

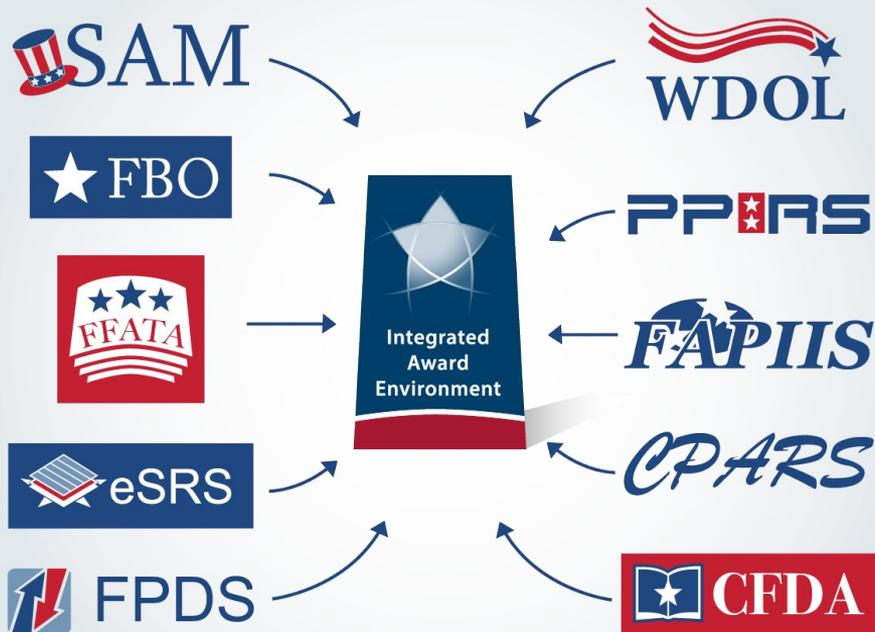
# Industry Day

## Role Management, Workspace, and More - What Does Industry Need?

Vicky Niblett, IAE Deputy Assistant Commissioner  
Christy Hermansen, IAE Design Lead  
Maureen Healy, User Analyst Contractor

June 13, 2017

# The IAE Mission



**The Integrated Award Environment**

- Reducing barriers for doing business with the Government
- Increasing transparency into federal spending
- Increasing accountability in the award process
- Reducing reporting burden
- Increasing data quality and integrity

# Agenda

- **Modernization Overview and Update** - 20 minutes
- **Upcoming Focus Group Topics** - 30 minutes
  - Managing your organization
  - Managing your user accounts and roles
  - Workspace
  - Data Entry
- **Questions** - 10 minutes

# Modernization Overview



**One website for people who make, receive, and manage federal awards**

- One Home Page
- Single Sign-On
- Search
- Reports
- Workspace
- Administration
- Help Center



# Beta.SAM.gov



- **Beta.SAM.gov** will launch in Q4 FY17 and coexist with SAM.gov
- All 10 current operational systems will run in parallel to the beta site and **will remain the authoritative sources** until they are decommissioned
- Beta.SAM.gov to eventually become SAM.gov



# SAM.GOV TIMELINE

FOUR YEAR PLAN

SEARCH

REPORTING

DATA ENTRY

ADMINISTRATION

SYSTEM INTERFACES

Q4 FY2017



**Launch!**  
All publicly available data from SAM, CFDA, FBO, FPDS, WDOL, and FH can be searched and viewed on beta.SAM.gov

	Q1-Q2 FY18	Q3-Q4 FY18	Q1-Q2 FY19	Q3-Q4 FY19	Q1-Q2 FY20	Q3-Q4 FY20
ASSISTANCE LISTINGS		<b>ENHANCEMENTS</b>				
CONTRACT OPPORTUNITIES			<b>ENHANCEMENTS</b>			
CONTRACT DATA					<b>ENHANCEMENTS</b>	
ENTITY INFORMATION				<b>ENHANCEMENTS</b>		
WAGE DETERMINATIONS			<b>ENHANCEMENTS</b>			
PAST PERFORMANCE						
SUB AWARD DATA					<b>ENHANCEMENTS</b>	

# What to Expect in beta.SAM.gov

- **Search** assistance listings, contract opportunities, contract data, entity registrations, entity exclusions, Federal Department/Independent Agency, Federal sub-tiers, and wage determinations
- **Create a user account** with single sign-on for all of beta.SAM.gov
- Learn about federal awards and how to use beta.SAM.gov in one **Help Center**



# One Website Means...

## Naming Conventions are Changing

- CFDA → Assistance Listings
- FBO → Contract Opportunities
- FPDS → Contract Data
- SAM → Entity Information
  - Registrations
  - Exclusions
- WDOL → Wage Determinations

**There's no "FBO"  
or "FPDS" or other  
section of the  
website organized  
by legacy system**



# Beta.SAM.gov Demo

- Home page
- Help Section
- Search
  - Across all domains
  - Across an individual domain

# Interpreting the Roadmap

- Legacy systems are being transitioned incrementally
  - Will run in parallel with beta.SAM.gov
- “Remaining functionality implemented” on the roadmap does not mean the legacy systems will be decommissioned
- Agile delivery
  - Continuing enhancements to implemented features
  - Incorporating user feedback

# What You Can Do

- **Search** the public data sets and provide feedback
  - How effective is the keyword search?
  - What additional filters would be helpful?
- **Navigate** the website
  - What couldn't you find?
  - What is confusing?
- Browse the **Help Center**
  - Become familiar with the new terminology
  - Learn how to stay up to date on what's coming

# SAM.gov Transition

- New registrations and updates will move to the modernized platform in Q1FY19
- Current and historical data will be retained
- Users with existing roles may retain their roles- although users will need to create a new account and migrate their roles on the new site.
- Current APIs and data extracts will be available - although certification process may change

# Upcoming Focus Groups

- Industry Topics
  - Managing your Organization
  - Managing your Users and Roles
  - Workspace
  - Data Entry including Registration

# Managing Your Organization

- Vendor profile - what does that look like?
  - As an interested vendor for opportunities
  - For past performance
  - Is it your registration information?
- Do you want relationships between your DUNS
  - Views across an entire organization?
  - Roll up of awards, sub-awards, performance...?

# Managing Your Users and Roles

- Many user accounts for one entity - what does that look like?
- For an entity, do you need a centralized view across all functionality to see who has access?
- How will migrating access from legacy systems work?
- How much is it possible to standardize how access is managed across the site?

# Managing Access in Legacy Systems

## Entity Registration

Assigned by an entity administrator

## Past Performance

Authorized by government

## Opportunities

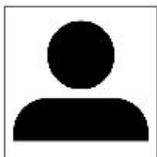
Self-Assigned claiming  
DUNS / CAGE

## Sub-Awards

Self-Assigned claiming  
a DUNS

[Profile](#) > My Access

**⚠ You have submitted [1 Pending Requests](#)**



**Jeffrey Abbot**

jeffrey.abbot@solidconcreteindustries.com



PROFILE

## My Access

Showing 1 - 20 of 71

Sort By

Organization ▾

Advanced

Clear

Domain ▾

Entity Registration (71)

Organizations

**Solid Concrete Industries**  
105675137

**Solid Concrete Plus**  
162764533

**SCI Global**  
165487738

**Solid Concrete West**  
188187499

**Solid Concrete Midwest**  
247481822

**Solid Concrete Pacific**  
251039232

Domain

Entity Registration

Entity Registration

Entity Registration

Entity Registration

Entity Registration

Entity Registration

Role

[Entity Administrator](#)

[Entity Administrator](#)

[Entity Administrator](#)

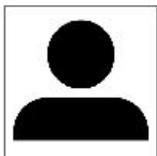
[Entity Administrator](#)

[Entity Administrator](#)

[Entity Administrator](#)

[Profile](#) > My Access

**⚠ You have submitted [1 Pending Requests](#)**



**Jeffrey Abbot**

jeffrey.abbot@solidconcreteindustries.com

[Search](#)

PROFILE

**My Access**

[Request Access](#)

Showing 1 - 3 of 3

Sort By  ▼

**Organization** —

[Advanced](#)

[Clear](#)

**Domain** —

- Contract Opportunities (1)
- Entity Registration
- Sub-Awards (1)

Organizations	Domain	Role
Solid Concrete Industries	Contract Opportunities	<a href="#">Verified Entity Representative</a>
Solid Concrete Industries	Entity Registration	<a href="#">Entity Administrator</a>
Solid Concrete Industries	Sub-Awards	<a href="#">Entity Administrator</a>

# Workspaces in Legacy Systems

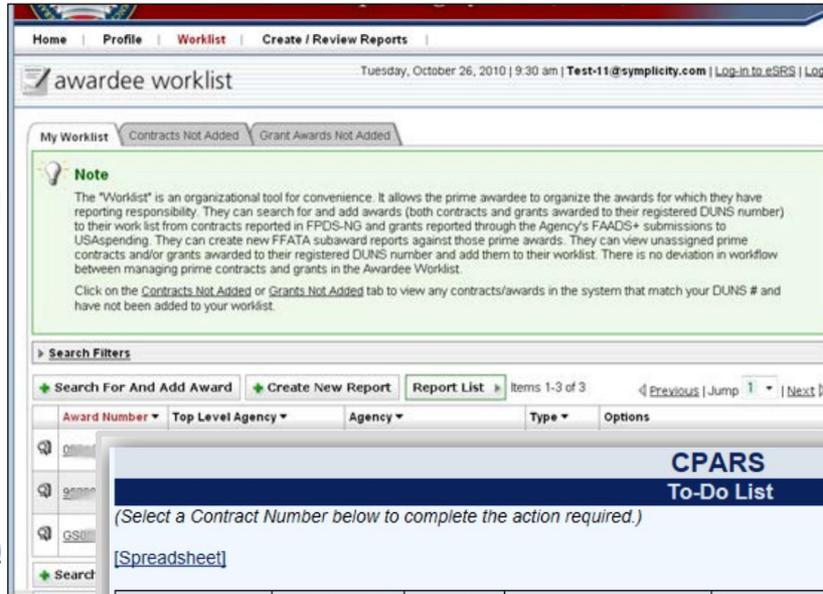
- Different in every system
  - My SAM
  - My FBO
  - Sub Award Worklist
  - Past Performance To Do List
- What does it look like if you have one workspace
- What features do you need to keep track of your “stuff”

# Workspaces in Legacy Systems

## My FBO

### Quicklinks

-  [View Watched List](#)
-  [View Saved Searches](#)
-  [Find Opportunities](#)
-  [Search and Create Sav](#)
-  [Edit My Profile](#)
-  [Change Username/Password](#)
-  [Browse By Agency](#)



Home | Profile | **Worklist** | Create / Review Reports

Tuesday, October 26, 2010 | 9:30 am | Test-11@simplicity.com | Log-in to eSRS | Logo

awardee worklist

My Worklist | Contracts Not Added | Grant Awards Not Added

**Note**

The "Worklist" is an organizational tool for convenience. It allows the prime awardee to organize the awards for which they have reporting responsibility. They can search for and add awards (both contracts and grants awarded to their registered DUNS number) to their work list from contracts reported in FPDS-NG and grants reported through the Agency's FAADS+ submissions to USASpending. They can create new FFATA subaward reports against those prime awards. They can view unassigned prime contracts and/or grants awarded to their registered DUNS number and add them to their worklist. There is no deviation in workflow between managing prime contracts and grants in the Awardee Worklist.

Click on the [Contracts Not Added](#) or [Grants Not Added](#) tab to view any contracts/awards in the system that match your DUNS # and have not been added to your worklist.

Search Filters

Search For And Add Award | Create New Report | Report List | Items 1-3 of 3 | Previous | Jump 1 | Next

Award Number | Top Level Agency | Agency | Type | Options

## CPARS To-Do List

(Select a Contract Number below to complete the action required.)

[Spreadsheet]

Contract Number	Order Number	DUNS	Period of Performance	Action Required	A	
<a href="#">AGRONDL0713</a>		999999999	10/20/2012 - 10/19/2013	Input Comments	11/17/2016	01/16/2017
<a href="#">NMAFA20D0003</a>		999999999	10/01/2015 - 10/01/2016	Input Comments	11/17/2016	01/16/2017

## MY SAM

My User Roles

Entity Users

**Entity Registrations**

Existing Entity Registrations

Register New Entity

BioPreferred Reporting

My Account Settings

My Data Access

General

## What Should Your New Workspace Look Like?

**Notification Feed**

**Saved Searches**

**My Reports**

**My Opportunities**

**My Entities**

**My Contracts**

# Data Entry

- Policy requirements aren't changing
- What should it look like?
  - Entity Registration
  - SCR Reports
  - Bio-Preferred Reports
- How do we help people transition and set expectations?

## Next Steps

- GSA needs industry input as we continue to build beta.SAM.gov
- Holding upcoming focus groups for:
  - o Role Management
  - o Workspace
  - o Entity Registration

# Focus Group Topics

- Mapping your organization
  - How do you work across entities and systems?
  - What roles do you need?
  - What should role management look like for industry?
  - How do you manage system accounts?
- Connecting all user accounts to your entity
- Workspace features that make your jobs easier

# Focus Group Logistics

- 2 hour sessions with potential for follow-up discussions
- Separate groups for small and large businesses in July and August
- Seeking entity administrators and other account holders

# Sign Up

- Complete Sign-Up form on [Interact](#)
- Send questions to [iaeoutreach@gsa.gov](mailto:iaeoutreach@gsa.gov)



# Questions



# Contact Information



## The Integrated Award Environment

GSA Federal Acquisition Service  
1800 F Street, Washington, DC  
Email: [IAEOutreach@gsa.gov](mailto:IAEOutreach@gsa.gov)

To Get Involved:

<https://interact.gsa.gov/group/integrated-award-environment-iae-industry-community>

For Developers to Stay Involved:

<http://gsa.github.io/openIAE>