### Training Document

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<th>Date</th>
<th>Version Number</th>
<th>Submitted By</th>
<th>Change Reference</th>
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<tr>
<td>01/08/2010</td>
<td>1</td>
<td>Jennifer Lou Strutt</td>
<td>Began initial review of the manual. Testing exercises and content. Replace the screenshots with the current navigation and report screens.</td>
</tr>
<tr>
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<td>Jennifer Lou Strutt</td>
<td>Created final editing changes and modifications to the manual including exercises, adding current content, and deleting older versions of some subject matter. Replace the screenshots with the current navigation and report screens.</td>
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### Document Change History

![Document Change History Table]

**Document Approvers***

<table>
<thead>
<tr>
<th>Version Number</th>
<th>Date Approved</th>
<th>Approved By</th>
<th>Role/Responsibility</th>
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*Indicates name of final person authorized by GCE executive management to perform document approval.

Please note: All GCE process-related documentation must be presented to the GCE Software Engineering Process Group (SEPG) for internal review and approval prior to its upload onto the GCE Process Asset Library (PAL). An approval notification will be emailed to the submitter when the process has been approved. If no approval email is received within 72 hours of submittal, please assume that the process has not been approved.
• For questions or comments, please contact your team’s SEPG Representative or the GCE SEPG Director.

Stakeholders Acceptance Table

<table>
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<th>Date Approved</th>
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*All GCE projects have been reviewed and approved jointly with that project's stakeholders. Project stakeholders are clients and internal (GCE) employees whom have an equal responsibility towards a project's success.
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1 FPDS-NG AD HOC REPORTING TOOL

1.1 Introduction

This section specifies instructions for creating reports based on your selected criteria. Agencies/Companies can create reports that answer their business questions and analyze processes. FPDS-NG uses the Informatica, Power Analyzer tool to create custom reports. Users have the option to save customized queries and reports in a personal folder specific to their User ID.

The report result is limited to returning 10,000 rows.

1.2 Ad hoc Reporting Features

Selecting Ad hoc will display the query panel and standard tool bar. The Ad hoc Reporting Screen contains a Personal Folder where saved queries are stored specific to the user’s ID. The following screen will display when the user opens Ad hoc for the first time using the Informatica tool.

2 CREATING AN AD HOC QUERY

Ad hoc reporting is a user friendly feature designed for all levels of users. Custom reports are created using queries. A query is one or more statements that request data from a database. If the data is available, then the requested data is returned in the form of a table which contains rows and columns that create a report. Queries are sent to the databases in a language called SQL. However, when using the Report Panel, SQL knowledge is not required.

2.1 New and Find Button

The “New” button displays a new screen that allows you to create analytic reports from the FPDS-NG data by using a query. A report consists of a set of related metrics and attributes. The
queries are based on metrics, attribute filters specified by the user in the report. When a new report is generated, ad hoc displays the queries from the database. You can modify the data and the format of a report.

The “Find” button allows you to access your personal folder from other screens in the ad hoc tool. Any saved queries you have will be stored in your personal folder.

2.2 To access the new report screen in Ad hoc

1. Access the Ad hoc reporting tool from the main navigation screen.

2. Select the “New” Button located at the top left side of the reporting screen. The “Create Report” Screen will display as shown below.

3. The “Create Report” screen is used to select and enter analytical information for a report. This screen is divided into four sections designed to create a query for a report.
2.3 To Create a New Report in Ad hoc

The first step in creating a report is specifying the data for the report. Section 1 “Selecting Metrics” adds the measures to evaluate a business process. Metrics are always numeric values. For example, Dollars Obligated, Actions Count, and Base and All Options Value are metrics that provide measurable information used to determine trends in federal spending.

1. Choose the desired metric(s) and then click on the “Add” button that is next to the desired metric(s). The chosen metric(s) is (are) added to the Metric box in Section 1.

2. After selecting the desired metrics, click Section 2 “Select Attributes” to add attributes to the report.
2.4 To Select Attributes for a New Report

Attributes are the factors that determine the value of a metric. For example, Date Signed, Product Services Codes, and Contracting Office Names are attributes. If you want to create a report that tracks Dollars Deobligated and Total Actions for a specific agency, you need to identify attributes that determine the values of these metrics.

1. Choose the desired attribute(s) and then click on the “Add” button that is next to the desired attribute(s). The chosen attribute(s) is(are) added to the attribute box in Section 2.

2. After selecting the desired attributes, click Section 3 “Select Filters” to set the filter/criteria for the report.
2.5 To Create Filters on a New Report

You can use a filter in your report to set criteria for the report data. When creating a report, criteria are used to limit the search of the query to your specifications. The criteria depend on the business question that you want answered.

1. The “Attribute Filter” link will display highlighted in black shown in the following example. This link is used to access filters for each attribute that is included in Section 2.

2. Use the drop down menu to highlight and select the attributes that you want to set the filter for.
3. After selecting the attribute that you want to set the filter for, use the drop down menu to highlight and select the operator that provides the criteria for the selected attribute value.

4. Provide the criteria for the filter by entering information in the Attribute Value box(s).
5. Select **Add** to save the filter values and the saved filter will be displayed in the Report Filters section of the screen.
6. If you want to set the filters for the metrics, you can use the “Metric Filter” link that is displayed in the Add Filter section. When the “Metric Filter” link is selected, it displays highlighted in black shown in the following example. This link is used to access filters for the selected metric value.

7. Use the drop down menu to select the metric that you want to set the filter for.

8. After selecting the metric that you want to set the filter for, use the drop down menu to highlight and select the operator that provides the criteria for the selected metric value.

9. Provide the criteria for the filter by entering information in the Metric Value box.
10. Select **Add** to save the filter values and the saved filter will be displayed in the Report Filters section of the screen.

2.6 To Updating Filters on a new or existing report
Filters are stored under the Report Filter Section in Section 3 - “Select Time, Filters, and Rankings.” Use the following steps to update Attribute and Metric Filters.

1. To make changes to an existing filter, click on the blue link of the existing filter. For example, click on the link.

   ![Example Filter Link](image)

2. The selected filter link is highlighted and the color of the filter will be changed from blue to green. The selected filter will display the information in the Edit Filter section.
3. Make the changes to the filter by selecting information from the drop down menus or entering new information in the Values field(s).

4. After the changes are completed, click on the “Update” button to store the changes in the “Report Filters” section.

2.7 To Save a Report

After a query is created, the information can be saved and used again when needed. You can save the query after adding filter information. Use the following steps to save report queries:

1. Enter a name in the report name field shown in the following example:
2. Click on the “Save” button to store the report and its queries in your personal folder.

2.8 To Generate a Report

After adding the report filters/criteria, the report can be generated. To keep the changes made to the query, click on the “Save” button to save the query; you can also generate the report and then save the query from the displayed report screen.
1. To generate a report, click on the “Execute” button. After clicking on the “Execute” button, the report will display the page where you can specify the time range for your report.
2. After specifying the time range, click on the “Display Report” button to generate the report. The following is the sample result screen after the report is generated:

![Sample Result Screen]

2.9 To Format the Report

The final step in creating reports is selecting the formatting for the report. Section 4 “Layout and Setup” is used to customize the visual display of your report. Calculations can be added for metric filters in the report. You can also modify the date formats, display, and fonts in the report. Use the following steps to format a report.

1. To add a section to a report, select the “Table Layout” Tab.

2. To create the report with sections, drag an attribute to the Section Attribute area and the selected attribute will be displayed in the Section Attribute area. You can also drag attributes from the Section Attribute area back to the Row Attribute or Column Attribute areas.
Creating sections in a report will display the report divided by the attribute you have chosen. For example, choosing the Contractor Name will display the report information in sections for each Contractor Name.

3. To add a calculation to the report, select the “Calculating” Tab. The following screen will display.
4. Select the drop down menus next to Show seen in the following example.

5. Select the type of calculation desired for a metric filter.

6. Select the drop down menu to select the metric for the previously chosen calculation.

7. To display the subtotals for a specific column click the check box and select the drop down menu for Show Subtotals. Click the attribute that will display the subtotals.
FPDS-NG Ad hoc Report Quick Start Guide
8. Select Add to place the calculations in the Summary section.
9. To change the formatting for the report, select the “Formatting” Tab. The following screen will display.

You select formats for metrics and attributes on the “Formatting” tab. These formats determine how the metrics and attributes display in the report table.

10. To keep the changes made to the report formatting in the same report, click on the “Save” button. To keep the changes made to the report formatting and want to save the report as a new report, click on the “Save As” button. The “Save As” function will allow you to make changes to the query and save the changes in the new query/report without overwriting the original query/report.

3 DRILLING DOWN

3.1 Drill Down Feature

The drill feature provides other attributes or metrics at a lower level related to the current report that is displayed. The following section Drilling into a Report explains how to shift from a general view of the report data to a more detailed view using the drill down feature.

Drilling into a Report

When drilling into a report, attribute or metric values are selected for the drill. The reporting tool uses these values as a drill filter. The drill filter determines the data seen in the drill results. More than one attribute or metric value for the drill can be selected.

3.2 To Drill into a Report

To drill into a report:
1. To select the attribute value for the drill feature, you can click on the header of the attribute to select all the attribute values for the attribute or you can click on the specific cell with the specific attribute value for the attribute. The values will be used for the “Drill” feature to filter the report information.

Note: To select more than one attribute column, hold down the “Ctrl” key while clicking on the title of each desired attribute column. To select a contiguous range of values, use the “Shift” key while clicking on the desired attributes. To select a non-continuous range of values, use the “Ctrl” key while clicking on the desired attributes.

2. Click on the “Drill” button. The reporting tool displays the available drill paths on the Drill tab.

In order to use the “Drill” feature with all the available attributes, one of the following attributes values will need to be included in the Ad hoc report – Section 2 Select Attributes:

- Contracting Department ID
- Contracting Agency ID
- Contracting Office Region
- Contracting Office ID
- Vendor Name
- Referenced IDV PIID
- PIID
- Modification Number

If the DOD users want to get the information that is associated with their commands or is associated with certain transaction, they will need to include one of the following attribute values in their Ad hoc report – Section 2 Select Attributes:

- Transaction Number
- Major Command Code
- Sub Command1 Code
- Sub Command2 Code
- Sub Command3 Code

-Or-

In the report result table, right-click on the selected values and then click on the “Drill” to view all the available attributes that can be used in the drill feature.

You can select those attributes from the available drill paths that are not already part of the report (the attributes that are not included in the Section 2 Select Attributes.)

3. From the available drill paths, click on the attribute that you want it to be displayed in the report.

For example, if the report currently displays the government wide report for the Department of Homeland Security, you can use the drill feature to select the “Contracting Agency ID” attribute to display the agencies (i.e. Coast Guard, Transportation Security Administration) for the Department of Homeland Security. Overall, the report drill filter will show all the agencies that are associated with the Department of Homeland Security for the reporting period.

4. To go back to the original report, click on the “Original Table” link in your current drill path header.
Tip: To view a description of the drill filters or the search criteria information, you can click on the information icon. The information icon will display the report filter and search criteria information.

After the drill filter is created, additional attributes can be selected for the report. Drilling into a report allows you to filter attribute values and see additional attributes in reports. Additional attributes are selected from a predefined drill path. The predefined drill path lists the attributes that are available for selection to display in the report.

4 HIGHLIGHTING METRIC VALUES

You can use colors, patterns, or symbols to highlight metric values in a report table. You can highlight metric values in a report that are above, below, or within a range. Highlighting allows you to draw attention to critical data in a report or pinpoint problem areas.

If you create the bar chart for your report, the metric values that are used in the “Highlight” rule in the report will also appear in the bar chart. In the charts, the reporting tool displays those highlighting values as colored dots. Colored dots are a type of highlighting format.

Creating a Highlighting Rule

4.1 Specifying Ranges

When you create a highlighting rule, you specify three ranges (low, medium, and high) for the values that you want the reporting tool to highlight. You must enter numeric values that correspond to the values in the report table. These ranges must be in the ascending order.

4.2 To Create a Highlighting Rule

To create a highlighting rule:

1. Generate the report that you want to use the highlighting rule; the report result will be displayed on the screen after it is generated.

2. Click on the header of the metric column (Action Obligation, Based and All Options Values…etc.) for which you want to create the highlighting rule. The reporting tool selects the column for the desired metric.

3. Click on the “Highlighting” button. -Or-

Right-click on the metric header and then choose “Create Highlight.” The reporting tool displays the “Highlighting” button.
1. Enter the following information:

<table>
<thead>
<tr>
<th>Property</th>
<th>Required/optional</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name the highlighting rule field</td>
<td>This field is required</td>
<td>This field is used to name the highlighting rule. After the highlighting rule is named, and then saved, it is stored on the Analyze section where it can be edited or deleted.</td>
</tr>
<tr>
<td>Specify numeric values for each field</td>
<td>These fields are required</td>
<td>The fields available specify numeric values for ranges for the metric or calculation. <strong>The ranges must be in ascending order.</strong></td>
</tr>
<tr>
<td>Then highlight</td>
<td>This function is optional</td>
<td>Select colors for each range of values. The system defaults with red for low numeric values, yellow for medium numeric values, and green for high numeric values.</td>
</tr>
<tr>
<td>Specify formatting for highlighting</td>
<td>This function is optional</td>
<td>Select the type of formatting you want to use for highlighting the range of numeric values. The system defaults with a background color for each numeric value.</td>
</tr>
</tbody>
</table>

2. Click OK. The highlighting rule will appear in the “Information” area and the highlighting rule will be displayed in the report result.
4.3 **Modifying a Highlighting Rule**

You can modify the name, value ranges, colors, format, state, and user access of a highlighting rule.

4.4 **To Modify a Highlighting Rule**

The following is the sample to modify a highlighting rule:

1. To modify any aspect of the highlighting rule, click on the Information button and the highlighting rule name that you want to modify will be displayed on the screen.
2. To change the state of a highlighting rule, click on the highlighting rule name and the highlight rule screen will appear.

On the highlighting rule screen, choose the “Inactive” to inactivate an active highlighting rule or choose the “Active” to activate an inactive highlighting rule.

3. On the Highlighting tab, make the necessary changes. Click OK.

4.5 **Deleting Highlighting Rules**

When you delete a highlighting rule, the reporting tool deletes the highlighting from the report table and the highlighting rule name from the Information area.

4.6 **To Delete a Highlighting Rule**

The following is the sample to delete a highlighting rule:

1. In the Information area, click on the name of the highlighting rule that you want to delete.
2. Click on the “Delete” button to delete the desired highlighting rule. The reporting tool deletes the highlighting rule from the Information area and from the report result.

5 **ADDING METRICS TO AN EXISTING ADHOC REPORT**

5.1 **To Add Metrics to a Report**

To add a metric to an existing report:

1. Select the Folder where the report is located.
2. Click on the name of the report to highlight the link for the report.
3. Click on the “Edit” button and the “Select Metrics” section will be the default section that is displayed on the screen.
4. Click on the “+” sign in front of the “Award – IDV Information” folder. Some sub folders will be displayed on the screen.
5. Click on the folder of the metric folder from where you want to add metrics. Do not click on the “+” sign from those sub folders; there are no more sub folders.
6. After clicking on the folder for those sub folders, some metrics will be displayed at the right-hand side. Click on the metrics that will be added to the report.
7. Click on the “Add” button for the desired metric. Multiple metrics can be added to the report. The selected metrics will be appearing in the box under the “Select Metrics” section.
8. To remove a metric from a report, select the metric that will be deleted from the report and then click on the “Remove” button.

9. To change the order of a metric in the report, click on the metric and then click on the Move Up or Move Down buttons. The order of the metrics in the report determines the order in which the metrics will be displayed in the report result.

10. Click on the “Save” button to save the report.

5.2 To Add an Attribute to an Existing Report

To add an Attribute to a report:

1. Select the Folder where the report is located.

2. Click on the name of the report to highlight the link for the report.

3. Click on the “Edit” button and then click on the section 2 – Select Attributes; the “Select Attributes” section will be displayed on the screen.

4. Click on the “+” sign in front of the “Award – IDV Information” folder. Some sub folders will be displayed on the screen.

5. Click on the folder of the attribute folder from where you want to add attributes. Do not click on the “+” sign from those sub folders; there are no more sub folders.

6. After clicking on the folder for those sub folders, some attributes will be displayed at the right-hand side. Click on the attributes that will be added to the report.

7. Click on the “Add” button for the desired attribute. Multiple attributes can be added to the report. The selected attributes will be appearing in the box under the “Select Attributes” section.

8. To remove an attribute from a report, select the attribute that will be deleted from the report and then click on the “Remove” button.

9. To change the order of an attribute in the report, click on the attribute and then click on the Move Up or Move Down buttons. The order of the attributes in the report determines the order in which the attributes will be displayed in the report result.

10. Click on the “Save” button to save the report.