



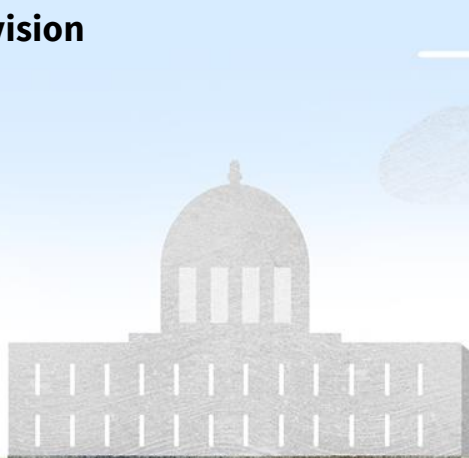
U.S. General Services Administration

Q3 Stakeholder Forum: User Roles

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Housekeeping items



Use the Q&A tool for questions. We will send a link to the slides afterwards.

System for Award Management | For People Who Make, Receive, and Manage Federal Awards

Agenda

- Welcome
- Introducing SAM.gov
- Why do we have roles?
- What roles do entity users have?
- How do I get a role?
- How do I give other users a role?
- Q&A



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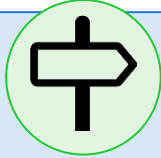
Welcome!

- Salomeh Ghorbani Background
- Attend future Stakeholder Forums
 - Email your questions to [IAE Outreach](#)
- Help test SAM.gov
 - Email the [User Acceptance Testing](#) group
- Learn the latest about SAM.gov
 - Register for our [blog](#)
- Contact FSD.gov when you need help



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INTRODUCING...



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What is SAM.gov?

SAM.gov is an official U.S. government website. There is no cost to use SAM.gov. You can use this site to:

- Set your organization up for eligibility to apply for federal grants and bid on federal contracts.
- Set your organization up for eligibility for subawards and subcontracts.
- Update, renew, or check the status of your entity registration.
- Search for entity registration and exclusion records.
- Search for assistance listings, wage determinations, and contract opportunities.
- Run reports on contract data, contract opportunities, and other data sets.
- View and submit BioPreferred and Service Contract Reports.
- Access data via extracts and application programming interfaces (APIs).

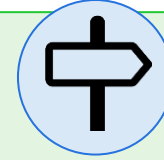


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Why do we have roles?

SAM.gov has a vast amount of sensitive organizational data. Roles limit who can put information in the system or change what's there. Roles also let certain users delete information.



In this section...

- Use SAM.gov without an account
- Sign in with an account and without a role
- Sign in with a role

What can you do without an account?

Without an account, you can search and view:

Term	Definition
Contract opportunity notices	Official U.S. government actions to solicit work.
Wage determinations	Legally mandated wages federal contractors must pay their employees based on the county where work is performed.
Assistance listings	Detailed, public descriptions of federal grants, loans, scholarships, insurance, and other types of financial assistance available.
Federal hierarchy	The authoritative directory for managing and referencing federal funding and awarding organizations. It establishes the relationships between the departments within each agency.
Exclusions	Identify parties excluded from receiving federal contracts, certain subcontracts, and some types of federal financial and nonfinancial assistance and benefits.
Responsibility/qualification records	Information to support award decisions as required by the Federal Acquisition Regulation (FAR).
Static contract data reports	Contract activity information formatted to meet the needs of both government and public users.
Some data extracts	A file containing data, often a complete data set.



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What can you do with an account but without a role?

- **Follow Records:** Lets you choose records to “watch” in contract opportunities, wage determinations, assistance listings, entity registrations, and exclusions.
- **Save Searches:** Provides ability to add those searches to your profile so you can run the same search again.
- **Access Downloads:** Provides ability to save search results for further analysis or refinement.
- **View Entity Information:** Provides ability to see entity information, which is public and viewable on SAM.gov unless they opt out of the public search.
- **View and Run Reports:** Provides ability to view detailed information on awarded contracts and associated modifications.



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What can you do with a role?

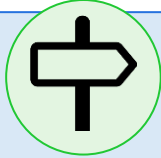
Roles are connected with your entity and let you:

- Access non-public data about your entity
- Perform certain tasks like:
 - Updating your entity's registration
 - Joining the interested vendors list of a solicitation
 - Submitting report on behalf of an entity.



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In this section...

- Understand roles and permissions
- Learn about domains
- Understand how roles work with entities and entity hierarchies

What roles do entity users have?

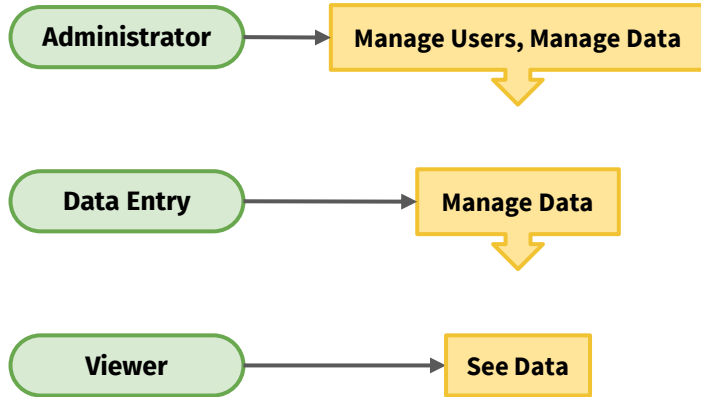
There are three roles for entity users

- Viewer
- Data Entry
- Administrator

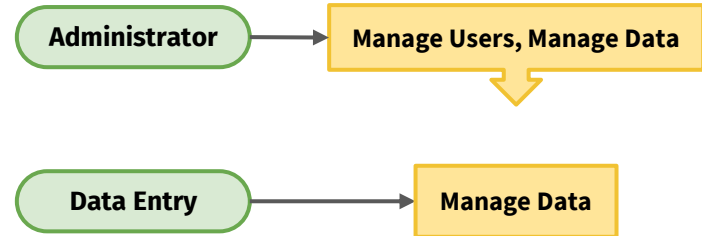
Role Permissions

Administrator roles let you manage both people and data; other roles only let you manage or see data.

Entity Registration and Contract Opportunities



Entity Reporting





Roles by domain

A domain is a functional part of SAM.gov associated with a certain kind of information. To do tasks in a domain, you need a role in that domain.

Entity users can access:

- Entity registration
- Entity reporting
- Contract opportunities

Roles in each domain

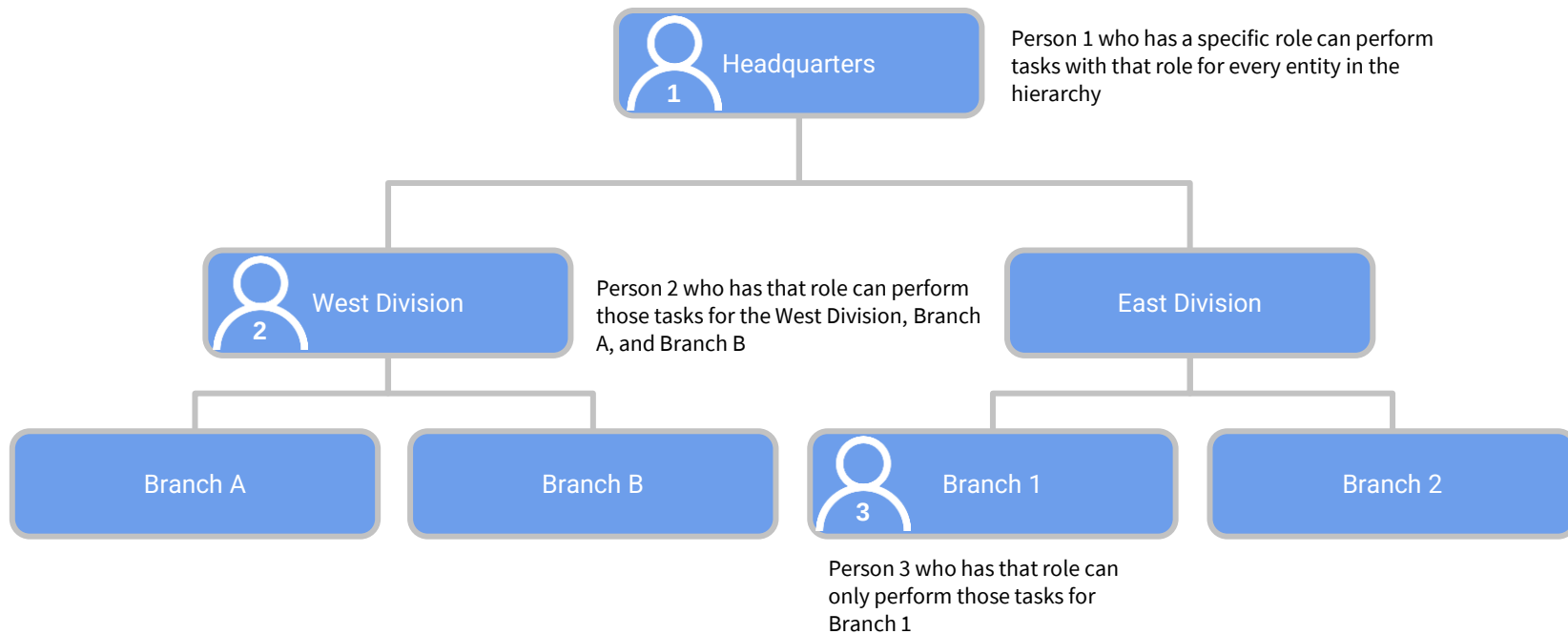
Roles	Domains	Entity Registration	Entity Reporting	Contract Opportunities
Viewer		View all data for entity registration in any status	n/a	- Request to view controlled attachments - View interested vendor lists
Data Entry <i>All Viewer tasks plus</i>		- Update registration - Delete work in progress registrations	- Create, edit, and delete BioPreferred reports - Upload, create, edit, and delete Service Contract Reports	Join interested vendor lists
Administrator <i>All Data Entry tasks plus</i>		- Assign and remove roles - Deactivate registration - View, approve, and reject registrations for child entities in your hierarchy - All Data Entry tasks for entity reporting	Assign and remove roles	Assign and remove roles

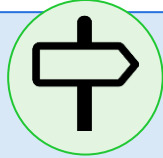
Roles are associated with an entity

- Whatever your role lets you do, you can only do those tasks for the entity for which you have the role.
- You can have roles with more than one entity.
- You can have the same or different roles with different entities.
- You can't have two different roles with the same entity for the same domain.
 - You can't be a Viewer and an Administrator, for example.



Roles in an entity hierarchy





In this section...

- Register a new entity
- Ask your Entity Administrator
- Request a role
- Submit an Entity Administrator Appointment Letter

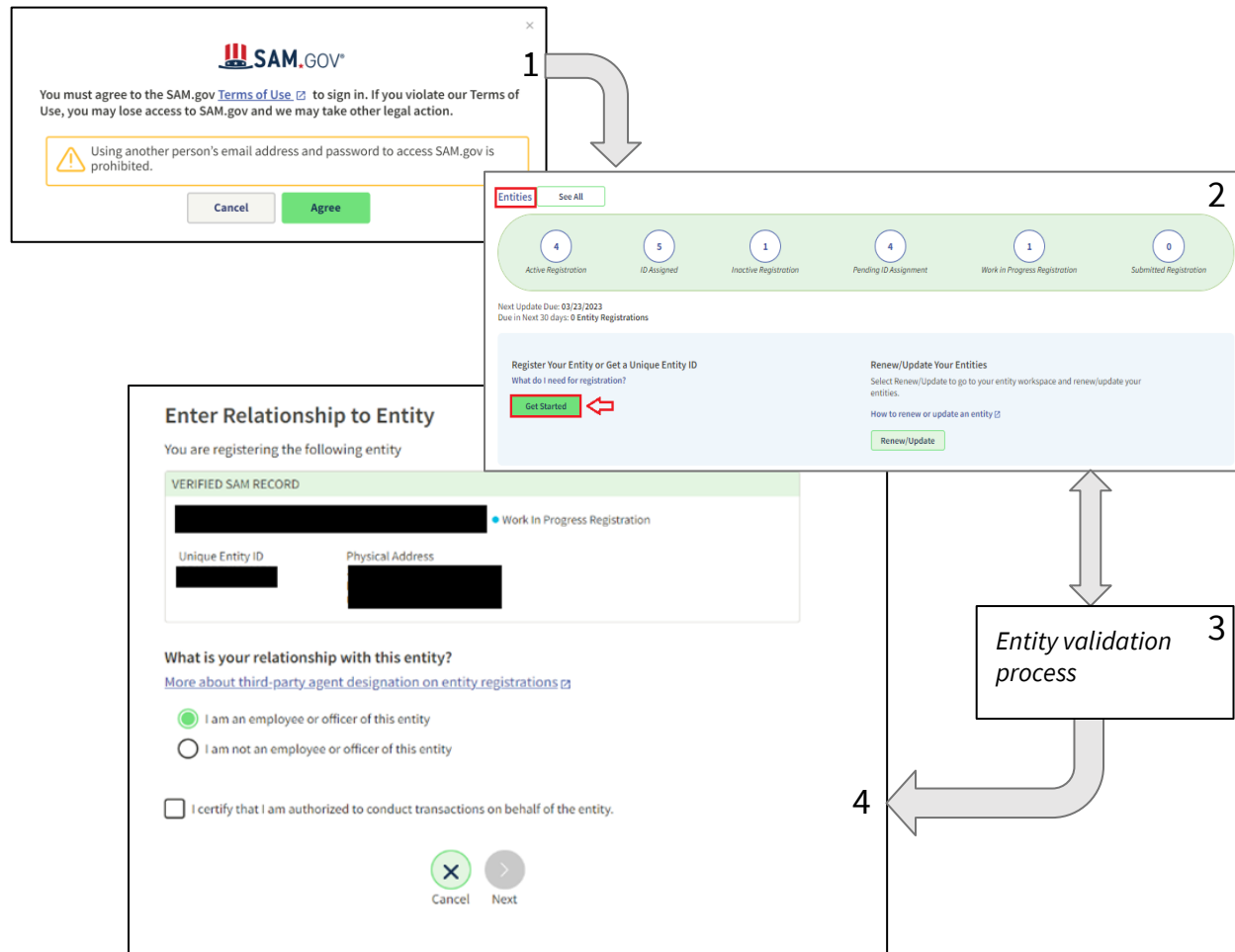
How do I get a role?

There are ways to get a role using tools in SAM.gov, and you can ask someone in your organization or the help desk.

In the system: Register a new entity

Sign in and select **Get Started**. After you find and validate your entity, you say whether you are an employee.

The system assigns you a role based on how you complete the form.



Outside the system: Ask your Entity Administrator

If you need an administrator role in any domain, you must request it directly from an existing administrator. You cannot request administrator roles in the system.

Entity Administrators perform a variety of tasks on behalf of their entity. One of their most important tasks is managing other users. It is encouraged for you to have multiple administrators for your organization.

They are also responsible for renewing entity registration in SAM.gov. Entities with a single Entity Administrator are at risk for “orphaned” records if that user leaves without assigning another Entity Administrator beforehand. Orphaned records can cause:

- Expired registration, which means they cannot do business with the federal government.
- Delayed work while trying to assign a new Entity Administrator.



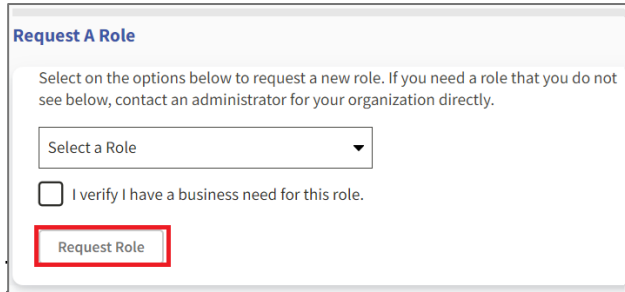
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In the system: Request a role

The Workspace **Request A Role** area is how you request new roles.

1. Select a Viewer or Data Entry role and select the **Request Role** button.
2. Complete the fields on the **Request Role** screen.
3. Select **Submit**.



Request A Role

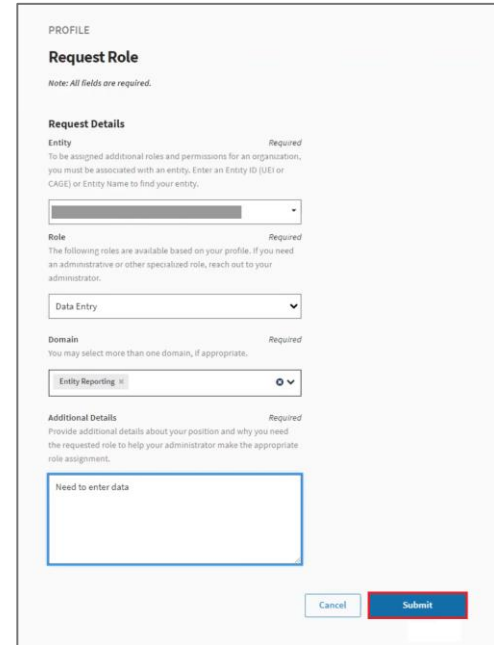
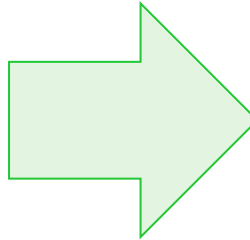
Select on the options below to request a new role. If you need a role that you do not see below, contact an administrator for your organization directly.

Select a Role ▼

☐ I verify I have a business need for this role.

Request Role

after you sign in to SAM.gov.



PROFILE

Request Role

Note: All fields are required.

Request Details

Entity Required
To be assigned additional roles and permissions for an organization, you must be associated with an entity. Enter an Entity ID (UEI or CAGE) or Entity Name to find your entity.

Role Required
The following roles are available based on your profile. If you need an administrative or other specialized role, reach out to your administrator.

Domain Required
You may select more than one domain, if appropriate.

⊕ ⊖

Additional Details Required
Provide additional details about your position and why you need the requested role to help your administrator make the appropriate role assignment.

Outside the system: Submit an Entity Administrator Appointment Letter

An entity employee, officer, or board member can send the Federal Service Desk a request to become an administrator for your entity if:

1. The **only** administrator has left the organization.
2. Your entity is registered, but there is no administrator in your organization.
3. The Entity Administrator has lost access to their account.

In these cases, complete the correct [Entity Administrator Appointment Letter](#), have it notarized if necessary, and submit it to the Federal Service Desk at fsd.gov.

This process can be time consuming, but it is important. It helps prevent someone from outside your entity gaining access they should not have. To keep this from happening, you should always have multiple Entity Administrators.

This is the only way the Federal Service Desk can help give you a role. If your entity has an administrator, they must grant you your role.

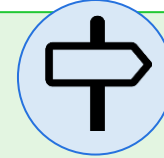


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As an Entity Administrator, how do I give other users a role?

You can approve user's role request or assign a role to that user.



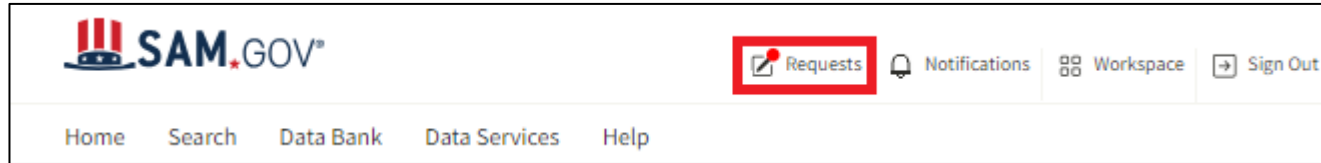
In this section...

- Approve a role request
- Directly assign a role

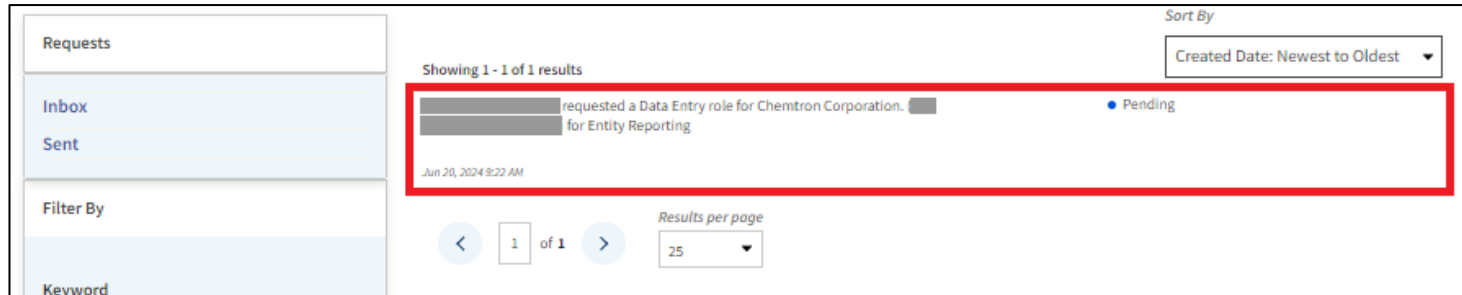
Approve a role request

When a user requests a role, it will display in **Requests** for the Entity Administrator.

1. Select **Requests** from the header.



1. From your **Requests Inbox**, select the user you want to approve.



Approve a role request

- From the **Role Request** screen, enter any comments.
- Select the **Assign Role** button.

Workspace / Requests / Role Request
WORKSPACE

Role Request

User: [Redacted] Pending
Entity: [Redacted] 9:22AM
Role: Data Entry
Domain: Entity Reporting
Requester Comments: Need to enter data
Additional Information Required
Comments are required for rejection. Only comments provided for a role rejection will be saved.

Comments here [Redacted]

Back Reject **Assign Role**

Comments

Approve a role request

5. In the **Entity Affiliation** section, select whether the user is an employee.
6. From the **Entity Selector**, enter the Unique Entity ID for the entity.
7. In the **Additional Information** section, enter a comment.
8. Select the **Assign** button.

User: [Redacted]

Entity Affiliation
Select whether the user is or is not an employee or officer of one or more of your entities.

☒ Employee, officer, or board member
☐ Not an employee, officer, or board member

Entity Selector
Enter a Unique Entity ID, CAGE, or legal business name to locate and select an entity. For employees or officers, you can select more than one entity.

[Redacted] [v]

Role
Select a role to assign. The roles you see are the available roles based on the affiliation you selected for this user.

Date Entry [v]

Domains Required
Select a domain for the role.

Entity Reporting [v]

Permissions
The permissions below are typical for the selected role/domain combinations.
Note: Users do not see these permissions when requesting a role.

Entity Reporting

BIOPREFERRED REPORT	SERVICE CONTRACT REPORT
☒ Delete Biopreferred Report	☒ Upload Service Contract Report
☒ Edit Biopreferred Report	☒ Delete Service Contract Report
☒ Add Biopreferred Report	☒ Edit Service Contract Report
	☒ Add Service Contract Report
	Subaward Reporting
	☐ Create Edit Delete Subaward Report

Additional Information Required
Provide details to help the user know who assigned this role and why. The user will be able to see these details.

Comment here [Redacted]

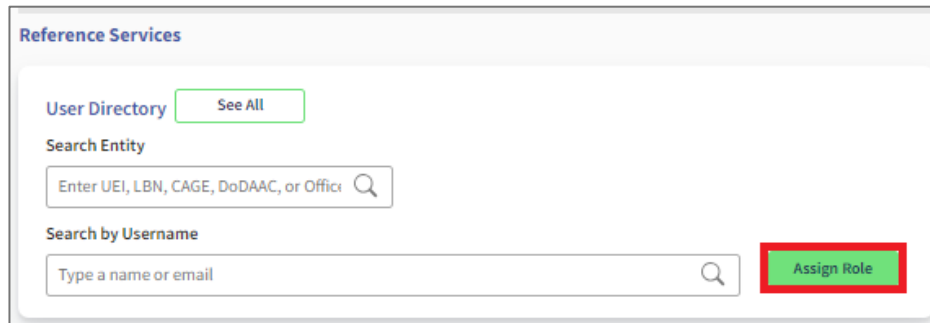
[Cancel] [Assign]

Directly assign a role

Entity Administrators can assign roles to other users. This lets you grant access to your entity directly without waiting on the user to request it. If you need to give someone an administrator role, you **must** assign it; they cannot request it.

The user must still accept the role.

1. From your **Workspace**, scroll to the **User Directory** widget.
2. Select **Assign Roles**.



The screenshot shows a web interface titled "Reference Services". Below the title, there is a "User Directory" section with a "See All" button. Underneath, there is a "Search Entity" section with a search bar containing the placeholder text "Enter UEI, LBN, CAGE, DoDAAC, or Office" and a magnifying glass icon. Below that is a "Search by Username" section with a search bar containing the placeholder text "Type a name or email" and a magnifying glass icon. To the right of the "Search by Username" search bar is a red button labeled "Assign Role".

Directly assign a role

3. Complete the **Assign Role** form.
4. Select **Send Invitation**.
5. When the user next signs in to SAM.gov, they can accept the role.

Assign Role

All fields are required. Once you complete and submit this form, the user will be notified of the new role and will be able to use it immediately.

Email Address

Enter the user's email address. Additional form fields will become available once an email has been entered and validated.

Entity Affiliation

Select whether the user is or is not an employee or officer of one of more of your entities.

- ☒ Employee, officer, or board member
☐ Not an employee, officer, or board member

Entity Selector

Enter a Unique Entity ID, CAGE, or legal business name to locate and select an entity. For employees or officers, you can select more than one entity.

Role

Select a role to assign. The roles you see are the available roles based on the affiliation you selected for this user.

Domain

Select a domain for the role.

Business Justification

Provide details to help the user know who assigned this role and why. Users will be able to see these details in their feed, under Role Assignment in the field labeled "Additional Information."

Cancel

Send Invitation





U.S. General Services Administration

Questions?

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