



2023

DEPARTMENT OF DEFENSE

PROCURE-TO-PAY

& Financial Audit Training Symposium

Using Standard/Ad Hoc Reports in SAM Data Bank Basic

Presented by: Jovanka Caton, Brian Davidson

Register in LOGIN.GOV

- Create Account Using Government Email Address
- Select Language (English, Spanish, French)
- Send Request
- Respond to Sent Email to Confirm Email Address
- Create Password
- Setup Authentication - Government Employee ID (CAC)
- Sign-in with Your Government Employee ID(CAC)



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FPDS via LOGIN.GOV

- Now you can Login to FPDS using LOGIN.GOV
- Do not Enter Email Address and Password
- Scroll and Click - Sign in with Government Employee ID
- Click - Insert your PIV/CAC
- Select the Certificate Shown and Click - OK
- Email Address in Login.gov Matches FPDS User IDs with Same Email Address
- Select User ID (if more than one)



FPDS is using Login.gov to allow you to sign in to your account safely and securely.

Email address

Password

Show password

[Sign in](#)

First time using Login.gov?

[Create an account](#)

[Sign in with your government employee ID](#)



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Register in LOGIN.GOV

If CAC Email Changes - i.e. @mail.mil to @army.mil

- May Need to Delete Login.gov with Old Email
- Register Again in Login.gov with New CAC Email
- Adding a Second Email to Login.gov May Work Temporarily
- Safer to Delete Old Email and Register with New Email



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SAM.gov Background

- FPDS Reports Are in SAM Databank (since 3/16/2020)
 - Static Reports
 - Standard Reports
 - Administrative Reports (must request admin user role)
 - Ad Hoc Reports
- ezSearch remains in FPDS for now
- No User Roles Required to Run Most Reports
- Contract Data Admin Role
 - Needed for Administrative Reports and FAADC Access



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SAM.gov Background

- Direct Web Access - <https://sam.gov>
- FPDS database is Not Connected to SAM Reports
- FAADC database is Not Connected to SAM Reports
- Daily FPDS Add/Correct/Deletes Sent to SAM
- Daily FAADC Add/Correct/Deletes Sent to SAM
- Must Refresh SAM database with Current data
 - Usually Completed by 9:00 AM ET



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SAM.gov Background - Data Refresh

WARNING - SAM Data Refresh May Process Longer

- **ALWAYS** Check SYSTEM ALERTS Prior to Executing a Report or Getting Output from a Scheduled Report
- When Data REFRESH IS NOT COMPLETE
 - Report Results Will Have Numbers Too High or Too Low
 - **DO NOT USE REPORTS**
 - **Scheduled Reports** Will Also Be Inaccurate

March 8th SAM.gov Emails Not Malicious Show Details
Mar 9, 2023

Entity Validation Processing Show Details
Mar 28, 2023

See All Alerts

System Alerts

All All All

Sort by Published date (most recent first)

Active
 Expired

Click – SEE ALL ALERTS – SYSTEM ALERTS (upper right)



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Data Refresh - System Alerts

- Turn On ACTIVE and EXPIRED Alerts
- Scroll through Recent Alerts – Look for:

 Warning

Contract Data Reports Update Not Completed

The nightly update for contract data reports has not yet completed. As a result, report data is not refreshed to include most recent data. We will remove this notice when the update has completed and reports are refreshed.

Published Date: Jan 03, 2023

End Date: Jan 03, 2023

Status: Expired



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SAM.gov Background

- If SAM.gov is not Working Properly
 - Keeps Returning to the Login Screen
 - System Could be Down – Wait and Try Later
- Problems Keep Repeating
 - Go in Browser to Get to Settings
 - In Chrome Go to Privacy and Security
 - Clear Browsing Data - All History for All Time



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Four DATA BANK Report Types

- Sign in to SAM.gov
- Land on WORKSPACE with Your Profile
- Click - DATA BANK
- Click - CONTRACT DATA
- Click – Radio Button under Report Types
 - Static
 - Standard and/or Administrative (needs admin user role)
 - Ad Hoc Reports

The screenshot shows the SAM.gov website interface. At the top, the SAM.GOV logo is on the left, and 'Requests | Notifications' is on the right. The navigation menu includes 'Home', 'Search', 'Data Bank' (highlighted with a blue box and a red arrow), 'Data Services', and 'Help'. Below the navigation, there is a 'Show Reports For' section with a list of report categories: 'Assistance Listings', 'Contract Opportunities', 'Contract Data' (highlighted with a red arrow), 'Entity Information', and 'Federal Hierarchy'. To the right of this list is a 'Report Type' section with four radio buttons: 'Static', 'Standard' (selected with a blue dot and a red arrow), 'Administrative', and 'Ad Hoc'. On the right side of the page, there is a 'Data Bank' section with a 'Reports' button and a 'Subscriptions' button. Below this, there is a 'Contract Data Reports' section with an information icon and a text box stating: 'Attention: The FPDS reports module is now in SAM.gov as the DataBank. If you need to search for contract specific contracts, please go to [FPDS.gov](https://www.fpds.gov) and use the ezSearch tool. The FPDS search and data entry have not yet been migrated to SAM.gov, but will be migrated in the future.'



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Standard Reports - Data Bank, Contract Data

FPDS Standard Reports

- Predetermined Additional Filter Criteria for Reports
- Same Filters and Run on the Same Day = Same Results
- Drill Down to Display Additional Field Columns
- SORT GRID to Sort on Multiple Fields
- Execute Report to Run on a Schedule (Daily, Weekly)
- Export Results to Desktop as EXCEL, CSV, HTML, Text File
- Print Results by Exporting PDF to Desktop and Print
- Email Results through SAM.gov to non-SAM users



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Standard Reports - Data Bank, Contract Data

- Sign in to SAM.gov
- Land on WORKSPACE with Your Profile
- Click - DATA BANK
- Click - CONTRACT DATA
- Click – Radio Button for STANDARD REPORTS
- Scroll to the 37 Standard Report Names
 - 10 Report Names per Page – Four Pages of Report Names
- Click on Report Name to Open Criteria and Execute

The screenshot shows the SAM.gov Data Bank interface. At the top, there is a navigation bar with 'AM.GOV' and links for 'Requests', 'Notifications', 'Workspace', and 'Sign Out'. Below this is a search bar and a menu with 'Data Bank', 'Data Services', and 'Help'. The 'Data Bank' section is active, showing a 'Show Reports For' dropdown menu with options: 'Assistance Listings', 'Contract Opportunities', 'Contract Data' (selected), 'Entity Information', and 'Federal Hierarchy'. Below this is a 'Report Type' section with radio buttons for 'Static', 'Standard' (selected), 'Administrative', and 'Ad Hoc', and a checkbox for 'Favorites'. On the right, there are buttons for 'Reports', 'Subscriptions', and 'History List'. The 'Data Bank' section contains an introductory paragraph and a 'Contract Data Reports' section with an attention icon and text: 'Attention: The FPDS reports module is now in SAM.gov as the DataBank. If you need to search for contract data or specific contracts, please go to FPDS.gov and use the ezSearch tool. The FPDS search and data entry functions have not yet been migrated to SAM.gov, but will be migrated in the future.' Below this is a paragraph about public reports and a 'Standard Reports' section. A 'How does the Unique Entity ID appear in the contract data standard reports?' section follows, with a link to 'What happened to the DUNS number?'. At the bottom, there is a pagination bar showing 'Showing 1-10 of 37 reports' and a navigation bar with '1 2 3 4 Next >'. Below the pagination are two report cards: 'Awards by Contractor Type' and 'Bundled and Consolidated Contracts', each with a 'Saved Criteria' button and a plus sign.



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Standard Report – Report Criteria

- Date Range From and To Dates
 - Corresponds to Date Signed on Procurement Awards
- Organization
 - Defaults to Your SAM.gov User Profile (gray background)
 - Click - X at End of Your Organization to Remove
 - Results in All Federal Government Data for Date Range
 - Covers Dept Code, Agency Code, Command Code and Office Code
- Contracting Office Region – non-DOD Field

[Back to: Standard Reports](#)

Awards by Contractor Type

Description +

Report Criteria -

Date range correspond to the Date Signed on Procurement Awards

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

Organization

...

97AS - DEFENSE LOGISTICS AGENCY (DLA) Sub-Tier x

Contracting Office Region

Tips for selecting organizations:
Only choose organizations that are at the same level in the hierarchy (e.g. department, sub-tier, major command, office).

[Execute](#) [Save](#) [Clear](#) [PDF Export](#)



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Standard Report Criteria - Organization

- Organization
 - Can Enter a Maximum of 20 values
- 4 Types of Organization Codes
 - Department Code - i.e. 9700 = DOD; 4700 = GSA; 7000 = DHS
 - Agency Code - i.e. 5700 = AF; 2100 = Army; 97AE = DARPA
 - Command Code - i.e. AMC, NGB, NAVSEA, AFMC
 - Office Code - i.e. FA8609, W31P4Q, N00019, SPE300
- Realize How 20 Values Are Evaluated
- Use Same Org Code Type or Use 2 – 4 Org Code Types

Federal Hierarchy

Filter By

Department/Ind. Agency
9700 DHS

Sub-Tier
5700 DEPT OF THE AIR FORCE

Major Command
5700 AFMC

Sub Command
Enter Code or Name

Office
5700 FA8609 AFLCMC WLCK KC46

Show Inactive

Selected Values (0) Clear all

Code	Name	Level
<input type="checkbox"/> FA8609	FA8609 AFLCMC WLCK KC46	Office

Cancel Select



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Standard Report Criteria - Organization

- Organization Example
- Enter 9700; 4700 (Department Codes)
- Enter 97AE; 2100 (Agency Code)
- Enter NGB; NAVAIR (Command Codes)
- Enter FA8609; N00019 (Office Codes)
- Asking For DOD and GSA, then DARPA and Army
- Asking For NGB and NAVAIR and 2 DODAACS



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Standard Report Criteria - Organization

- Go to the Lowest Level DODAAC
- DODAAC must equal FA8609 or N00019

AND

- Command must be NAVAIR or NGB
- FAIL – NO DATA for FA8609 is not in NAVAIR or NGB

AND

- Agency Code Must be Army(2100) or DARPA(97AE)
- FAIL – NO DATA for N00019 is not in Army or DARPA



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Standard Report Criteria - Organization

AND

- Department Code must be DOD or GSA
- We Never got to Department Level Evaluation
- Two Conclusions
- ONE - Enter All Values at Only One Level
 - Enter only Dept Codes and No Other Data Level
 - Enter only Agency Codes and No Other Data Level
 - Enter only Command Codes and No Other Data Level
 - Enter only Office Codes and No Other Data Level



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Standard Report Criteria - Organization

- TWO - Lowest Level Entered Must Match One Value
At **Every** Higher Level Entered
- Example:
((DODAC = Value1 OR Value2)
AND (COMMAND = Value1 OR Value2)
AND (AGENCY = Value1 OR Value2)
AND (DEPARTMENT = Value1 OR VALUE2))
- N00019, NAVAIR, 1700, 9700 - All 4 Values Must Be Present in
Organization to get Results for N00019



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Standard Report Criteria - Organization

GOOD DATA Combination Examples:

- DODAAC - N00019, W31P4Q, FA8609,
- Command - AMC, AFMC, NGB, NAVAIR, NAVSEA
- Agency - 1700, 2100, 5700 , 97AE, 97AS
- Department - 4700, 7000, 9700
- N00019 -> NAVAIR -> 1700 -> 9700 - Good Combo
- FA8609 -> AFMC -> 5700 -> 9700 - Good Combo
- W31P4Q -> AMC -> 2100 -> 9700 – Good Combo



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Standard Report Criteria - Organization

- NO DATA from
- Command – NAVSEA (No NAVSEA DODAAC)
- Agency - 97AE, 97AS (No DODAACs for DARPA or DLA)
- Department – 4700, 7000 (No Office Code in GSA, DHS)



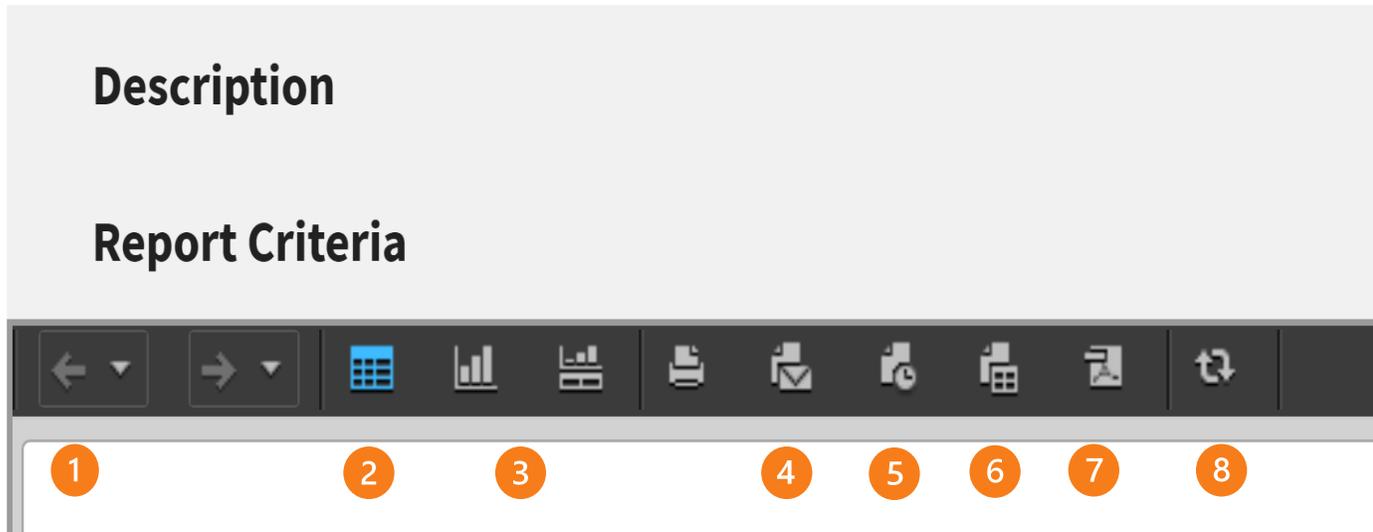
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Commands for Standard Report After Execution

Back to: [Standard Reports](#)

Federal Contract Actions and Dollars



1. Go Back
2. Display Data Grid
3. Create Graph or graph with Data
4. Email Report
5. Schedule Report to Run Automatically
6. Export Report to EXCEL, CSV, txt File
7. Export Report to PDF
8. Refresh Data



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Standard Reports - Data Output

Drill to Reveal More Fields

The screenshot shows a software interface with a table. A context menu is open over the 'Total Dollars' column heading. The menu includes options: 'Drill', 'Sort', and 'Sort Grid...'. A list of fields to be added is shown, with 'Fiscal Year' and 'Major Command Code' highlighted by orange circles. The table data is as follows:

Department Name	Department	Total Dollars	% Total Actions	% Total Dollars
DEPT OF DEFENSE	9700		100.0000%	100.0000%
Total			100.0000%	100.0000%

1. Right Click Column Heading

2. Mouse Over DRILL

3. Select One Field to Appear Next in Report

4. Repeat for Additional Fields to Appear



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Standard Reports - Drilling

- Mouse Position is Critical Before Right Mouse Click
 - Drill from a Column Header and All Data in Report Stays
 - Drill from a Data Row - Only Data For the Row Stays
- 15 Additional Fields Can Be Added in Drill Process
 - Limited to 150,000 Rows of Data Output
 - Exceed 150,000 Rows - There is No Warning of Lost Data
 - Make Sure Adding a Field Will Not Lose Data
- Last Drill Feature - Award Detail (150,000 Row Limit)
 - Get All Records with the Majority of Fields Behind Report



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Standard Reports – Drilling Limitations

Can Drill to Award Detail
When < 150,000 Rows

Report Criteria

« 1 2 3 4 5 of 6 pages » Data rows: 1 - 50 of 257

Department Name	Department ID	Fiscal Year	Contracting Agency ID	Total Actions	Total Dollars	% Total Actions	% Total Dollars
DEPT OF DEFENSE	9700	2023	9700	33	\$46,019,569.75	0.0000%	0.0013%
DEPT OF DEFENSE	9700	2023	9700	53	\$102,301,942.48	0.0000%	0.0028%
DEPT OF DEFENSE	9700	2023	9700	105	\$9,556,384.13	0.0000%	0.0003%
DEPT OF DEFENSE	9700	2023	9700	152	\$34,541,688.16	0.0000%	0.0009%
DEPT OF DEFENSE	9700	2023	9700	182	\$568,836,012.17	0.0000%	0.0155%
DEPT OF DEFENSE	9700	2023	9700	185	\$103,069,910.60	0.0001%	0.0028%
DEPT OF DEFENSE	9700	2023	9700	268	\$386,659,910.80	0.0001%	0.0106%
DEPT OF DEFENSE	9700	2023	9700	485	\$279,423,758.29	0.0001%	0.0076%
DEPT OF DEFENSE	9700	2023	9700	579	\$441,775,281.23	0.0002%	0.0121%
DEPT OF DEFENSE	9700	2023	9700	723	\$161,236,030.95	0.0002%	0.0044%
DEPT OF DEFENSE	9700	2023	97AE	812	\$735,676,889.60	0.0002%	0.0201%
DEPT OF DEFENSE	9700	2023	97F5	1,533	\$801,765,941.30	0.0004%	0.0219%
DEPT OF DEFENSE	9700	2023	97JC	1,921	\$4,612,717,691.05	0.0005%	0.1261%
DEPT OF DEFENSE	9700	2023	97AZ	1,954	\$179,329,514.12	0.0005%	0.0049%
DEPT OF DEFENSE	9700	2023	97ZS	2,784	\$1,820,382,849.17	0.0008%	0.0498%
DEPT OF DEFENSE	9700	2023	97DH	3,790	\$12,670,013,384.54	0.0010%	0.3463%
DEPT OF DEFENSE	9700	2023	9763	6,779	\$1,168,525,261.26	0.0018%	0.0319%
DEPT OF DEFENSE	9700	2023	97AK	27,979	\$2,823,085,770.40	0.0076%	0.0772%
DEPT OF DEFENSE	9700	2023	5700	43,410	\$43,571,887,877.60	0.0118%	1.1909%
DEPT OF DEFENSE	9700	2023	2100	64,427	\$39,853,548,897.86	0.0175%	1.0893%
DEPT OF DEFENSE	9700	2023	1700	93,777	\$69,156,253,686.49	0.0254%	1.8902%
DEPT OF DEFENSE	9700	2023	97AS	1,795,692	\$20,475,989,756.67	0.4871%	0.5596%

Cannot Drill to Award
Detail with 1,795,692
Rows



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Static Reports - Data Bank, Contract Data

Static Reports

- Current National Interest Reports are Run Daily
- Official Standard Reports 'Frozen' in Time
- Small Business Goaling Reports by Fiscal Year
- Top 100 Contractor Reports by Fiscal Year by Agency
- Procurement Reports by FY, Agency, Geographic Location
- Most are PDF format Created as Official for A Fiscal Year



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Administrative - Data Bank, Contract Data

Administrative Reports

- SAM User Needs Contracts Admin Role to Run Report
- Must Ask Existing Admin User to Assign Role to You

4 Administrative Reports Run in Real Time

- Audit Procedures - Uses Live Data
- FPDS Contracting Office - **Uses Live Data**
- List of FPDS Users - **Uses Live Data**
- Status of Actions – **Uses Live Data**

4 Administrative Reports Updated Once per Day

- Individual Data Item Oversight Tracker
- Rerepresentation
- Rerepresentation Eligible Actions
- Transfer Action



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Ad Hoc Reports - Data Bank, Contract Data

- Custom Report - Your Filters and Your Field Selection
- Save Report for Future Execution
- Share Report Code with Other SAM.gov Users
- Data Summarization Occurs when All Field Values Shown Have Same Value for Multiple Records
- Must Know Fields and Relationship Between Fields
- Must Test Report Results for Accuracy
- You Are Your own Programmer - Check Your Work



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Ad Hoc Reports – Data Bank, Contract Data

- Sign in to SAM.gov
- Land on WORKSPACE with Your Profile
- Click DATA BANK
- Click CONTRACT DATA
- Click Report Type - Ad Hoc
- Choose 1 of 3 Databases to Access
 - Award/IDV Information Report - FPDS
 - Financial Assistance Award Data Collection (FAADC) Report - FAADC
 - Other Transaction Information Report – OT's

Report Type

- Static
- Standard
- Administrative
- Ad Hoc

i Attention: The FPDS reports module is now in SAM.gov as the DataBank. If you need to search for contract data or specific contracts, please go to [FPDS.gov](https://www.fpds.gov) and use the ezSearch tool. The FPDS search and data entry functions have not yet been migrated to SAM.gov, but will be migrated in the future.

Many reports on acquisition awards are available to the public. These reports provide detailed information on awarded contracts and associated modifications. Reports can assist with analysis of federal spending and provide data by federal organization, geographical area, business demographics, and product or service type, among others.

Ad Hoc Reports

Ad hoc reports offer the ability to select specific fields from the data to create a customized report. Ad hoc reports are most informative for those with both knowledge of the data fields and an understanding of advanced reporting tools. You can pull up to 12 years and 150,000 rows of data in a single report. If you are interested in learning how to do ad hoc reporting, please see the [contract data landing page](#).

How does the Unique Entity ID appear in contract data ad hoc reports?

DUNS fields have been renamed, and Unique Entity ID fields have been introduced.

[What are the columns BLANK 1 \(DEPRECATED\) and BLANK 2 \(DEPRECATED\) in contract data ad hoc reports?](#)

Showing 1-2 of 2 reports

[Award/IDV Information Report](#)

Construct a report of contract award data.

[Financial Assistance Award Data Collection \(FAADC\) Report](#)

Construct a report of financial assistance award data.

[Other Transaction Information Report](#)

Construct a report of other transaction data.



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Ad Hoc Reports – Data Bank, Contract Data

Ad Hoc – My Reports Page

1 Award IDV Information > My Reports

Name	Owner	Modified
??BAD REPORT Data 2022		1/30/23 9:37:11 AM
0000logcapORDER0002		10/26/22 10:38:22 AM
000FILTERING NOT-EQUAL		1/30/23 9:37:49 AM
000MERAtestFunding Office vs Co...		5/4/22 9:23:23 PM
000NAVWARcalYEAR		5/4/22 9:26:39 PM
000SBIRNOT		5/12/22 4:41:33 PM

1. Database Selected

2. Your Saved Reports
- Double Click on Name to Run Report
 - Right Click on Name For Additional Menu Options

3. Change Sort Order Click on Any Column

4. Click Create to Start New Report



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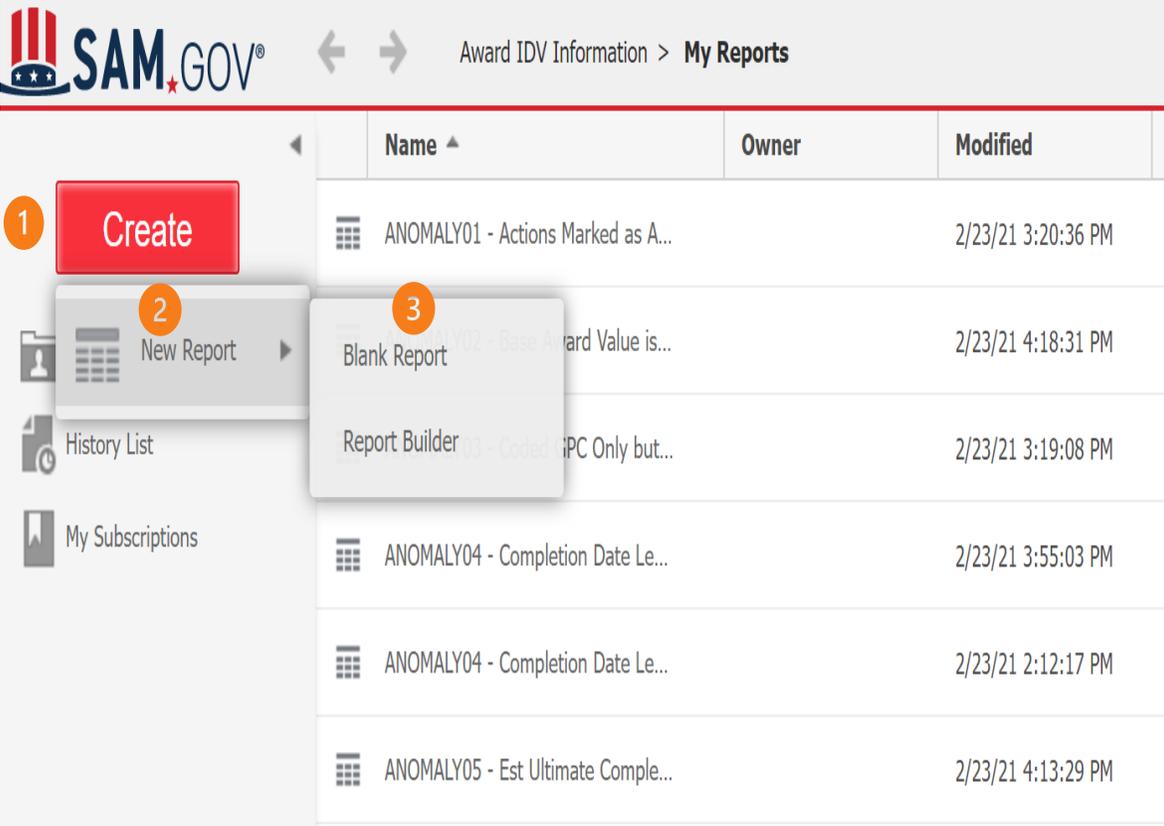
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Ad Hoc Reports – New Report

1. Click - CREATE (red)
2. Click - NEW REPORT
3. Click - BLANK REPORT

Recommend not Using Report Builder

- Too Restrictive



Award IDV Information > My Reports

Name	Owner	Modified
ANOMALY01 - Actions Marked as A...		2/23/21 3:20:36 PM
ANOMALY02 - Base Award Value is...		2/23/21 4:18:31 PM
ANOMALY03 - Coded CPC Only but...		2/23/21 3:19:08 PM
ANOMALY04 - Completion Date Le...		2/23/21 3:55:03 PM
ANOMALY04 - Completion Date Le...		2/23/21 2:12:17 PM
ANOMALY05 - Est Ultimate Comple...		2/23/21 4:13:29 PM



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Ad Hoc Reports – New Report

1. Enter Start and End Dates for Date Signed
 - Use One Recent FY to Create Draft Report
 - Maximum 12 Years for a Start/End Date Range
2. No Dates Needed for Last Modified Date Range
3. Go to Bottom Left Corner; Click - Edit in Design Mode

← ↻ <https://sam.gov/ADC/servlet/mstrWeb>

SAM.GOV ← → Award IDV Information > My Reports > DAR - K

INDEX X

Summary of your selections

1 Start Date for Date Signed ✓

2 End Date for Date Signed 1

3 Start Date for Last Modified Date

4 End Date for Last Modified Date

1. Start Date for Date Signed (Required)

Please Enter a Start Date for Date Signed

This prompt requires a value between 9/30/2011 and 9/30/2023.

10/1/2019

2. End Date for Date Signed (Required)

Please Enter an End Date for Date Signed

This prompt requires a value between 10/1/2019 and 10/1/2031.

9/30/2023

2 3. Start Date for Last Modified Date

Please Enter a Start Date for Last Modified Date

3 4. End Date for Last Modified Date

Please Enter an End Date for Last Modified Date

Report Message Name: Enter Report Name Here

Run Report



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Ad Hoc Reports – Design Mode (or edit)

Design Mode - Four Screen Areas

1. ALL OBJECTS - All Fields Available to make a Report
2. REPORT FILTER – What Data is Selected for Report
 - Initially Only the Date Signed Start/End Range is the Filter
 - Without Adding A Filter, You Get All the Data for Date Range
3. OUTPUT GRID - 4 Boxes Are Field & Column Names
4. PAGE BY is an Advanced Feature - Do Not Use Initially

The screenshot shows the SAM.GOV interface in Design Mode for a report. The breadcrumb navigation at the top reads "Award IDV Information > My Reports > Design Mode: Blank Report". The interface is divided into several sections:

- ALL OBJECTS:** A sidebar on the left containing a dropdown menu set to "Award IDV Information" and a search icon. Below this are two folders: "Public Objects" (marked with a red circle '1') and "Schema Objects".
- REPORT FILTER:** A section with a "Reprompt" icon and a filter rule: "Date Signed (ID) Between '10/1/2021' AND '9/30/2022'" (marked with a red circle '2'). Below the filter is an "AND" link and a prompt: "Unanswered Prompt: Start Date for Last Modified Date, End Date for Last Modified Date".
- PAGE-BY:** A section with the value "none" (marked with a red circle '4').
- Output Grid:** A 2x2 grid of boxes for adding data:
 - Top-right: "Drop objects here to add columns" (marked with a red circle '3') with a search icon.
 - Bottom-left: "Drop objects here to add rows" with a search icon.
 - Bottom-right: "Drop Metrics here to add data" with a search icon.



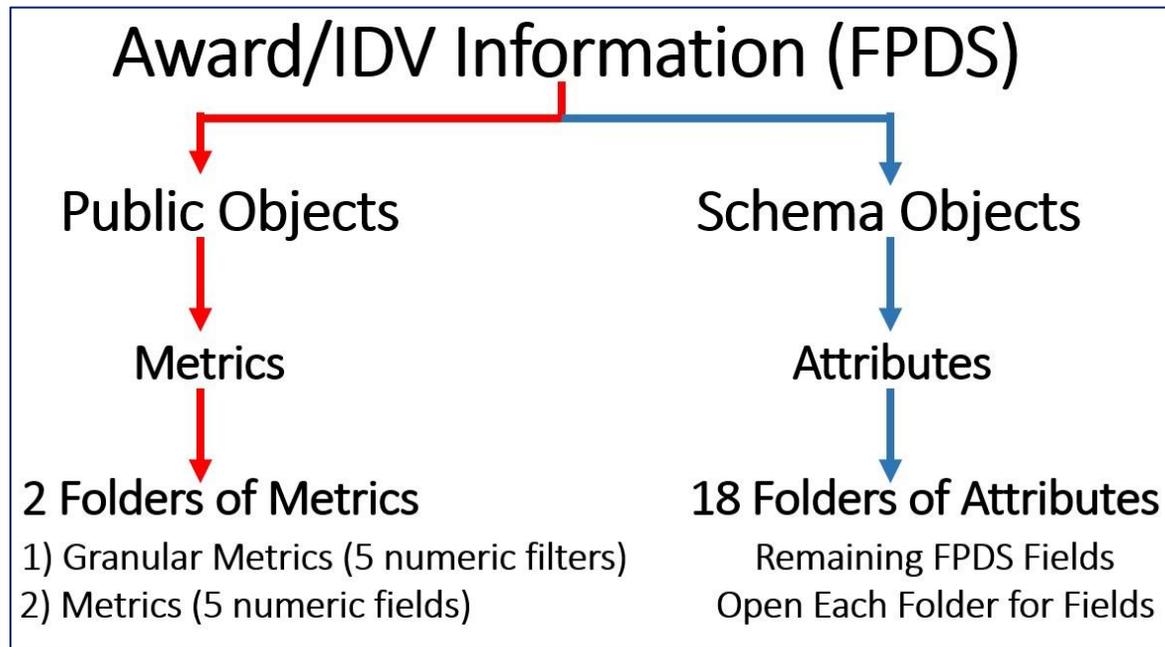
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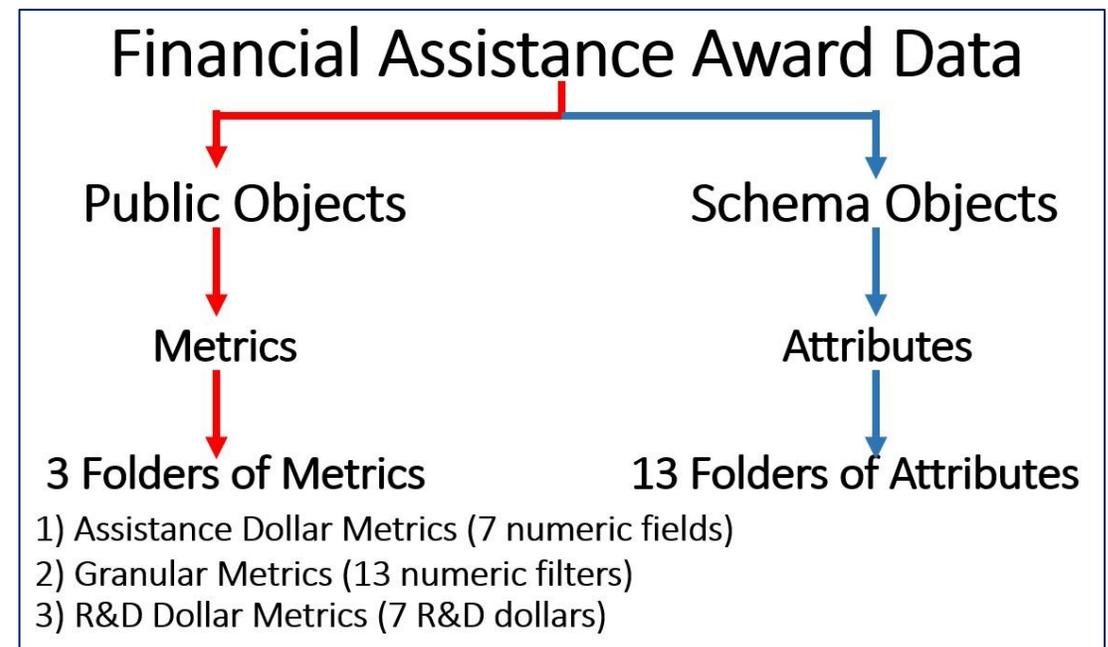
Ad Hoc Reports – Design Mode (or edit)

ALL OBJECTS Divided into 2 Groups – **Public Objects** Metrics (all numeric Fields) **Schema Objects** Attributes (all non-numeric Fields)

FPDS Tree Structure



FAADC Tree Structure



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Ad Hoc Reports – Design Mode (or edit)

- FAADC Can Access 2 Different Data Types
 - Draft Records and Final Records
- At CREATE Step a Decision for Draft or Final is Made
 - Along with Blank Report vs. Report Builder (never use)
 - Select either Draft Blank Report or Final Blank Report
- Draft Report Cannot Change to See Final Data
- Final Report Cannot Change to See Draft Data
- A New Report Must Be Created to Switch Data Types



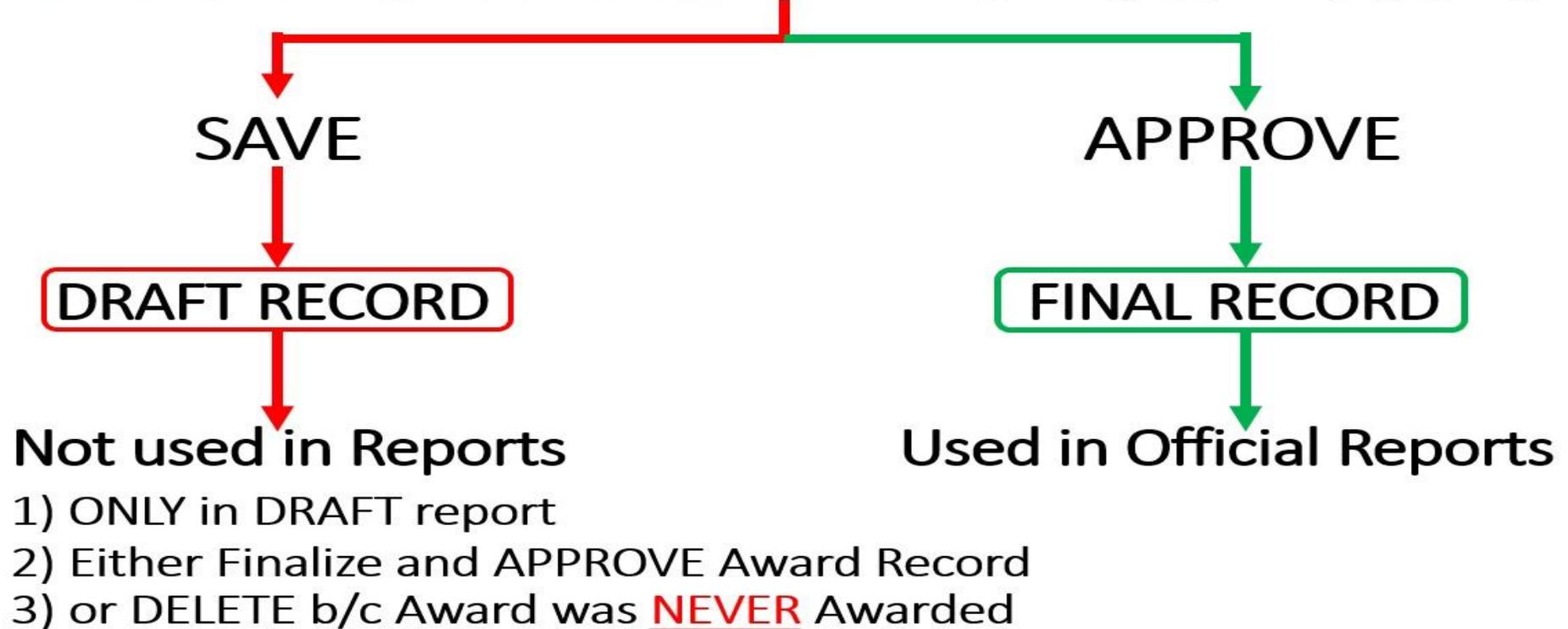
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Ad Hoc Reports – Design Mode (or edit)

Draft vs. Final Records in FAADC

DRAFT vs. FINAL FAADC Data Record

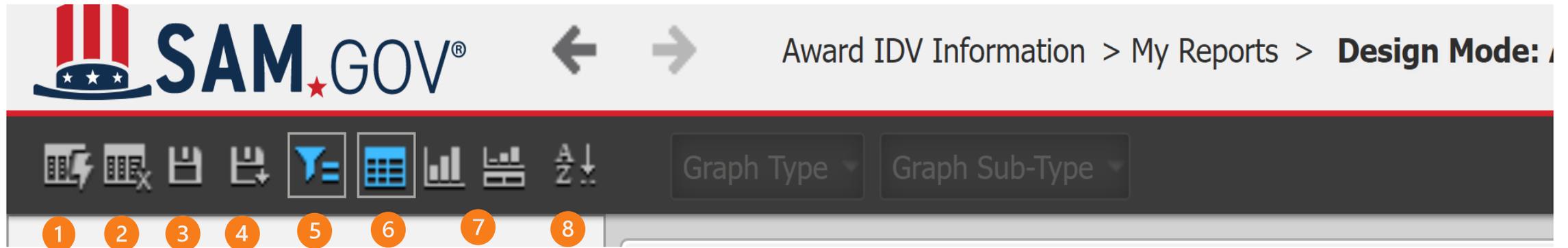


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Ad Hoc Report - Design Mode(edit)

Design Mode Commands – Black Bar Command Icons



1. Run Report

2. Cancel Run

3. SAVE

4. SAVE AS (1st time)

5. Make Report Filter Disappear - DO NOT USE

6. Report is to Create a Data Grid

7. Report is to Create a Graph Or Graph With Data



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Ad Hoc Reports – New Report

- Click - CREATE (red)
- Click - NEW REPORT
- Click - BLANK REPORT
 - Never Use Report Builder (Too Restrictive)
- Enter Start and End Dates for Date Signed
 - Use One Recent FY to Create Start Drafting a Report
 - Maximum 12 Years for a Start/End Date Range
- No Dates Needed for Last Modified Date Range
 - Go to Bottom Left Corner; Click - Edit in Design Mode



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Ad Hoc Reports – Design Mode (or edit)

- Start Moving Fields to the Output Grid
- Suggest - Do Metrics First - Schema Objects -> Metrics
 - Must Select One Metric - suggest - Number of Actions
 - Number of Actions Show If More Than One Record is Behind a Given Row in the Report (value is not One)
 - Add from the Remaining Four Metrics, if needed.
- 3 Ways to Move Field from ALL OBJECTS to GRID
 - Double Click on Field Name – adds field to the far right
 - Right Click on Field Name and Choose ADD to GRID
 - Left Click and Hold on Field Name and Drag into GRID



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Ad Hoc Reports – Design Mode (or edit)

Left Click and Hold on Field Name and Drag into GRID

- Make sure Yellow Vertical Bar appears in the Grid

The screenshot shows the SAM.GOV interface in Design Mode. The breadcrumb trail is "Award IDV Information > My Reports > Design Mode: Blank Report". The interface includes a toolbar with various icons, a left sidebar for "ALL OBJECTS", a "REPORT FILTER" section, and a main grid area. The "ALL OBJECTS" sidebar lists several metrics, with "Base and All Options Value (Total Contract Value)" highlighted. The "REPORT FILTER" section shows a filter for "Date Signed (ID) Between '10/1/2021' AND '9/30/2022'" and an "AND" condition. The "PAGE-BY" section is set to "none". The main grid area has a header row with columns for "Metrics", "Number of Actions", and "Dollars Obligated". Below the header, there is a row with a search bar and a button labeled "Base and All Options Value (Total Contract Value)". A yellow vertical bar is visible on the right side of the grid. A dashed orange arrow points from the highlighted metric in the sidebar to the grid area.

ALL OBJECTS

Metrics

Base and All Options Value (Total Contract Value)

Base and Exercised Options Value

Dollars Obligated

Number of Actions

Number of Records

REPORT FILTER

Reprompt

Date Signed (ID) Between "10/1/2021" AND "9/30/2022"

AND

Unanswered Prompt: Start Date for Last Modified Date, End Date for Last Modified Date

PAGE-BY: none

Metrics	Number of Actions	Dollars Obligated
	<Number of Actions>	<Dollars Obligated>

Drop objects here to add rows

Base and All Options Value (Total Contract Value)



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Ad Hoc Reports – Design Mode (or edit)

SAM.GOV® Award IDV Information > My Reports > Design Mode: Blank Report

Graph Type Graph Sub-Type

ALL OBJECTS

Metrics

Award IDV Information

Public Objects

Metrics

Metrics

base and Exercised Options value

Dollars Obligated

Number of Actions

Number of Records

REPORT FILTER Reprompt

Date Signed (ID) Between "10/1/2021" AND "9/30/2022"

AND

Unanswered Prompt: Start Date for Last Modified Date, End Date for Last Modified Date

PAGE-BY: none

	Metrics	Number of Actions	Dollars Obligated
Drop objects here to add rows			
		<Number of Actions>	<Dollars Obligated>

- Go Up All Objects Data Tree to Get to Attributes
- Top Box Click Down Arrow - Click - Award IDV Info
- Click -> Schema Objects -> Attributes
- Open Folder (18) Where Desired Field Resides
- Move Attribute Field from ALL OBJECTS to GRID
 - Double Click on Field Name – adds field in front of Metrics
 - Right Click on Field Name and Click - ADD to GRID
 - Left Click and Hold on Field Name and Drag into GRID



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Ad Hoc Reports – Design Mode (or edit)

Get to Attributes by Going Up All Objects Data Tree

The image consists of three sequential screenshots of the SAM.GOV interface, illustrating the steps to reach the Attributes section in the All Objects data tree. Each screenshot is annotated with a blue callout box containing a number from 1 to 4.

- Step 1:** The first screenshot shows the 'ALL OBJECTS' data tree on the left. A callout box with the number '1' points to the 'Award IDV Information' item, which is highlighted in blue. A tooltip for 'Award IDV Information' is visible.
- Step 2:** The second screenshot shows the 'ALL OBJECTS' data tree. A callout box with the number '2' points to the 'Award IDV Information' item, which is now selected in the dropdown menu above the tree. The tree shows 'Public Objects' and 'Schema Objects' folders.
- Step 3:** The third screenshot shows the 'ALL OBJECTS' data tree. A callout box with the number '3' points to the 'Schema Objects' folder, which is now selected in the dropdown menu. The tree shows the 'Attributes' folder under 'Schema Objects'.
- Step 4:** The fourth screenshot shows the 'ALL OBJECTS' data tree. A callout box with the number '4' points to the 'Attributes' folder, which is now selected in the dropdown menu.



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Ad Hoc Reports – Design Mode (or edit)

Attribute Folders

- 18 Folders
- Learn Field Location
- Attributes on Top Bar
- Search 2nd Bar
 - Type Field Name
 - Click - Search icon
- Move Field to Grid

Click to expand folders

Search

ALL OBJECTS

Attributes

Business Size Selection

Competition Information

Contract Dates

Contract Identification

Contract Information

Contract Marketing Data

Department and Agency Information

FOUO

Funding Sources

Granular Level

Legislative Mandates

Principal Place of Performance

Product or Service Information

Product Origin

Referenced IDV Information

Transaction Information

Vendor Information

Vendor Socio-Economic Data

Date S

AND

Last M

AND

DOD

OR

DOD

PAGE-BY:

Business Size

Dates

Contract ID/Info

Who Awarded

Who Funded

Bundled, PSC, NAICS

Prepared, Approved, Closed

Entity Info



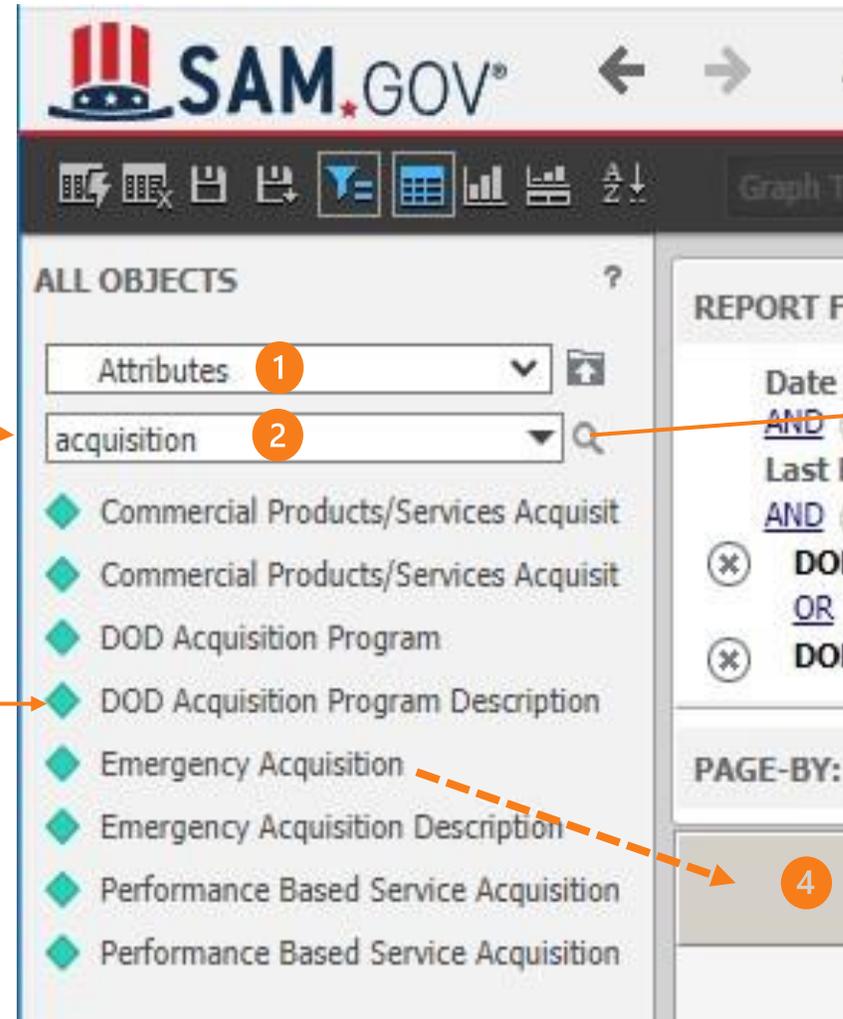
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Ad Hoc Reports – Design Mode (or edit)

Search Attribute Folders for Field

1. First Bar
 - Ensure Attributes is selected
2. Second Bar
 - Type Part of Field Name
 - Click Magnifying Glass to run search
3. Diamonds are attributes search results
4. Select to Move to GRID
 - Double Click - Field Name
 - Right Click - ADD to GRID
 - Left Click - Drag into GRID



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Ad Hoc Reports – Design Mode (or edit)

- Output Grid – DO SAVE or SAVE AS (first time)
- Start with small number of Fields for Draft Report
- Now Add Report Filter and Test If Filters Get Data

Report Filter – Only Dates

Contracting Agency ID	Major Command Code	Sub Command1 Code	Contracting Office ID	Funding Agency ID	Funding Office ID	Referenced IDV PIID	PIID	Modification Number	Date Signed	Metrics	Number of Actions	Dollars Obligated
<Contracting Agency ID>	<Major Command Code>	<Sub Command1 Code>	<Contracting Office ID>	<Funding Agency ID>	<Funding Office ID>	<Referenced IDV PIID>	<PIID>	<Modification Number>	<Date Signed>		<Number of Actions>	<Dollars Obligated>

Output Grid – Fields and Column Headings



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Ad Hoc Reports – Design Mode (or edit)

- Go Up All Objects Data Tree to get to Attributes
- Top Box Click Down Arrow – Click - Award IDV Info
- Click -> Schema Objects -> Attributes
- Open Folder (18) Where Desired Field Resides
- Move Field from ALL OBJECTS to REPORT FILTER
 - Right Click on Field Name and Click - ADD to Filter
 - Left Click and Hold on Field Name and Drag to Report Filter
 - Release with Yellow Line Box Around Report Filter



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Ad Hoc Reports – Design Mode (or edit)

Left Click and Hold on Field Name and Drag to Filter

Or Right Click on Field Name and Click - ADD to Filter

The screenshot shows the SAM.GOV interface in Design Mode. The breadcrumb trail is "Award IDV Information > My Reports > Design Mode: Blank Report". The "ALL OBJECTS" list on the left includes "Contracting Office ID", which is highlighted with a dashed orange box. An orange arrow points from this box to the "REPORT FILTER" section, where "Contracting Office ID" is already listed as a filter criterion. The filter text is "Date Signed (ID) Between '10/1/2021' AND '9/30/2022'". Below the filter, the "PAGE-BY" is set to "none". A table with columns "Metrics", "Number of Actions", and "Dollars Obligated" is visible, with a search bar below it.

The screenshot shows the SAM.GOV interface in Design Mode. The breadcrumb trail is "Award IDV Information > My Reports > Design Mode: 000NAVWAR - FULL NA". The "ALL OBJECTS" list on the left includes "Contracting Office ID", which is highlighted with a solid orange box. A black button with the text "Add to Filter" is overlaid on this box. The "REPORT FILTER" section shows a filter for "Date Signed (ID) Between '10/1/2021' AND '9/30/2022'". Below the filter, the "PAGE-BY" is set to "none". A table with columns "Contracting Agency ID", "Major Command Code", "Sub Command1 Code", and "Contracting O" is visible.



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Ad Hoc Reports – Design Mode (or edit)

REPORT FILTER

1. Click - Qualify
2. Select Operator
3. Type Data Value
4. Click - Apply

Award IDV Information > My Reports > Design Mode: 000NAVWAR - FULL NAMES

Graph Type | Graph Sub-Type

REPORT FILTER Reprompt

Date Signed (ID) Between "10/1/2021" AND "9/30/2022" ?
AND →
Unanswered Prompt: Start Date for Last Modified Date, End Date for Last Modified Date ↓
AND →

Contracting Office ID 1 Qualify ? ID 2 3 4

Select » Select Attribute...

PAGE-BY: none

Contracting Agency ID	Major Command Code	Contracting Office ID	Funding Agency ID	Funding Office ID	R
<Contracting Agency ID>	<Major Command Code>	<Contracting Office ID>	<Funding Agency ID>	<Funding Office ID>	<R>

- Equals
- Does not equal
- Greater than
- Greater than or equal to
- Less than
- Less than or equal to
- Between (enter value1;value2)
- Not between (enter value1;value2)
- Contains
- Does not contain
- Begins with
- Does not begin with
- Ends with
- Does not end with
- Like
- Not Like
- Is Null
- Is Not Null
- In (enter value1;value2; ...;valueN)
- Not In (enter value1;value2; ...;valueN)



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Ad Hoc Reports – Design Mode (or edit)

REPORT FILTER

Award IDV Information > My Reports > Design Mode: 000NAVWAR - FULL NAMES

Graph Type - Graph Sub-Type -

REPORT FILTER Reprompt

Date Signed (ID) Between Shortcut to: Start Date for Date Signed AND Shortcut to: End Date for Date Signed
AND →

Last Modified Date (ID) Between Shortcut to: Start Date for Last Modified Date AND Shortcut to: End Date for Last Modified Date ↓

AND →

⊗ Contracting Office ID (ID) Equals "N00039" ↑

Cookie Crumbs to Return to different places

Filter Added

Edit again – Click blue text



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Ad Hoc Reports – Design Mode (or edit)

Award IDV Information > My Reports > Design Mode: 000NAVWAR - FULL NAMES

Graph Type - Graph Sub-Type -

REPORT FILTER Reprompt

Date Signed (ID) Between "10/1/2021" AND "9/30/2022"

AND

Unanswered Prompt: Start Date for Last Modified Date, End Date for Last Modified Date

AND

Contracting Office ID Qualify ID Equals

Select

PAGE-BY: none

Contracting Agency ID	Major Command Code	Contracting Office ID	Funding Agency ID	Funding Agency Name
<Contracting Agency ID>	<Major Command Code>	<Contracting Office ID>	<Funding Agency ID>	<Funding Agency Name>

- Equals
- Does not equal
- Greater than
- Greater than or equal to
- Less than
- Less than or equal to
- Between (enter value1;value2)
- Not between (enter value1;value2)
- Contains
- Does not contain
- Begins with
- Does not begin with
- Ends with
- Does not end with
- Like
- Not Like
- Is Null
- Is Not Null
- In (enter value1;value2; ...;valueN)
- Not In (enter value1;value2; ...;valueN)

Report Filters - Qualify vs Select buttons

• Qualify

- Means You Know the Value in the Database and Can Type it Accurately (i.e. DODAAC for Office ID)
- Type a Wrong Value and No Records are Returned

• Select

- Is Needed When You Do Not Know the Database Values
- Select Shows You Every Value for the Field
- You Select the Correct Value(s) to Use.



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Ad Hoc Reports – Design Mode (or edit)

Award IDV Information > My Reports > Design Mode: 000NAVWAR - FULL NAMES

Graph Type - Graph Sub-Type -

REPORT FILTER Reprompt

Date Signed (ID) Between "10/1/2021" AND "9/30/2022"

AND +

Unanswered Prompt: Start Date for Last Modified Date, End Date for Last Modified Date ↓

AND +

Contracting Office ID Qualify ?+ ID v Equals

Select Attribute...

PAGE-BY: none

Contracting Agency ID	Major Command Code	Funding Agency ID	Funding Office ID
<Contracting Agency ID>	<Major Command Code>	<Funding Agency ID>	<Funding Office ID>

Operator list (highlighted in orange):

- Equals
- Does not equal
- Greater than
- Greater than or equal to
- Less than
- Less than or equal to
- Between (enter value1;value2)
- Not between (enter value1;value2)
- Contains
- Does not contain
- Begins with
- Does not begin with
- Ends with
- Does not end with
- Like
- Not Like
- Is Null
- Is Not Null
- In (enter value1;value2; ...;valueN)
- Not In (enter value1;value2; ...;valueN)

Report Filter - Operators (20)

- 16 Operators Can Have Only One Data Value for the Field
- 4 Operators Allow More than One Value in a String
 - BETWEEN/NOT BETWEEN-Upper and Lower Value Limits(2)
 - IN/NOT IN – More than 1 Value Separated by Semicolon (;)
- How Many Values Can Be In a String (v1;v2;v3;v4;v5;...;vN)?
 - Tested 10,000 Office DODAACs and It Works
- Limit is a Software Buffer of approx. 8 kb (8,000 characters)
- Exceed Buffer Size and Get an Error
 - Solution is to Use a Second Report Filter Using IN operator



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Ad Hoc Reports – Design Mode (or edit)

Report Filters

- Multiple Filters Possible
- Each Are Joined with an **AND**
- Example:
 - Date Signed is between 10/01/2021 and 09/30/2022
 - AND** Contracting Agency ID = 1700
 - AND** Major Command Code in NAVSEA;NAVAIR;ONR;SSP
- NO SPACES are Allowed in the Data Value String
- Wrong Filter Combinations can Cause No Data Retrieved



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Ad Hoc Reports – Design Mode (or edit)

The screenshot shows a 'Save As' dialog box with the following elements:

- Save in:** My Reports
- Report List:** A list of 7 report templates, including 'ANOMALY01 - Actions Marked as A-76' through 'ANOMAI07 - Fair Opportunity is Null for BPA Calls'.
- Search Results:** '34 items found'. Name: Training Demo. Description: Training Demo.
- Buttons:** OK and Cancel.
- Options:** Keep report prompted. Advanced Options...
- Prompts:** Save report as static - Saved report will not be prompted when run. Save report as prompted. Only filter will be prompted. Only template will be prompted. Filter and template will be prompted. Set the current prompt answers to be the default prompt answers.

The screenshot shows a 'Report Saved' dialog box with the following elements:

- Message:** Training Demo has been saved successfully.
- Buttons:** Return to Design Mode and Run newly saved report.

SAVE AS – first time

- Save your work frequently
- Supply Report Name
- Document What Report is Doing in Description
- Click – OK
- Choose – Run Newly Saved Report
- Report Succeeds with a Data Grid of Values Requested
- Execution Phase Starts with More Capabilities to Change Report

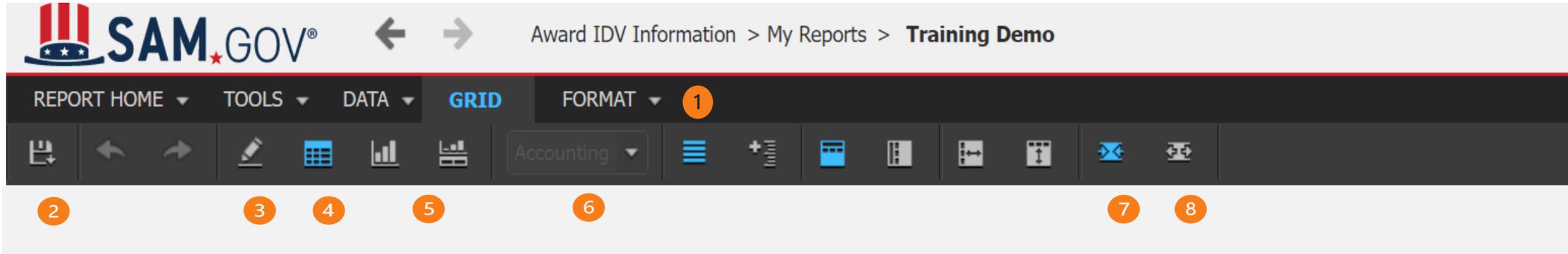


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Ad Hoc Report - Execution Mode(Data Output)

Black Bar Icon Commands (frequently used ones)



1. Toolbar Pull Down Menus

2. Save As

3. Design (edit)

4. Display Data grid

5. Create Graph Or Graph With Data

6. 25 Versions of Accounting Formatting of Grid

7. AUTOSIZE Columns Report Values

8. AUTOSIZE Columns to Screen Window

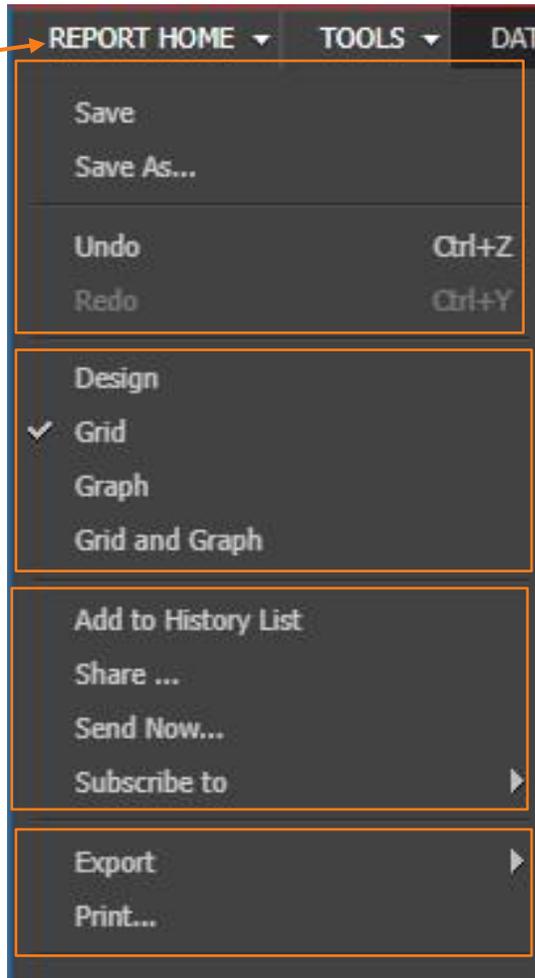


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Ad Hoc Report - Execution Mode(Data Output)

REPORT HOME Pull Down Menu



- SAVE and SAVE AS
- DESIGN -Go back to Design Mode (edit)
- SHARE - Give code to Other User
- SEND NOW - email report output now
- SUBSCRIBE TO - Schedule Recurring Run
- EXPORT - EXCEL, CSV, TXT file, etc.
- PRINT - as a PDF



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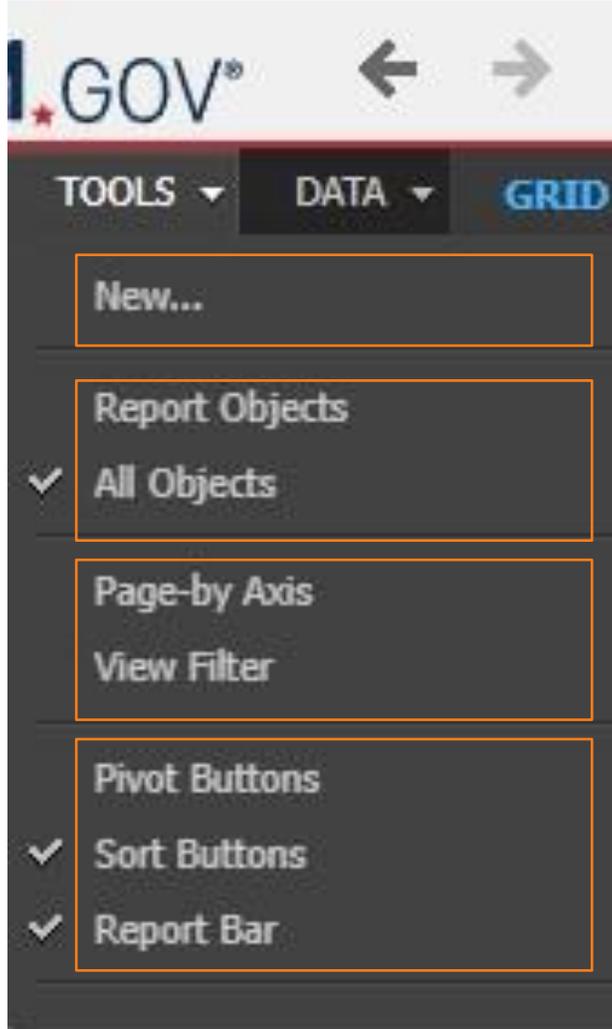
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Ad Hoc Report - Execution Mode(Data Output)

TOOLS Pull Down Menu

Most are **Advanced** Features

- NEW
 - To Create a New Report
- REPORT OBJECTS
 - Display Only Fields in the Report
- ALL OBJECTS
 - Display All Fields Available for a Report
- PAGE BY AXIS (advanced – leave off)



- PIVOT BUTTONS
 - Adds Buttons to Each Column Heading
 - Move a Column to Be a Row
- SORT Buttons (want it on)
 - Turns On/Off Column Heading Sort Arrow
- REPORT BAR (want it on)
 - Turn On/Off Report Stats-Num Pages/Rows



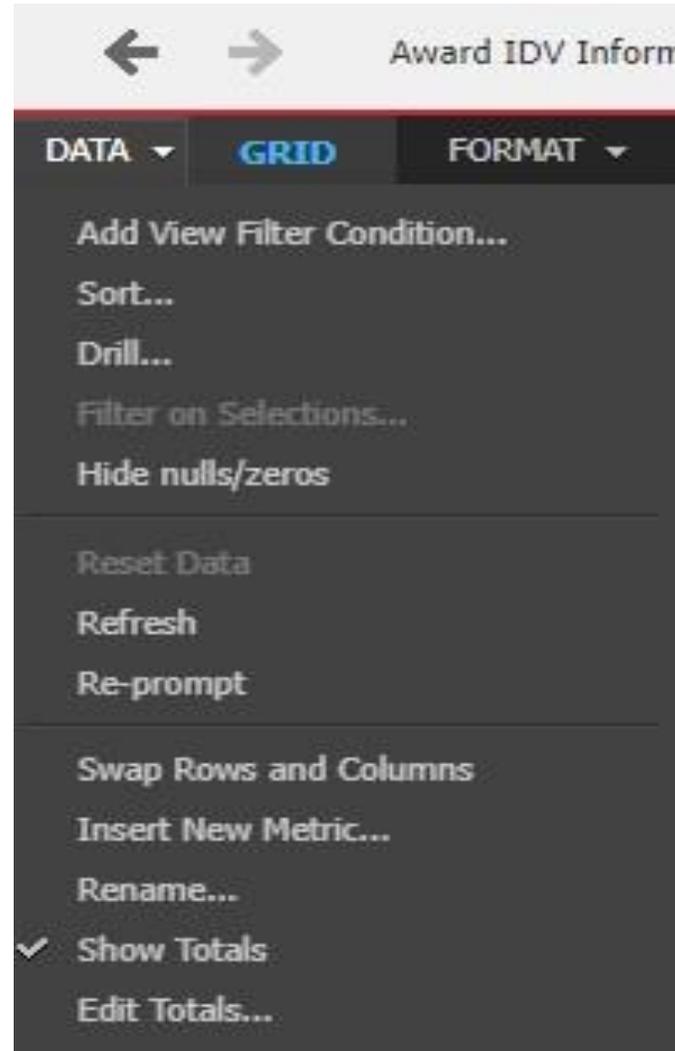
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Ad Hoc Report - Execution Mode(Data Output)

DATA Pull Down Menu

- Sort - Goes to SORT GRID
- Drill -Same Drill Fields from Std. Reports
- Refresh - Rerun Report
- Re-Prompt - Prompt for Date Changes
- Insert New Metric (advanced)
- Rename - Change Column Headings Text



- Show Totals
 - Click - SHOW TOTALS
 - Each Field Gets a Total (probably do not want)
- Click – EDIT TOTALS
- ALL SUBTOTALS - Uncheck box
 - Using Subtotal is an Advanced Feature
- Check - Grand Total Box – to get Final Total
- Click – APPLY and OK Boxes

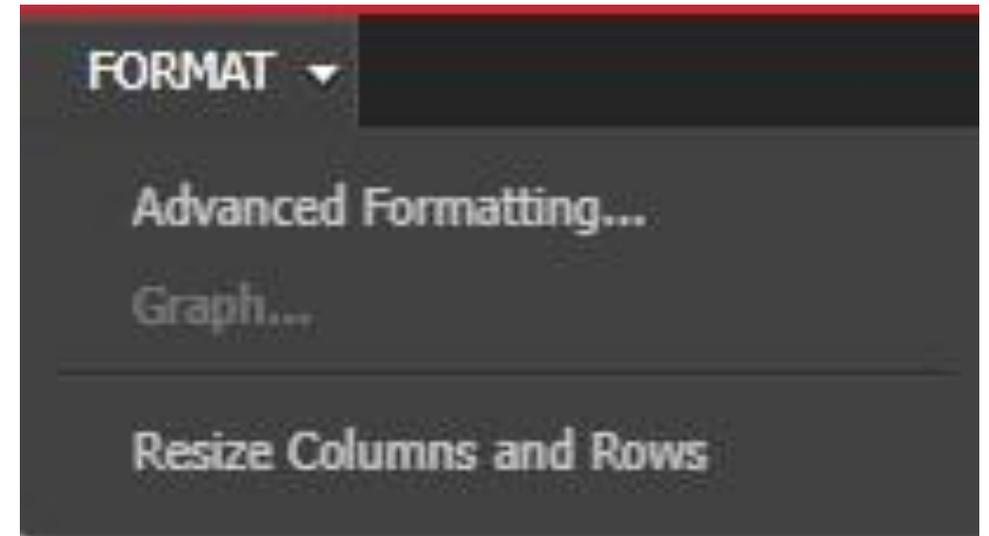


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Ad Hoc Report - Execution Mode(Data Output)

- FORMAT (pull down - click down arrow)
- Advanced Formatting
 - Change Entire Report Template
 - Change Font and Style and Size
 - Change Font Color
 - Change Cell Padding and Lines
- Recommend to Take Format Defaults

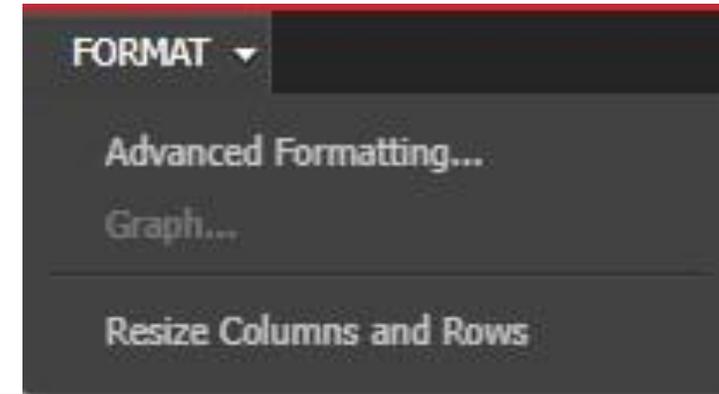


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Ad Hoc Report - Execution Mode(Data Output)

- FORMAT (pull down - click down arrow)
- RESIZE Columns and Rows
- Use for a Report Used Repetitively
- Worth the Effort to Size Columns of Similar Field Types
 - Make All Long Description Fields – Same Size (i.e. 2.5 inches)
 - Make All Dollar Fields – Same Size (i.e. 1 Inch)
- Under DATA use RENAME to rename Column Headings to Common Use Names in your organization (i.e. MSC vs MAJCOM vs MACOM vs Major Command Code)



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Ad Hoc Reports – Check List

- Create -> New Report -> Blank Report -> Date Range
- Edit in Design -> Metrics to Grid -> Go Up All Object Tree
- Attributes to Grid -> A Few Fields, Same as Filters
- Attributes to Report Filter -> Save As -> Run Newly Saved
- Check Date Range -> Run Report -> Validate Results
- Add More Attributes to Output -> Report Home -> Save
- Format -> Resize Columns -> Data -> Rename Headings
- Report Home -> Save -> Data -> Re-prompt -> Run Report



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Ad Hoc Reports – Check List

- Validate Results
- Report Home -> Export -> Formatted EXCEL to desktop
- Report Home -> Subscribe -> History List
 - Set Run Immediately -> Daily 7:15 PM
 - Advanced Options -> Uncheck Box to Overwrite Self
 - Delivery -> Do Not Deliver After 12/31/2023
 - Change Name at top to Be Descriptive Name
 - i.e. - N00019 FY 22,23 PSC DAILY until 12/31/2023 - > OK



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