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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 <u>System Account User Guide</u>.

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 <u>here</u>.

Roles are also assigned by **organization**. For federal organizations, this means that your role applies within your <u>department or independent agency</u>, <u>sub-tier</u>, or <u>office</u>. 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 <u>here</u>.

If there are no current Administrators for your agency, you need to create a ticket with the Federal Service Desk (<u>fsd.gov</u>) 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 <u>this FAQ</u>.)

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.

User Directory	Bulk Update			
Who are you looking for?				
Search by Username				
	-			

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.

An offic	ial website of th	ne United States gov	ernment <u>Here's how you</u>	<u>know</u> ~					
	SAM.	€V0€			🗗 Requests	न्द्र Notific	ations	B Workspace	Sign Out
Home	Search	Data Bank	Data Services	Help					
	Workspa	ce / User Directo	ory			Assign	Role	Actions 🗸	
		්ට Reset All	Showing 1 to 7 of 7 re	esults		Sort E	by st Name	Ascending	~
	User							Actions •	✓
		•	Last Sign In: Aug 20						
	Entity Name	•	Last Sign In: May 14					Actions •	~
	Unique E	intity ID						Actions •	×
	CAGE Co	de	Last Sign In: Jun 16						
	Dala Adu							Actions •	~
	User administ	s whom I er	Last Sign In: Apr 20					Actions •	✓
	Role		Last Sign In: Apr 6						
	Data	Entry ortunities trator	Last Sign In: Apr 6					Actions •	*
	UEII	ver						Actions •	*
	My Doma Entit Registrat Entit Reportin	ty tion ty g	Last Sign In: Apr 6		1				

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.

Add A New 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

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 <u>this FAQ</u>.

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

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.

Request Details							
Organization							
The organization for y	our role request may h	be different	from th	ne			
organization where w	ou work.						
Note: Few people will	l need roles at the depa	artment or	sub-tier	level.	Fips to find y	our Office	:
less				E	Enter office codes owest level organ	or keywords nization wher	s in the search field to sele re you work.
Enter Code or Name			×	•	Office Name CGAC		
				-	Arency Code		
					,		
Federal Hierarchy	Filter By	Sele	cted Values			Clear]
Federal Hierarchy	Filter By Subtler	Sele	cted Values Code	Name		Clear	
Federal Hierarchy	Filter By Subtler Enter Code or Name	Sele	cted Values Code) 4732	Name	SERVICE	Clear Level Subter	
Federal Hierarchy	Filter By Subler Enter Code or Name Major Command	Sele	cted Values Code) 4732) 4725	Name FEDERAL ACQUISTION FEDERAL PROPERTY RE	SERVICE SOURCES SERVICE	Clear Level Subter Subter	
Federal Hierarchy	Filter By Subter Enter Code or Name Major Command Enter Code or Name	Sele	cted Values Code) 4732) 4725) 4700	Name Federal Acquisition Federal Acquisition General Services Ad	SERVICE SOURCES SERVICE MINISTRATION	Clear Level Subtar Subtar Subtar	
Federal Hierarchy	Filter By Subtler Enter Code or Name Major Command Enter Code or Name Sub Command	Sele	cted Values Code) 4732) 4725) 4700) 4712	Name FEDERAL ACQUISTION FEDERAL ROPERTY RE GENERAL SERVICES AD GSA BOARD OF CONTR.	SERVICE SOURCES SERVICE MINISTRATION KCT APPEALS	Clear Level Subtar Subtar Subtar Subtar	
Federal Hierarchy	Filter By Subtler Enter Code or Name Major Command Enter Code or Name Sub Command Enter Code or Name	Sele X X X	cted Values Code 4732 4725 4700 4712 4701	Name FEDERAL ACQUISTION FEDERAL PROPERTY RE GENERAL SERVICES AD GSA BOARD OF CONTR IMMEDIATE OFFICE OF	SERVICE SOURCES SERVICE MINISTRATON KCT APPEALS THE ADMINISTRATOR	Clear Level Subter Subter Subter Subter Subter	
Federal Hierarchy	Filter By Subtler Enter Code or Name Major Command Enter Code or Name Sub Command Enter Code or Name Office	x C	cted Values Code) 4732) 4700) 4712) 4701) 4712	Name FEDERAL ACQUISTION FEDERAL ACQUISTION GENERAL SERVICES OF GENERAL SERVICES OF GENERAL SERVICES OF INFORMATION SECURIT	SERVICE SOURCES SERVICE MINISTRATION KITCAPPEALS THE ADMINISTRATOR Y OVERSIGHT OFFICE	Clear Level Subtar Subtar Subtar Subtar Subtar	
Federal Hierarchy	Filter By Subtler Enter Code or Name Major Command Enter Code or Name Sub Command Enter Code or Name Diffice Enter Code or Name	Sele X X X	Code 4732 4725 4721 4721 4701 4710 4720	Name FEDERAL ACQUISITION FEDERAL PROPERTY RE GENERAL SERVICES AD GSA BOARD OF CONTR IMMEDIATE OFFICE OF INFORMATION SECURI INFORMATION SECURI INFORMATION SECURI	SERVICE SOURCES SERVICE MINISTRATION KCT APPEALS THE AQUINISTRATOR Y OVERSIGHT OFFICE KOOY SERVICE	Clear Level Subter Subter Subter Subter Subter Subter	
Federal Hierarchy	Filter By Subter Enter Code or Name Major Command Enter Code or Name Sub Command Enter Code or Name Office Enter Code or Name	Sele	Code 4732 4725 4700 4721 4720 4720 4720 4720 4720	Name FEDERAL ACQUISITION FEDERAL PROPERTY RE GENERAL SERVICES AD GS BOAD OF CONTR IMEDIATE OFFICE OF ACQUISITIO OFFICE OF ACQUISITIO	SERVICE SOURCES SERVICE MINISTRATION ICT APPEAS INFE ADMINISTRATOR YOURSIGHT OFFICE ILOGY SERVICE N POUCY	Clear Level Subtar Subtar Subtar Subtar Subtar Subtar Subtar	

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

Cancel Se

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.

📕 An offic	ial website of th	e United States gove	rnment <u>Here's how you</u>	<u>know</u> ∨				
	SAM <u>,</u> G	°V08			🛃 Requests	₽ Notifications	He Workspace	🕂 Sign Out
Home	Search	Data Bank	Data Services	Help				
		PROF	ILE					
		Req	uest Role					
		Note: A	Il fields are required	d.				
		Requ	est Details					
		Entity		Requ	lired			
		To be a	ssigned additional	roles and				
		permis more	sions for an organiz	ation, you m	ust			
		Ente	r DUNS, UEI, LBN, (CAGE, DoDA	٩٣			
		Role		Requ	lired			
		The fol	lowing roles are ava	ilable based	on			
		your pi	rofile. If you need an	administrat	ive			
		more						
		Sele	ct a Role		~			
		Domai	n	Rea	uired			
		You ma	•• •v select more than	one domain	if			
		appror	oriate.	one domain,				
		Selec	t a Domain		~			
		Additio	onal Details	Rea	uired			
		Provid	e additional details	about vour	in cu			
		positio	n and why you need	the request	ed			
		more						
					1			
				ſ				
					Cancel	Submit		

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.

Entity Required To be assigned additional roles and permissions for an organization, you must more

Enter DUNS, UEI, LBN, CAGE, DoDAAC

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.

Role	Required		
The following roles are avail	able based on		
your profile. If you need an administrative			
more			
Select a Role	~		

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.

Role The following roles are ava your profile. If you need an more	<i>Required</i> ailable based on n administrative
Select a Role	~
Domain You may select more than appropriate.	<i>Required</i> one domain, if
Select a 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.

Additional Details Provide additional details ab position and why you need t more	<i>Required</i> bout your he requested	

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.

PROFILE Requ	est Role			
The	re are errors with the followi Supervisor Name is requi Supervisor Email is requi An Organization is requir Additional Details are req	ng fields: red red ed uired		
All fields are re Your Super Provide conta role administr Note: Your su	equired. visor ct information for your direct ator needs to verify details. pervisor does not need an acc	supervisor in case you count at this site.		
Supervisor Supervisor	Name Name is required		1	
Supervisor Supervisor	Email Email is required]	

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.

A	You have 1 pending role request		
0	Data Entry for Contract Opportunities at the OCTO CONSULTING GROUP, INC.	May 29, 2020	Pending

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.

/sert [] pmail.com			Pend	ding
wity: OCTO CONSULTING GROUP, INC.			4.24	pPs/
CAGE: 4RSC0 DUNS: 800127859				
iole: Data Entry				
omain: Contract Opportunities				
dditional Information				
you are an Administrator rejecting the request, you must provi	de an explans	ation in the r	message field b	elow
therwise, a message is optional.				
			Back Del	lete
mments		1	Back Del	lete
mments e the comments to chat with the admin if you need to clarify an	y role assign:	ment details	8ack Del	iete
mments e the comments to chat with the admin if you need to clarify an <u>our previous comments</u>	y role assign:	ment details	Back Del	lete
mments a the comments to chat with the admin if you need to clarify an <u>tor crevious comments</u> Type your message and hit Enter	y role assign	ment details <u>H</u>	Back Del	iete
mments the comments to chat with the admin if you need to clarify an <u>our orevious comments</u> Type your message and hit Enter	y role antigro	ment details H	Back Del	lete

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.

Showing 1 to 10 of 2002 results	Last Name Ascending 👻
sba 1.0	Actions 🗸
	View Access
Last Sign In: 1,04	Assign Role
UAT Tester 2.0	ALDUID V

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).

	SAM,G)ov				🛃 Requests 🖳 N	otifications 🔡 Wo	orkspace 📑 Sign Out
Home	Search	Data Bank	Data Services	Help				
			WORKSPAC	E				
			Assign R	ole				
			Note: All fields o	are required.				
			User:					
			Organization		Required			
			organization. E	nter office codes or keywords in t	he search field (Office			
			more					
			Enter Code o	or Name	•			
			Role The following r administrative	oles are available based on your p role, please reach out to your orga	orofile. If you need an anization's administrator.			
			Select a Role	2	~			
			Domains You may select	more than one domain, if applica	<i>Required</i> ble.			
			Select Domai	ins	~			
			Additional Info Please provide	rmation additional information	Required			
					Cancel	Assign		

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.

Organization Rec	quired
The organization for the requested role may be different from the def	ault
organization. Enter office codes or keywords in the search field (Office	
Name, CGAC, AAC, or Agency Code).	
Note: Only a few people will need to be associated at the department	tor
sub-tier level.	
less	
Enter Code or Name X	•

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

Filter By	Selected Values (0)		Clearall
Dept / Ind. Agency	Code	Name	Level
Enter Code or Name 🗙	047	GENERAL SERVICES ADMINISTRATION	Dept / Ind. Agency
Subtier	4752	FEDERAL ACQUISITION SERVICE	Subtier
Enter Code or Name 🗙	4725	FEDERAL PROPERTY RESOURCES SERVICE	Subtier
Major Command	4700	GENERAL SERVICES ADMINISTRATION	Subtier
Enter Code or Name 🗙	2000	GEN_TEST_SUB-TIER	Subtier
Sub Command	4712	GSA BOARD OF CONTRACT APPEALS	Subtier
Enter Code or Name X	4701	IMMEDIATE OFFICE OF THE ADMINISTRATOR	Subtier
	4710	INFORMATION SECURITY OVERSIGHT OFFICE	Subtier
Onice	4720	INFORMATION TECHNOLOGY SERVICE	Subtier
Enter Code or Name 🗙			
Show Inactive			
	Cance	el Select	

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.

Role The following roles are available based on your profile. If you administrative role, please reach out to your organization's o	<i>Required</i> u need an administrator.
	~
Domains You may select more than one domain, if applicable.	Required
	~

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 <u>Section 4</u>, 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.

The organization for the requested role may be different from the default organization. Enter office codes or keywords in the search field (Office more Enter Code or Name THESE-PESES Office The following roles are available based on your profile. If you need an administrative role, please reach out to your organization's administrator. Contract Specialist To mains The permissions below are typical for the selected role/domain combinations. more Contract Opportunities REPORTS Contract Opportunities REPORTS Contract Opportunities Report User Ad-Hoc Reports Report User Contract Data Draft Attachment Cost Draft Attachment Cost Cost Draft Attachment Contract Opportunities Contract Draft Notice Contract Opport Notice Contract Notice Contr	Organization	Required
Enter Code or Name (************************************	The organization for the requeste organization. Enter office codes o	ed role may be different from the default or keywords in the search field (Office
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4TPK10 - PBS R3 Office ★ Role The following roles are available based on your profile. If you need an administrative role, please reach out to your organization's administrator. Contract Specialist ✓ Domains Required You may select more than one domain, if applicable. ✓ Contract Opportunities ✓ Permissions Required The permissions below are typical for the selected role/domain combinations. ✓ more Contract Opportunities ✓ Contract Opportunities ✓ ✓ Report User ATTACHMENTS ✓ Search Approve/Reject Pending Requests ATTACHMENTS ✓ Search Approved Requests ✓ Search Panding Requests ✓ Oblete Draft Attachment ✓ View Interested Vendors EXTERNAL SYSTEM Delete Draft Notice ✓ Greate Draft Notice ✓ Front End Data Entry is Allowed Archive Published Notice ✓ Front End Data Entry is Allowed Create Draft Notice ✓ View Draft Notice ✓ View Draft Notice ✓ View Draft Notice ✓ View Draft Notice ✓ View Draft Notice ✓ View Draft Notice ✓ View Draft Notice ✓ View Draft Notice ✓	Enter Code or Name	
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Archive Published Notice Create Draft Notice	Schedule Reports	Approve/Reject Pending
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	Schedule Reports Ad-Hoc Reports Ad-Hoc Reports Report User ATTACHHENTS Create Draft Attachment Delete Draft Attachment Assign Attachment Edit Draft Attachment NOTICES Archive Published Notice Edit Draft Notice Create Draft Notice Search Draft Notice View Draft Notice	 Approve/Reject Pending Requests Search Approved Requests Search Rejected Requests Search Pending Requests INTERESTED VENDOR LIST View Interested Vendors EXTERNAL SYSTEM DELEGATION Front End Data Entry is Allowed

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

Additional Information Please provide additional information	Required	
	//	
	Cancel	Assign

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.

⊘ Role Assigned	
Success! You have assigned a role to kevin palmer.	
You may edit or remove this role from Profile.	

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.

SAM.GOV°			🛃 Requests 🖓 1	Notifications 🔡 Workspace	e 📑 Sign Out
Home Search Data Bank Da	ata Services Help				
Workspace / User Directory /	/ Role History				
	This is a historical view of this user's role. For	the current view, click here			
	WORKSPACE Bole History				
	Role HIStory				
	Administrator:	I			
	Change Date: May 18, 2021 at 11:40 AM				
	Organization(s): Technologies Corp.				
	Role: Data Entry				
	Domains: Contract Opportunities				
	Permissions:				
	Contract Opportunities				
	ATTACHMENTS	INTERESTED VENDOR LIST			
	Request to view Attachments through JCP	✔ Add Entity			
	 Request to view Attachments through Authorized Parties List 	✓ View List			
	REPORTS				
	V Report User				
	Ad-Hoc Reports				
	Fee	U dback			

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.

BAM *GOV*		🛃 Requests	R Notifications	B Workspace	∃ Sign Out
Home Search Data Bank Data Services Help					
Back to Requests					
Pending Role Invitation					
has a pending role invitation.					
Invited By: Invited Time: Sep 30, 2021 11:08 AM					
Business Justification					
screenshot for user guide					
Role Name: FOUO Entity Management Data Viewer					
Domain: Entity Registration - Update and submit entity registrations					
Federal Organization		Code			
GENERAL SERVICES ADMINISTRATION		047			
	Cancel	Close			

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

Aug 25, 2020	
SAM.GOV [®]	Requests 😼 Notifications 🎛 Workspace 🗗 Sign Out
Home Search Data Bank Data Services Help	
Back to Requests	
Has Accepted a Role Invitation	
Invited By: Invited Time: May 22, 2021 10:08 PM	
Accepted Time: May 22, 2021 10:20 PM	
has accepted the following role, domain, and entity assignment:	
Business Justification	
Tier 2 support	
Rote Name: Sensitive Entity management Data viewer	
Federal Organization	Code
GENERAL SERVICES ADMINISTRATION	047
	Class
	Close

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

	SAM,	€OV°				🖉 Requests	R Notifications	B Workspace	⊖ Sign Out
Home	Search	Data Bank	Data Services	Help					
	E	lack to Request	s						
			-	Has Declined a Role I	Invitation				
			Invited By: Invited Time: Sep 3 Declined Time: Sep has de	0, 2021 10:38 AM 30, 2021 10:44 AM clined the following role, doma	ain, and entity assignment:				
			Business Justif	ication					
			Screenshot for R	ole mgmt guide					
			Role Name: FO	JO Entity Management Da	ata Viewer				
			Domain: Entity F	egistration - Update and su	bmit entity registrations				
				Federal Organ	nization	Code			
						047			
			Additional Info	rmation					
			for role mgmt gu	de screenshot					
						Close	2		

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.

💻 An offici	al website of th	e United States gove	ernment Here's how you know ~				
	SAM.œ	€OV®		🕜 Requests 🖓	Notifications	BB Workspace	📑 Sign Out
Home	Search	Data Bank	Data Services Help				
Home	Search	Data Bank	Data Services Help Assign Role	eady have a role with and a link to sam.gov. If o accept the role when te a user account and me.			
			Domain Assign the user a domain. You may only select one domain time. Entries Enter a unique entity ID, CAGE, or legal business name to identify the entity. You may assign this role for more than more Business Justification Provide instructions or background information that will the user understand who is assigning them this role and with more Cancel	n at a one help why Send Invitation			

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, 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.

When you assign a role to someone who		
your entity, we will send them an email they already have a user account, they they sign in next. Otherwise they will be then to accept the role.	o doesn't have all with instructions will be prompted prompted to cre	eady have a role with and a link to sam.gov. If to accept the role when ate a user account and
Note: All fields are required.		
Email Address Enter the person's email address (Exam emailExample@domain.com). Addition more	ple: al form fields wil	
has already confirmed a ro to continue assigning another role, account.	le with one of yo please assign it t scept	ur entities. If you want o the existing user
Role Assign the user a role. You may only ass	ign one role at a	time.
Domain Assign the user a domain. You may only time.	select one doma	in at a
Entities Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this i more	business name to role for more than	none
Entitles Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this r more	business name to role for more than	none
Entities Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this r more	business name to	, none
Entities Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this is more Business Justification Provide instructions or background info the user understand who is assigning th more	business name to role for more that prmation that will nem this role and	n one help why
Entities Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this is more Business Justification Provide instructions or background info the user understand who is assigning the more	business name to role for more than prmation that will nem this role and	help why
Entities Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this a more Business Justification Provide instructions or background info the user understand who is assigning th more	business name to role for more than prmation that will nem this role and	help why
Entities Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this i more Business Justification Provide instructions or background info the user understand who is assigning th more	business name to role for more than prmation that will nem this role and	help why
Entities Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this is more Business Justification Provide instructions or background info the user understand who is assigning th more	business name to role for more than prmation that will nem this role and	help why
Entities Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this of more Business Justification Provide instructions or background infe the user understand who is assigning th more	business name to role for more than prmation that will nem this role and	help why
Entities Enter a unique entity ID, CAGE, or legal identify the entity. You may assign this of more Business Justification Provide instructions or background info the user understand who is assigning th more	business name to role for more than prmation that will nem this role and	help why

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 offic	cial website of th	e United States gove	rnment Here's how you k	<u>know</u> ~						
	SAM <u>,</u> G	€V0%				🛃 Requ	uests 몆	Notifications	B Workspace	∃ Sign Out
Home	Search	Data Bank	Data Services	Help						
Home	Search	BOV [®]	Data Services Assign Rc When you ass your entity, w they already h they sign in ne then to accept Note: All fields Enter the pers emailExample more Role Assign the use Select a Ro Domain Assign the use time. Rloace code	Help	o doesn't have alre with instructions. will be prompted to prompted to crea ple: al form fields will ign one role at a ti select one domai	eady have a role v and a link to sam o accept the role ate a user account ime.	with gov. If t and	Notifications	B Workspace	₽ Sign Out
			Please sele Entities Enter a unique identify the er more	ct a Role first e entity ID, CAGE, or legal I ntity. You may assign this r	business name to role for more than	✓				
			Business Just Provide instru the user unde more	tification uctions or background info rrstand who is assigning th	ormation that will I	help why				
					Cancel	Send Invitat	tion			

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.

An official website of the United States gover	nment <u>Here'show, you know</u> .∽	🖉 Requests 🖓 Notificatio	ns 🎛 Workspace 🕀 Sign Out
Home Search Data Bank	Data Services Help		
Workspace / Requests			
Requests	WORKSPACE		
Sent	Requests		
Received	Showing 1-1 of 1 results	Sort By	Request Date 🖌 🗜
Search Requests	has invited you to accept Data Entry role for Entity	Pending	
Find Requests	Registration at	01:54PM	
Search Deguaster	1	•	
	1		
•			
Search Approver	7		
~			
Entity			
~			
Request Type	_		
Role Invitations			
Note initiations			
Status			
Pending			
Approved			
Canceled			
Complete			
Declined			
Accepted			
Clear Filter	s		

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			

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.

Close

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: Invited Time: Jan 10, 1:00 PM				
Accepted Time: Jan 12, 2:00 PM				
has assigned you the following rol	e, 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 sul	bmit registrations			
Entity Name	Unique Entity ID			
	209302930			
	209302931			
	209302932			
Additional Information Thanks for the role invitation, I have accepted! this role here or is there a better way to reach or	May I inquire about permissions associated to ut for that?			

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:	
Invited Time: Jan 10, 1:00 PM	
Declined Time: Jan 12, 2:00 PM	
assigned you the following role,	domain, and entity combination:
Business Justification	
You have been invited to accept the following This role will facilitate your day to day operation	role based on your job description or function. xns.
Role Name: Data Entry	
Domain: Entity Registration - Update and su	bmit 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 to day operations.	: I will need this assignment to perform my day
	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 <u>Section 5</u>.

BAM ,GOV*		Requests : 당 Notifications : 쨆 Workspace : 중 Sign Out
Home Search Data Bank Data Servi	ices Help	
Workspace / User Directory		Assign Role Actions 🗸
ට Reset All	Showing 1 to 1 of 1 result	Sort by Last Name Ascending
User UAT Tester 13 × •	UAT Tester 13 Last Sign In: Apr 6	Actions 🗸
User Type Federal Users Non-Federal Users		1
Federal Hierarchy Enter your Department/Ind. Agency, Sub-Tier, Office, or other more		
Enter Code or Name		

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

<u></u> <u>⊯</u> s	AM.GOV*			🕜 Requests 🖳) Notifica	tions	B Workspac	e 📑 Sign Out
Home S	Search Data Bank Data Services	Help						
	Workspace/User Directory/Uat Tester 13							
	Account Details	USER DIRECTORY						
	Roles	Uat lester 13						
	Failte	Showing 1 - 1 of 1 results	Sort By	Entity Name 🗸	ΨE	Ass	ign Role	
	Entity	Entity	Role	Domain(s)		Perm	ission(s)	
	Search Entities 🗸 🗸		Administra	tor Entity Regist	ration ting	ø	Û	
	Roles	Frenchtown, MT, 59834-9564, USA			0			
	Administrator							-
	Domains	Role History						
	Entity Registration							
	Entity Reporting	• Apr v9, 2021 at 3:14PM Role Assigned SAM Migration assigned the Administrator for the						

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:	CAGE: 1HLR9 DUNS:	×	0 ~

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

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

 View Active/Expired Registrations
 View Draft/Work in Progress/Submitted

Additional Information

Registration

Required

Cancel

Done

×

Required

8 V

Please provide additional information

test

You can edit any aspect of the role, including the organization, role, domain, and permissions. As noted in <u>Section 4</u>, 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.

Additional Information Please provide additional information	Required
	Cancel Done

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 <u>Section 5</u>. Select the user's name to open their profile, and select the Roles page.

Account Details	USER DIRECTORY			
Roles	User has 2 pending role requ	ests		
Roles				
Administrator Contracting Officer	Showing 1 - 9 of 9 results	Sort By O	rganization 🗸 📙	Assign Role
Sensitive Entity Management	Organization	Role	Domain(s)	Permission(s)
Data Viewer Contract Specialist	ADMINISTRATIVE CONFERENCE OF THE U. S. (302)	Contract Specialist	Contract Data Contract Opportunities	e î
Management	ADMINISTRATIVE OFFICE OF THE U.S. COURTS (010)	Agency Administrator Entity Management	Entity Registration	e 🗎
Agency Administrator Exclusions Domains	FEDERAL ACQUISITION SERVICE (047)	Contract Specialist	Contract Data Contract Opportunities	P 🗓
Contract Data	GENERAL SERVICES ADMINISTRATION (047)	Agency Administrator Exclusion	s Exclusions	e 🕯
 Exclusions Contract Opportunities 	GENERAL SERVICES ADMINISTRATION (047)	Sensitive Entity Management Da Viewer	ta Entity Registration	ø 🕯
Entity Registration	TRANSPORTATION, DEPARTMENT OF (069)	Administrator	Contract Opportunities	/ û

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.

Sensitive Entity Management	Organization	Role	
Data Viewer	ADMINISTRATIVE CONFERENCE OF THE U.S.	Contract Specialist	
Delete Access		O	r Entity
Are you su	ire you want to delete the access for this user?		
Don C	Cancel Delete		r Exclusions
Contract Opportunities	GENERAL SERVICES ADMINISTRATION (047)	Sensitive Entity Man Viewer	agement Da
Entity Pogistration	TRANCDORTATION DEPARTMENT OF (000)	A dualisiatuatau	

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.

Roles					
Administrator	Showing 1 - 8 of 8 results	Sort By	Organization 🗸 📙	Assig	n Role
Contracting Officer	Organization	Role	Domain(s)	Perm	nission(s)
Data Viewer Contract Specialist	ADMINISTRATIVE OFFICE OF THE U.S. COURTS (010)	Agency Administrator Entity Management	Entity Registration	ø	Ê
Agency Administrator Entity Management	FEDERAL ACQUISITION SERVICE (047)	Contract Specialist	Contract Data Contract Opportunities	S	Ê
Agency Administrator Exclusions	GENERAL SERVICES ADMINISTRATION (047)	Agency Administrator Exclusio	ns Exclusions	A	<u>۵</u>
Domains	GENERAL SERVICES ADMINISTRATION (047)	Sensitive Entity Management Viewer	Data Entity Registration	B	Ŵ
Exclusions	TRANSPORTATION, DEPARTMENT OF (069)	Administrator	Contract Opportunities	B	۵.
Contract Opportunities	W7N7 USPFO ACTIVITY WV ARNG (null)	Contracting Officer	Contract Opportunities	B	۵.
	W7N7 USPFO ACTIVITY WVANG 130 (null)	Contract Specialist	Contract Opportunities	B ¹	۵.
	W7N7 USPFO ACTIVITY WVANG 167 (null)	Contract Specialist	Contract Opportunities	B	۵.

Role History

Sep 22, 2021 at 4:16PM
Role Removed
removed
removed the Contract Specialist for the ADMINISTRATIVE CONFERENCE OF THE U.S.
(302).

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.

ser Directory	Bulk Update
ho are you looking for?	
Type a name or email	×

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."

	SAM,GOV*		🕜 Requests	₽ Notifications	BB Workspace	🔁 Sign Out
Home	Search Data Bank	Data Services Help				
	User Directory / Bulk Upda	ate				
	Select Role	WORKSPACE Bulls Undate				
	O Select Users	Bulk Opdale				
	O Update Role	Selections				
	O Confirm Update	Presse use the following inters to identify users you would like to update. Organization				
		Enter Code or Name				
		Role				
		~				
		Domains				
		· · ·				
				Cancel	Next	
		V Feedback				

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."

Search	Data Bank	Data Services	Help											
User D	Directory / Bulk U	pdate												
	Calact Dala		WORKSPACE											
	Select Role		Bulk Up	date	•									
Sel	ect Users		Selections											
0	Update Role		The users selected o	ıbove will ke	eep the curre	ent assigned o	rganization(s)) for their ro	les. You car	update c	ill selected u	sers ro	le,	
0	Confirm Upda	te	domain, or permiss	ons for the GENER	users below. AL SERVICES	ADMINISTRA	TION							
			Role Domains	Contrac Contrac	ting Officer Opportuni	ties								
			lleare											
			Following users me	et your selec	ction criteria.	. Select or des	elect users wh	nose permis	sion(s) of ro	le or dom	ain(s) you w	ould lik	ke to	
		Г	update		1									٦.
			Select All 42	isers						Sort By	Last nam	ne 🗸	1E -	
			~											
			~											
							_	0 0						
			L hoose Actio											
			Select the bulk act	ion that yo	u want to pe	erform on the	users selecte	ed						
			Update Access											
		L	Remove Access											
											Duraulaura		Newt	
									Cance	21	Frevious		wext	

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.

WORKSPACE Bulk Undate
Bulk Undate
Built opulle
Selections
Following selections identify the role, domain(s) and organization(s) selected for the update
Organizations GENERAL SERVICES ADMINISTRATION Role Contracting Officer Domain Contract Opportunities
Users
Following users are selected for the update
Role Changes Update role or domain or permissions for the users selected Role Contracting Officer Domains Contract Opportunities × Permissions
ata
V Other Transaction Award/IDV sft. Create/Validate/IsComplete/Modify lidete/IsComplete/Modify Delete Draft eports er e reasoning for the update

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

Cancel

Previous

Next

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

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				
arch Data Bank Data Servic	es Help					
Profile / My Roles						
Account Details	PROFILE					
My Roles	My Roles					
Following	You have 1 pending role in	vitation				
Roles	Showing 1 - 4 of 4 results	Sort By	Organization 🗸 📙	Request Role		
Contracting Officer	Organization	Role	Domain(s)	Permission(s)		
Sensitive Entity Management	GENERAL SERVICES ADMINISTRATION	SAM PMO Administrator	Federal Hierarchy			
Data Viewer	GENERAL SERVICES ADMINISTRATION	Contracting Officer	Contract Opportur	nities		
SAM PMO Administrator	GENERAL SERVICES ADMINISTRATION	Content Manager	Admin			
Demola	INTEGRATED AWARD ENVIRONMENT(QD)	Sensitive Entity Management Da	ta Viewer Entity Registration			
 Federal Hierarchy Admin 	 May 23, 2021 at 6:15PM Role Updated May 19, 2021 at 4:45PM Permissions Updated Permissions updated Permissions associated with this Super A May 19, 2021 at 4:43PM Permissions Updated Permissions associated with this Super A Apr 12, 2021 at 6:48PM 	ing Officer for the GENERAL SERV dmin definition has been update dmin definition has been update	ICES ADMINISTRATION. d. d.			
	Role Removed Array of the System. (4732). Apr 12, 2021 at 4:15PM Role Assigned Control of the Sensitive Entity ENVIRONMENT(QD). Show More	Account Administrator for the FEL Management Data Viewer for the	DERAL ACQUISITION SERVICE			

