FBO Transition to beta.SAM.gov – Managing your Opportunities, Attachments and Interested Vendor Lists

This quick start guide is to assist **federal users of FBO.gov** with their transition to beta.SAM.gov. This document will provide an overview of how to manage your opportunities, attachments, and address the capabilities for creating and managing Interested Vendor Lists (IVL) associated with an opportunity. If your agency uses a contract writing system for submitting contract opportunities, please confirm that manual entry is authorized by your agency.

Please be sure that your account and roles are in place before you attempt these operations. You must be signed in to perform any of these operations.

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? **User Video:** https://beta.sam.gov/cm/videos/detail?id=135	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.
What is the interested vendor list?	The intent of this feature is to collect a list of vendors interested in competing for the opportunity or vendors interested in subcontracting opportunities. The contracting officer is the only person who can determine whether to include an IVL and the view settings for an IVL. Both contracting officers and contract specialists can view an IVL. Vendors responding to an IVL must be logged into beta.SAM.gov to respond.
How do I allow for an Interested Vendor List on my notice?	When you create a new solicitation or combined synopsis/solicitation you will be allowed to select whether you want to allow an IVL. You will also need to determine who will have visibility into the IVL. • Go to data entry in your workspace and select Create a contract opportunity. • In the general information tab you will be asked to Allow Vendors to Add to the IVL and to Allow Other Vendors to View. Allowing other vendors to view the IVL may be beneficial when subcontracting is expected.

How do I view the IVL after the opportunity is published?	Using a direct link, search or your workspace: ● Open the published opportunity ● In the left hand navigation of the opportunity you will find the IVL list You can only view this list online - there currently is no download feature.
How do I add, delete or edit the IVL feature after the solicitation is published?	While the opportunity is active, you may update the IVL functions initially published. ● Using a direct link, search or your workspace, select a contract opportunity. ● Select edit. If the edit option is disabled for you that means that a draft already exists for the notice. To open that draft to edit it, select the information icon that says, '"An unpublished draft revision exists for this notice, please click here to view it". ● In the general tab you will be asked to Allow Vendors to Add to the IVL and to Allow Vendors to View. Once you have modified these setting, you may publish an updated opportunity by clicking on the publish tab at the top.
How do I deactivate/reactivate an opportunity?	Deactivating an opportunity removes the opportunity from active status. A deactivated notice is still public and searchable. If you could possibly re-open the opportunity at a later date, deactivation provides the best solution. The opportunity can still be viewed in your history and may be reactivated. When you established an opportunity, you were required to complete the Inactive policy section to select the time frame when an opportunity will be deactivated and archived. After the opportunity is published, you may choose to instantly deactivate the notice. To deactivate: ● Go to the contract opportunity page in your workspace, locate the opportunity and go to the dropdown menu labeled, "Actions", and select "Deactivate". You will be required to provide the reason for deactivation. ● Once you have deactivated the opportunity, you may publish the updated opportunity by clicking on the publish tab at the top. The opportunity is no longer publicly accessible. ● All users following the post will be notified of the status change of the opportunity and the reason for the change.

	To reactivate: - Go to contract opportunity page in your workspace, locate the inactive opportunities and go to the dropdown menu labeled, "Actions", and select "Activate". - You will be required to update the Date Offer Due, the Inactive Policy section and provide a reason for reactivation. You may also edit other fields in the opportunity. - You may publish the updated opportunity by clicking on the publish tab at the top. The opportunity is now publicly accessible with the updated information. - All users following the post will be notified of the change in status for the opportunity.
How do I cancel an opportunity?	Cancelling an opportunity makes it inactive. A cancelled notice is still public and searchable. The opportunity can be viewed if users search in the inactive files. A notice should be cancelled if the acquisition process has stopped for some reason. Cancelled notices can be uncancelled in case the acquisition process starts again. To cancel: - Go to contract opportunity page in your workspace, locate the opportunity and go to the drop-down menu labeled, "Actions", and select "cancel". You will be required to provide the reason for cancellation. - Once you have canceled the opportunity, you may publish the updated opportunity by clicking on the publish tab at the top. The opportunity is search-able and viewable but will be labeled as canceled. - All users following the opportunity will be notified of the status change and the reason for the change. To uncancel: - Go to contract opportunity page in your workspace, locate the canceled opportunity and go to the drop-down menu labeled, ”Actions”, and select ”uncancel”. - You will be required to update the Date Offer Due, the Inactive Policy section and provide a reason for uncancelling. You may also edit other fields in the opportunity. - You may publish the updated opportunity by clicking on the publish tab at the top. The opportunity is now publicly

	accessible with the updated information. ● All users following the post will be notified of the change in status for the opportunity.
How do I delete an opportunity?	Deleting an opportunity removes the opportunity from public view and your workspace. Once an opportunity is deleted, it can no longer be viewed in your history and may not be reactivated. This action should only be taken if update, cancel or inactivate are for some reason not actions that can be used and the notice needs to be removed. The ability to delete either draft notices or published opportunities is permission dependent, so if you find any options locked, contact your administrator because you will likely need to be delegated this advanced permission. To delete: ● Go to contract opportunity page in your workspace, locate the opportunity and go to the dropdown menu labeled, "Actions", and select "Delete". You will be required to provide the reason for deletion. ● There will be a confirmation to insure this is the action you wish to take. Once you submit, the opportunity is no longer publicly accessible nor accessible through the workspace.. If the notice was removed for a security concern, you still must call the FSD help desk to report the issue and ensure all required steps are taken. ● All users following the post will be notified of the change in status for the opportunity and the reason for the change.

How do I manage attachments?	As a contracting officer or contract specialist, you made add attachments to any notice type. To add an attachment: ● Go to your workspace and select an active opportunity for the contract opportunity dashboard. Any inactive opportunity will need to be made active again before it can be edited. ● Start by locating the opportunity that you'd like to edit and click that opportunities' blue title. ● Located towards the top of each opportunity is an option called "edit". ● If the edit option is disabled, a draft already exists for the post. To open that draft to edit it, select the information icon that says, "An unpublished draft revision exists for this notice, please click here to view it".

	- In the "Attachments/Links" section, click browse to upload files from your computer to attach to your notice. You also have the ability to simply drag and drop a file from your computer's default file browser. Simply open your apple finder or windows explorer to the proper folder and drag the file into the designated box in the center of the screen. - Once you add the attachment, the system will begin a virus scan of the document. This will take some time depending on the size of the attachment. You will not be allowed to publish the opportunity until all attachments have successfully passed the virus scan. The status of the scans are available by going to the attachments section in the draft opportunity. - You have the ability to restrict access to controlled but unclassified information (CUI) in attachments by using the toggle in the attachments section. If you choose to limit access, you will be responsible for authenticating requests for access. You will receive an email when an access request is pending your approval. You will also see a log of these requests and status of the requests from your workspace.
Following transition to beta.SAM.gov, how do I identify opportunities tied to an inactive office?	As we moved from the legacy FBO.gov hierarchy to the new beta.SAM.gov federal hierarchy, some active opportunities are no longer tied to an active federal hierarchy office and require reassignment. 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 your active opportunities which are <u>not</u> associated with a valid hierarchy. Open the editor to update the office and publish. After the change, the opportunity will: - Display the new office - Update access to all Federal users with roles in that office - Be searchable through the federal organizations filters, and - Appear in any reports run for that office.