%
AGENCY FOR INTERNATIONAL DEVELOPMENT (7200)	1	\$95,040.00	0.0004%	0.0093%
TREASURY, DEPARTMENT OF THE (2000)	4	\$79,277.59	0.0016%	0.0078%
UNITED STATES AGENCY FOR GLOBAL MEDIA, BBG (9568)	9	\$28,911.00	0.0036%	0.0028%
FEDERAL MEDIATION AND CONCILIATION SERVICE (9300)	1	\$23,040.00	0.0004%	0.0023%
SMITHSONIAN INSTITUTION (3300)	3	\$18,309.22	0.0012%	0.0018%
ENERGY, DEPARTMENT OF (8900)	1	\$1,268.82	0.0004%	0.0001%
NATIONAL AERONAUTICS AND SPACE ADMINISTRATION (8000)	1	\$0.00	0.0004%	0.0000%
ENVIRONMENTAL PROTECTION AGENCY (6800)	3	\$0.00	0.0012%	0.0000%
FEDERAL COMMUNICATIONS COMMISSION (2700)	1	(\$0.02)	0.0004%	(0.0000%)
<b>Total</b>	<b>251,097</b>	<b>\$1,022,734,779.03</b>	<b>100.0000%</b>	<b>100.0000%</b>

## 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.

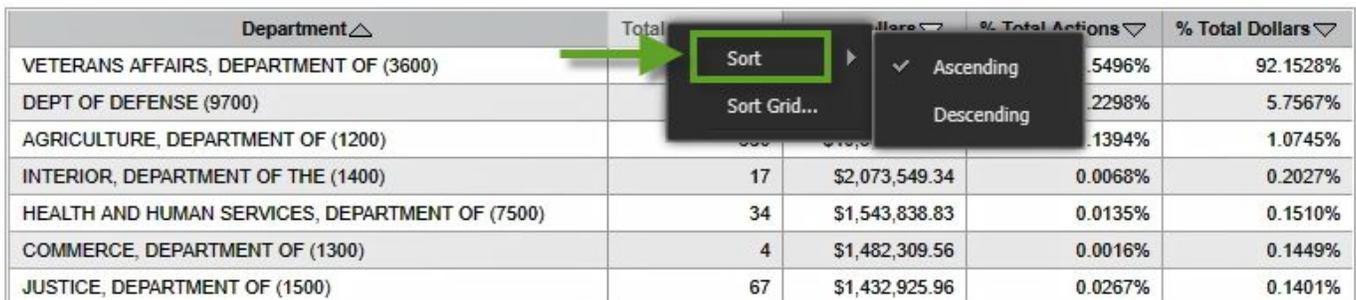
- Drill** - Add an attribute element (insert one column at a time) or user can run a workflow from the attribute. In the example below “Award Detail” has a different icon indicating a workflow.

**Note:** Users cannot drill down on calculations / metrics.



Department	Total Actions	Total Dollars	% Total Actions	% Total Dollars
DEPT OF DEFENSE (9700)	22,285,118	\$451,871,225,718.95	91.8930%	66.1465%
ENERGY, DEPARTMENT OF (8900)			0.0188%	5.4773%
HEALTH AND HUMAN SERVICES, DEPARTMENT OF (7500)			0.1324%	4.3670%
VETERANS AFFAIRS, DEPARTMENT OF (3600)			4.4504%	3.9618%
NATIONAL AERONAUTICS AND SPACE ADMINISTRATION (8000)			0.0439%	3.3478%
GENERAL SERVICES ADMINISTRATION (4700)	1,600		2.5622%	2.8132%
HOMELAND SECURITY, DEPARTMENT OF (7000)			0.1208%	2.8064%
JUSTICE, DEPARTMENT OF (1500)			0.1799%	1.5462%
STATE, DEPARTMENT OF (1900)			0.1085%	1.4932%
TRANSPORTATION, DEPARTMENT OF (6900)			0.0545%	1.2152%
AGRICULTURE, DEPARTMENT OF (1200)			0.1085%	1.1614%
COMMERCE, DEPARTMENT OF (1300)			0.0398%	1.0153%
AGENCY FOR INTERNATIONAL DEVELOPMENT (7200)			0.0164%	0.9101%
TREASURY, DEPARTMENT OF THE (2000)			0.0329%	0.8425%
INTERIOR, DEPARTMENT OF THE (1400)			0.0934%	0.6444%
EDUCATION, DEPARTMENT OF (9100)			0.0046%	0.5311%
LABOR, DEPARTMENT OF (1600)			0.0115%	0.3602%
SOCIAL SECURITY ADMINISTRATION (2800)			0.0239%	0.2816%
ENVIRONMENTAL PROTECTION AGENCY (6800)			0.0216%	0.1971%

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



Department	Total	Dollars	% Total Actions	% Total Dollars
VETERANS AFFAIRS, DEPARTMENT OF (3600)			5.496%	92.1528%
DEPT OF DEFENSE (9700)			22.98%	5.7567%
AGRICULTURE, DEPARTMENT OF (1200)			1.394%	1.0745%
INTERIOR, DEPARTMENT OF THE (1400)	17	\$2,073,549.34	0.0068%	0.2027%
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### 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 Dollars	% Total Actions	% Total Dollars
VETERANS AFFAIRS, DEPARTMENT OF (3600)	247,455	\$942,478,237.64	98.5496%	92.1528%
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INTERIOR, DEPARTMENT OF THE (1400)				
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JUSTICE, DEPARTMENT OF (1500)				
SOCIAL SECURITY ADMINISTRATION (2800)				
GENERAL SERVICES ADMINISTRATION (4700)				
HOMELAND SECURITY, DEPARTMENT OF (7000)				
STATE, DEPARTMENT OF (1900)				
TRANSPORTATION, DEPARTMENT OF (6900)				
OFFICE OF PERSONNEL MANAGEMENT (2400)				
EXPORT-IMPORT BANK OF THE U.S. (8300)				
AGENCY FOR INTERNATIONAL DEVELOPMENT (7200)				
TREASURY, DEPARTMENT OF THE (2000)				
UNITED STATES AGENCY FOR GLOBAL MEDIA, BBG (9568)				
FEDERAL MEDIATION AND CONCILIATION SERVICE (9300)				
SMITHSONIAN INSTITUTION (3300)				
ENERGY, DEPARTMENT OF (8900)				
NATIONAL AERONAUTICS AND SPACE ADMINISTRATION (8000)				
ENVIRONMENTAL PROTECTION AGENCY (6800)				
FEDERAL COMMUNICATIONS COMMISSION (2700)				
Total				

**Advanced Sort** ? x

Order	Sort by			
1	Total Dollars	Descending	x	
2	Total Actions	Ascending	x	
3		Ascending	x	

Rows
Columns

OK
Cancel

## Report Toolbar

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

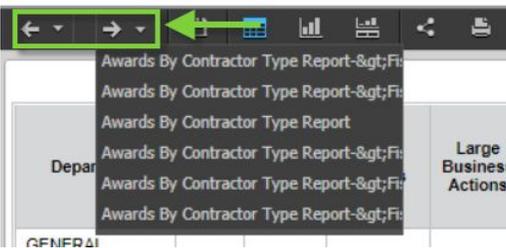
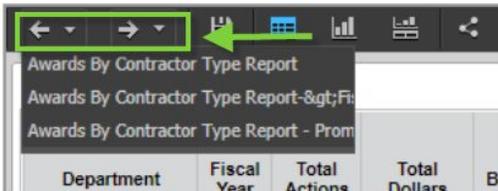


Name	Icon	Description
<b>Back (previous)</b>		Returns user to previous summary report or other executed reports. Click the down arrow to bring up the past 10 items executed.
<b>Forward</b>		Moves user forward to the previously executed reports such as a drill down report or a workflow report. Click the forward arrow to bring up to 10 previous items.
<b>Grid</b>		Displays the report as a grid, similar to a standard spreadsheet style.
<b>Graph</b>		Displays the report as a graph. MicroStrategy can display data in numerous graph types and styles.
<b>Grid and Graph</b>		Displays the report in both grid and graph views at the same time on the screen.
<b>Print</b>		Allows user to specify print settings for the report and print the report.
<b>Send Now</b>		Allows user to email executed report detail or/and report link to specified email addresses.
<b>Schedule Delivery to History List</b>		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.
<b>Export</b>		Exports all (or a portion) of the report in Excel, CSV, HTML, or plain text format. Does not include the report appendix information.
<b>PDF</b>		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 <b>PDF Export</b> button in the Report Criteria Accordion if appendix is needed.
<b>Refresh</b>		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.

**Federal Contract Actions and Dollars**

Print: Whole report ▼

Page Header and Footer: Edit Custom Settings...

Scaling:

Adjust font to 100 % of original size

Fit to: 1 pages wide by 1 tall

Report Header: Edit Custom Settings...

Orientation:

Portrait 

Landscape 

Print cover page

With Filter Details

With Report Details

Cover page location:

Before report

After report

Show advanced options

Do not prompt me again.

Show Printable Version

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.

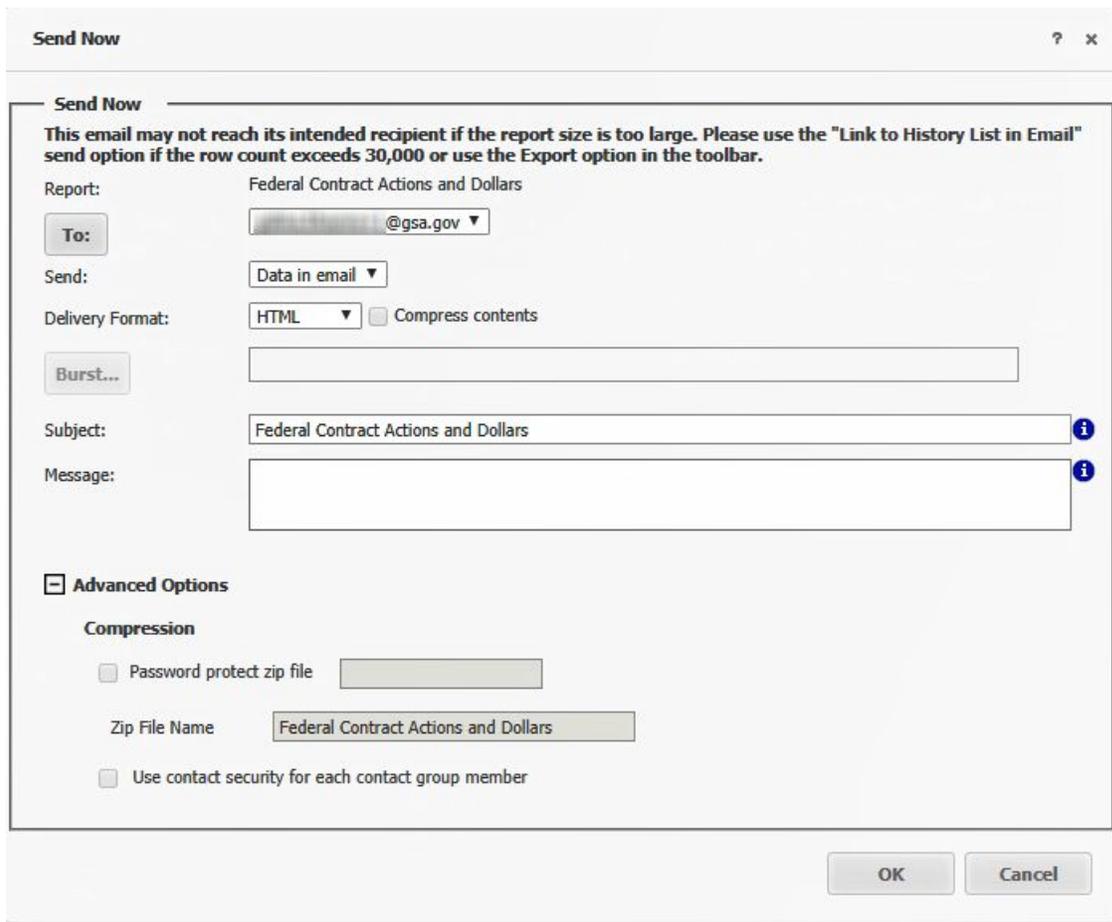
**Note:** If report results are large, the Send Now function is not the best option for providing results to others. Please consider using the Export option in the toolbar. See the **Export** Reference in this document.

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.



**Send Now**

This email may not reach its intended recipient if the report size is too large. Please use the "Link to History List in Email" send option if the row count exceeds 30,000 or use the Export option in the toolbar.

Report: Federal Contract Actions and Dollars

To: [redacted]@gsa.gov

Send: Data in email

Delivery Format: HTML  Compress contents

Burst... [ ]

Subject: Federal Contract Actions and Dollars

Message: [ ]

**Advanced Options**

**Compression**

Password protect zip file [ ]

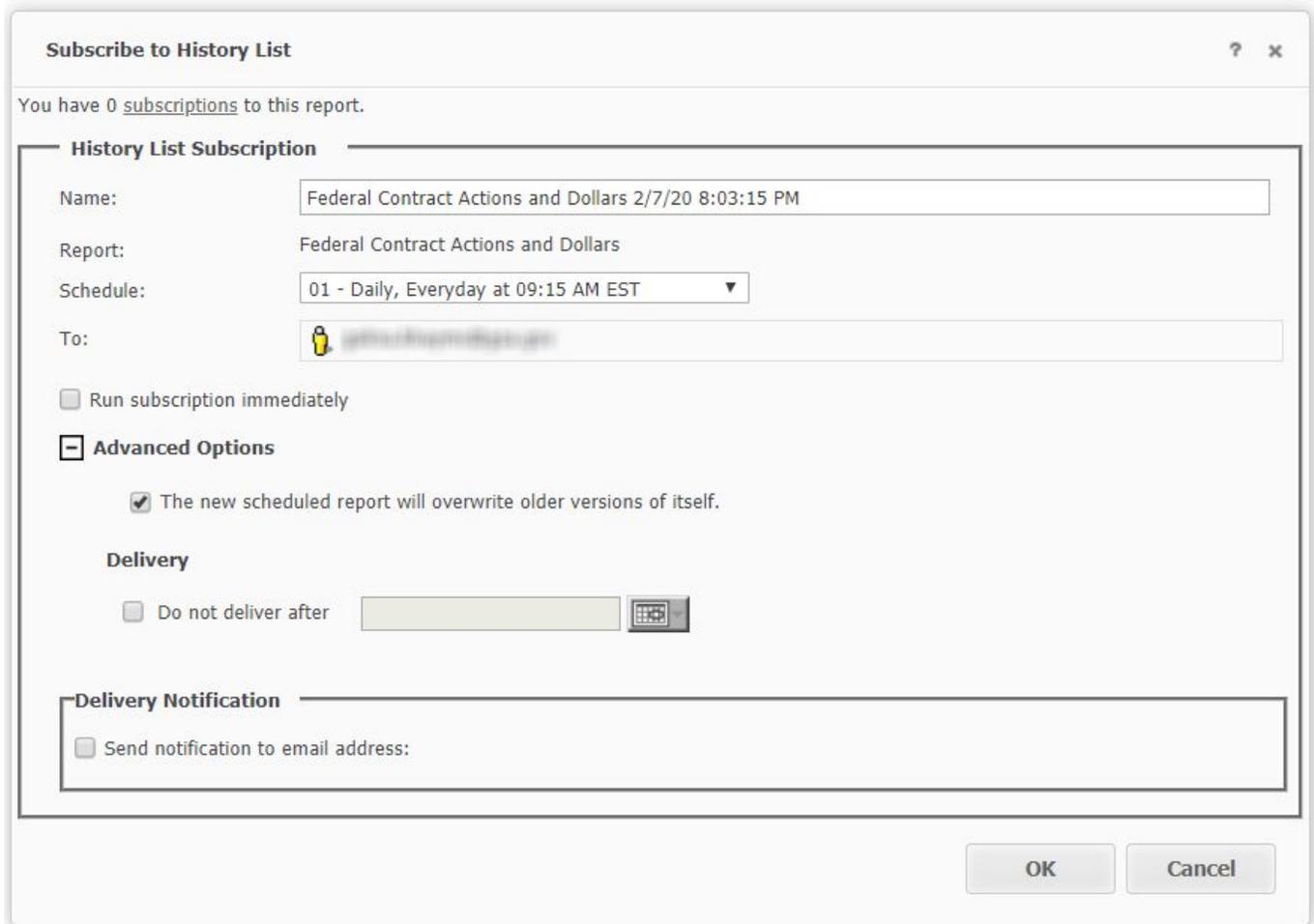
Zip File Name: Federal Contract Actions and Dollars

Use contact security for each contact group member

OK Cancel

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 



The screenshot shows a dialog box titled "Subscribe to History List" with a close button (X) and a help button (?). Below the title bar, it states "You have 0 subscriptions to this report." The main content area is titled "History List Subscription" and contains the following fields and options:

- Name:** Federal Contract Actions and Dollars 2/7/20 8:03:15 PM
- Report:** Federal Contract Actions and Dollars
- Schedule:** 01 - Daily, Everyday at 09:15 AM EST (dropdown menu)
- To:**  [gsmc@gsa.gov](#)
- Run subscription immediately
- Advanced Options**
  - The new scheduled report will overwrite older versions of itself.
- Delivery**
  - Do not deliver after  
- Delivery Notification**
  - Send notification to email address:

At the bottom right of the dialog box are "OK" and "Cancel" buttons.

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.

## Export

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

**Federal Contract Actions and Dollars**

Export: Whole report ▾

Excel with plain text  
 CSV file format  
 Excel with formatting  
 HTML  
 Plain text    Delimiter: Comma ▾

Export Report Title  
 Export filter details  
 Remove extra column: Automatic ▾

Do not prompt me again.

Export Header and Footer: Edit Custom Settings...

**Excel options:**

Export metric values as text  
 Export headers as text

**Excel with formatting options:**

Embed all images

Export

Follow these steps to use the Export functionality:

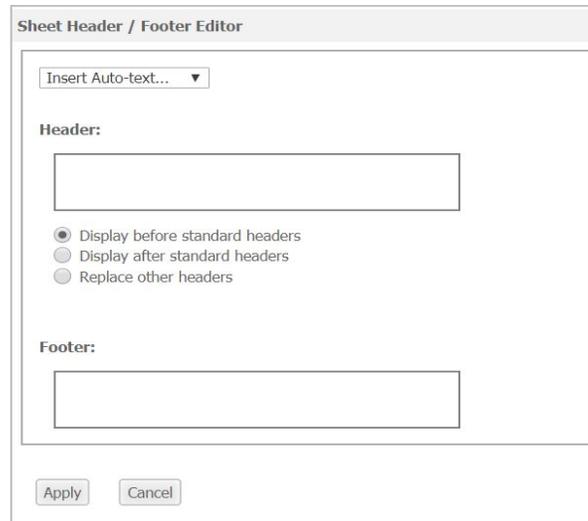
1. Select the **Export** icon from the Toolbar.
2. **Choose one** of the two options for what to export:
  - a. **Whole Report** – all returned rows will be exported.
  - b. **Portion displayed only** – Use this option to export the rows that are currently displayed in the grid.
3. **Choose one** of 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.



The screenshot shows a dialog box titled "Sheet Header / Footer Editor". At the top, there is a dropdown menu labeled "Insert Auto-text...". Below this, there are two sections: "Header:" and "Footer:". Each section has a text input field. Under the "Header:" section, there are three radio button options: "Display before standard headers" (which is selected), "Display after standard headers", and "Replace other headers". At the bottom of the dialog, there are "Apply" and "Cancel" buttons.

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.

**Federal Contract Actions and Dollars**

Export:

Scaling:

Adjust font to  % of original size

Fit to:  pages wide by  tall

Orientation:

Portrait 

Landscape 

Paper size:

Margins (Inches):

Left:	Right:
<input type="text" value="0.75"/>	<input type="text" value="0.75"/>
Top:	Bottom:
<input type="text" value="0.75"/>	<input type="text" value="0.75"/>

Maximum header size (Inches):

Maximum footer size (Inches):

Embed fonts

Page Header and Footer:

Report Header:

Print cover page

With Filter Details

With Report Details

Cover page location:

Before report

After report

Do not prompt me again.

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