Federal Procurement Data System - FPDS

Melea Crouse
Asst. Assoc. Director
Office of Small Business Program

November 2015
Session Agenda

- Defining the Federal Procurement Data System (FPDS-NG)
- What’s In It for You; Private Sector Use?
- Did You Know…
- Let’s Get Started
FPDS-NG Is...

- Single Authoritative repository for Federal contract data; Housed at GSA’s Federal Procurement Data Center

- Agencies required to log ALL contract actions when:
  - Appropriated funds expensed in excess of $3,000 (3k)
  - Every contract mod is reported, regardless of $ value
Certain ACTIONS have other funding sources and those are NOT required in FPDS:

- Financial Assistance Programs (Grants/Subsidies)
- Government OPEX Funds
- GSA Consolidated Purchase Program (State/Local Gov)

Authoritative Sources Of Reference Data

- SAM (CCR)
- NAICS
- PSC Codes

Validation rules based on:

- FAR
- Individual Agency Regulations (e.g. DFARS)
FPDS-NG Is… (cont.)

**General Contract Data**

- **Dates**
  - Date Signed
  - Date Effective
  - Last Date to Order
  - Completion Date

- **Amounts**
  - Action Obligation
  - Value of Base + Options

- **Contractor Information**
  - SAM information
  - Socio/Economic Data

- **Preference Programs**
  - KO’s Business Size Selection
  - Subcontracting Plan Req’ments

- **Legislative Mandates**
  - Walsh Healey Act
  - Davis Bacon Act

- **Service/Commodity Information**
  - Service Code
  - NAICS Code

- **Competition Information**
  - Extent Competed
  - Type of Set Asides
  - Sole Source
  - Award Type

- **Buying Activity’s Customers**
  - Funding Agency ID
  - TAS Identifier
  - TAS Main Account

- **Contracting Office Information**
Private Sector Uses…

FPDS Provides Detailed Information To Capture Your Marketing/Planning Strategy:

- **Key Contract Vehicle Data**
  - Total Contract Value
  - Period of Performance Dates
  - How Many Bids Were Received
  - Scope of Work
  - Place of Performance

- **Key Task Order Data**
  - Who’s winning task orders; most $ and #?
  - What Client(s) use what vehicle(s)
  - What type of work is acquired?
FPDS Facilitates Accelerated Data For Analysis:

- Prints Directly to PDF
- Imports Data to Excel
- Provides Email Capability
- Provides Data Across 22 Core Elements
Did You Know…

- FPDS is largest source for Business Development Intelligence
- FPDS provides visibility into acquisition trends
- Use data export feature for faster data sorts in Excel
- FPDS-NG is USASpending.gov’s source for contract data; pulls data once a month
How to Get Started...

- Anyone can get an account. Public accounts can only access data that is at least 90 days old (DOD data only).

- Creating a public account
  - Register at [www.fpds.gov](http://www.fpds.gov)

- Training
  - See “Manuals” side bar on the right
Let’s Get Going…

- **EZSearch**
  - Google-like search that allows you pull up any CAR with given search criteria
  - Like an ad hoc report but for simple queries
  - Allows you to view an entire CAR or export search results into Excel
  - No account required

- **Standard Reports**
  - Commonly used reports with set queries
  - Can drill down to award detail

- **Ad Hoc reports**
  - User-created, reusable report
  - Can include or filter by any CAR field
EZSearch

- Like an ad hoc but for simple queries
- Usage Example: You have a contract number and want to see who the vendors are
- No need to log in
- Simply type the contract number into the search field (without hyphens)
- Click ‘(view)’ to view the CAR
- Click the ‘CSV’ button to export list of all CARs in output to Excel
- Can include any search criteria, but must know FPDS values
  - Use ‘Advanced Search’ to assist with query syntax

Let’s go to an example....
FPDS Home Page / EZSearch Example

Searching Keywords
- 236220 – General Construction
- Fort Worth

NIA - Operation Freedom's Sentinel (OFS)
A new National Interest Action value 'Operation Freedom's Sentinel' has been added to track the relief contracts.
For Web Portal users the value 'Operation Freedom's Sentinel' is available for selection in the National Interest Action field dropdown. The Contract Writing systems using V1.4 shall use the code 'O15F' when creating/updating documents through Business Services.
National Interest Action value 'Operation Freedom's Sentinel' is valid from 01/01/2015 to 12/31/2015.

NIA - Operation United Assistance
A new National Interest Action value 'Operation United Assistance (OUA) - Ebola Outbreak West Africa' has been added to track the relief contracts.
For Web Portal users the value 'Operation United Assistance (OUA) - Ebola Outbreak West Africa' is available for selection in the National Interest Action field dropdown. The Contract Writing systems using V1.4 shall use the code 'O14E' when creating/updating documents through Business Services.
National Interest Action value 'Operation United Assistance (OUA) - Ebola Outbreak West Africa' is valid...
## EZSearch Results

### Top 10: Department Full Name

1. **DEPT OF DEFENSE (3581)**
   - Award Type: DELIVERY OF
   - Contracting Agency: DEPT OF THE
   - Action Obligation: $147,617.86
   - Contracting Office: WTSF ENDST

2. **GENERAL SERVICES ADMINISTRATION (920)**
   - PSC (Code): CONSTR (1119)

3. **VETERANS AFFAIRS, DEPARTMENT OF (169)**
   - Vendor DUNS: 818430904
   - Vendor ZIP: 770418234
   - Global Vendor Number: 818430904

4. **HOMELAND SECURITY, DEPARTMENT OF (31)**
   - Award Type: DELIVERY OF
   - Contracting Agency: DEPT OF THE
   - Action Obligation: $16,328.05

5. **TREASURY, DEPARTMENT OF THE (29)**

6. **TRANSPORTATION, DEPARTMENT OF (20)**

7. **JUSTICE, DEPARTMENT OF (11)**

8. **LABOR, DEPARTMENT OF (5)**

9. **AGRICULTURE, DEPARTMENT OF (3)**

10. **OFFICE OF PERSONNEL MANAGEMENT**

### Top 10: Vendor Full Name

1. **PATTON CONTRACTORS, INC. (327)**
   - Vendor City: HOUSTON
   - Date Signed: August 20, 2011
   - Referenced IDV: W9126009D00076
   - NAICS (Code): 236220

2. **ED A WILSON INCORPORATED (248)**
   - Vendor City: HOUSTON
   - Vendor State: TX

3. **K&L GENERAL CONTRACTORS, INC. (211)**
   - Vendor City: HOUSTON
   - Vendor State: TX

4. **AFFILIATED WESTERN, INC. (200)**
   - Vendor City: HOUSTON
   - Vendor State: TX

5. **TTG UTILITIES LIMITED PARTNERSHIP (191)**

6. **PATTON CONTRACTORS INCORPORATED (189)**

7. **HUGHES AND GUZMAN CONSTRUCTION LIMITED LIABILITY COMPANY (127)**

8. **DALE WALZEL CONSTRUCTION (122)**

9. **THE ROSS GROUP CONSTRUCTION CORPORATION (115)**

10. **BASECOM INC (74)**
EZSearch Results – Contract Action Report

<table>
<thead>
<tr>
<th>Transaction Information</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Type:</td>
<td>Delivery/Task Order</td>
<td>Prepared Date:</td>
<td>01/04/2012</td>
<td>14:55:32</td>
</tr>
<tr>
<td>Award Status:</td>
<td>Final</td>
<td>Prepared User:</td>
<td><a href="mailto:LESLIE.E.GUY.W9126G@SWF02.USACE.ARMY.MIL">LESLIE.E.GUY.W9126G@SWF02.USACE.ARMY.MIL</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Last Modified Date:</td>
<td>01/04/2012</td>
<td>14:55:49</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Last Modified User:</td>
<td><a href="mailto:LESLIE.E.GUY.W9126G@SWF02.USACE.ARMY.MIL">LESLIE.E.GUY.W9126G@SWF02.USACE.ARMY.MIL</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Document Information</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency</td>
<td>Procurement Identifier</td>
<td>Modification No</td>
</tr>
<tr>
<td>Award ID:</td>
<td>9700</td>
<td>0003</td>
</tr>
<tr>
<td>Referenced IDV ID:</td>
<td>9700</td>
<td>W9126G09D0076</td>
</tr>
<tr>
<td>Reason For Modification:</td>
<td>CHANGE ORDER</td>
<td></td>
</tr>
<tr>
<td>Solicitation ID:</td>
<td>W9126G09R0069</td>
<td></td>
</tr>
<tr>
<td>Treasury Account Symbol:</td>
<td>96</td>
<td>3122</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dates</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Signed (mm/dd/yyyy):</td>
<td>01/04/2012</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective Date (mm/dd/yyyy):</td>
<td>12/22/2011</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completion Date (mm/dd/yyyy):</td>
<td>03/03/2012</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Est. Ultimate Completion Date (mm/dd/yyyy):</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Amounts                |                      |                      |                      |
| Action Obligation:     |                      |                      |                      |
| Base And Exercised Options Value: | $147,617.86         | $18,013,265.02       |
| Base And All Options Value: | $147,617.86         | $18,013,265.02       |

Items of Interest
- Award Type
- Contracting Official
- Completion Dates, and more…
Standard Reports...

You will need an account to access Standard Reports
Standard Reports – Main Menu

WHO
- Awards by Contractor Type
- Contractor Search

WHAT
- Fed Contract Actions & Dollars
- Total Actions by NAICS
- Total Actions by PSC
- Trade Agreements

WHERE
- Buy American Act
- Place of Performance
- Vendor Location

WHEN
- Contract Detail
- Procurement
- History for Market Research Report

HOW
- Buying via Govt Acquisition Vehicle
- Purchase Card as Payment Method
- Subcontracting Plan Report

Not all reports represented below
Standard Reports…(cont.)

- Procurement History for Market Research
  - Gives contract spending by product/service type, vendor name, contracting office, socioeconomic info, etc.
  - Can be filtered by date, product/service type, description of requirement, vendor location, and purchasing agency.
  - Usage example: You could search for all FY11 DoD contracts in highway construction (PSC C122) in your state. You could then drill down to view each award, including the awarding contract office and vendor name.

Let’s go to an example….
Click here to run the report.

Click here to save the report, with your current criteria, for future use.

Name your report if you want to save it for future use.

PSC codes can be looked up here.

Department and agency IDs can be looked up here. Setting Dept ID = 9700 will restrict results to Defense Department contracts only.
The report displays a summary of all awards under your chosen PSC, and has listed them by “description of requirement.” To view vendor and buying activity information for awards under a specific description, right click on the description and hover over “drill…”

<table>
<thead>
<tr>
<th>Description of Requirement</th>
<th>Total Actions</th>
<th>Total Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>RUNWAY 01-19 REPAIR AND DESIGN</td>
<td>1</td>
<td>$1,969,210.66</td>
</tr>
<tr>
<td>REPAIR TRUERMER RD</td>
<td>1</td>
<td>$1,043,844.80</td>
</tr>
<tr>
<td>RECONSTRUCT RANGE ROAD 7 SECTION 12</td>
<td>1</td>
<td>$983,431.98</td>
</tr>
<tr>
<td>PHASE I - RUBBER REMOVAL</td>
<td>1</td>
<td>$798,798.63</td>
</tr>
<tr>
<td>RESURFACE KELLY RD</td>
<td>1</td>
<td>$618,318.00</td>
</tr>
<tr>
<td>RESURFACE EAGLE RD.</td>
<td>1</td>
<td>$520,984.50</td>
</tr>
<tr>
<td>RESURFACE GATEWAY PARKING LOT</td>
<td>1</td>
<td>$513,775.60</td>
</tr>
</tbody>
</table>
Standard Reports…(cont.)

- Contract Detail
  - Gives complete contractual data for the specified PIID (aka stand-alone actions or delivery/task orders)
  - Usage example: You provide a cutting-edge, cost-saving, sustainability product perfect for construction. You could use this report to monitor the solicitation to the modifications to identify additional cost saving techniques your product may provide to the vendor.

Let’s go to an example….
Click on Execute.....report will populate all contract information for Contract W9126G-10-C-0087
Subcontracting Plan Report

- Displays whether or not a contract has a subcontracting plan, along with buying activity and vendor information
- Usage example: You could search for all FY15 Army Actions that require a Small Business Subcontracting Plan. You can use this report to contact the vendors to see if they are still looking for subs now or in the future.
Standard Reports...(cont.)

Click on Execute.....report will populate those firms who have subcontracting plan requirements.
Standard Reports…(cont.)

- Drill down all the way to ‘award detail’ which includes most contract fields used by the government
- Email or export into Excel for further analysis
- Limits:
  - 30,000 rows
  - 5 years
- The report appendix – aka “The Magnifying Glass”
  - Shows how the report was constructed: What fields and filters were included
- Save reports with particular settings for future use
Ad Hoc Reports…

- Create your own report using any FPDS fields

- Usage Example: You’re a service-disabled veteran-owned small business providing data management services in the Washington, DC area. You can design a report that pulls every contract in your NAICS code over the past several years along with buying activity information, vendor information, and whether a SDVOSB set-aside was used. You can also pull the estimated completion date.

Let’s go to an example…
### Description of Requirement

| CAPITAL PLANNING AND INVESTMENT CONTROL SUPPORT SERVICES FOR OSHA INFORMATION SYSTEM |
| ENTERPRISE DATA STORAGE SRVCS IN SUPPORT OF U.S. INFO TECH AGENCY - STORAGE SRVCS BRNCH |
| ENTERPRISE DATA STORAGE SRVCS IN SUPPORT OF U.S. INFO TECH AGENCY - STORAGE SRVCS BRNCH |

### HOW?

- GSA Schedule
- SDVOSB Sole Source

### AGENCIES

- DOL
- DOJ
- FCC
- Army
- Air Force

### Vendor Information

<table>
<thead>
<tr>
<th>Vendor Name</th>
<th>Vendor Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTEPROS FEDERAL</td>
<td>202-800-9980</td>
</tr>
<tr>
<td>DEFENSE ENGINEERING</td>
<td>703-888-0206</td>
</tr>
<tr>
<td>THUNDERCAT TECHNOLOGY</td>
<td>571-612-3784</td>
</tr>
<tr>
<td>PROFESSIONAL SOLUTIONS</td>
<td></td>
</tr>
<tr>
<td>OSBORNE COMPUTER SRVCS</td>
<td>703-441-8508</td>
</tr>
<tr>
<td>OASYS INTERNATIONAL</td>
<td>571-297-6896</td>
</tr>
</tbody>
</table>

### Approved By

- LARIBA.CARMELITA.C@DOL.GOV
- BRIAN.M.DONOVAN3.CIV.W52P1J@MAIL.MIL
- FRED.MUSSER@USDOJ.GOV
- BARTON.KAREN.L@DOL.GOV
- MADDOX.WANDA@DOL.GOV
- BRANDON.STOCK.FA7014@AFNCR.AF.MIL
- BARTON.KAREN.L@DOL.GOV
- SUNNY.DIEMERT
Ad Hoc Reports… (cont.)

- Automatically summarizes to the lowest level of detail
  - For example, pulling Major Command, NAICS, and Dollars will aggregate all contracts with the same Major Command
- As with standard reports, ad hoc reports can be saved and reused, emailed, and exported
- Limits:
  - 30,000 rows
  - 5 years
Ad Hoc Reports – Getting Started

- On the home screen, click “Adhoc Reports”
- Click ‘new’ to create a new ad hoc report
- Creating an ad hoc report:
  1. Select metrics
  2. Select attributes
  3. Set Filters
  4. Execute
  5. Supply date range
  6. Display report
- SAVE FREQUENTLY!
Ad Hoc Reports – Step 1: Select Metrics

- Click on ‘1 Select metrics’
- Click plus sign (+) to expand data categories
  - Award – IDV Information
- Click folder name (not +) to get fields
- Select field for output – click add
- You can change the order of fields in the output by clicking the up and down arrows
- Delete fields by clicking the ‘X’
Ad Hoc Reports – Step 1: Select Metrics (cont.)

- Select type of metric in Metric Folder
- Click “Add”
- Metric will display under “1. Select Metrics” tab.

<table>
<thead>
<tr>
<th>Metric Name</th>
<th>Description</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Obligation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dollar Values</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Actions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Transaction Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base and Exercised Options Value</td>
<td></td>
<td>Add</td>
</tr>
<tr>
<td>Action Obligation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Base and All Options Value</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Create Report

Report Name: New Report

Select metrics

Prompt values

Metrics

- Award – IDV Information
  - Dollar Values
  - Contract Actions
  - Other Transaction Information
Ad Hoc Reports – Step 2: Select Attributes

- Click on ‘2 Select attributes’
- Click plus sign (+) to expand data categories
  - Award – IDV Information
- Click folder name (not +) to view fields
- Select field for output, click ‘add’
- You can change the order of fields in the output by clicking the up and down arrows
- Delete fields by clicking the ‘X’
Ad Hoc Reports – Where are the Attribute Fields?

<table>
<thead>
<tr>
<th>Metric</th>
<th>Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awarding Agency, Command, Office</td>
<td>1 Awarding Agency, Command, Office</td>
</tr>
<tr>
<td>Contract, Order, Mod No.</td>
<td>2 Contract, Order, Mod No.</td>
</tr>
<tr>
<td>Dates</td>
<td>3 Dates</td>
</tr>
<tr>
<td>PBA, GPC, TAS</td>
<td>4 PBA, GPC, TAS</td>
</tr>
<tr>
<td>PSC, NAICS</td>
<td>5 PSC, NAICS</td>
</tr>
<tr>
<td>Comp, Fair Opp, Set Aside, Sole Source</td>
<td>6 Comp, Fair Opp, Set Aside, Sole Source</td>
</tr>
<tr>
<td>CAR Type</td>
<td>7 CAR Type</td>
</tr>
<tr>
<td>Who Prepared or Modified it</td>
<td>8 For Orders - IDV info, M/S, IDV Type</td>
</tr>
</tbody>
</table>
Ad Hoc Reports – Step 3: Set Filters

- Click on ‘3 Select time, filters …’
- Scroll screen down to the ‘Add Filter’ area
- Use pull-down menu ‘Select an Attribute’ to select field
- Use ‘show only’ pull down to select the filter condition
  - Show only – select when field has given values
  - Exclude – Exclude when field has given values
  - Values that are null – select when field was blank
  - Values are not null – select when field has a value
- Select attribute values
  - Click ‘Select attribute values…’ to see a list of possible values
  - Select a value and click ‘OK’ then ‘Add’
  - You can also enter your own value by clicking ‘Manually enter a value…’
Ad Hoc Reports – Step 3: Set Filters (cont.)

- To filter by a metric, click ‘Metric filter’
- Follow the same steps as with filtering by attribute, but manually enter a numeric filter condition
- Click the checkbox below that says ‘Apply this filter to granular data…’ if you want to apply the filter to every CAR in the report, rather than the summary data
Ad Hoc Reports – Step 3: Set Filters (cont.)

- After you add a filter it appears in the ‘Report Filters box’
- Click the ‘X’ box to delete a filter
- Click ‘Advanced’ at the top right to view additional options such as AND and OR operators

- You can filter by any field, not just the ones you chose for output. Click on ‘Select other attributes…’ in the ‘Add filter’ box
Ad Hoc Reports – Step 3: Set Filters (cont.)

- Select type of attribute
- Select condition
- Select value “W9126G”
- Click “Add”

Value will display under “Report Filters”
Ad Hoc Reports – Step 4: Layout/Setup

- Review filters
- Save your report
- Click ‘execute’
Ad Hoc Reports – Step 4: Layout/Setup (cont.)

- Select “Formatting” tab
- Change “display label”, if desired
- Click “Save”
- Click “Execute”
Ad Hoc Reports – Step 5: Date Range

- Date Signed
  - Based on when the contract was signed

- Last Modified Date
  - Based on when the contract was last modified. Ignores the contract signed date
  - 5-year maximum
Click box under “Report Prompts Summary”
Add date range under “Set Attribute Filters”
Click “Display Report”
Exporting to Excel…

- All report results can be exported to Excel for easier analysis

For standard and ad hoc reports, click the “Export” button, select options in the form that drops down, then click “export” again.

For EZSearch, click the “CSV” button.
Open the file in Excel and create a pivot table.

To create a pivot table, select all the data and click on pivot table, which is under the “insert” tab.
You can then create your own tables using the raw FPDS data. Pivot tables are a very powerful tool, but effective use of them will take some practice. For a tutorial, click here.
Conclusion…

- FPDS provides efficiencies to your firm’s business development by concentrating on who buys what you sell.

- Valuable information can be garnered to create future teaming opportunities, how to keep your pencil sharp, and the potential of providing a leading edge over your competitors for future work.
Questions…

- Contact your local PTAC for continuing education
- OR -
- Email Melea Crouse or call 469-487-7105 for general questions