

Contract Data Mining in beta.SAM.gov and USASpending.gov

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New Hampshire
**PROCUREMENT TECHNICAL
ASSISTANCE CENTER**



Introduction and Participant Guide

- ▶ Stuff to know before we start
 - ▶ Muting
 - ▶ Chat function
- ▶ Slides will be posted at www.NHEconomy.com/ptac under Training Presentations
- ▶ Session is being recorded
 - ▶ We will post the recording as soon as we're able



What to Expect from Today's Webinar

- ▶ Introduction to beta.SAM.gov
 - ▶ What is beta.SAM.gov
 - ▶ How to access the Data Bank
 - ▶ Accessing the Contract Data
- ▶ FPDS
 - ▶ Specific Contract Data*
- ▶ Introduction to USASpending.gov
 - ▶ What is USASpending.gov
 - ▶ How to access Contract Award data
 - ▶ How to view data
 - ▶ Example of extracted EXCEL report

Introduction to beta.sam.gov

- As stated on the federal website, www.beta.SAM.gov, the General Services Administration (GSA) is in the process of migrating 10 online websites it utilizes to manage federal acquisition and awards processes into one.
- This site will become the official U.S. government website for people who make, receive, and manage federal awards.
- As many are aware the old “FBO” transitioned here last year



Introduction to Contract Data Reports

- The official notice appears in both the FPDS and beta.SAM site provides up to date information:
 - **Contract Data Reports**

“The FPDS reports transition to beta.SAM.gov is complete and the beta.SAM.gov [Data Bank \(opens in new window\)](#) is the only place to go to create and run contract data reports.”
 - *“If you are searching for contract data (i.e., searching for specific contracts), you must do so at [FPDS.gov \(opens in new window\)](#), which remains the authoritative source for contract data.”*
- Note that It is certainly in the government’s plan to transition away from the “beta” version of the new “SAM.gov”, at which time it will house multiple systems, to include contract data reports, entity data (current SAM.gov), contract opportunities and more.



Introduction to Contract Data Reports

➤ Data Bank

- *The reports now available at beta.sam.gov can allow you to analyze certain types of federal spending data with a few clicks.*
- *Geographical report by vendor location, or by place of performance*
- *Small business and other socio-economic spending*

➤ Contract Data Reports

- *The Data Bank consists of Contract Data Reports*
- *Reports on acquisition awards are available to the public**
- *Reports allow you to analyze data, whether by geography, agency, product/service type or other attributes.*

**some require a login*



Contract Data Reports

- ▶ While some data research is available at **beta.SAM.gov** without a LOGIN, access to many Contract Data Reports require you to create and utilize a personal log in. Login to this and other government data systems is provided through **login.gov**, and is the same as your login for **SAM.gov**.
- ▶ The **login.gov** sign-in process involves a two factor authentication – username and password; 6 digit confirmation code by voice, text or email
- ▶ **Tip** – provide multiple means of authentication – especially remote means. This provides lockout insurance
- ▶ Let's go to **beta.SAM.gov** and check out the available reports.

Contract Data Reports

- From the **beta.SAM.gov** home page to access the **Contract Data** content:
 - Click the content icon(≡) and select **Data Bank** from the icons presented.
 - The **Data Bank** landing page will appear, which provides a brief description and presents an option to sign in or sign up
 - Left-hand menu will have “Standard” reports selected
 - Appears to require that you sign-in or create an account (unless you are signed in)
 - At **beta.SAM.gov** you are successfully logged-on when the Profile icon (upper right) has two options: Profile and Sign Out.

Data Bank Landing Page

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](#)

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.


Sign in to access Contract Data Reports

[Sign In](#)

Don't have a user account?

[Sign Up](#)

[Find out more](#)



Contract Data – Static Reports

- ▶ From the left hand menu (under Reports), selecting **Static** will load a page with several reports that the Government provides on a Fiscal Year basis:
 - ▶ National Interest Actions (hurricanes, Covid-19, other disasters)
 - ▶ Top 100 Contractors
 - ▶ Small Business Goaling Reports
 - ▶ Federal Procurement Data history (1981 to 2007, in PDF formats)

Contract Data – Standard Reports

- From the left hand menu again, select “Standard”
- There are currently 36 **Standard** Reports available listed in alphabetic order by report name.
- First we will go to page 2 and select “**Federal Contract Actions and Dollars**”
- Enter criteria: data range and organization/agency
 - We will use 10/01/2019 to 9/30/2020 (for FY20 data available to date) and no specific Organization or Region
 - Result is tally of contract spending by federal agency in descending (\$) order by Agency.

*Results show **\$584 Billion** as of **11/5/20** for all Agencies representing all contract spending for FY20 (DOD is allowed up to 90 days to report).*

Contract Data – Standard Reports

- Return to the Standard Reports (using link above report)
- Next lets look at **Geographical Report by Vendor Location**
(also Page 2)

Using State of New Hampshire, and the same FY20 date range,

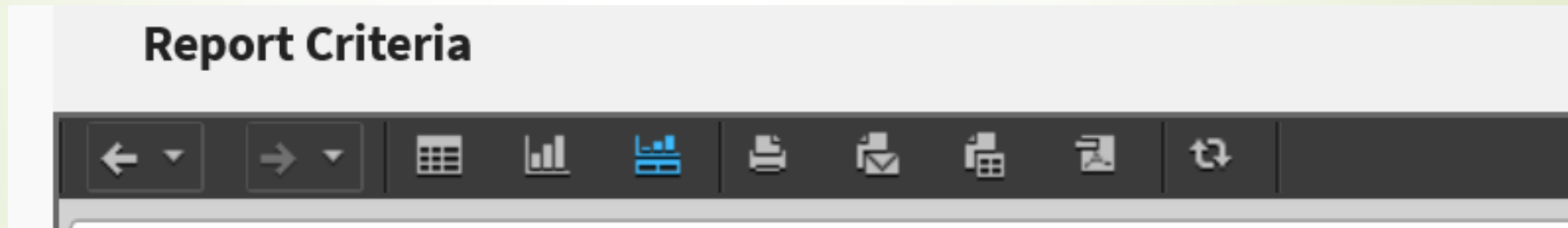
The results show **\$2.1 Billion** of total contract spend going to Vendors with their *primary office geographic location* in New Hampshire.
- Again, returning to Standard reports, now lets review the **Geographical Report by Place of Performance** (for comparison)

Using State of New Hampshire, and the same FY20 date range,

The results show the total spend for New Hampshire as *Place of Performance* is **\$1.6 Billion** for the FY20 date range.

Contract Data Reports

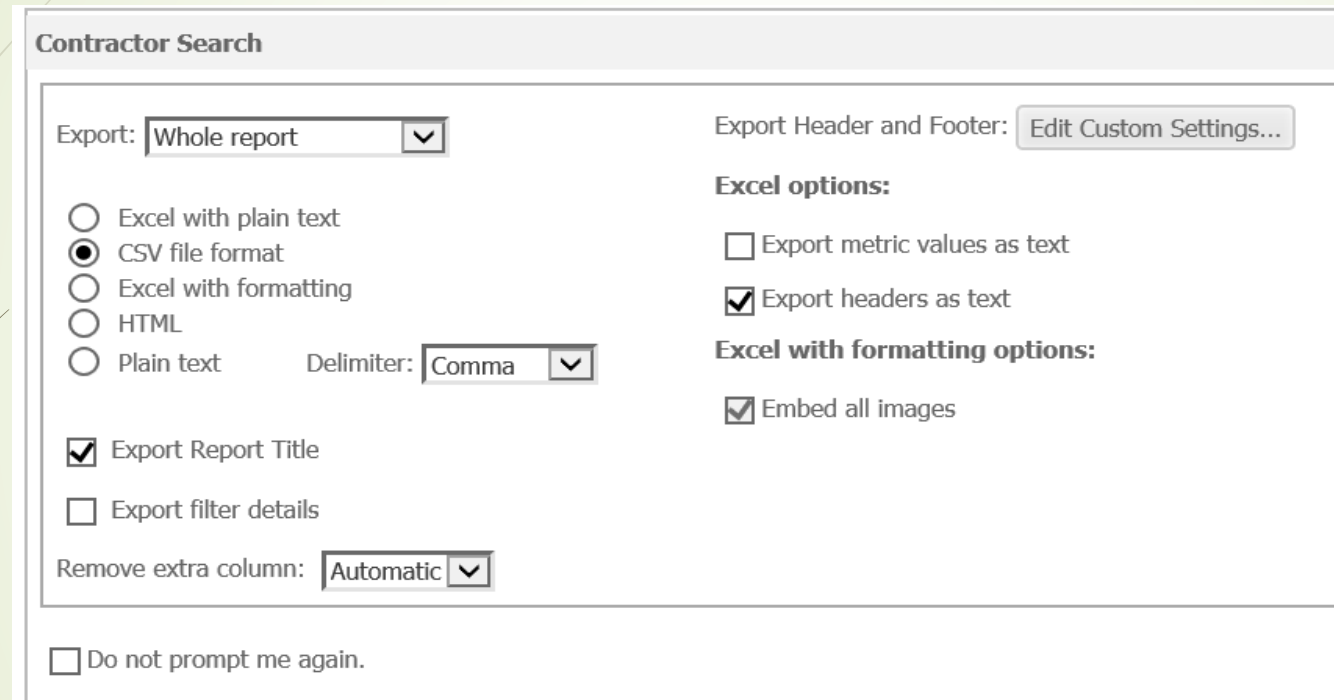
- ▶ Returning to standard reports, our final report to review is **Contractor Search** (bottom of page 1)
- ▶ Results are provided by Vendor Name
 - ▶ This may result in multiple lines for the same contractor
- ▶ Top of the report has multiple options



- ▶ Default view is Grid, may choose to view as a graph, or both
- ▶ May print, email, export, send to PDF or refresh data (listed in order of icons)

Contract Data Reports

- Selecting Export brings you to a page of options for exporting:



The screenshot shows a web interface titled "Contractor Search" with various export options. The "Export" dropdown is set to "Whole report". Under "Excel options", "Export metric values as text" is unchecked, and "Export headers as text" is checked. Under "Excel with formatting options", "Embed all images" is checked. Other options include "Excel with plain text", "CSV file format" (selected), "Excel with formatting", "HTML", "Plain text", "Delimiter" set to "Comma", "Export Report Title" (checked), "Export filter details" (unchecked), and "Remove extra column" set to "Automatic". A "Do not prompt me again" checkbox is at the bottom.

Contractor Search

Export: ▼

Export Header and Footer:

Excel options:

Export metric values as text

Export headers as text

Excel with formatting options:

Embed all images

Excel with plain text

CSV file format

Excel with formatting

HTML

Plain text Delimiter: ▼

Export Report Title

Export filter details


Remove extra column: ▼

Do not prompt me again.

- Select options and choose export
(right hand side of page)
- **NOTE:** at this time (NOV 6, 2020), a number of the standard reports are not functioning properly.

Contract Data - Ad Hoc Reports

- ▶ Returning to the Data Bank, we will now take a look at **Ad Hoc Reports** (sign-in is required)
 - ▶ **Ad Hoc** reports provide the opportunity to create customized reports
- ▶ Select Ad-Hoc from the left-hand menu and select “**Award/IDV Information Report**”
 - ▶ Presented with a screen that is somewhat blank
 - ▶ “Create” button at top left – select, hover over “New Report” and you are presented with 2 options: *Report Builder* or *Blank*
 - ▶ We will select **Report Builder** for this example
 - ▶ Report Builder will prompts for information to build the report:
 - ▶ Date signed (start and end), attributes, metrics and more



Contract Data - Ad Hoc Reports

- ▶ Start Date and End Date (for Date Signed): 10/1/2019 – 9/30/2020
- ▶ Select Attributes (our sample selections):
 - ▶ Contract Identification: PIID (contract) number, and solicitation number
 - ▶ Department and Agency Information: Contracting Agency Name
 - ▶ Transaction Information: Award or IDV Type
 - ▶ Product or Service Description: NAICS code and Description of Requirement
 - ▶ Vendor Socio-Economic Data: Economically Disadvantaged Women Owned Small Business
 - ▶ Note multiple pages here, must use arrows at bottom to move past “F”

Contract Data - Ad Hoc Reports

- ▶ Select Metrics:
 - ▶ Base and all Options Value (Total Contract Value)
 - ▶ Dollars Obligated
- ▶ Qualify on any attribute:
 - ▶ Click on the arrow/triangle to left to select qualifiers
 - ▶ Sample Selection “Principal Place of Performance”
 - ▶ Secondary menu select Principal Place of Performance State Code
 - ▶ Once selected, click on “*Form*” and select ID (only option), then click on “*Value*” and enter State code (NH)
- ▶ Metric Qualifications: filters results based on value entered
 - ▶ Sample selection is “Base and all Options Value”
 - ▶ greater than or equal to \$10,000 (no formatting necessary)

Contract Data - Ad Hoc Reports

- Options are all selected
- Very bottom of page has option to Save or Cancel, and a name field for the report (defaults to Report Builder)
- Click Save
 - If any errors exist you will receive a pop-up notification to correct errors
 - If it has taken a decent amount of time it will time out, but you may "Reprompt"
- Prompt to Save (and name), provide a description as well as other advanced features

Contract Data - Ad Hoc Reports

- Once Saved will receive notice stating so, and option to “Run Newly Saved Report”
 - Returns you to the report builder
 - Bottom of page, prompts now updated to say “Run Report” (or cancel)
- Report displayed just as with the Standard report
- Shows all awards (over \$10,000) to EDWOSB firms with a principal place of performance in NH (17 pages)
- Use menu at top of report to export, print, or view in chart form.

Contract Details - FPDS

- ▶ Now that we have overall data, how do we drill down?
- ▶ We need to go to [FPDS](#) (Federal Procurement Data System) to view details of the contract
- ▶ The PIID is the Contract Number, copy this number and paste into the search field on the home page of FPDS
 - ▶ Note, you need to clear the search box first if clicking does not do so.
- ▶ Using the First PIID in the list, 12148419P0006, we get a few results because of modifications
 - ▶ Contractor Name is R. M. Piper Inc.
 - ▶ NAICS (& code) = Landscaping Services, 561730
 - ▶ Contracting Office = White Mountain National Forest
 - ▶ Clicking into the listing with (0) in the modifications we can view more details, such as the solicitation number, who prepared the award and more.



Introduction to USASpending.gov

- ▶ Relatively new data source is described as *“the official open data source of federal spending information. We track how federal money is spent in communities across America and beyond. Learn more about government spending through interactive tools that explore elements of the federal budget, such as federal loan, grant and contract data”*.
- ▶ This database grew out of the federal spending activity reporting arising out of the “great recession” era of 2007-2008 era. During that time, there was great public interest in where federal funds were being provided and spent through various programs including contracting and grants/loans, etc.
- ▶ This database is contains detailed data for the vast, vast majority of federal funds transactions. For our purpose, Contract Data, contract award information is able to be compiled/reported in .csv format in great detail. If my math is correct, each contract transaction listed contains 260 (+/-) columns of data relating to the contract transaction.

Introduction to USASpending.gov

- As example, for the contract data obtained from the beta.SAM.gov reporting cited previously, FY20 Contract Spend for Place of Performance of New Hampshire, approximately \$1.6 Billion, the spreadsheet able to be obtained in a very short period of time, provides details of \$ 1,597,676,749 in contract spending (OCT 2020).
- Data elements are too numerous to detail but include, as example, the FAX number that the Vendor has included in their SAM registration, and the Salary amounts for the top 5 executives in publically held companies – again a SAM data element for other-than Small businesses.
- A key data element is the Solicitation Number of the specific contracting action (most but not all transactions, particularly pre-2007 actions) which is highly useful in competitive research. Note that the first 5 digits of the Solicitation number is generally the PIID (Procurement Instrument Identifier) of the Buying Office.
- Circling back to **beta.SAM.gov**, you can use the PIID as a keyword to search for procurements out of the buying office you want to work with going forward. There are even names of buyers.



Introduction to USASpending.gov

- If greater drill-down is desired, Award Searches can be created in a more targeted manner.
- For example, for a small Electrical Contracting firm (NAICS 238210) wanting to do contract work in New Hampshire and Massachusetts, this search can be performed using the applicable Advanced Search categories.
- Results of thus far in FY20 show \$6.8 Million in contracts in 158 specific transactions able to be viewed/downloaded.
- If run over past 3-5 years, a prospective contractor would be able to gain a good sense of the federal contract market for the specified NAICS service, and who/where the activities are that put these contracts out to bid.



Introduction to USASpending.gov

- In closing, it is worth mentioning that for these potentially large data documents which are available, use of the EXCEL Pivot Table function is very valuable.
- Creating pivot tables which include the data elements of greatest value to the user, for example, the NAICS Code for Electrical Contracting cited above, a pivot table is a very useful vehicle by which targeted opportunities searches become increasingly simple to create.

Shameless Commercial:

- ▶ NH PTAC offers free assistance with all this & more.
- ▶ You must have a physical presence in New Hampshire.
- ▶ You have to sign up online.
- ▶ To continue “active client” status, you have to use us as a resource.

- ▶ Our Contact Information:

- ▶ New Hampshire Procurement Technical Assistance Center
- ▶ Division of Economic Development
- ▶ Department of Business and Economic Affairs
- ▶ 100 North Main Street, Suite 100
- ▶ Concord, NH 03301-4991

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How do I get started with NH PTAC?

- Go to the website and answer our questionnaire (www.nheconomy.com/ptac)
- Give us a call at (603) 271-7581
- email us at: govcontracting@livefree.nh.gov
- Meet with us in Concord (currently via Zoom)
- Request a site visit – we'll come to you.

