



## You can manage your users for your entity in SAM



### What is an Entity and How Do I Get Access to My Data?

In SAM, your business/organization is now called an "Entity."

- All the data about your entity currently in the legacy systems (CCR, ORCA, EPLS) will be migrated to SAM.
- To access these migrated records, first create a SAM Account by clicking the "Individual Account" link on the SAM homepage.
- Then, migrate your CCR roles into SAM. When you create a new account, the system will ask you if you want to migrate any legacy roles. Click that link and follow the prompts.
- Migrating your CCR role will automatically give you access to your ORCA data. In SAM, your ORCA and CCR record are combined into one record.



### Becoming an Administrator in SAM

There are several ways to become an administrator in SAM:

- You can migrate your current administrator role in CCR.
- You can request administrator roles using the "Request Roles with New Entity" functionality in SAM.
- Another administrator can assign you administrator roles.
- Each entity can have more than one administrator.
- Entity administrators can edit and update their entity records and can assign and manage other users connected to their entity in SAM.



### Managing Your Users

From your "My SAM" page, access your administrator functionality by clicking "Manage Entity Users" on the left navigation panel

- Manage your current users by clicking "Users List." You can:
  - ✓ View a user's profile information
  - ✓ Give a user additional roles
  - ✓ Remove a user's roles
  - ✓ Unlock a locked user's account
- Invite users to your entity by clicking "Invite User."
- View/delete invitations that you've sent by clicking "Pending Sent Invitations."
- Approve/reject requests for roles with your entity by clicking "Pending Roles Requests."



### Tiered Administrators

As an administrator, you can manage users at lower level entities within your organization's hierarchy.

- SAM uses the Dun & Bradstreet hierarchy for your organization.
- You can manage users at your entity and any entities below you in your hierarchy.

How do I get more information? Take a look at the SAM User Guide.



Go to Our Website: [www.sam.gov](http://www.sam.gov)



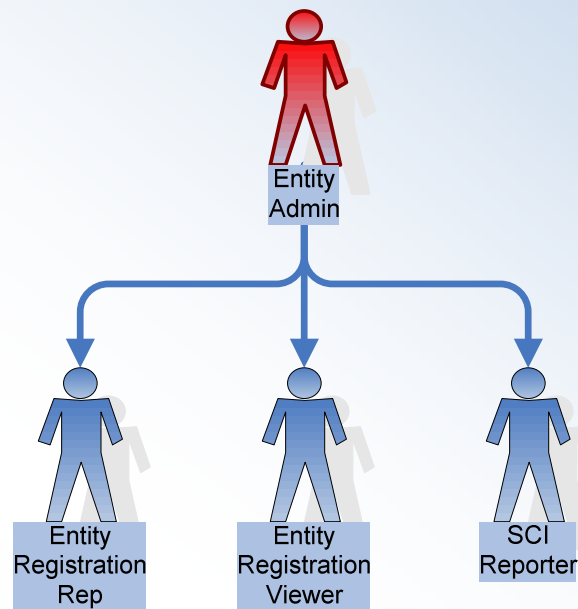
Contact the SAM Help Desk: [www.fsd.gov](http://www.fsd.gov)

## You can manage several roles in SAM

### Phase 1 Non-Federal Roles

As an administrator you have authority over users within your entity.

- The administrator for non-federal entities is at the top of the diagram.
- Administrators can manage roles listed underneath them in the diagram.
  - ✓ You can also manage other administrators.
- There are 4 different non-federal roles in Phase 1.
  - ✓ Entity Administrator
    - Creates and manages an entity's registration (formerly your CCR and ORCA registrations)
    - Manages entity users
    - Formerly "Administrator" in CCR
  - ✓ Entity Registration Representative
    - Edits and maintains an entity's registration
    - Formerly "Maintenance User" in CCR
  - ✓ Entity Registration Viewer
    - Has read-only access to an entity's registration
    - Formerly "View Only User" in CCR
  - ✓ Services Contract Inventory (SCI) Reporter
    - Creates and maintains an entity's SCI reports
    - This functionality will be available in SAM fall 2012
- As the Entity Administrator, you automatically have all the permissions that the lower level users in the diagram have. It is up to you to decide how many people in your entity need roles in SAM to manage your entity information.



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