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1. Introduction

The purpose of this guide is to help both federal and non-federal users with requesting and managing user roles in SAM.gov. This guide specifies actions required to obtain and administer roles. Roles are required to view non-public data, manage users, or manage data.

2. Types of Users

When you select "Sign In" and create an account, you are either a federal user or a non-federal user.

A federal user is someone acting in the capacity of a federal employee on behalf of an agency. To be recognized as a federal user, you must have an email domain related to a department or independent agency in the SAM.gov federal hierarchy, and your email address must end in .gov, .mil, .si.edu, .dodea.edu, or uhuhs.edu.

All other users are classified as non-federal.

Only federal users can be granted federal roles or access for official use only (FOUO) data. Please remember that users *sign in* to the site; an entity *registers* to do business with the government. To register an entity, you must first have a user account.

In addition, a user account is for a person, not a system. If you manage a system that needs to interface with SAM.gov for large volumes of data please see the System Account User Guide.

3. Basics of Roles

Key terms:

- **Domain**. A domain is a functional area of SAM.gov that consists of a specific type of data. For example, data about entities is known as the entity information domain. It contains entity registration data and exclusions data, which are each subdomains. Contract opportunities is another domain that contains all notices posted to SAM.gov.
- **Federal Hierarchy**. The federal hierarchy is defined in this FAQ.
- **Entity Hierarchy**. An entity hierarchy exists when a company has subsidiary companies or components that are registered as entities in their own right (for example, Company A may be an entity that has an Aeronautics Division registered as its own entity and a Construction Division registered as a third entity). The highest-level entity is referred to as the "parent entity" and the others as "child entities."

You do not need to be signed in or to have a role to view public data. You do need to be signed in to see some data, such as entity registrations, and to access some functionality, such as following items and saving searches.

Roles in SAM.gov allow you to manage data within a domain or functional area and support authorized actions.

Roles in SAM.gov are assigned by **domain**, or functional area. For example, you may be assigned an Administrator role in assistance listings, but not in contract opportunities. What the roles allow is different from domain to domain. For example, an Assistance Listings Administrator cannot do the same things that a Contract Opportunities Administrator can do. You may have the same role in more than one domain. You can find a complete list of roles in SAM.gov here.

Roles are also assigned by **organization**. For federal organizations, this means that your role applies within your department or independent agency, sub-tier, or office. You can perform the tasks that your role allows within the organization for which the role is assigned. You can have a role for more than one organization. For example, you might have a Contract Opportunities Administrator role in two offices in the same sub-tier. For non-federal organizations, roles apply within one or more entities. For example, if you are an Entity Registration Administrator, you can modify entities for which you have that role, but not other entities.

Permissions define what a role can do. Some permissions are always part of the role. Others can be removed or added by an administrator.

3.1 Federal Administrator Roles

All federal roles flow from an Administrator at the department or independent agency level. Administrator roles cannot be requested by a user through the system, but must be initiated by someone who has an Administrator role.

If you need an Administrator role, then you need to contact a current Administrator. You can find the current Administrators by following the steps here.

If there are no current Administrators for your agency, you need to create a ticket with the Federal Service Desk (fsd.gov) and attach the documentation listed below to become a domain Administrator for your agency. If a higher level Administrator is found, you will be directed to contact that individual instead.

Each domain has different requirements to ensure the highest level Administrator assigned has authority for the work being completed by the agency. For all domains except entity registration, the requirement is a signed letter by the department or independent agency official listed below stating the name and email for the user being assigned the Administrator role and stating the department or independent agency's name and code.

- **Assistance Listings**: Senior Grants Executive (or similar executive)
- **Contract Opportunities**: Senior Procurement Executive (or similar executive)
- **Contract Data**: Senior Procurement Executive (or similar executive)
- **Entity Registration**: Agency name, Unique Entity ID, the name of the previous administrator, and the name of the new administrator

- **Exclusions**: Suspension and Debarment Official (or similar executive)
- **Federal Hierarchy**: Senior Accountability Official (or similar executive)
- **System Accounts**: Chief Information Officer (or similar executive)

3.2 Non-Federal Administrator Roles

All non-federal roles flow from an Administrator either at the entity or, if the entity is part of a hierarchy, at the parent entity. Administrator roles cannot be requested through the system; they must be granted by someone with an Administrator role.

To get an Administrator role at an entity, you must submit an authorization letter confirming your permission to serve as an Administrator for your entity. (More detailed information on authorization letters can be found in this FAQ.)

There are three exceptions to the authorization letter.

1. If you are registering a new entity that is not part of a hierarchy, you will receive the Administrator role in the Entity Registration and Entity Reporting domains as part of the registration process.
2. If your entity is part of a hierarchy and there is an Administrator at a parent entity, that Administrator can validate your request. You can activate a request by starting to register your entity if it is not already registered, or by requesting a lower role in the system and stating in the comment that you are requesting an Administrator role.
3. If your entity is not part of a hierarchy and there is an Administrator at your entity, that Administrator can invite you to be an Administrator. Contact the Administrator outside the system to request the invitation.

You will not have the Administrator role and its associated permissions until one of the following is complete:

- A parent entity Administrator grants you the role,
- A current Administrator for your entity grants you the role, or
- Your authorization letter is approved.

Once one of these validations is completed, you will have the Administrator role in the Entity Registration and Entity Reporting domains.

4. Role Permissions

Each role assigned has associated permissions that enable you to perform certain tasks. Permissions define the specific things a person with the role can do. Each permission is one of the following.

- Inherent. The permission is always enabled for the role and cannot be disabled.
- Removable. The permission is enabled by default, and can be disabled by an administrator on assignment (or at a later time).

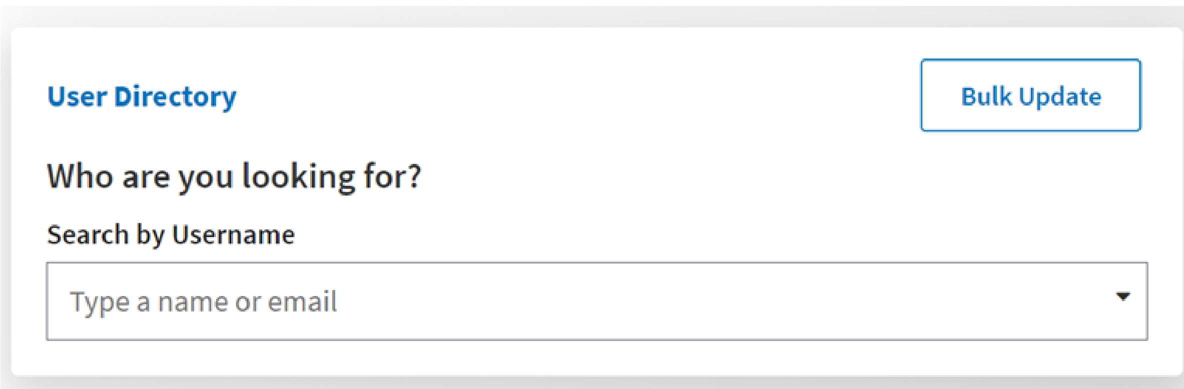
- Addable. The permission is disabled by default, and can be enabled by an administrator on assignment (or at a later time).

For example, an Agency Administrator Entity Management in the entity registration domain can always register a federal entity. They can also be allowed to view for official use only (FOUO) entity data.

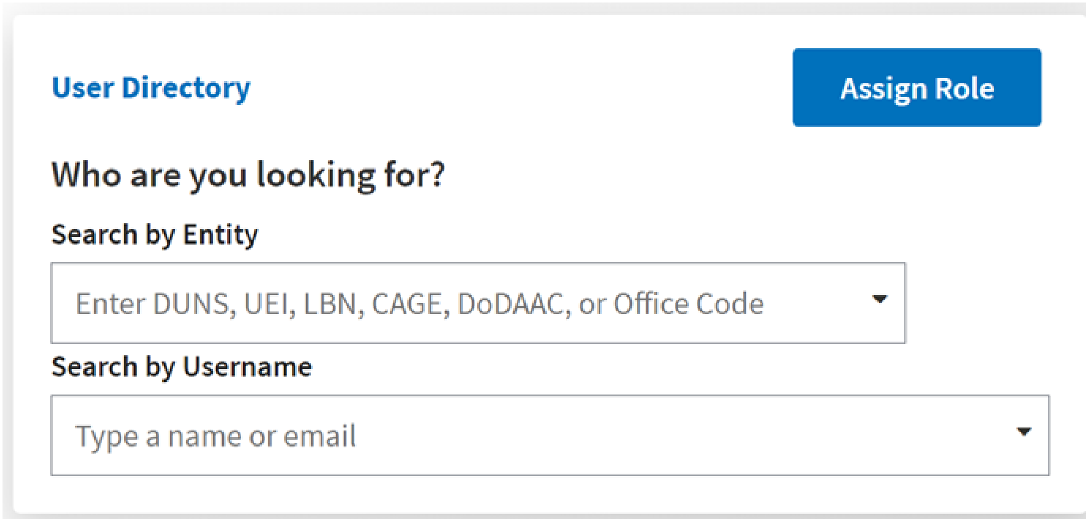
5. User Directory

The User Directory, found in your Workspace, provides details about all of the users in your organization who have created accounts in SAM.gov, and is available to all Federal users and all Administrators in that organization.

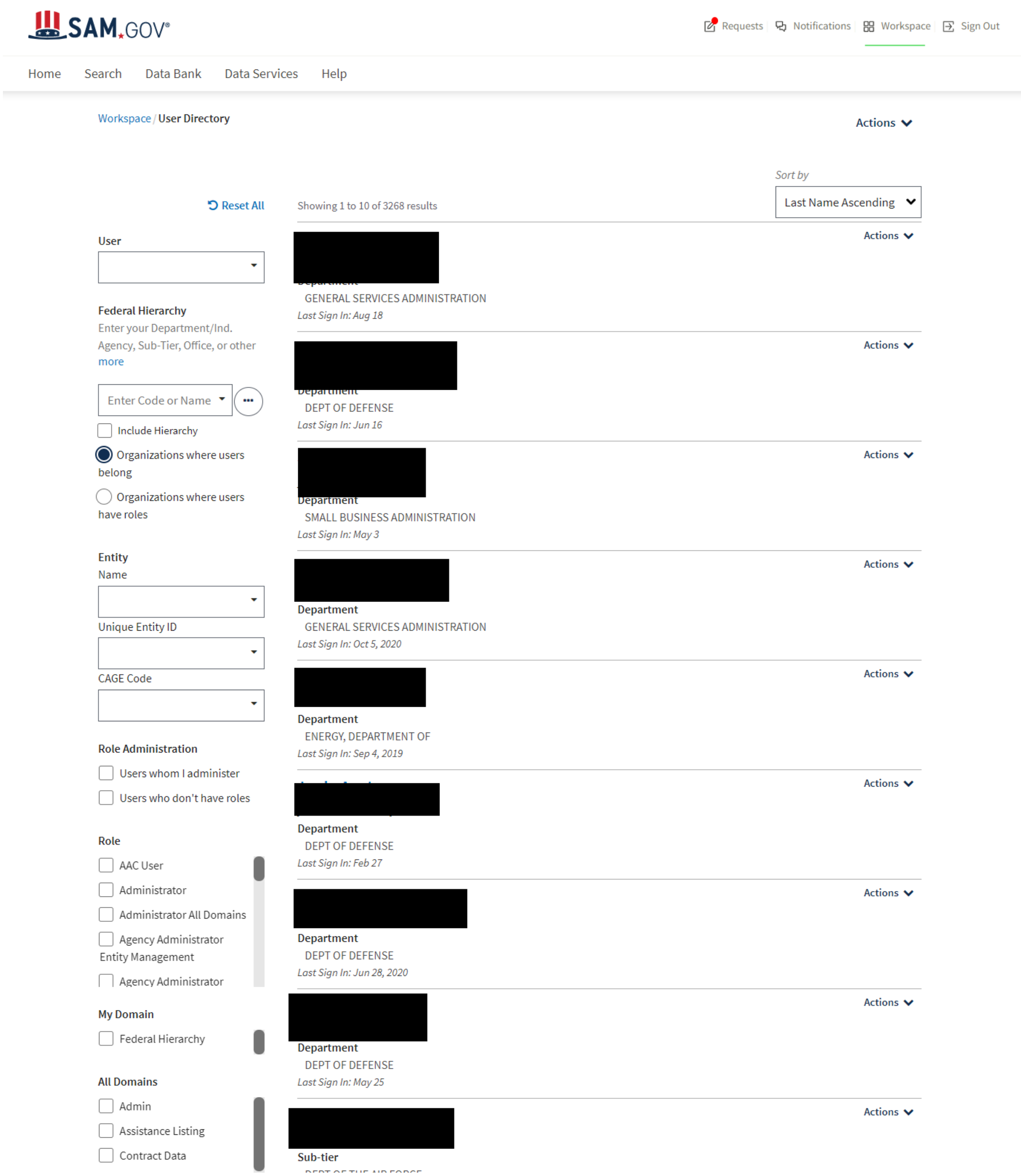
For federal Administrators, the User Directory lists all users in your department or independent agency and can be used to find other Administrators or other types of users. The User Directory can help you find out where other users belong in your organization and what roles they have, in addition to other user details.



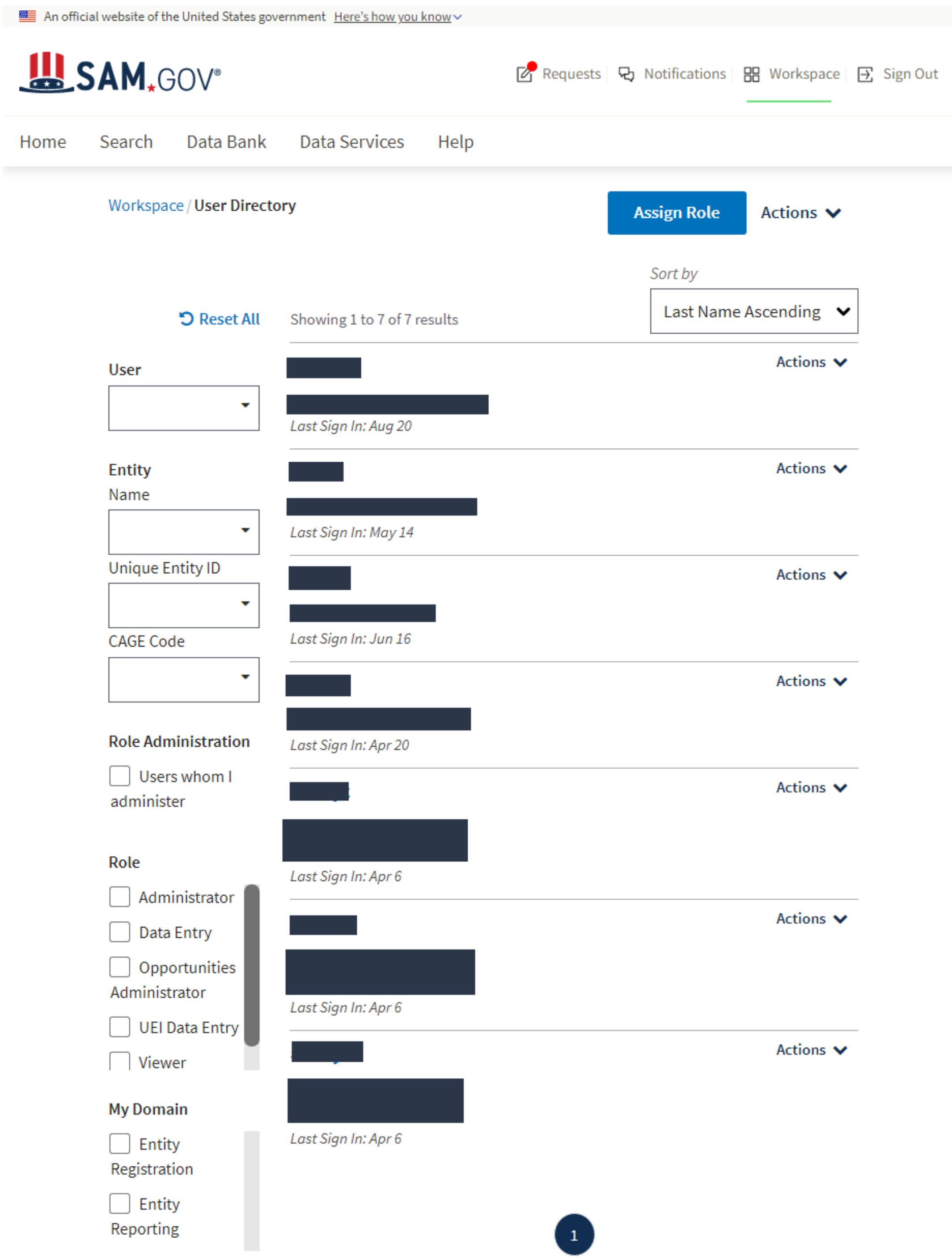
The User Directory shows non-federal Administrators users with roles in the entities you manage, as well as any child entities. If you manage a large number of entities, you can use the User Directory filters to help find particular users.


User Directory
Assign Role
Who are you looking for?
Search by Entity
Enter DUNS, UEI, LBN, CAGE, DoDAAC, or Office Code
Search by Username
Type a name or email

The User Directory only displays those individuals who have created an account in SAM.gov. Use the filters and key words in the User Directory to narrow your search. Only Administrators can assign roles. The federal User Directory, shown below, can filter on a user's email address, the user's place in the federal hierarchy, federal entity, role (or no role), and domain.



The non-federal User Directory, shown below, can filter on a user's email address, entity, role, and domain.

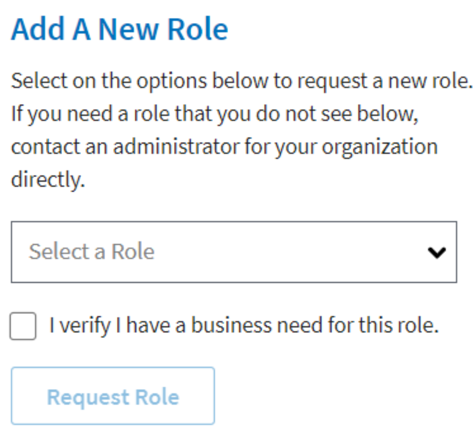


Federal and non-federal Administrators can download User Directory search results in CSV or PDF format by selecting the "Actions" menu at the top of the search results.

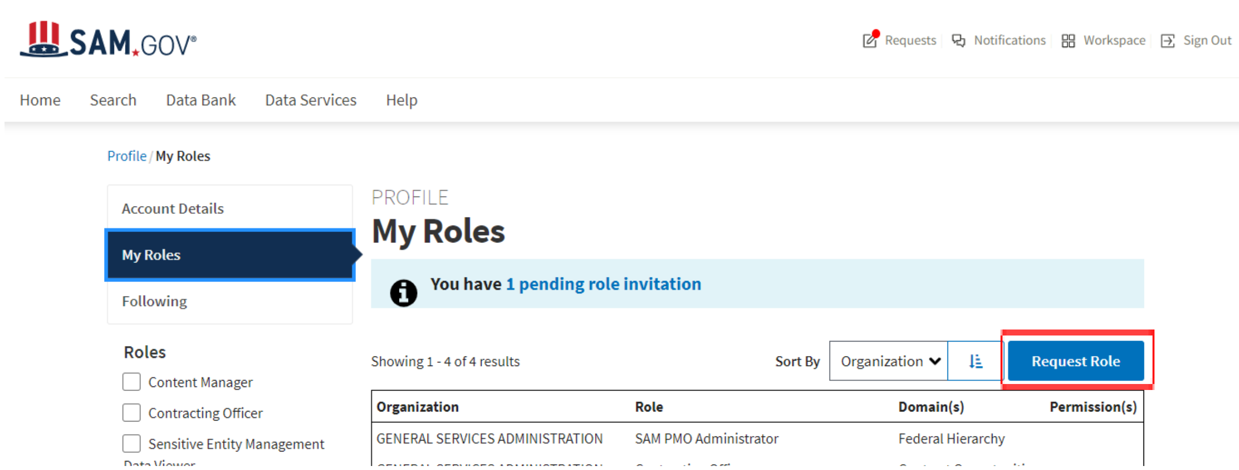
6. Request a Role

To request a role, select "Workspace" from the header of any page to go to your personalized work area. If you do not see the "Workspace" link, sign in to the site.

There are two ways to request a role in your Workspace. The first is to scroll down on the main Workspace page to the "Add A New Role" area.



The second is to select the "Profile" link and go to the My Roles section. There is a "Request Role" button available above the list of roles. Either option will open a role request form where you can provide information and submit your request.

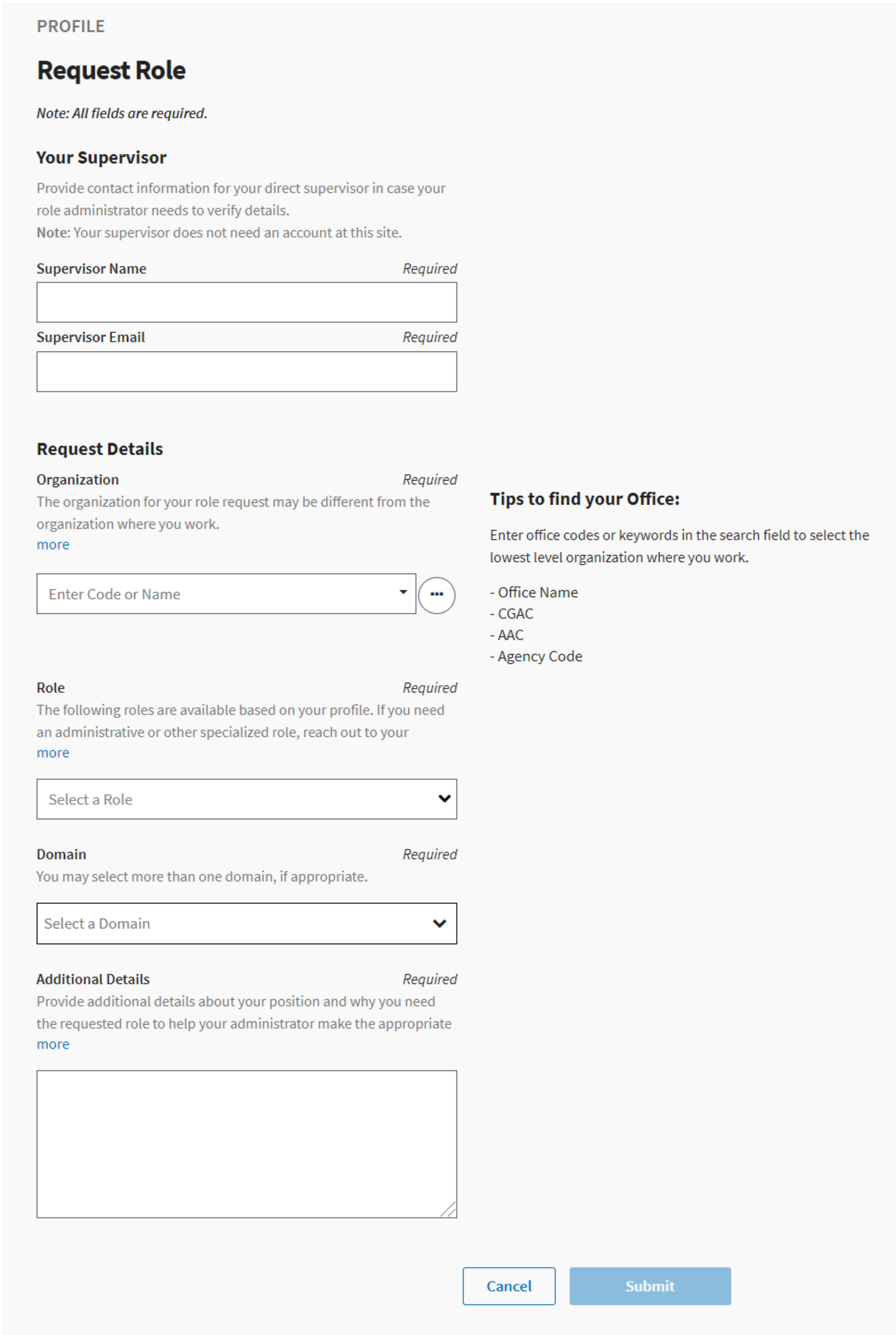


The form will only show available options, so a non-federal user will only see non-federal roles and a federal user will only see federal roles. To see the complete list, please refer to [this FAQ](#).

6.1 Additional Information for a Federal Role Request

On the federal role request form, which is launched when you request a role, you need to provide your supervisor's name and email address. They will be notified when you make your role request. Your supervisor does not need to have an account in SAM.gov. While your supervisor may have an administrative role for approval of your requests, being a supervisor alone does not give them approval authority in the system. That lies with the appointed domain Administrator in SAM.gov.

You then select the organization, role, and domain for the request. These fields refer to the role you are requesting, and may differ from the organization in your profile. For example, your profile may be associated with a department such as the General Services Administration (GSA), but you may select a role to perform duties at a GSA sub-tier or office level.



PROFILE

Request Role

Note: All fields are required.

Your Supervisor

Provide contact information for your direct supervisor in case your role administrator needs to verify details.

Note: Your supervisor does not need an account at this site.

Supervisor Name *Required*

Supervisor Email *Required*

Request Details

Organization *Required*

The organization for your role request may be different from the organization where you work.

more

Enter Code or Name

Tips to find your Office:

Enter office codes or keywords in the search field to select the lowest level organization where you work.

- Office Name
- CGAC
- AAC
- Agency Code

Role *Required*

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

more

Select a Role

Domain *Required*

You may select more than one domain, if appropriate.

Select a Domain

Additional Details *Required*

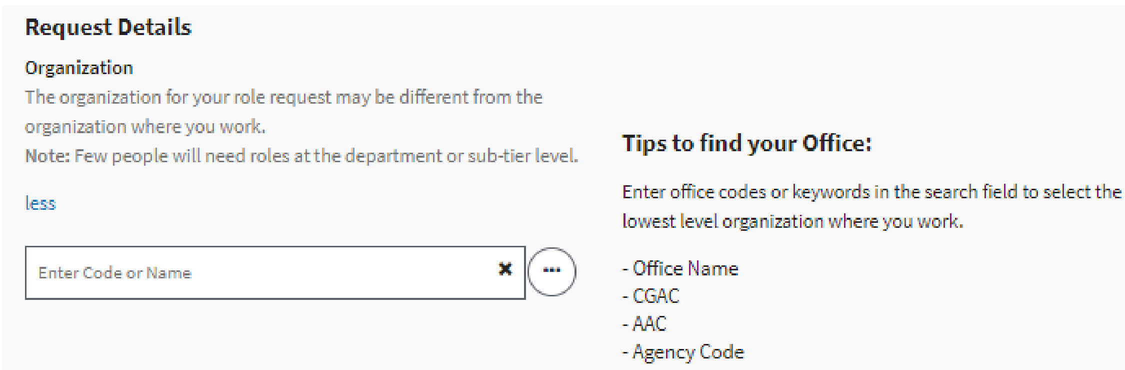
Provide additional details about your position and why you need the requested role to help your administrator make the appropriate

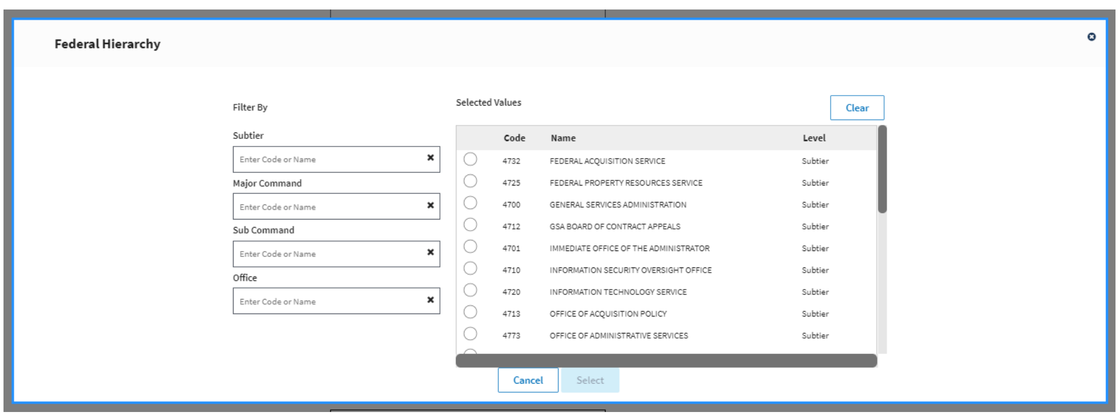
more

Cancel Submit

6.1.1 Selecting an Organization

When selecting the federal organization for your role, you use an organization picker. The button with the ellipsis (three dots) next to the Organization field takes you to an advanced picker that shows you a list of available sub-tiers and offices in your department or independent agency. Start typing a name or code to locate your sub-tier or office. The system will return options that match your entry. Once you have selected where you need the role, select “Submit” for it to appear in your role request.

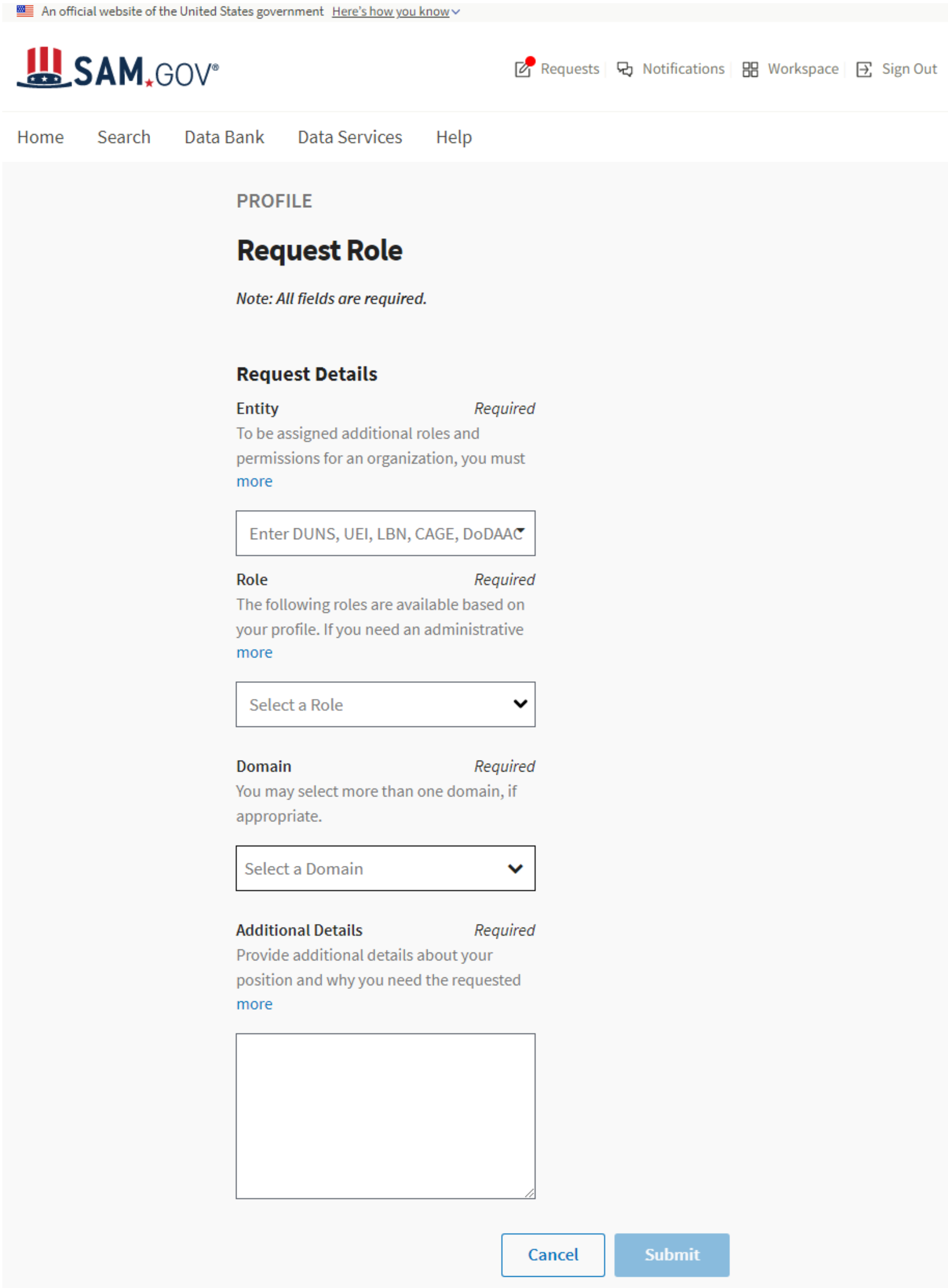




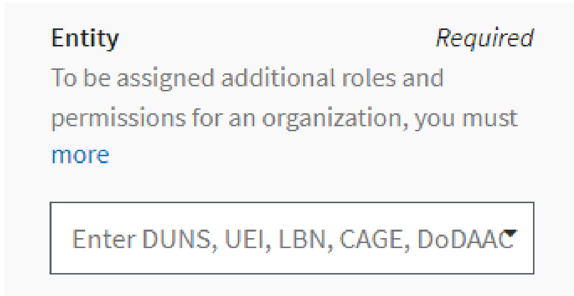
Some roles require you to set the organization to the office level. An Administrator reviewing your role request can edit the organization if needed.

6.2 Additional Information for a Non-Federal Role Request

To make a role request using the non-federal role request page, select the entity, role, and domain you would like the role for. These fields refer to the role you are requesting and may differ from the entity you associated with when you set up your profile. For example, you may have associated yourself with Octo Consulting Group, Inc. when you completed your profile, but you may be selecting a role to perform duties at IBM.



Select the entity by entering an entity ID in the Entity field. The system will return options that match your entry. You will only see public entities in the list. (A public entity is one that has opted for its registration to be visible publicly.) If you need a role with a non-public entity, contact the Administrator for the entity outside of SAM.gov for a role invitation or assignment.

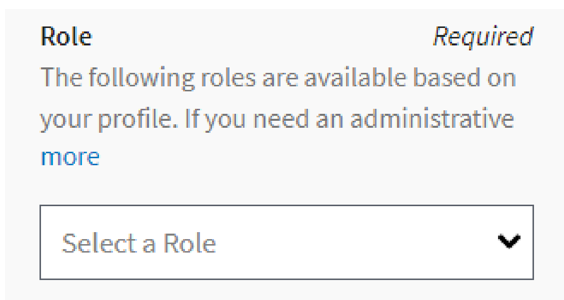


6.3 Further Elements of a Role Request

As you enter the role and domain, SAM.gov will check for role conflicts. You can have only one role per domain. If the system finds an error or a conflict in roles, you will see red next to the relevant fields and an alert on the page. You must remove or edit the conflicting roles to proceed. Once the issue is resolved, the “Submit” button will be enabled.

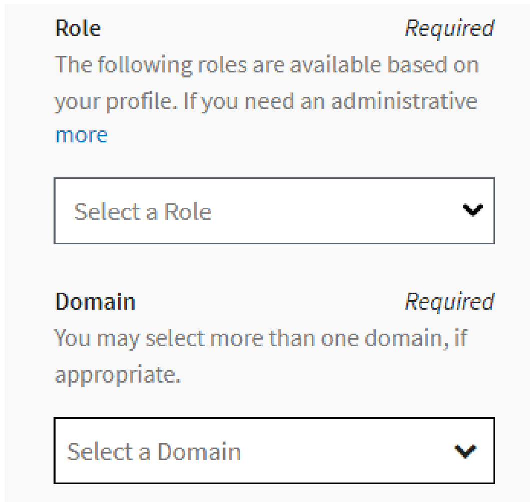
6.3.1 Selecting a Role

Select the dropdown to see all available roles, or start typing a role name into the field for the system to return options that match your entry.



6.3.2 Selecting a Domain

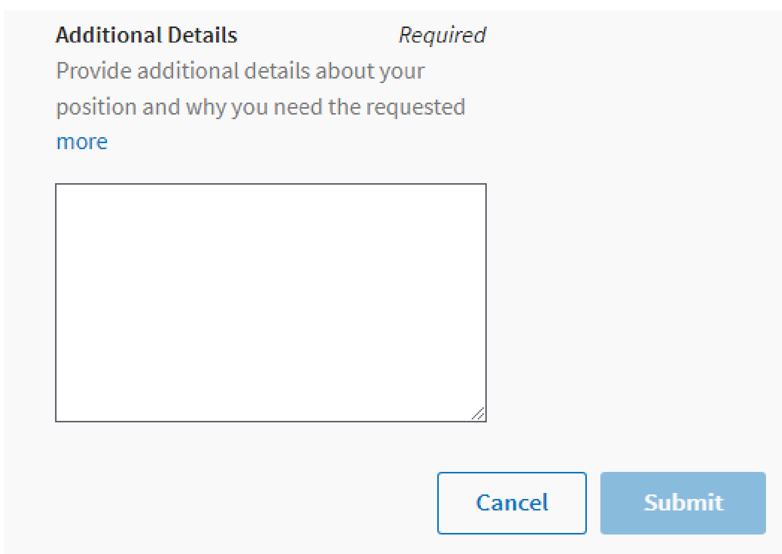
The domain selection is tied to the selection of a role. Once the role is selected, only the domains for that role will be available in the dropdown. You can select more than one domain.



If you change the role field, you need to select the domain again.

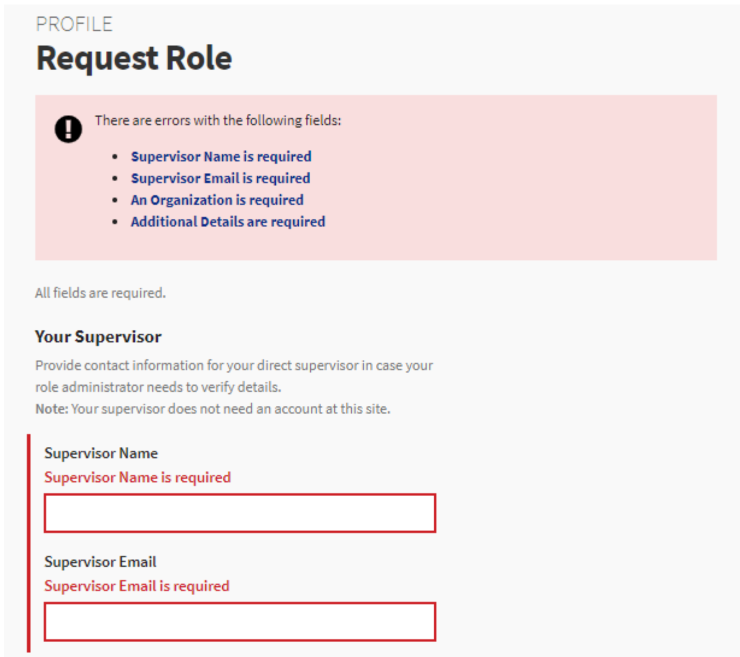
6.3.3 Providing Additional Details

Enter the business need for your role and any helpful details for the Administrator who will review your request.



6.3.4 Submitting the Request

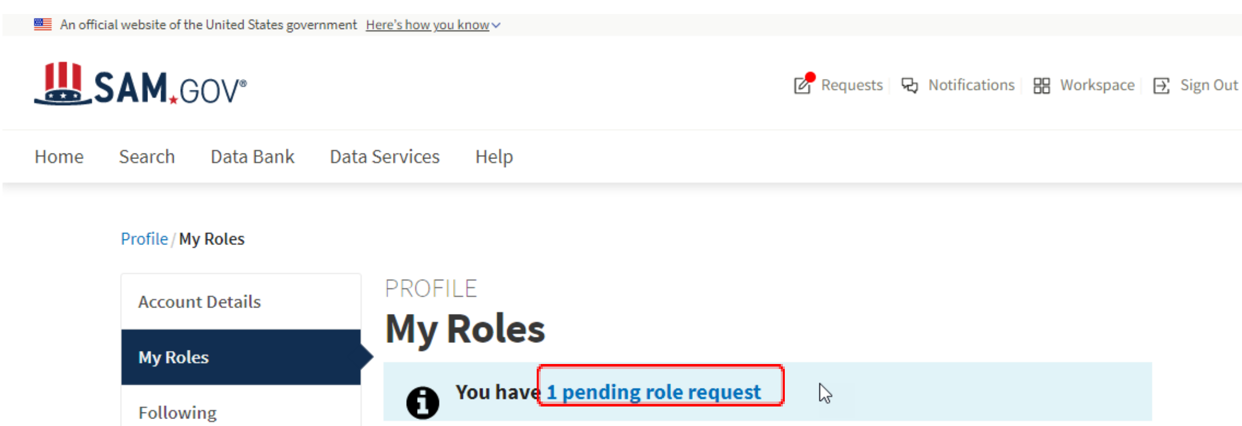
Once all the information is provided, select “Submit” to send your request to the appropriate Administrator for review. If you select “Submit” before completing all fields, you will be provided with a list of the fields that need to be completed to continue.



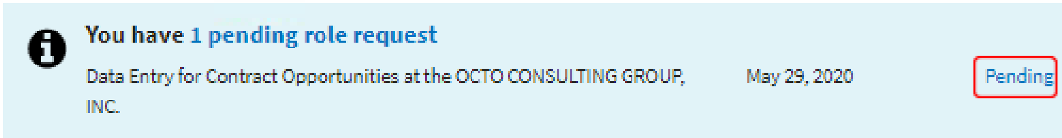
When the Administrator gets the role request, they will be able to review the comments. The Administrator can accept, reject, or edit the role based on the comments.

6.4 Reviewing a Submitted Role Request

You will receive a pending role request notice by email, and a banner will appear on your ”My Roles” page in your Profile.



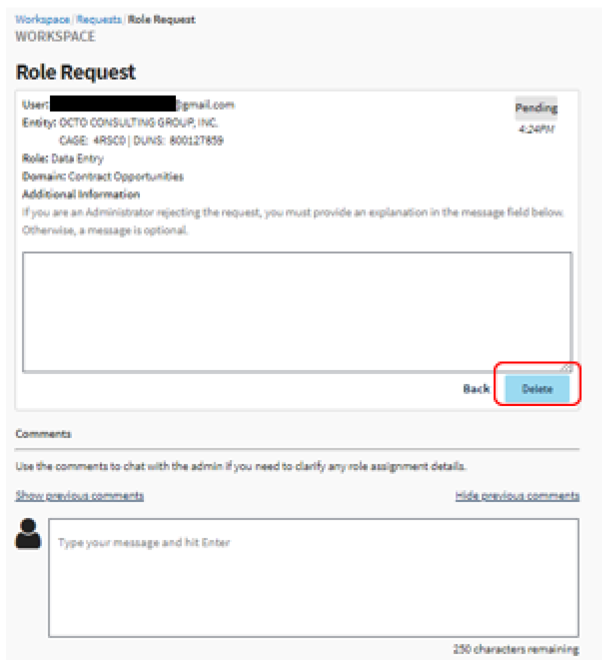
Select the word "Pending" to see an expanded view of your role request.



When signed in, you can also select "Requests" from the header of any page to see all open requests. There are filters to help find a specific request. Select any request for more information.

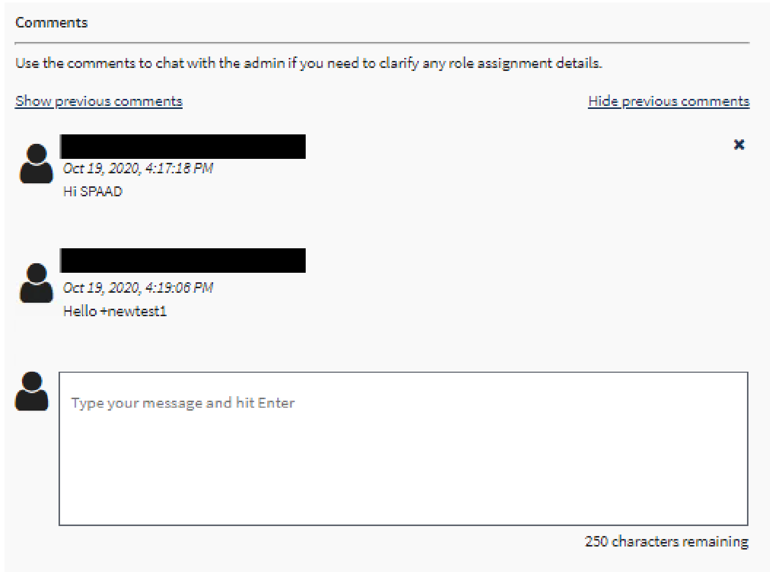
6.5 Canceling a Submitted Role Request

If you need to cancel a role request to change details of the request, you can go to the expanded view of the request from the My Roles page or the Requests page. From this view, you can select "Delete" to cancel the role request.



6.6 Providing Comments on a Role Request

When a pending role request is open, you and the Administrator can exchange comments in real time. This can be useful if you have questions related to the request, or if the Administrator needs to edit the request before approving or rejecting.

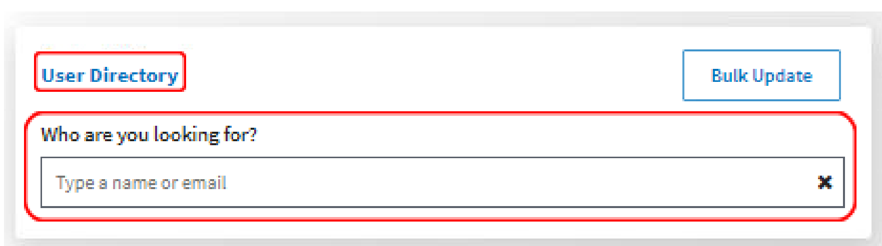


This comments area is only open when the request is pending, and will close once it is approved or rejected.

7. Federal Role Assignment

If you are a federal user with a role that includes "Administrator," you can assign users new or additional roles, invite users to accept roles, manage user permissions, and remove roles. This section explains assigning roles and inviting users to accept roles. The process is the same; the distinction is that a role invitation requires the user to accept the role before the role is finalized. Some federal roles require signing Terms of Use (TOU) prior to accepting the role.

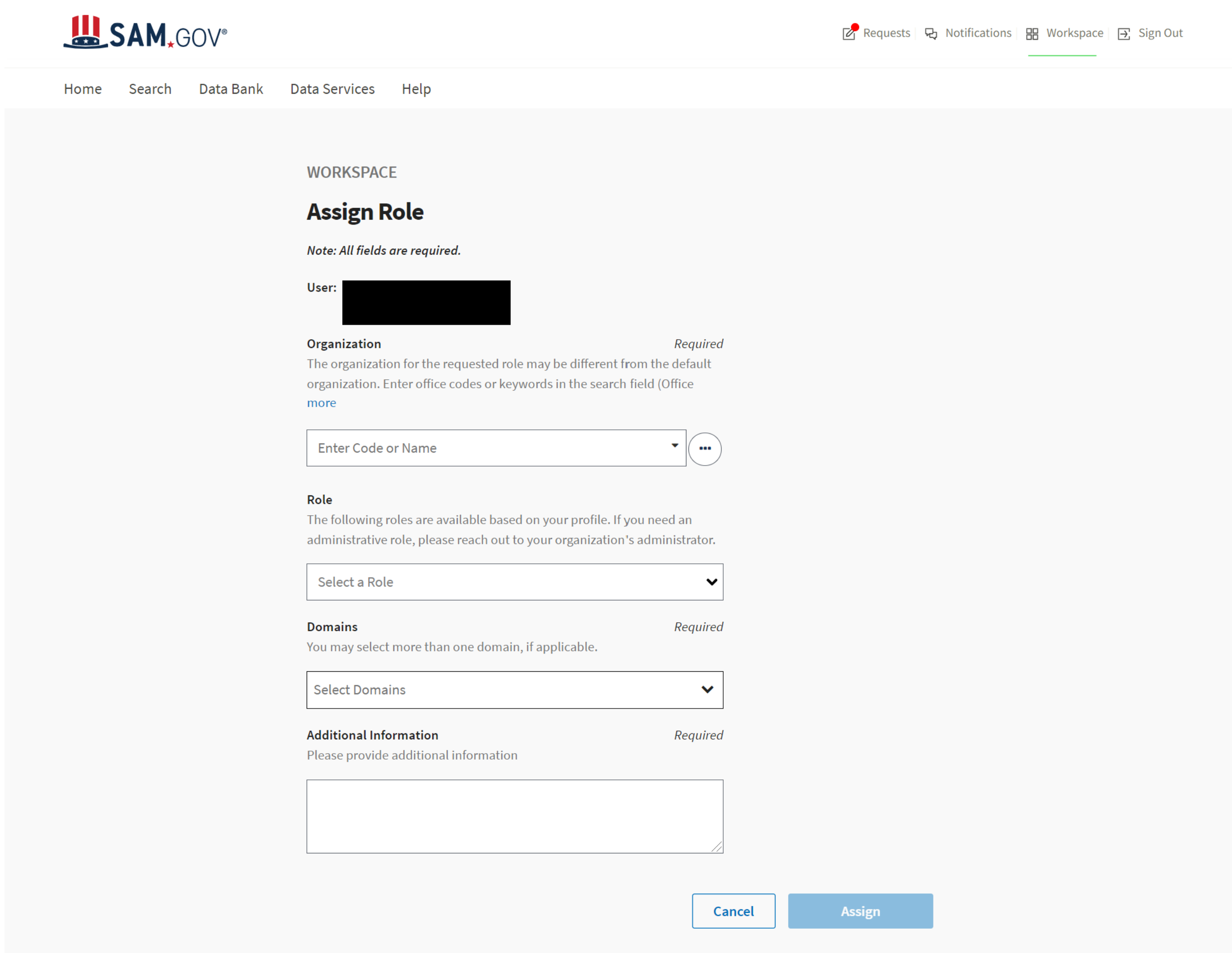
To begin the process of assigning a role to a user, go to the User Directory widget in your Workspace.



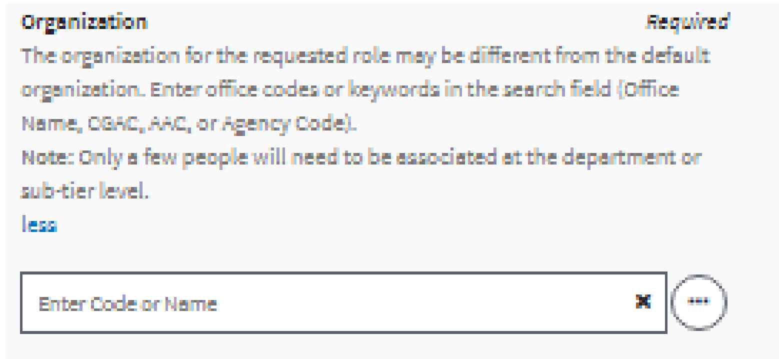
After locating the user in the User Directory, select "Assign Role" from the "Actions" dropdown.

Once you select "Assign Role," you will navigate to the Assign Role page. Here, as was the case with the role request, you will provide information to assign a user a role. Provide the organization for which the user will be performing duties. This does not need to correspond to the organization where the user works.

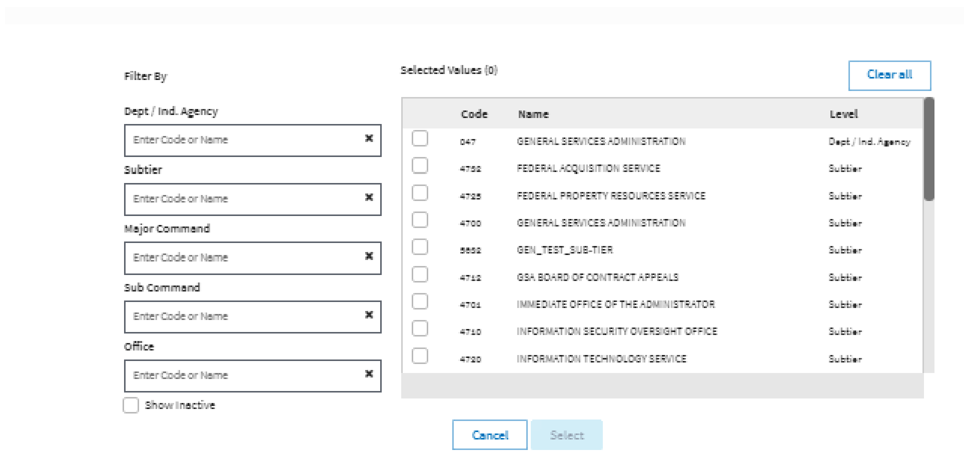
Select the role, then select the domain(s).



For the organization, start typing in the field using an office code or keyword. The system will return options that match your entry. Select the option you want.

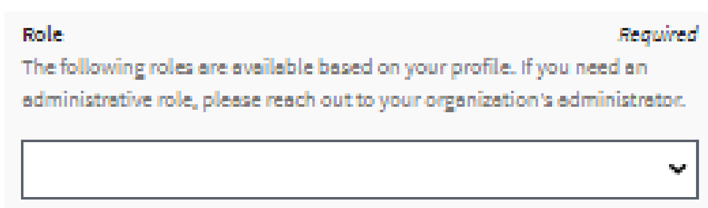


Alternatively, you can select the button with the ellipsis (three dots) to open the advanced picker.

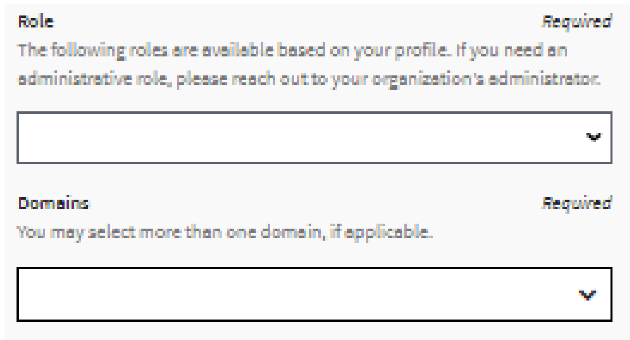


The advanced picker allows you to select a department or independent agency, sub-tier, major command, or sub command to show all organizations at and below the organization you select. Note that you can only assign roles for organizations for which you are an Administrator.

All available roles can be found in the Role dropdown.



The domain selection depends on the role chosen. Once you select a role, available domains will appear in the Domains dropdown.

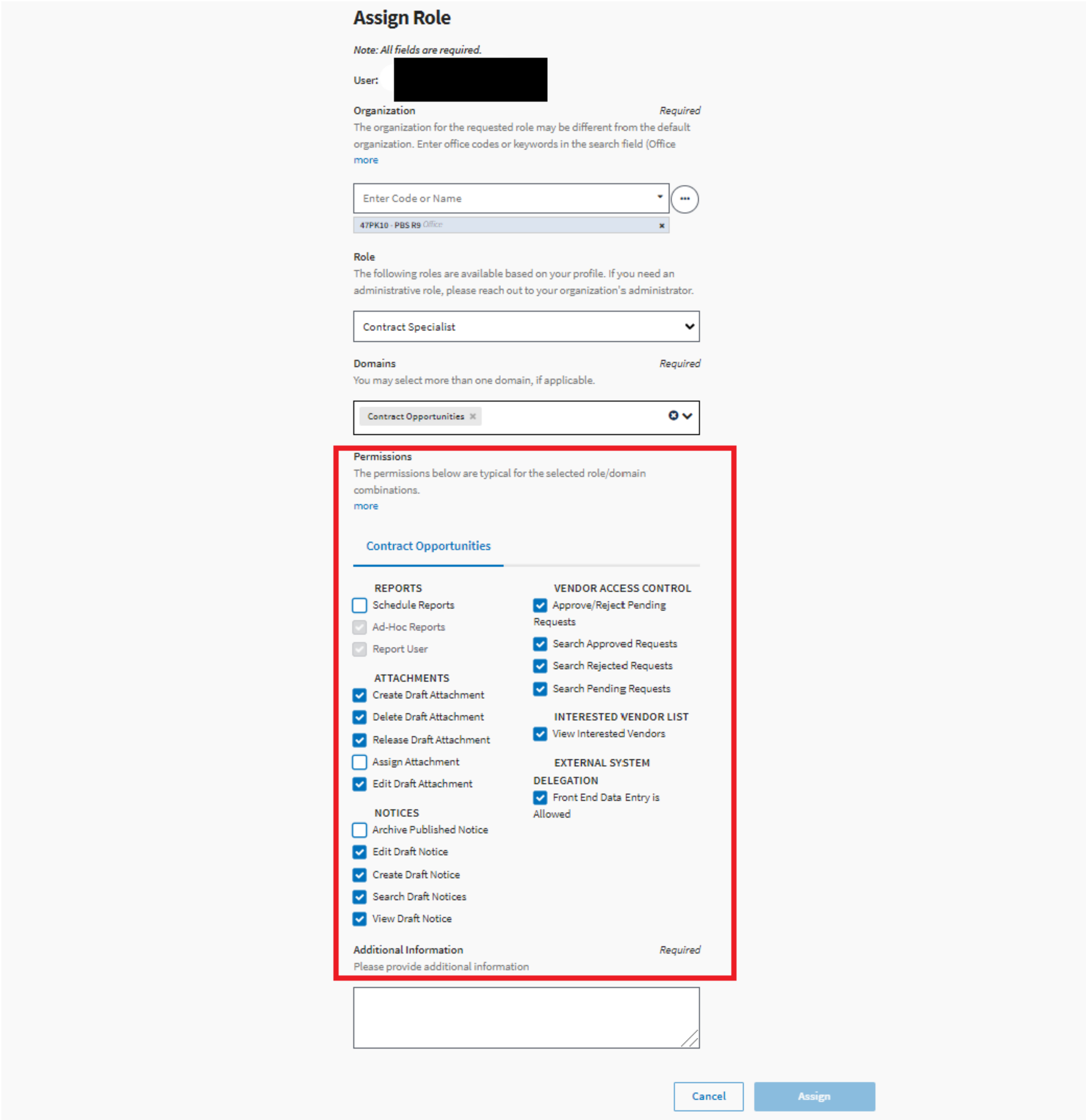


As part of the role assignment process, you will select permissions based on the role and domain(s) you chose. Permissions allow specific data access or functions based on the business need.

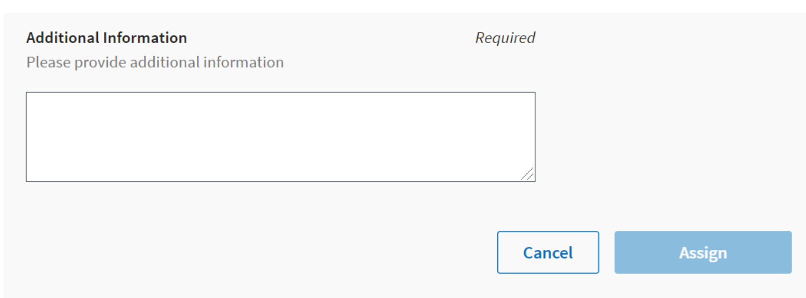
As noted in Section 4, permissions can be:

- Inherent. The permission is always enabled for the role and cannot be disabled.
    - This is indicated by a grey checked box that can't be deselected.
- Removable. The permission is enabled by default, and can be disabled by an administrator on assignment (or at a later time).
    - This is indicated by a blue checked box that can be deselected.
- Addable. The permission is disabled by default, and can be enabled by an administrator on assignment (or at a later time).
    - This is indicated by an unchecked blue box that can be selected.

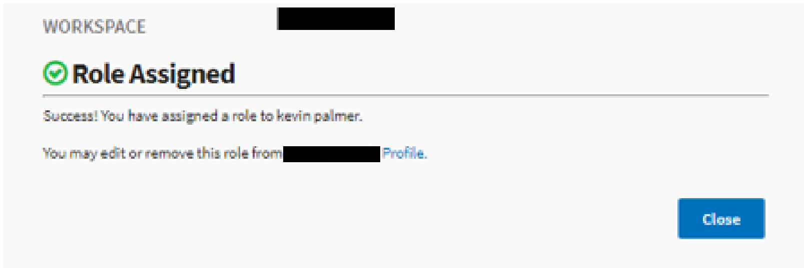
Select the permissions you want the user to have and deselect all others. Some permissions such as viewing the TIN on the entity display page, will require the user getting the role to complete the Terms of Use agreement. All you as the administrator needs to do is select the permissions needed, and SAM will check if a TOU is needed or not.



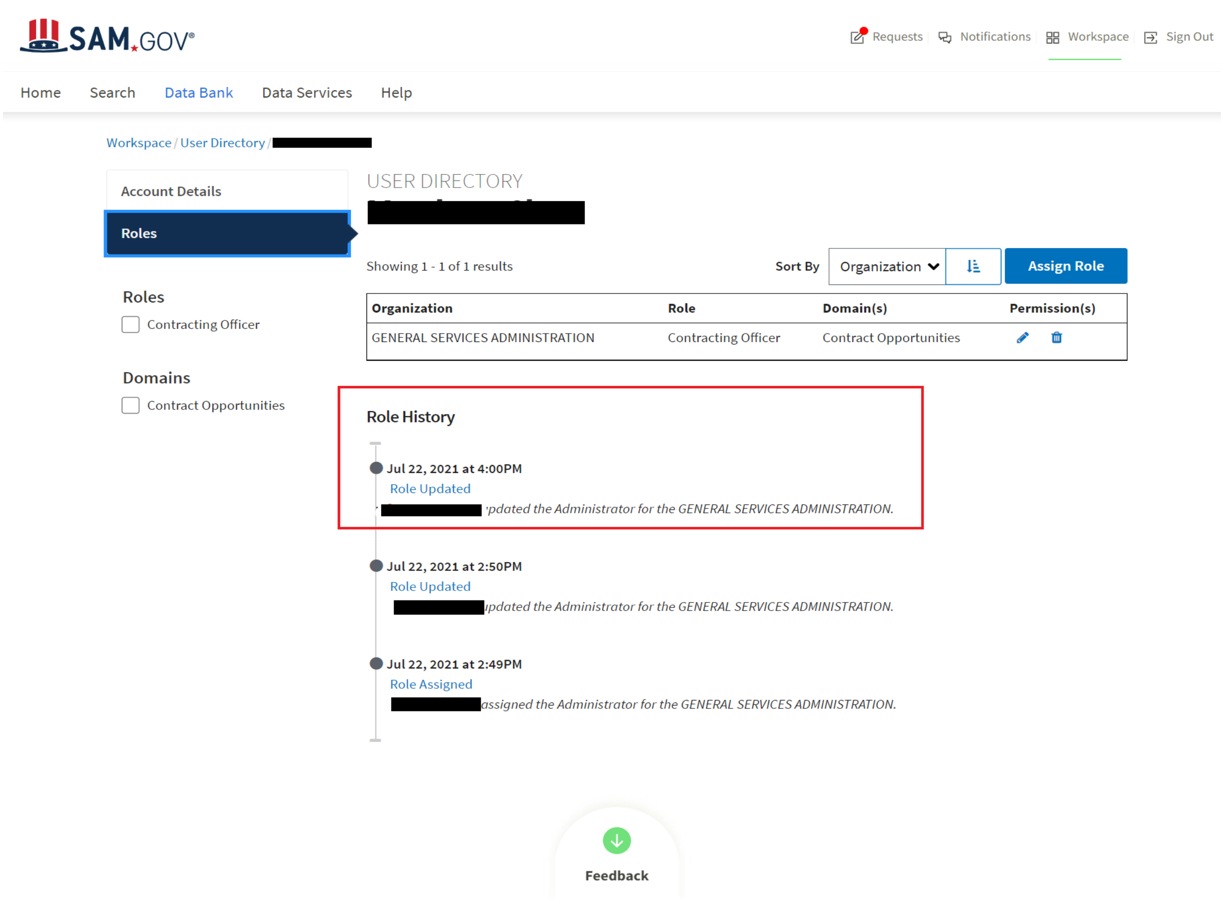
Provide any additional details that you want the user to see.



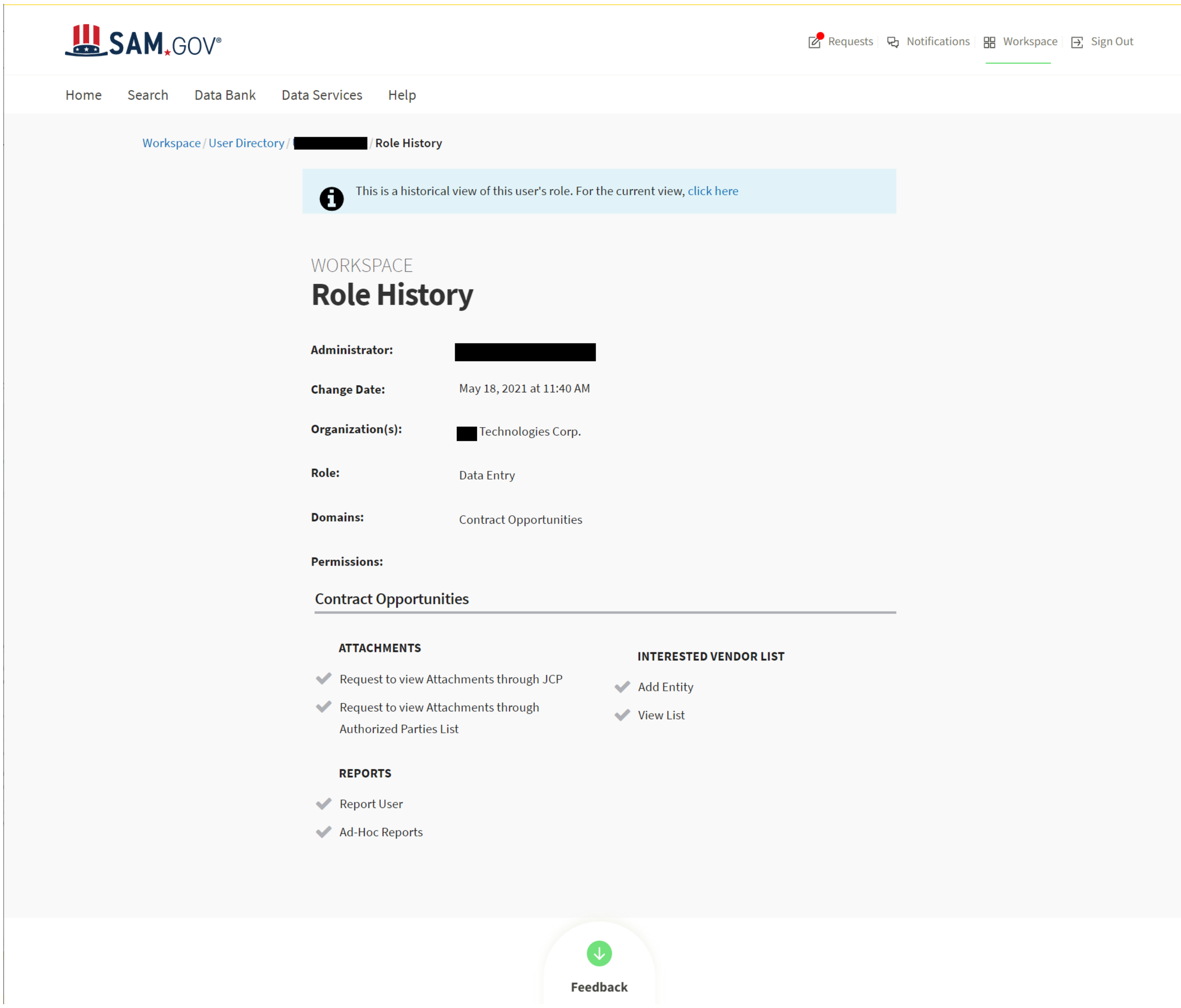
Once all the information is provided, select “Done” to complete the role assignment. All fields must be filled out before “Done” will be enabled. You will then see a confirmation page.



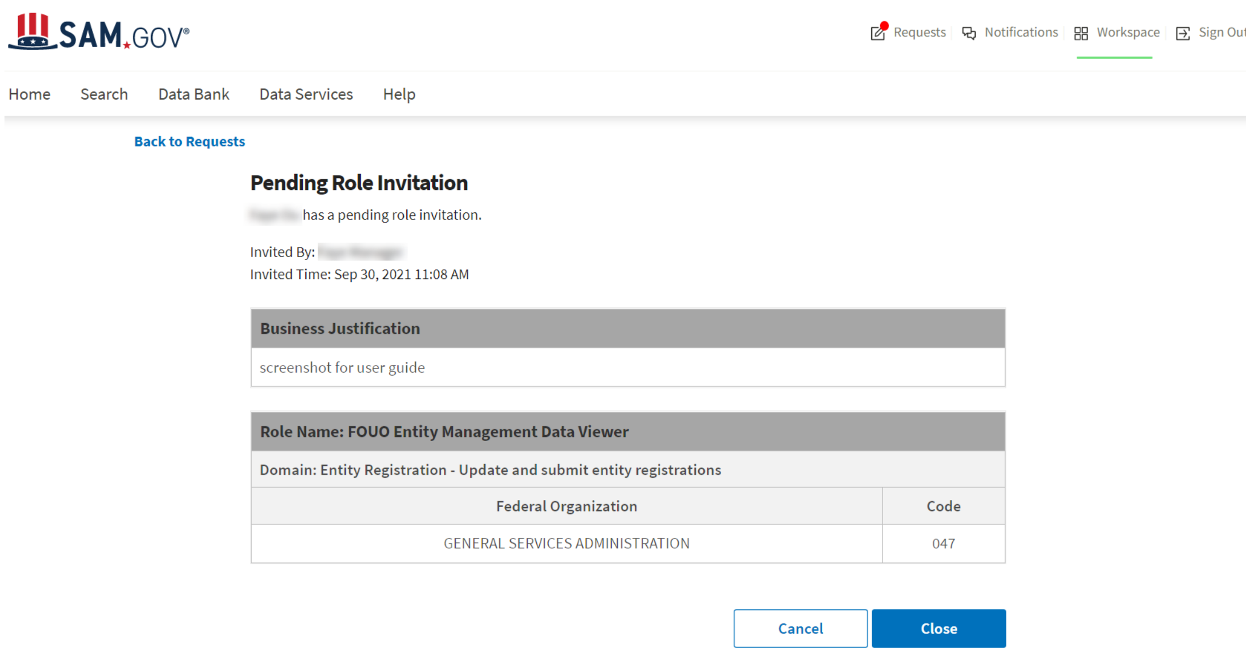
When you close the message, you will return to the user’s Roles tab.



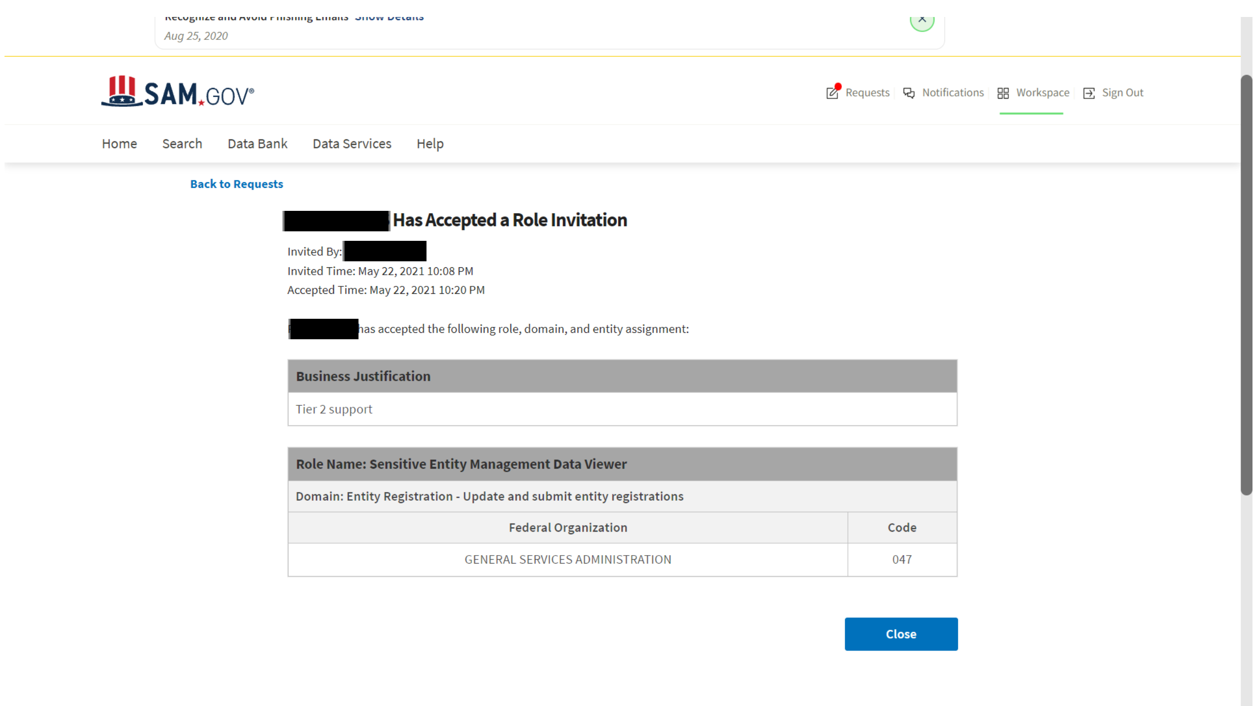
You can use the links in the user’s role history to see an expanded view of the actions taken. A role assignment expanded view appears below.



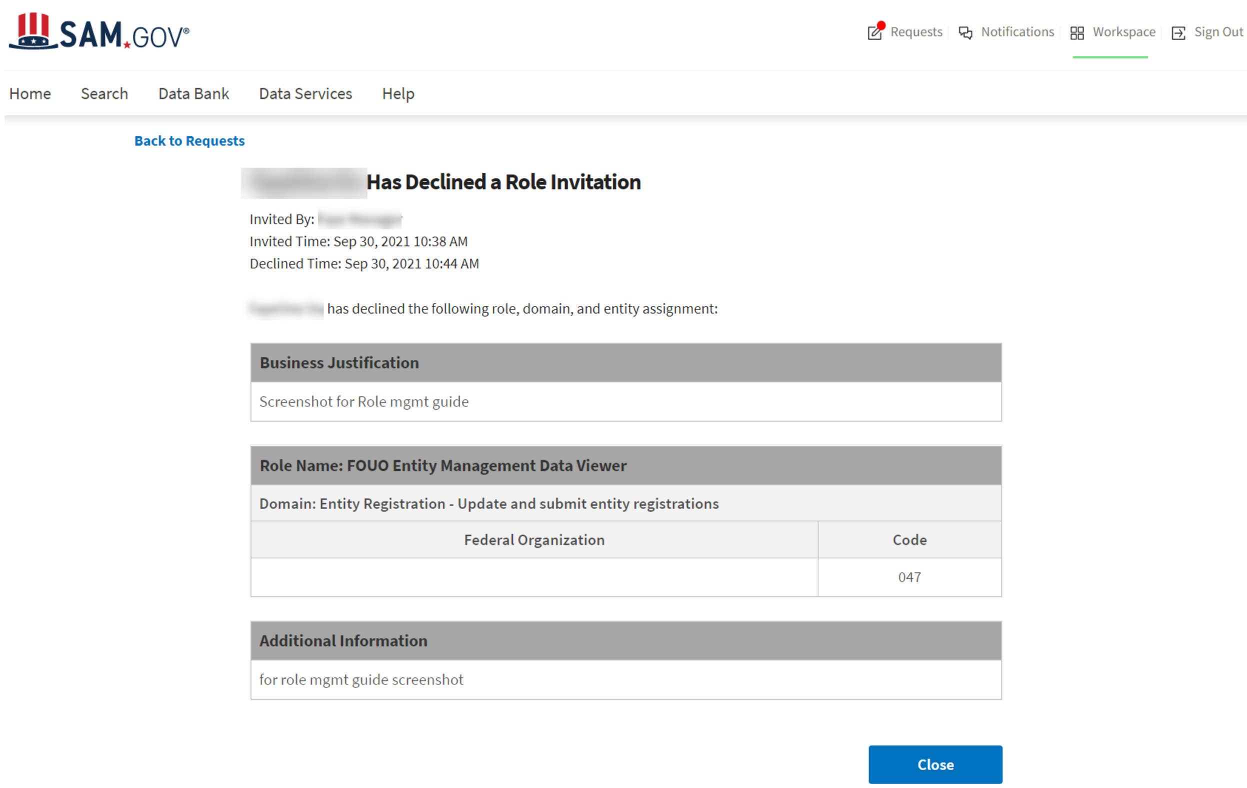
You can review pending role invitations from your Requests page. Opening an invitation will display its details, as shown below. Closing it returns you to your Requests page.



If the user accepts the invitation, you will see the acceptance when viewing the invitation.

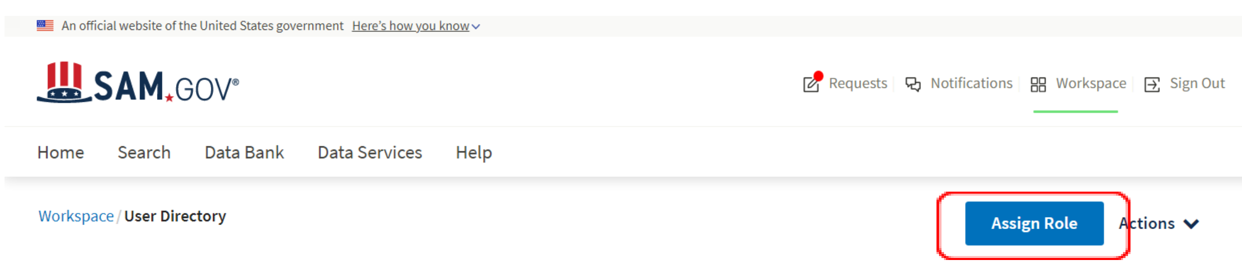


If the user declines, you will see the following in the detailed view.

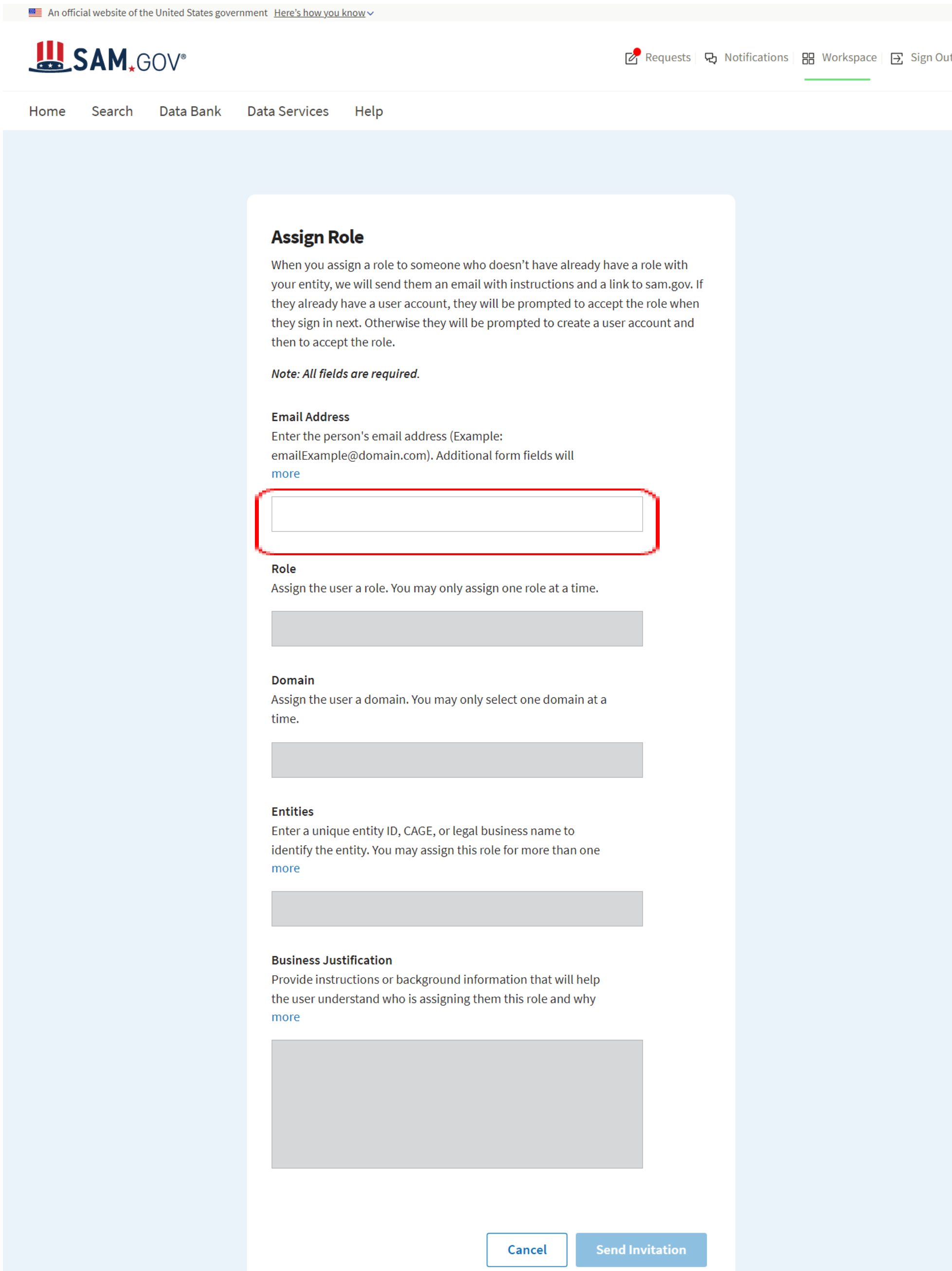


8. Non-Federal Role Invitations

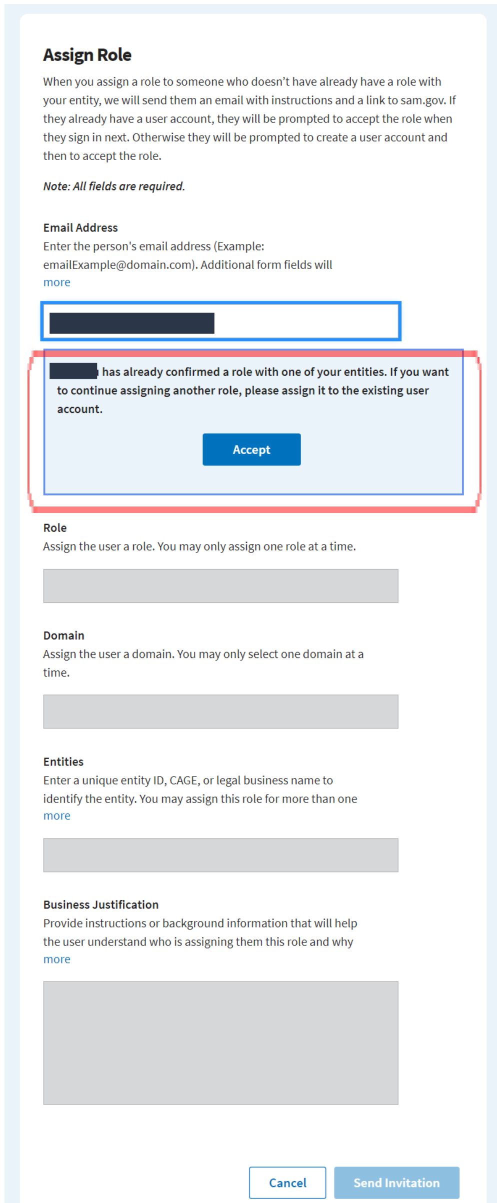
As a non-federal Entity Administrator, you can invite a non-federal user to a role. Navigate to your Workspace, then select “User Directory” to open the User Directory. Locate the “Assign Role” button at the top of the page.



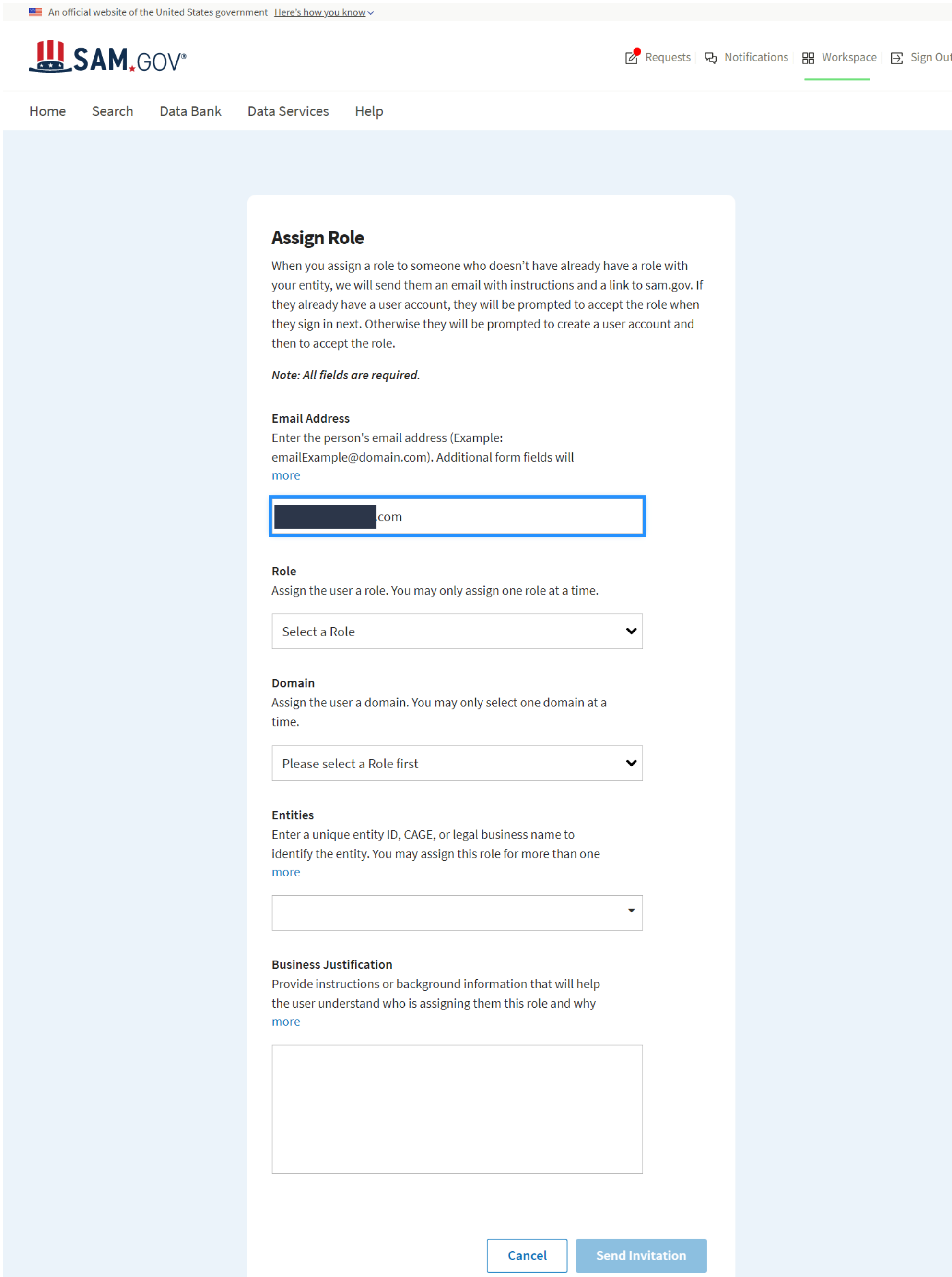
Select the “Assign Role” button to open the page below and begin the process.



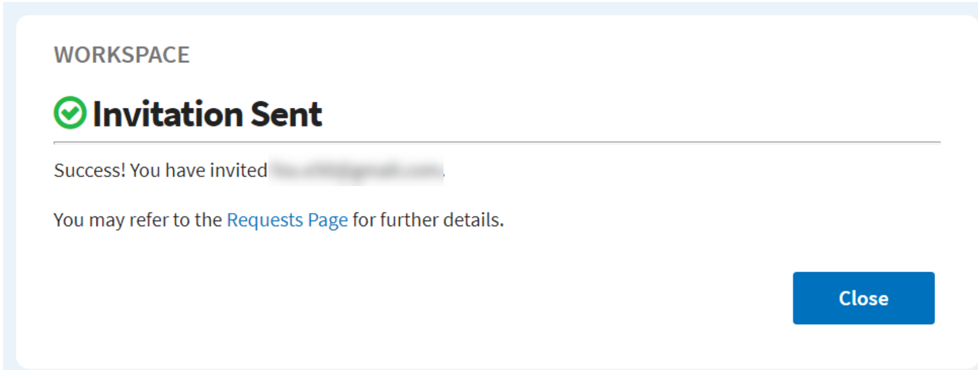
Initially, only the Email Address field is available to you. Once you enter the email address, the system will check to see if that email address belongs to an existing user in SAM.gov who already has a role. If the user does not have a SAM.gov account, you can complete the role invitation, and they will receive a notification that they need to create their account to accept the role. If the user has a SAM.gov account, you can complete the role invitation, and they will receive a notification and, when they next sign in, they will receive a prompt to review the invitation. If the user is signed up in SAM.gov, and they have already allowed you to grant them roles, then you will see the alert below.



After you select “Accept,” or if you do not see the alert, you will be on the Assign Role page with the user’s email address filled in and other fields enabled for data entry. There, you can select the role, domain(s), and entity(ies) for the role you want to assign. Select the role and domain using the dropdowns or by typing in the boxes and choosing from the available results. Select the entity by typing an ID number or entity name in the box. The system will return options that match your text and you can select the option you are looking for. The entity does not have to match the entity that the user’s profile is associated with. You can assign a user a role with any entity you manage.


An official website of the United States government Here's how you know
SAM.GOV®
Requests
Notifications
Workspace
Sign Out
Home
Search
Data Bank
Data Services
Help
Assign Role
When you assign a role to someone who doesn't have already have a role with your entity, we will send them an email with instructions and a link to sam.gov. If they already have a user account, they will be prompted to accept the role when they sign in next. Otherwise they will be prompted to create a user account and then to accept the role.
Note: All fields are required.
Email Address
Enter the person's email address (Example: emailExample@domain.com). Additional form fields will
more
[redacted].com
Role
Assign the user a role. You may only assign one role at a time.
Select a Role
Domain
Assign the user a domain. You may only select one domain at a time.
Please select a Role first
Entities
Enter a unique entity ID, CAGE, or legal business name to identify the entity. You may assign this role for more than one
more
Business Justification
Provide instructions or background information that will help the user understand who is assigning them this role and why
more
Cancel
Send Invitation

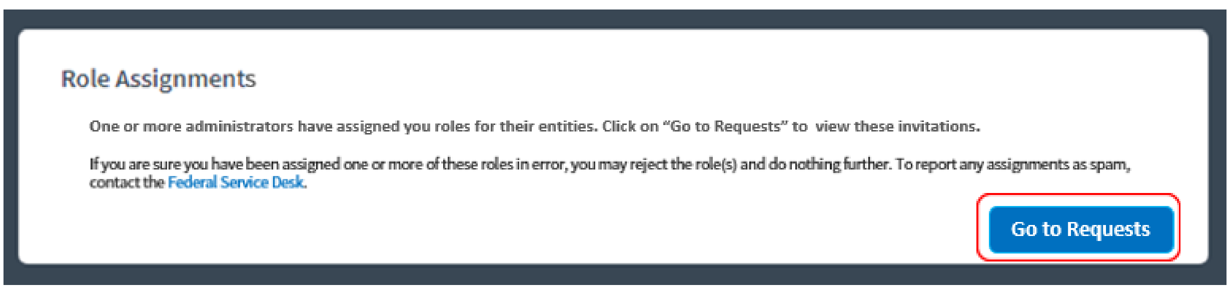
Once you submit the role assignment, you will see the message below.



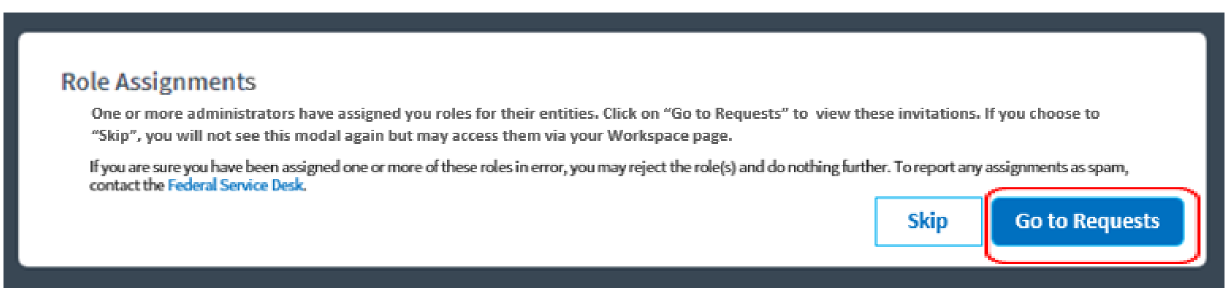
Selecting "Cancel" at any point will return you to the User Directory.

8.1 Reviewing a Non-Federal Role Invitation

When you, as a new or existing SAM.gov user, receive a role invitation notification, you will be provided with a link to either create a SAM.gov account, or log into your account. Once you have created your account (if necessary) and logged in, you will see one of the following alerts. If you are a new user who has just created your account, you will see this alert.

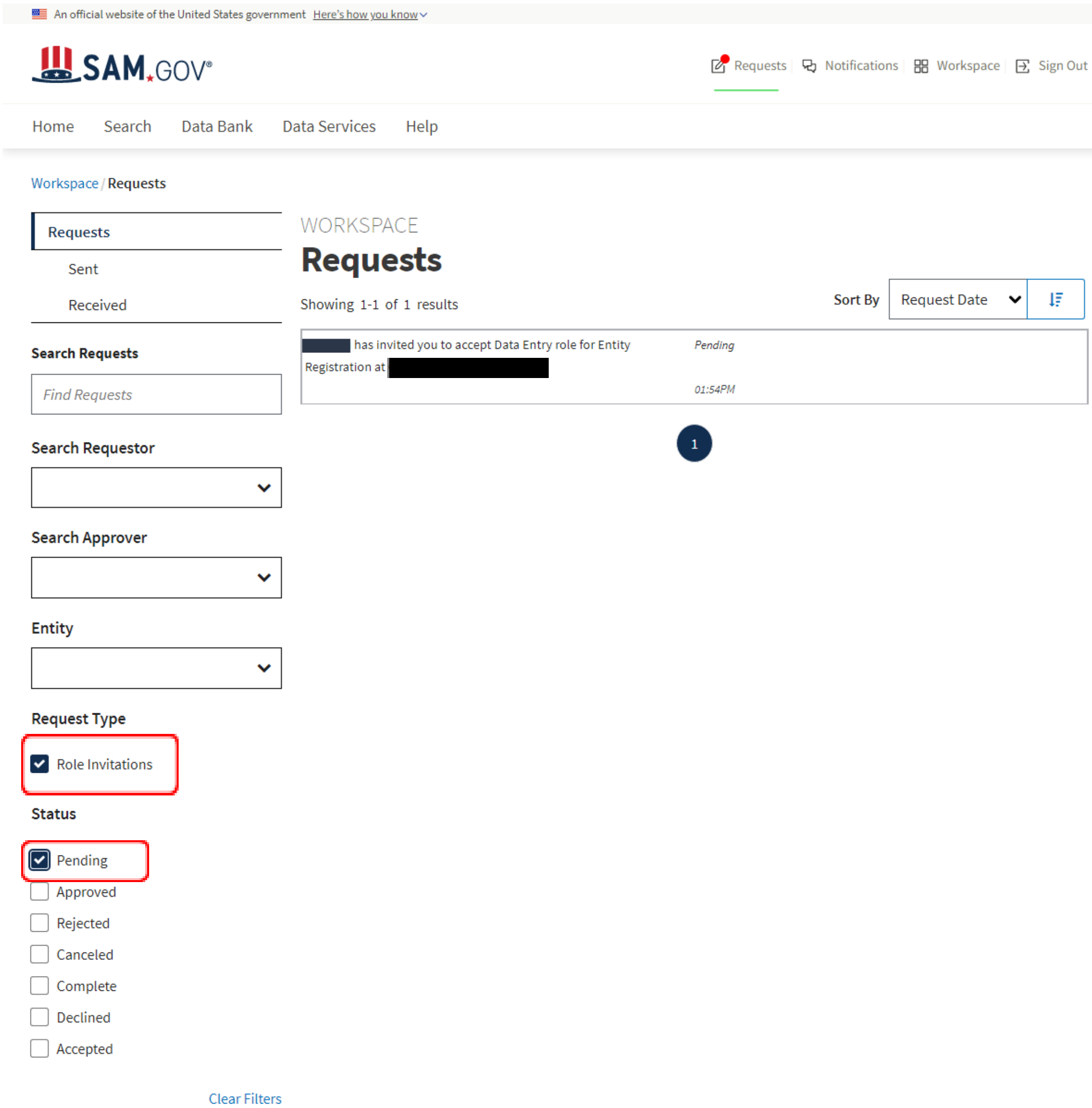


If you are an existing user who is logging in again, you will see this alert.



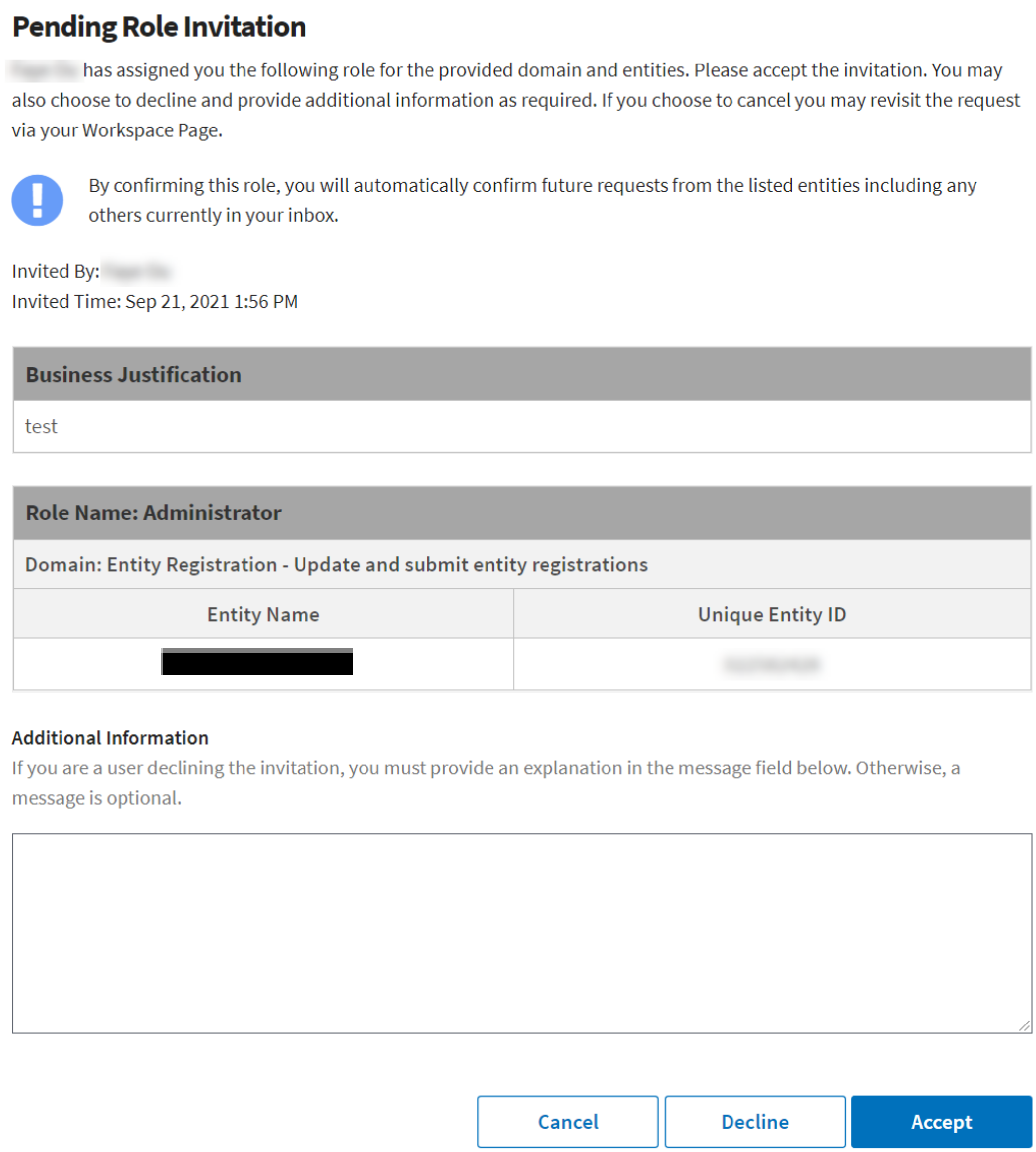
As an existing user, you may choose to skip reviewing the role invitation assignment and review it later from your Workspace or the "Requests" link in the site header. If you select "Skip," you will be directed to your main Workspace page.

In either case, when you select “Go to Requests,” you will be directed to your Workspace Requests page where you will see the invitations you have received. The page will be filtered to only show pending role invitations.



8.2 Responding to a Pending Role Invitation

From the Requests page above, you can open the invitation and accept, decline, or cancel. If you decline the invitation, you must provide a comment in the Additional Information field. You will reject the role and the administrator will be notified. If you choose to cancel, you can revisit the action at a later time.



Pending Role Invitation

has assigned you the following role for the provided domain and entities. Please accept the invitation. You may also choose to decline and provide additional information as required. If you choose to cancel you may revisit the request via your Workspace Page.

By confirming this role, you will automatically confirm future requests from the listed entities including any others currently in your inbox.

Invited By:
Invited Time: Sep 21, 2021 1:56 PM

Business Justification
test

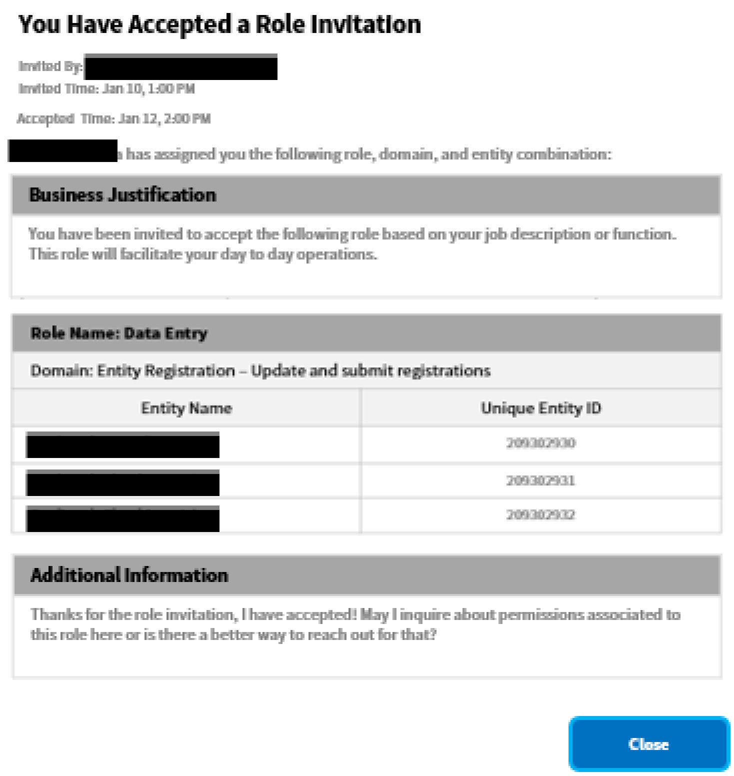
Role Name: Administrator	
Domain: Entity Registration - Update and submit entity registrations	
Entity Name	Unique Entity ID
[redacted]	

Additional Information
If you are a user declining the invitation, you must provide an explanation in the message field below. Otherwise, a message is optional.

Cancel | Decline | Accept

8.3 Accepting an Invitation

When you accept an invitation, you will be directed to a detailed view of the invitation just accepted where you can see the role and business justification, as well as any comments you entered.



You Have Accepted a Role Invitation

Invited By: [redacted]
Invited Time: Jan 10, 1:00 PM

Accepted Time: Jan 12, 2:00 PM

[redacted] has assigned you the following role, domain, and entity combination:

Business Justification

You have been invited to accept the following role based on your job description or function. This role will facilitate your day to day operations.

Role Name: Data Entry

Domain: Entity Registration – Update and submit registrations

Entity Name	Unique Entity ID
[redacted]	209302930
[redacted]	209302931
[redacted]	209302932

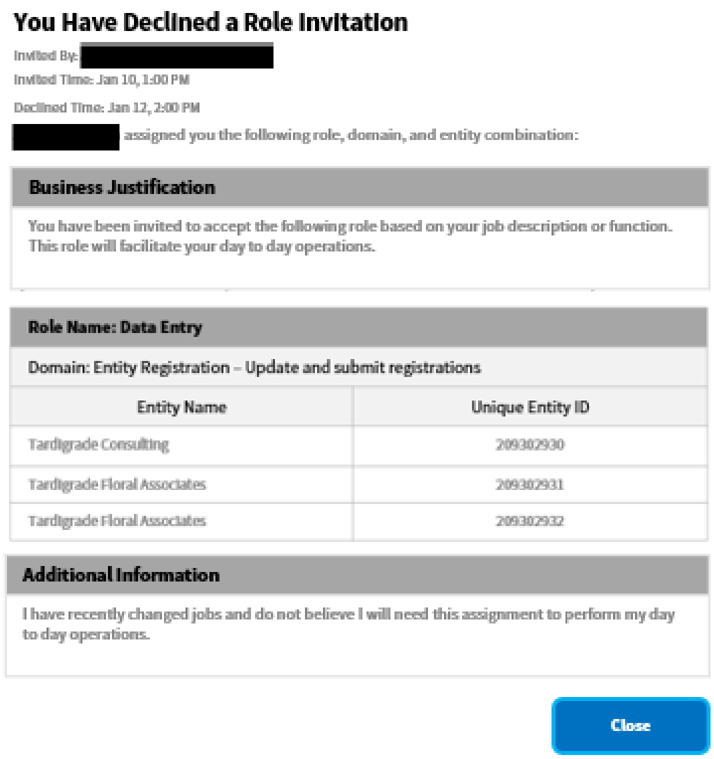
Additional Information

Thanks for the role invitation, I have accepted! May I inquire about permissions associated to this role here or is there a better way to reach out for that?

Close

8.4 Declining an Invitation

If you decline an invitation, you will be directed to a view of the invitation just declined where you can see the role and business justification.



You Have Declined a Role Invitation

Invited By: [redacted]

Invited Time: Jan 10, 1:00 PM

Declined Time: Jan 12, 2:00 PM

[redacted] assigned you the following role, domain, and entity combination:

Business Justification

You have been invited to accept the following role based on your job description or function. This role will facilitate your day to day operations.

Role Name: Data Entry

Domain: Entity Registration – Update and submit registrations

Entity Name	Unique Entity ID
Tardigrade Consulting	209302930
Tardigrade Floral Associates	209302931
Tardigrade Floral Associates	209302932

Additional Information

I have recently changed jobs and do not believe I will need this assignment to perform my day to day operations.

Close

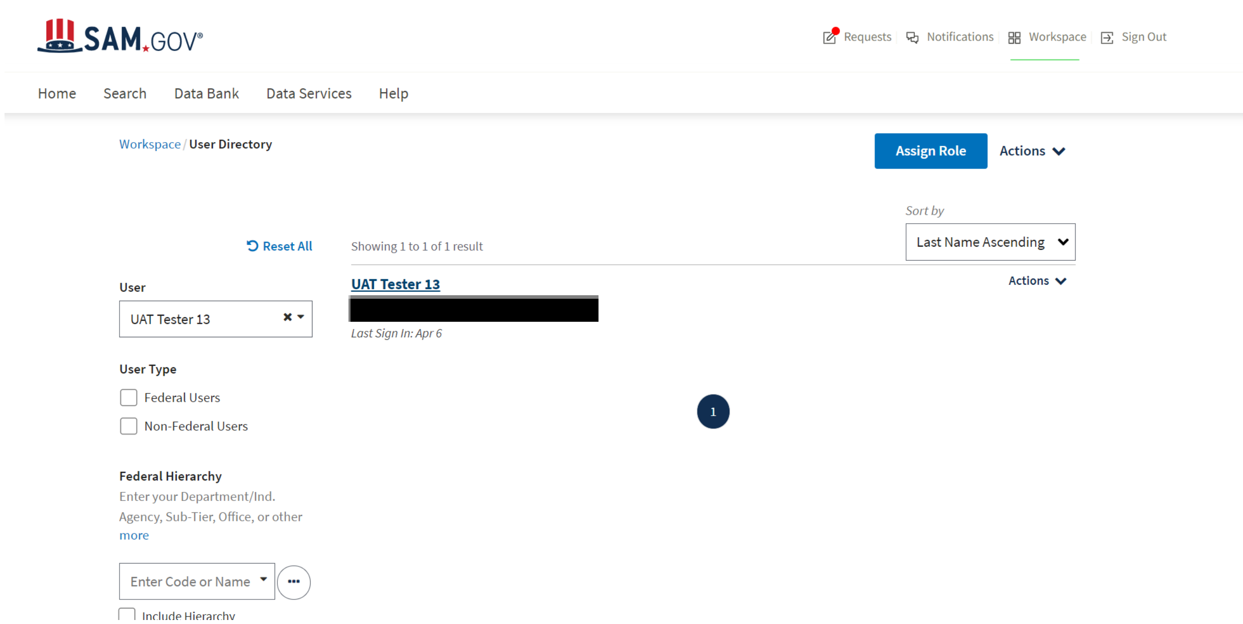
9. Managing Users

As an Administrator, you can update permissions for an existing role, change a role, or remove a role. This section explains how to do these tasks.

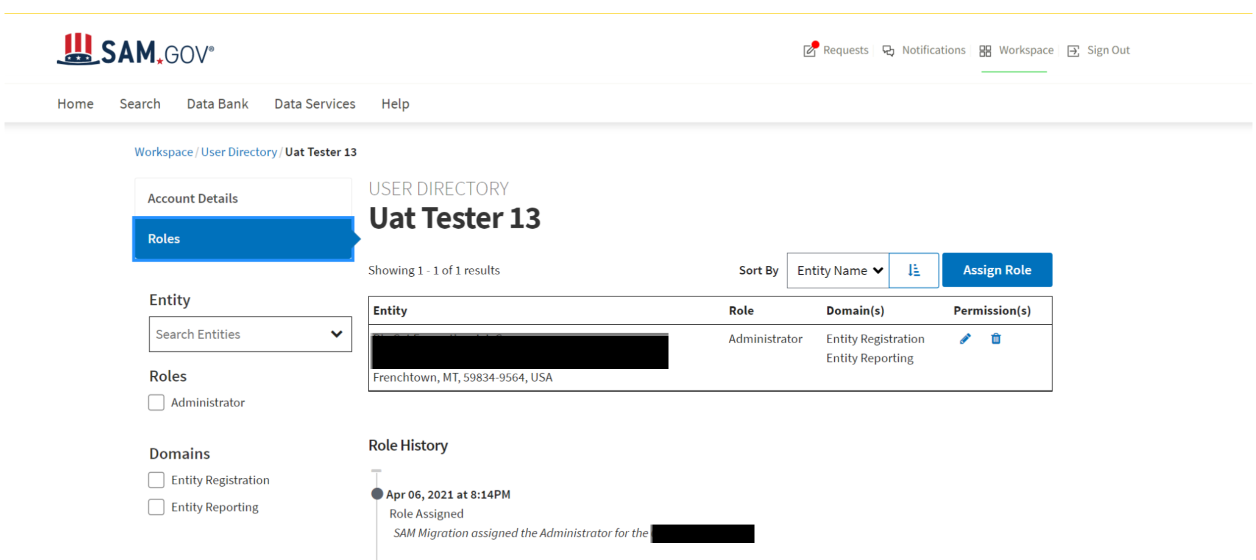
9.1 Changing Permissions

As an Administrator for a domain, you decide if users need their permissions adjusted based on what actions they need to take.

To make changes to permissions, navigate to the User Directory from your Workspace, and find the user you want to update as described in Section 5.



Select the user's name to open their profile. In the profile, select "Roles" to see the role(s) the user has.



To edit the user's role, select the pencil icon under "Permissions" next to the role you want to edit. The pencil icon will launch the Edit Access page. It is similar to the page you see when you assign a role.

Edit Access

Note: All fields are required.

User:

Entity *Required*

Guidehouse Inc.
UEI: [redacted] | CAGE: 1HLR9 | DUNS: [redacted]

Role

The following roles are available based on your profile. If you need an administrative role, please reach out to your organization's administrator.

Viewer

Domains *Required*

You may select more than one domain, if applicable.

Entity Registration

Permissions

The permissions below are typical for the selected role/domain combinations.

more

Entity Registration

ENTITY REGISTRATION

- [x] View Active/Expired Registrations
- [x] View Draft/Work in Progress/Submitted Registration

Additional Information *Required*

Please provide additional information

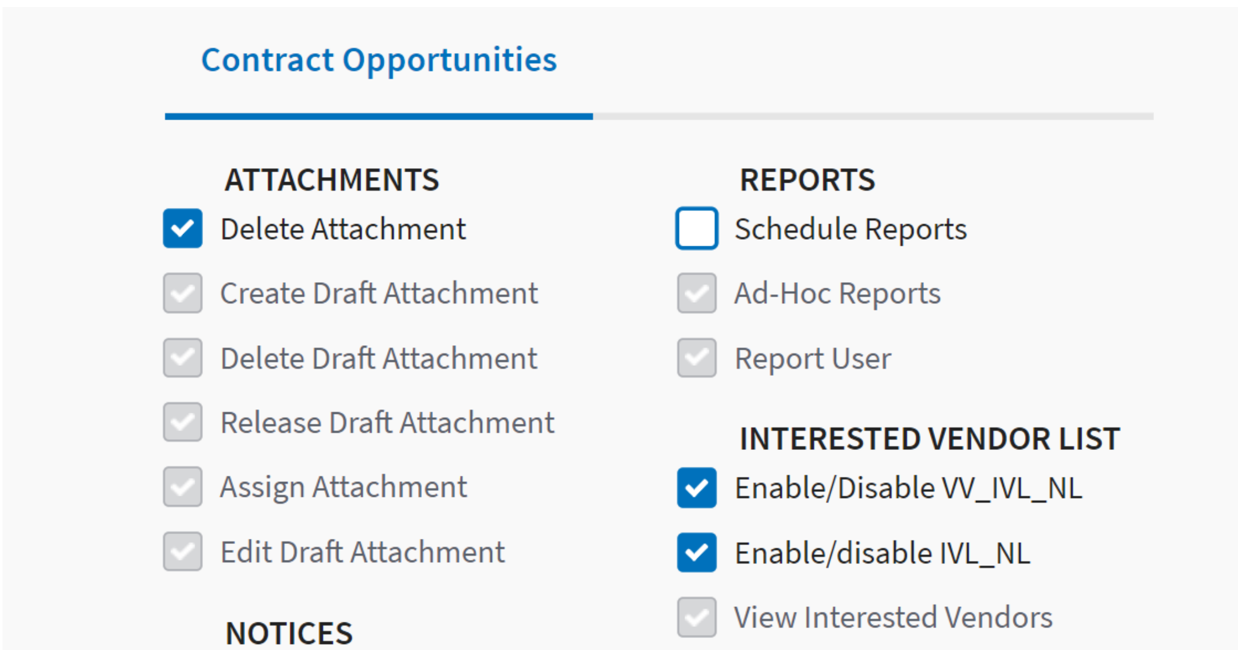
test

Cancel Done

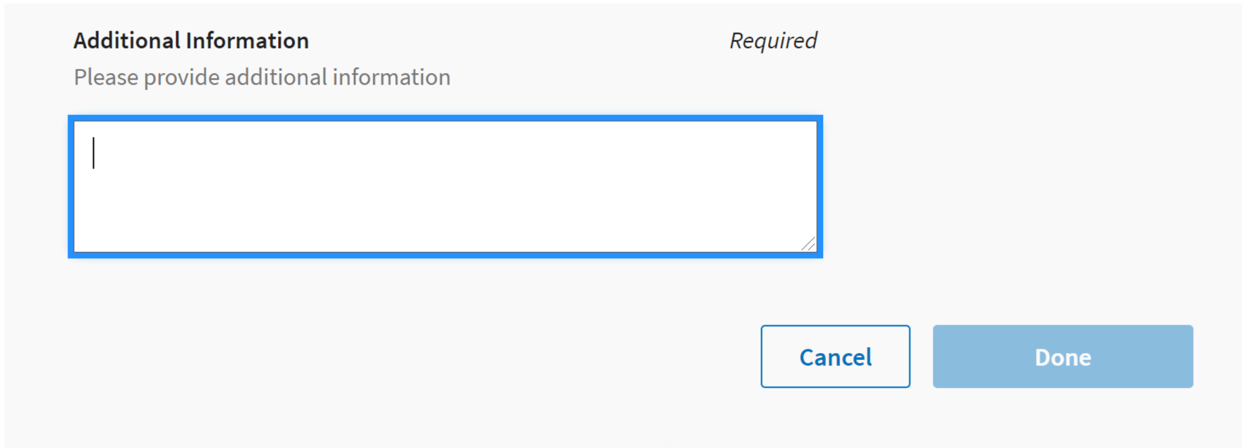
You can edit any aspect of the role, including the organization, role, domain, and permissions.

As noted in Section 4, permissions can be:

- Inherent. The permission is always enabled for the role and cannot be disabled.
  - This is indicated by a grey checked box that can't be deselected.
- Removable. The permission is enabled by default, and can be disabled by an administrator on assignment (or at a later time).
  - This is indicated by a blue checked box that can be deselected.
- Addable. The permission is disabled by default, and can be enabled by an administrator on assignment (or at a later time).
  - This is indicated by an unchecked blue box that can be selected.



All edits to roles require an explanation in the "Additional Information" box. Once that field has been completed, the "Done" button will be enabled.

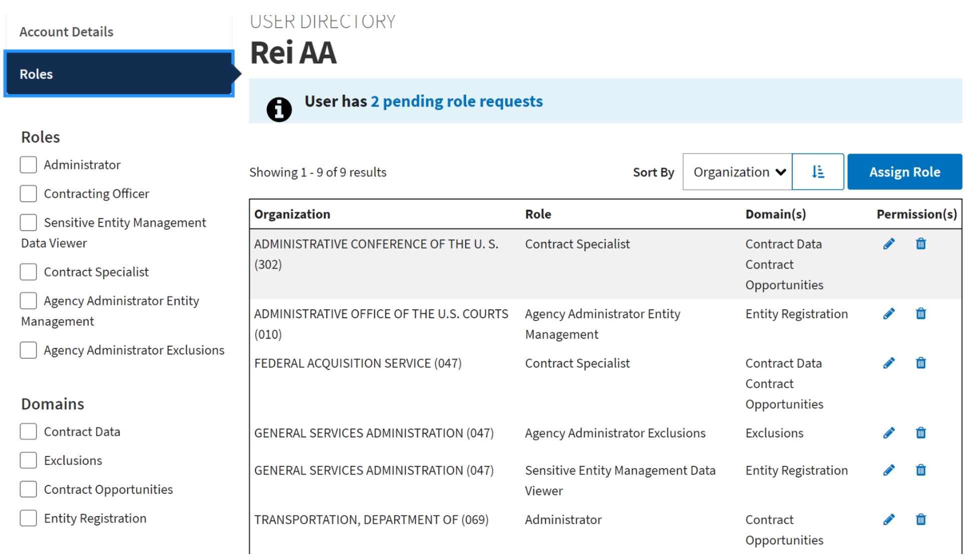


When you select "Done," you will make the changes and be returned to the user's Roles page.

9.2 Removing a Role

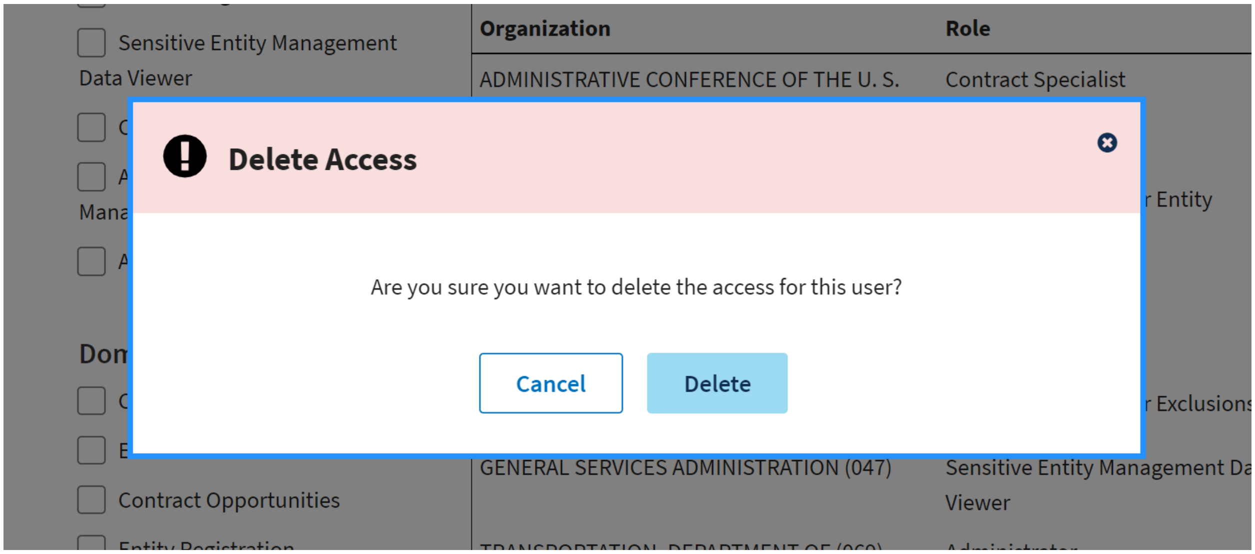
As a domain Administrator, you must remove roles from users who no longer need them.

First, find the user whose role you need to remove in the User Directory as described in Section 5. Select the user's name to open their profile, and select the Roles page.

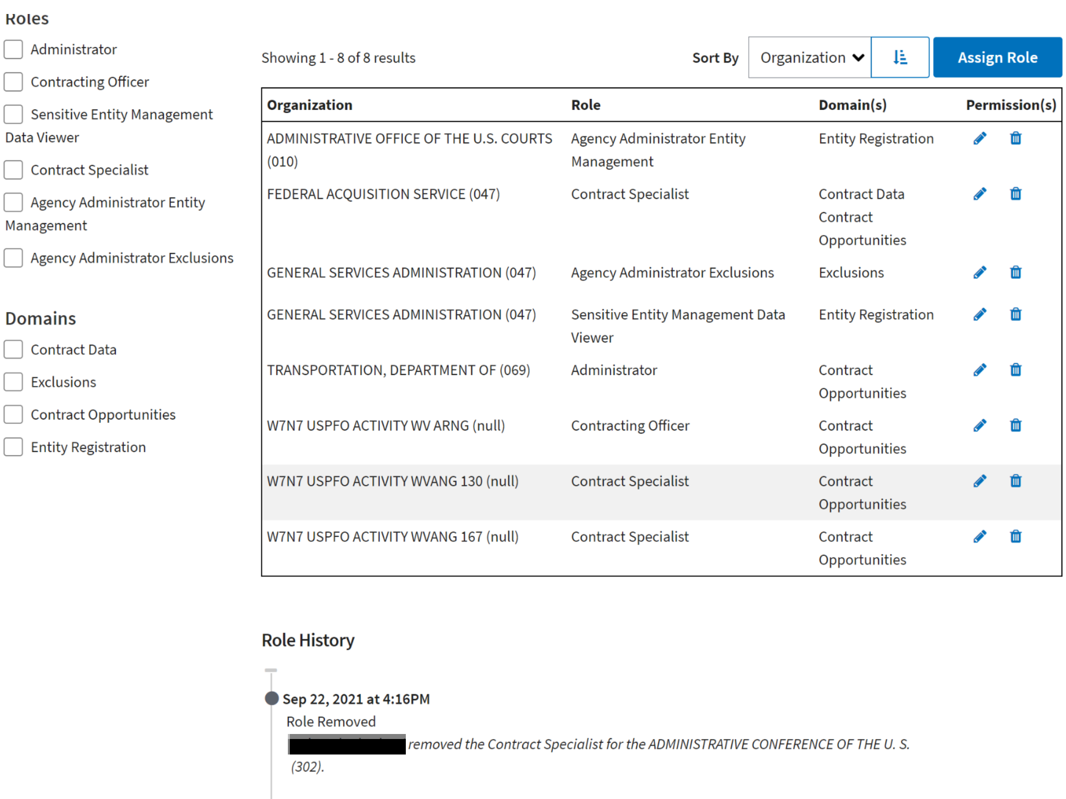


To remove a role, click the trash can icon next to the role in the "Permissions" column.

When the trash can icon is selected, an alert will appear.



Selecting “Delete” will remove the role and return you to the user’s Roles page, where you can confirm that the role was removed. The removal will also be reflected in the Role History at the bottom of the page.



Organization	Role	Domain(s)	Permission(s)
ADMINISTRATIVE OFFICE OF THE U.S. COURTS (010)	Agency Administrator Entity Management	Entity Registration	
FEDERAL ACQUISITION SERVICE (047)	Contract Specialist	Contract Data Contract Opportunities	
GENERAL SERVICES ADMINISTRATION (047)	Agency Administrator Exclusions	Exclusions	
GENERAL SERVICES ADMINISTRATION (047)	Sensitive Entity Management Data Viewer	Entity Registration	
TRANSPORTATION, DEPARTMENT OF (069)	Administrator	Contract Opportunities	
W7N7 USPFO ACTIVITY WV ARNG (null)	Contracting Officer	Contract Opportunities	
W7N7 USPFO ACTIVITY WVANG 130 (null)	Contract Specialist	Contract Opportunities	
W7N7 USPFO ACTIVITY WVANG 167 (null)	Contract Specialist	Contract Opportunities	

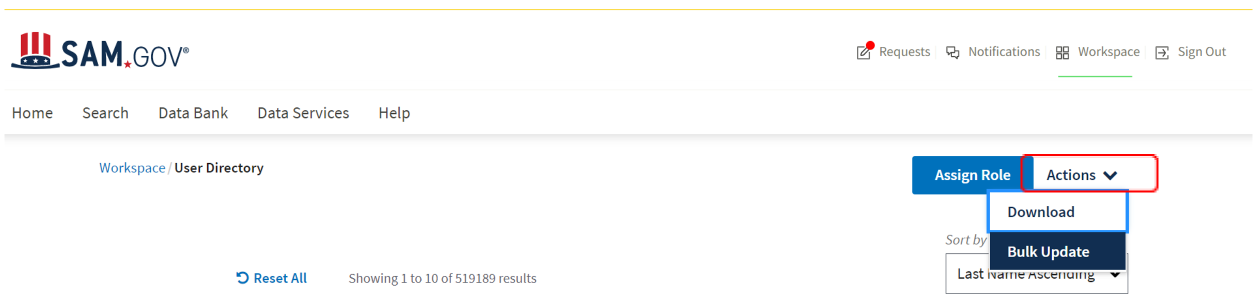
9.3 Federal Bulk Role Management

The bulk update feature enables federal Administrators to update user permissions for existing roles and change existing roles for multiple users at once. It cannot be used to assign roles. For example, you can use the bulk update feature to change permissions for everyone with the Contracting Officer role in the contract opportunities domain. Or, you could use the feature to remove the Sensitive Entity Management Data Viewer role from a group of users in the entity registration domain.

Federal Administrators can access bulk update in two ways.

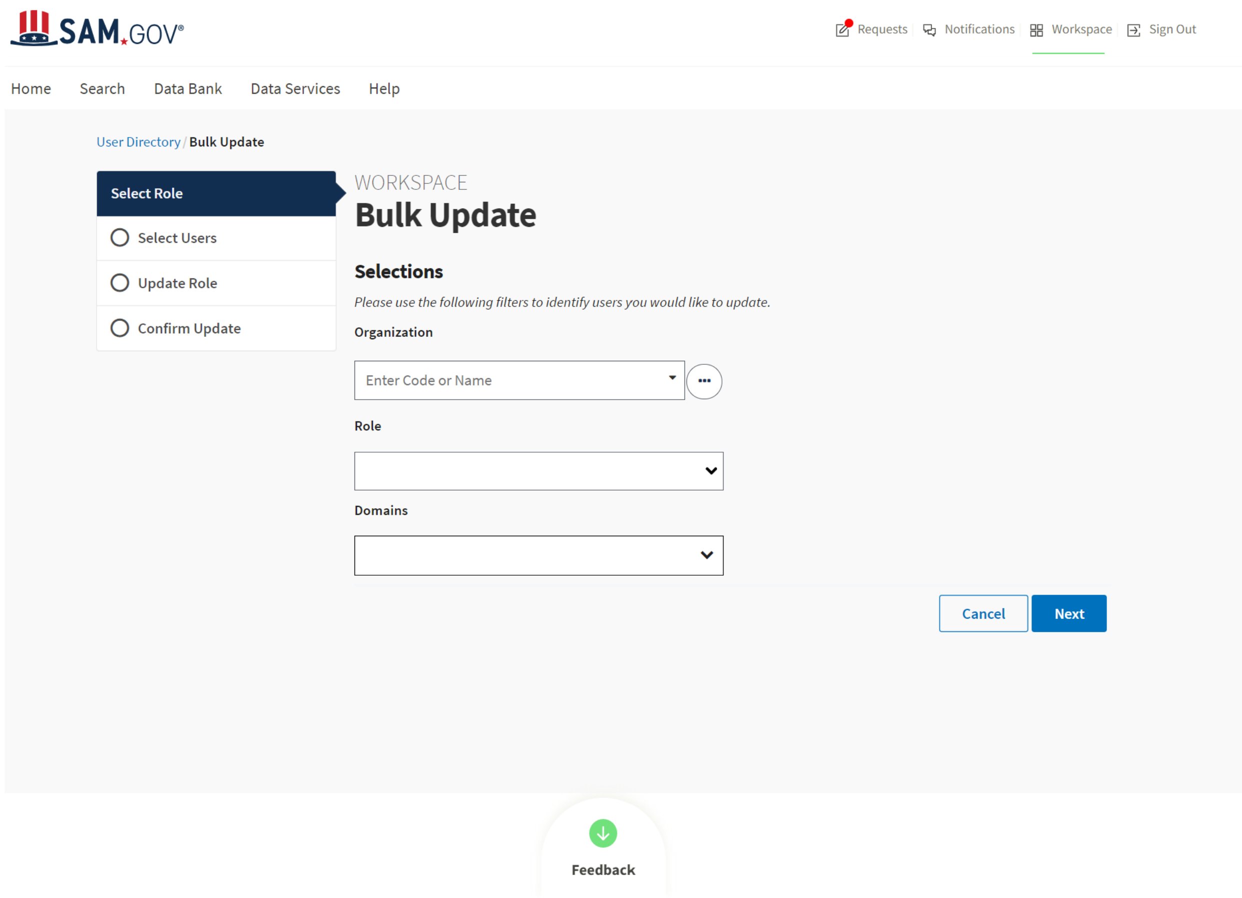
From your Workspace, find the User Directory widget and select the “Bulk Update” button.

Or, in the User Directory itself, you can select the “Actions” menu and choose “Bulk Update.”



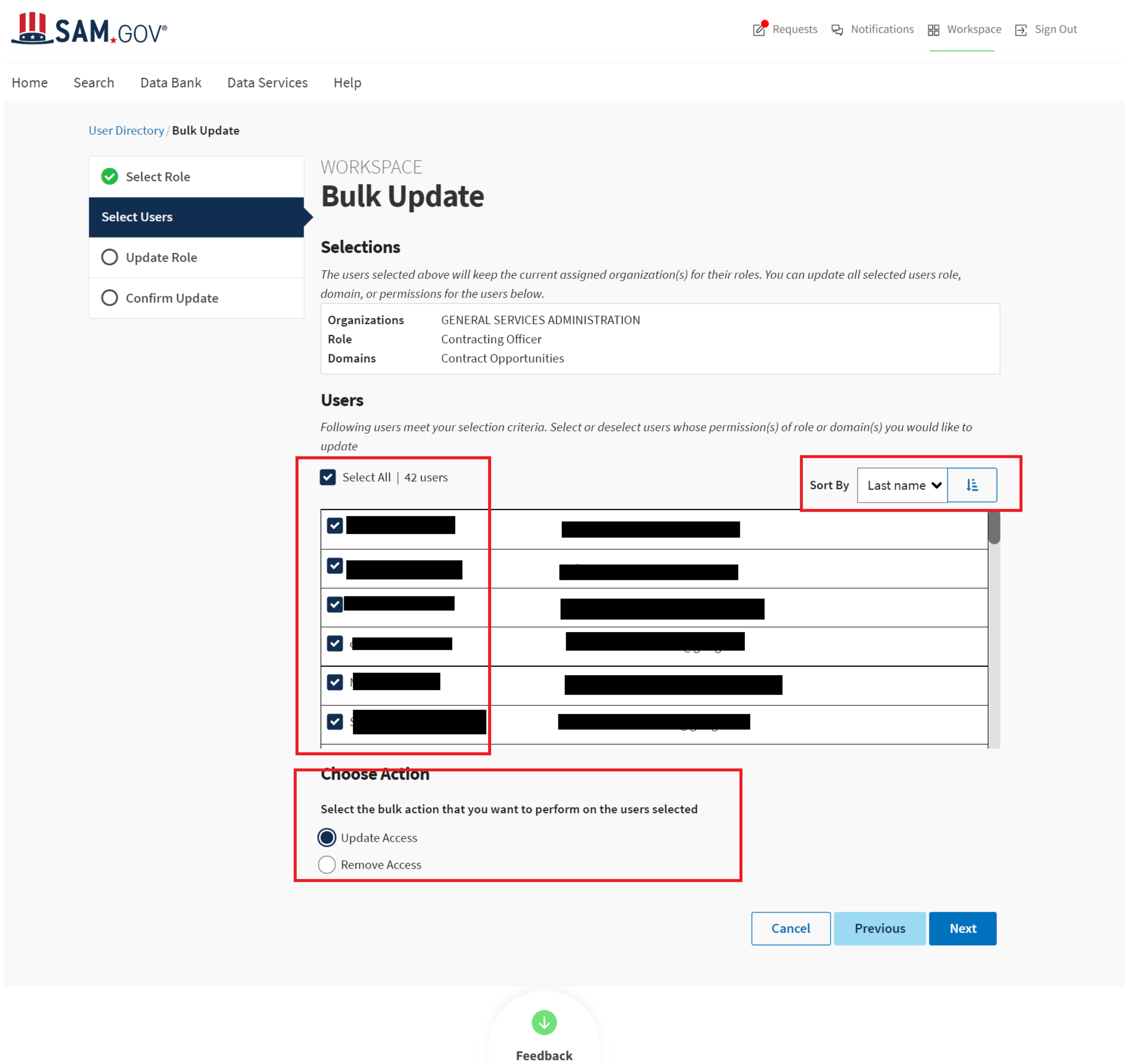
9.3.1 Selecting a Role

Once you have opened the Bulk Update page, the first step is to select an organization, role, and domain. Select "Next."



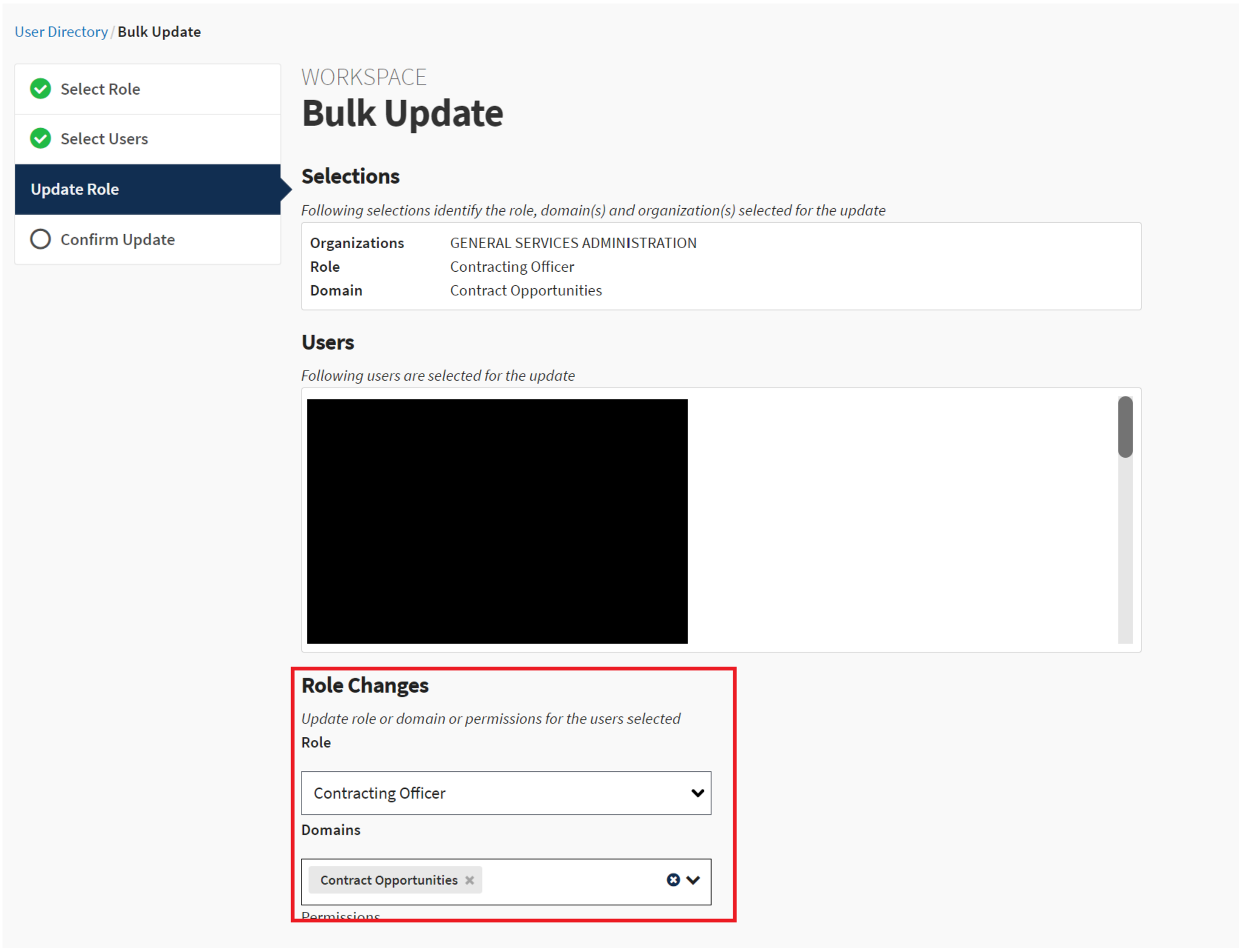
9.3.2 Selecting Users

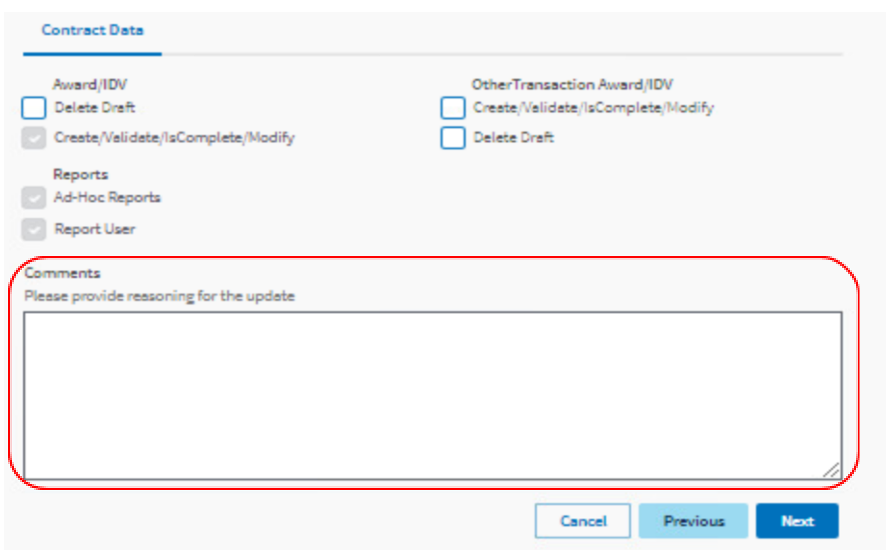
On the next page, select the users you want to update. You can filter the users and sort by email or last name. Then choose whether to update the role or remove the role from those users. Select “Next.”



9.3.3 Updating a Role

If you choose to update the role, you can change the role to a different role, change the domain of the role, or change the permissions associated with the role. If you change the role or the domain, you will remove the old role and domain. The action will apply to all users listed.

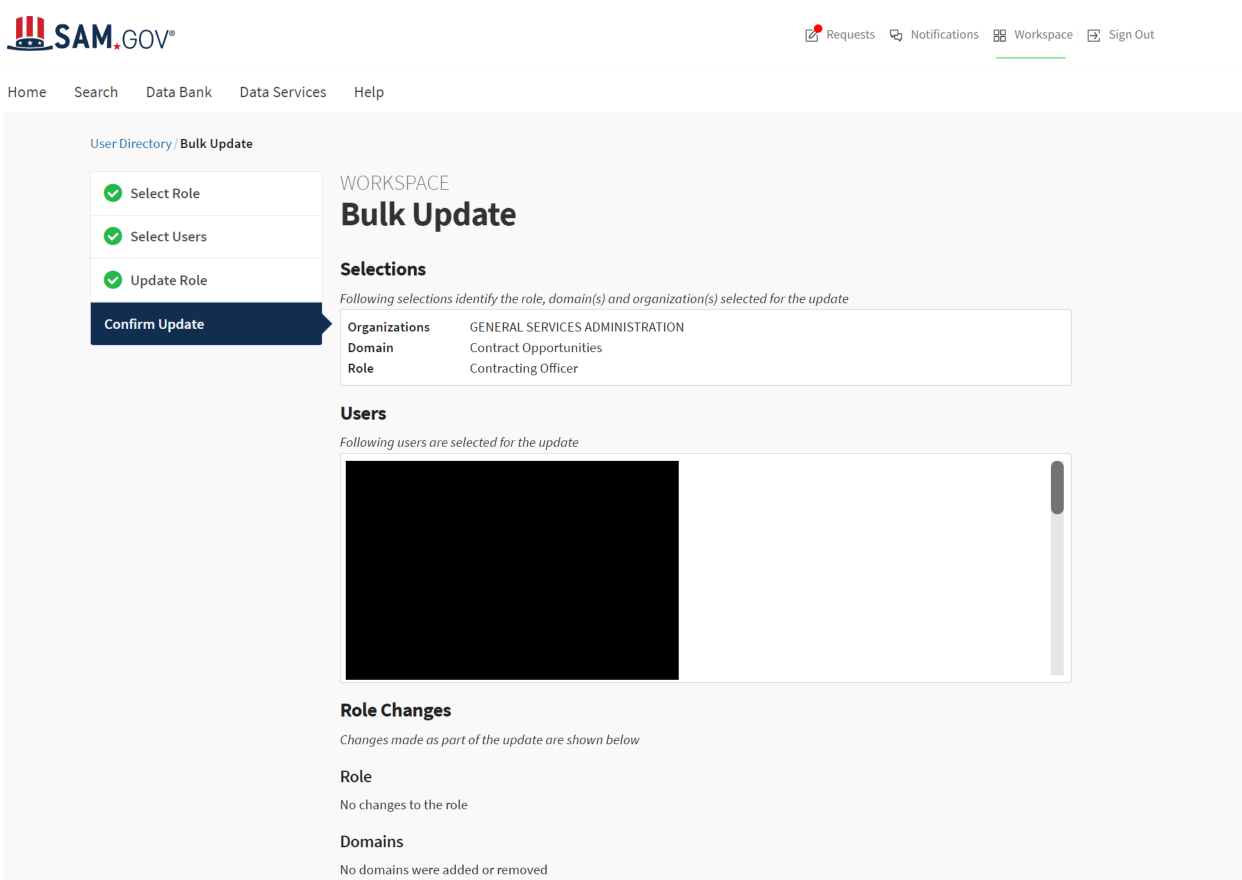




You will see the organization, role, and domain selected for update, the users selected for changes, the role and domain changes, permissions associated with the role changes, and a space to leave comments for reference. If multiple organizations are being updated, there will be an entry for each of the organizations.

9.3.4 Confirming a Role or Permission Update

Once you have made all your updates, you will see a confirmation page for review and acceptance. On the confirmation page, you will see the organization, role, and domain selected for update, the users selected for changes, role changes, associated permissions (with plus and minus icons to indicate additions and removals), and your comments. You can then cancel, go back to the previous page to correct errors, or select “Done” to make the changes.



Permissions

Contract Opportunities

ATTACHMENTS

- Delete Attachment
- Create Draft Attachment
- Delete Draft Attachment
- Release Draft Attachment
- Assign Attachment
- Edit Draft Attachment

NOTICES

- Delete Draft Notice
- Edit Award Notice
- Create Award Notice
- Unarchive Notices
- Archive Published Notice
- Cancel Published Notice
- Edit Published Notice
- Publish Draft Notice
- Edit Draft Notice
- Create Draft Notice
- Search Draft Notices
- View Draft Notice

REPORTS

- Ad-Hoc Reports
- Report User

INTERESTED VENDOR LIST

- Enable/Disable VV_IVL_NL
- Enable/disable IVL_NL
- View Interested Vendors

SITEWIDE SEARCH

VENDOR ACCESS CONTROL

- Edit rejected requests
- Add Authorized Party
- Approve/Reject Pending Requests
- Search Approved Requests
- Search Rejected Requests
- Search Pending Requests

EXTERNAL SYSTEM DELEGATION

- Front End Data Entry is Allowed

Comments

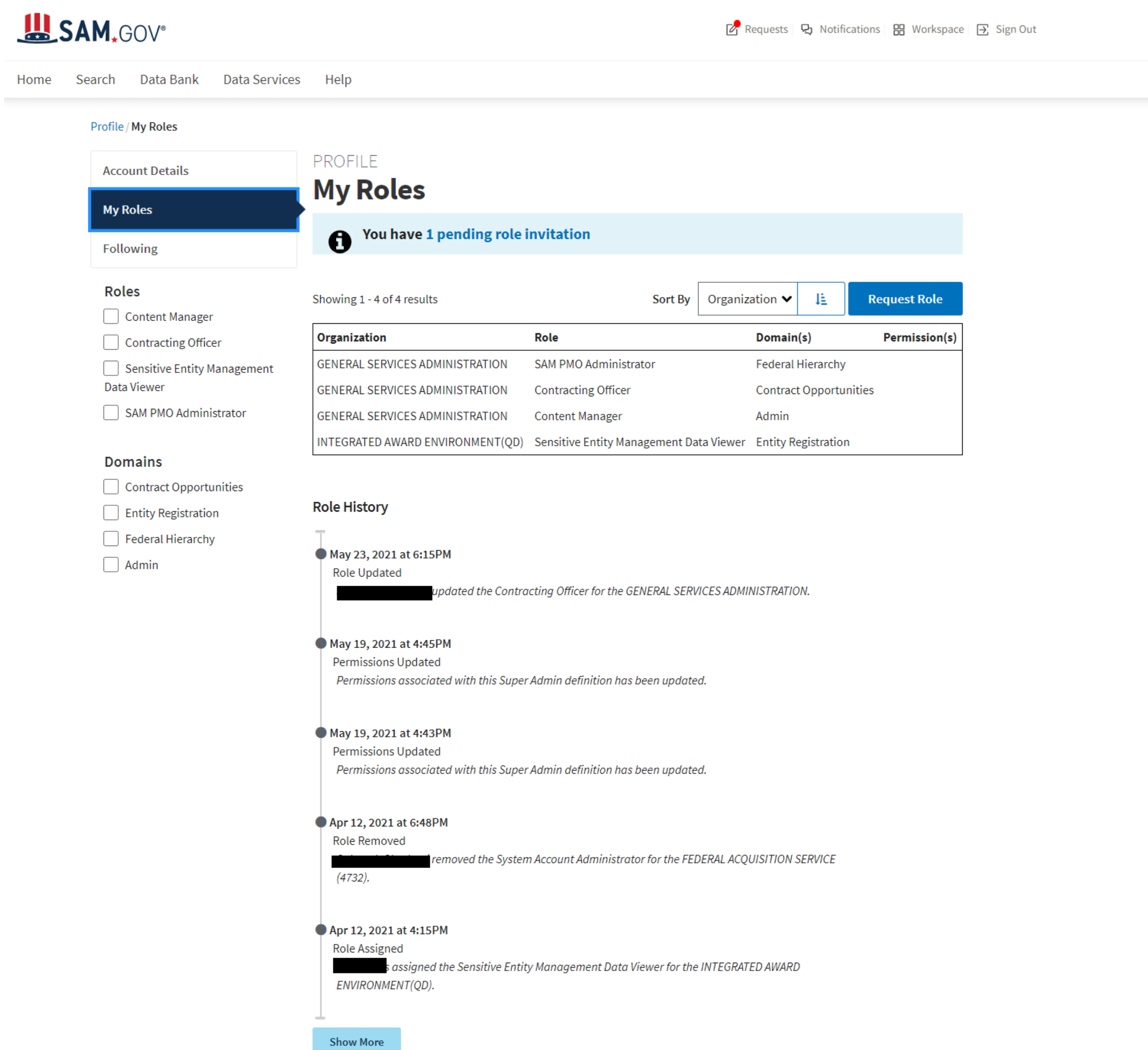
test

Cancel Previous Done

Feedback

10. Role Management History View

You can see the history of your role assignments on the My Roles page. When you request or are assigned a role, it will appear in the “Role History” section at the bottom of the My Roles page. To view your role history, navigate to your Workspace, select the “Profile” link, then open the “My Roles” tab.


SAM.GOV® Requests Notifications Workspace Sign Out

Home Search Data Bank Data Services Help

Profile / My Roles

Account Details
My Roles
Following

Roles
Content Manager
Contracting Officer
Sensitive Entity Management Data Viewer
SAM PMO Administrator

Domains
Contract Opportunities
Entity Registration
Federal Hierarchy
Admin

PROFILE
My Roles

You have 1 pending role invitation

Showing 1 - 4 of 4 results Sort By Organization Request Role

Organization	Role	Domain(s)	Permission(s)
GENERAL SERVICES ADMINISTRATION	SAM PMO Administrator	Federal Hierarchy	
GENERAL SERVICES ADMINISTRATION	Contracting Officer	Contract Opportunities	
GENERAL SERVICES ADMINISTRATION	Content Manager	Admin	
INTEGRATED AWARD ENVIRONMENT(QD)	Sensitive Entity Management Data Viewer	Entity Registration	

Role History

May 23, 2021 at 6:15PM
Role Updated
[redacted] *updated the Contracting Officer for the GENERAL SERVICES ADMINISTRATION.*

May 19, 2021 at 4:45PM
Permissions Updated
Permissions associated with this Super Admin definition has been updated.

May 19, 2021 at 4:43PM
Permissions Updated
Permissions associated with this Super Admin definition has been updated.

Apr 12, 2021 at 6:48PM
Role Removed
[redacted] *removed the System Account Administrator for the FEDERAL ACQUISITION SERVICE (4732).*

Apr 12, 2021 at 4:15PM
Role Assigned
[redacted] *assigned the Sensitive Entity Management Data Viewer for the INTEGRATED AWARD ENVIRONMENT(QD).*

Show More