

# Financial Document Repository: Form 400/Standard Form 1 (SF-1) Reference Guide



## First Time Log In

After receiving an email notification to join the system, use the link provided in the email to create a new account. If you have forgotten which email you used to register contact the Form 400 (Invoices) and SF-1 Administrator at [fdrepository@gpo.gov](mailto:fdrepository@gpo.gov).

## Request New Password

If you have forgotten your password, visit the Login page and click on the "Request new password" link. You can request to have it reset by entering the email address you registered with and click the "E-mail new password" button. The system will automatically send you an email with a link that you can temporarily use to log into the system. Once logged in, you will have the opportunity to modify your user information and change your current system password. If you do not see a reply email, check your spam folder. If you do not receive this email contact the Form 400 (Invoices) and SF-1 Administrator at [fdrepository@gpo.gov](mailto:fdrepository@gpo.gov).

## Adding Profile Data

When you first access your account, the system will require you to provide information about yourself and your agency. This information will only be used to support your use of the system. You will not be able to use any of the system functions until this information is provided.

## Updating Account Information

You can view your current account information by clicking on the "My account" link. This account page will show your member history and alert you to any recent activity on your account. If you see any unusual activity, report this to the Form 400 (Invoices) and SF-1 Administrator at [fdrepository@gpo.gov](mailto:fdrepository@gpo.gov)

Using the "Edit" tab, you can change your email, current password, and profile information.

To modify your password, enter your old password, then enter the new password, and confirm the new password. The password must be eight characters in length and must contain at least one lowercase, one uppercase, and one number or special character. Following password requirements the system will advise of password strength.

To modify your email address, enter the new email address in the box provided. The system will send an email to the address currently on file. You must open this confirmatory email and follow the link before your new email address is activated.

## View Documents

To view your documents, click on the "Form 400/SF-1" link at the top and select "View Documents". The document search screen will appear. You are required to select a Billing Address Code (BAC) and Document Type to view.

Form 400 documents are available in the system starting from August 2012. SF-1 documents are available in the system for orders awarded from March 2015.

The additional fields are optional but assist in narrowing down the search. These fields support wildcard matching using the asterisk, "\*", character. This character can be used anywhere within a search field. Searching "123\*5", for example, will match "12345" or "1234465". Additional details on the search fields are available via the Search Tips link on the left.

Clicking the "Search" button will then execute the search and display all matching documents. The system will only return the first 250 documents that match the given criteria. You will need to refine your search criteria to reduce the number of matches returned.

## Agency Administrator Role Functions

### View Access Rights

All access rights in the Financial Document Repository are based on BACs. First, click on the "Form 400/SF-1" link at the top and select "View Documents". Click on the "Access" tab above the search fields.

This Access page has the following tabs:

- List: Provides a list of all users assigned to a particular BAC, their access rights, and allows the Agency Administrator the ability to revoke rights from a user.
- Batch Add Rights: Provides the ability for the Agency Administrator to grant View Only access to multiple BACs for multiple email addresses.
- Invite User: Provides the ability for the Agency Administrator to grant View Only access to a specific BAC by entering the user's email address.
- Invitations: Provides a list of email addresses of users that were invited to access a BAC but did not register on the site.
- Delegation Log: Provides the history of invitations for a BAC.

For each of these tabs, you must first select a BAC for which you have administrator access.

## List

This page will allow you to view the list of users with access to a specific BAC. Users with “View Only” access can only view documents. Users with “Administrator Access” can view and modify access rights to the BAC.

You can sort the list of users by clicking on “Access.” If you have the rights to modify a user’s access level, you will see a “Revoke” option on the right side of the row. Clicking this link will remove users access to the BAC but will not delete the account from the system.

## Batch Add Rights

This page will allow you to invite multiple users to have access to a multiple BACs. Select BACs from the Available BACs list and click the >> button to add them to the Target BACs list. Enter the email addresses of the people you would like to grant “View Only” access. Multiple e-mail addresses can be added, one per line, to give access to multiple users. Click the “Add” button. An error is generated if the user already has access to the BAC. Once you click the “Add” button, the system will check to see if the user already has an account. If an account is already established for user, the system will notify them, via email, and automatically add their information to the specific BAC. If they do not already have an account , the system will send them a notification asking them to register with the site.

## Invite User

This page will allow you to invite new users to have access to a specific BAC. Enter the email address of the person you would like to grant “View Only” access and click the “Invite” button. An error is generated if the user already has access to the BAC. Once you click the “Invite” button, the system will check to see if the user already has an account. If an account is already established for user, the system will notify them, via email, and automatically add their information to the specific BAC. If they do not already have an account, the system will send them a notification asking them to register with the site.

All system invitations expire after 30 days if the user does not register.

## Invitations

After inviting users to specific BACs the invitation will appear under the “Invitations” tab. Invitations will remain until either the invitation expires, the user registers on the website, or the invitation is revoked by the Agency Administrator.

## Delegation Logs

This screen provides a history of all user actions performed against the selected BAC. All invitations, invitation revocations, rights assignments, and rights revocations will be shown on this screen identifying the action. This screen also provide details of actions taken and who initiated the action. If you see any unusual activity in this tab, please notify the Form 400 (Invoices) and SF-1 Administrator at [fdrepository@gpo.gov](mailto:fdrepository@gpo.gov).