



# Exostar Secure Access Manager (SAM) User Guide

June 2020



## CONTENTS

<b>DOCUMENT VERSIONS</b> .....	<b>4</b>
<b>INTRODUCTION</b> .....	<b>5</b>
THE OVERVIEW OF EXOSTAR'S SECURE ACCESS MANAGER PLATFORM.....	5
TYPES OF ORGANIZATIONS AND USERS IN SAM PLATFORM.....	5
<i>Organization-Managed Organization (OMO)</i> .....	5
<i>Sponsor-Managed Organization</i> .....	6
<i>Exostar-Managed Organization</i> .....	6
<i>Types of Users in SAM</i> .....	7
<b>BASIC FUNCTIONS</b> .....	<b>8</b>
LOGIN TO YOUR EXOSTAR SAM PLATFORM ACCOUNT.....	8
<i>How to Activate your Account</i> .....	8
<i>How to Login to the Exostar SAM Platform</i> .....	11
<i>How to Recover My Password – Security Questions</i> .....	13
<i>How to Recover My Password – Phone OTP</i> .....	16
<i>How to Recover My Password – Email OTP</i> .....	19
<i>How to Recover My Password - Exostar Mobile ID (Powered by Authy™)</i> .....	22
<i>How to Reset an Expired Password – Security Questions</i> .....	24
<i>How to Reset an Expired Password – Exostar Mobile ID (Powered by Authy™)</i> .....	26
EXOSTAR SAM PLATFORM PORTAL.....	27
<i>The Home Tab</i> .....	28
<i>The My Account tab</i> .....	29
<b>APPLICATION ACCESS</b> .....	<b>30</b>
<b>ACCOUNT MANAGEMENT BY USER</b> .....	<b>31</b>
EDIT PROFILE.....	31
<i>How to Edit My Profile</i> .....	31
<i>Shared Users</i> .....	32
VIEW ORGANIZATION DETAILS .....	33
CHANGE EMAIL .....	34
<i>How to Change the Email Address Associated with my Account</i> .....	34
CHANGE PASSWORD.....	35
<i>How to Change Your Password</i> .....	35
CHANGE SECURITY QUESTIONS .....	36

<i>How to Update Your Security Questions</i> .....	36
ONE TIME PASSWORD (OTP).....	37
<i>Identity Proofing</i> .....	37
<i>US-Based User Proofing: Experian Proofing</i> .....	37
<i>International-Based User Proofing – Webcam Proofing</i> .....	39
<i>OTP Registration and Management</i> .....	41
<i>How to Register your OTP Credential</i> .....	42
<i>Phone OTP Credential</i> .....	43
<i>Exostar Mobile ID Credential</i> .....	44
<i>Login with Registered Credential</i> .....	44
<i>OTP Hardware</i> .....	44
<i>Phone OTP</i> .....	44
<i>Exostar Mobile ID</i> .....	46
<i>OTP Management</i> .....	47
ACCOUNT DISABLEMENT.....	48
USER SELF REGISTRATION .....	50

**DOCUMENT VERSIONS**

<b>Version</b>	<b>Impacts</b>	<b>Date</b>	<b>Owner</b>
SAM 4.0	<ul style="list-style-type: none"><li>• Changed the product name from IAM to MAG</li><li>• Updated the text and screenshots for the new login and authentication flow (in the "Login to your Exostar SAM Platform Account" section).</li><li>• Updated the SOTP Client Administrators section</li></ul>	July 2019	Ajay Ejantkar
SAM 4.1	<ul style="list-style-type: none"><li>• Updated Activation Workflow</li><li>• Create Password Workflow</li><li>• Authentication Workflow</li><li>• Updated Footer</li><li>• Announcement Banner</li></ul>	March 2020	Payal Mahensaria

## INTRODUCTION

This guide is intended to introduce users to the Secure Access Manager (SAM) solution and its processes.

### Application Overview

Exostar's Secure Access Manager (SAM) Platform is a consolidated portal used for account registration, authentication, and management. The authentication gateway supports secure authentication, and provides access to applications and services hosted by Exostar and those managed by external entities.

The objective of the SAM Platform is to consolidate registration processes for connecting partners and applications in a secure environment, while providing flexible management and invitation capabilities to application owners.

### Key Platform Features:

- Our platform extends the basic concept of web-based Single-Sign-On (SSO) to support the single sign-on location to multiple applications.
- It supports authentication credentials of varying assurance levels.
- It facilitates an organizational approach to registration, account management, and application access.
- It provides organizations with the tools to add new users and grant access to applications.

### Types of Organizations and Users in SAM Platform

The Exostar SAM Platform manages the following types of organizations: Organization-Managed Organizations, Exostar-Managed Organizations, and Sponsor-Managed Organizations. Users from Sponsor-Managed Organizations can transform into "Shared Users," if they begin to access applications that do not belong to their sponsor. Read below to understand the difference between these types of organizations.

#### Organization-Managed Organization (OMO)

An **Organization-Managed Organization** in SAM refers to an organization that is responsible for managing itself. The Org Admin accepts the Terms and Conditions on behalf of the organization members. The organization manages and administers their own users. Org-managed organization is the only model that will permit establishing SSO / Federated access for their users. To sum up, an Organization-Managed Organization will have all of the below features:

- It is self-managed
- Organization is responsible for all users in the organization
- Org Admin accepts T & Cs
- Typically larger organizations with established IT expertise
- Pre-requisite for establishing SSO / Federated connection

## Sponsor-Managed Organization

A **Sponsor-Managed Organization** is an organization registered in Exostar's SAM Platform and managed by the Sponsor. Members of this organization are the responsibility of the Sponsor. The Organization Administrator will accept the Terms and Conditions on behalf of the users within this organization. As long as users access sponsor applications exclusively, the Sponsor's Admin will have full control over these users. However, once a user subscribes to a non-sponsor app, the sponsor's admin will stop having full admin control over the user, but will continue administering their organization-specific applications. Shared Users will need to accept Terms and Conditions only once, after subscribing to their first non-sponsor application.

To sum up, a Sponsor-Managed Organization will have these features:

- This organization is registered & managed by the Sponsor
- The Sponsor is responsible for all non-sponsor users in the organization
- Sponsor Org Admin/MPA accepts T & Cs for applications that belong to the Sponsor-Managed Organization
- Users become shared once subscribed to a non-sponsor application

## Exostar-Managed Organization

An **Exostar-Managed Organization** in SAM is an organization that is managed by Exostar. Users within Exostar-Managed organizations accept user-level Terms and Conditions, but they only need to be accepted once. Adding additional applications will not require users to accept additional terms and conditions again. This type of organization is intended for independent users of the system, who may not belong to a particular organization, and who may need access to multiple sponsor applications. For example, clinical investigators would belong to this type of organization.

An Exostar-Managed Organization has all the below features:

- It is registered and managed by Exostar
- Users accept T & Cs only once, after subscribing to their first application
- Typically, it includes independent users who do not belong to a particular organization
- These users need access to multiple sponsor applications

- Users need to be added to an organization by Exostar, the Sponsor Inviter API, or Adoption Module Administrator.

### Types of SAM Users

The tables below provide the information about users by the type of their organization and role designation within SAM:

**Table A: Users by the Type of Organization (OMO/SMO/EMO)**

Organization Type	User Type
Organization Managed Organization ( <b>OMO</b> )	Internal Employees
Sponsor Managed Organization ( <b>SMO</b> )	Non-Employee External Users, Partners, Suppliers (users can access applications across sponsors while still belonging to an "Organization")
Exostar Managed Organization ( <b>EMO</b> )	Individual Users (users can access applications across sponsors but DO NOT belong to an "Organization")

**Table B: User Roles in SAM**

Role	OMO	SMO	EMO
User	X	X	
Organization Administrator (OA) (Scope: Limited to Their Organization)	X	X	
Management Portal Administrator (MPA) (Scope: Limited to Tenancy; a Tenancy could include multiple Organizations)	X	X	
Service Provider Administrator (SPA) (Scope: Limited to Their Applications)	X	X	X

Exostar Portal Administrator* (EPA) (Scope: Full Admin Capability)	X	X	X
---	---	---	---

\*EPAs are Exostar employees that have full admin control over users of all Org Types.

## BASIC FUNCTIONS

### Login to your SAM Platform Account

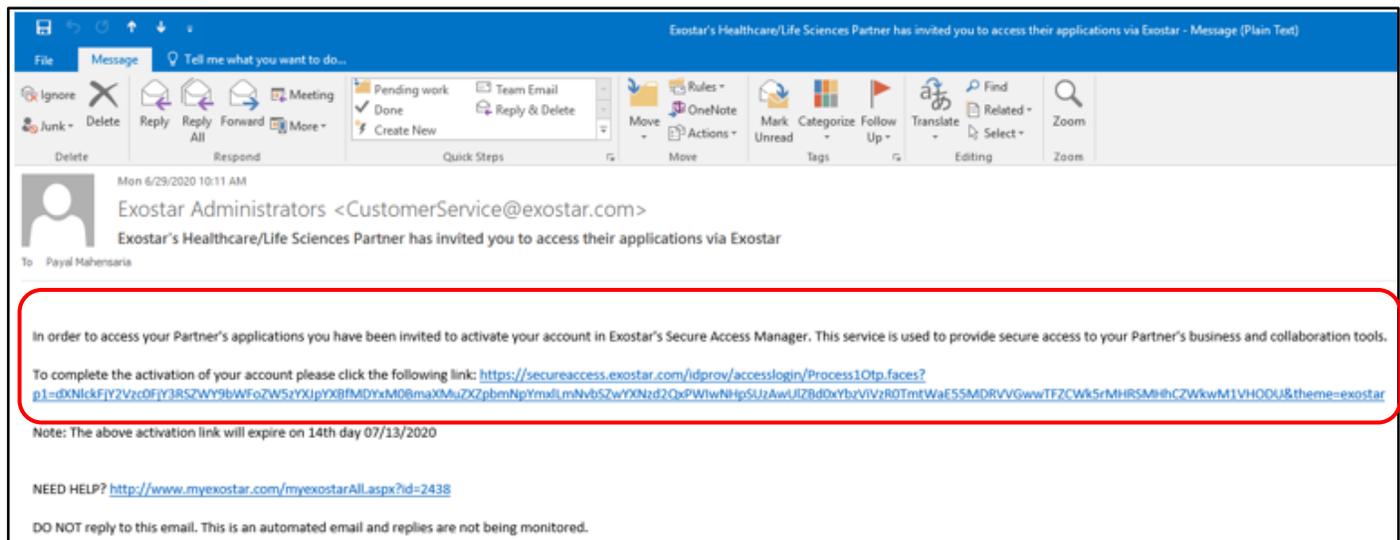
Whether logging into Exostar’s SAM Platform for the first time, returning to the portal, or logging in via EAG, you can access the portal at <https://secureaccess.exostar.com>.

### How to Activate your Account

Upon creation of your SAM Platform account, you receive an email notification containing an activation link. The account activation email is resent twice every 30 days, and new activation notifications supersede older activation emails. Account activation must be completed within 180 days, or the account is deleted. After you begin using your account, you are asked to change your password every 90 days.

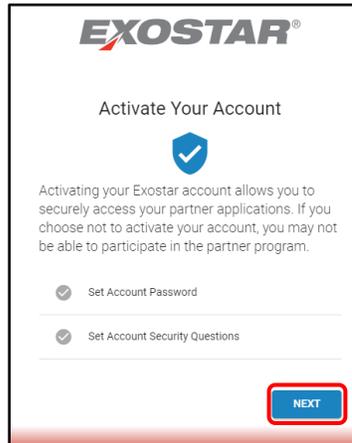
Follow the steps below to activate your account:

1. In the activation email, click the **Activation Link**:



**NOTE:** If you do not use the link in the email to initiate the process, but instead choose to enter your email address on the Exostar SAM Platform login screen, you are prompted to select captcha in order to resend the activation email.

2. You are directed to the SAM activation screen. Click **Next**.



**EXOSTAR®**

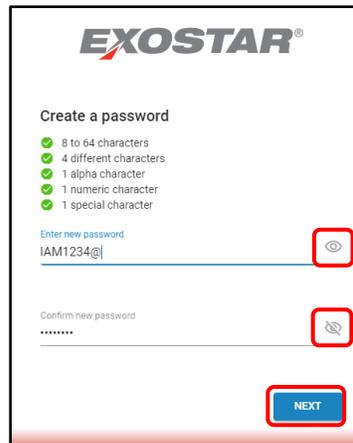
### Activate Your Account

Activating your Exostar account allows you to securely access your partner applications. If you choose not to activate your account, you may not be able to participate in the partner program.

- Set Account Password
- Set Account Security Questions

**NEXT**

3. Review the password requirements. Create and confirm your password. Click **Next** to proceed. Passwords expired every 90 days.



**EXOSTAR®**

### Create a password

- 8 to 64 characters
- 4 different characters
- 1 alpha character
- 1 numeric character
- 1 special character

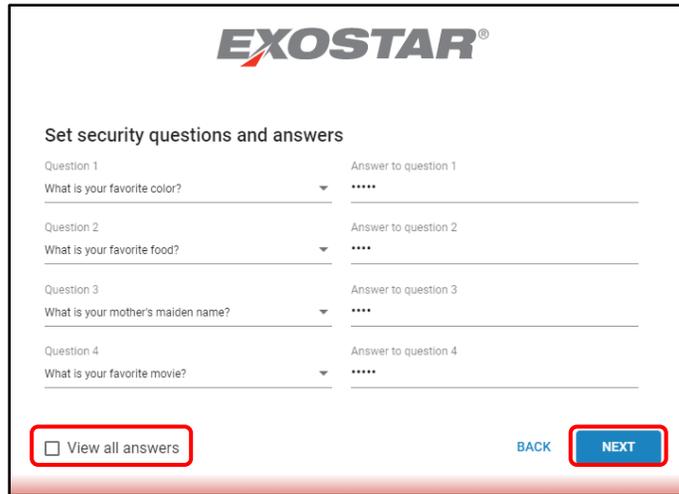
Enter new password  
IAM1234@|

Confirm new password  
\*\*\*\*\*

**NEXT**

**NOTE:** Select the **Eye** icon to view password input.

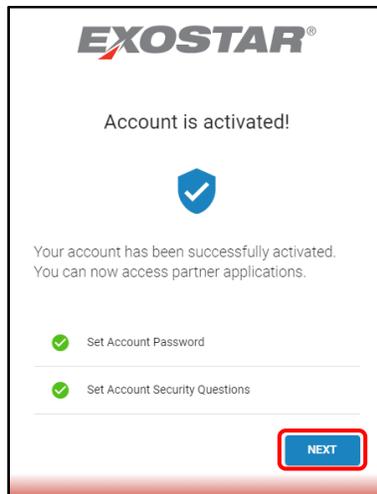
4. Set your security questions and answers. Click **Next**.



The screenshot shows the EXOSTAR logo at the top. Below it is the heading "Set security questions and answers". There are four questions listed, each with a dropdown menu for the question and a text input field for the answer. The questions are: "What is your favorite color?", "What is your favorite food?", "What is your mother's maiden name?", and "What is your favorite movie?". At the bottom left, there is a checkbox labeled "View all answers" which is currently unchecked. At the bottom right, there are two buttons: "BACK" and "NEXT". The "NEXT" button is highlighted with a red border.

**NOTE:** Select the **View all answers** check box to view answer input.

5. Account activation confirmation displays. Click **Next** to proceed to the SAM portal.

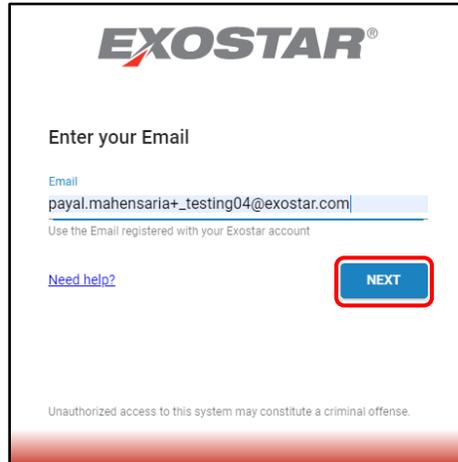


The screenshot shows the EXOSTAR logo at the top. Below it is the heading "Account is activated!". There is a blue shield icon with a white checkmark. Below the icon, the text reads: "Your account has been successfully activated. You can now access partner applications." There are two green checkmarks followed by the text "Set Account Password" and "Set Account Security Questions". At the bottom right, there is a blue button labeled "NEXT" which is highlighted with a red border.

## How to Login to the Exostar SAM Platform

Once you have completed your first-time login and established your password and security questions, all subsequent **Logins to Exostar SAM Platform** will be as follows:

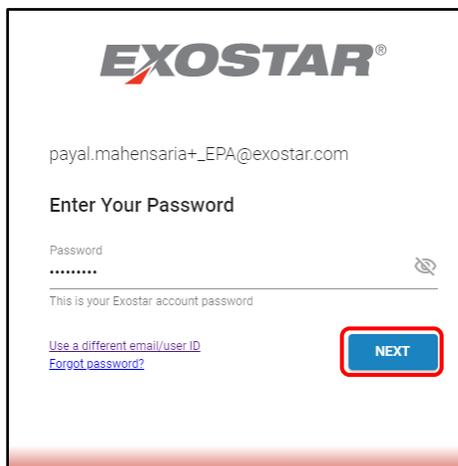
1. Go to the Exostar SAM Platform login portal: <https://secureaccess.exostar.com>.
2. Enter your Email. Click **Next**.



The screenshot shows the Exostar login portal. At the top is the EXOSTAR logo. Below it, the text 'Enter your Email' is displayed. There is an 'Email' input field containing the text 'payal.mahensaria+\_testing04@exostar.com'. Below the input field, it says 'Use the Email registered with your Exostar account'. There is a blue link for 'Need help?' and a blue button labeled 'NEXT' which is highlighted with a red box. At the bottom, there is a small disclaimer: 'Unauthorized access to this system may constitute a criminal offense.'

SSO/EAG users have a cookie installed to their browser, which redirects them to their organization Remote Identity Provider (R-IDP). If you delete the cookie or use a different browser, entering the email address redirects you to the proper R-IDP.

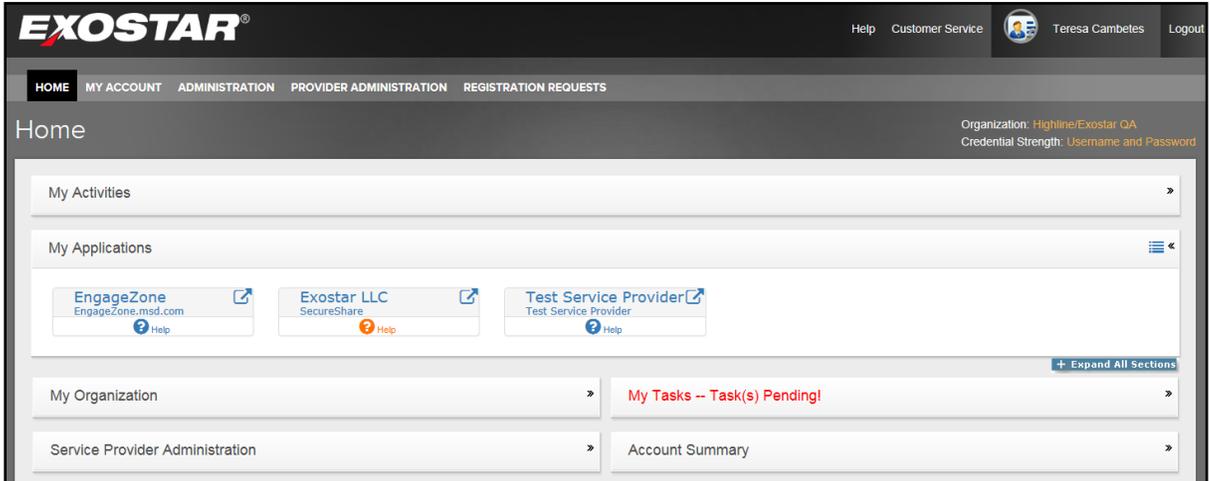
3. Enter your password, and click **Next**.



The screenshot shows the Exostar login portal. At the top is the EXOSTAR logo. Below it, the email address 'payal.mahensaria+\_EPA@exostar.com' is displayed. The text 'Enter Your Password' is shown above a password input field. The password field contains several dots and has a visibility icon (an eye) to its right. Below the password field, it says 'This is your Exostar account password'. There are two blue links: 'Use a different email/user ID' and 'Forgot password?'. A blue button labeled 'NEXT' is highlighted with a red box.

**NOTE:** If the system recognizes your credential has not been activated, you are prompted to resend the activation email.

4. Upon successful login, the Exostar SAM Platform **Home** tab displays. From this tab, you can launch active applications or review organization information. Click the application in the **My Applications** section to launch it.

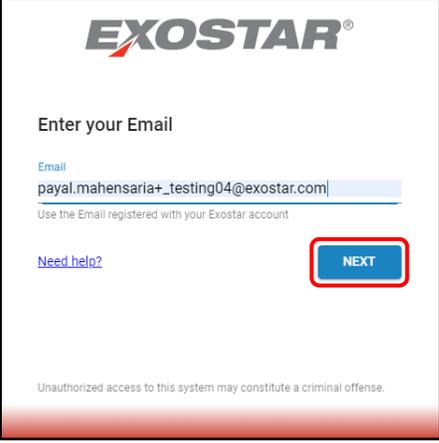


**NOTE:** In some cases, you may be presented with *Terms and Conditions* during your first access to the application. Please contact Exostar Customer Service for more information.

## How to Recover My Password – Security Questions

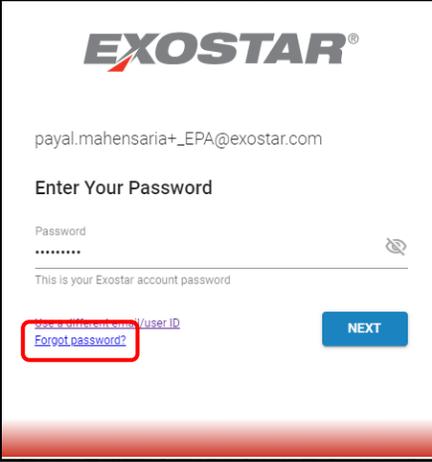
Follow the steps below to reset your password:

1. Log into your Exostar SAM Platform account by navigating to <https://secureaccess.exostar.com> . Enter your Email address, and click **Next**.



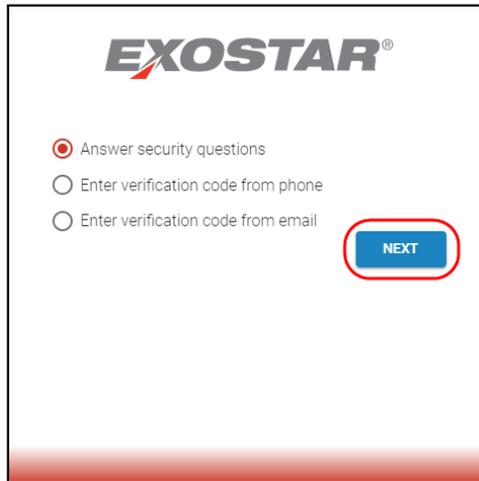
The screenshot shows the Exostar login interface. At the top is the EXOSTAR logo. Below it, the text "Enter your Email" is displayed. There is an input field for the email address containing "payal.mahensaria+\_testing04@exostar.com". Below the input field, it says "Use the Email registered with your Exostar account". There is a blue link "Need help?" and a blue button labeled "NEXT" which is highlighted with a red box. At the bottom, there is a small disclaimer: "Unauthorized access to this system may constitute a criminal offense."

2. Click the **Forgot Password** link.



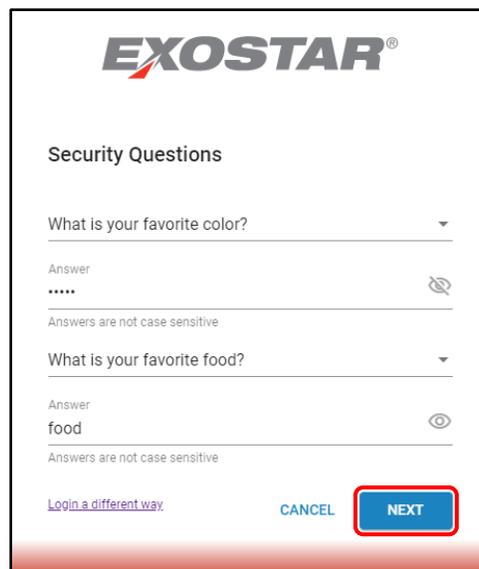
The screenshot shows the Exostar password entry interface. At the top is the EXOSTAR logo. Below it, the email address "payal.mahensaria+\_EPA@exostar.com" is displayed. The text "Enter Your Password" is shown above a password input field with masked characters "\*\*\*\*\*" and a visibility icon. Below the password field, it says "This is your Exostar account password". There is a blue link "Forgot password?" which is highlighted with a red box, and a blue button labeled "NEXT". At the bottom, there is a small disclaimer: "Unauthorized access to this system may constitute a criminal offense."

3. Select **Answer security questions**, and click **Next**.



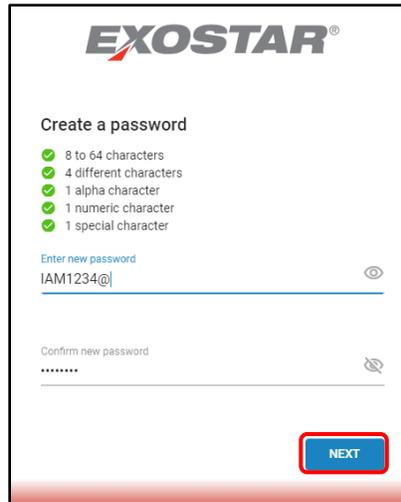
The screenshot shows the EXOSTAR logo at the top. Below it are three radio button options: "Answer security questions" (which is selected), "Enter verification code from phone", and "Enter verification code from email". To the right of these options is a blue button labeled "NEXT" with a red border.

4. From the pull-down menu, select and answer two of your security questions. Click **Next**.



The screenshot shows the EXOSTAR logo at the top. Below it is the heading "Security Questions". There are two questions, each with a pull-down menu and an answer field. The first question is "What is your favorite color?" with a pull-down arrow and an answer field containing ".....". The second question is "What is your favorite food?" with a pull-down arrow and an answer field containing "food". Below the questions are two "Answers are not case sensitive" labels. At the bottom left is a link "Login a different way". At the bottom right are two buttons: "CANCEL" and "NEXT" (which is highlighted with a red border).

5. Enter your new password, confirm it, and then click **Next**.



The screenshot shows the EXOSTAR password creation screen. At the top is the EXOSTAR logo. Below it, the text "Create a password" is followed by four green checkmarks indicating password requirements: 8 to 64 characters, 4 different characters, 1 alpha character, 1 numeric character, and 1 special character. There are two input fields: "Enter new password" with the text "IAM1234@|" and "Confirm new password" with asterisks. A blue "NEXT" button is at the bottom right.

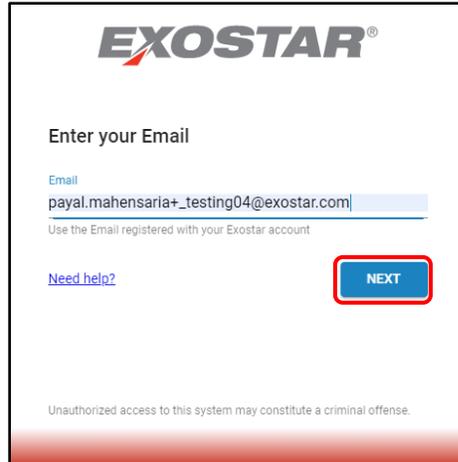
**Reminder:** Passwords must be minimum 8 and maximum 64 characters long. They must include at least 4 different characters, 1 alphabetic character, 1 number, and 1 special character. Leading and trailing spaces are not allowed. Passwords will expire after 90 days.

6. Upon successful password change, the Exostar SAM Platform **Home** tab will display. From this tab, you can launch active applications or review organization information. Click the application in the **My Applications** section to launch it.

## How to Recover My Password – Phone OTP

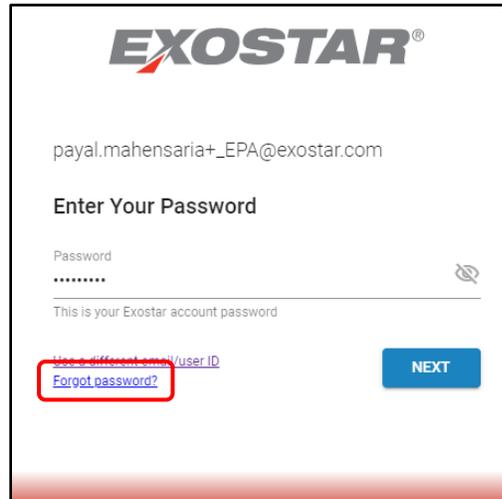
Follow the steps below to reset your password:

1. Log into your Exostar SAM Platform account by navigating to <https://secureaccess.exostar.com> . Enter your Email address, and click **Next**.



The screenshot shows the Exostar login interface. At the top is the EXOSTAR logo. Below it, the text 'Enter your Email' is displayed. There is an input field for the email address, which contains 'payal.mahensaria+\_testing04@exostar.com'. Below the input field, there is a note: 'Use the Email registered with your Exostar account'. To the left of the 'NEXT' button is a link for 'Need help?'. The 'NEXT' button is highlighted with a red box. At the bottom of the page, there is a small disclaimer: 'Unauthorized access to this system may constitute a criminal offense.'

2. Click the **Forgot Password** link.



The screenshot shows the Exostar login interface. At the top is the EXOSTAR logo. Below it, the email address 'payal.mahensaria+\_EPA@exostar.com' is displayed. The text 'Enter Your Password' is shown above a password input field. The password field contains several dots and has a toggle icon on the right. Below the password field, there is a note: 'This is your Exostar account password'. To the left of the 'NEXT' button is a link for 'Forgot password?'. The 'Forgot password?' link is highlighted with a red box. The 'NEXT' button is also visible.

3. Select **Enter verification code from phone**, and click **Next**.

**EXOSTAR®**

**Account Recovery**

Select a method to reset your password

Answer security questions

Enter verification code from phone

Enter verification code from email

CANCEL NEXT

4. Select whether you want to receive the OTP verification code via a text or voicemail, and click **Send**.

**EXOSTAR®**

**Two-Step Verification**

Send a code to your phone

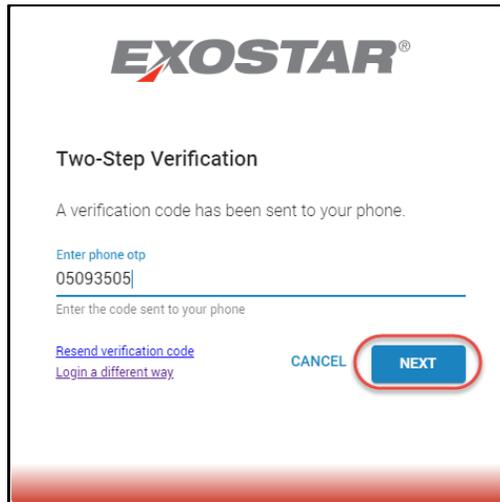
Number ending in 8669

Send a text

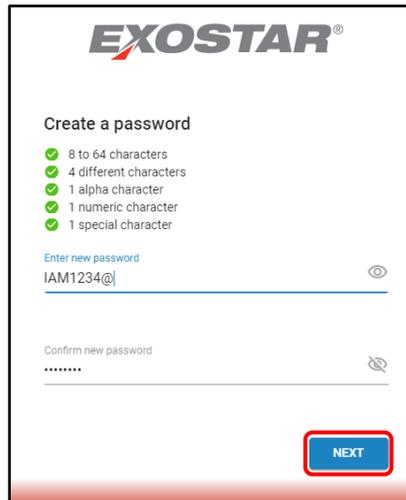
Send a voicemail

CANCEL SEND

5. After receiving the message with your OTP, enter it, and click **Next**.



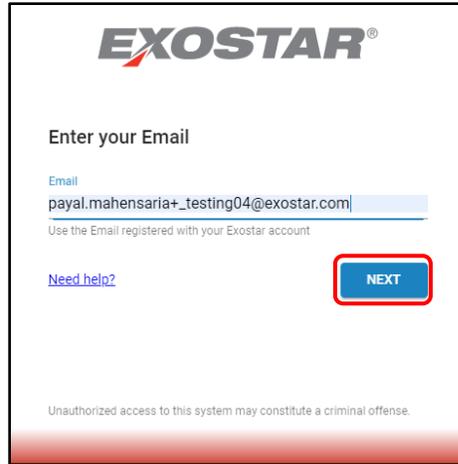
6. Enter your new password, confirm it, and then click **Next**.



7. Upon successful password change, the Exostar SAM Platform **Home** tab displays. From this tab, you can launch active applications or review organization information.

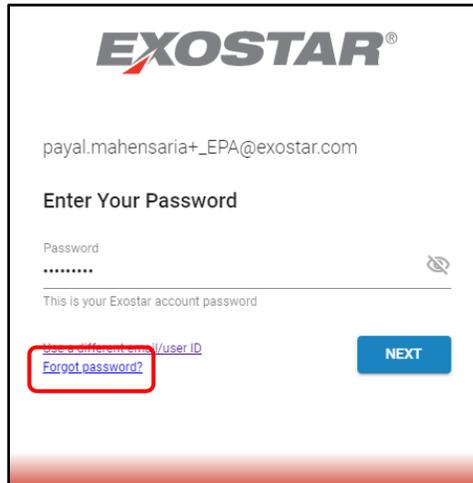
## How to Recover My Password – Email OTP

1. Log into your Exostar SAM Platform account by navigating to <https://secureaccess.exostar.com> . Enter your Email address and click **Next**.



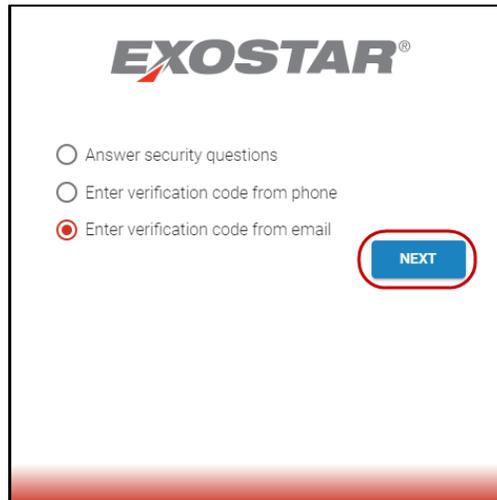
The screenshot shows the Exostar login interface. At the top is the EXOSTAR logo. Below it, the heading "Enter your Email" is displayed. A text input field labeled "Email" contains the address "payal.mahensaria+\_testing04@exostar.com". Below the input field, a note states "Use the Email registered with your Exostar account". There is a blue link for "Need help?" and a blue button labeled "NEXT" which is highlighted with a red box. At the bottom, a small disclaimer reads "Unauthorized access to this system may constitute a criminal offense."

2. Click the **Forgot Password** link.



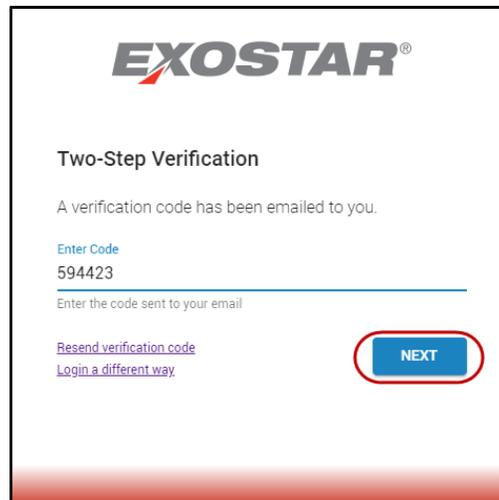
The screenshot shows the Exostar login interface at the password entry stage. The EXOSTAR logo is at the top. Below it, the email address "payal.mahensaria+\_EPA@exostar.com" is displayed. The heading "Enter Your Password" is shown. A password input field is present with a masked password "....." and a toggle icon for visibility. Below the input field, a note states "This is your Exostar account password". There is a blue link for "Forgot password?" which is highlighted with a red box, and a blue button labeled "NEXT". At the bottom, a small disclaimer reads "Unauthorized access to this system may constitute a criminal offense."

3. Select **Enter verification code** from email, and click **Next**.



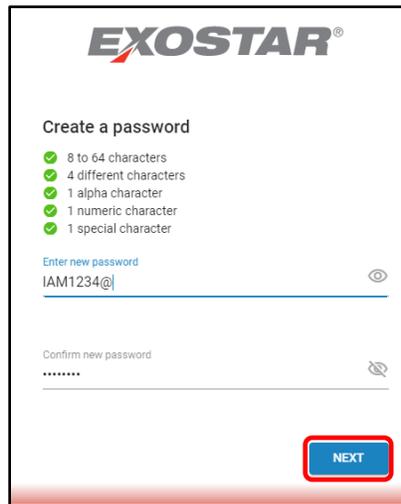
The screenshot shows the EXOSTAR logo at the top. Below it are three radio button options: "Answer security questions", "Enter verification code from phone", and "Enter verification code from email". The third option is selected with a red dot. To the right of the options is a blue button labeled "NEXT" with a red border.

4. Check the email registered to your SAM account. The email OTP that you receive will be active for the next 30 minutes. Enter the OTP and click **Next**.



The screenshot shows the EXOSTAR logo at the top. Below it is the heading "Two-Step Verification" and the text "A verification code has been emailed to you." There is a text input field with the label "Enter Code" and the value "594423". Below the input field is the text "Enter the code sent to your email". There are two links: "Resend verification code" and "Login a different way". To the right of the links is a blue button labeled "NEXT" with a red border.

5. Enter your new password, confirm it, and then click **Next**.

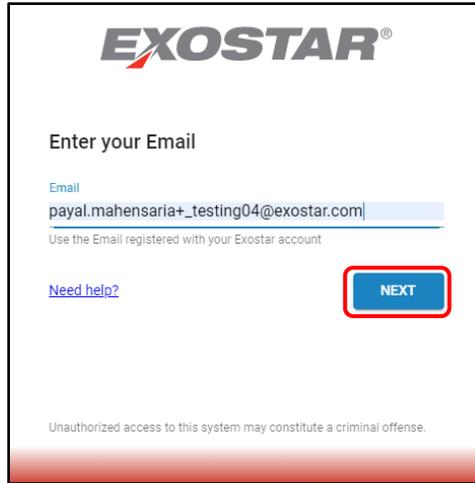


The screenshot shows the Exostar password creation interface. At the top is the Exostar logo. Below it, the heading "Create a password" is followed by four green checkmarks indicating password requirements: 8 to 64 characters, 4 different characters, 1 alpha character, 1 numeric character, and 1 special character. There are two input fields: "Enter new password" with the text "IAM1234@|" and a visibility icon, and "Confirm new password" with a masked password "....." and a visibility icon. A blue "NEXT" button is located at the bottom right of the form.

6. Upon successful password change, the Exostar SAM Platform **Home** tab will display. From this tab, you can launch active applications or review organization information.

## How to Recover My Password - Exostar Mobile ID (Powered by Authy™)

1. Log into your Exostar SAM Platform account by navigating to <https://secureaccess.exostar.com> . Enter your Email address, and click **Next**.



**EXOSTAR®**

Enter your Email

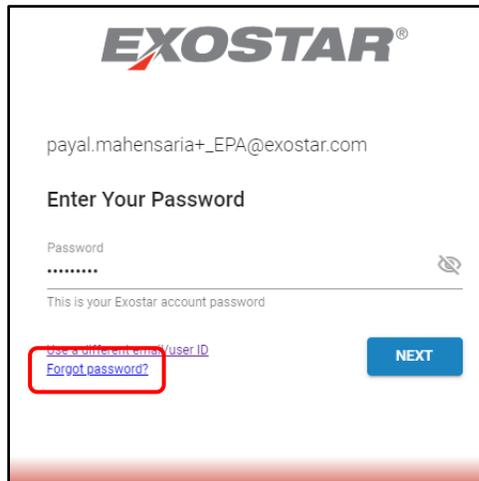
Email  
payal.mahensaria+\_testing04@exostar.com

Use the Email registered with your Exostar account

[Need help?](#) **NEXT**

Unauthorized access to this system may constitute a criminal offense.

2. Click the **Forgot Password** link.



**EXOSTAR®**

payal.mahensaria+\_EPA@exostar.com

Enter Your Password

Password  
.....

This is your Exostar account password

[Use a different email / user ID](#)  
**Forgot password?** **NEXT**

3. Select **Login with Exostar Mobile ID**, and click **Next**.

**EXOSTAR®**

**Account Recovery**

Select a method to reset your password

Login with Exostar Mobile ID

Enter verification code from email

Answer security questions

[CANCEL](#) [NEXT](#)

4. OneTouch screen displayed, a push notification is sent to the Authy™ application on the mobile device tied to your user profile.

**EXOSTAR®**

**Two-Step Verification**

**EXOSTAR MOBILE ID**  
powered by AUTHY

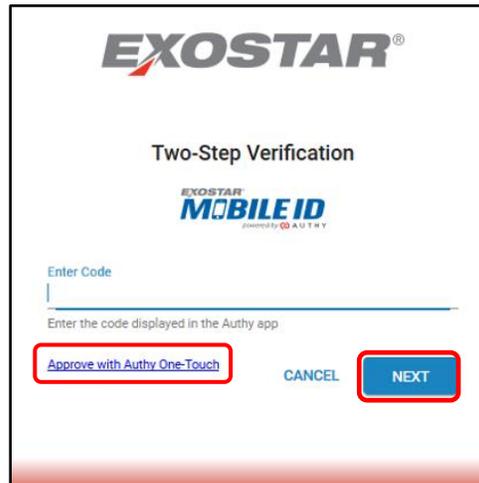
**Now waiting for One-Touch approval...**

Please approve from the Authy app on your mobile device now!

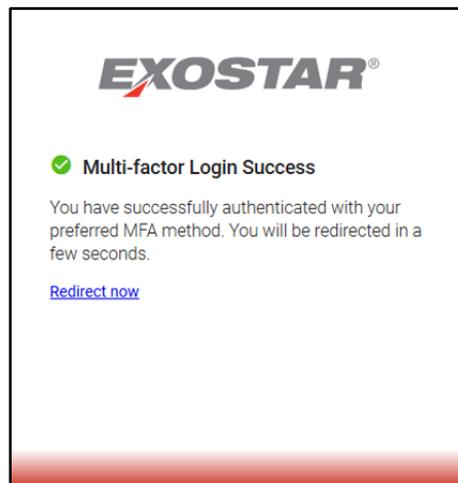
[Login with Mobile ID code](#) [CANCEL](#)

**Note:** The system will wait for a considerable amount of time for the user to approve the push notification before timing out.

On the **Two-Step Verification** screen, click **Approve with Authy One-Touch**. Enter the 6-digit code into the field provided on the Two-Step Verification screen, and click **Next**.



5. Once Authy is approved.



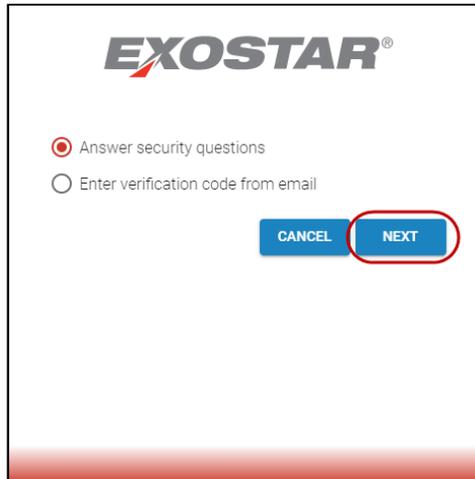
6. Follow Step 5 above to create your new password.

## How to Reset an Expired Password – Security Questions

Exostar SAM Platform passwords are set to expire after 90 days. If you attempt to login and your password expired, follow the steps below to reset:

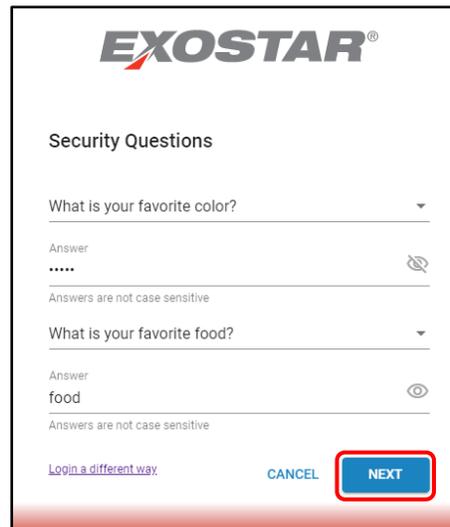
1. After a failed login attempt due to an expired password, click **Reset** to reset your password.

2. Select **Answer security questions**, and click **Next**.



The screenshot shows the EXOSTAR logo at the top. Below it, there are two radio button options: "Answer security questions" (which is selected) and "Enter verification code from email". At the bottom of the screen, there are two blue buttons: "CANCEL" and "NEXT". The "NEXT" button is highlighted with a red circle.

3. Select and answer two of your security questions set up during account activation. Click **Next**.

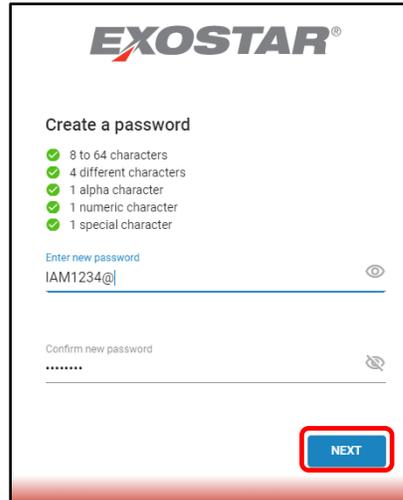


The screenshot shows the EXOSTAR logo at the top. Below it, the heading "Security Questions" is displayed. There are two questions listed:

- Question 1: "What is your favorite color?". The answer field contains "....." and is masked with a red eye icon. Below the answer field, it says "Answers are not case sensitive".
- Question 2: "What is your favorite food?". The answer field contains "food" and is visible with an open eye icon. Below the answer field, it says "Answers are not case sensitive".

At the bottom left, there is a link: [Login a different way](#). At the bottom right, there are two blue buttons: "CANCEL" and "NEXT". The "NEXT" button is highlighted with a red circle.

4. The **Create New Password** page displays. Enter your new password, confirm, and click **Next**.

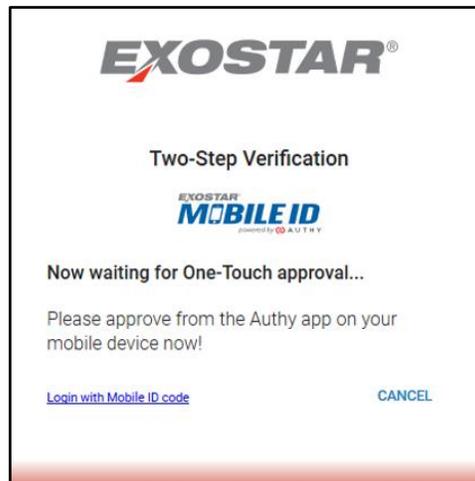


7. Upon successful password change, the Exostar SAM Platform **Home** tab displays. From this tab, you can launch active applications or review organization information.

## How to Reset an Expired Password – Exostar Mobile ID (Powered by Authy™)

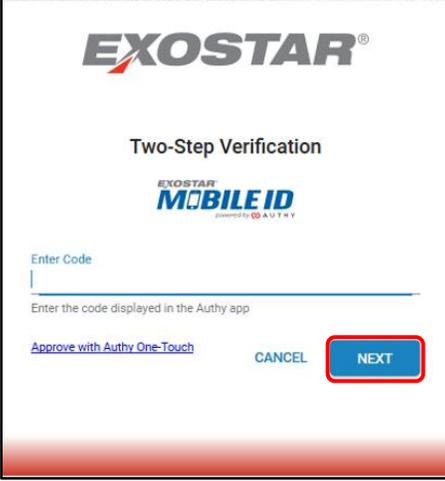
Repeat steps 1-3 above. On step 3, click **Continue** and complete the following steps:

1. On the **Mobile Credential Authentication** screen, click **OneTouch** or enter the 6-digit code displayed in the Authy™ app on your smartphone.
  - a. If OneTouch is selected, a push notification is sent to the Authy™ application on the mobile device tied to your user profile.



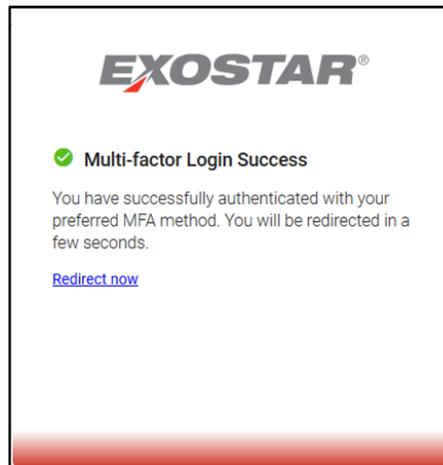
**NOTE:** The system waits for a considerable amount of time for the user to approve the push notification before timing out.

- b. Enter the 6-digit code into the field provided on the Mobile Credential Authentication screen, and click **Next**.



The image shows a 'Two-Step Verification' screen for EXOSTAR. At the top is the EXOSTAR logo. Below it, the text 'Two-Step Verification' is centered. Underneath is the 'EXOSTAR MOBILE ID' logo. A text input field is labeled 'Enter Code' and contains a blue underline. Below the field, the text reads 'Enter the code displayed in the Authy app'. At the bottom, there are three buttons: 'Approve with Authy One-Touch' (a blue link), 'CANCEL' (a blue button), and 'NEXT' (a blue button with a red border).

2. Once Authy is approved.



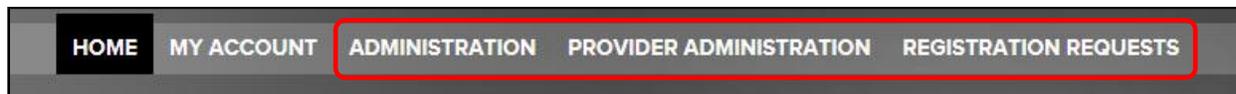
## Exostar SAM Platform Portal

When you log into the Exostar SAM Platform portal, the landing page is displayed. It consists of two functional tabs: the **Home** tab and the **My Account** tab.



- **Home** tab contains several containers of information including My Applications, My Organization, My Tasks, and Account Summary. You can open the applications you have access to from the Home tab.
- **My Account** tab allows you to edit your account profile, view organizational details, and manage email address, password and security questions.

Users with administrative roles will see additional tabs in the Exostar SAM Platform portal.



- **Administration** tab is available to Organization Administrators and provides user management capabilities. New users will be created within this tab, and existing user profiles can be updated. In addition, the administrator may subscribe the organization to additional applications.
- **Registration Requests** tab is available to Organization Administrators, and is used to grant Exostar SAM Platform account approvals and application access to users who self-register. It is also used to approve users for OTP Token use.
- **Provider Administration** tab is available to Service Provider Administrators, and is used to manage Organization and User account subscriptions and access. The SP Admin role is not an org level administrator, but rather a system level administrator assigned by Exostar.

Please refer to the Exostar SAM Platform Administration Guide for more information on these roles, and the administrative functions available within SAM.

## The Home Tab

When you log into the Exostar SAM Platform, the **Home** tab is displayed featuring a dashboard of information. The page is primarily used to access your active applications. In addition to

providing application access, this screen will contain summary information about your organization, tasks, and account.

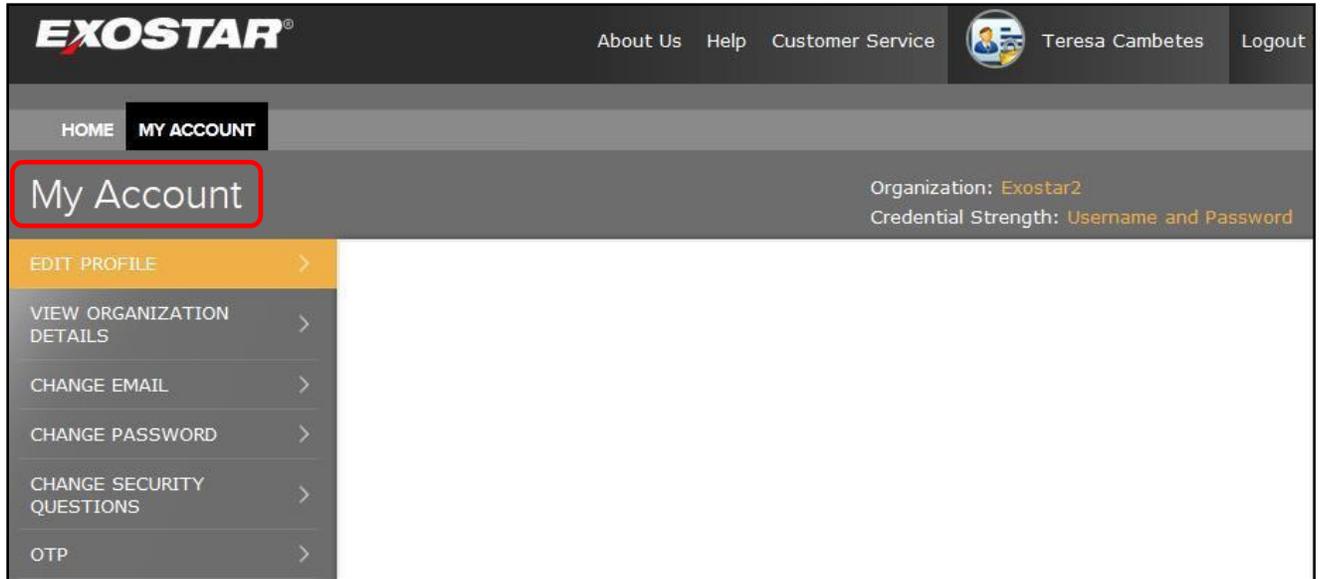
The screenshot displays the EXOSTAR user interface. At the top, the EXOSTAR logo is on the left, and 'Help', 'Customer Service', a user profile icon for 'Teresa Cambetes', and 'Logout' are on the right. Below this is a navigation bar with 'HOME' (highlighted with a red box), 'MY ACCOUNT', 'ADMINISTRATION', 'PROVIDER ADMINISTRATION', and 'REGISTRATION REQUESTS'. The main content area is titled 'Home' and shows several sections: 'My Activities', 'My Applications' (containing three application cards: EngageZone, Exostar LLC, and Test Service Provider), 'My Organization' (with a red notification 'My Tasks -- Task(s) Pending!'), and 'Service Provider Administration' (with an 'Account Summary' link). A '+ Expand All Sections' button is located on the right side of the My Applications section.

**Note:** The +Expand All Sections will expand each of the remaining containers. Each container may also be expanded individually by clicking on the containers  link.

- **My Applications container:** The **My Applications** container lists all applications that you have access to. Click the Application name to launch the solution.
- **My Organization container:** The My Organization container provides the Organization ID and a summary of user statuses within your organization. The **View Organization Details** link provides access to the Organization Details page under **My Account** tab.
- **My Tasks container:** The My Tasks container provides a consolidated list of to-do items with a link directly to each of the tasks. This may include Organization subscription requests and Password Expiration notices.
- **Account Summary container:** The Account Summary container provides a summary of your account and your role(s) within SAM. The **View Account Details** link provides access to the Edit Profile page.

## The My Account tab

The My Account tab allows you to manage your account profile, email address, password, security questions, and to view organization details.

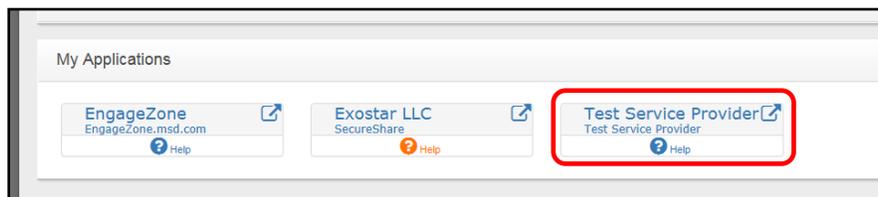


- **Edit Profile** allows you to update your user profile information and link your Exostar SAM Platform account with your Remote Identity Provider (R-IDP) account.
- **View Organization Details** displays information about your organization, including your Organization ID.
- **Change Email** allows you to update your email address.
- **Change Password** allows you change your current password. *Note: The application will require you to change your password every 90 days.*
- **Change Security Questions** allows you to change the security questions that you established for your account during your first time login.
- **OTP** allows you to register, manage, or elevate the phone-based OTP functionality.

\* Does not apply to SSO – EAG connected users.

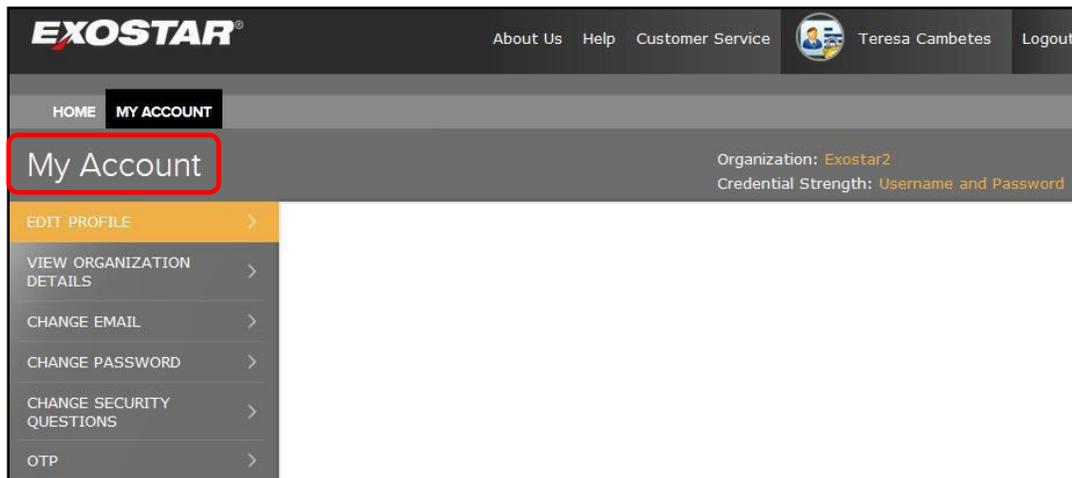
## APPLICATION ACCESS

The Exostar SAM Platform portal **Home tab** displays all applications that you have been granted access to. From the **Home tab**, you can easily access your active applications by simply clicking on the application name.



## ACCOUNT MANAGEMENT BY USER

You can manage your account within the Exostar SAM Platform portal from the **My Account** tab. The tab consists of links that allow you to: Edit Profile, View Organizational Details, and Change Email, Password, Security Questions, and OTP.



### Edit Profile

The Edit Profile Page allows you to view and modify your user profile information. It also allows you to link your Exostar SAM Platform account to the R-IDP Account.

**Note:** If your account has been linked to your corporate network account via Enterprise Access Gateway (EAG), changes you make to your Exostar SAM profile may be updated upon login by your organizations directory.

### How to Edit My Profile

To edit your Account Profile:

1. Log into the Exostar SAM Platform. Access the **My Account** tab. You will see your profile page.



2. Review the profile information and make desired changes. Click **Continue**.

HOME MY ACCOUNT

My Account Organization: Exostar2  
Credential Strength: Username and Password

EDIT PROFILE >

VIEW ORGANIZATION DETAILS >

CHANGE EMAIL >

CHANGE PASSWORD >

CHANGE SECURITY QUESTIONS >

OTP >

User Profile

User ID: cambetest\_9381 Phone: 7035551234

Email: tcambetes@aol.com Fax:

Role: User

Organization: Exostar2 Street Address 1: 123 main street

Organization Name: Street Address 2:

Organization ID: EXO113817916 City: leesburg

Onboarding Sponsor: Merck & Co. State: va

Title: Select ... Zip/Postal Code: 20176

Country: UNITED STATES

Time Zone: GMT

Restricted Access: Off

Created Date: 28 Mar 2015 10:05 PM GMT

Suspended Date(From SAM): N/A

Last SAM Access Date: 29 Mar 2015 09:41 PM GMT

First Name: Trisha

Middle Name:

Last Name: Cambetes

Suffix:

Job Title:

Sponsor Email:

3. A review page will be displayed. Review and verify that the changes have been entered correctly. Click **Submit**.
4. The confirmation page is displayed confirming that changes have been processed. You will receive an email confirming the changes.

## Shared Users

Users who are under SMOs (Sponsor Managed Organizations) have the ability to become shared users. The Shared User type allows users to be subscribed to non-sponsor applications. Once a shared user is subscribed to a non-associated sponsored application, Org Admins and MPAs from SMOs will have restricted org level control over the user, and can no longer execute following functions:

- Make profile updates on Shared Users
- Suspend/Enable the SAM accounts of Shared Users
- Deactivate the SAM accounts of Shared Users
- Suspend/Enable Organizations with any Shared Users (Applicable to MPAs only)
- Delete Organizations with any Shared Users (Applicable to MPAs only)

**Note:** If the user unsubscribes from a non-sponsored application, they will still remain a **Shared User**.

## View Organization Details

The **View Organization Details** link provides the user with the following information:

- Organization Details: including name, address, and Org ID
- Credential Buyer information
- Organization Contact – Org and App Admins
- Active Applications
- Contact information for Application Administrators by application

My Account

Organization: Highline/Exostar QA  
 Credential Strength: Username and Password

EDIT PROFILE >	
VIEW ORGANIZATION DETAILS >	
CHANGE EMAIL >	
CHANGE PASSWORD >	
CHANGE SECURITY QUESTIONS >	
OTP >	

### Organization Details

Onboarding Sponsor: General		Allowed Domains for NA user's Email Address:	
Management Type: Partner-managed	Individual-Level false	Address 1: 42070 Briarberry Place	Address 2: NA
Organization Name: Highline	Organization?:	City: Leesburg	State/Province: VA
Organization ID: EXO114766233	Business Unit: Exostar QA	Zip/Postal Code: 20176	Country: US
Organization's US HQ/Country of Incorporation:	TaxID (US Only): NA	Created Date: 13 Jun 2014 02:07 PM EDT	Suspended Date: N/A
DUNS #: NA	Level 3 Override: false		

### Credential Buyer

Credential buyer: No credential buyer  
 Use onboarding sponsor's buyer: off

### Organization Contact

First Name	Last Name	Email	Phone
Teresa	Cambetes	teresa.cambetes@exostar.com	7034318676

### Organization Administrators

First Name	Last Name	Email	Phone
Teresa	Cambetes	teresa.cambetes@exostar.com	7034318676

### Application Administrators

First Name	Last Name	Email	Phone	Application
Teresa	Cambetes	teresa.cambetes@exostar.com	7034318676	EngageZone.merck.com

### Application Settings

Application Access:	Provider	Application	Status
	EngageZone	EngageZone.merck.com	Active
	Test Service Provider	Test Service Provider	Active

## Change Email

The **Change Email** feature allows users to change the email address tied to their SAM account. Emails must be unique in the system, and they cannot be linked to multiple accounts. If you need to change your email address, inform all project partners about this change to ensure that your access to applications remains uninterrupted.

**Note:** If your account has been linked to your corporate network account via Enterprise Access Gateway (EAG), you will not be able to access 'Change Email' tab.

### How to Change the Email Address Associated with my Account

1. Log into SAM. Open the My Account tab and click the **Change Email** link.

HOME MY ACCOUNT

My Account

Organization: Exostar2  
Credential Strength: Username and Password

EDIT PROFILE >  
VIEW ORGANIZATION DETAILS >  
**CHANGE EMAIL >**  
CHANGE PASSWORD >  
CHANGE SECURITY QUESTIONS >  
OTP >

**Step 1:** Enter new email address and click **Continue**. You will receive an activation code by email.

Modify Email

Current Email Address: tcambetes@aol.com  
\*New Email Address:

Clear Continue

**Step 2:** To activate your new email address, enter activation code from email.

Activate Email

\*Activation Code:

Activate

2. Enter your new email address.

**Step 1:** Enter new email address and click **Continue**. You will receive an activation code by email.

Modify Email

Current Email Address: tcambetes@aol.com  
\*New Email Address:

Clear Continue

3. Access your email to obtain the 'activation' code.

- Return to the Exostar SAM Platform portal, and enter the activation code.

**Step 2:** To activate your new email address, enter activation code from email.

Activate Email

\*Activation Code:

Activate

## Change Password

The **Change Password** feature allows users to change their SAM Platform account passwords. The new password must comply with the Password Strength Policy:

- It must contain a minimum of 8 characters and a maximum of 64 characters.
- It must contain at least 4 distinct characters, 1 alphabetic character, 1 numeric character and 1 special character such as !,@,#,\$,% etc.
- Leading and trailing spaces are not permitted.

*Note: If your account has been linked to your corporate network account via Enterprise Access Gateway (EAG), you will not be able to access the 'Change Password' tab.*

## How to Change Your Password

- Log into SAM. Open the **My Account** tab, and click the **Change Password** link.

EXOSTAR®

Help Customer Service Payal Mahersaria Logout

HOME MY ACCOUNT REGISTRATION REQUESTS CUSTOMER SUPPORT ADOPTION

My Account

Organization: Exostar LLC  
Credential Strength: Username and Password

EDIT PROFILE  
VIEW ORGANIZATION DETAILS  
CHANGE EMAIL  
CHANGE PASSWORD  
CHANGE SECURITY QUESTIONS  
OTP

**Change Password**

\*Required

**Password Guidelines:** Passwords must be 8 to 64 characters long. They must include at least 4 different characters, 1 alphabetic character, 1 numeric character, and 1 special character. Leading and trailing spaces are not allowed.

\*Old Password:

\*New Password:  **Very Weak**

\*Confirm New Password:

Submit Clear

- The Change Password page will display. Enter your current password. Enter the new password, and re-enter for confirmation.

\*Old Password:

\*New Password:  **Very Weak**

\*Confirm New Password:

3. Click **Submit**.

## Change Security Questions

The **Change Security Questions** feature allows users to change security questions that have been associated with their SAM Platform accounts. Please note the following regarding your Security Questions:

- Security questions are used when you have forgotten your password, or when you need to change your password.
- The system will only require you to remember two of the four questions when resetting your password.
- Each of your question and answer combinations must be unique.
- The answers to the security questions are case-sensitive.

*Note: If your account has been linked to your corporate network account via Enterprise Access Gateway (EAG), you will not be able to access the 'Change Security Questions' tab.*

## How to Update Your Security Questions

1. Log into SAM. Open the **My Account** tab, and click the **Change Security Questions** link. The Change Security Questions page will display.

The screenshot shows the 'My Account' interface. On the left, a sidebar contains links: 'EDIT PROFILE', 'CHANGE EMAIL', 'CHANGE PASSWORD', 'CHANGE SECURITY QUESTIONS' (highlighted with a red box), and 'OTP'. The main content area is titled 'Change Security Questions' and includes instructions: 'Update your existing security questions and answers by clicking the **Change** box, entering the new answer, and clicking **Submit**.' Below this, there are three question entries. Each entry consists of a question dropdown menu, an 'Answer' text input field, a 'Confirm Answer' text input field, and a 'Change' checkbox. The questions are: 'Question 1: What was your first pet's name?', 'Question 2: What is your favorite color?', and 'Question 3: What is your mother's maiden name?'.

2. Locate and select the question/answer combination to be changed.
3. Make changes, and click **Submit**. The on-screen message will display confirming that changes have been processed. You will receive a confirmation email as well.

## One Time Password (OTP)

One Time Password credentials are mandatory if you need to access partner applications that require two-factor authentication (2FA). Therefore, if you are attempting to access an application that requires 2FA, you need a security credential.

## Identity Proofing

Depending on the credential requirement for your application, you may need an **OTP credential with or without the identity proofing upgrade**. Identity proofing is the process of verifying your identity with Exostar. If your OTP credential does not require identity proofing, proceed to the [OTP](#) Registration section of this guide to learn how to register your credential.

There are two types of proofing:

- **US Based Users - Experian Proofing Service:** For US-based users, it is preferred if you proceed through the Experian proofing by completing the Credit Bureau Based Proofing process. During this process, you will be prompted to answer questions about past credit or residential history, provided and verified by a credit bureau.
- **International Based Users - Exostar Webcam Proofing:** International-based must complete the Webcam Proofing process. During this process, you will meet and verify your identity virtually, with a proofing agent.

## US-Based User Proofing: Experian Proofing

Experian proofing is a credit bureau proofing process, which requires you to verify your identity by answering credit bureau based questions. If you answer the questions correctly, you will be complete with proofing, and will be prompted to register your OTP credential. Credit Bureau Based Proofing is only available for users located in the US.

### Important:

- If you do not answer the questions correctly, but the credit bureau is able to locate you with your personal information (e.g. name and address), you will receive the activation code via postal mail.
- If the credit bureau is unable to locate you in their database, you will be redirected to the Live Proofing process to complete your identity proofing.
- Users unable (or unwilling) to complete credit bureau based questions can opt to complete the Webcam Proofing with a live proofing agent. If you click **I Disagree**, you will be redirected to schedule the Webcam Proofing.

## Follow the steps below to complete Experian proofing:

1. After you have confirmed your profile (not illustrated), you will need to verify your identity. Please ensure that the required fields are completed accurately. Click **I Agree** to continue.

Step 1: Confirm Profile | **Step 2: Verify Identity** | Step 3: Register Phone

- Enter the information instructed below.
- Exostar will not store or update your profile with this information, which is only used during the identity verification process to confirm you are who you say you are.
- Need more information? [View our frequently asked questions](#)

Your full legal name is required. If the information below is incorrect, you must return to Edit Profile in My Account to update your profile.

\*First Name: Alice Middle Name:  
\*Last Name: Chow Suffix:

Enter your current home address below.

\*Home Address: 816 ARCHDALE DR APT C \* State: North Carolina  
\*City: CHARLOTTE \*Zip Code: 28217-1286 (ex:20001 or 20001-1234)

Enter a phone number. If you do not have a home number, you can enter an alternate such as a mobile phone number.

Home Phone: (Numbers only) Alternate Phone:

This information is required for verifying your identity. Exostar will not store or update your profile with this information.

\*Date of Birth : Month February Day 01 Year 1970 \*Social Security Number: 9358 (Last 4 numbers only)

By agreeing to participate in the identity verification process, I hereby consent to the use of the information (including any personally identifiable information) I provide herein in the identity verification process. You understand that by clicking on the I Agree button immediately following this notice, you are providing 'written instructions' to Exostar under the Fair Credit Reporting Act authorizing Exostar to obtain information from your personal credit profile or other information from Experian. You authorize Exostar to obtain such information solely to verify your identity. [View and Print](#)

I Agree  I Disagree

2. A list of questions regarding your financial and residential history will be presented. These questions, and your responses, will be used to verify your identity, so please answer carefully and accurately.

3. Once you complete all questions, click **Next** to continue.

**Note:** If you answered questions incorrectly, but the credit bureau was able to locate you with your personal information, you will receive an activation code in four business days via postal mail. Use this activation code to activate your credential.

If the credit bureau was unable to verify your identity, the system will redirect you to schedule the Webcam proofing interview.

4. Upon successful completion of proofing, you will be directed to register your OTP credential.

## International-Based User Proofing – Webcam Proofing

International-based users and US users unable to complete the credit bureau proofing will be directed to undergo Exostar’s Webcam Proofing process. During Exostar’s live Webcam Proofing, you will be asked to present a valid government-issued photo identification to an Exostar Proofing Agent. A valid and unexpired government photo ID is required. Non-US nationals must provide a valid and unexpired photo ID that is recognized and accepted by the US Federal Government.

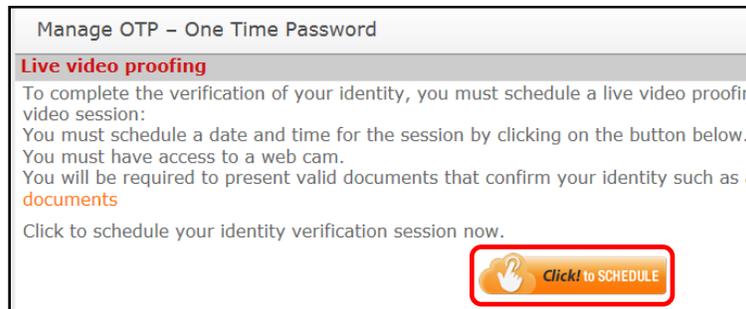
Exostar Webcam Proofing takes place within a secure Cisco WebEx meeting. Before your appointment, we highly recommend performing the [WebEx System Test](#) on your machine, as there is limited time during the proofing session to troubleshoot your system configuration. Excessive troubleshooting time during the proofing appointment will likely result in the need to reschedule.

For additional information about webcam proofing requirements, including acceptable documentation and troubleshooting, please visit the [Webcam Proofing Resource](#) page.

### Schedule Your Proofing Appointment

Follow the steps below to complete Webcam proofing:

1. Click the **Click! to Schedule** button.



- To schedule your proofing appointment, select an available date and time. Click **Continue**.

Webcam Proofing...  
Select Date and Time

November 2017 < > Week Month Time Zone (-05:00) Eastern Time

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2 6 Available ▾	3 13 Available ▾	4
5	6 12 Available ▾	7 13 Available ▾	8 14 Available ▾	9 14 Available ▾	10 14 Available ▾	11
12	13 14 Available ▾	14 14 Available ▾	15 14 Available ▾	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Back powered by timetrade Continue

- Enter your contact information. Click **Confirm**.

Provide Information

First name \*  Last name \*

Email \*

Phone Number \*

Company

Comments

Back powered by timetrade Confirm

4. You have successfully scheduled your appointment. The appointment confirmation page will display, and you will also receive an appointment confirmation email.

### Webcam Proofing...

Wednesday, November 8, 2017 9:30 AM - 10:00 AM Eastern Time	Confirmation # 9031295 SCHEDULED
---	-------------------------------------

---

**Instructions**  
This is a test appointment only. No follow up will be made by an Exostar proofer. If you need to have your registration request approved so you can register a phone, contact the Exostar team members with whom you are working.

Appointment Type	Test and UAT Proofing Appointments	<input type="button" value="Add to Calendar"/>
Call With	Test Proofer	
Your Information	Tester Tester @exostar.com 7035551234	

**Note:** An Exostar proofing agent will contact you on your scheduled appointment date. The proofing appointment can take up to 30 minutes.

5. You will be contacted by the Exostar Proofer on the day of your appointment.  
During your proofing appointment, you will be required to answer a series of “yes” or “no” questions, and provide acceptable, unexpired identification via a webcam to the proofer. Visit the [Live Video Proofing Resource](#) page for more information.  
Once you successfully complete proofing, the proofing agent will provide you with the activation code. Use this code to activate your credential.

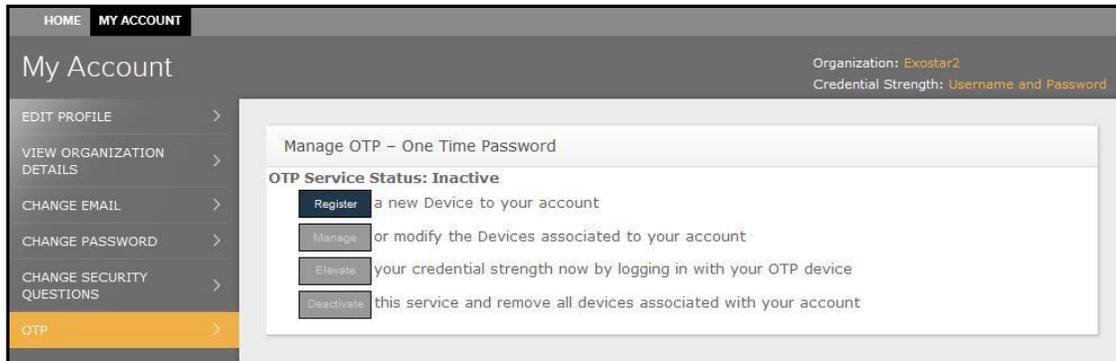
### OTP Registration and Management

The **OTP** link will allow you to register, manage, elevate, or deactivate your OTP credential. The OTP credential may be linked to your account via phone, OTP Hardware, or Exostar Mobile ID. You can only register one credential type to your account.

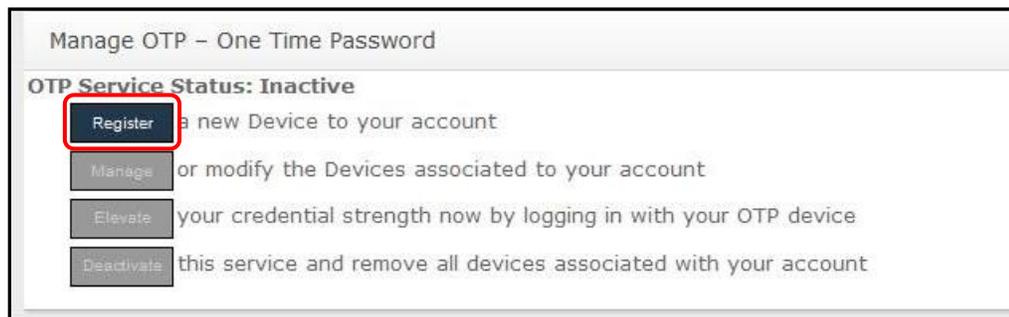
## How to Register your OTP Credential

Follow the steps below to register and activate the required OTP credential:

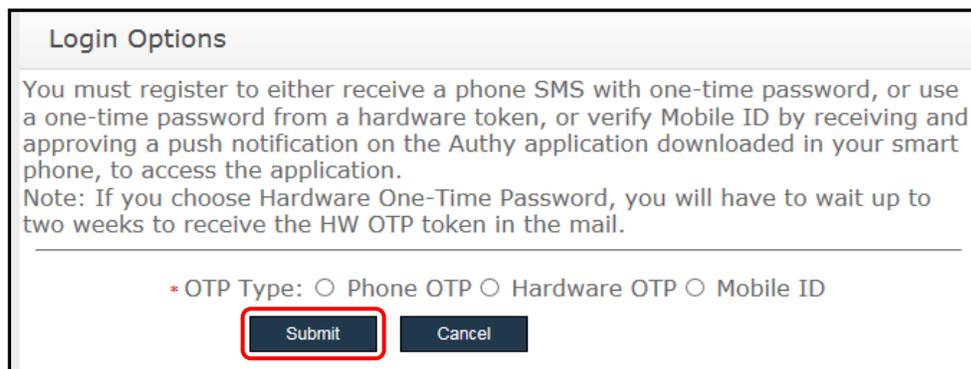
1. Log into SAM. Open the My Account tab and click the **OTP** link.



2. Click **Register** to register a new device to your account.



3. In some cases, you will have the option to choose the OTP credential type that you would like to register. Choose between Phone OTP, Hardware OTP, or Mobile ID. Click **Submit**.



**Note:** If your organization is not setup to accept OTP Hardware or Exostar Mobile ID, you will only see Phone OTP.

4. For OTP Hardware, enter your address, and click **Submit**.

**Login Options**

You must register to either receive a phone SMS with one-time password or use a one-time password from a hardware token to access the application.  
Note: If you choose Hardware One-Time Password you will have to wait up to two weeks to receive the HW OTP token in the mail.

\* OTP Type:  Phone OTP  Hardware OTP

\* Street Address 1:   
Street Address 2:   
\* City:   
\* Country:   
\* State/Province:   
Postal/Zip Code:

For Phone OTP or Exostar Mobile ID (powered by Authy™), enter user information, select the Country, and click **Next**.

**Manage OTP - One Time Password**

**Step 1: Confirm Profile**

Before beginning the identity verification process, make changes to your profile information below. Your name should match your legal name as displayed on a passport or other legal identifying documentation. Select the country where you live. If you live in the United States but do not have a social security number, select your country of citizenship.

\* First Name:  Email:    
Middle Name:  \* Country:   
\* Last Name:   
Suffix:

## Phone OTP Credential

1. Select **Delivery Method** (text message or voice message) and **Country**. Enter the phone number in the **Enter** and **Confirm Phone Number** fields.
2. Click **Send Code**.
3. You will receive a verification code via your selected delivery method.
4. Enter the received code in the **Verification Code** field.

5. Click **Submit**.
6. The *successful registration* message will display. Click **Complete**.

**Note:** Standard text messaging rates apply. The verification code expires after two minutes. You can resend a new code to the selected delivery method. Additionally, after you register your initial telephone, you can register additional phones. It is recommended you register at least two phones, but you can register up to three.

#### Exostar Mobile ID Credential

1. Install Authy™ on your mobile device. You can find this on your phone's app store.
2. Select country and enter your mobile phone number. Click **Register Phone**.
3. View the push notification or app from your mobile device to approve or deny. If this is unsuccessful, obtain a token ID from the app. Click the **X** to cancel **One Touch**. Enter the token id that displays in the Authy app in the **Soft OTP** field and click **Submit**.
4. You will receive a successful registration message. Click **Complete**.

#### Login with Registered Credential

In order to access you applications, you need to log into SAM with your registered credential. Follow the instructions below to log in with the credential:

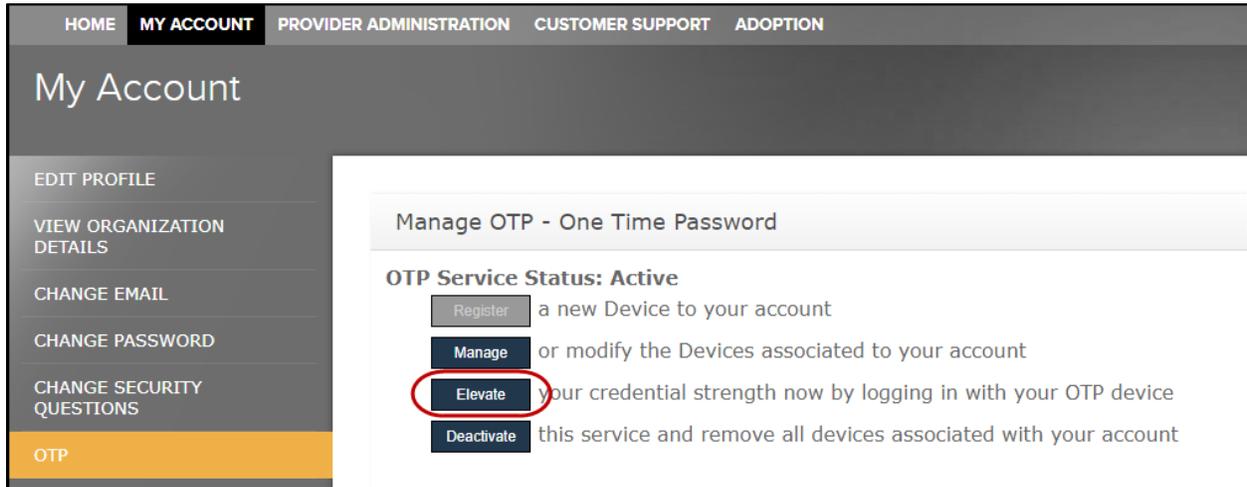
#### OTP Hardware

1. Log into your Exostar SAM Platform account with your username and password.
2. Select **One Time Password**. Click **Continue**.
3. You will receive the OTP Authentication page. Enter the One-Time Password code displayed on your token in the **One-Time Password** field. Click **Authenticate**.
4. You are authenticated with your OTP Hardware token. The credential strength (upper, right corner) will display **Hardware OTP**.

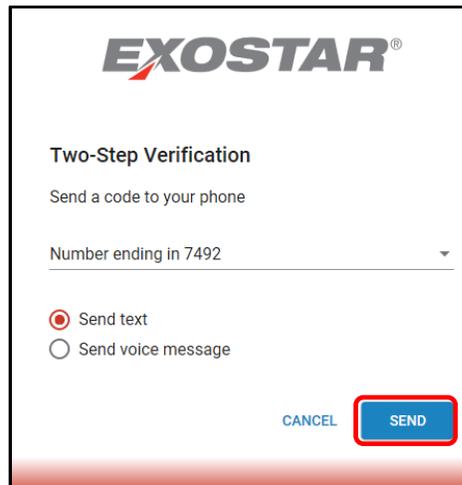
#### Phone OTP

1. Log into your Exostar SAM Platform account with your username and password.

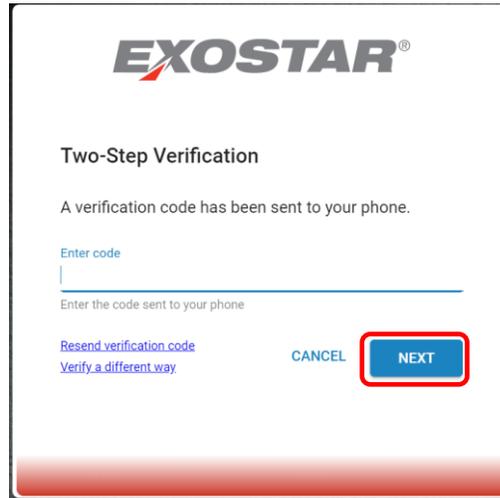
2. Navigate to **My Account**, and click **OTP** in the left-hand menu.
3. Click **Elevate**.



4. The phone number and delivery method default. Click **Send**.



5. You receive the authentication code via your selected delivery method. Enter the code in the field provided. Click **Next**.

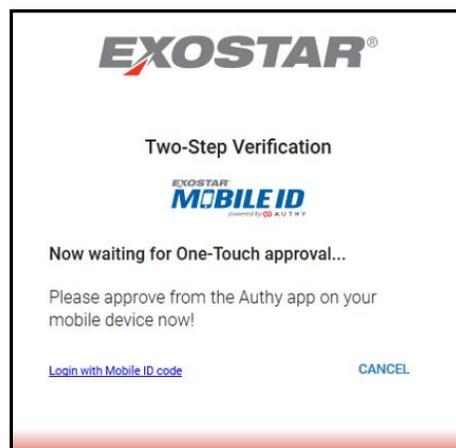


6. You are authenticated with your Phone OTP credential. The credential strength (upper, right corner) will display **Phone OTP**.

Organization: Exostar2  
Credential Strength: Phone OTP

## Exostar Mobile ID

1. Log into your Exostar SAM Platform account with your username and password.
2. Select **One Time Password**. Click **Continue**.
3. If OneTouch is selected, a push notification is sent to the Authy™ application on the mobile device tied to your user profile.



4. Enter the 6-digit code into the field provided on the Mobile Credential Authentication screen, and click **Next**.

5. Once Authy is Approved.

## OTP Management

After you have successfully registered your credential, you can manage, elevate, or deactivate the credential from the OTP link.

- **Manage** – The **Manage** button allows users to manage their OTP credential. With this button, Phone OTP Users can register additional phone numbers, or delete phone numbers from their accounts. Also, use the **Manage** button if you want to revoke a credential. Registering additional phone numbers allows you to have an alternative device in case you lose access to your primary phone. If you do not register an additional phone number and lose access to the initial phone number, you will need to complete identity proofing again and to register a new phone. You can register up to three phone numbers.

**Note:** Revoking is a permanent and irreversible action. If you revoke your credential, you will be required to register a new credential to your account. If your credential included the identity proofing upgrade, you will need to complete identity proofing again if you are using Phone OTP and did not register additional phones, OTP Hardware, or Exostar Mobile ID.

- **Elevate** – If you log into Exostar SAM Platform without your OTP credential, you can choose to elevate your credential strength during the same session and without logging out.
  1. To elevate, click **Elevate**.
  2. Fill out the required information, and click **Submit**.
  3. The credential strength (upper, right corner) should now display your credential (it should no longer say “username and password”).

- **Deactivate** – The **Deactivate** button removes the credential from your account.

**Note:** Deactivate is a permanent and irreversible action. If you deactivate your credential, you will be required to register a new credential to your account. If your credential included the identity proofing upgrade, you will need to complete identity proofing again.

## Account Disablement

Inactivity on your account may result in the account being suspended or deleted. The following are some reasons why your account may get deleted or suspended:

- **Account activation not completed for more than 180 days** – If you haven't completed first time login (account activation) for your Exostar SAM Platform account within 180 of account creation, your account will be deleted. If your account is deleted, you will have to re-register in the system.

- **Application access suspension** – Each application can set the parameters for the number of days of inactivity that will lead to access suspension. If your application access is due for suspension in 30 days or less, each time you login to your Exostar SAM Platform account, you will be presented with a flash screen to remind you to access the application and the number of days to suspension. To ensure that you do not lose access to the applications you need, it is a good practice to login to your Exostar SAM Platform account regularly and access available applications.
- **Application access deletion** – If your application access has been suspended for ‘x’ number of days as specified by the application owner, your access to the application will be deleted. You will be notified regarding this deletion 30 days in advance.
- **Active account deletion:** If the last active application subscription is suspended, your Exostar SAM Platform account will be suspended 30 days after the application suspension. You will be notified regarding this suspension 30 days in advance. Contact Exostar Customer Support for information on how to re-establish application access.

## User Self Registration

You can initiate the process of creating your Exostar SAM account and requesting application access by going through the User Self-Registration process. Follow the steps below to complete self-registration:

1. Go to <https://secureaccess.exostar.com/userRegistration> . Complete all required fields.

User Registration

STEP 1 Personal Information → STEP 2 Products & Services

Please complete and submit the following User Registration Form to register yourself to access products and services available through Secure Access Manager. (Fields marked with asterisks(\*) are required.)

**Organization Information**

Enter your Organization's ID and then click 'Verify Organization'

\* Organization ID:  **Verify Organization**

Organization Name:

Business Unit:

**Personal Information**

\* Onboarding Sponsor:

Title:

\* First Name:

Middle Name:

\* Last Name:

Suffix:

Sponsor E-mail Address:

\* Phone:

Fax:

\* E-mail:

\* Confirm E-mail Address:

\* Address 1:

Address 2:

### Note:

- After you enter the Organization ID, click **Verify Organization** to populate the next two fields.
- All required fields are denoted by \*.
- It is recommended that you use your organization domain email address, not a personal email address.
- After completing the Personal Information section, select the captcha to validate your registration.

2. Select the application(s) for which you would like access. Indicate the subscription period, if applicable. The products and services that are listed on this page are based on selections made by your organization. Click **Next** to continue.

The screenshot shows the EXOSTAR User Registration interface. At the top, there is a navigation bar with the EXOSTAR logo and links for 'About Us', 'Help', and 'Customer Serv'. Below this is a progress indicator showing 'STEP 1 Personal Information' and 'STEP 2 Products & Services'. A message states: 'The products and services that are listed on this page are based on selections that were made by your organization.' A note follows: 'NOTE: If you would like to register for a product or service that is not shown below, please contact your administrator or refer to the help or customer service options at the top of this page for additional support.' The 'Products & Services' section contains two options, each with a checkbox and a 'Subscription period' field (Years, Mon, Days). The first option is 'Test Service Provider'. The second option is 'EngageZone.merck.com', with a description: 'This is a secure collaboration portal solution for the Merck Research community. Select this option to request access to the ForumPass MPF service. You will be required to accept Terms and Conditions as part of your First Time Login to ForumPass MPF.' At the bottom right, there are buttons for 'Cancel', '<< Back', and 'Next >>'.

**Note:** In order to access applications with the higher level of security (i.e., a Level 3 application), the Sponsor Email Address must match an email within the sponsoring organization

3. The Submission Confirmation page will display, confirming the submission of your request to the Administrator.

The screenshot shows a 'Submission Confirmation' page. The text reads: 'Thank you for submitting your registration. Once your registration has been processed, you will be contacted by the Customer Support within the next 24-72 hours, after which you can access products and services that you may have selected.' Below this, it says: 'You may close your browser at any time.' At the bottom, it provides a reference number: 'Please use reference number **SIG\_1348597790728** if you need to contact support with questions. Refer to the help or customer service options at the top of this page for additional support.'

**Note:** Use the reference number from this confirmation if you need to contact Exostar's Customer Service with any questions related to SAM Platform.

4. You will receive an email confirming that your request has been received. No further action is required on your part at this time. Your Organization Administrator will be notified of the pending request.

5. Once your request has been approved, you will receive an email notification. This email is very important because it will contain the activation link for your SAM account.