



Onboarding Module (OBM) Buyer Guide April 2024

EXOSTAR[®]



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DOCUMENT VERSIONS

Version	Change Overview	Date
1	Formatting Updates	March 2024
2	Content Additions	April 2024

ONBOARDING MODULE (OBM) OVERVIEW

The Onboarding Module (OBM) focuses on providing the ability to manage vetting and certification of prospective and existing suppliers. It contains built-in data collection processes and workflows, automated features, and services that allow users to continuously review and make future decisions on supplier relationships.

ACCESS

To access OBM, you must have an Exostar's Managed Access Gateway (MAG) account, as well as an acceptable security credential. For help resetting your MAG password or any other MAG-related questions, refer to https://www.myexostar.com/?ht_kb=mag.

NOTE: If you are the first user in your organization to access OBM, you must accept the standard MAG Usage Service Agreement. If you see **Agree to Terms** on the **Onboarding Module** tile in your MAG account, click the button and accept the service agreement.

Once you successfully activate your MAG account, all subsequent logins proceed as follows:

1. Navigate to <https://portal.exostar.com>. Input your **Email Address** or **User ID**. Click **Next**.

Step 1/2: Email Address / User ID

Login

Enter your Email Address or User ID

Email Address or User ID

[Login Using Company Credential \(EAG\) ?](#) [NEXT](#)

[Login Using Badge or Certificate ?](#)

[Need help?](#)

Don't have an account? [Register](#)

Unauthorized access to this system may constitute a criminal offense.

2. Input your **Password**. Click **Next** to access the MAG Dashboard.

Step 2/2: Password

Password

Your email address displays here

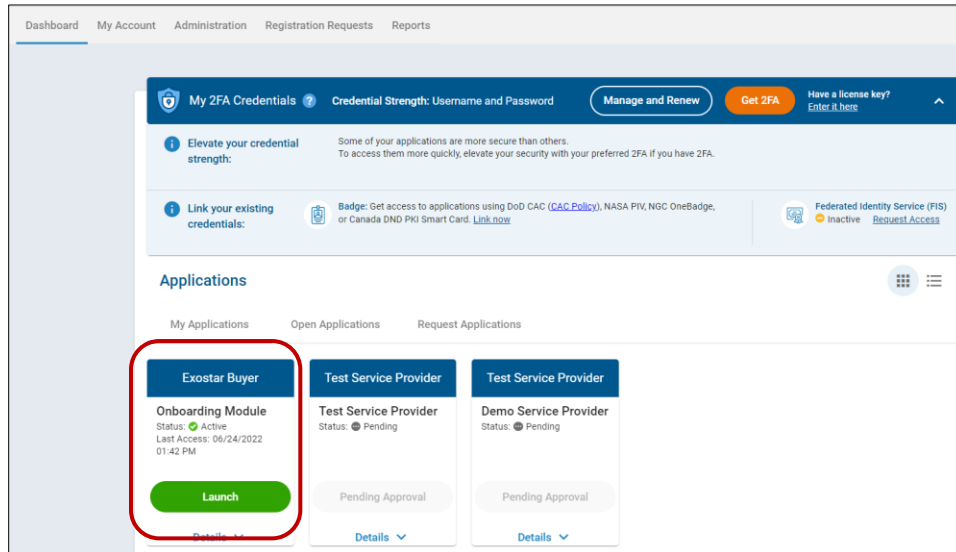
Enter your Password

Password

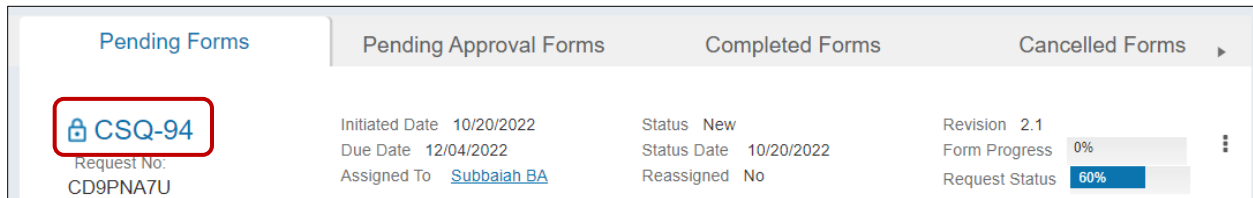
[Use a different Email or User ID](#) [NEXT](#)

[Forgot Password?](#)

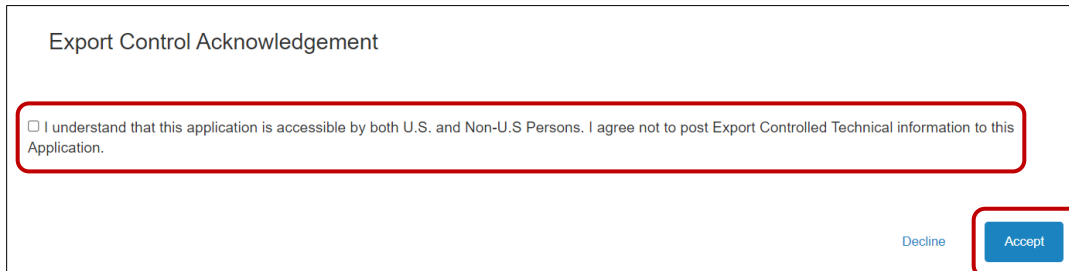
- From the **My Applications** section, click the **Launch** button from the **Onboarding Module** tile.



IMPORTANT: At this point in the process, the system may prompt for your security credential. The Buyer Organization determines the credential type required to access the OBM application and 2FA enabled forms. Please reach out to the Buyer for more information on the credential type. A 2FA enabled form will be represented with a lock, shown below.



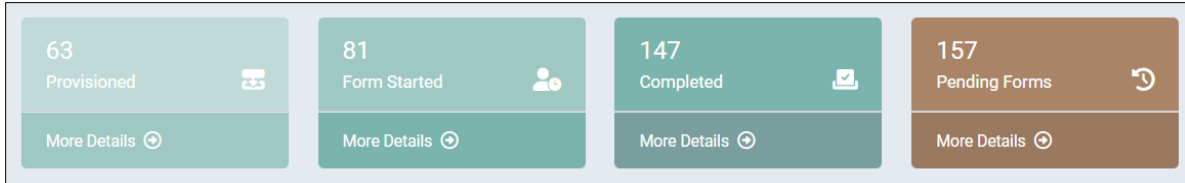
- Once you successfully login with your security credential, the system displays the **Export Control Acknowledgement**. Place a checkmark next to **I understand that this application is accessible by both U.S. and Non-U.S. Persons. I agree not to post Export Controlled Technical Information to this application.** Click **Accept**.



Once you acknowledge the notice, the OBM dashboard displays.

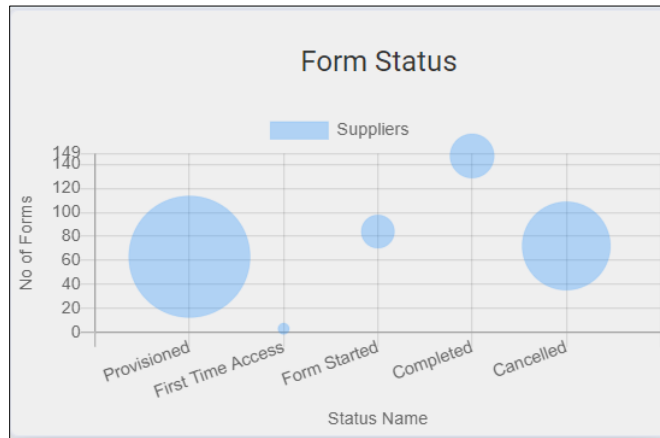
OBM BUYER DASHBOARD

Depending on your role, the dashboard displays different management options. The four tiles, located under the top header, provide a Form Status snapshot with an option to view additional details.



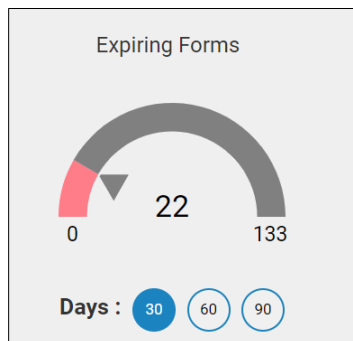
Form Status

This section provides a graph depicting the number of forms/suppliers per status. Hover over each circle to view the exact number.



Expiring Forms

This section provides a number of expiring forms, as well as radio buttons for 30 days, 60 days and 90 days.



Supplier Scores

A Buyer Admin can view detailed Supplier Scores for NIST and Cybersecurity Compliance and Risk Assessment (CCRA) Questionnaires. To complete a Supplier search and view scores:

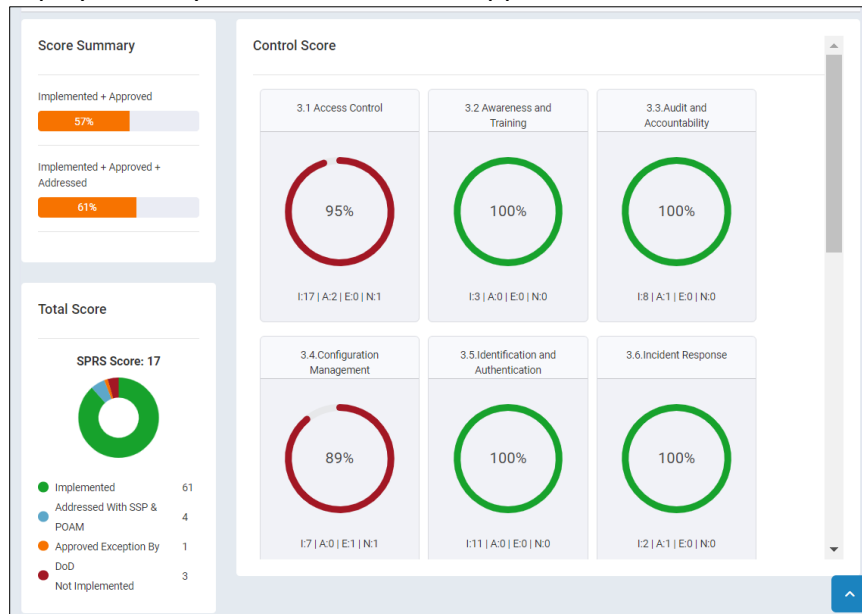
1. Input the **Exostar ID** or **Supplier Name** in the **Supplier Name** field. The corresponding forms will populate in the Form list dropdown.

NOTE: The **Form List** is grayed out until you input a valid Supplier.

2. Select the desired form from the **Form List** drop-down to display the **Supplier Scores**.

NIST Supplier Score View

The following displays when you select to view a Supplier's NIST Score:





Cybersecurity Compliance and Risk Assessment (CCRA) Questionnaire View

The following displays when you select to view a Cybersecurity Compliance and Risk Assessment (CCRA) Questionnaire Score:

Compliance	
Compliance with 48 CFR 52.204-21	Compliant
Compliance with DFARS 252.204-7012	Compliant
Compliance with DFARS 252.204-7020	Compliant
CMMC Certification Level	Not applicable

Risk	
Cyber Risk Rating	● Yellow
Risk of FCI-only suppliers	Not Applicable

My Reports

This section is automatically collapsed. Select the plus sign (+) to open a view of all the reports you created and added to your dashboard. It is important to note, only ten reports can display on the dashboard at a time. For more information on the My Reports feature, please see the OBM Reporting Guide on the [Onboarding Module Training Resources](#) page on myexostar.com.

My Reports		
27 m		
Event Date	Form Request Is ...	Is Form Upgraded
Sep 29 2021 8:49...	No	No
Sep 29 2021 1:26...	No	No
Sep 29 2021 1:28...	No	No
Sep 30 2021 10:0...	No	No
Oct 7 2021 5:47AM	No	No
Oct 8 2021 11:50...	No	No
Oct 8 2021 5:42PM	No	No
Nov 4 2021 1:22P...	No	No
Nov 4 2021 1:33P...	No	No
Nov 4 2021 1:45P...	No	No

dashboard rep		
Completed Date	Form	Last entry date
Feb 3 2023 12:12PM	CR-003 (Standard)-...	Feb 3 2023 12:12PM
Feb 6 2023 6:56PM	OC3-NIST SP 800-...	Feb 6 2023 6:56PM
Feb 24 2023 4:10PM	CR-003 (Standard)-...	Feb 24 2023 4:10PM
Feb 27 2023 9:09PM	Demo-CQ	Feb 27 2023 9:09PM
Mar 4 2023 3:25AM	CR-003 (Standard) ...	Mar 4 2023 3:25AM
Mar 5 2023 3:40AM	CR-003 (Standard-...	Mar 5 2023 3:40AM
Mar 9 2023 6:07AM	Common_Question...	Mar 9 2023 6:07AM
Mar 9 2023 6:07AM	Common_Question...	Mar 9 2023 6:07AM
Mar 17 2023 7:28P...	Common_Question...	Mar 17 2023 7:28P...
Mar 20 2023 6:23A...	TestUAT23	Mar 20 2023 6:23A...

Top Header

The top header provides the following options, and is static regardless of where you are in the OBM application:

- **Exostar Logo:** Click this to redirect to Exostar’s corporate website. This feature is editable from the General Settings page.
- **Onboarding Module:** Click this to navigate to the OBM Dashboard. This feature is editable from the General Settings page.
- **Home:** Click this to navigate to the OBM Dashboard.
- **myExostar:** Click this to navigate to Exostar’s self-help site, which provides on-screen help content, downloadable guides, FAQs, and more. This feature is editable from the General Settings page.
- **Contact Us:** This section is configurable to point to the desired contact. This feature is editable from the General Settings page.
- **User Drop-down:** This section displays your role, and provides options to navigate to your profile, as well as to log out of the system. The Lock icon reflects 2-Factor Authentication enablement. Unlocked reflects no 2FA enablement, and locked reflects 2FA enablement.



Lefthand Navigation Menu

The following options are available from the left-hand navigation menu, and are dependent on your role and permissions:

- **Activities:**
 - **Form Requests:** This page provides a list of all Pending Forms, Pending Approval Forms, Completed Forms, and Cancelled Forms, as well as search capabilities using various filters. Functional Administrators can send forms to Suppliers from this page as well.
 - **Suppliers:** This page provides the ability to search existing suppliers associated with your organization via MAG and Supplier Management Database (SMD), as well as the ability to add new suppliers and send forms to those suppliers.
 - **Reporting Tool:** This page allows you to run Standard Reports and create User Reports based on various entities like supplier organization, user details, form details, etc.
 - **Approval Decision:** This page is available to Functional Admins when a buyer approval workflow is enabled for any form and provides a list of those forms in the sub tabs **Pending Decision**, **Assigned to me** (Forms assigned to you to enter decision), **Decision Complete** (Forms for which decision is complete).
- **Administration:**

- **Form Lifecycle:** The Manage System Forms page allows you to create new forms, as well as manage existing forms.
- **Email Template:** This page allows you to manage system-generated emails by target audience; Buyer Administrator, Supplier Administrator, or Supplier User.
- **Users & Roles:** This page allows you to manage users access and roles within your organization with OBM access.
- **General Settings:** This page allows you to manage General Settings, Banners, Notifications, Appearance, and Attribute Configuration.

FORM CREATION

Forms are used to gather supplier information. Buyer Organization Technical Administrators can create multiple forms using the OBM Form Creation functionality. The five-step form creation process is outlined in the sections below.

Step 1. Add New System Form

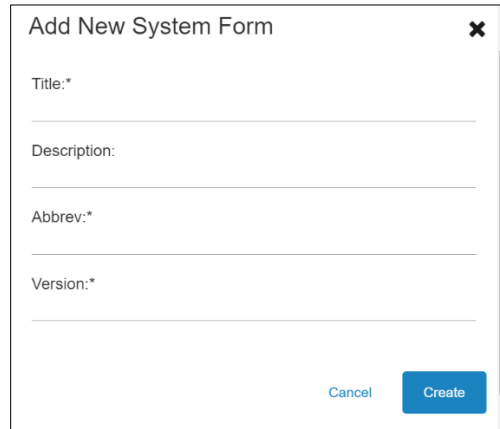
To create a form:

1. On the dashboard, in the left-hand navigation, click **Form Lifecycle**.
2. When the **Manage System Forms** page displays, click the **Create New System Form** button.

The screenshot shows the 'Manage System Forms' interface. At the top right, there is a blue button labeled 'CREATE NEW SYSTEM FORM' which is highlighted with a red rectangular box. Below the button is a search input field. The main area contains a table with three rows of form data. At the bottom, there is a pagination control showing '1' as the selected page and '1 - 3 of 153 Items'.

Form Name	Description	Abbrev	Created	Created By	Updated	Expires In	Version	Form Status	Audience	Renewable	In Use
PPAP Approval	Production Part Approval Process	ppap	04/28/2022	Exostar Admin	-	0 Days	1.0	Enabled	Supplier	No	1
Standard Form NIST SP 800-171 63	NIST 800-171	n63	04/28/2022	Erica Evans	-	0 Days	6.3	Enabled	Supplier	No	2
CR-003 (Standard)-templateapr27	test	abcde	04/27/2022	Hemanth K	-	987 Days	10.0	Disable	Supplier	No	0

3. In the **Add New System Form** prompt, enter a **Title**, **Description**, **Abbreviation**, and **Version** number for the form. Click the **Create** button.



Add New System Form

Title:*

Description:

Abbrev:*

Version:*

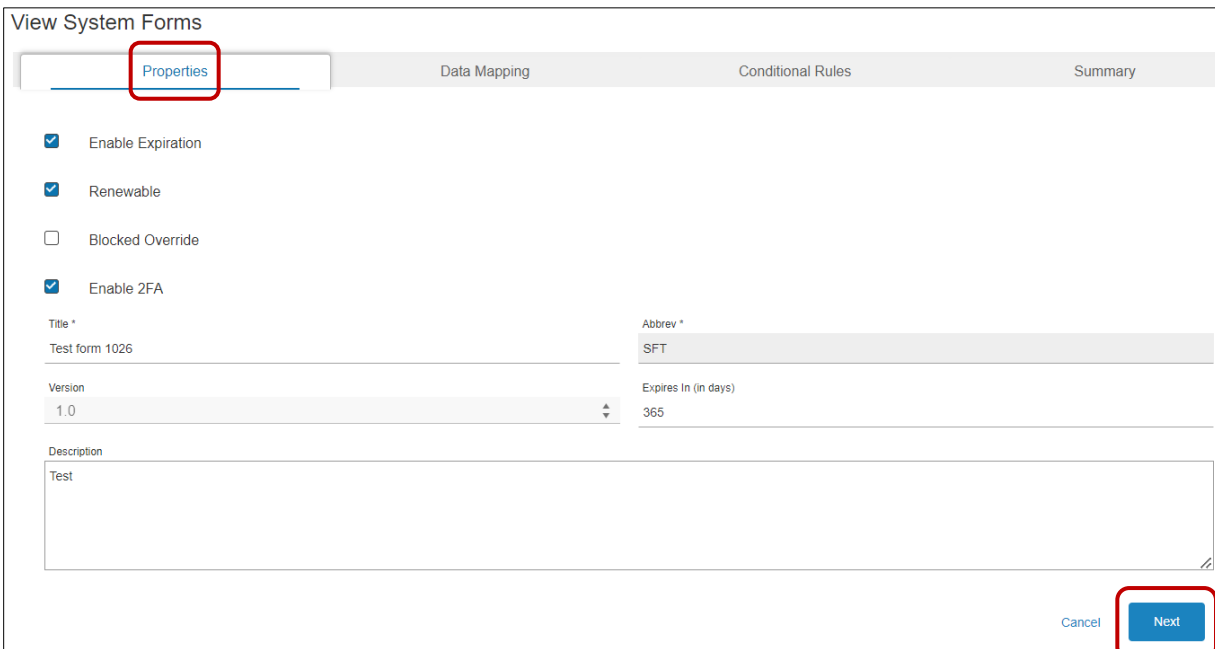
Cancel Create

Step 2. Properties Tab

To edit the Properties tab:

1. Place checkmarks next to the desired options:
 - a. **Enable Expiration:** This allows you to set the number of days the form will be set to expire using the **Expire in (in days)** field.
 - b. **Renewable:** This allows a Supplier to renew the form on their own.
 - c. **Blocked Override:** This feature is client-specific, please ignore.
 - d. **Enable 2FA:** This form will require 2FA enabled on a logged in user to access view/edit the form.

2. Click **Next**.



View System Forms

Properties Data Mapping Conditional Rules Summary

Enable Expiration

Renewable

Blocked Override

Enable 2FA

Title * Test form 1026

Abbrev * SFT

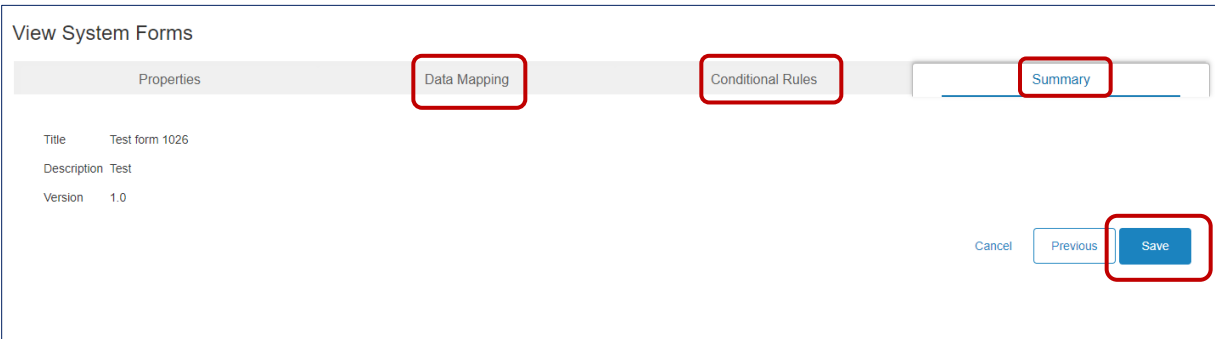
Version 1.0

Expires In (in days) 365

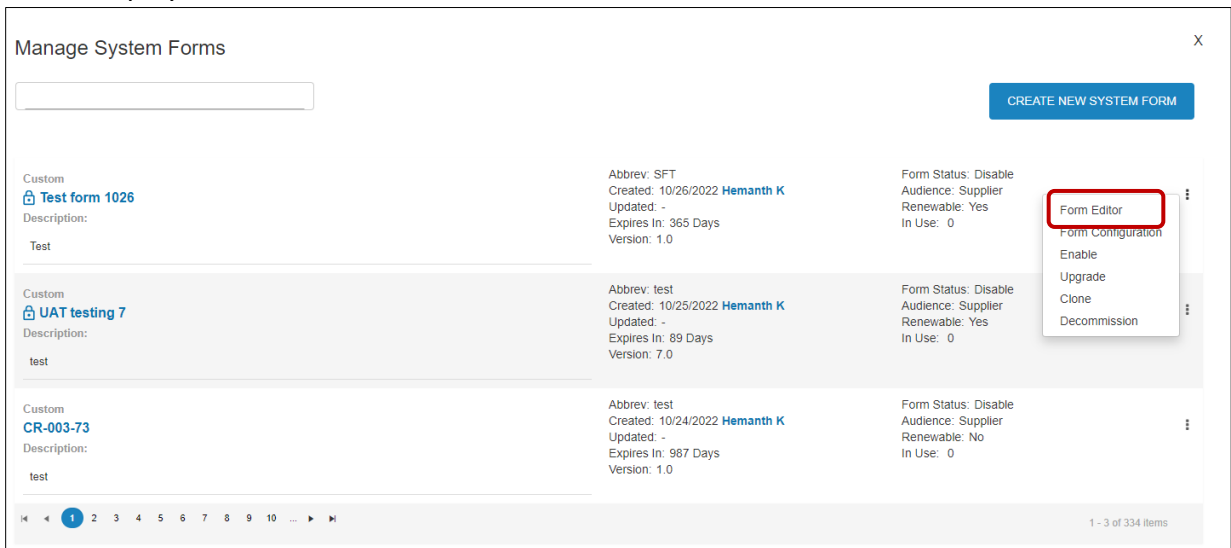
Description Test

Cancel Next

3. Click the **Next** button on the following tabs:
 - a. **Data Mapping:** Used for another client to map data fields to an external database. Please ignore for now.
 - b. **Conditional Rules:** This tab allows you to enable or disable required fields based on the values of other fields. For example, if X, then Y.
 - c. **Summary:** A quick review of your title, description, and version, as well as a place to save the configuration.
4. Click **Save**.

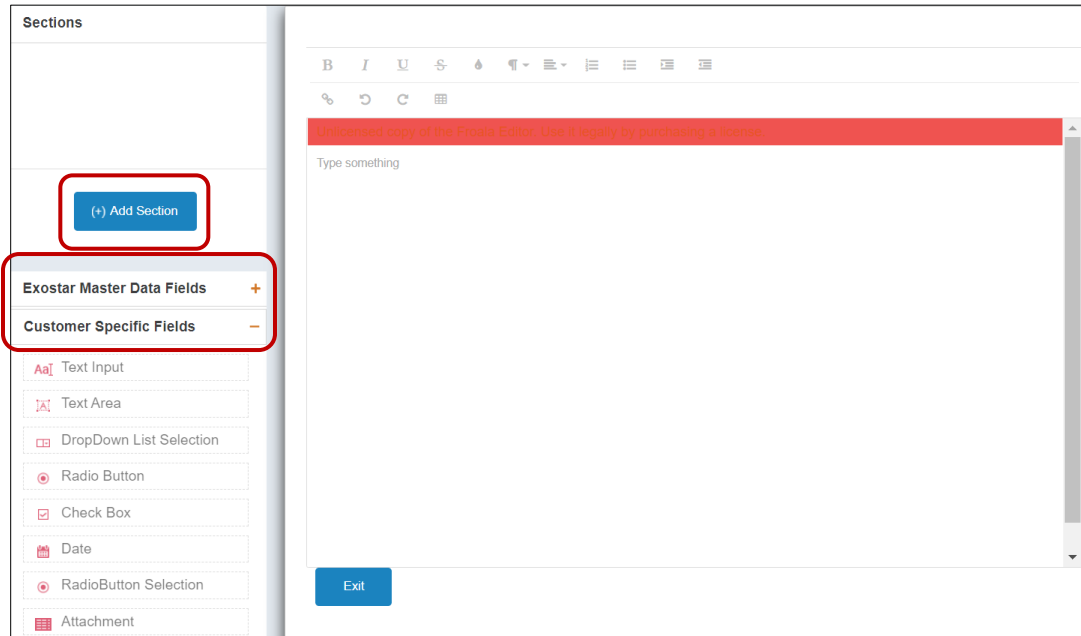


5. To start building the form, click on **Form Editor** when the **Manage System Forms** page displays.



6. In the **Form Editor**, add sections and questions using the **+Add Section** button, **Master Data Fields** or **Custom** controls along the left-hand side of the screen.

NOTE: Master Data Fields pulls data from a master database for Supplier information and is auto populated so the Supplier does not have to enter the information. Custom data fields allows you to create your own custom questions and fields.



NOTE: Once you start adding sections, **Master Data Fields** or **Customer Specific Fields**, **Save & Configure**, **Save** and **Preview** buttons display in the bottom right corner of the form. Sections are like pages and sub-sections are like tabs on a page. We highly recommend creating sections and sub-sections, instead of the entire form being on a single page.

7. Once you add all desired sections, sub-sections, and fields, click **Save & Configure** to return to the **Properties** tab.

The screenshot shows the 'Sections' configuration interface. On the left, there is a sidebar with 'Sections' (containing 'Sec 1' and an 'Add Section' button), 'Exostar Master Data Fields', and 'Customer Specific Fields' (listing various field types like Text Input, Text Area, DropDown List Selection, etc.). The main area shows 'Sec 1' with a rich text editor and a 'Name' field. At the bottom right, the 'Save & Configure' button is highlighted with a red box, along with 'Save' and 'Preview' buttons.

8. On the **Properties** tab, click **Next** to open the **Data Mapping** tab.

The screenshot shows the 'View System Forms' interface with the 'Properties' tab selected. It features several checkboxes: 'Enable Expiration' (checked), 'Renewable', 'Blocked Override', and 'Enable 2FA'. Below these are input fields for 'Title *' (Training Team Test 2023), 'Abbrev *' (TTT23), 'Version' (1.0), and 'Expires In (in days)' (0). A 'Description' text area contains the word 'Test'. At the bottom right, the 'Next' button is highlighted with a red box, next to a 'Cancel' button.

Step 3. Data Mapping

This is a client-specific tab, so click **Next** to continue to the **Conditional Rules** tab.

The screenshot shows the 'View System Forms' interface with the 'Data Mapping' tab selected. The 'Next' button at the bottom right is highlighted with a red box.

Step 4. Add Conditional Rules

The options that display in the drop-down menus on this tab, are pulled from the sections and questions you created in the Form Editor. To create a conditional rule:

1. Place a checkmark next to **Is Required** if you want the **Target Control** to be required if the **Source Evaluation** is **True**.
2. Select from the **Source Section** and **Source Control** drop-down menus.
3. Select from the **Target Section** and **Target Control** drop-down menus.
4. Choose what to compare Target Value to by first choosing the **Evaluation method** and then type in the value in **Compare To Value** field.
5. Click **Add** to create the rule. Click **Next** when all rules are added.

NOTE: To manage an existing rule, click **Edit** to update selections or click **Delete** to remove.

The screenshot shows the 'View System Forms' interface with the 'Conditional Rules' tab selected. The 'Add', 'Edit', and 'Delete' buttons are highlighted with red boxes.

Section	Source	Target	Method	Compare To Value	Required	Action
Organization Compliance	Are you International Standards Organization (ISO) 9000 Certified	If Yes, What Level?	Equal	yes	No	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Step 5. Review Summary Tab

To complete the form creation process:

1. On the **Summary** tab, review all data input. Go back and make edits, if necessary.
2. Click **Save** to complete editing your form. The system takes you back to the **Manage System Forms** page.

View System Forms

Properties Data Mapping Conditional Rules **Summary**



Title Training Team Test

Description June 2022

Version 1

Cancel Previous **Save**

NOTE: You can preview the form by clicking the arrow next to the **Form Name**. Once the form has been sent to the Supplier, you can no longer edit the form.

Custom MDM  Description: test	Abbrev: test Created: 05/31/2023 Hemanth K Updated: - Expires In: 30 Days Version: 2.0	Form Status: Enabled Audience: Supplier Renewable: Yes In Use: 1	
Custom 31B cust Description: testing	Abbrev: QA Created: 05/31/2023 Hemanth K Updated: - Expires In: 0 Days Version: 1.0	Form Status: Disable Audience: Supplier Renewable: No In Use: 0	 Form Editor Form Configuration Enable Upgrade Clone Decommission

MANAGE SYSTEM FORMS

The Manage System Forms page provides a comprehensive list of forms, as well as the option to create a new form. Each row provides a snapshot of the specific form’s details, as well as form management options via the ellipses, located to the far right of each form row. This drop-down menu’s options depend on the current Form Status. Please see the possible options and their descriptions:

- **Form Editor:** This allows you to edit form sections, sub-sections, and fields.
- **Form Configuration:** This allows you to manage Form Properties and Conditional Rules.
- **Enable:** Only displays when the **Form Status** is **Disable**. Select this option to enable the form for use and to send out to Suppliers.
- **Disable:** Only displays when the **Form Status** is **Enabled**. Select this option to disable the form from use. Once disabled, the form can no longer be sent out to Suppliers.
- **Upgrade:** Only displays when the **Form Status** is **Disable**. You must create a new version of a form prior to taking this action. This option also allows you to make changes to an

existing form while auto updating the Supplier's form to view new changes while retaining existing information.

- **Clone:** This option allows you to create a copy of an existing form as a template for a new form, or to be used to update or upgrade an existing form with new fields.
- **Decommission:** This option allows you to remove it from the Manage System Forms screen and from being used again. Once this action is completed, the form can no longer be assigned. If the form is still in Supplier View, you may need to cancel the form in Form Requests.

NOTE: Once a form is sent to a Supplier, the only options that display are: Disable, Clone, and Decommission.

Enable/Disable Form

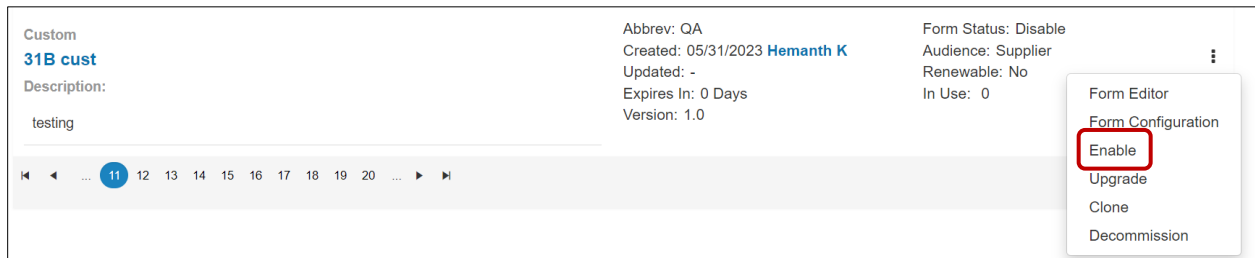
Enable: Only displays when the **Form Status** is **Disable**. Select this option to enable the form for use and to send out to Suppliers.

Disable: Only displays when the **Form Status** is **Enabled**. Select this option to disable the form from use. Once disabled, the form can no longer be sent out to Suppliers.

To enable or disable a form:

1. From the left-hand navigation, select **Form Life Cycle**.
2. Locate the desired form. Select **Enable** or **Disable** from the ellipses at the end of the row.

NOTE: The **Form Status** reflects the change.



The screenshot displays the 'Form Life Cycle' interface. On the left, a form titled '31B cust' is shown with a description of 'testing'. On the right, a metadata panel includes 'Abbrev: QA', 'Created: 05/31/2023 Hemanth K', 'Updated: -', 'Expires In: 0 Days', and 'Version: 1.0'. Further right, the 'Form Status' is 'Disable', 'Audience' is 'Supplier', 'Renewable' is 'No', and 'In Use' is '0'. A vertical ellipsis menu is open, showing options: 'Form Editor', 'Form Configuration', 'Enable' (highlighted with a red box), 'Upgrade', 'Clone', and 'Decommission'. A pagination bar at the bottom shows page 11 of 20.

Clone Form

To clone an existing form:

1. From the left-hand navigation, select **Form Life Cycle**. Locate the desired form. Select **Clone** from the ellipses at the end of the row.

Custom NIST SP 800-171 - Standard-1 Description: Fixes to original NIST form	Abbrev: NIST Created: 12/22/2022 Shivani Chadha Updated: - Expires In: 365 Days Version: 1.0	Form Status: Disable Audience: Supplier Renewable: Yes In Use: 0	⋮
Custom NIST SP 800-171 - Standard-1222 ↗ Description: Test	Abbrev: NIST Created: 12/22/2022 Hemanth Kanugolu Updated: - Expires In: 365 Days Version: 1.0	Form Status: Enabled Audience: Supplier Renewable: Yes In Use: 2	Form Editor Form Configuration Enable Upgrade Clone Decommission

2. Update the **Form Name**. Add an **Abbreviation**, **Version Number** and **Description**. Click **Clone**.

Clone Form

Name :*

Training Team Test

Version Number :*

Abbr :*

Description :*

Cancel Clone

Upgrade Form

OBM provides the ability to upgrade a form from its current version to a newer version. Prior to upgrading the form, you must first create the new version. To upgrade a form:

1. Navigate to the **Form Life Cycle** page. Locate the desired form. Select **Clone** from the ellipses.

Custom NIST SP 800-171 - Standard-1 Description: Fixes to original NIST form	Abbrev: NIST Created: 12/22/2022 Shivani Chadha Updated: - Expires In: 365 Days Version: 1.0	Form Status: Disable Audience: Supplier Renewable: Yes In Use: 0	⋮
Custom NIST SP 800-171 - Standard-1222 ↗ Description: Test	Abbrev: NIST Created: 12/22/2022 Hemanth Kanugolu Updated: - Expires In: 365 Days Version: 1.0	Form Status: Enabled Audience: Supplier Renewable: Yes In Use: 2	Form Editor Form Configuration Enable Upgrade Clone Decommission

2. Ensure you leave the **Form Name** the same. Give a higher **Version Number** from the original form. Click **Clone**.

Clone Form ✕

Name :*

Training Team Test

Version Number :*

Abbr :*

Description :*

[Cancel](#) [Clone](#)

3. Make desired edits to cloned form. Ensure the **Form Status** for the form you want to upgrade is set to **Disable** and the newer version's status is set to **Enabled**. Select **Upgrade** from the ellipses.

Custom NIST SP 800-171 - Standard-1 Description: Fixes to original NIST form	Abbrev: NIST Created: 12/22/2022 Shivani Chadha Updated: - Expires In: 365 Days Version: 1.0	Form Status: Disable Audience: Supplier Renewable: Yes In Use: 0	⋮
Custom NIST SP 800-171 - Standard-1222 ↗ Description: Test	Abbrev: NIST Created: 12/22/2022 Hemanth Kanugolu Updated: - Expires In: 365 Days Version: 1.0	Form Status: Enabled Audience: Supplier Renewable: Yes In Use: 2	Form Editor Form Configuration Enable Upgrade Clone Decommission

4. On the **Upgrade Forms** page, select the **Source Form** (original/old version number). Select the **Destination Form** (new or upgraded form/new version number). Click **Next**.

Upgrade Forms

[Destination Selection](#) [Question Mapping](#)

Source Form **Training Team Test 2023 - 1.0** ▼ Destination Form **Training Team Test 2023 - 2.0** ▼

[Cancel](#) [Next](#)

5. The **Question Mapping** tab allows you to map original form questions to the upgraded version. To map questions, select the **Source Question** and the **Destination Questions**. Click **Add**. Once you map all fields, click **Save**.

Upgrade Forms

Destination Selection | **Question Mapping**

Source Questions | Destination Questions | Add

Source Question	Destination Question	Action
Organization Name	Organization Name	<input type="button" value="X Delete"/>
Organization Address 1	Organization Address 1	<input type="button" value="X Delete"/>
Organization State	Organization State	<input type="button" value="X Delete"/>

1 - 3 of 3 items

Cancel | Previous | **Save**

NOTE: If a Supplier has an older version of the form, the system prompts them to upgrade when they try to edit it form.

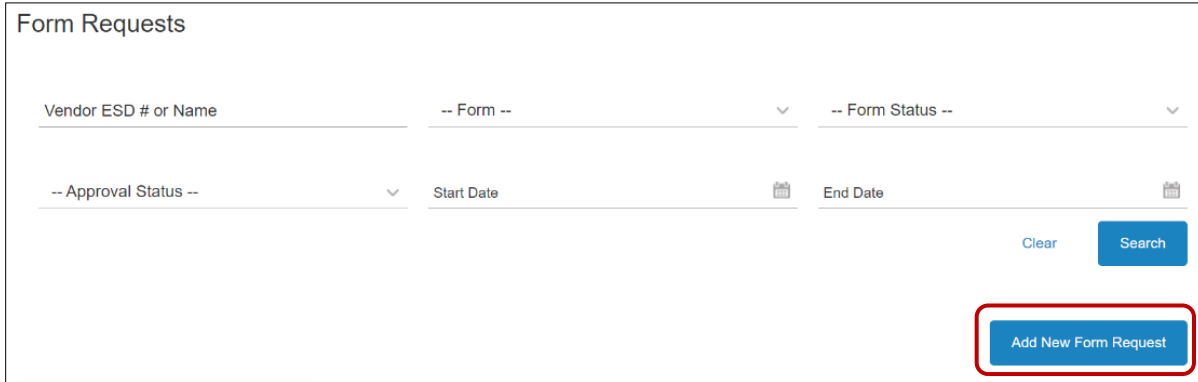
FORM ASSIGNMENTS

Functional Administrators can assign a single form to a single Supplier, multiple forms to a single Supplier, as well as a single form to multiple Suppliers. Functional Administrators can also reassign forms.

Assign Single Form to Single Supplier

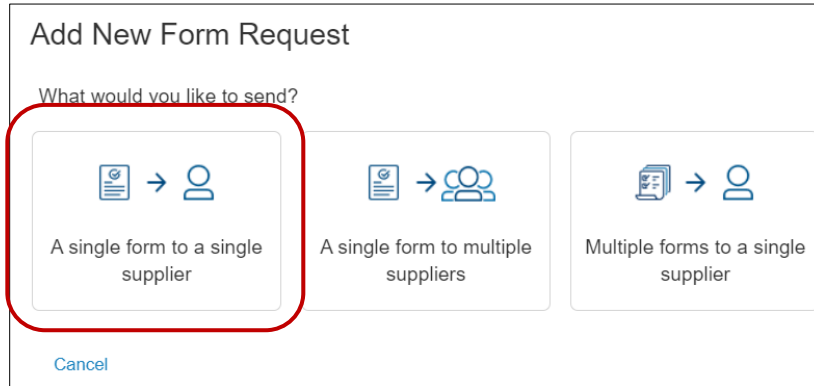
To assign a single form to a single Supplier:

1. On the dashboard, click **Form Requests**. Click the **Add New Form Request** button.



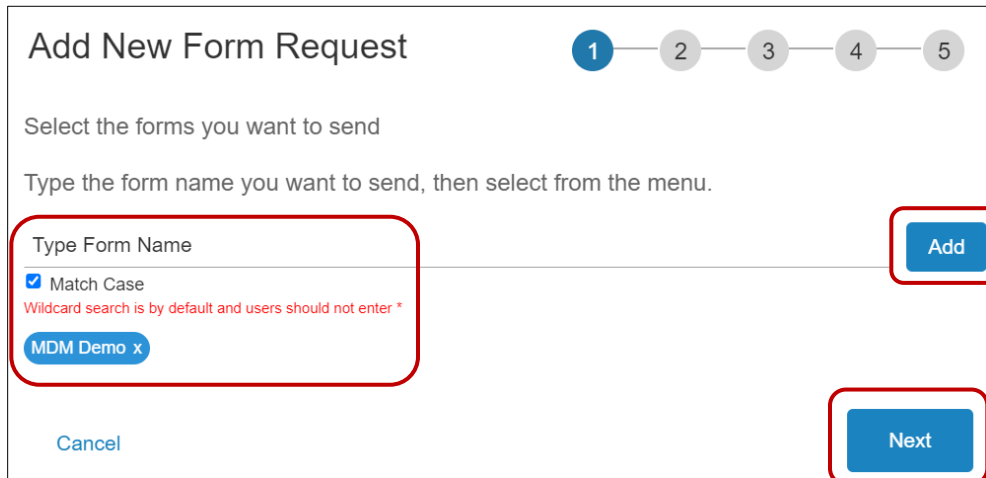
The screenshot shows the 'Form Requests' dashboard. At the top, there are search filters for 'Vendor ESD # or Name', '-- Form --', '-- Form Status --', '-- Approval Status --', 'Start Date', and 'End Date'. There are 'Clear' and 'Search' buttons. In the bottom right corner, the 'Add New Form Request' button is highlighted with a red box.

2. Select **A single form to a single supplier**.



The screenshot shows the 'Add New Form Request' dialog. The question 'What would you like to send?' is at the top. There are three options: 'A single form to a single supplier' (highlighted with a red box), 'A single form to multiple suppliers', and 'Multiple forms to a single supplier'. A 'Cancel' button is at the bottom left.

3. Type the desired form name. Click **Add**. Once you finish adding desired form, click **Next**.
NOTE: Place a checkmark next to **Match Case** for the field to be case-sensitive. The added form displays in a blue bubble. Click the **X** to remove. An error displays if you try to add multiple forms.



The screenshot shows the 'Add New Form Request' dialog at step 1. It has a progress indicator with steps 1-5. The instruction is 'Select the forms you want to send'. Below that, it says 'Type the form name you want to send, then select from the menu.' There is a text input field with 'Type Form Name' and an 'Add' button. Below the input field, there is a checked 'Match Case' checkbox and a note: 'Wildcard search is by default and users should not enter *'. A blue bubble containing 'MDM Demo x' is shown below the input field. At the bottom, there are 'Cancel' and 'Next' buttons. The 'Add' button and the 'Next' button are highlighted with red boxes.

4. Enter the **Supplier Name**. Click the name when located in the search results box. Click **Next**.

NOTE: The added Supplier displays in a blue bubble. Select the **X** to remove any unwanted Suppliers. An error displays if you try to add multiple Suppliers.

The screenshot shows the 'Add New Form Request' interface at step 2 of a 5-step process. The progress indicator shows a green checkmark at step 1, step 2 is highlighted in blue, and steps 3, 4, and 5 are greyed out. The main heading is 'Add New Form Request'. Below it, the instruction reads 'Select which supplier you want to contact'. A sub-instruction says 'Type the supplier name or supplier attribute you want to send, then select from the menu.' There is a search input field with the placeholder text 'Enter Supplier Name' and a clear 'X' button. Below the input field, a red warning message states 'Wildcard search is by default and users should not enter *'. A search result is displayed as a blue bubble with the text 'JON INGE & ASSOCIATES x'. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'.

5. The **Existing User** checkbox is already selected and provides a drop-down of existing users for the Supplier. Select from the drop-down menu. Click **Next**.

The screenshot shows the 'Add New Form Request' interface at step 3 of a 5-step process. The progress indicator shows green checkmarks at steps 1 and 2, step 3 is highlighted in blue, and steps 4 and 5 are greyed out. The main heading is 'Add New Form Request'. Below it, the instruction reads 'Select a user from the organization'. The 'SupplierName' is displayed as 'FIBRE GLASS-EVERCOAT COMPANY, INC'. There is a checked checkbox labeled 'Existing Users'. Below the checkbox is a drop-down menu with the text '--Select User--' and a downward arrow. At the bottom, there are three buttons: 'Cancel', 'Previous', and 'Next'.

NOTE: Deselect the box to display new user fields. Input information. Click **Next**.

Add New Form Request

Select a user from the organization

SupplierName: JON INGE & ASSOCIATES

Existing Users

First Name *

Last Name *

Email *

Cancel Previous Next

6. Select to enable or disable Buyer Workflow Approvals and assign Buyer Users as the approvers to the form. If **Yes** is selected, the admin has the option to assign the same approvers to all the forms. Select the approver name from the drop down. Click **Next**.

Add New Form Request

Do you wish to enable workflow approvals ?

Yes No

All selected forms

Form 0
Training Team Test 2022

Workflow approval enabled

Type the approver names you want to add, then select from the menu.
You can select up to 5 approvers.

Select

ExostarBuyer x

Cancel Previous Next

- The system prompts you to review the summary. If you do not wish to make any changes, click **Done**.

Add New Form Request

Please review the summary below. Click 'PREVIOUS' to navigate back and make changes.

Form selection

Form Name
Training Team Test 2022

Supplier and user selection

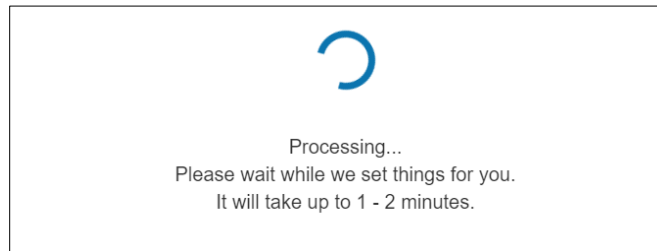
Supplier	User selection
Supplier SEM 1	Exostar Supplier

Workflow approvals

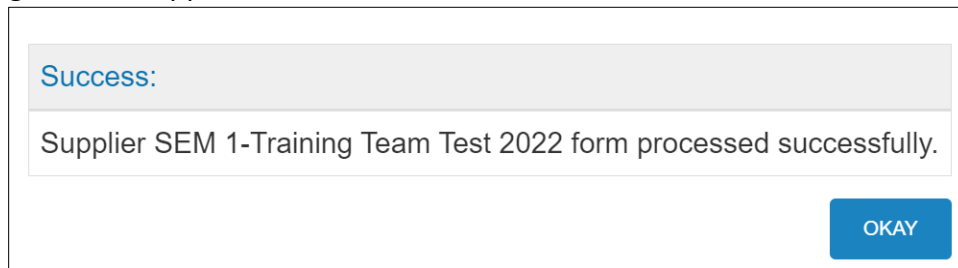
Workflow	Form Name	Approver Name
✓	Training Team Test 2022	ExostarBuyer

Cancel Previous Done

NOTE: A processing screen displays.



- On the **Success** dialogue box, click **Okay**. At this point your form has been successfully assigned to a Supplier Administrator.



[Assign Single Form to Multiple Suppliers](#)

To assign a single form to multiple Suppliers:

1. On the dashboard, click **Form Requests**. Click the **Add New Form Request** button.

Form Requests

Vendor ESD # or Name -- Form -- -- Form Status --

-- Approval Status -- Start Date End Date

Clear Search

Add New Form Request

2. Select **A single form to multiple suppliers**.

Add New Form Request

What would you like to send?

A single form to a single supplier

A single form to multiple suppliers

Multiple forms to a single supplier

Cancel

3. Type the desired form name. Click **Add**. Once you finish adding the desired form, click **Next**.

NOTE: Place a checkmark next to **Match Case** for the field to be case-sensitive. The added form displays in a blue bubble. Click the **X** to remove. An error displays if you try to add multiple forms.

Add New Form Request

1 2 3 4 5

Select the forms you want to send

Type the form name you want to send, then select from the menu.

Type Form Name

Match Case

Wildcard search is by default and users should not enter *

MDM Demo x

Add

Cancel

Next

4. Select to **Search By Name** or **Search By Attribute**, which are like groups of suppliers that can be configured in General Settings. Enter the **Name**. Click the name when located in the search results box. Complete this process as many times as necessary. Once all Suppliers are added, click **Next**.

NOTE: The added Suppliers displays in a blue bubble. Select the **X** to remove any unwanted Suppliers.

Add New Form Request

Select which supplier you want to contact

Type the supplier name or supplier attribute you want to send, then select from the menu.

Search By Name Search By Attribute

small shops

Supplier SEM 1 x IDC test org x TestUAT22 x Bhagya6 x Express Inc. x

Cancel Previous Next

5. Select a Supplier and an assigned User for each Supplier. Click **Next**.

NOTE: Existing Users is automatically checked. Remove the checkmark to add a new user for that specific Supplier.

Add New Form Request

Select supplier from menu and assign user.

IDC test org

Existing Users

Subbaiah AC

ADD TO LIST

Supplier Name	User Name
Supplier SEM 1	Exostar Supplier
IDC test org	Subbaiah AC

Cancel Previous Next

6. Select to enable or disable Buyer Workflow Approvals and assign Buyer Users as the approvers to the form. If **Yes** is selected, the admin has the option to assign the same approvers to all the forms. If **No**, the admin has the option to assign different users in each Supplier tab. Select the approver name from the drop down. Click **Next**.

Add New Form Request [Progress: 1, 2, 3, 4, 5]

Do you wish to enable workflow approvals ?

Yes No

Do you wish to set same approvers for all of the selected requests ?

Yes No

Supplier SEM 1 IDC test org Preview

Workflow	Supplier Name	Approvers
✓	Supplier SEM 1	ExostarBuyer
✓	IDC test org	JoeyScarpulla

Cancel Previous **Next**

7. The system will prompt you to review the summary. If you do not wish to make any changes, click **Done**.

Add New Form Request [Progress: 1, 2, 3, 4, 5]

Please review the summary below. Click 'PREVIOUS' to navigate back and make changes.

Form selection

Form Name
Training Team Test 2022

Supplier and user selection

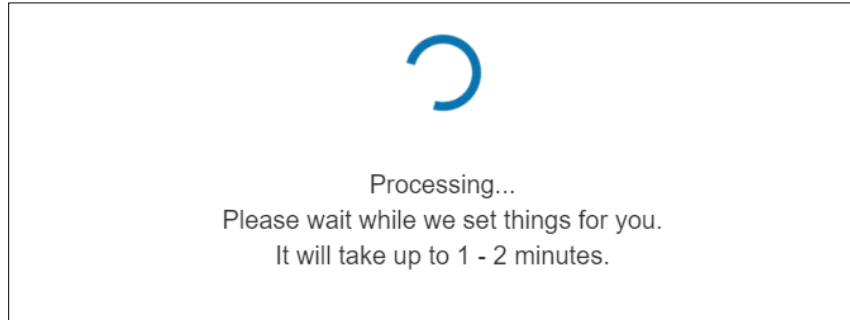
Supplier	User selection
Supplier SEM 1	Exostar Supplier
IDC test org	Subbaiah AC

Workflow approvals

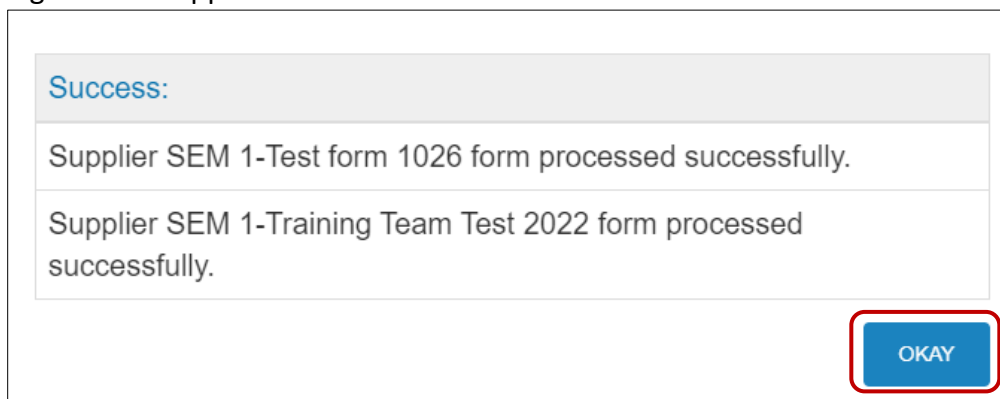
Workflow	Supplier Name	Approvers
✓	Supplier SEM 1	ExostarBuyer
✓	IDC test org	JoeyScarpulla

Cancel Previous **Done**

NOTE: A processing screen displays.



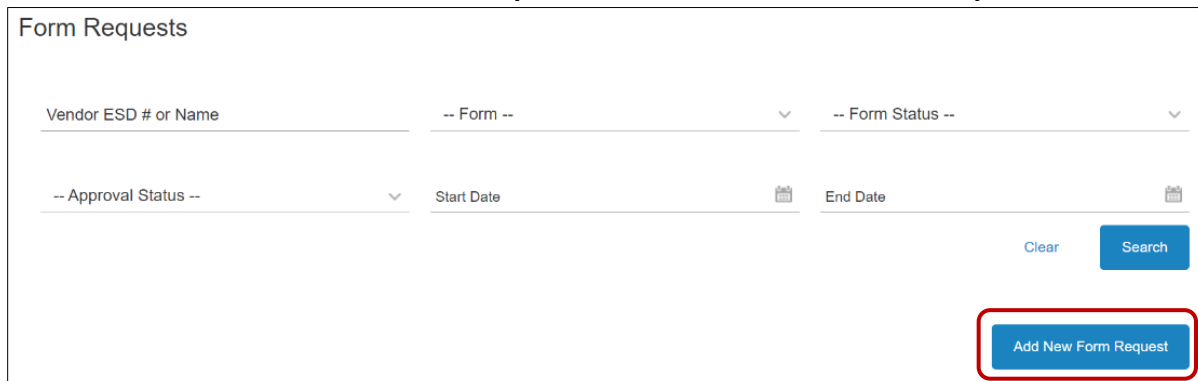
8. On the **Success** dialogue box, click **Okay**. At this point your form has been successfully assigned to a Supplier Administrator.



Assign Multiple Forms to Single Supplier

To assign multiple forms to a single Supplier:

1. On the dashboard, click **Form Requests**. Click the **Add New Form Request** button.



2. Select **Multiple forms to a single supplier.**

Add New Form Request

What would you like to send?

A single form to a single supplier

A single form to multiple suppliers

Multiple forms to a single supplier

Cancel

3. Type the desired form name. Click **Add**. Once you finish adding the desired form, click **Next**.

NOTE: Place a checkmark next to **Match Case** for the field to be case-sensitive. The added forms are displayed in blue bubbles. Click the **X** to remove any unwanted forms.

Add New Form Request

1 — 2 — 3 — 4 — 5

Select the forms you want to send

Type the form name you want to send, then select from the menu.

Type Form Name

Match Case

Wildcard search is by default and users should not enter *

saab x 1sign_test_2fa_score x

Cancel

Add

Next

4. Enter the **Supplier Name**. Click the name when located in the search results box. Click **Next**.

NOTE: The added Supplier displays in a blue bubble. Select the **X** to remove any unwanted Suppliers. An error displays if you try to add multiple Suppliers.

Add New Form Request

Select which supplier you want to contact

Type the supplier name or supplier attribute you want to send, then select from the menu.

Enter Supplier Name

Wildcard search is by default and users should not enter *

JON INGE & ASSOCIATES x

Cancel Previous Next

5. The **Existing User** checkbox is already selected and provides a drop-down of existing users for the Supplier. Select from the drop-down menu. Click **Next**.

Add New Form Request

Select a user from the organization

SupplierName: FIBRE GLASS-EVERCOAT COMPANY, INC

Existing Users

--Select User--

Cancel Previous Next

NOTE: Deselect the box to display new user fields. Input information. Click **Next**.

Add New Form Request

Select a user from the organization

SupplierName: JON INGE & ASSOCIATES

Existing Users

First Name *

Last Name *

Email *

Cancel Previous Next

6. Select to enable or disable Buyer Workflow Approvals and assign Buyer Users as the approvers to the form. If **Yes** is selected, the admin has the option to assign the same approvers to all the forms. Select the approver name from the drop down. Click **Next**.

Add New Form Request ✓ ✓ ✓ 4 5

Do you wish to enable workflow approvals ?

Yes No

Do you wish to set same approvers for all of the selected forms ?

Yes No

All selected forms

Form 0 Test form 1026	Form 1 Training Team Test 2022
--------------------------	-----------------------------------

Workflow approval enabled

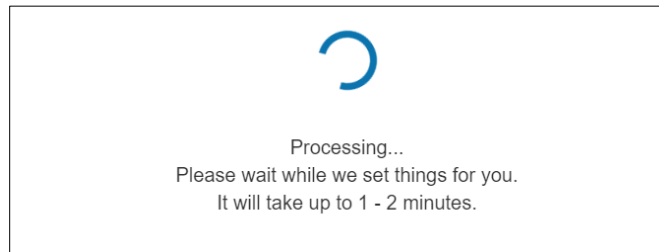
Type the approver names you want to add, then select from the menu.
You can select up to 5 approvers.

Select ▼

ShivaniBuyerApprover x SubbaiahAchappa x

Cancel Previous **Next**

NOTE: A processing screen displays.



7. On the **Success** dialogue box, click **Okay**. At this point your form has been successfully assigned to a Supplier Administrator.

Success:

Supplier SEM 1-Test form 1026 form processed successfully.

Supplier SEM 1-Training Team Test 2022 form processed successfully.

OKAY

Reassign Form

Please note, only Functional Administrators can reassign a Supplier User from the Buyer role. To reassign a pending form:

1. On the dashboard, click **Form Requests**. On the **Pending Forms** tab, locate the desired form and select the ellipses in the **Action** column. Click **Reassign**.

Pending Forms (71)		Pending Approval Forms			Completed Forms			Cancelled Forms		
Request #	ESD #	Vendor	Form	Initiated	Status	Request Status	Status Date	Approval Status	Assigned	Action
<input type="checkbox"/>	GRFOIT41	887799443	Supplier SEM...	upgradetest	06/22/2022	Form Started	80%	06/22/2022	Subbaiah BA	⋮
<input type="checkbox"/>	UORIW3U1	887799443	Supplier SEM 1	16uat	06/21/2022	Provisioned	40%	06/21/2022	N/A	Subbaiah

2. Select the desired Supplier User from the dropdown. Click **Save**.

Assign User ✕

Assign To User
 Select User

Close
Save

FORM DETAILS PAGE

Select any **Form Name** in the system to open the individual **Form Details** page. This page provides form management options, outlined below.

Request History

The request history outlines details for each form request of the form previously sent to the supplier organization. Please note, all underlined information is clickable, and clicking the **Request ID** will update the **Workflow Timeline**.

Request ID	Initiated	Initiated By	Assigned To	Status	Status Date	BuyerApprovalStatus	Form Progress	Rev.
<u>ULYMW1J9</u>	10/19/2021	Hemanth Kanugolu	Shivani Chadha	Provisioned	10/19/2021	N/A	0%	0.0

1 - 1 of 1 items

Workflow Timeline

This section outlines the workflow details for the specific form.

Workflow Timeline					Request: ULYMW1J9
	Request Created	Provisioned	First Time Access	Form Started	Form Completed
Planned	10/19/2021	10/29/2021	11/03/2021	11/08/2021	12/03/2021
Actual	10/19/2021	10/19/2021			

* Denotes pending provisioning | + Denotes supplier (self) initiated

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.

Assignment History	
User	Date Assigned
Shivani Chadha	10/19/2021

1 - 1 of 1 items

Print Forms

Functional/Technical Administrators can only see and download forms, whether completed or in progress.

Print Last Submitted Forms

To print the last submitted form:

1. Navigate to the desired **Form Details** page and locate the **Downloads** section.
2. Click the PDF icon next to **Latest Submitted Revision**.

Form Details

Vendor: Supplier SEM One	Form: CSQ-94
ESD: 123456789	Expires on: 10/21/2022 12:41:05 AM
Exostar ID: 119664516	

Summary

Overall Score	3.54
Capability Score	2.96

Empty Forms [Download](#)

Latest Submitted Revision: 3.0 [Download](#) [View](#)

3. Select the **Print** option and follow your system's print process.

Print Older Form Version

To view and print older revisions of the form:

1. Go to the **Rev.** column of the **Revision History** table and click the revision number link of any form to download.

Request ID	Initiated	Initiated By	Assigned To	Status	Status Date	Score	Form Progress	Rev.
GRFQIT41 +	06/22/2022	Exostar Buyer, eva.latimer@hil-nns.com	Subbaiah BA	Form Started	06/22/2022	0	<div style="width: 86%;"><div style="background-color: #0070C0; height: 10px;"></div></div> 86%	2.1 (Draft)
QIKXP47P	05/09/2022	Exostar Buyer, eva.latimer@hil-nns.com	Subbaiah BA	Completed	05/18/2022	0	<div style="width: 100%;"><div style="background-color: #0070C0; height: 10px;"></div></div> 100%	2.0
D1FPKDAO	05/06/2022	Exostar Buyer, eva.latimer@hil-nns.com	Exostar Supplier	Completed	05/09/2022	0	<div style="width: 100%;"><div style="background-color: #0070C0; height: 10px;"></div></div> 100%	1.0

2. Select the **Print** option.

Approval Workflow

If a form is still Pending, Approval Workflow can be enabled or disabled, and users can be added, removed, or changed from the workflow via the Form Details page. To update the Approval Workflow settings:

1. Navigate to the **Form Details** page of the desired pending form. Select the **Approval Workflow** button.

Request: YJCLQKJM

ed	Form Completed
22	11/12/2022
22	09/28/2022

Assignment History

User	Date Assigned
Exostar Supplier	11/11/2022
Subbaiah BA	11/07/2022
Exostar Supplier	10/28/2022
Exostar Supplier	09/28/2022
Exostar Supplier	09/06/2022

1 - 5 of 17 items

Exit
Cancel
Reassign
Approval Workflow

2. Place a checkmark to enable or remove the checkmark to disable. If desired, update the **Approver** selections. Click the **Save** button to complete.

Approval Workflow

Enable Approval Workflow

Approver
Joey Scarpulla

Approver
-- Select User --

Approver
-- Select User --

Approver
-- Select User --

Approver
-- Select User --

Close Save

BULK DOWNLOAD COMPLETED FORMS

Functional/Technical Administrators can also bulk download Completed Forms. To bulk download forms:

1. From the Dashboard, click **Form Requests**.
2. Go to the **Completed Forms** tab. Place checkmarks next to all desired forms.
3. Select **Bulk Download** on the bottom left of the screen.

<input type="checkbox"/>	Supplier SEM One	Test-B6(SSWSS)	10/04/2021
<input type="checkbox"/>	Supplier SEM One	Test-B2(WSS)	10/04/2021
<input type="checkbox"/>	Supplier SEM One	MDM-latest	10/04/2021
<input type="checkbox"/>	Supplier SEM One	mdm	10/01/2021
<input type="checkbox"/>	Supplier SEM One	testZZ	10/01/2021

1 2 3 4 5 items per page 20

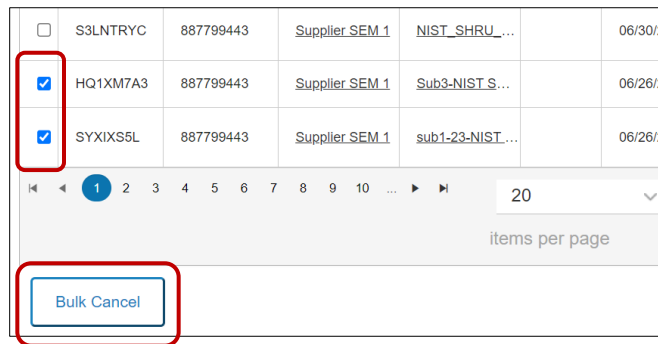
Bulk Download

* Denotes pending provisioning | + Denotes supplier (self) initiated

BULK CANCEL FORMS

Functional/Technical Administrators can also bulk download Completed Forms. To bulk download forms:

1. From the Dashboard, click **Form Requests**.
2. Go to the **Pending Forms** tab. Place checkmarks next to all desired forms.
3. Select **Bulk Cancel** on the bottom left of the screen.

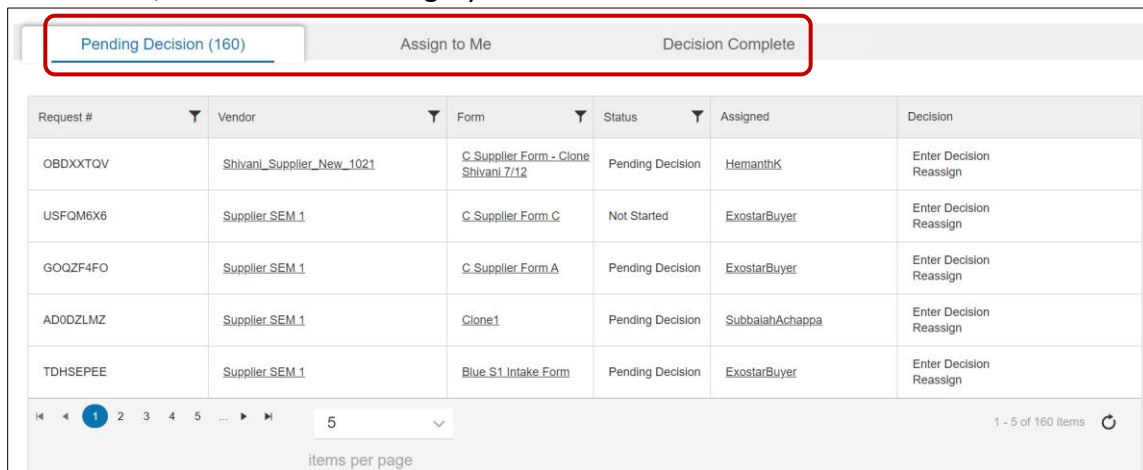


APPROVAL DECISION

This page is available to Functional Administrators. It displays forms with the approval workflow enabled, which is selected during the form creation process. There is a search feature at the top of the screen and below that, the following tabs are provided:

- **Pending Decision:** Provides a comprehensive list of all forms which are Pending Decision for the Buyer Approval Workflow, which is enabled during the form submission process.
- **Assigned to Me:** Provides a list of forms assigned to you to enter decision.
- **Decision Complete:** Provides a list of forms for which decision is complete (approved or rejected).

IMPORTANT! Unless a form is assigned to you for an approval decision and has a **Pending Decision** status, the action links are grayed out and not clickable.



Approve Form

To approve a form:

1. Select **Approval Decision** from the left-hand menu.
2. Locate the desired form. Click the **Enter Decision** link.

NOTE: If **Approval Decision** has been assigned to you, the form displays in both the **Pending Decision** tab and the **Assign to Me** tab.

Request #	Vendor	Form	Status	Assigned	Decision
OBDXXTOV	Shivani_Supplier_New_1021	C_Supplier_Form - Clone Shivani 7/12	Pending Decision	HemanthK	Enter Decision Reassign
USFQM6X6	Supplier_SEM.1	C_Supplier_Form_C	Not Started	ExostarBuyer	Enter Decision Reassign
GOQZF4FO	Supplier_SEM.1	C_Supplier_Form_A	Pending Decision	ExostarBuyer	Enter Decision Reassign
AD0DZLMZ	Supplier_SEM.1	Clone1	Pending Decision	SubbalahAchappa	Enter Decision Reassign
TDHSEPEE	Supplier_SEM.1	Blue S1 Intake Form	Pending Decision	ExostarBuyer	Enter Decision Reassign

NOTE: You can select the **Reassign** link to reassign Buyer Approvers.

3. Select the **Approve** radio button. Enter **Approval Reason**. Click **Submit** to move the form to the Decision Complete tab.

NOTE: Once approved, no further action is required at this time.

Enter Decision

Current Approver: Hemanth K

Decision:

Approve

Reject

Reason

test

Cancel Submit

Reject Form

To reject a form:

1. Select **Approval Decision** from the left-hand menu.
2. Locate the desired form. Click the **Enter Decision** link.

NOTE: If **Approval Decision** has been assigned to you, the form displays in both the **Pending Decision** tab and the **Assign to Me** tab.

Request #	Vendor	Form	Status	Assigned	Decision
OBDXXTQV	Shivani_Supplier_New_1021	C.Supplier Form - Clone Shivani 7/12	Pending Decision	HemanthK	Enter Decision Reassign
USFQM6X6	Supplier_SEM_1	C.Supplier Form C	Not Started	ExostarBuyer	Enter Decision Reassign
GOOZF4FO	Supplier_SEM_1	C.Supplier Form A	Pending Decision	ExostarBuyer	Enter Decision Reassign
AD0DZLMZ	Supplier_SEM_1	Clone1	Pending Decision	SubbalahAchappa	Enter Decision Reassign
TDHSEPEE	Supplier_SEM_1	Blue S1 Intake_Form	Pending Decision	ExostarBuyer	Enter Decision Reassign

NOTE: You can select the **Reassign** link to reassign the Approval Decision.

3. Select the **Reject** radio button. Enter **Reject Reason**. Click **Submit** to send the form to the **Decision Complete** tab.

Enter Decision

Current Approver: Hemanth K

Decision:

Approve

Reject

Reason

test

Cancel

4. Navigate to the **Decision Complete** tab and locate the form. Click the **Resubmit** link.

NOTE: If no further action is needed, click **Mark Complete**.

Request #	Vendor	Form	Status	Assigned	Action
PHYWMRU0	Supplier SEM 1	QC3-NIST SP 800-171 - Standard	Approved	JoeyScarpulla	Assign Subscription
8NVP36PI	Supplier SEM 1	CR-003 (Standard) 27	Approved	SubbaiahAchappa	Assign Subscription
SVEXJYVW	Supplier SEM 1	Shruthi test form25	Rejected	SubbaiahAchappa	Resubmit Mark Complete
PLTCPZF7	Supplier SEM 1	Shruthi test form26	Approved	SubbaiahAchappa	Assign Subscription
EKXUVBLD	Supplier SEM 1	QC2-NIST SP 800-171 - Standard	Approved	JoeyScarpulla	Assign Subscription

5. Assign the desired user from the drop-down menu. Click **Resubmit** to send the form back to the Supplier for updates.

NOTE: Selecting **Resubmit** will move the form back to the Supplier's **Pending Forms** tab and it will go through the same cycle again.

Resubmit

Assign To User
Exostar Supplier

Cancel Resubmit

MANAGE SYSTEM EMAILS

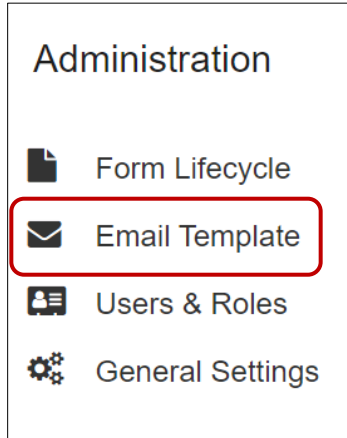
Functional Administrators and Technical Administrators can manage emails sent from OBM system, by updating and modifying content at any time. Every email sent from OBM has a template, and those templates are targeted for role-specific audiences (Buyer Admin, Supplier Admin, Buyer User).

Upon initial display of the **Email Template** page, all the current email's recipient information (To, CC, Subject Line, and Email Body Text) displays as default content. Administrators can edit this information as needed. All variables/fields in the email body (i.e. the values/parameters that can

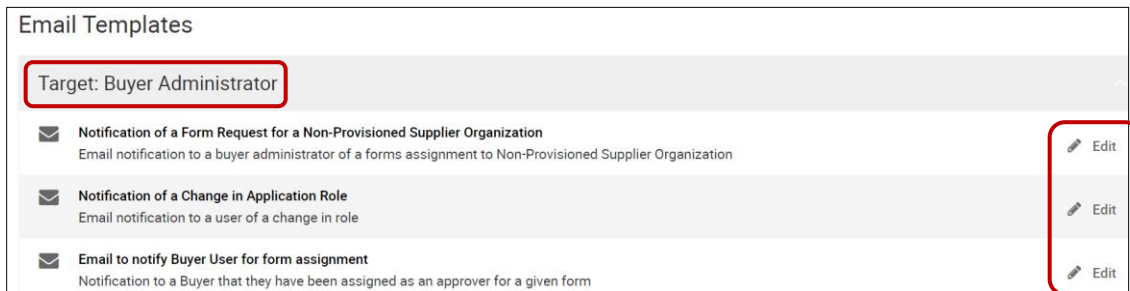
change per the email's context) are shown within brackets such as "[Variable Name]".

To modify email templates:

1. From the left-hand navigation on the Dashboard, click **Email Template** under the **Administration** section.



2. Navigate to the desired **Target** section. Click the **Edit** icon, located on the right side of the screen, for the desired email.



NOTE: The top portion of the template displays **Email Template Name**, **Current Version Number**, and **Last Updated Date**.

3. Drag and drop desired fields from the options provided along the left side of the screen, into the body of the HTML editor. Click **Save** to complete the update.

Template : Notification of a Form Request for a Non-Provisioned Supplier Organization (E013.130) - Last Updated : 11/02/2021

Available Fields

- Application URL
- Buyer Admin
- Buyer Admin Email
- ESD Number
- Event Destination
- Exostar ID
- Form Request Date
- Form Assignee
- Form Assignee Email
- Form Display Name
- Form Expiration Date
- Form Name

From: [System (Default)]

To: [Buyer Admin Email]

CC: supply chain technology@rlist.app ray.com; subbaiah.achappa@exostar.com;

Subject: Action Required: Provide Organization access to Raytheon SecureForms - (##SupplierName##) - ESD# (##ESDNumber##)

Description: Email notification to a buyer administrator of a forms assignment to Non-Provisioned Supplier Organization

Body

Dear (##BuyerAdmin##),

(##FormAssignee##) of (##SupplierName##), (##ESDNumber##) has been assigned the (##FormName##) by (##Requester##) (##RequesterEmail##). In order for the supplier to be able to access the Raytheon SecureForms application, the following action needs to be taken via the MAG Adoption Module.

Log in to Exostar's Managed Access Gateway (MAG) at <https://portal.exostar.com> and follow the standard process for inviting the organization and at least one user to the Raytheon Bundle. Use the existing Org ID if any.

Regards,
Raytheon Supply Chain

Save Cancel

NOTE: Every time an Administrator edits and saves an email template, the template is incremented to the next version.

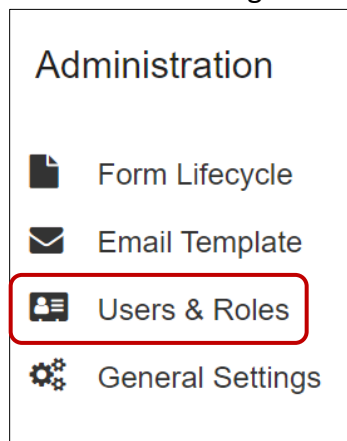
USER MANAGEMENT

Administrators can manage all users in OBM. This role can modify roles of any users, across all organization records in OBM, along with the ability to deactivate accounts. Functional Administrators can also set role definitions.

Modify User Role and Status

To modify a user's record:

1. Select **Users & Roles** from the left-hand navigation tree, under **Administration**.



- The system defaults to the **Manage Users** tab. To search for an organization, enter the **Organization Name** in the text box. All users for that organization display in list view. Click the tool icon next to the desired user.

The screenshot shows the 'Users & Roles' interface. At the top, there are two tabs: 'Manage Users' (selected) and 'Role Definitions'. Below the tabs is a search box for 'Organization' with the text 'SEM Buyer Org One' entered. Below the search box is a table with the following columns: Name, User ID, Email, Role, Provisioned, and Last Updated. The table contains three rows of user data. To the right of the table, there are three blue 'X' icons, one for each row, which are used to manage individual users.

Name	User ID	Email	Role	Provisioned	Last Updated
Ashleigh Howell	howella_0263@fis.evincibletest.com	Ashleigh.howell+_655@exostar.com	Buyer Technical Administrator	08/17/2021	11/09/2021
Hemanth Kanugolu	kanugolu_h_5273@fis.evincibletest.com	hemanth.kanugolu+_01@exostar.com	Buyer Functional Administrator	05/14/2021	10/19/2021
Subbaiah ba	bas_2033@fis.evincibletest.com	Subbaiah.achappa@exostar.com	Buyer Functional Administrator	10/12/2021	10/12/2021

- The **Role Management** pop-up displays. From this screen, update the user's roles or status. Click **Update**.

The screenshot shows the 'Role Management' pop-up dialog. It has a title bar with 'Role Management' and a close button 'X'. The dialog is divided into two sections: 'User roles' and 'User Status'. Under 'User roles', there are several radio button options: 'Buyer User', 'Buyer Functional Administrator', 'Buyer Technical Administrator' (selected), 'Buyer User with PII Permission', 'Adoption Administrator', and 'Super User'. Under 'User Status', there is a checked checkbox for 'Active'. At the bottom right, there are two buttons: 'Cancel' and 'Update'.

NOTE: If a user is deactivated in OBM, they are not deactivated in MAG. To remove a user from MAG, contact the organization's MAG Organization or OBM Application Administrator. If users are no longer with the company, their accounts should be removed from MAG, which removes them from OBM.

Set Role Definitions

Functional Administrators and Technical Administrators can modify existing role definitions, as well as create new role definitions. This essentially allows the administrator to modify role permissions.

Modify Existing Role Definitions

To modify existing role definitions:

1. Select **Users and Roles** from the left-hand navigation menu.
2. Navigate to the **Role Definitions** tab. Select the tool icon next to the desired role.

Users & Roles

Manage Users Role Definitions

ADD NEW ROLE DEFINITION

Role Name	Role Description	Users In Role	
Supplier User	Supplier User	14	✕
Supplier Administrator	Supplier Administrator	10	✕
Buyer User	Buyer User	2	✕
Buyer Functional Administrator	Buyer Functional Administrator	6	✕

3. Select or deselect **Permissions** as desired. Edit the **Audience** to change the role description, if desired. Click the **Update** button.

Permissions X

- Assign unassign any forms to users
- Edit All organization Forms
- Edit Forms assigned to Self**
- Manage User
- Reassign Forms which are Assigned to self**
- Submit Forms**
- Unlock Forms Assigned to Any User of their own organization
- Update roles for users of their own organization
- View / search Users of Your Own Org**
- View all Forms under DUNS Grouping**
- View Current Forms which have been**

Audience Supplier

Supplier User

Cancel Delete Update

NOTE: If you wish to delete the role, simply navigate to the **Permissions** prompt, and select the **Delete** button.

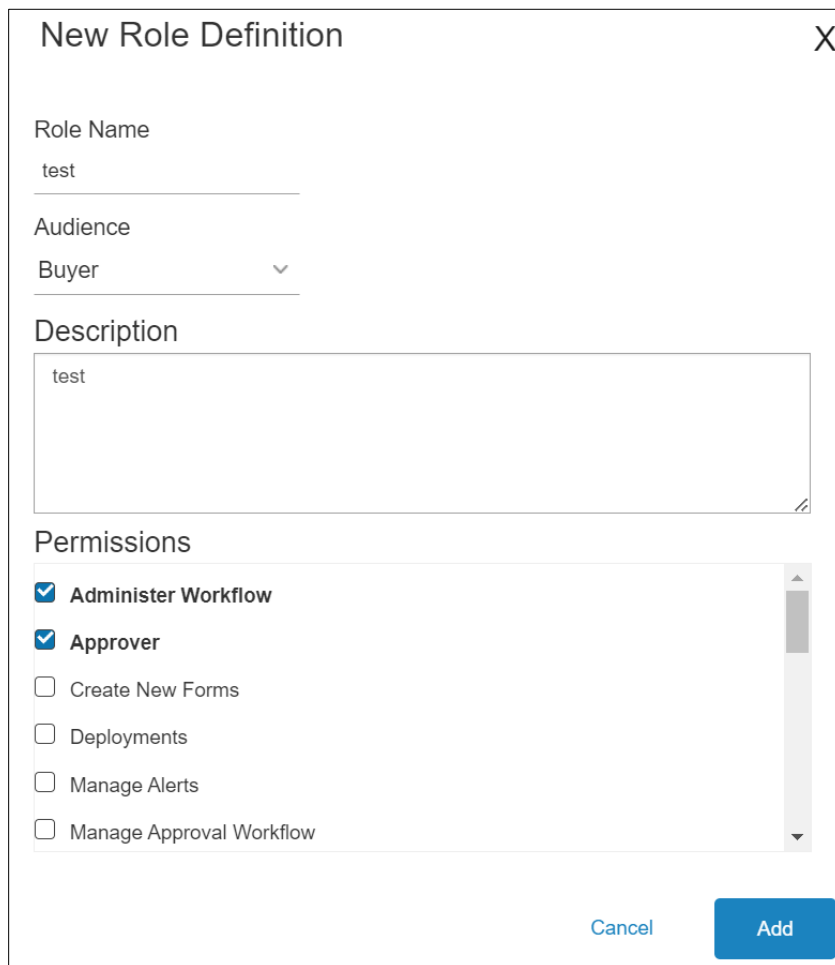
Create New Role Definitions

To create a new role definition:

1. Select **Users and Roles** from the left-hand navigation menu.
2. Navigate to the **Role Definitions** tab. Select the **ADD NEW ROLE DEFINITION** button.



3. Complete the **Role Name** field. Select from the **Audience** drop-down. Provide a **Description** and select **Permissions**. Click **Add**.



The screenshot shows a 'New Role Definition' dialog box with the following fields and options:






- Role Name:** A text input field containing the value 'test'.
- Audience:** A dropdown menu with 'Buyer' selected.
- Description:** A text area containing the value 'test'.
- Permissions:** A list of checkboxes with the following items:
 - Administer Workflow
 - Approver
 - Create New Forms
 - Deployments
 - Manage Alerts
 - Manage Approval Workflow

At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Add'.

GENERAL SETTINGS

General Settings is available from the left-hand menu and displays the following options:

Settings





 General Settings Description	 Banner Description	 Notification Description	 Appearance Description	 Attribute Configuration Description
--	--	--	--	---

General Settings

The General Settings selection provides the following editable features as well as their current values:

- **Email From Address:** This selection allows you to update the Email From Address.
- **Default Application Name:** This selection allows you to update the application name that displays in the top header.
- **Contact Us Email:** This selection allows you to update the Contact Us email address that displays in the top header.
- **MyExostar:** This selection allows you to update the myExostar link that displays in the top header.

General Settings

Name	Value	Action
Email From Address	noreply@exostar.com	 Edit
Default Application Name	Onboarding Module	 Edit
Contact Us Email	supply.chain.technology@rx.com	 Edit
MyExostar	https://www.myexostar.com/?ht_kb=onboarding-module-training-resources	 Edit





1 - 4 of 4 items

[BACK TO SETTING](#)

To edit any of the options:

1. Select the **Edit** icon in the **Action** column.

General Settings

Name	Value	Action
Email From Address	noreply@exostar.com	 Edit
Default Application Name	Onboarding Module	 Edit
Contact Us Email	supply.chain.technology@rx.com	 Edit
MyExostar	https://www.myexostar.com/?ht_kb=onboarding-module-training-resources	 Edit

1 - 4 of 4 items

[BACK TO SETTING](#)

2. Make desired changes. Click the **Update** button.

Manage General Settings

Default Application Name

Onboarding Module

[Update](#) [Cancel](#)

Banner

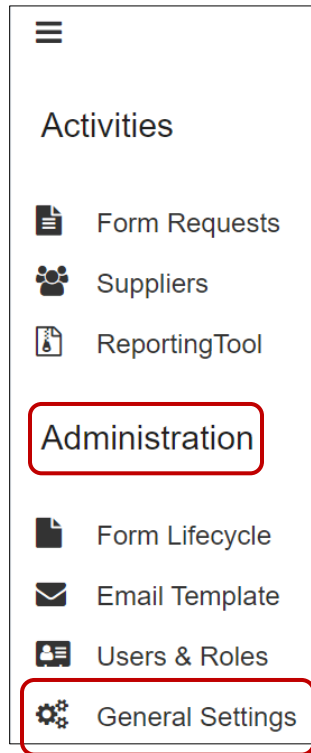
Depending on system permissions, Administrators can modify banner messages. There are two types of banners:

- **Site:** Displays announcements on the Supplier View.
- **Report:** Displays announcements in reporting.

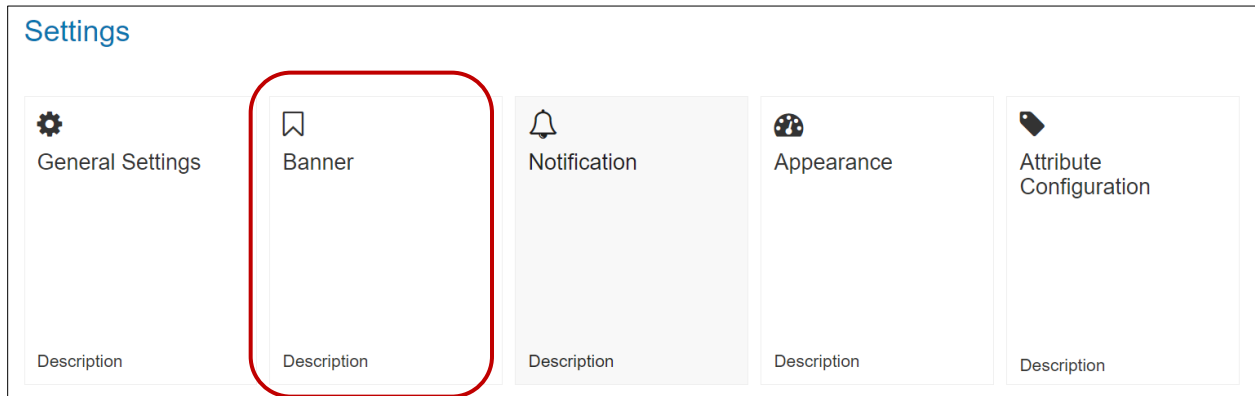
Modify Existing Banner

To modify existing banner messages:

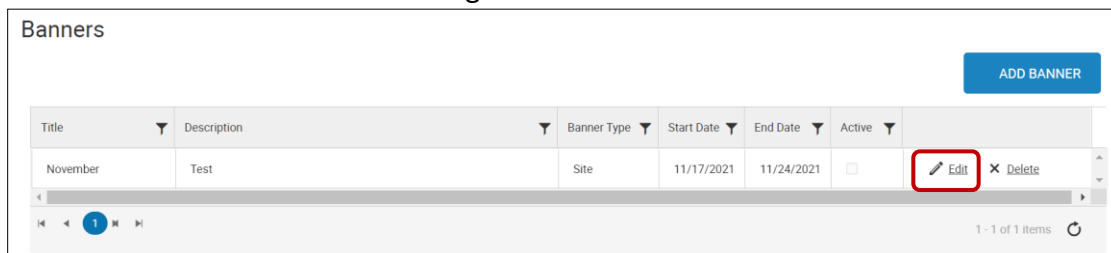
1. From the left-hand navigation, select the **General Settings** option under **Administration**.



2. Select **Banner**.



3. Locate the desired banner message and click the **Edit** icon.



NOTE: Select the **Delete** option to remove the banner completely.

4. Make all desired changes. Click **Save**.

Manage Banner

November

Test

BannerType Site Active No

Start Date 11/17/2021 End Date 11/24/2021

Save Cancel

Add New Banner

To create a new banner message:

1. From the left-hand navigation, select the **Banner** option under **Administration**. Click the **Add Banner** button.

Banners

ADD BANNER

Title	Description	Banner Type	Start Date	End Date	Active	
-------	-------------	-------------	------------	----------	--------	--

2. The **Manage Banner** screen displays. Add the **Title**, **Description**, **Start Date** and **End Date**, **Banner Type**, as well as **Active** drop-down. Click **Save**.

Manage Banner

My Banner

This is Test Banner

Start Date 10/28/2022 End Date 1/11/2023

BannerType Site Active Yes

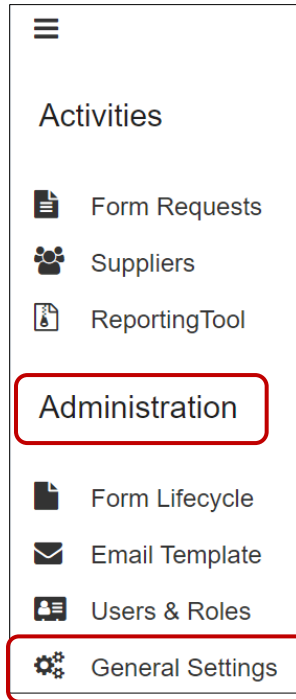
Save Cancel

Notification

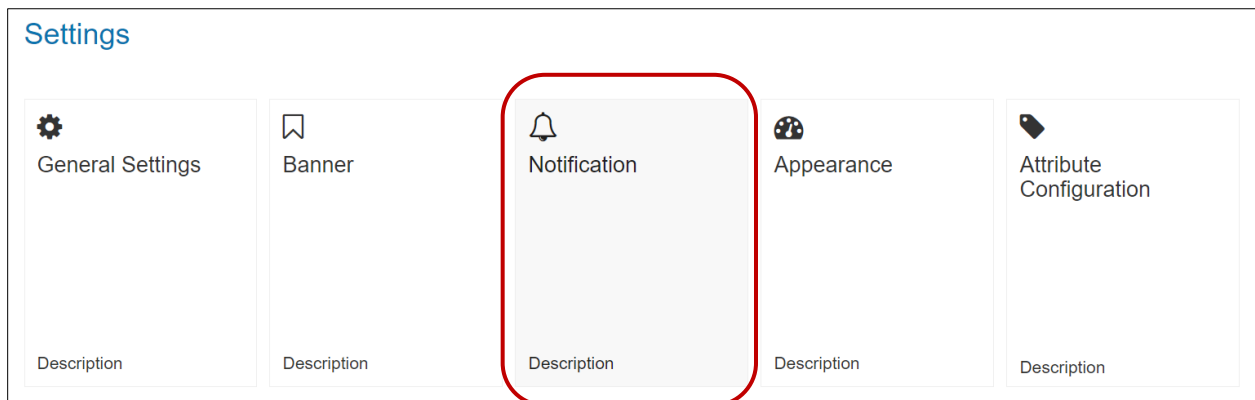
The Notifications section of the application is available from the **General Settings** page via the left-hand navigation menu. This allows you to set interval types, values, and reminder counts on some events. Notifications are used to send out email reminders, using a selected email templates (created in notifications) on specific configured internals on a given event

To navigate to and manage notifications:

1. Select **General Settings** from the left-hand navigation menu.



2. Select **Notification**.



3. Click **Edit** for the desired **Event**.

Event	Email Template	Allow Reminder	Interval Type	Interval Value	Reminder Count	Action
Form assigned to Supplier User	New Form Assignment Notification	<input checked="" type="checkbox"/>	Month	2	1	Edit
Form reassigned to someone else	Notification of Reassignment of a Form	<input type="checkbox"/>	NA	0	0	Edit
Form Completed	Confirmation Email for a Successfully Submitted Form	<input checked="" type="checkbox"/>	Day	0	0	Edit
Form Expiring	Notification of an Approaching Form Expiration Date	<input checked="" type="checkbox"/>	Day	10	3	Edit
Form Expired	Notification of an Expired Form	<input checked="" type="checkbox"/>	Day	100	1	Edit
Form Due	Email Reminder to Complete a Form	<input type="checkbox"/>	NA	0	0	Edit
Form Cancelled	Notification of Cancellation of a Form Request	<input type="checkbox"/>	NA	0	0	Edit

4. Deselect or select the **Allow Reminder** checkbox.
5. Select **Day**, **Week**, or **Month** from the **Interval Type** drop-down menu.
6. Select the **Interval Value** (day, week, month) and **Reminder Count** (total number of reminder emails sent out based on interval type/value). Click **Update**.

Manage Event Definition
✕

Event
Form assigned to Supplier User

Email Template
New Form Assignment Notification

Allow Reminder

Interval Type
Month

Interval Value
2

Reminder Count
1

Update
Cancel

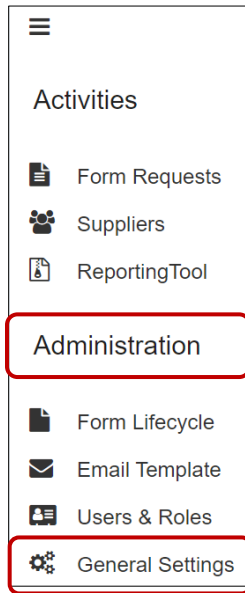
Appearance

The Appearance section is available from the General Settings page and allows end users to upload logo images, as well as customize links available from the dashboard.

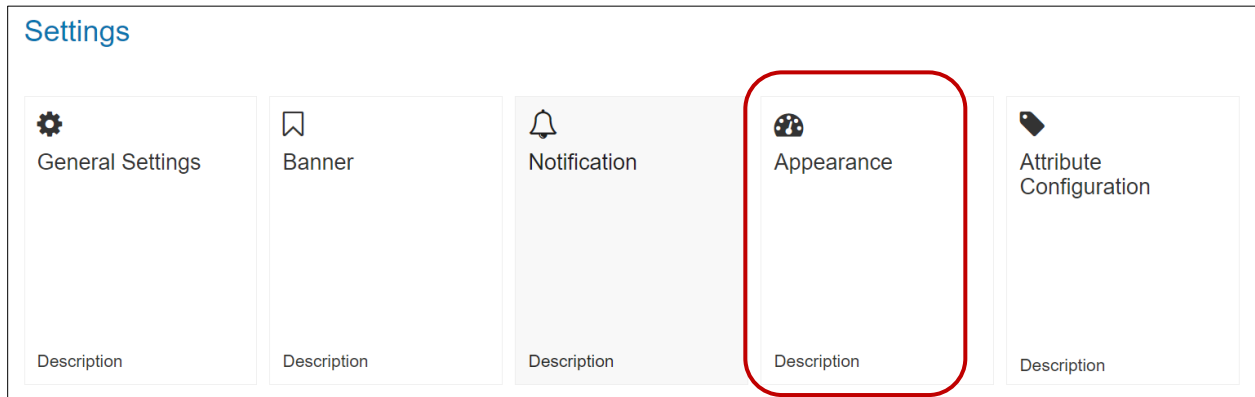
Upload Logo

To upload a logo image:

1. Select **General Settings** from the left-hand navigation.



2. Select the **Appearance** option.



3. On the **Uploading Logo** sub-tab, click **Select files...** and choose the desired file from your local drive. Click **Save**.

Appearance

Subtitle explains what users can do at this page. It can be only one line or two lines.

Uploading Logo Setting Up Links Two-Factor Configuration

Click the icon in the box below to upload a image file to change the logo on the header.

Select files... No File Selected

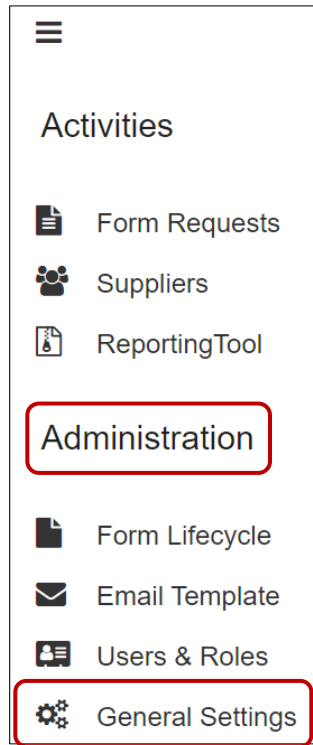
Image should be PNG/JPG format
At least 220x50 (1MB max)

CANCEL BACK TO SETTING SAVE

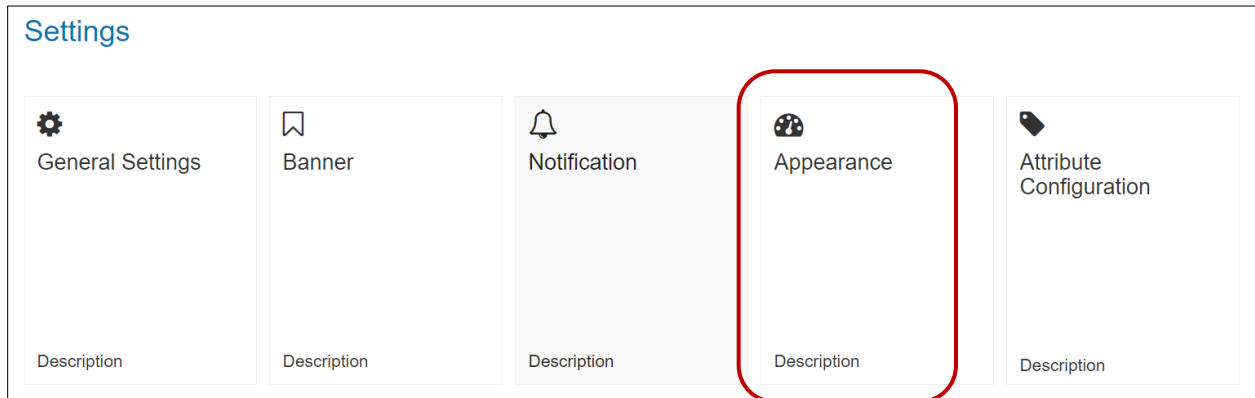
Customize Links

To customize the links displayed on the dashboard:

1. Select **General Settings** from the left-hand navigation.



2. Select the **Appearance** option.



3. Open the **Setting Up Links** sub-tab. Click the **Add Link** button.

Appearance

Subtitle explains what users can do at this page. It can be only one line or two lines.

Uploading Logo **Setting Up Links** Two-Factor Configuration

Please click '+ ADD LINK' button to set up links

+ ADD LINK

Link Display Name	Link	Link Position	Is Active	Action
RTX	https://www.rtx.com	1	<input type="checkbox"/>	i
LinkedIn	https://www.linkedin.com/	2	<input checked="" type="checkbox"/>	i
Raytheon Technologies Supplier Resources	https://www.raytheon.com/suppliers/supplier_resources	3	<input checked="" type="checkbox"/>	i
Raytheon Technologies Homepage	https://www.raytheon.com/	4	<input checked="" type="checkbox"/>	i

1 - 4 of 4 items


CANCEL [BACK TO SETTING](#) [SAVE](#)

4. Choose from the **Select a Link Position** drop-down.
NOTE: This determines the order in which the links display.

5. Enter the **Link Display Name** and **Link Address**. Click **Save**.

Add Links

Select a link position, enter a link name and link address. These links will be displayed on My Links on Supplier account like the image below.



Select A Link Position

Enter a Link display Name *

Enter A Link Address *

CANCEL [SAVE](#)

To manage existing links:

1. Locate the desired link and select or deselect the **Is Active** checkbox.
2. Select the **Action** option for the desired link to update name and address.

Appearance

Subtitle explains what users can do at this page. It can be only one line or two lines.

Uploading Logo Setting Up Links Two-Factor Configuration

Please click '+ ADD LINK' button to set up links

+ ADD LINK

Link Display Name	Link	Link Position	Is Active	Action
RTX	https://www.rtx.com	1	<input type="checkbox"/>	i
LinkedIn	https://www.linkedin.com/	2	<input checked="" type="checkbox"/>	i
Raytheon Technologies Supplier Resources	https://www.raytheon.com/suppliers/supplier_resources	3	<input type="checkbox"/>	i
Raytheon Technologies Homepage	https://www.raytheon.com/	4	<input checked="" type="checkbox"/>	i

◀ 1 ▶ 20 items per page 1 - 4 of 4 items ↻

CANCEL BACK TO SETTING SAVE

Two-Factor Configuration

This section allows you to configure required credentials to get into the Onboarding Module. This feature is not currently in service. We will add additional content when it is turned on.

Appearance

Subtitle explains what users can do at this page. It can be only one line or two lines.

Uploading Logo Setting Up Links Two-Factor Configuration

Two-Factor Configuration

Select Assurance Level and Credential Type.

-Select Assurance Level-

Assurance Level

level_4

◀ 1 ▶ 1 - 1 of 1 items ↻

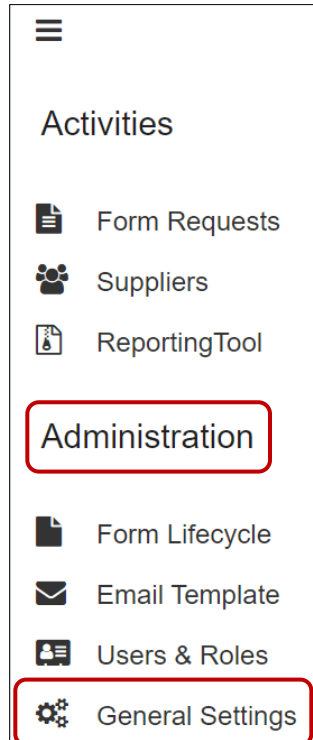
CANCEL BACK TO SETTING SAVE

Attribute Configuration

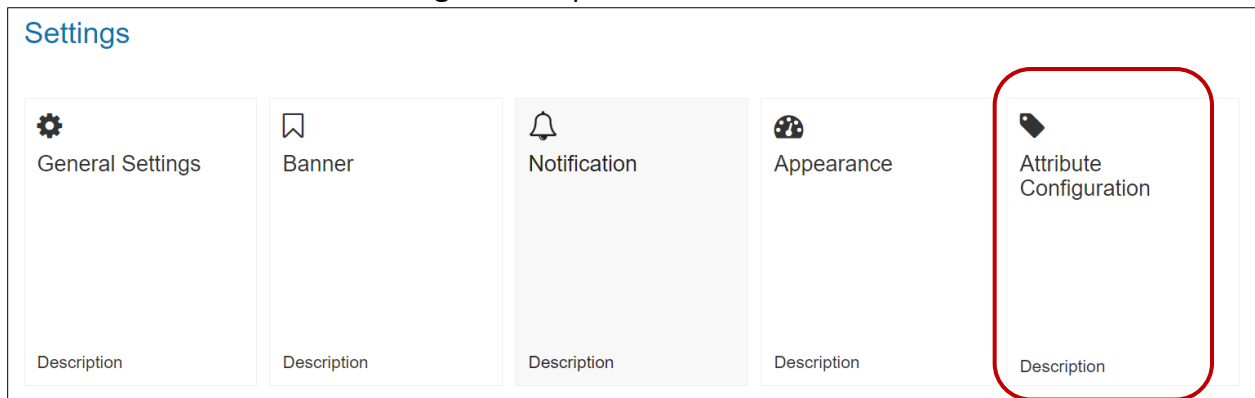
Users with permission to manage attributes can create Supplier Attributes, or groups. These Attributes can be used during the New Form Request process, when sending a single form to multiple Suppliers. If you are updating an existing Category/Attribute, you can begin this process on the Associate Attributes tab.

To create an Attribute Configuration:

1. Select **General Settings** from the left-hand navigation.



2. Select the **Attribute Configuration** option.



3. On the **Setup Attributes** tab, select an existing category to edit or delete, or select the **+CREATE NEW CATEGORY** button.

Attributes Configuration
Associate Supplier(s) with one or multiple attributes from the category chosen, or edit specific attributes.

Setup Attributes Associate Attributes

Create or Edit Category

Choose an existing Category to edit or create a new Category
select category

DELETE EDIT **+ CREATE NEW CATEGORY**

Create or Edit Attribute(s)

Associate existing Attribute(s) or create new Attribute(s)
select attribute

DELETE EDIT + CREATE NEW ATTRIBUTE(S)


4. Name the new category. Click **Save**.

Create or Edit a category.
Edit or create new categories and click 'SAVE' to make change.

Category:
Enter Category name*

CANCEL SAVE

5. A confirmation box displays. Click **Okay**.



Category 'Training Team Test' added successfully.

OKAY

6. Select an existing attribute to edit or delete or select the **+CREATE NEW ATTRIBUTE(S)** button.

NOTE: You cannot select an existing Attribute or create a new one if a Category is not selected.

Attributes Configuration
Associate Supplier(s) with one or multiple attributes from the category chosen, or edit specific attributes.

Setup Attributes | Associate Attributes

Create or Edit Category

Choose an existing Category to edit or create a new Category
Training Team Test

DELETE EDIT + CREATE NEW CATEGORY

Create or Edit Attribute(s)

Associate existing Attribute(s) or create new Attribute(s)
Select Attributes

DELETE EDIT + CREATE NEW ATTRIBUTE(S)

7. Name the new **Attribute**. Click **Save**.

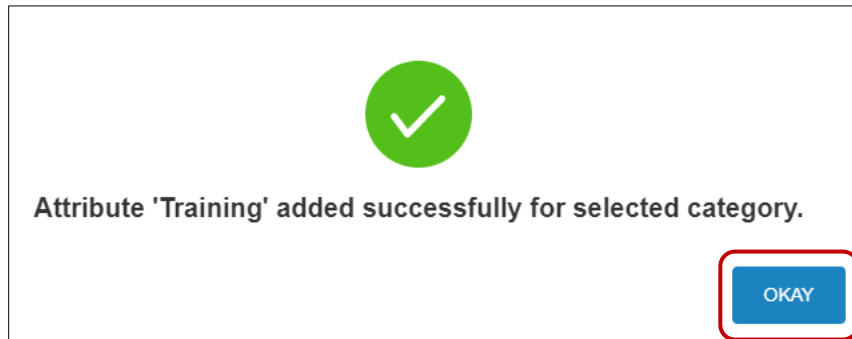
Create or Edit New Attribute(s).
Edit or create new attribute and click 'SAVE' to make change.

Selected Category
Training Team Test

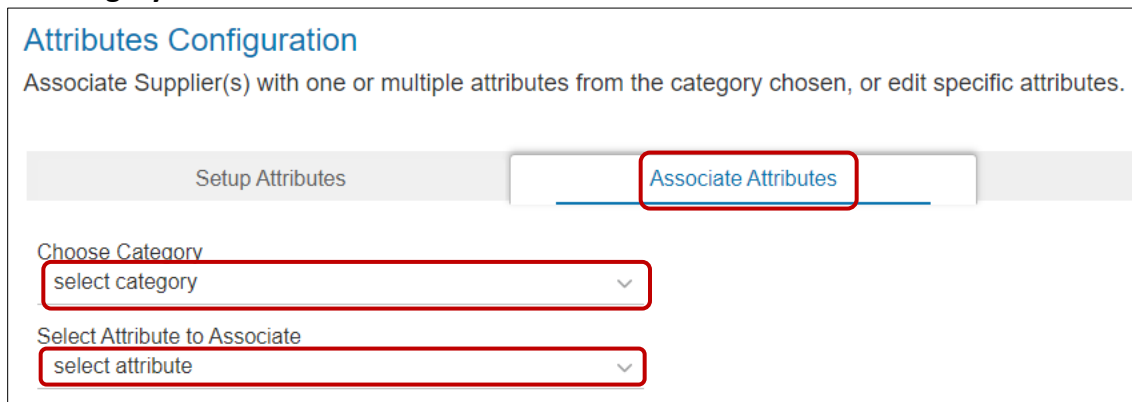
Attributes(s)
Training

CANCEL SAVE

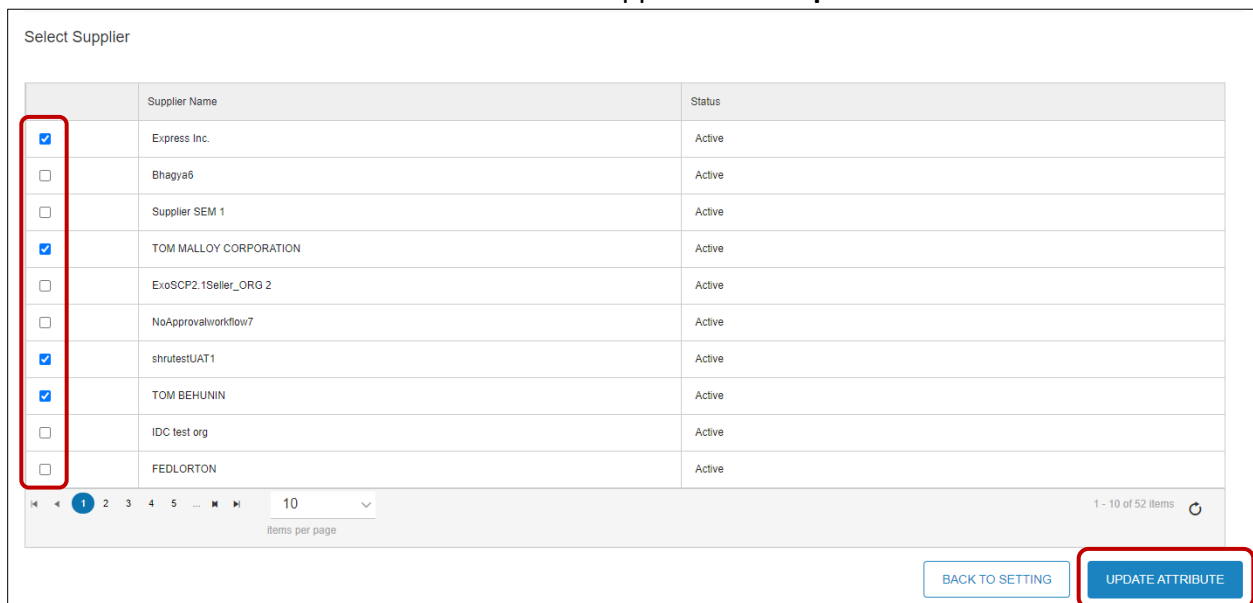
8. On the confirmation screen, click **Okay**.



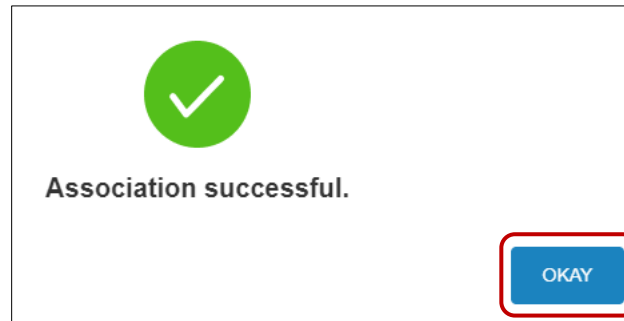
9. To add Suppliers to the Attribute, navigate to the **Associate Attributes** tab. Select the **Category**. Select the **Attribute**.



10. Place checkmarks next to the desired Suppliers. Click **Update Attribute**.



11. Click **Okay** in the confirmation box.



SUPPLIERS

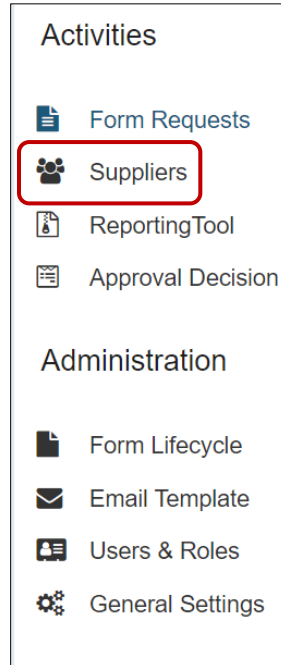
The Suppliers section of OBM allows you to search for existing suppliers in MAG, as well as add new suppliers. Only existing MAG Suppliers, who are not provisioned to OBM, can be invited.

IMPORTANT! To invite a Supplier to access OBM, a Buyer must have the Adoption Administrator role for the OBM application in MAG. Exostar must add this role to your user account. Please contact Exostar Customer Support to inquire about getting the Adoption Administrator role. Please see the [Adoption Module Invitation](#) section below for more information.

Supplier Search

Buyer users can search Exostar's MAG and SMD database for suppliers. To complete a search:

1. Select **Suppliers** from the left-hand navigation menu.



- On the **Supplier List** tab, enter the name of a supplier in the **Enter Organization** text area. Click the **Search** button to view the search results in the **Supplier Search** table.

Supplier List		Pending Invitations								
Search By										
<input checked="" type="radio"/> MAG <input type="radio"/> SMD <input type="checkbox"/> Save Selection										
Acme Corporation										Search
Filter										
										ADD SUPPLIER
Supplier Name	Provisioned	ExostarID	ExoOrgID	DUNS	City	State	Country	PostalCode	Action	
Acme Global Inc	N	111555028	EXO111555028		Herndon	Virginia	United States	20170	Invite	
Acme Microsystems	N	118190130	EXO118190130		herndon	Virginia	United States	20155	Invite	
Acme Steel	N	112953856	EXO112953856		Centreville	Virginia	United States	20120	Invite	
ACME MARKETS #7004	N	118539593	EXO118539593		MOORESTOWN	New Jersey	United States	8007	Invite	

Invite

From the Supplier Search page, buyer organizations can invite existing MAG suppliers to the Onboarding Module. To invite existing MAG suppliers:

- From the search results in the **Supplier Search** table, click the **Invite** button next to a non-provisioned supplier, where the **Provisioned** flag is **N**.

NOTE: If the Supplier is already provisioned to OBM, and the **Provisioned** flag is **Y**, the **Invite** button will be displayed in white instead of blue. You must use the MAG Adoption Module for

such an invitation. Also, invited suppliers have a clickable name to view their details. Please see the [Adoption Module Invitation](#) section below for more information.

Supplier List Pending Invitations

Search By

MAG SMD Save Selection

115707112 Clear Search

Wildcard search is by default and users should not enter *

Filter

ADD SUPPLIER

Supplier Name	Provisioned	TaxID	ExostarID	ExoOrgID	DUNS	City	State	Country	PostalCode	Action
Test_Org_UAT_519	N		115707112	EXO115707112		Aldie	Virginia	United States	20105	Invite

10 items per page 1 - 1 of 1 items

2. Review the supplier organization information on the **Organizational Details** screen. Input the **Supplier POC Email Address**. Click the **Next** button.

1 2 3 4 5

Add Organization Details

Provide your organization's address and business details.

Organization

115707112 Test_Org_UAT_519 Business Unit

Tax Id Duns Number shivani.chadha+_1201@exostar.com

Supplier POC Phone Number

Address

123 main st. Street2 Aldie

United States VA 20105

Cancel Next

3. On the **User Details** screen, check the existing user you want to invite, and you can also add a new user by clicking the **Add New User** button. Click **Next**.

NOTE: You cannot invite a user to a shell organization in MAG, which means there should be at least one user displayed on the **User Details** page.

Add/Select user(s) for the organization

You must have at least one user for the organization.
Once users are added, you can select the user(s) who will receive the form(s)

Users

	First Name	Last Name	Email Address	Action
<input checked="" type="checkbox"/>	Shivani	Chadha	shivani.chadha@exostar.com	
<input type="checkbox"/>	Subbalah	ba	subbalah.achappa+_03821@exostar.com	

20 items per page

No items to display

+ ADD A NEW USER

Cancel Previous Next

4. If a new user is also invited, add information about the user in the **Add New User** prompt. Click the **Add User** button.

Add User

First Name * Last Name *

Middle Name Email *

Phone Number Street1 *

Street2 City *

-- Select Country -- -- Select State --

Postal Code *

Close Add User

- Once all users have been added, place checkmarks next to the users you want to invite. Click **Next**.

Progress indicators: 1 (checkmark), 2 (active), 3, 4, 5

Add/Select user(s) for the organization

You must have at least one user for the organization. Once users are added, you can select the user(s) who will receive the form(s)

Users

	First Name	Last Name	Email Address	Action
<input checked="" type="checkbox"/>	Shivani	Chadha	shivichadha@gmail.com	

Items per page: 20 | 1 - 1 of 1 items

+ ADD A NEW USER

Cancel | Previous | **Next**

- Type in the **Form Name** in the field provided. Click **Add**.

- Select the user in the **Assign a user...** drop-down. Click **Next**.

Progress indicators: 1 (checkmark), 2 (checkmark), 3 (active), 4, 5

Select the form(s) you want to send

Type the form names you want to send, then select from the menu. You can choose upto 25 forms.

Shivani_Test_Form

Assign a user for all selected form(s)

Shivani Chadha

Cancel | Previous | **Next**

8. Select the **Yes** to **Enable Approval Workflow**. Select **No** to NOT Enable Approval Workflow. Select **Yes** or **No** to determine the same set of Approvers, if you have added multiple forms. If enabled, assign a Buyer Approver. Click **Next**.

Approval workflow

Do you wish to enable workflow approvals ?

Yes No

Do you wish to set same approvers for all of the selected forms?

Yes No

All selected forms

Form 0
Standard Form NIST SP 800-171-smoke uat

Form 1
WG-Common Questionnaire-VIP-2-bhagya

Workflow approval enabled

Type the approver names you want to add, then select from the menu.
You can select up to 5 approvers.

Select

ShivaniChadha x

Cancel

Previous Next

9. Verify data input. Click **Submit**.

Review

Please review the summary below. Click 'PREVIOUS' to navigate back and make changes.

User Details

User(s) Name	Email Address
Shivani Chadha	shivani.chadha@exostar.com

Form and User Selection

Form Name	User
Standard Form NIST SP 800-171-smoke uat, WG-Common Questionnaire-VIP-2-bhagya	Shivani Chadha

Workflow Approval

Workflow	Form Name	Approver Name
<input checked="" type="checkbox"/>	Standard Form NIST SP 800-171-smoke uat, WG-Common Questionnaire-VIP-2-bhagya	ShivaniChadha

Cancel

Previous Submit

Add New Supplier

From the Supplier Search page, buyer organizations can invite existing MAG suppliers to the Onboarding Module. To invite existing MAG suppliers:

- From the search results in the **Supplier Search** table, click the **Invite** button next to a non-provisioned supplier.

NOTE: If the Supplier is already provisioned to OBM, the **Invite** button will be displayed in white instead of blue. You must use the MAG Adoption Module for such an invitation. Also, invited suppliers have a clickable name to view their details.

The screenshot shows the 'Supplier List' tab with search filters set to 'MAG'. A search for '115707112' has been performed. The table below shows the search results:

Supplier Name	Provisioned	TaxID	ExostarID	ExoOrgID	DUNS	City	State	Country	PostalCode	Action
Test_Org_UAT_519	N		115707112	EXO115707112		Aldie	Virginia	United States	20105	Invite

The 'Invite' button in the 'Action' column is highlighted with a red box. Below the table, there are pagination controls showing '10 items per page' and '1 - 1 of 1 items'.

- Review the supplier organization information on the **Organizational Details** screen. Input the **Supplier POC Email Address**. Click the **Next** button.

The screenshot shows the 'Add Organization Details' screen. The form is titled 'Add Organization Details' and includes the instruction 'Provide your organization's address and business details.' The form is divided into 'Organization' and 'Address' sections.

Organization Section:

- ExostarID: 115707112
- ExoOrgID: Test_Org_UAT_519
- Business Unit: Business Unit
- Tax Id: Tax Id
- Duns Number: Duns Number
- Supplier POC Email Address: shivani.chadha+_1201@exostar.com
- Supplier POC Phone Number: Supplier POC Phone Number

Address Section:

- Street: 123 main st.
- Street2: Street2
- City: Aldie
- Country: United States
- State: VA
- Postal Code: 20105

The 'Next' button at the bottom right is highlighted with a red box.

5. On the **User Details** screen, check the existing user you want to invite, and you can also add a new user by clicking the **Add New User** button. Click **Next**.

NOTE: You cannot invite a user to a shell organization in MAG, which means there should be at least one user displayed on the **User Details** page.

Add/Select user(s) for the organization

You must have at least one user for the organization.
Once users are added, you can select the user(s) who will receive the form(s)

Users

	First Name	Last Name	Email Address	Action
<input checked="" type="checkbox"/>	Shivani	Chadha	shivani.chadha@exostar.com	
<input type="checkbox"/>	Subbaiah	ba	subbaiah.achappa+_03821@exostar.com	

20 items per page

No items to display

+ ADD A NEW USER

Cancel Previous **Next**

6. If a new user is also invited, add information about the user in the **Add New User** prompt. Click the **Add User** button.

Add User ✕

First Name * Last Name *

Middle Name Email *

Phone Number Street1 *

Street2 City *

-- Select Country -- -- Select State --

Postal Code *

Close

7. Once all users have been added, place checkmarks next to the users you want to invite. Click **Next**.

Add/Select user(s) for the organization

You must have at least one user for the organization.
Once users are added, you can select the user(s) who will receive the form(s)

Users

	First Name	Last Name	Email Address	Action
<input checked="" type="checkbox"/>	Shivani	Chadha	shivichadha@gmail.com	<input type="checkbox"/> <input type="checkbox"/>

20 items per page 1 - 1 of 1 items

Cancel

8. Type in the **Form Name** in the field provided. Click **Add**.

9. Select the user in the **Assign a user...** drop-down. Click **Next**.

✔ —✔ —3 —4 —5

Select the form(s) you want to send

Type the form names you want to send, then select from the menu. You can choose upto 25 forms.

Shivani_Test_Form Add

Assign a user for all selected form(s)

Shivani Chadha ▼

Cancel Previous Next

10. Select the **Yes** to **Enable Approval Workflow**. Select **No** to NOT Enable Approval Workflow. Select **Yes** or **No** to determine the same set of Approvers, if you have added multiple forms. If enabled, assign a Buyer Approver. Click **Next**.

Approval workflow

Do you wish to enable workflow approvals ?

Yes No

Do you wish to set same approvers for all of the selected forms?

Yes No

All selected forms

Form 0
Standard Form NIST SP 800-171-smoke uat

Form 1
WG-Common Questionnaire-VIP-2-bhagya

Workflow approval enabled

Type the approver names you want to add, then select from the menu.
You can select up to 5 approvers.

Select

ShivaniChadha x

Cancel

Previous Next

11. Verify data input. Click **Submit**.

Review

Please review the summary below. Click 'PREVIOUS' to navigate back and make changes.

User Details

User(s) Name	Email Address
Shivani Chadha	shivani.chadha@exostar.com

Form and User Selection

Form Name	User
Standard Form NIST SP 800-171-smoke uat, WG-Common Questionnaire-VIP-2-bhagya	Shivani Chadha

Workflow Approval

Workflow	Form Name	Approver Name
<input checked="" type="checkbox"/>	Standard Form NIST SP 800-171-smoke uat, WG-Common Questionnaire-VIP-2-bhagya	ShivaniChadha

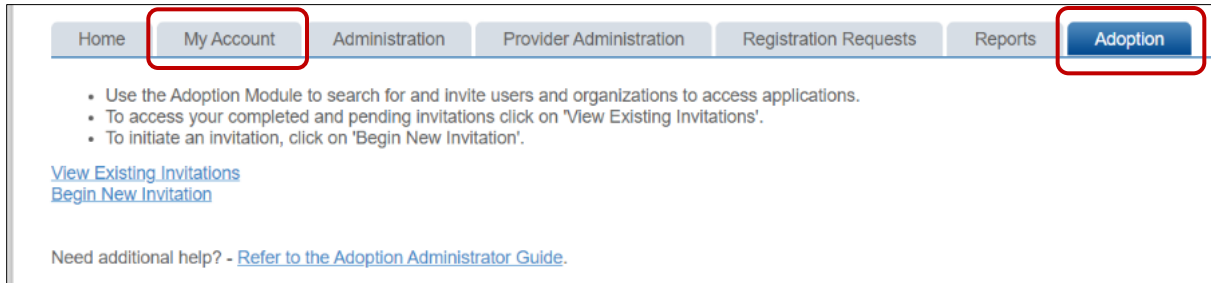
Cancel

Previous Submit

Adoption Module Invitation

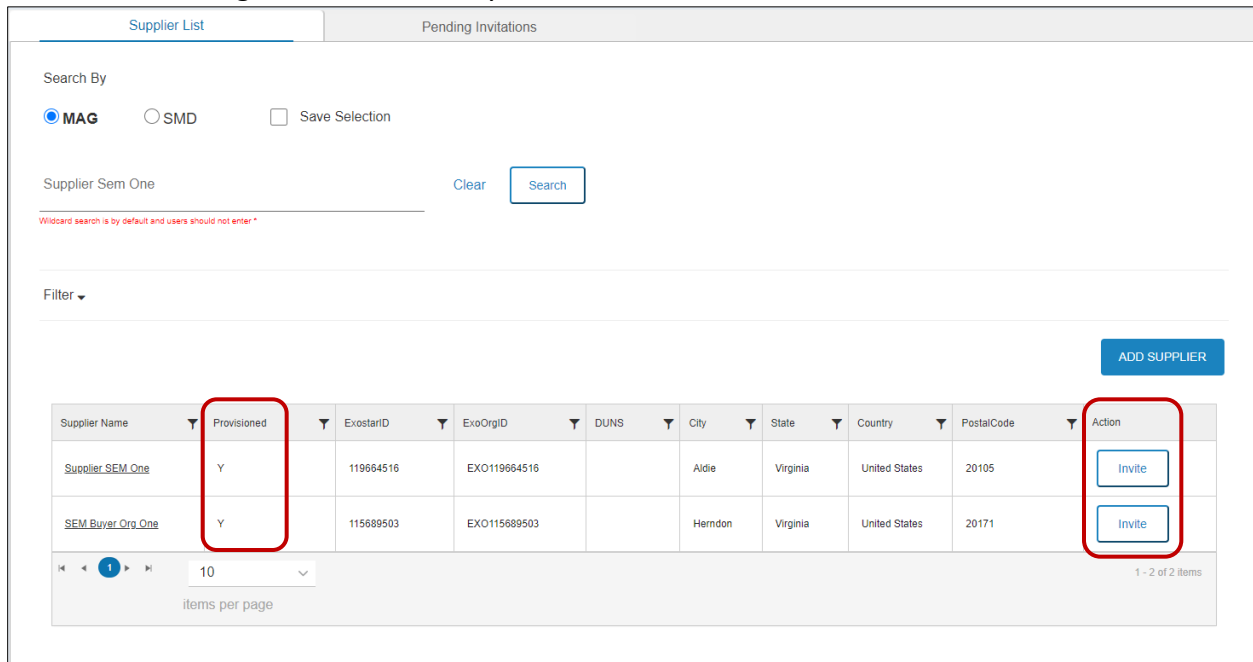
This section outlines scenarios when OBM cannot be used for invitations and Buyers must invite via the MAG Adoption Module.

IMPORTANT! To invite a Supplier to access OBM, a Buyer must have the Adoption Administrator role for the OBM application in MAG. Exostar must add this role to your user account. To verify you have this role, navigate to the My Account tab or view the Adoption tab. Please contact Exostar Customer Support to inquire about getting the Adoption Administrator role.



Scenario 1: Existing Org, Subscribed to OBM, Add New User

For this scenario, when a search is performed, the **Provisioned** flag is **Y** and **Invite** button is white. This means the organization is already subscribed to OBM.



To invite a user to this organization, the Buyer must:

1. Navigate to <https://portal.exostar.com> and complete the MAG login.

2. Select the **Adoption** tab. Click the **Begin New Invitation** link.

Home My Account Administration Provider Administration Registration Requests Reports **Adoption**

- Use the Adoption Module to search for and invite users and organizations to access applications.
- To access your completed and pending invitations click on 'View Existing Invitations'.
- To initiate an invitation, click on 'Begin New Invitation'.

[View Existing Invitations](#)
[Begin New Invitation](#)

Need additional help? - [Refer to the Adoption Administrator Guide.](#)

3. Click the **Search Organizations** button.

Search Organizations Add Organization

User Search

Email Address or User ID is required to perform a search

Email Address :

OR

User Id :

4. Input the **Organization Name** or **Exostar ID**, and as many details as necessary to locate the desired organization. Click **Search**. Select the hyperlinked **Org Name** in the search results.

• An Organization Name, Exostar ID, External Organization ID, DUNS Number, or US Federal Tax ID Number is required to search for an organization.
 • Use more than one search criterion to narrow down your results.
 • Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Search

Organization Name: Exostar ID:

US Federal Tax ID Number:

Address 1: Address 2:

City: State/Province:
 (Enter ISO two character values, e.g., NY for New York)

Country: Zip/Postal Code:

External Source Name: SEM1 External Organization ID:

Search Clear Cancel

• Please review the search results carefully.
 • In an effort to avoid duplication, you should only proceed with creating a new organization if you are certain that the organization does not already exist.

Results per page: 25

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RIDP Status	List of Active Apps	List of Pending Apps
HK Org wonteng Tuscany, VA 20171, UNITED STATES	EXO081473710	081473710		Active	N/A	N/A		

5. The **Organization Summary** page displays. In the **Actions** section, select **Invite New User**.

Supplier SEM One - Org Summary

Organization Summary

MAG Information

Actions

[Invite Organization](#)

[Invite new user](#)

[Close](#)

6. Input all required fields for **User Profile Information** section.

User Profile information

Title:

* First Name:

Middle Name:

* Last Name:

* Email Address:

* Confirm Email Address:

Job Title:

* Phone:

Fax:

* Address 1:

Address 2:

* City:

* State/Province:
(Enter ISO two character values, e.g., NY for New York)

Zip/Postal Code:

* Country:

Timezone:

Invitation Information

7. In the **Invitation Information** section, place a checkmark for the **Onboarding Module** application. Click **Next**.

8. Review the data input. Click **Submit** to complete adding the user.

Subscribe User to Application	Assign Application Administrator Role to User	Subscribe Organization to Application
Onboarding Module	Yes	Yes

NOTE: If you invite an existing MAG user (same email address attached to an existing user account), MAG displays a duplicate account soft warning. A Buyer can still submit and proceed with the invitation.

- The email address shivani.chadha@exostar.com already exists in MAG. You may proceed with your invitation, however, this will create a duplicate account for this user.
 - Review the details of the invitation for the selected user. To return to the previous page and make changes to the invitation, click the 'Cancel' button.
 - Need additional help? - Refer to the [Adoption Administrator Guide](#)

Invitation Information

As the Adoption Administrator, you receive a notification once the user completes their invitation. The company's Organization Administrator also receives a notification alerting them the user is subscribed to an application.

Scenario 2: Existing Org Subscribed to OBM, Invite Existing User

This scenario works under the assumption that the organization exists in MAG and is currently subscribed to OBM. The user exists in MAG as well but is not currently subscribed to OBM. To complete this invitation scenario:

- Navigate to <https://portal.exostar.com> and complete the MAG login.

2. Select the **Adoption** tab. Click the **Begin New Invitation** link.

Home My Account Administration Provider Administration Registration Requests Reports **Adoption**

- Use the Adoption Module to search for and invite users and organizations to access applications.
- To access your completed and pending invitations click on 'View Existing Invitations'.
- To initiate an invitation, click on 'Begin New Invitation'.

[View Existing Invitations](#)
[Begin New Invitation](#)

Need additional help? - [Refer to the Adoption Administrator Guide.](#)

3. Input user's **Email Address** or **MAG User ID**. Click **Search**.

4. From the search results, select the desired hyperlinked **Last Name**.

Search Organizations Add Organization

User Search

Email Address or User ID is required to perform a search

Email Address :

OR

User Id :

First Name : (Optional)

Last Name : (Optional)

Search Clear Cancel

Results per page: 25

Last Name	First Name	Last MAG Access Date	User ID	Email Address	Organization Name	Organization ID	External Organization ID	External User ID	MAG Status	FIS Assurance Level
Chadha	Shivani	Mar/27/2024	chadhas_4782	shivani.chadha@exostar.com	Exostar Test / Internal QA Test	EXO109701334			Active	Medium HW

5. Under **Invitation Information**, place a checkmark next to **Onboarding Module**. Click **Next**.

Invitation Information

Applications	Application Name	Sponsor Codes	Application Administrator
<input checked="" type="checkbox"/>	Onboarding Module	<input type="text"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Phone OTP	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Hardware OTP	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Exostar Mobile ID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	International Phone OTP	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Proofing Required	<input type="checkbox"/>	<input type="checkbox"/>

* External Source Name: OMHII The External Source Name identifies the partner issuing the invitation. It is required in order to enter an External User ID and External Organization ID. [Get more information on External Source Names here.](#)

External User ID: External User ID is a unique identifier used by your organization for this user.

External Organization ID: External Organization ID is a unique identifier used by your organization for this user.

External Organization ID, External User ID, and Sponsor Code are all optional fields. For help with these fields, [view more information.](#)

Message to User (to be included in email notification):

I am inviting on behalf of:

Next Cancel

6. Click **Save**.

Organization Subscriptions

Applications: Application Name

Onboarding Module – Aerojet Rocketdyne

Save Cancel

Scenario 3: Shell Orgs with NO Organization Administrator

This scenario occurs when you search for an organization in OBM, you fill in the POC, and the user list page displays zero users listed in the organization. You cannot proceed in OBM and must use the Adoption Module.

Add/Select user(s) for the organization

You must have at least one user for the organization.
Once users are added, you can select the user(s) who will receive the form(s)

Users

First Name	Last Name	Email Address	Action
No records available.			

20 items per page No items to display

+ ADD A NEW USER

Cancel Previous Next

IMPORTANT! If a user IS listed, you can proceed in OBM.

To proceed add a user to the shell account:

1. Navigate to <https://portal.exostar.com> and complete the MAG login.
2. Select the **Adoption** tab. Click the **Begin New Invitation** link.

Home My Account Administration Provider Administration Registration Requests Reports **Adoption**

- Use the Adoption Module to search for and invite users and organizations to access applications.
- To access your completed and pending invitations click on 'View Existing Invitations'.
- To initiate an invitation, click on 'Begin New Invitation'.

[View Existing Invitations](#)
Begin New Invitation

Need additional help? - [Refer to the Adoption Administrator Guide.](#)

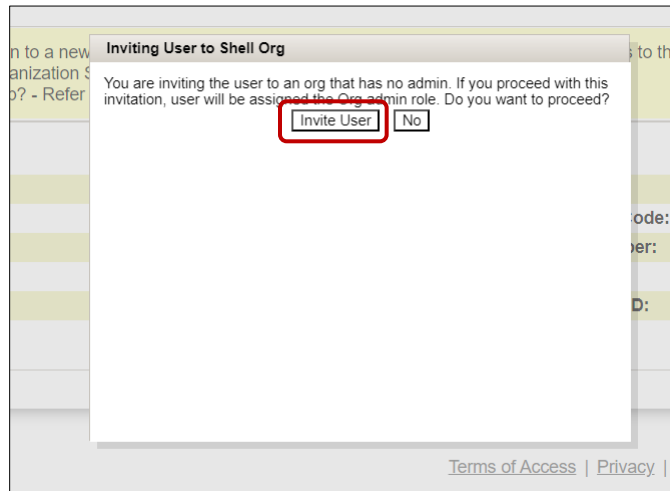
3. Click the **Search Organizations** button.

4. Input the **Organization Name** or **Exostar ID** (remove EXO), and as many details as necessary to locate the desired organization. Click **Search**. Select the hyperlinked **Org Name** in the search results.

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RIDP Status	List of Active Apps	List of Pending Apps
HK Org wondergg Tuscany, VA 20171, UNITED STATES	EXO081473710	081473710		Active	N/A	N/A		

5. The **Organization Summary** page displays. In the **Actions** section, select **Invite New User**.

- Since this organization does not currently have a user, a message displays notifying you this user will be assigned the Organization Administrator role. If you wish to proceed, click the **Invite User** button.



- Input all required fields for **User Profile Information** section.

A screenshot of a web application form titled "User Profile Information". The form contains several input fields and dropdown menus. The fields are: "Title" (dropdown menu with "Please Select..." selected), "* First Name" (text input), "Middle Name" (text input), "* Last Name" (text input), "* Email Address" (text input), "* Confirm Email Address" (text input), "Job Title" (text input), "* Phone" (text input), "Fax" (text input), "* Address 1" (text input), "Address 2" (text input), "* City" (text input), "* State/Province" (text input with a note "(Enter ISO two character values, e.g., NY for New York)"), "Zip/Postal Code" (text input), "* Country" (dropdown menu with "Please Select..." selected), and "Timezone" (dropdown menu with "America/New_York" selected). The form is divided into two sections: "User Profile Information" and "Invitation Information".

8. In the **Invitation Information** section, place a checkmark for the **Onboarding Module** application. Click **Next**.

9. Review the data input. Click **Submit** to complete adding the user.

NOTE: If you invite an existing MAG user (same email address attached to an existing user account), MAG displays a duplicate account soft warning. A Buyer can still submit and proceed with the invitation.

- The email address shivani.chadha@exostar.com already exists in MAG. You may proceed with your invitation, however, this will create a duplicate account for this user.
 - Review the details of the invitation for the selected user. To return to the previous page and make changes to the invitation, click the 'Cancel' button.
 - Need additional help? - Refer to the [Adoption Administrator Guide](#)

Invitation Information

As the Adoption Administrator, you receive a notification once the user completes their invitation. The company’s Organization Administrator also receives a notification alerting them the user is subscribed to an application.

Track Invitations

As an Adoption Administrator, you can track invitations sent by you or other Adoption Administrators for the same application to which you are assigned. To track invitations:

1. Navigate to <https://portal.exostar.com> and complete the MAG login.

2. Select the **Adoption** tab. Click the **View Existing Invitations** link.

Home My Account Administration Provider Administration Registration Requests Reports **Adoption**

- Use the Adoption Module to search for and invite users and organizations to access applications.
- To access your completed and pending invitations click on 'View Existing Invitations'.
- To initiate an invitation, click on 'Begin New Invitation'.

[View Existing Invitations](#)
[Begin New Invitation](#)

Need additional help? - [Refer to the Adoption Administrator Guide.](#)

3. Select the desired search criteria. Click **Search**.

4. Select the hyperlinked **Request ID** to view the invitation.

Track Invitations

Request Type: My Pending Invitations
Search By: Organization Name
Search For: Dummy
Search

Results per page: 25

Request ID	Invitee	Email Address	Adoption Administrator First Name	Adoption Administrator Last Name	External Source Name	External Organization ID	External User ID	Status	Date Submitted	Date Completed
d25a1139-491f451f-bac8-7e44d6122547	Dummy one Org		Shivani	Chadha	SEM1			Pending	01 Apr, 2024 01:25 PM EDT	

Invitation Status

Invited: An email is sent to the user to accept the invitation. Until they accept, and before the 30-day expiration, this status displays. This invitation type can be deleted.

Org Invitation Detail (REF:d25a1139-491f-451f-bac8-7e44d6122547) User : Shivani Chadha (chadhas_0251)

[Back](#) **Delete Invitation**

Organization Summary

Organization Name: Dummy one Org
Address 1: 2329 Dulles Corner Blvd
City: Herndon
Zip/Postal Code: 20171
DUNS Number:
External Source Name: SEM1

Organization ID: EXO113703715
Address 2:
State/Province: VA
Country: UNITED STATES
MAG Status: Invited
External Organization ID:

Invitation Status

Invitation Status: Invited
Date Completed:
Date Submitted: 01 Apr, 2024 01:25 PM EDT
Adoption Administrator: Shivani Chadha

Organization Application Details

Application Name	Status	Notes
Supplier Evaluation Manager N1	Invited	

User Details

Email Address	Application Name	Primary Contact	Action
shivani.chadha+_1@exostar.com	Supplier Evaluation Manager N1		View Details

Expired: If the supplier does not accept the invitation in 30 days, the invitation expires and displays this status. You can delete and re-issue a new invitation in this case.



Supplier In Process: This status displays when the supplier acknowledges the invite. Please note, after this step, the invitation cannot be deleted.

Pending Exostar Approval: The organization is pending a DPL check. Please note, only a few organizations go through DPL checks.

Completed EPA Approval: The invitation is complete, and the user has been sent an **Account Activation** email.