



SecureForms Supplier User/Admin Guide

March 2024



Contents

Document Versioning	2
Document Overview	3
SecureForms Summary	3
Exostar’s Managed Access Gateway (MAG)	3
MAG Account Information.....	3
Accessing RTX SecureForms.....	4
SecureForms Roles, Permissions and Responsibilities.....	5
Login.....	5
Manage User Roles	6
Dashboard.....	8
Banner Messages.....	10
Forms	11
How to Edit and Submit an Assigned Form.....	11
Business Activity and Type Definitions	13
Reassign an Assigned Form.....	17
Renew an Assigned Form.....	18
Viewing Form Details	19
Assignment History	19
Revision History	19
Printing Forms.....	20

[Document Versioning](#)

Version	Change Overview	Date
2.0	Documentation Update	12/05/2018
2.0	SecureForms Refresh	09/24/2018
2.0	MAG 7.0	February 2021
	MyExostar Migration	September 2022
	RTX Rebranding	January 2024

[Document Overview](#)

This role-based user guide outlines various functionalities and actions for Supplier Users and Administrators in SecureForms. This document discusses:

- SecureForms Access
- Roles, Permissions, and Responsibilities
- How to Edit and Submit an Assigned Form
- Reassign an Assigned Form
- Renew an Assigned Form
- Viewing Details of Form Assignment
- Viewing and Printing Submitted Forms
- Manage User Roles of Users in Supplier Org (Admin)

[SecureForms Summary](#)

SecureForms focuses on providing RTX the ability to invite suppliers to complete forms electronically, which then become available to everyone at RTX. The system also ensures suppliers cannot submit the form until all required forms are completed. It contains built-in data collection processes and workflows, automated features and services that allow Buyers (RTX Users) to continuously review and make future decisions on supplier relationships.

[Exostar's Managed Access Gateway \(MAG\)](#)

Exostar's Managed Access Gateway (MAG) is a consolidated portal providing identity and access management as a cloud service for the Aerospace & Defense industries. RTX Secure Forms is accessed through MAG.

You are required to have a MAG user account and an approved security credential to access RTX Secure Forms.

Please see the [Accessing RTX SecureForms](#) section in this guide for access instructions and SecureForms credential requirements.

[MAG Account Information](#)

If you do not have a MAG user ID, please work with your organization's MAG Organization Administrator. If you have accessed your MAG account and the status of RTX SecureForms is pending Application Administrator approval, please work with your organization's SecureForms Application Administrator.

If you do not know who the SecureForms Application Administrator is for your organization, follow the instructions below:

1. After logging into MAG, click the **My Account** tab.

2. Click **View Organization Details**.
3. From the **Organization Details** page, scroll to the **Application Administrators** section.
4. Locate Application Administrator(s) for SecureForms (SecureForms displays in the Application column).

You can also contact Exostar directly to inquire who the administrator is. If there is no administrator, contact your organization's Organization Administrator (Organization Administrator displays from View Organization Details page).

If your organization does not have an Organization Administrator or if the Organization Administrator is no longer with your company, please complete the instructions outlined via https://www.myexostar.com/?ht_kb=mag-organization-administrator#change-admin-change-authorization.

If your organization does not have an Exostar MAG account, you must be invited by RTX to access SecureForms. The invitation is sent via email and must be completed by the point of contact designated by RTX. For assistance with completing organization account registration, please visit the [SecureForms Get Started](#) page.

[Accessing RTX SecureForms](#)

To access RTX SecureForms, log into your MAG account with an approved multi-factor credential such as a Phone-based OTP with Proofing Upgrade. If you also work with other Exostar partners such as Boeing or Lockheed, please review the information on the [MAG Credentials](#) page to determine what type of credential you need.

1. Log into [MAG](#) with your Email Address/User ID and Password.
2. Locate the **RTX SecureForms** tile from listed applications found on the **Home** tab. Click **Launch** to input your OTP code. You are redirected to RTX SecureForms.

NOTE: If a different application status displays other than Launch, please refer to the MAG application status matrix [here](#).

[SecureForms Roles, Permissions and Responsibilities](#)

Suppliers have two different roles in SecureForms. Each role has both common and specific functions in the application.

Supplier Users can execute the following functions:

- View any forms assigned to them
- Reassign forms assigned to them to other supplier users
- Edit forms assigned to them
- Submit forms assigned to them
- Download, save, and print forms assigned to them

Supplier Administrators can conduct the same functionalities as above in addition to:

- Manage Users
- View all forms assigned to their Organization
- View any current form in org that are currently in progress
- Assign any forms assigned in organization to any supplier users

[Login](#)

Previously, suppliers accessed SecureForms via the RTX Supplier Portal. Any attempt to open SecureForms in the portal now prompts a pop-up message stating, “SecureForms has been upgraded and is now available from your Exostar account homepage.”

If you have access to other RTX applications in MAG, the same MAG login process to now applies to SecureForms.

Follow the steps below to log into MAG and access RTX SecureForms:

1. Go to <https://portalvs.exostar.com> and sign in with your 2FA credential.
2. Under the **My Applications tab**, locate **RTX SecureForms**. Click **Launch**.

- Each time a user logs into SecureForms, or if their current session times out, they must accept the **Export Control Acknowledgement**. Check the box and click **Accept**.

Export Control Acknowledgement

I understand that this application is accessible by both U.S. and Non-U.S Persons. I agree not to post Export Controlled Technical Information to this Application.

Manage User Roles

Supplier Administrators have the ability to modify roles of any users in their organization. Follow the steps below to make changes to users on your organization:

- From the **Dashboard**, click the **X User** icon on the bottom right side of the screen.

Attention Suppliers: "Raytheon SecureForms 2.0 will be available in May 2018. Tips: Do not use Back browser button, click Exit or Home instead. System... [View More..](#)

Pending Forms | Completed Forms | Cancelled Forms

CR-003
Request No: VX56QORB

Initiated Date	05/16/2018	Status	New	Revision	7.1
Due Date	06/30/2018	Status Date	05/16/2018	Form Progress	100%
Assigned To	Rick Maier	Reassigned	Yes	Request Status	70%

My Organization

NEW ENGLAND ETCHING CO INC

ESD# 0010030229
EXOID 103467535
MPID
DUNS 001113281
Global DUNS 001113281
Location
23 SPRING ST,
HOLYOKE, MA, 01040-5708,
US.

3 USERS

Communication

Q Test Question - Capstone Testing - NE ETCHING

Test Question - Capstone Testing - NEW ENGLAND ETCHING Communication Board

Created 04/20/2018 Last updated 04/20/2018 Replies 1

[Reply](#)

2. On the **Organization Profile** screen, locate the user and click **Manage**.

The screenshot shows the 'Organization Profile' page for 'QA_Raytheon_Org_Test_A_107'. It displays company details such as ESD Number (EX018012032), DUNS Number (18012026), Global DUNS Number (GGDNS12018), Exostar ID (119768046), Address (2325 Dulles Corner Boulevard), City (Herndon), State/Province (VA), Country (USA), and Postal Code (20171). Below this is a 'User' tab with a table listing users. The 'Eric Walker' row has a red box around its 'Manage' button.

Name	User ID	Email	Role	Provisioned	Date Updated	
Salima Usman	usmans_4363@fis.evincibletest.com	salima.usman@exostar.com	Supplier Administrator	03/02/2018	03/02/2018	Manage
Eric Walker	walkere_7121@fis.evincibletest.com	eric.walker@exostar.com	Supplier Administrator	03/02/2018	03/02/2018	Manage
Sanjay Dabhi	dabhis_7801@fis.evincibletest.com	sanjay.dabhi@exostar.com	Supplier User	02/02/2018	02/26/2018	Manage

NOTE: Your company information (name, address, etc.) on the CR-003 is pre-populated from one or more databases which are not automatically updated from the completed form. If changes need to be made in our Vendor Master, request the buyer you work with submit a Change Request for the Enterprise Supplier Data Management (ESDM) application.

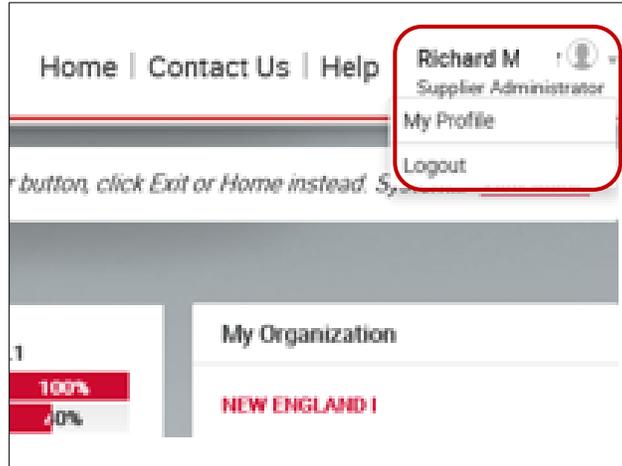
3. The **Role Management** screen displays. From this screen, Supplier Administrators can make the following changes:
- a. Update User Roles
 - b. Activate/Deactivate User Status

The 'Role Management' dialog box has two sections: 'User roles' with radio buttons for 'Supplier User' and 'Supplier Administrator' (selected), and 'User Status' with a checked checkbox for 'Active'. 'Close' and 'Update' buttons are at the bottom.

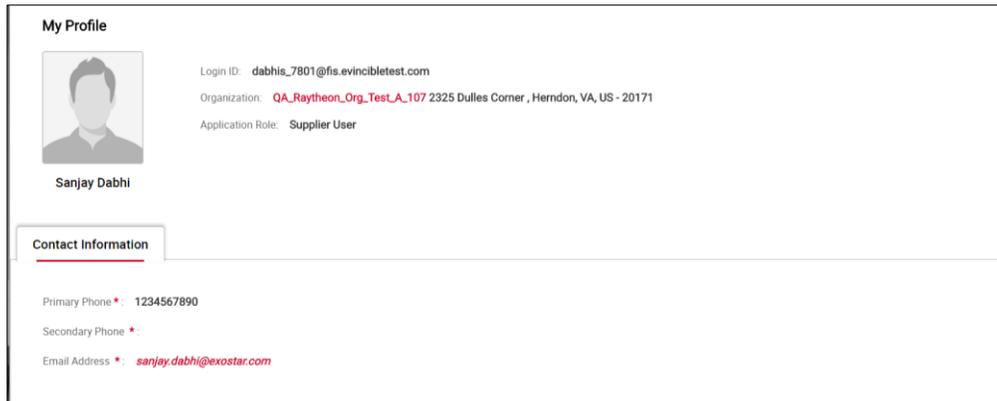
NOTE: If a user is deactivated in SecureForms, they are not deactivated in Exostar’s MAG. To remove a user from MAG, contact the MAG organization’s Organization or Application Administrator.

Dashboard

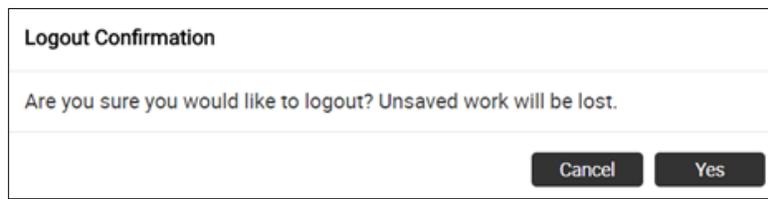
Users can conduct various administrative and functional tasks from the Dashboard. On the top right of the page, the system displays the user's **Name** and **Role**. Click the **User Icon** to display a dropdown containing different pages to view.



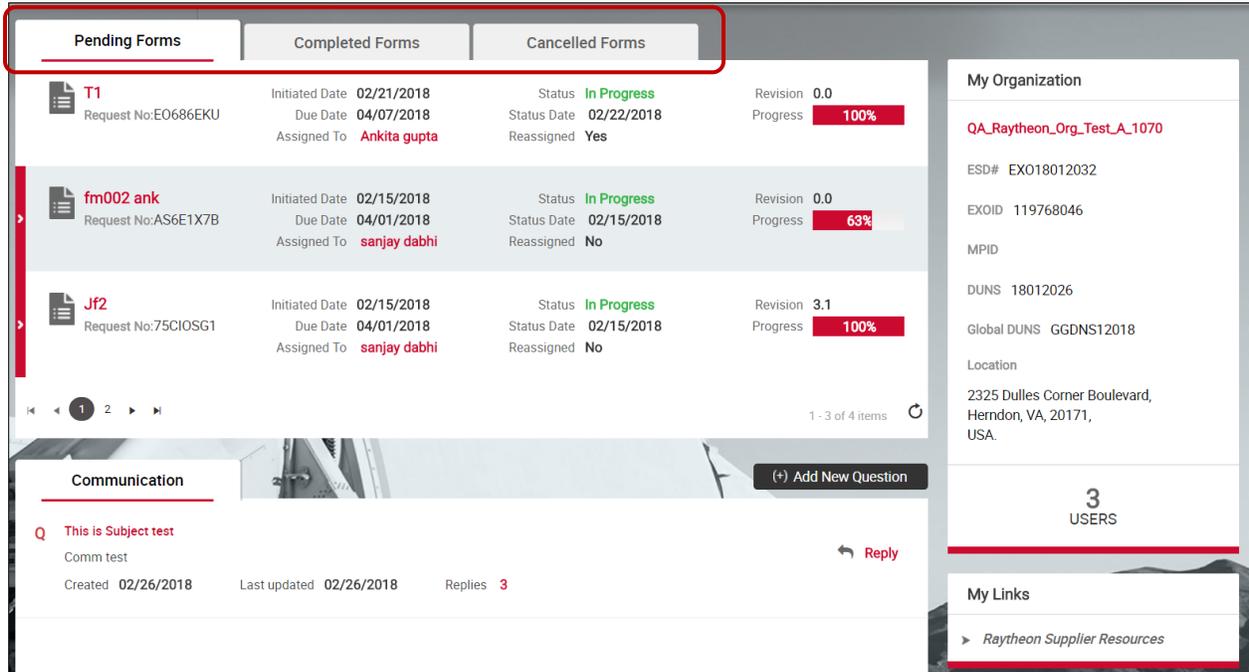
My Profile displays the Login ID, Organization Name, Application role, and user's Contact Information.



The **Logout** prompts a popup **Logout Confirmation** screen. Click **Yes** to end your session or **Cancel** to resume.



The body of the dashboard contains queues (tabs) with form requests in various workflow statuses. The tabs are listed as follows:



- **Pending:** Form requests sent by RTX to an assigned supplier user, but not yet completed by the supplier.
- **Completed:** Forms completed by suppliers and submitted to RTX.
- **Cancelled:** Forms sent to suppliers and later cancelled by RTX.
- **PIM Forms:** If the supplier user has a Partner Information Manager (PIM) account and has forms requested by RTX, those forms are viewable in SecureForms.

NOTE: PIM forms are not editable in SecureForms. Users are redirected to PIM if any modifications need to be made to PIM forms.

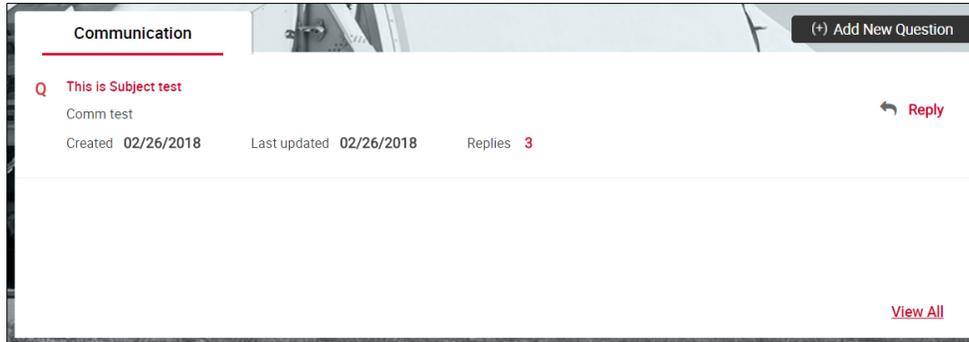
The **My Organization** section contains supplier account details.

My Organization
QA_Raytheon_Org_Test_A_1070
ESD# EX018012032
EXOID 119768046
MPID
DUNS 18012026
Global DUNS GGDNS12018
Location
2325 Dulles Corner Boulevard, Herndon, VA, 20171, USA.

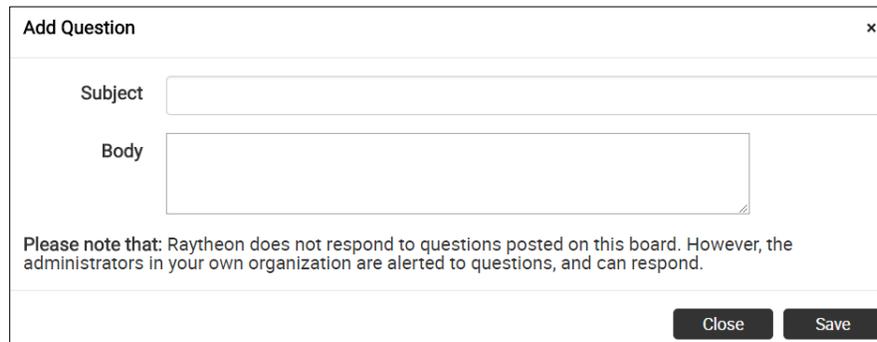
The **My Links** sections contains a link for **RTX Supplier Resources** that sends users to a RTX resource page dedicated to their Suppliers.



The primary purpose of the **Communication Board** is to allow supplier users to ask supplier administrators questions within SecureForms.



To post on the **Communication** board, click the **Add New Question** button. You are prompted to enter your question in a pop-up box. Once you enter the **Subject** and **Body** of your message, click **Save**.



NOTE: Supplier Administrators can see all posted questions/messages added by any users in their organization. **Supplier Users** can only see messages they posted. RTX is unable to respond to the messages on the Communications Board.

Banner Messages

Banner Messages contain information that needs to be communicated to suppliers by RTX. They are located at the top of supplier pages as shown below.



NOTE: Click **View More** to expand the message when there is more text than the system displays in the consolidated view.

Announcement ✕

🔊 **Attention Suppliers:** " Raytheon SecureForms 2.0 will be available in May 2018. Tips: Do not use Back browser button, click Exit or Home instead. System will timeout if inactive for ~15 minutes. "

Close

Forms

SecureForms houses different forms created and assigned to suppliers by RTX. This section of the User Guide outlines how Suppliers view, edit, and respond to forms.

How to Edit and Submit an Assigned Form

To edit and submit an assigned form, follow the steps below:

1. From the Supplier Dashboard, click the **form name** from the **Form List** page

Pending Forms	Completed Forms	Cancelled Forms
<div style="border: 1px solid red; padding: 2px; display: inline-block; color: red; font-weight: bold;">CR-003</div> Request No: IERX3DXB	Initiated Date 05/16/2018 Due Date 06/30/2018 Assigned To Matthew Crater	Status New Status Date 05/16/2018 Reassigned No
		Revision 0.0 Form Progress 0% Request Status 40%

NOTE: The **Form Progress** bar indicates the percent of progress in populating the form. The **Request Status** bar indicates the percent of progress in completing the request. (A request begins when one to complete a form is submitted and ends when the form is submitted).

2. On the **Form Details** screen, click the **Edit** icon on the bottom right side of the screen.

Form Details TestTemp3 (TestTemp3.exe info)

Recent Request

Request No : RLRHNB57	Request Date : 02/28/2018	Status Date : 02/28/2018
Request Type : Assign (Renew)	Date Assigned : 03/01/2018	Date Due : 04/14/2018
Current Status : In Progress	Assigned To : Sanjay Dabhi	Requester's Name : Shivani Chadha
Latest Revision : -	Requester's Email : shivani.chadha@exostar.com	
Expires on : 04/24/2018		

Downloads

Empty Forms : Download

Latest Submitted Revision 1.0 : Download View

Assignment History

User	Date Assigned
Sanjay Dabhi	03/01/2018
Ankita gupta	02/28/2018

Revision History

Revision	Type	Date	Download
1.2	Draft	03/01/2018	
1.0	Submitted	02/28/2018	

Edit

Exit

- From the **Edit Form** screen, make the desired updates. Once you complete your modifications, click the **Submit Form** button to send your form to RTX.

- Clicking the **paper icon** in the top right corner will open a list of sections that can be navigated to without scrolling through every screen.

Business Activity and Type Definitions

Question A.1. Part III (h) asks that you identify the Business Activity of your organization.

(h) **Offeror's Business Activity** (See Definitions):

- Rentals
- Royalties
- Consultant / Professional Fees
- Medical / Health Care
- Services Only

For the purposes of this form, business activities are defined as the following:

- **Rentals:** Real Estate rentals, machine rentals
- **Royalties:** Intangible property such as patents, copyrights, trade names and trademarks
- **Consultant/professional fees:** Fees to accountants, architects, contractors, engineers, referral fees or payment for services
- **Medical/Healthcare:** Physician or other supplier or provider of medical or healthcare service
- **Services Only:** Rentals, calibration, integration, counterfeit screening, repairs, et cetera

Question A.1. Part III (i) asks that you identify the Business Type of your organization.

(h) **Supplier's business type** (check only ONE) (See the User and Administrator Guide for Definitions):

- Construction
- Consultant
- Service
- Software
- Testing
- Manufacturer Only
- Manufacturer / Authorized Distributor
- Manufacturer / Non-Franchised Distributor
- Non-Franchised Distributor Only
- Authorized / Franchised Distributor Only
- Both Authorized / Franchised & Non-Franchised Distributor

- **Manufacturer/Authorized Distributor:** Companies that design parts and products, hold intellectual property rights, manufacture (or consigns manufacturing), and may authorize or license the sale of the product to other companies. These companies are also referred to as Original Manufacturer (OM), Original Component Manufacturer IOCM), or Original Equipment Manufacturer (OEM), and are an authorized distributor for parts they manufacture.
- **Manufacturer/Non-Franchised Distributor** - Companies that design parts and products, hold intellectual property rights, manufacture (or consigns manufacturing), and may

authorize or license the sale of the product to other companies. They are an authorized distributor for parts they manufacture. These companies also function as a non-franchised distributor for other parts and/or products.

- **Non-Franchised Distributor Only:** A Supplier who is not authorized or under the oversight of the part's OM. These companies typically do not offer an item with the full manufacturer's warranty. These companies are also referred to as Independent Distributors, Non-Authorized Distributors, Non-Authorized Suppliers, or Brokers.
- **Authorized/Franchised Distributor Only:** A distributor with which the OM has a contractual agreement to stock, repackage, sell and distribute its product lines. Authorized companies are also referred to as Authorized Suppliers. AN AUTHORIZED DISTRIBUTOR DOES **NOT** SELL AND DISTRIBUTE PARTS THAT THEY ARE **NOT** AN AUTHORIZED SUPPLIER FOR.
- **Both Authorized/Franchised and Non-Franchised Distributor:** A Distributor that sells and distributes parts for which they are a franchised distributor/authorized supplier, and also sells and distributes parts for which they are NOT a franchised distributor or authorized supplier.
- **Consultant:** A person, partnership, association, or company retained by RTX (the "Company") for specialized skills, experience, abilities, and provide either (a) advisory services (counsel or recommendations) to enhance business development, technical, financial, management or other capabilities that can contribute authoritatively to the internal RTX enhancements of RTX business solutions.
- **Service:** A supplier that provides a service to RTX. (example: Rentals, Calibration, Integration, Counterfeit screening, Repairs, etc).
- **Software:** A supplier that provides Software or Software services for RTX.
- **Construction:** A supplier that has activities associated with buildings, structures or other types of real property such as land, roads and or parking lots.
- **Testing:** A supplier that provides Testing Services to RTX.

All suppliers that certify as Small in A.1. Part III(j) must also provide information in Question A.3.1. as follows:

- (1) Which size standard defined by the Small Business Administration (SBA) applies based on their Number of employees and Annual Revenue (in millions)
- (2) All NAICS codes for which the supplier represents itself as a small business concern.

- To aid in identifying the most common NAICS cods that RTX procures for, review the tool located [here](#).

Edit Form 🔗

PROGRESS: 100 %
100%

B.21. DFARS 252.225-7050 (OC... Section C: Authorized Signature of Offeror

Save & Exit **Submit Form** **View Answers** **Previous** **Next**

Note: The Internal Revenue Service does not require Offeror's consent to any provision of this document other than the certifications in Section A.1 Parts I and II.

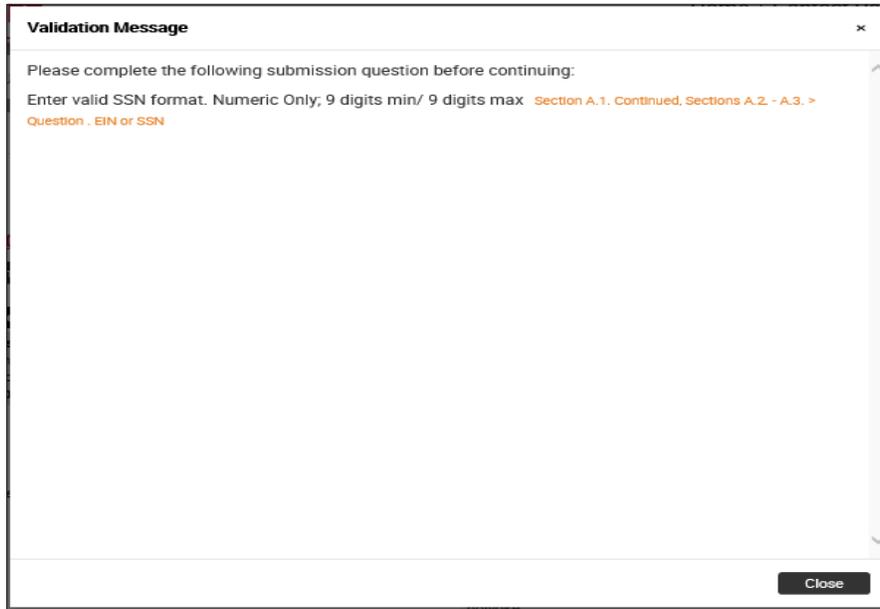
Certification of Offeror or Offeror's Authorized Representative:
By submitting this information, I am attesting to the accuracy of the information contained herein. I understand that I may be subject to penalties imposed by the United States Government if I misrepresent any of the representations or certifications herein. **Offeror** further acknowledges that Raytheon shall rely on the information provided by **Offeror** herein and that if any of **Offeror's** representations herein change during the period of performance, **Offeror** shall provide immediate written notice to the Raytheon representative to whom this document was originally provided.

<input type="text" value="meier_r_9186@securepass.exo"/> Signature of Offeror or Offeror's Authorized Representative	<input type="text" value="NE Etching"/> Offeror Firm/Company Name
<input type="text" value="Richard"/> First Name of Above Signatory	Address : <input type="text" value="Test Division #2"/> <input type="text" value="20 anywhere avenue"/> <input type="text" value="holyoke"/> <input type="text" value="hampden"/> <input type="text" value="massachusetts"/>
<input type="text" value="Maier"/> Last Name of Above Signatory	<input type="text" value="us"/> <input type="text" value="09990-7777"/>
<input type="text" value="Chief tester"/> Printed Title of Above Signatory	Telephone : <input type="text" value="111-111-1111"/> Facsimile : <input type="text"/> Email : <input type="text" value="richard_maier@raytheon.com"/>
Date: <input type="text" value="05/15/2018"/> 📅	

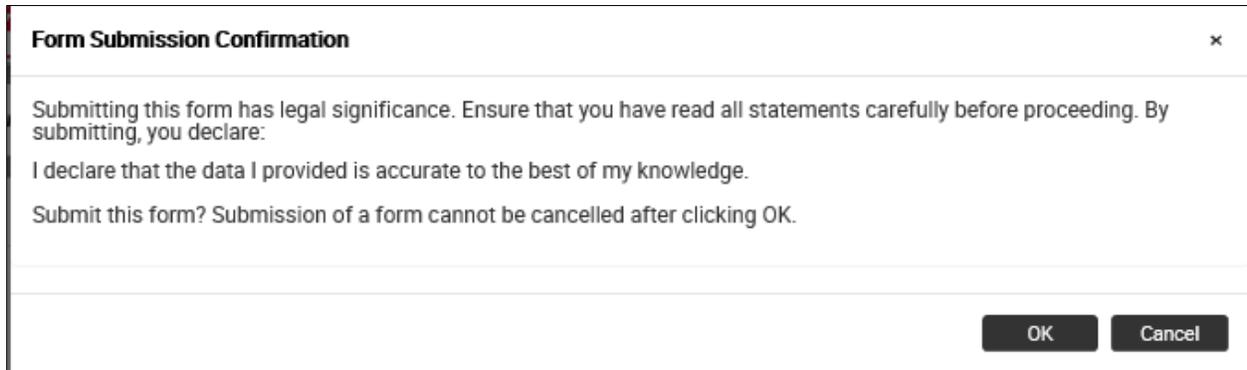
Save & Exit **Submit Form** **View Answers** **Previous** **Next**

The information in Section C is prepopulated and cannot be edited here. The Signature and Signatory names are those of the person who logged in and cannot be changed. The company name, address and emails can be edited in Section A.1. Part I. and will then be reflected here.

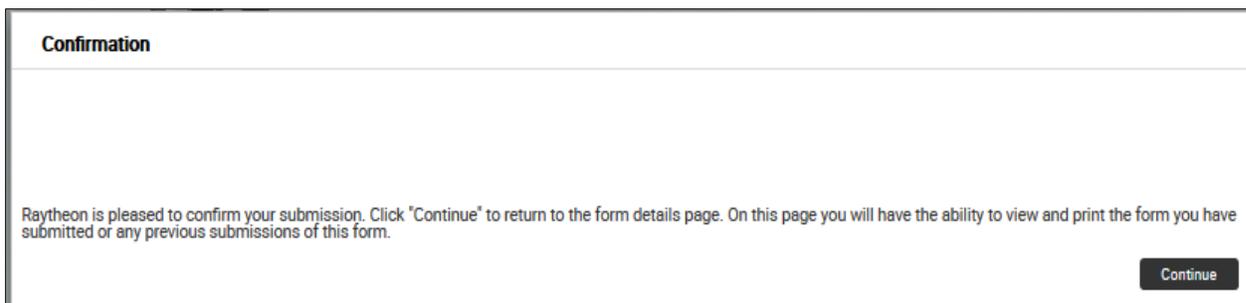
A list of any required incomplete fields will open and clicking the link will navigate directly to those that need to be filled out.



- 5. Once all required fields are complete, click **Submit Form**. On the **Form Submission Confirmation** pop-up, confirm the form should be submitted.



- 6. After clicking **OK**, a further confirmation displays and the person that signed the form receives an email as well.



NOTE: If you are not ready to submit your form and would like to save it in its current state, click the **Save & Exit** button.

Reassign an Assigned Form

Supplier Users can assign any form assigned to them, to any other user in their supplier organization. Supplier Administrators can reassign any form assigned to the organization, to any user of the organization.

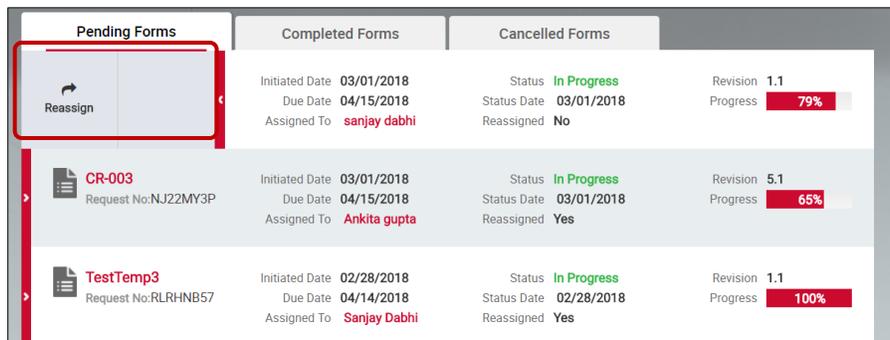
In order to reassign the form to a user that does not already have access to SecureForms for that organization, the Supplier Administrator must first invite them to SecureForms. If the user does not have an Exostar MAG account, this can be done from the **Administration** tab by clicking **Add New User** and following the prompts to invite the person to activate an account in SecureForms and any other application they need access to.

If the user has a MAG account, they can click **Request Access** to SecureForms, and wait for the administrator to approve the request and then reassign the form to them.

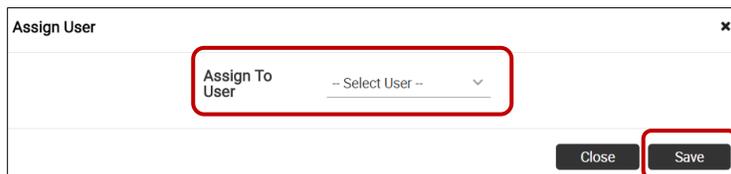
It is not possible for multiple users to have accounts with the same email address under the same organization. For example, John Smith and Beth Jones cannot have accounts, both of which use the email address sales@acmecorp.com. The preference is accounts should be set up under a person's email address instead of a 'generic' one such as Sales or Customer Service.

To Reassign an Assigned Form:

1. From the Form Dashboard, go to the **Pending Forms** tab. Click the white arrow next to the form name to expand options. Click **Reassign**.



2. The **Assign to User** dropdown displays. Select the user and click **Save**.



- The new assigned user receives an email notification advising they were assigned a form in SecureForms.

NOTE: Forms can also be reassigned from the **Form Details** page. Click the **Reassign** button and follow step two above.

Renew an Assigned Form

A supplier user can renew a form assigned to them when there are no other active or pending requests for the form, and a completed version of the form already exists. If these conditions are not met, the **Renew** link does not display.

- From the Form Dashboard, go to the **Completed Forms** tab. Click the white arrow next to the form name to expand options. Click **Renew**.



- A request for the form to be **Renewed** is created and placed on the **Pending Forms** tab.



NOTE: The **Form Progress** bar indicates the progress in populating the form as a percentage of the number of questions that have been answered. The **Request Status** bar indicates the percent of the Request that has been completed. Requests begin when a user is assigned to complete a form and end when the form is submitted.

Upon renewal, because the form is pre-populated from the previous submission, Form Progress may be 100% (all questions have been answered) but Request Status can be 80% (form completed but not submitted). An exception to Form Progress during renewal may exist if questions were added since the last time a form was submitted and therefore cannot be pre-populated.

When the renewal process is initiated either by the supplier or by a RTX user, the Form Progress will show 100% due to the fact that the form prepopulates with answers from the previous submission.

- Changes can be made as needed and then the form can be submitted by following the steps above.

Viewing Form Details

The Form Details page displays supplier attributes, form details, and allows Supplier Users to print the latest submission and all previously completed submissions (Administrator Only) of the form they are viewing.

Form Details CR-003 (This is test of CR-003)

Recent Request

Request No : NJ22MY3P	Request Date : 03/01/2018	
Request Type : Assign (Renew)	Status Date : 03/01/2018	
Current Status : In Progress	Date Assigned : 02/06/2018	
Assigned To : Ankita gupta	Date Due : 04/15/2018	
Latest Revision : -	Requester's Name : Shivani Chadha	
Expires on : 03/01/2019	Requester's Email : shivani.chadha@exostar.com	

Downloads

Empty Forms : Download

Latest Submitted Revision : 5.0 View

Assignment History

User	Date Assigned
Ankita gupta	03/01/2018
Ankita gupta	03/01/2018
Shanil Shah	02/06/2018
Ankita Gupta	02/06/2018

1 - 4 of 4 items

Revision History

Revision	Type	Date	Download
5.1	Draft	03/01/2018	
5.0	Submitted	03/01/2018	
4.0	Submitted	03/01/2018	
3.0	Submitted	02/06/2018	
2.0	Submitted	02/06/2018	

1 - 5 of 6 items

Assignment History

The Assignment History table outlines user information and dates for each instance the form was assigned or reassigned to a specific supplier user.

Revision History

The Revision History outlines the following information for each form request of the particular form previously sent to RTX by the supplier (**User/Administrator**) or organization (**Administrator**):

- Revision Number
- Type
- Date

Printing Forms

Supplier Users can only see and download completed (i.e. submitted) forms and forms they saved in draft state. Supplier Administrators can see all versions of any form assigned to their organization in any state.

To Print Last Submitted Form:

1. Go to the **Download** portion of the **Form Details** screen and click the **PDF icon** next to **Latest Submitted Revision**.
2. To view and print any other previously completed or draft forms, go to the **Revision** column of the **Revision History** table, and click the **PDF** icon next to any form that meets the criteria.