| Solution | Government Requirements Management |
| --- | --- |
| Feature | ProcureSight+ Integration |
| Stakeholders | Huong Dang |
| Development Team | GSS |
| Product Manager | Amy Horton  Subash Narayana Bangaru |
| UX |  |
| Release | 2.3 |
| Target Release Date |  |

# Overview

Currently, Appian Solutions users must navigate to ProcureSight.com for public data searches, creating an inefficient, disjointed workflow. To enhance the user experience and create a more seamless environment, we propose integrating ProcureSight's capabilities directly into our core solutions (RM, CW, AM) through the ProcureSight+ offering.

This integration is a key strategic driver, as ProcureSight is already expanding our access to new agencies. With its AI-powered features and high attachment rate in new deals (ProcureSight+ or Enterprise), this initiative will deliver significant value and strengthen our competitive position.

# Use Cases

* As a Requestor, Requestor Manager, or Program Manager,,
  + I need to search for other agency’s opportunities and awards that are similar to the requirements I am working on, so that I can efficiently find details I need for developing my requirement package.
  + I need to save the results of my search to my requirement record, so that contracting has the insights I had during requirement package development.
  + I need to quickly search past government procurements for similar services or products, so that I can find example documents to accelerate my writing process.
  + I need to identify relevant psc/naics codes, so that I can accurately code my requirements package.
  + I want to save the results of my search to a collection, so that I can use the data and documents to help me with upcoming requirements.
* As a Contracting Officer, Contract Specialist or Contracting Manager,
  + I need to search for other agency’s opportunities and awards that are similar to the requirements I am working on, so that I can understand the acquisition path and mitigate protest risks.
  + I need to review vendor data for similar procurements, so that I can analyze vendor performance and market fit

## Use Cases Not Covered

* I need to be able to search for PCS/NAICS codes for upcoming requirements
* I need to be able to intelligently find a PCS/NAICS code for the requirement I am creating. Correct classification is a key data point the government gets wrong

# Terminology

# Assumptions

The ProcureSight team will deliver the following for the Requirement Management team to initially incorporate:

* Back end integrations for:
  + Procurement Search
* Reusable front end interfaces for:
  + Global search page with recent searches displayed below
  + Procurement results and expanded filter set
  + Ability to search on procurement titles, sow/pws text, or both
  + Inclusion of Protest data into Procurement search results
  + Procurement summary views
  + Links from Procurement summary view to Vendor summary view
  + Links from Procurement summary view to Codes summary view
  + Native AI document chat for procurement documents

# Functionality ()

## ProcureSight Site Tab

The “Search Procurements” tab of the ProcureSight Site tab needs to be refactored to use the new backend API for Procurement Search instead of the existing integration code.

1. Refactor existing tab to:
   1. Remove existing PS integration code
   2. Use “Global search page with recent searches displayed below” interface provide in the ProcureSight+ Module
2. Clicking the search button will send the term entered to the backend integration to get results back
   1. Results should be displayed using “Procurement results and expanded filter set” provided by the ProcureSight+ Module
   2. The user can access the “Add to Collection” and “Save to Requirement” Actions for each card result displayed
3. The user can click into one of the result cards to view the “Procurement Summary” provided by the ProcureSight+ Module
   1. All data for the procurement should display
   2. The links should be available for the Vendor Summary and the Codes Summary
   3. The user can click the links to view the “Vendor Summary” and “Codes Summary” provided by the ProcureSight+ Module
   4. The “Add to Collection” and “Save to Requirement” related actions are available
4. The user can click on a document from the ProcureSight+ search results, they should be able to chat with the document from the “Native AI Chat” provided by the ProcureSight+ Module

## Requirement Summary Insights Tab

This tab needs to be refactored to take into account the new interfaces. It currently has two tabs on it: “Procurements” and “Best in Class”

1. The summary tab “Insights” should be updated as below:
   1. The current "Insights" tab should be renamed to “Research”
      1. Rename tab showing saved procurements to “Bookmarks”
      2. Separate “Search” tab for ProcureSight search
      3. Separate “Documents” tab listing all the documents in the saved procurements
      4. (Stretch) Separate “Insights” tab to show insights on the saved procurements
   2. A separate tab in Requirement Summary for “Best in class”
2. The newly named “Search” tab should display the “Global search page with recent searches displayed below” provided by the ProcureSight+ Module
3. Clicking the search button will send the term entered to the backend integration to get results back
   1. Results should be displayed using “Procurement results and expanded filter set” provided by the ProcureSight+ Module
   2. The user can access the “Save to Requirement” Action for each card result displayed
4. When the user clicks, “Save to Requirement”, the results should be displayed or saved to the new “Bookmarks” tab
5. From the “Bookmarks” tab, the user can click into one of the result cards to view the “Procurement Summary” provided by the ProcureSight+ Module
   1. All data for the procurement should display
   2. The links should be able for the Vendor Summary and the Codes Summary
   3. The user can click the links to view the “Vendor Summary” and “Codes Summary” provided by the ProcureSight+ Module
   4. The “Save to Requirement” related actions are available
6. The user can click on a document from the ProcureSight+ search results, they should be able to chat with the document from the “Native AI Chat” provided by the ProcureSight+ Module
7. The ability to remove the saved procurement from the requirement should operate as it does today.
8. The “Best in Class” tab should remain as it does today

## ProcureSight Collections tab

The collections tab would be updated as follows:

1. Update the UX for the collections grid page as per mockup
2. Update the UX for Collection summary page and it will have 3 tabs as follows:
   1. Bookmarks tab listing the procurements saved to the collection
   2. Separate “Documents” tab listing all the documents from the procurements in the collection
   3. (Stretch) Insights tab based on the procurements in collection

## Execution notes (Rough)

| Use case | Action | Implementation |
| --- | --- | --- |
| An RM user can search for past procurements, vendors, code and protests so that they can do market research for their requirement | Procurements search using the standalone ProcureSight tab | App refs provided by PS+ team |
| Save procurements to a collection or save to a requirement | In the search results page PS+ will provide the ability to “pass” in the related actions. We will use this to enable the “add to collections” and “save to requirement” existing actions. |
| Create New Collection | Retain existing code base or take code from PS+ |
| View Collection list | Retain existing code base or take code from PS+ |
| View Collection insights | Take code from PS+ |
| Procurement Summary from Search result or Collection | App ref? (Confirm with PS+ team) |
| An RM user, when creating a requirement, they are able to see similar past procurements that could be useful for them so that they can review and take relevant information from these procurements. | Requirement creation confirmation screen - View Past Procurement recommendations | UX changes |
| Requirement Summary - Viewing Best in class and Procurements tab | UX changes |
| Requirement Summary - View Past Procurement recommendations and saved procurements | UX changes |
| Requirement Summary - View procurement Search results | Use App ref |
| Requirement Summary - View procurement Search results and save procurement to a requirement | Reuse existing action |
| An RM user is able to take a reference document and use AI to create a new document for their requirement, saving them time | Create new document using AI | TBD |

Priority for 31 Oct Release:

* Search procurements using PS+ module (using App ref)
* Add procurements to collections or requirements (actions that can be passed into above app ref)
* Manage collections - Create/Update/View
  + UX revamp for summary view includes Insights
* Requirement Summary changes:
  + Recommended procurements UX revamp
  + Insights tab UX revamp
    - Change in navigation
    - UX changes for bookmarks
    - UX changes for Search
    - Introduce Insights
* Ability to create document using AI - standalone functionality - Use entrypoint

Module wise interface, data and integration ownership and notes

| Module | Interface | Action | Data | Integration |
| --- | --- | --- | --- | --- |
| Procurement Search | Search and results with Procurement Summary | Add to Collection  Save to Requirement | Data from API call shown | Data service call for opportunity search |
| Collection | Collections Grid  Collection Summary  Procurement Summary | Create Collection  Update Collection  Delete Collection | Collection wise opportunities and its fields | Nightly sync handled within PS+ |
| Saved Requirements | Req Summary tab  Procurement Summary | Save to Requirement  Remove from Requirement | Requirement wise opportunities and its fields | Nightly sync handled within PS+ |
| Recommended Procurements for Requirement | Recommendation banner | None | Top 3 search results on Requirement title | Data service call for opportunity search |
| Procurement Document Chat |  |  |  |  |
| Create document using AI |  |  |  |  |

# Knowledge Artifacts

# [Feature Spec: PS+ Public Data Services](https://docs.google.com/document/d/1Wu8eT5KBaRtrOo5meafmbZv1pMv86gN_g12U__7dTUA/edit?tab=t.0)

# [PS+: Solutions Scope Document](https://docs.google.com/document/d/1LfDSGXcI1DquxngJ-JfMNPCcH3aTJbe44XO-Ad0WUMI/edit?tab=t.0)

# Mockups

Standalone ProcureSight search: [Link](https://eng-test-fed-aq-dev2.appianpreview.com/suite/sites/requirements-management-ux/group/procuresight/page/search-procuresight)

Requirement Summary - [Link](https://eng-test-fed-aq-dev2.appianpreview.com/suite/sites/rm-branding/page/research)

# Success Criteria

# Metrics

# Dogfooding

Not currently a candidate for dogfooding.

# Decisions/Open Questions