Welcome to Using FPDS Ad-Hoc Query and Excel to Improve Market Intelligence

Moderator: Leon Schieber
Black & Veatch Special Projects Corp.

Speaker: Dennis Ellington;
Director, Federal Business Development
Woolpert, Inc.
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SILENCE PLEASE

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Where are the forms? www.samejetc.org

Presentations? www.samejetc.org
Learning Objectives of This Training Session

• How to set up a free user account in FPDS.

• How to create and save an “ad hoc” report format in FPDS for recurring use.

• How to conduct an “ad hoc” query in FPDS.

• How to export “ad hoc” query results into MS Excel and use the MS Excel “pivot table” functionality to analyze the data.
What Data is Reported in the Federal Procurement Data System (FPDS)?

- Prime contract transactions for all contracts whose estimated value is $3,500 or more or that may be $3,500 or more. Every modification to that contract, regardless of dollar value must be reported to FPDS-NG.

- Agencies will report unclassified information on all contract actions using appropriated funds including, but not limited to, those made via:
  - Indefinite delivery vehicle (identified as an “IDV” in FPDS). Examples of IDVs include the following:
    - Task and Delivery Order Contracts, including Government-wide acquisition contracts.
    - Multi-agency contracts.
    - GSA Federal supply schedules.
    - Any other agreement or contract against which individual orders or purchases may be placed.
## Important Reference Documents & Websites

### Reference Documents

- List of Contracting Offices (MS Excel Format)
- FPDS-NG Data Element Dictionary
- FPDS-NG Users Guide
- FPDS-NG Ad Hoc Report Quick Start Guide

### Websites

- System for Award Management; www.sam.gov
- Federal Business Opportunities; www.fbo.gov
- DoD Daily Press Release of Major Contract Awards ($7M or more); https://dod.defense.gov/News/Contracts
How to Set Up a Free User Account in FPDS

• From FPDS Home Screen, Click on “Register”

• Select “Public Accounts”

• Review Notice of Disclaimer, Click on “Yes”

• User Identification Screen: Enter requested User ID/Password and other Required Data Items, then Click on “Save”

• Go to www.fpds.gov

• Log in using your UserID and Password
Setting Up a “Recurring-Use” Ad-Hoc Query Report

and

Conducting Ad-Hoc Queries of FPDS-NG
Categories of FPDS Data Fields

- Department and Agency Information
- Contract Identification
- Contract Dates
- Funding Source
- Contract Marketing Data
- Contract Information
- Legislative Mandates
- Product or Service Information

- Principal Place of Performance
- Product Origin
- Competition Information
- Transaction Information
- Vendor Information
- Vendor Socioeconomic Data
- Business Size Selection
- Referenced IDV Information
Structuring/Saving an Ad Hoc Report - Metrics

1) Click on “AdHoc Reports” Button
2) Click on “New”
3) Under Metrics Manila Folder, Click (+) to Open “Award – IDV Information” and “Other Transaction Information” Folders
4) Under “Award – IDV Information” Folder, Click (+) to Open “Dollar Values” and “Contract Actions” Folders
5) Click on “Dollar Values” Folder
6) Under “Metric Name”, Select “Action Obligation”, then Click “Add”
Structuring/Saving an Ad Hoc Report - Attributes

1) Click on “Select Attributes”

2) Under Attributes/Award-IDV Information Manila Folder, Click (+) to Reveal the Sixteen (16) FPDS Data Field Category Folders

3) Click on Desired Manila Folder to Reveal Data Fields within Each Category Folder

4) Under “Attribute Name”, Click on Selected Data Field, then Click on “Add” Button

5) Once All Attributes Have Been Selected, Click on “Layout and Setup” to Review and Make any Desired Edits to Report Layout.

6) If Satisfied with Selected Attributes and Report Layout, Click on “Save” Button

7) In “Pop Up Window”, Type Report Name in Box, then Click on “Select Folder”.

8) Click on Manila “Personal Folder”, then Click “OK”.

8) Click “OK” to Save Report
Suggested Attributes – Department/Agency/Contracting Office Ad Hoc Report

1) Vendor Information
   a) Vendor Name
   b) Street
   c) Vendor City
   d) Vendor State
   e) Vendor Phone Number
   f) DUNS Number

2) Contract Identification
   a) PIID
   b) Referenced IDV PIID
   c) Solicitation ID
   d) Modification Number

3) Contract Dates
   a) Date Signed
Suggested Attributes – Department/Agency/Contracting Office Ad Hoc Report

4) Transaction Information
   a) Award or IDV Type

5) Department and Agency Information
   a) Contracting Department ID
   b) Contracting Department Name
   c) Contracting Agency ID
   d) Contracting Agency Name
   e) Contracting Office ID
   f) Contracting Office Name

6) Product or Service Information
   a) NAICS Code
   b) Description of Requirement

7) Principal Place of Performance
   a) Principal Place of Performance City Name
   b) Principal Place of Performance State Name

8) Competition Information
   a) Type of Set Aside
Structuring an Ad-Hoc Query
and
Searching in FPDS
Structuring an Ad-Hoc Query and Searching in FPDS

1) Log in to FPDS using your UserID and Password

2) From the Home Screen, Click on the “Adhoc Reports” Button

3) Click on the “Personal Folder” Icon to View a List of All Saved Reports

4) Click Once on the Name of the Desired Report Format, then click the “Edit” Button Below
Structuring an Ad-Hoc Query and Searching in FPDS

1) From the “Create Report” Screen
   a) Click on “Select Time, Filters and Rankings”
   b) In the “Add Filter” Section, Click on “Select an Attribute, and a Drop Down Menu of Attributes will Appear
   c) Click on Desired Attribute to Include in Search, e.g. Contracting Office ID
   d) Click on “Manually enter a value…”
   e) In the pop up box, type in the value to be searched, e.g. W912QR, then click “OK”
   f) Click on the Blue “Add” Button
Structuring an Ad-Hoc Query and Searching in FPDS

2) Once All Search Filters Have Been Selected/Added, Click on the Blue “Execute” Box

3) Enter Start and End Dates to Conduct Search in MM/DD/YYYY Format (Note: Maximum range allowed is five years)

4) Click on Blue “Display Report” Box. FPDS Will Run the Query and Generate the Search Results

5) Click on Blue “Display Report” Box. FPDS Will Run the Query and Generate the Search Results
Exporting/Formatting Data From an FPDS Ad Hoc Query Search

1) Once a Report Has Been Generated, Click on the Blue “Export” Button

2) Choose the Format for Export by Clicking in the “Circle” of the Desired Format, e.g. Comma Separated Values (CSV)

3) Click on the Blue “Export” Button to Export/Download the Report/Data

4) Open the Downloaded File in MS Excel

5) Format the Report in MS Excel for Ease of Viewing

6) Add “Pivot Table” Worksheet to MS Excel File
Practical Application – FPDS Research Scenarios

(A/E) Scenario #1 – Research All IDC Contracts by Specific Client
During the five-year period starting on Feb 9, 2014, what Indefinite Delivery Contracts (IDCs) have been awarded under NAICS 541310 or 541330 by U.S. Army Corps of Engineers, Tulsa District (W912BV)?

(A/E) Scenario #2 – Research all Task Orders/Mods Awarded Under a Specific IDC Contract
What is the total dollar volume of work and dollar value of specific task orders/modifications awarded by USACE Tulsa District under IDC #W912BV-15-D-0007 awarded on 07/09/15?
## Synthesis of Publicly Available Data from FPDS, FBO & DoD Daily Press Releases to Track Current Contracts (Example Format)

**USACE Tulsa District**  
**Active A/E IDIQ Contract Utilization Report**

<table>
<thead>
<tr>
<th>Category</th>
<th>Contract Title</th>
<th>Contract Number</th>
<th>Contract Award Date</th>
<th>Contract Expiration Date</th>
<th>Total Contract Value (Base + Option)</th>
<th>Total Contract Obligation Per FPDS as of Report Run Date</th>
<th>Actual % Contract Utilization</th>
<th>Straight Line % Contract Utilization</th>
<th>Incumbent Contractor</th>
<th>City</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>A/E</td>
<td>IDC A/E Contract for Engineering, Design and Construction Phase Services for Hydrology and Hydraulic Engineering, Design Modeling, Manual Development and Computer Programming Engineering Services for SWD Boundaries</td>
<td>W912BV-15-D-0001</td>
<td>03/03/15</td>
<td>03/02/20</td>
<td>$9,500,000</td>
<td>$5,261,858</td>
<td>55.39%</td>
<td>76.56%</td>
<td>West Consultants, Inc.</td>
<td>San Diego</td>
<td>CA</td>
</tr>
<tr>
<td>A/E</td>
<td>IDC for A/E Services for Geotechnical and Construction Material Sampling, Testing, Surveying, Analysis and Design for Military, Civil or Environmental Projects Located within the Southwestern Division (SWD) Boundaries</td>
<td>W912BV-15-D-0002</td>
<td>04/15/15</td>
<td>04/14/20</td>
<td>$9,500,000</td>
<td>$4,691,928</td>
<td>49.39%</td>
<td>74.22%</td>
<td>Reitz &amp; Jens, Inc.</td>
<td>St. Louis</td>
<td>MD</td>
</tr>
<tr>
<td>A/E</td>
<td>IDC Contract A/E services for Engineering, Design and Engineering During Construction Services for Military and Interagency and International Services Located within the SWD Boundaries</td>
<td>W912BV-15-D-0009</td>
<td>06/29/15</td>
<td>06/28/20</td>
<td>$4,000,000</td>
<td>$616,917</td>
<td>15.42%</td>
<td>70.11%</td>
<td>BES Design/Build, LLC</td>
<td>Fairhope</td>
<td>AL</td>
</tr>
<tr>
<td>A/E</td>
<td>IDC Contract A/E services for Engineering, Design and Engineering During Construction Services for Military and Interagency and International Services Located within the SWD Boundaries</td>
<td>W912BV-15-D-0008</td>
<td>07/03/15</td>
<td>06/30/20</td>
<td>$4,000,000</td>
<td>$2,824,866</td>
<td>70.62%</td>
<td>70.00%</td>
<td>Blair Remy Corporation P.C.</td>
<td>Oklahoma City</td>
<td>OK</td>
</tr>
</tbody>
</table>
Practical Application – FPDS Research Scenarios

(Construction) Scenario #1 – Research Construction Contract Awards by Specific Client
During the five-year period starting on Feb 9, 2014, what MATOCs, MATOC Task Orders/Mods, SATOCs or standalone construction contracts have been awarded under NAICS 236220 by U.S. Army Corps of Engineers, Savannah District (W912HN)?

(Construction) Scenario #2 – Specialty/Trade Prime Contract Awards by Specific Client
During the five-year period starting on Feb. 9, 2014, what specialty trade contractors have been awarded prime contracts under NAICS 238XXX by NAVFAC Mid-Atlantic (N40085)? At what installations was the work performed? What was the total dollar volume of work, and dollar value of specific task orders/modifications?
Q&A AND FEEDBACK

Dennis Ellington
Director, Federal Business Development
Woolpert, Inc.
11486 Corporate Blvd., Suite 190
Orlando, FL 32817
Office: 407-591-5028
Mobile: 937-903-1502
E-Mail: dennis.ellington@woolpert.com