



govSpend

# Mid Year in Review

2024 GovSpend Product Enhancements

# Agenda

- Major 2024 GovSpend Platform Enhancements:
  - Saved Search Alerts Customization
  - AI Meeting Transcript Summaries
  - AI Purchase Order Categorization using UNSPSC Codes
- General Search & Functionality Improvements
- Recap & Next Steps
- Resources

## 2024 Mid Year Review: GovSpend Product Enhancements

We released some exciting new enhancements to the GovSpend platform in the first half of 2024. The next few slides walk through those enhancements, how to find them, and general resources to learn more.

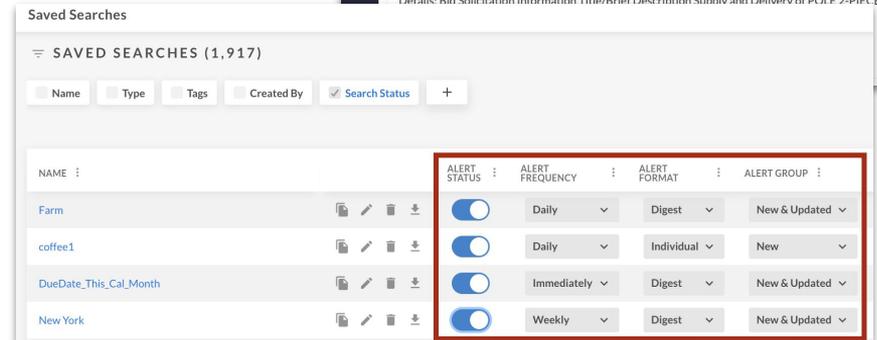
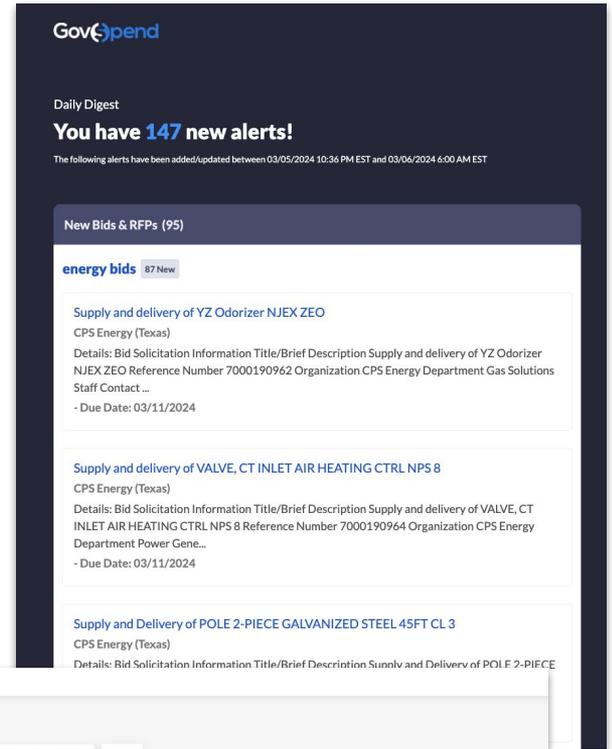
- Saved Search Alerts Customization
- AI Meeting Transcript Summaries
- AI Purchase Order Categorization using UNSPSC Codes

# Saved Search Alerts

## IMPROVED CUSTOMIZATION

Better manage your inbox! We know you love being notified when new results match one of your Bid or Purchase Order searches, but sometimes the number of emails can be overwhelming. We've added alert customization options for GovSpend saved search alerts so you receive them when you want them and how you want them.

- Manage your alert settings from one central location: [Saved Searches](#)
- Set alert preferences on a per search basis
- Customize frequency you receive email alerts: Immediate, Daily, or Weekly
- Set whether you receive a combined email digest of alerts or individual alert email per search
- Email Enhancements:
  - Improved formatting
  - Indication of # of new alert records
  - Keyword highlighting available on detail pages
- Review our [Release Notes](#), [Help Video](#) & [Help Documentation](#) for more information!



# AI Meeting Transcript Summaries

## ENRICHED CONTENT

Too busy to listen to and review the hours of meetings returned in your Meeting Intelligence search results? Use our AI generated meeting summaries for brief, executive overviews of meeting content and quickly determine which meetings are most relevant to you.

- Available in [Meeting Intelligence](#) for all meeting videos
- Summaries displayed on the results page and details page for all meeting records with an associated video
- Summaries generated with government contractors in mind, focusing on budget discussions, vendor evaluations, and open or upcoming RFP opportunities
- Search across meeting summaries using “Any Field” in the main search bar, which also searches across meeting transcripts, documents, and meeting title
- Search specifically within meeting summaries using the “Meeting Summary Contains” filter in your left set of filters
- Review our [Release Notes](#), [Help Video](#), or [Help Documentation](#) for more information!

The screenshot shows the Meeting Intelligence search interface. At the top, there is a search bar with a dropdown menu set to "Any Field". Below the search bar, there are several filters and buttons: "Show Raw Data", "Edit Inputs", "Reset All", "Save Search", "Save as New", "Export", "Share Search", and "Load Search". A search filter "roadwork (3)" is applied. The results section shows 3 results. The first result is "Regular Meeting" from Grayson County, Texas, dated 02/08/2022. The second result is "02/29/24 Finance Committee" from Warren County, New York, dated 02/29/2024. A red arrow points from the "roadwork (3)" filter to the "roadwork" text in the first result's summary.

The screenshot shows the Meeting Intelligence search interface with a different search filter. The left sidebar shows a filter "Meeting Summary Contains" with a search box containing "open bids (930)". The main results section shows 2 results. The first result is "Bid Opening - ITB 24-03-EN, April 23, 2024" from Town of Fort Myers Beach, Florida, dated 04/23/2024. The second result is "Lebanon, Indiana Board of Works Meeting 4/23/24" from City of Lebanon, Indiana, dated 04/23/2024. A red arrow points from the "open bids (930)" filter to the "opened bids" text in the first result's summary.

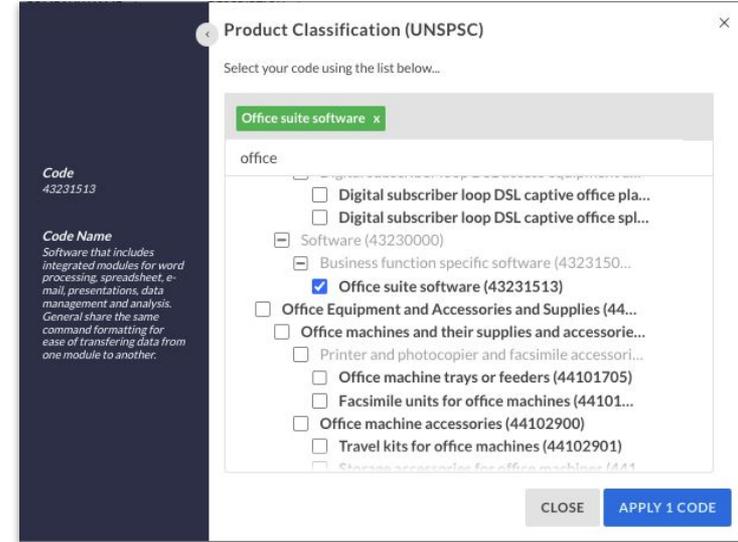
# AI Purchase Order Categorization

SEARCH MORE EFFICIENTLY

With over 1.4B PO line items in GovSpend, identifying actionable data can often feel like finding a needle in a haystack. We're here to help!

We've introduced AI to categorize and standardize purchase orders using the industry-standard UNSPSC Code system (product/service categorization system). Scrap the complex keyword combinations and get more relevant results with a simple filter!

- Available in [Spending](#)
- Filter your search results by product/service categories like Software or Office Supplies to get more actionable results using fewer keywords
- Search and identify relevant categories within the UNSPSC code system via a searchable hierarchy filter
- View the full hierarchy classification for each line item in your search results and export with the click of a button
- Review our [Release Notes](#) & [Use Cases Documentation](#) for more information!



Purchases	Agencies	Agency	Companies	Analytics		
142,570	12,274	Contacts	14,219	\$1.03 Billion		
<input type="checkbox"/>	ISSUED DATE	AGENCY NAME	COMPANY NAME	DESCRIPTION	QUANTITY	PRODUCT CLASSIFICATION(UNSPSC)
<input type="checkbox"/>	06/06/2024	Oneida County, Wisconsin	CDWG	MICROSOFT OFFICE LTSC STANDARD 2021	1	43000000 - Information Technology Broadcasti... 43230000 - Software 43231500 - Business function specific software 43231513 - Office suite software
<input type="checkbox"/>	05/31/2024	City of Fremont, Ohio	Dell Marketing	CSP NCE- Office 365	1	43000000 - Information Technology Broadcasti... 43230000 - Software 43231500 - Business function specific software 43231513 - Office suite software

## **Additional Enhancements:** **General Search & Functionality Updates**

We are constantly looking to improve the search experience in GovSpend, allowing customers to identify and review results most relevant to them as efficiently as possible. The following slides review highlights from our continued search and platform improvements.

- Issued Date Filter in Spending Module
- Search Keywords with Special Characters
- Enhancements to Contacts Search Module

# Spending “Issued Date” Filter

DEFAULT TO 'LAST 60 MONTHS'

To ensure efficient searching within Spending, returning the most relevant results, we've updated the default setting of the “Issued Date” filter to return results within the “Last 60 months” (or last 5 years). The filter can still be modified to pull in data outside of that 5 year range if desired.

## How to Find It:

- Navigate to the [Spending Module](#)
- The “Issued Date” filter is now defaulted to open so users can see the change in filter setting
- Default setting for this filter is now Rolling: Last 60 Months
- Users can modify the filter if they want to expand or collapse that time period for their search
- This applies on a going forward basis, previously saved searches are not impacted

The screenshot displays the 'Spending & POs' interface. On the left, the 'FILTERS' section is visible, with the 'Issued Date' filter expanded. A red box highlights the 'Issued Date' filter settings, which include radio buttons for 'Exact' and 'Rolling' (selected), and a dropdown menu set to 'Last 60 Months'. A red arrow points from the text 'New Default for "Issued Date"' to the 'Issued Date' filter. Another red arrow points from the 'Rolling' radio button to the 'Last 60 Months' dropdown. On the right, the 'SEARCH' section has a search bar and a dropdown menu set to 'Items'. Below the search bar, the 'RESULTS' section shows a summary for 'Purchases' with a value of '42.74 Million' and 'Agencies 23,824'. Below this, there is a table with columns for 'ISSUED DATE' and 'AGENCY NAME'. The first row shows '04/30/2024' and 'Madison County, Montana'.

# Search Keywords with Special Characters

## MORE FLEXIBLE SEARCHING

Based on customer feedback, we've updated search logic to allow keywords that include a subset of special characters. You can now create searches using keywords that contain any of the following:  
**+ - = & : / .**

### How to Find It:

- Navigate to the [Spending Module](#)
- In the main search bar type in a keyword that includes a period, for example "PM 2.5"
- Click "Search"
- The period is preserved and "PM 2.5" highlighted in results
- Repeat using a keyword that includes any of the following special characters: **+ - = & : / .**
- *Note:* This feature is available across **all modules** and special characters are preserved regardless of your other search settings (include word variations and fuzzy vs. exact)

The screenshot shows a search interface with a search bar containing 'PM 2.5'. Below the search bar, there are summary statistics for various categories: Purchases (3,874), Agencies (825), Agency Contacts, Companies (689), and Analytics (\$77.36 Million). The results are sorted by 'Issue Date'. A table lists search results with columns for 'ISSUED DATE', 'AGENCY NAME', 'COMPANY NAME', and 'DESCRIPTION'. A red arrow points from the search bar to the 'PM 2.5' text in the first result's description.

ISSUED DATE	AGENCY NAME	COMPANY NAME	DESCRIPTION
04/30/2024	Environmental Protection Agency, District of Columbia	Icf	R3 ESC <b>PM 2.5</b> AND TTP SERVICES UNDER BASE ESAT CONTRACT NUMBER 68HE0121D0002, OPTION YEARS 4 & 5
04/23/2024	South Coast Air Quality Mgt Dist, California	Sailbri Cooper	<b>PM2.5</b> Inlet
04/23/2024	South Coast Air Quality Mgt Dist, California	Sailbri Cooper	<b>PM2.5</b> Inlet

The screenshot shows a search interface with a search bar containing 'SPE2D2-24-R-0009 (2)'. Below the search bar, there are summary statistics for 'Report' and 'Results'. The results are sorted by 'Relevance'. A table lists search results with columns for 'POSTED DATE', 'DUE DATE', 'NOTICE TYPE', 'SOLICITATION ID', 'AGENCY NAME', 'TITLE', and 'DESCRIPTION'. A red arrow points from the search bar to the 'SPE2D2-24-R-0009' text in the first result's solicitation ID.

POSTED DATE	DUE DATE	NOTICE TYPE	SOLICITATION ID	AGENCY NAME	TITLE	DESCRIPTION
05/09/2024 03:39 PM	06/10/2024 03:00 PM	Solicitation	<b>SPE2D2-24-R-0009</b>	DEFENSE LOGISTICS AGENCY	Atenolol Tablets	Atenolol Tablets <b>SPE2D2-24-R-0009</b> Solicitation
03/13/2024 09:50 AM		Pre solicitation	<b>SPE2D2-24-R-0009</b>	DEFENSE LOGISTICS AGENCY	Atenolol Tablets	The Defense Logistics Agency is planning to issue a solicitation for a national requirements contract for Atenolol Tablets. Procurement details follow....

# CONTACTS MODULE

## SEARCH VIEW UPDATES

We've updated the search page in Contacts to be a table view like our other modules. Users can now more easily customize the view of their results with the ability to view up to 250 results at once, sort results, and modify columns in view.

### How to Find It:

- Navigate to the [Contacts Module](#)
- The search results now display as a table view
- Modify the number of results in view by using the pagination at the bottom of the table
- View the actual email, phone and address of the contact without having to navigate to the details page
- Use the 3 dot menu on any column to add, remove, or move that column
- Use the main search bar and filters to search
- *Note:* There's been no change to the default filters and the fields displayed in the search results
- Updated [Help Documentation](#)

RESULTS (8,142,130)

**Maria Mitra**  
Title: Administrative Services Manager II  
Department: Mental Health  
Agency Name: County of Los Angeles, California

📞 Copy Phone   📧 Copy Email   📍 Copy Address

**Josephine Nolasco**  
Title: Patient Financial Services Worker  
Department: Mental Health  
Agency Name: County of Los Angeles, California

📞 Copy Phone   📧 Copy Email   📍 Copy Address

Agency Name > teacher (4,838) x

Agency Type > Include Exclude

Search... FIND

- Select All Visible
- State Government 4,838
- Public School 1,016,480
- Local Government 24,190
- State University/College 6,662
- Federal Government 1,427
- Public Utility 150
- Public Hospital 82
- Correctional Facility 9

Showing 8 of 8

Agency State / Province >

Agency Radius >

Title >

ADD FILTER

RESULTS (4,838)

NAME	TITLE	DEPARTMENT	AGENCY NAME	EMAIL	PHONE	AGENCY ADDRESS
Malekka L Reedburg	Senior Pennn Prog REP	Customer Service	California State Teachers Retirement System (CalSTRS), California	mreedburg@calstrs.com	(916) 414-1155	100 Waterfront Place
Joseph R Trasvina	ASO Govrn Prog Anl	Customer Service	California State Teachers Retirement System (CalSTRS), California	jtrasvina@calstrs.com	(916) 414-1086	100 Waterfront Place
Ann Schmitt	Teacher	Rehabilitation Services	Illinois Department of Human Services, Illinois	ann.schmitt@illinois.gov	(217) 479-4255	401 S Clinton St
Kara Scott	Teacher		Indiana State Department of Correction, Indiana	kascott@idoc.in.gov	(812) 843-4291	302 W Washington St
Nicole Allen	Teacher	Rehabilitation Services	Illinois Department of Human Services, Illinois	nicole.allen@illinois.gov	(217) 479-4246	401 S Clinton St
William Artgis	Teacher		Indiana State Department of Correction, Indiana	wavtgis@idoc.in.gov	(765) 653-8441	302 W Washington St
Stuart Barney	Teacher / Education		Indiana State Department of Correction, Indiana	sbarney@idoc.in.gov	(574) 753-7571 ext. 4006	302 W Washington St
Neil Blower	Teacher Assistant		Indiana State Department of Correction, Indiana	nblower@idoc.in.gov	(765) 778-3778	302 W Washington St
Pamela Sardar	Teacher / Education		Indiana State Department of Correction, Indiana	psardar@idoc.in.gov	(317) 244-3387 ext. 293	302 W Washington St
Cornell Brewer	Teacher		Indiana State Department of Correction, Indiana	cobrewer@idoc.in.gov	(765) 653-8441	302 W Washington St
Jordan Butts	Teacher (Occu)		Indiana State Department of Correction, Indiana	jbutts@idoc.in.gov	(765) 653-8441	302 W Washington St

## RECAP & NEXT STEPS

- Refer to the various resources throughout this deck and on the next slide for additional information on all of these enhancements
- Get into GovSpend and check out the enhancements interesting to you!
- Reach out to your RM's for additional help or to learn more about any of these enhancements
- Send feedback our way, we want to hear from you!

- **Saved Search Alerts:**
  - [Release Notes/Help Video/ Help Documentation](#)
- **AI Meeting Transcript Summaries:**
  - [Release Notes/Help Video/ Help Documentation](#)
- **AI Purchase Order Categorization:**
  - [Release Notes/ Use Cases Documentation](#)
- **Search Functionality:**
  - [Contacts Module Help Documentation](#)

## RESOURCES

Check out the various resources listed here to learn more about the 2024 product enhancements!



**Thank you!**

**Kathryn Sanders**

E-Mail: [KSANDERS@GOVSPEND.COM](mailto:KSANDERS@GOVSPEND.COM)