



FBO Transition to beta.SAM.gov

Federal Administrators

Quick Start Guide

This quick start guide is to assist **federal administrators** with migrating their organization from FBO.gov to Contract Opportunities in beta.SAM.gov. *Role Migrations in beta.SAM.gov will available immediately prior to FBO.gov decommissioning. Attempts made to migrate before that time will fail.*

Why is FBO.gov transitioning?

FBO.gov, along with all other government-wide acquisition systems managed by the Integrated Award Environment (IAE), is being modernized and consolidated at beta.SAM.gov. This will provide not only better security, data quality, and convenience for users, but will also reduce barriers for doing business with the government, reduce reporting burden, and increase transparency into federal spending.

What is beta.SAM.gov?

beta.SAM.gov is the name of the new, modernized system. Even though it says “beta”, it is currently authoritative for Assistance Listings and Wage Determinations. In November 2019, it will become authoritative for opportunities as well. Once the current SAM.gov is migrated, we will drop the “beta” and just be the new SAM.gov.

User Video:

<https://beta.sam.gov/cm/videos/detail?id=135>

What is Role Management

A ‘role’ is what is used on beta.SAM.gov to manage users and define what information they have the ability to access as well as which tasks will be available for them to carry out using their account.

User Video:

<https://beta.sam.gov/cm/videos/detail?id=186>

Role Management allows users access to specific information based on their role. Users who already have roles on legacy systems have the ability to automatically import those roles to beta.SAM.gov through a function called Migrate Roles

HOW TO MIGRATE YOUR ORGANIZATION

Step 1: Assess your roles and permissions in beta.SAM.gov

To begin this process you will need to assess your roles and permissions in beta.SAM.gov. To view your current roles and permissions, log in and go to your **Profile**. Look at the menu on the left and go to the **My Roles** link. You should be designated as an administrator for the Contract Opportunities domain. Check the organization and the permissions to make sure they match your responsibilities. If your role needs editing, reach out to another administrator to have them assign the accurate role attributes.

Step 2: Assess the accuracy of your organization’s information in the beta.SAM.gov Federal Hierarchy

beta.SAM.gov has implemented a consolidated federal hierarchy across all domains. With the transition from the FBO hierarchy to the beta.SAM.gov hierarchy, it is critical that the beta.SAM.gov hierarchy accurately describes your organization. This hierarchy is used to identify organizations posting in FBO and is tied to user roles.

To assess the accuracy of your organization's information in the Federal Hierarchy, you need to conduct a review of the hierarchy to ensure all information for your organization is correct. To view offices in your agency's federal hierarchy:

- Go to your workspace
- Go to the Federal Hierarchy link in the upper left-hand box.
- Select a sub-tier
- Click on the hierarchy tab in the left-hand column to see all offices related to that sub-tier.

The federal hierarchy administrator is the only person who can update or modify the hierarchy.

Step 3: Identify active opportunities tied to an inactive office

The third step is to validate that all active opportunities are associated with a valid office in the new federal hierarchy. As we move from the legacy FBO.gov hierarchy to the new beta.SAM.gov federal hierarchy, some opportunities will need to be reassigned to an active federal hierarchy office. If an opportunity is not associated with an active office, users may find data issues within reports, search results, and work spaces.

Immediately after the transition, you should go to your contract opportunity workspace, click on "Notice Federal Organization" and select Inactive to see the list of active opportunities which are not associated to a valid hierarchy. You can either contact the assigned contracting officer to edit and republish the opportunity CO or simply open the editor to update the office yourself. After the change, the notice public page will show the new office details, be accessible in the main opportunities workspace for users with roles to that office, be searchable through our federal organizations filters, and appear in any reports run for that office.

Step 4: Validate user roles in beta.SAM.gov

The fourth step is to validate that your users have successfully migrated their roles to beta.SAM.gov. Users can migrate their roles by creating an account and selecting **migrate my roles in** their profile. If users cannot migrate their roles, they will need to create a new role. They can request new roles by going to **Roles** in their profile.

You can share the [Login.gov Video](#) to help your users set up their account and [Role Management Video](#) for migrating and requesting roles. As much as possible, ensure your users are ready to go on Day One.

To access a list of your user's roles, navigate to Administration in your workspace and click user directory. You can view a list of your users by using the filters on the left navigation. You can also see an individual's assigned roles and role history by clicking on the user's name.

It is also important to note that some roles will have different names in beta.SAM.gov than they did in their legacy system, so users migrating their roles may notice a change in their role name. For example, users migrating roles will notice that the FBO roles of 'Buyer' and 'Limited Buyer' have been renamed 'Contracting Officer' and 'Contracting Specialist', respectively, within beta.SAM.gov. Please refer to the table below to see what FBO roles will be in beta.SAM.gov.



Step 5: Assign roles or approve role requests in beta.SAM.gov

Go to the role management related training materials in the Learning Center to learn more about approving, creating, editing and deleting roles. Note that users must have an account on beta.SAM.gov before you can assign them roles. Find out more by viewing the [Role Management Video](#).

Step 6: Be aware of new requirements when sending files through your contract writing system

IAE is working closely with your agency to establish the necessary interfaces to enable electronic submission of contract opportunity information to beta.SAM.gov. As part of the transition, each submittal from your contract writing system must identify the authorized user with an active beta.SAM account and we will validate that the user has the current Contract Officer or Contract Specialists role in beta.SAM.gov.

The new requirement mandates that the contracting officer associated with a contract opportunity must have an account in beta.SAM.gov and also hold the role of contracting officer with permission to post contract opportunities. This may require users who did not hold a role in FBO.gov to obtain a role as a contracting officer in beta.SAM.gov.

Step 7: Become familiar with the capabilities in the opportunities domain within beta.SAM.gov

There are several videos, quick start guides and frequently asked questions available in the Learning Center which provide you an overview of beta.SAM.gov capabilities. You can access the [Learning Center](#) from the hamburger menu at the top of the home page.