SecureForms Functional Administrator Guide

January 2024

Contents

Document Versioning

Version	Change Overview	Date	Responsible Party
2.0	Documentation Update	12/05/2018	Raytheon
2.0	SecureForms Refresh	09/24/2018	Tom McHale
2.0	MAG 7.0	February 2021	Beena Nair
	MyExostar Migration	September 2022	Ashleigh Howell
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Document Overview

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

- SecureForms Access
- Roles, Permissions, and Responsibilities
- Modifying Email Templates
- Reports
- Managing User Roles
- Viewing and Printing Forms
- Modifying Banner Messages
- Managing RShare

Summary

SecureForms focuses on providing RTX 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 Raytheon users to continuously review and make future decisions on supplier relationships.

Accessing SecureForms

RTX users can access RTX SecureForms by leveraging their company-issued credentials to log into Exostar's Managed Access Gateway (MAG) where SecureForms is located.

Exostar's Managed Access Gateway (MAG) is a consolidated portal for registration, authentication, and account management across applications and services hosted by Exostar and those managed by external entities. Exostar partners with Raytheon and provides secure access to several of their applications behind MAG.

Additional information about MAG can be accessed here.

Enterprise Access Gateway (EAG) is an Exostar service that allows users access to MAG, and applications and services available through the platform, using their company-issued credentials. If you do not have an EAG account, you can request one by going to http://security.it.ray.com/FederatedSSO/EAG/RSP.html.

For information on how to use EAG to access SecureForms, please reference the EAG User Guide from the EAG Training Resources page.

Role Permissions and Responsibilities

The **RTX Functional Administrator** role allows users to execute the following actions:

- View and administer form assignments workflows
- Modify and maintain email content, including the senders and recipients
- Run/View reports
- Manage users' roles
- Modify banner content/messages
- View any current forms in progress

Login

Users that need to access SecureForms need two accounts: one under EAG and a second for SecureForms.

After requesting an EAG account at http://security.it.ray.com/FederatedSSO/EAG/RSP.html from within the RTX network, activating and linking it to their SecurID, they need to email supply.chain.technology@raytheon.com and request an account under EXO115419854.

When submitting the request, users should specify which User role they need: **Basic User** or **User with PII**. If the latter, they should confirm they completed RTX' PII training. Once the second account is activated, they need to connect it as a child of the EAG account.

Follow the steps below to use EAG once connected:

1. Log into https://portal.exostar.com.
2. Select **Login Using Company Credential (EAG)**.

3. On the **Single Sign On** page, select **RTX** from the dropdown and click **Login**.

4. Enter your Raytheon credentials and click **Submit**.

5. MAG validates your identity using your RTX SecureID credentials, and directs you to the Home tab of MAG where applications display.

   NOTE: Although RTX users are being issued with new Public Key Infrastructure (PKI) cards, the cards will not yet replace Raytheon SecureID credentials as a means of logging into Exostar, including EAG and applications within MAG.

6. Under the **My Applications** tab, locate **RTX SecureForms** and click **Launch.**

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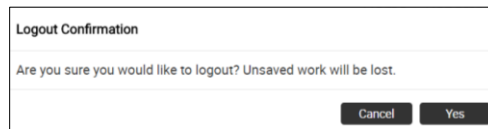
Dashboard

RTX Functional Administrators can conduct various tasks from the Dashboard. On the top right of the page, the system displays the user's **Name** and **Role**. Click the **User Icon** to display links to the user's profile and to logout.

Home | Reports | Contact Us   Eric Skywalker 👤 ▾
Raytheon Functional Administrator
     My Profile
     Logout
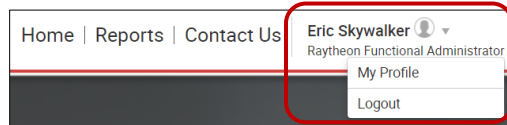
My Profile displays the Login ID, Organization Name, Application role, and user Contact Information.

My Profile

Eric Skywalker

Login ID: skywalkere_7789@fis.evincibletest.com

Organization: Raytheon Egrc Buyer Org 385 Essex Court , Yuba City, CA, US - 95993

Application Role: Raytheon Functional Administrator

Contact Information

Primary Phone * : (703) 793-7800

Secondary Phone * :

Email Address * : evwexostarqa@gmail.com
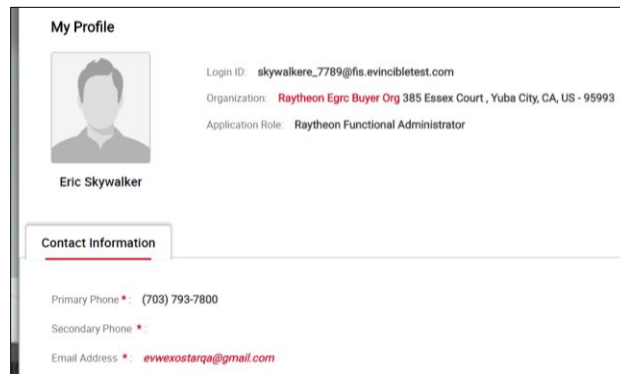
The **Logout** prompts a popup **Logout Confirmation** screen. Click **Yes** to end your session or **Cancel** to resume.

Logout Confirmation

Are you sure you would like to logout? Unsaved work will be lost.

Cancel   Yes

The body of the dashboard contains tiles split into two groups outlining **Activities** and **Administrative** functions. Some tiles are visible only to the Technical Administrator.

Activities

Form Requests   Suppliers   Reports

Administration

Email Template   Banner
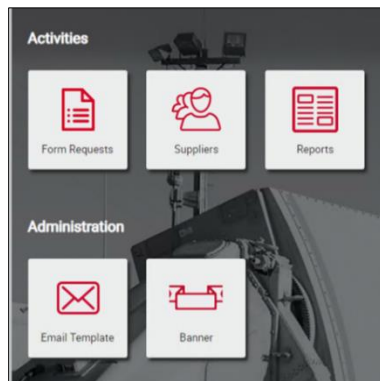
Assigning and Reassigning Forms to Suppliers

RTX Functional Administrators have the ability to assign and reassign forms to suppliers with in a designated organization. The steps below outline these processes.

To Assign a Form:

1. From the Dashboard, click the **Form Requests** tile under **Activities.**

2. Click the **New Form Request** button.

3. The **Add New Form Request** pop-up displays.
    a. For users who are provisioned, select the **System Form, Supplier Organization,** and **User** assignment and then click **Save**.

    b. For users who has not been provisioned, the RTX Administrator can uncheck the Existing Users checkbox, enter **First Name, Last Name and Email Address** and then click **Save**.

NOTE: The assigned user receives an email notification advising of the form assignment. The administrator also receives an email stating that the user must be invited to MAG.

To Reassign a Form that is Pending (has not yet been completed by a supplier):

1. From the Dashboard, click the **Form Requests** tile under **Activities.**
2. Locate the form to reassign and click the **Ellipses.**
3. Once the Ellipses expands, click **Reassign**.

Form Requests

	Vendor		Form		Workflow Status		Date Range				
	Vendor ESD # or Name		-- Form -- ⌄		-- Form Status -- ⌄		Start Date 📅	End Date 📅	Search	Clear	

Pending Forms (82)   Completed Forms   Cancelled Forms

Request # ▼	Vendor ▼	ESD # ▼	Form ▼	REF # ▼	Initiated ▼	Status ▼	Progress	Status Date ▼	Assigned	
☐ QDXRGHWQ	New Supplier 130	1649121900	CR-003C		03/19/2018	Pending Provisioning	0%	03/19/2018	ankita gupta, ankita.gupta@exostar.com *	•••
☐ VLJPHJ7A	New Supplier 130	1649121900	Shivani0316		03/16/2018	Form Started	90%	03/16/2018	Org Admin	•••
☐ NMAINUH7	New Supplier 130	1649121900	SAN0316		03/16/2018	Form Started	79%	03/16/2018	Org Admin	•••

Details
Reassign
Cancel

4. From the dropdown, select the user and click **Save**.

Assign User ✕

Assign To User	-- Select User -- ⌄	
		Close Save

NOTE: The newly assigned user receives an email notification advising of the form assignment. Forms can only be reassigned to users who have a SecureForms account.

Viewing and Printing Forms

The **Form Details** page displays supplier attributes, form details, and allows RTX Functional Administrators to print the latest submission and all previously completed submissions of the form they are viewing.

Form Request History

The request history outlines the following information for each form request of the particular form previously sent by RTX to the supplier organization:

- Initialization Date
- Assigned to
- Status Date
- % completed
- Revision Number

Form 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.

Printing Forms

RTX Functional Administrators can only see and download forms, whether completed or in progress. To print the last submitted form, go to the **Downloads** portion of the form details screen and click the **PDF icon** next to **Latest Submitted Revision**.

To view and print any other forms, go to the **Rev.** column of the **Revision History** table, and click the **revision number link** of any form.

Download Completed Forms in Bulk and Upload to RShare

Completed Forms can also be downloaded in bulk. Functional Administrators are responsible for bulk downloading completed forms from SecureForms and uploading them to the RShare site on a weekly basis.

Follow the steps below to bulk download forms:

1. From the Dashboard, click the **Form Requests** tile under **Activities**.
2. Go to the **Completed Forms** tab. Using filter icon, filter by the previous seven days (Monday-Sunday).
3. Select the desired forms for the download by checking the box (maximum 20).

4. Once all applicable forms are selected, click the **Bulk Download** on the bottom left of the screen. Forms are downloaded as a .zip file. The file name is defaulted to **FormDownload.zip**

5. Access the RShare at https://us1.rshare.ray.com/sites/SecureFormsDC/SitePages/Welcome.aspx.

6. Click **Last Documents Loaded** then select the current folder.

7. Open each zip folder. Filenames do not need to be changed and the entire contents of the zip file can be dragged and dropped to RShare the. It is not possible to drag just the zip file to RShare.

NOTE: Folders must not contain more than 4990 forms so new folders can be created (as needed). Folders should be named Folder 001, 002, etc. Because of the search capabilities, it is not necessary to organize forms in folders by date completed.

Managing Users

RTX Administrators can manage all users in SecureForms. This role has the ability to modify roles of any users, both Suppliers and Raytheon across all organization records in SecureForms, along with the ability to deactivate accounts.
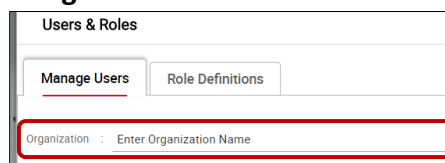
Modifying User Records

To modify user records, follow the instructions below.

1. From the Dashboard, click on the **Users & Roles** tile under **Administration**.
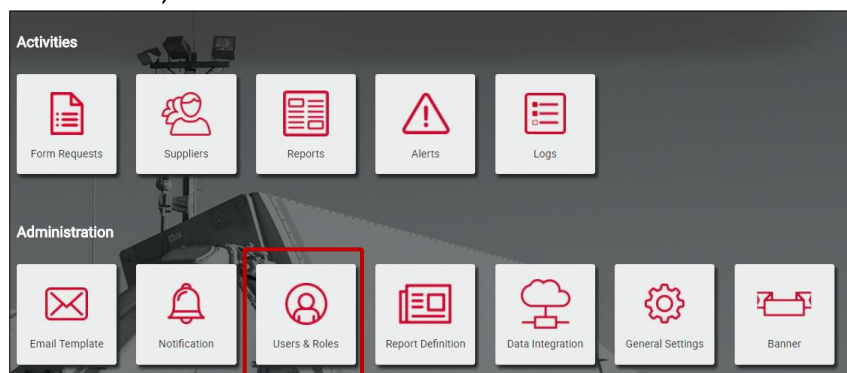
2. The system defaults to the **Manage Users** tab. To search for an Organization, enter the **Organization Name** in the **Organization** text box.

3. Once you enter the Organization Name, all users for the organization display in list view. Click the tool icon to modify the users role.

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

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

Managing System Emails

Functional Administrators can manage system emails sent from SecureForms. Content can be updated and modified at any time. Every email sent from SecureForms has a template. Those templates are divided to target roles specific audiences **(RTX Administrator, Supplier Administrator, RTX User and Supplier 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. **RTX Administrators** can edit this information as needed.

NOTE: 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]".
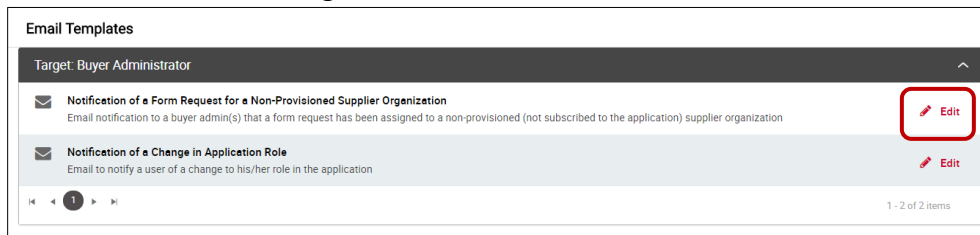
Modifying Email Templates

To modify email templates, follow the instructions below.

1. From the Dashboard, click **Email Template** under **Administration.**
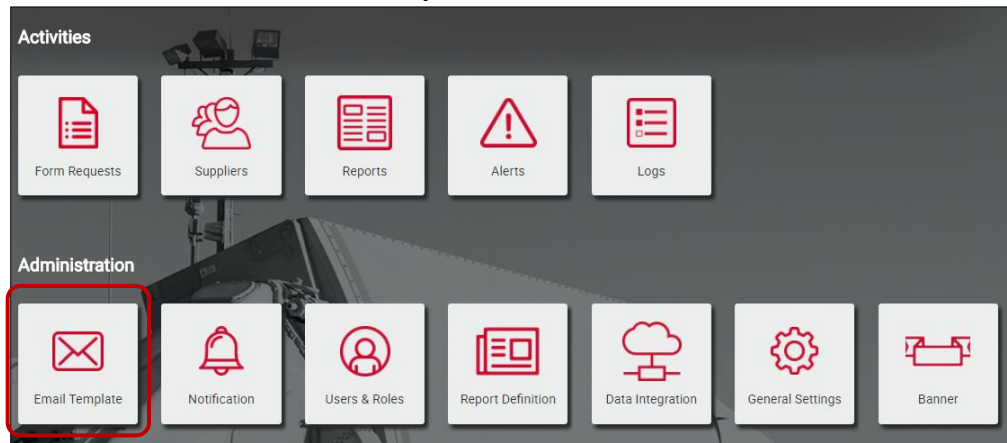
2. Click the **Edit** icon on the right side of the screen next to the email title.

At the top of the template, the following information displays:

- Email Name
- Current Version Number
- Last Updated Date

3. On the left side of the screen, there are several pre-selected fields that can be dragged into the body of the html editor.

Application URL
Buyer Admin
Buyer Admin Email
ESD Number
Event Destination
Exostar ID
Fom Request Date
Form Assignee
Form Assignee Email
Form Display Name
Form Expiration Date
Form Name
Form Request Cancellation Reason
Form Request Due Date
Form Request Number

NOTE: Every time a RTX Administrator edits and saves an email template, the template is incremented to the next version. For example, upon saving edits to version 1 of a template, the system increments the version to version 2, and so forth.

4. Once desired changes are made to the email template, click **Save**.

From	[System (Default)]
To	[Buyer Admin Email]
CC	{##RequesterEmail##}; {##SystemAdminEmail##};
Subject	Action Required: Provide the Org access to Raytheon SecureForms {##SupplierName##}, {##ExostarID##}
Description	Email notification to a buyer admin(s) that a form request has been assigned to a non-provisioned (not subscribed to the application) su

Body

B *I* U ₐᵦₑ   (inherited font) ▾   (inherited size) ▾   A ▾   ◊ ▾   ⋮

Dear {##BuyerAdmin##},

{##FormAssignee##} of {##SupplierName##} {##ESDNumber##} has been assigned the {##FormDisplayName##} by {##Requester##}. In order for them to be able to access the Raytheon Secure Forms application, the following action needs to be taken via the MAG Adoption Module {##ExostarID##}.

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

Additionally, follow the standard process to add the organization and user to Raytheon Secure Forms.

Regards,
Raytheon Supply Chain

Save   Cancel

NOTE: If you would not like to save changes made to the template, click **Cancel.**

Managing Banner Messages

Depending on system permissions, RTX Administrators have the ability to modify banner messages. Banner Messages contain information that needs to be communicated to the suppliers. Follow the steps below to modify banner messages.

1. From the Dashboard, click on the **Banner** tile under **Administration**.
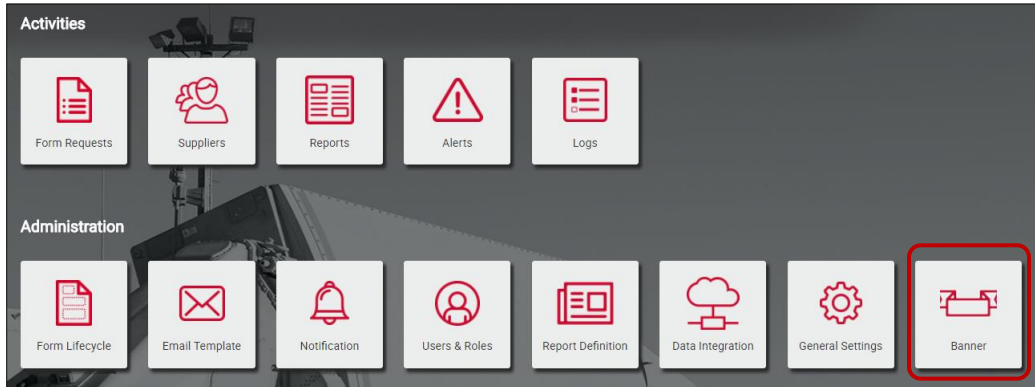
2. To edit an existing banner, click on the edit icon next to the banner end date.

NOTE: To add a new banner, click on the **+ Add Banner** button on the top right side of the screen.

3. The **Manage Banner** pop-up screen displays. Make necessary edits to the **Title, Description, Start Date, End Date and Active Dropdown** and click **Save**.
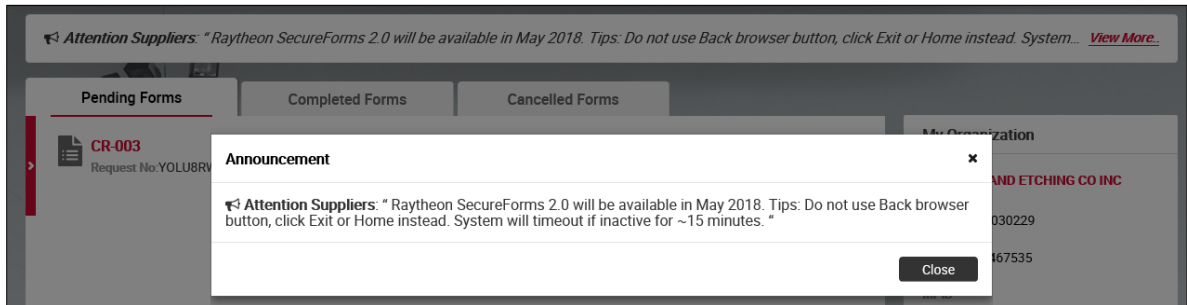

4. The banner will be displayed at the top of the Suppliers' pages as shown below.

If necessary, click **View More** to display the full text when it extends beyond the boundary of the page.

SecureForms is an externally hosted application and cannot be considered a system of record. Functional Administrators are required to periodically extract completed forms from the application using the bulkload functionality described above, and load them to the RShare located at https://us1.rshare.ray.com/sites/SecureFormsDC/SitePages/Welcome.aspx.

Forms are tagged with the following attributes:
- Form Type
- 10 digit ESD number
- Date the supplier completed the form

Files use the following naming convention: **Form Type_XXXXXXXXXX_YYYYMMDD,** where **Form Type** indicates the type of form completed (such as the CR-003), XXXXXXXXXX indicates the ESD number, and YYYYMMDD indicates the date the supplier completed the form.

The RShare site also includes all CR-003s that were completed in the legacy SecureForms application as well as training materials.