



Vendor Quality Manager (VQM) User Guide

March 2020

The EXOSTAR logo, featuring the word 'EXOSTAR' in a bold, sans-serif font with a stylized 'X' and a red diagonal line through it. The logo is centered and overlaid on a background of intersecting red and grey lines that form a large 'X' shape.

EXOSTAR[®]



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DOCUMENT VERSIONS

Version	Impacts	Date	Owner
V1		3/23/20	Erica Evans



INTRODUCTION

Exostar's Vendor Qualification Manager (VQM) is a key component in the Exostar vendor management solution suite. It enables collecting, maintaining, and managing documents and data needed to set up a company as an approved vendor within a buyer organization. VQM speeds up the onboarding process for both the vendor and the buyer. It also reduces the times of vendor approval and certification.

The buyer organization can select a prospective vendor, also called a supplier, to initiate a defined due-diligence evaluation process. During the due-diligence pre-qualification process, the vendor provides the required information using an online form. Once the vendor submits the required due-diligence, the buyer enterprise/business unit qualification team must approve the vendor. This includes one or many approvals, depending on the type of contract. If the enterprise/business unit approves the vendor, they are provisioned into Exostar's Managed Access Gateway (MAG) and the enterprise/business units subscribed applications.

ACCESSING VQM

Buyer Access

To access VQM, the buyer organization must have an Exostar's Managed Access Gateway (MAG) account subscribed to VQM. If the organization has a subscribed MAG account, and a buyer user does not have a profile, contact the MAG Organization or VQM Application Administrator and request a profile be added. For assistance with how to use MAG and obtain a profile, please visit <https://my.exostar.com/pages/viewpage.action?pagelId=32022206>.

Once a buyer user obtains their MAG account, they need an approved two-factor authentication credential. Approved Exostar credentials for VQM are:

- [Phone-based One-Time Password \(OTP\)](#)
- [One-Time Password \(OTP\) Hardware Token with Upgrade](#)
- [Federated Identity Service \(FIS\) Medium Level of Assurance \(MLOA\) Hardware Certificate](#)

If the organization uses the following credentials, buyer users can access VQM via the Enterprise Access Gateway (EAG) solution.

- Government-Issued Common Access Cards
- Northrop Grumman OneBadge
- NASA PIV Card

For information on how to setup your organizations EAG, please visit <https://my.exostar.com/pages/viewpage.action?pagelId=32021977>.

Vendor Access

Vendors can access VQM via a link in the invitation email. When a buyer invites a vendor, an email is sent to the vendor’s email address with a temporary username and password that can be used to access the system. Vendor users do not need MAG credentials to access VQM.

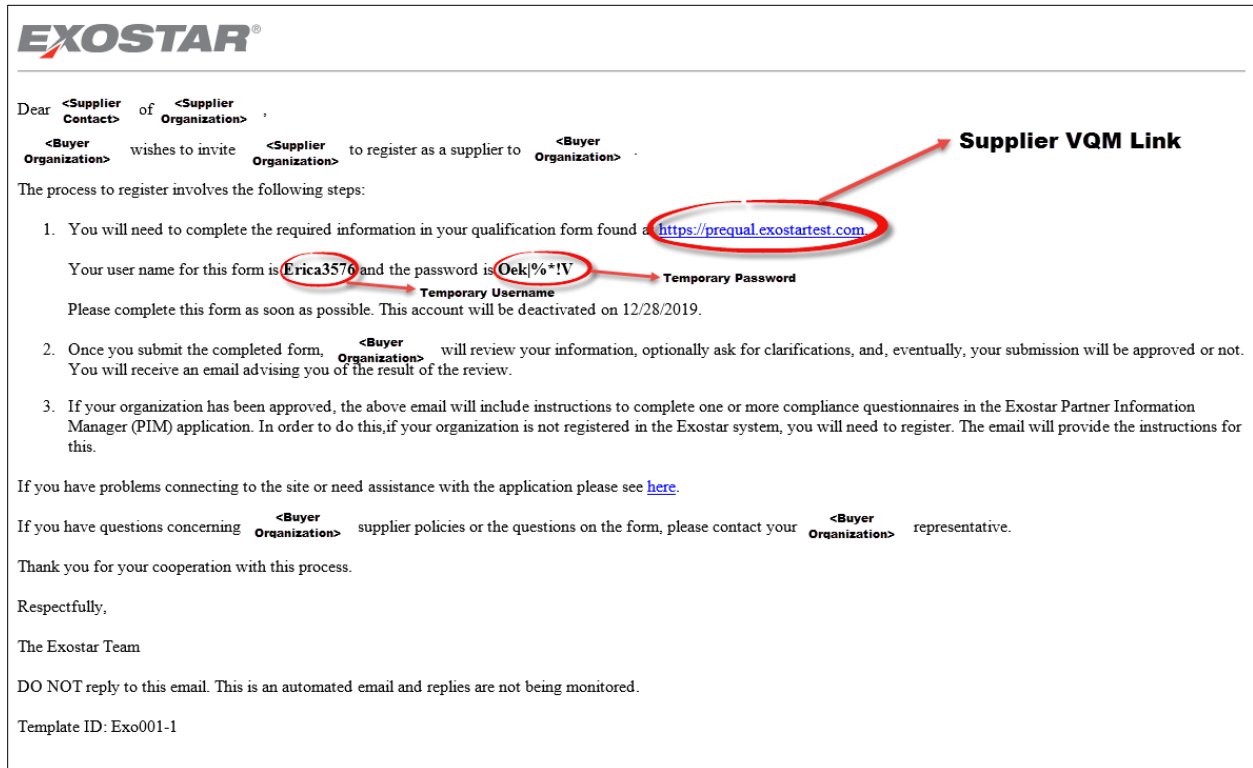


FIGURE 1 VENDOR INVITATION EMAIL

ROLES

Role	Definition
Buyer User	Read-only access. Can access all the invitations, reviews, and vendor response.
Buyer Requestor	Can only submit requests, assign reviewers and approvers to invitation.
Buyer Reviewer	Can only request, review invitation. Assign reviewers to invitations where he/she is a reviewer.

Buyer Approver	Can request, review, and approve invitations. Assign reviewers and approvers to invitations where he/she is an approver.
Buyer Admin	All of the privileges of the User, Requestor, Reviewer, and Approver roles in addition with the ability to assign user role, update user status, and updating the organization contact and summary information.
Supplier	Can answer questionnaires sent by buyers.

TABLE 1 ROLES AND RESPONSIBILITIES

BUYER DASHBOARD

Upon entering the system, the buyer is presented with a dashboard providing important information and allowing quick access to a variety of functions.

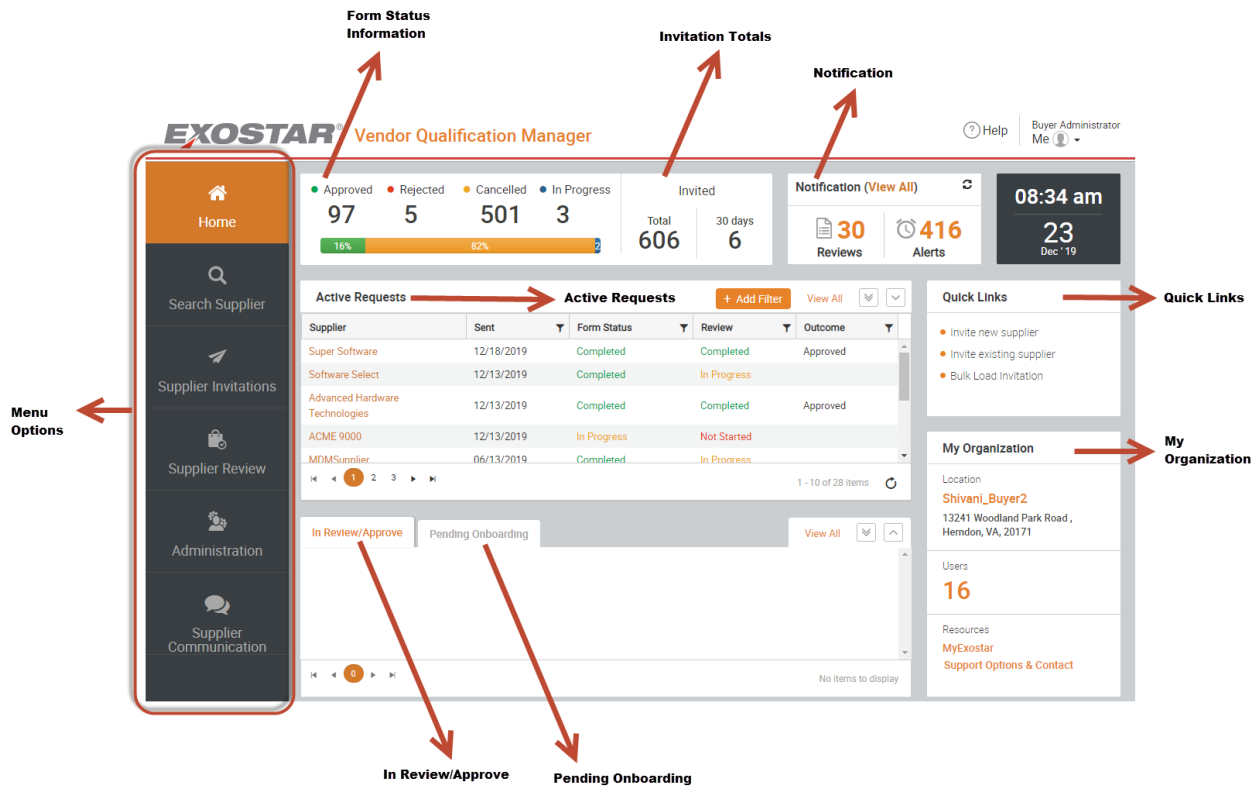


FIGURE 2 VQM DASHBOARD

- **Form Status Information:** Displays the number and percentage of approved, rejected, canceled, and in progress invitations in the system.
- **Invitations Totals:** Displays the total number of invitations in the system, as well as the total number of invitations sent within the last 30 days.

- **Notifications:** Displays the number of invitations ready for review and alerts captured by the system.
- **Quick Links:** Single click links to the often-used processes and functionalities in the product.
- **My Organization:** By selecting the name of your organization, the user is able to view the organizational profile.
- **Pending Onboarding:** Vendors in the process of being onboarded to the appropriate application.
- **In Review/Approve:** Invitations pending review or approval.
- **Menu Options:** The user can access system functionality by selecting one of the options located on the left menu.
- **Active Requests:** All the active requests in the system.

VENDOR INVITATION

Buyer organizations can use VQM to invite vendors to complete a qualification questionnaire. The steps to send a vendor an invitation are as follows:

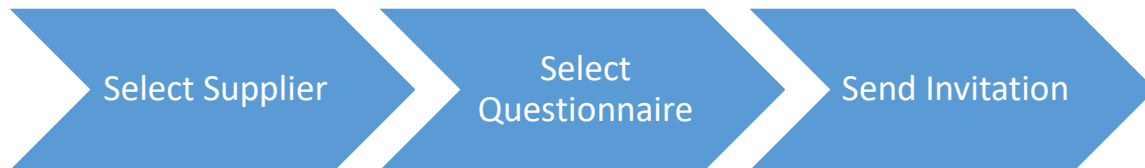


FIGURE 3 VENDOR INVITATION

Select Vendor

The VQM invitation process starts with the buyer selecting a vendor to invite. This task can be completed using three methods; Search for a vendor, add a vendor individually, or add vendors using a bulk upload. Each method is detailed in the sections below.

Search Vendors Steps

The Exostar database contains thousands of vetted vendors. To send an invitation, the buyer can enter information about a potential vendor and have VQM search to see if the vendor already exists. If the vendor exists, the buyer ensures all contact information is correct and sends the vendor an invitation.

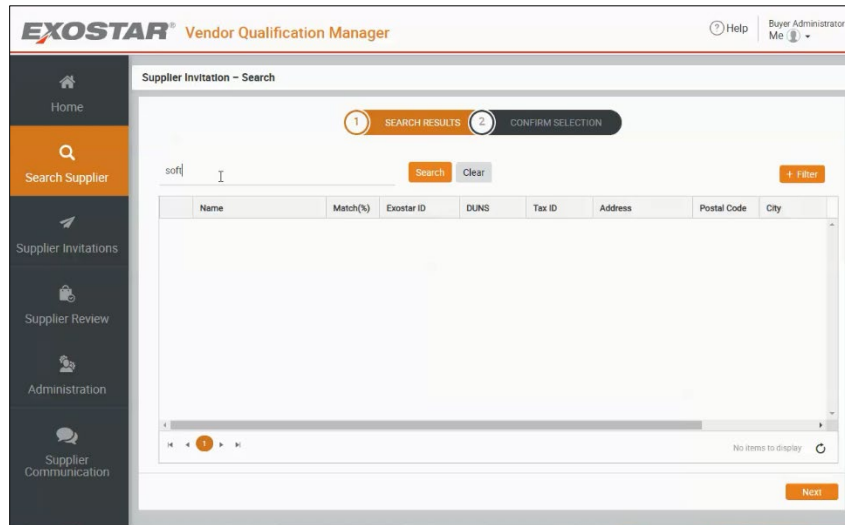
1. Access VQM through MAG.

The screenshot shows the EXOSTAR MAG Announcements page. At the top, there are navigation links for 'Billing and Support', 'Logout', and a settings icon. Below the header, there are tabs for 'Home', 'My Account', 'Administration', 'Registration Requests', 'Reports', and 'Adoption'. A legend indicates the status of applications: Active (green check), Action Required (red triangle), Access Pending (blue circle), and Access Suspended (red X). The main content area shows a table of announcements. The first announcement is for 'Exostar VQM - Vendor Qualification Manager' with a status of 'Open Application' and a last access date of '23 Dec, 2019 10:02 AM EST'. A red arrow points to this announcement, which is labeled 'Exostar VQM'.

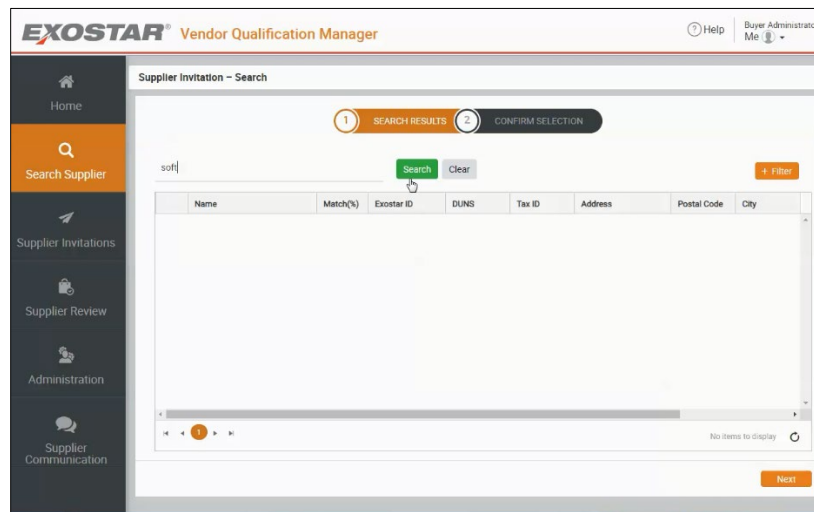
2. From the VQM Dashboard, select Search Supplier.

The screenshot shows the EXOSTAR Vendor Qualification Manager dashboard. The top navigation bar includes 'EXOSTAR® Vendor Qualification Manager', 'Help', and 'Buyer Administrator Me'. The dashboard features a summary section with statistics: 103 Approved, 6 Rejected, 514 Cancelled, and 4 In Progress. It also shows 627 Total and 5 Invited (30 days). There are 3 Reviews and 14 Alerts. The main content area is divided into 'Active Requests' and 'In Review/Approve' sections. The 'Active Requests' table lists suppliers like EETestCompany, AIRHARDWARE, Supplier4220, 123 Consulting, and Software Select. The 'In Review/Approve' section shows a request for EETestCompany with reviewer Shiv Reviewer and approver Shiv Approver. The left sidebar contains navigation options: Home, Search Supplier (circled in red), Supplier Invitations, Supplier Review, Administration, and Supplier Communication. The right sidebar includes Quick Links, My Organization details (Shivani_Buyer2), and Users (18).

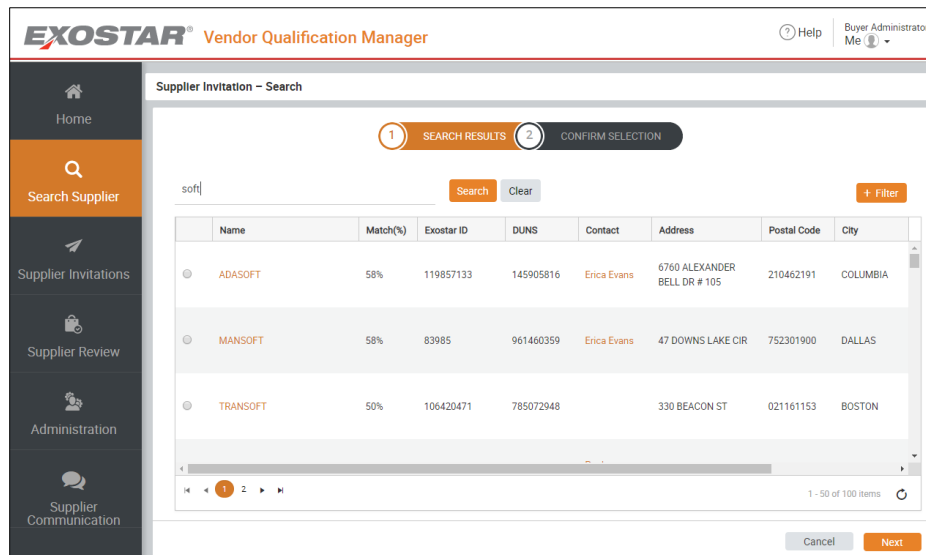
3. The **Search** screen displays. Enter the vendor's **Organization Name** or **ExoID**.



4. Click the **Search** button.

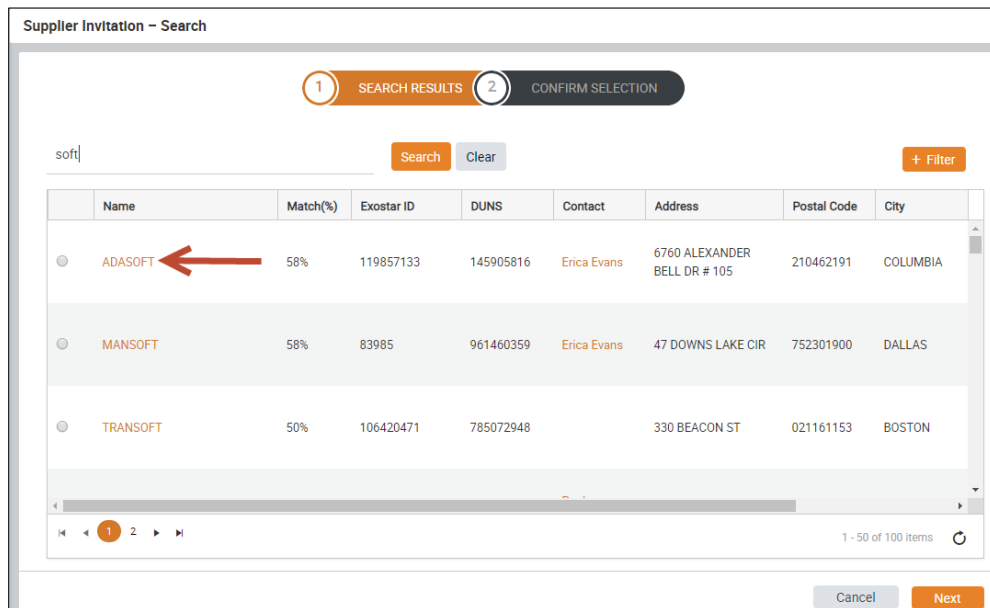


5. The search results display in the **Search Results** table. Scroll through the list to see if the intended vendor is posted on the list.



NOTE: If the vendor is not present in the search result, the buyer must add the vendor manually or through the bulk upload process.

6. Click the **Vendor Name**.



7. A window displays the vendor information. Update the **Contact Name**, **Contact Email**, and **Contact Phone**, if necessary.

8. Click the **Select** button.

ADASOFT

Name : ADASOFT
Address : 6760 ALEXANDER BELL DR # 105
City : COLUMBIA
State : Maryland
Postal Code : 210462191
DUNS# : 145905816
Exostar Id : 119857133
Contact Name : Erica Evans
Contact Email : Erica.Evans@exostar.coi
Contact Phone : 7713010000

Select Exit

9. The row containing the vendor name is highlighted. Click **Next**.

Supplier Invitation - Search

1 SEARCH RESULTS 2 CONFIRM SELECTION

soft Search Clear + Filter

	Name	Match(%)	Exostar ID	DUNS	Contact	Address	Postal Code	City
<input checked="" type="radio"/>	ADASOFT	58%	119857133	145905816	Erica Evans	6760 ALEXANDER BELL DR # 105	210462191	COLUMBIA
<input type="radio"/>	MANSOFT	58%	83985	961460359	Erica Evans	47 DOWNS LAKE CIR	752301900	DALLAS
<input type="radio"/>	TRANSOFT	50%	106420471	785072948		330 BEACON ST	021161153	BOSTON

1 - 50 of 100 items

Cancel **Next**

10. The **Confirm Collection** page displays. Enter a mandatory **Batch Identifier** and optional **Short Description**. Click the **Save** button.

Supplier Invitation - Search

1 SEARCH RESULTS 2 CONFIRM SELECTION

Select a Batch

InviteTest Existing

Short Description

Previous Save

11. The user is sent to the **Supplier Invitation** page. Select the **Batch Identifier** from the dropdown menu.

Supplier Invitation

Manual Entry Search and Select from Suppliers List Bulk Load

Draft Active Closed

Batch Requests Batch Identifier Select Batch Identifier Process Delete

Export to Excel

Supplier	External ID	Address	POC
		available.	

Select Batch Identifier

- EE123ABC
- InviteTest
- New Batch 1018
- new batch1234
- New bulk load tesing batch 1
- New BULK LOAD TEST 1

Process Delete

12. Vendors associated with the **Batch Identifier** display. The buyer can choose to start the invite process by clicking on the **Process** button.

Manually Add Vendor

Please follow the steps below to manually add a vendor:

1. Access VQM through MAG.

Home My Account Administration Registration Requests Reports Adoption

My Applications Legend: Active Action Required Access Pending Access Suspended

Company-Application	Status	Announcements
PIM - Partner Information Manager	Open Application Last Access Date: 18 Dec 2019 09:30 AM EST	
Exostar VQM - Vendor Qualification Manager	Open Application Last Access Date: 24 Dec 2019 10:02 AM EST	

Exostar VQM

Expand All Sections

2. From the VQM Dashboard, select **Supplier Invitations**.

EXOSTAR[®] Vendor Qualification Manager

Help Buyer Administrator Me

Home

Approved 103 Rejected 6 Cancelled 514 In Progress 4

Total 627 30 days 5

Notification (View All)

3 Reviews 14 Alerts

12:47 pm 16 Mar '20

Search Supplier

Supplier Invitations

Supplier Review

Administration

Supplier Communication

Active Requests

+ Add Filter View All

Supplier	Sent	Form Status	Review	Outcome
EETestCompany	02/21/2020	Completed	Not Started	
AIRHARDWARE	02/18/2020	Completed	Completed	Approved
Supplier4220	02/04/2020	Completed	Completed	Approved
123 Consulting	01/06/2020	Completed	Not Started	
Software Select	12/13/2019	Completed	In Progress	

1 - 10 of 30 Items

In Review/Approve Pending Onboarding View All

EETestCompany

Requestor	Reviewer(s)	Approver(s)	Invited	Note(s)
Eric Evans	Shiv Reviewer	Shiv Approver	2/21/2020	0

1 - 1 of 1 Items

Quick Links

- Invite new supplier
- Invite existing supplier
- Bulk Load Invitation

My Organization

Location
Shivani_Buyer2
13241 Woodland Park Road,
Herndon, VA, 20171

Users
18

Resources
MyExostar
Support Options & Contact

3. The **Vendor Invitation** page opens. Click the **Manual Entry** button on the top of the page.

Supplier Invitation

Manual Entry

Search and Select from Suppliers List

Bulk Load

- The **Vendor Invitation – New Entry** page displays. Enter all the information in the **Organization, Contact, and Select a Batch** sections.

NOTES:

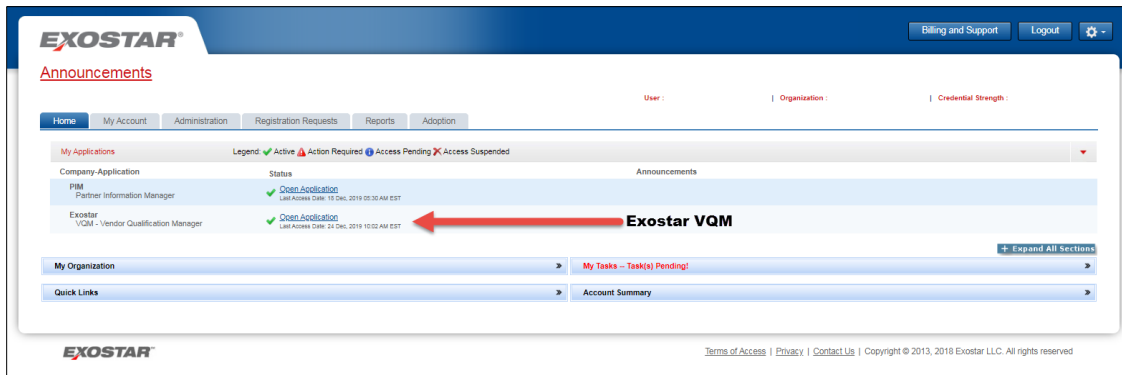
- The **Batch Identifier** is used to allow buyers to send an invitation to multiple vendors by assigning each manually entered vendor a batch number.
 - When the buyer enters information into the **Name** field, the system automatically searches to ensure the vendor does not already exist. If the vendor is not present, close the search window and continue with the instructions below.
- Click the **Add** button. The vendor is added to the batch, and the buyer is returned to the **Supplier Invitations** page.
 - Click the **Batch Identifier** dropdown and select the name you gave the batch.
 - Vendors associated with the **Batch Identifier** display. The buyer can choose to start the invite process by clicking on the **Process** button.

Supplier	External ID	DUNS #	Business Unit	Address	POC	Status
Advanced Testing	123456789	112233445	North	123 Bypass Rd	Erica.Evans@exostar...	Validated

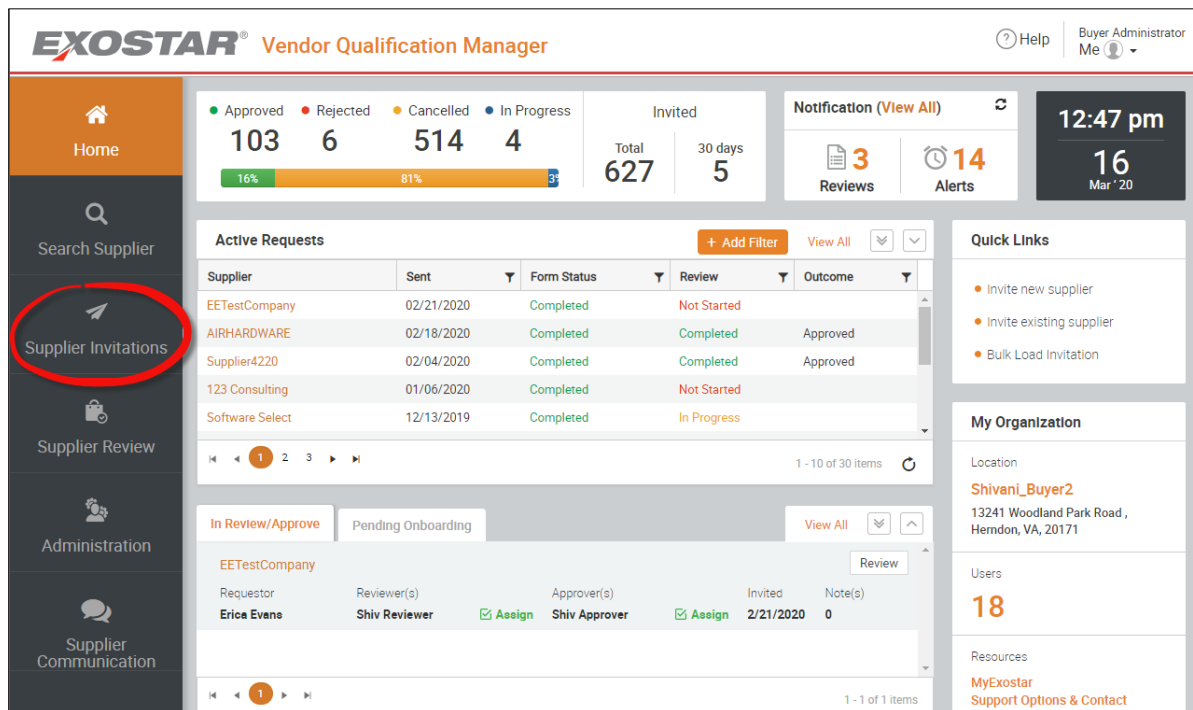
Vendor Bulk Upload

MAG supports a bulk upload feature that allows buyers to add multiple vendors to a template and upload the spreadsheet into the system. Once upload is complete, all the vendors are in the system and the buyer can send invitations. To complete this process:

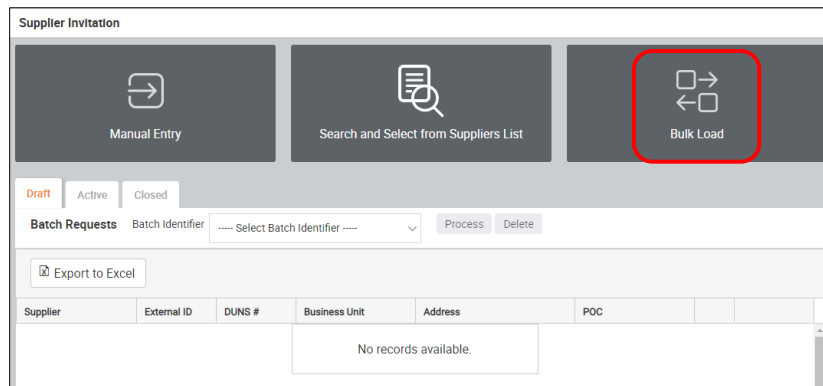
1. Access VQM through MAG.



2. From the VQM Dashboard, select **Supplier Invitations**.



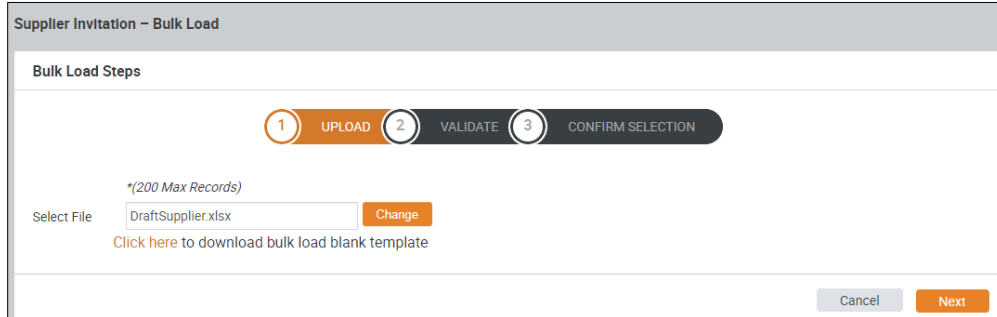
3. Select **Bulk Load** from the top of the **Supplier Invitation** page.



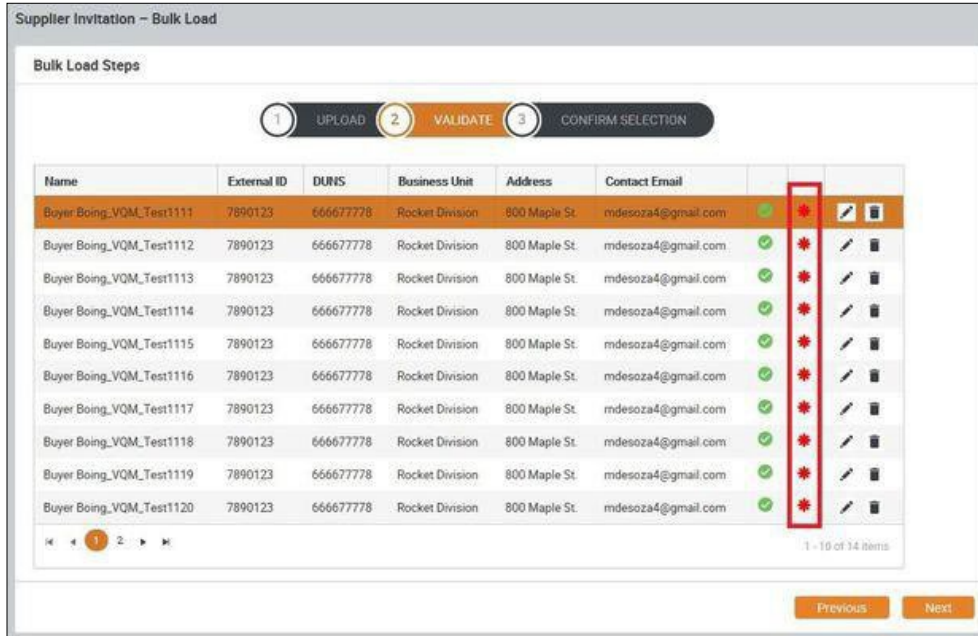
4. Click the hyperlink to download the bulk load template.



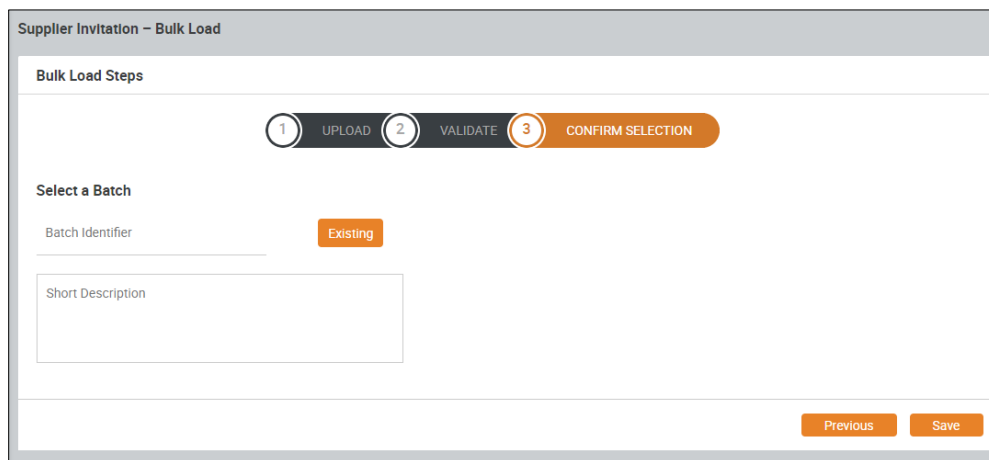
5. After you complete the spreadsheet, click **Browse** and select the file to upload.
6. When the spreadsheet uploads successfully, click **Next**.



- The system validates each item and tries to match it with current vendors. For each vendor in the list (if there are additional vendors that may be a close match), the system displays them if the user clicks the matching icon.



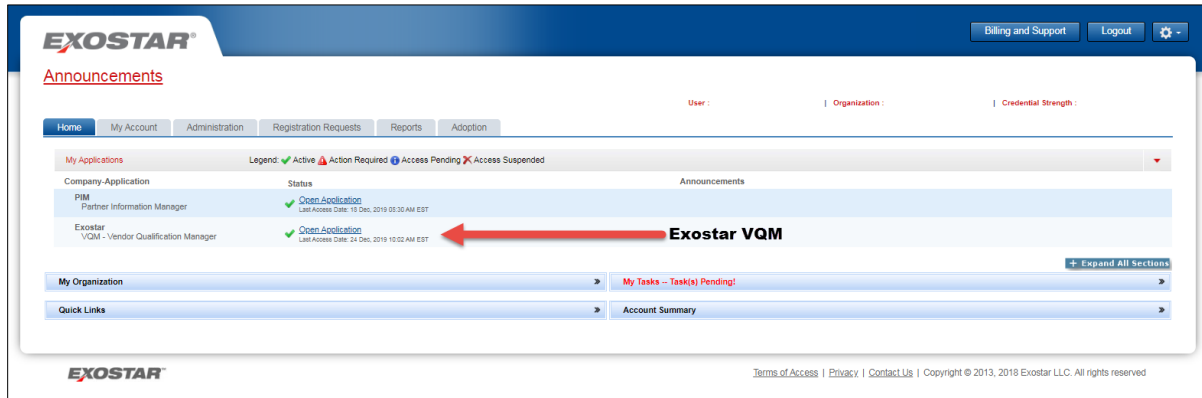
- Click **Next** to continue.
- The user must choose a batch to add to this invitation. The batch name can be an existing or new batch. Optionally, add a description. When finished, click **Save**.



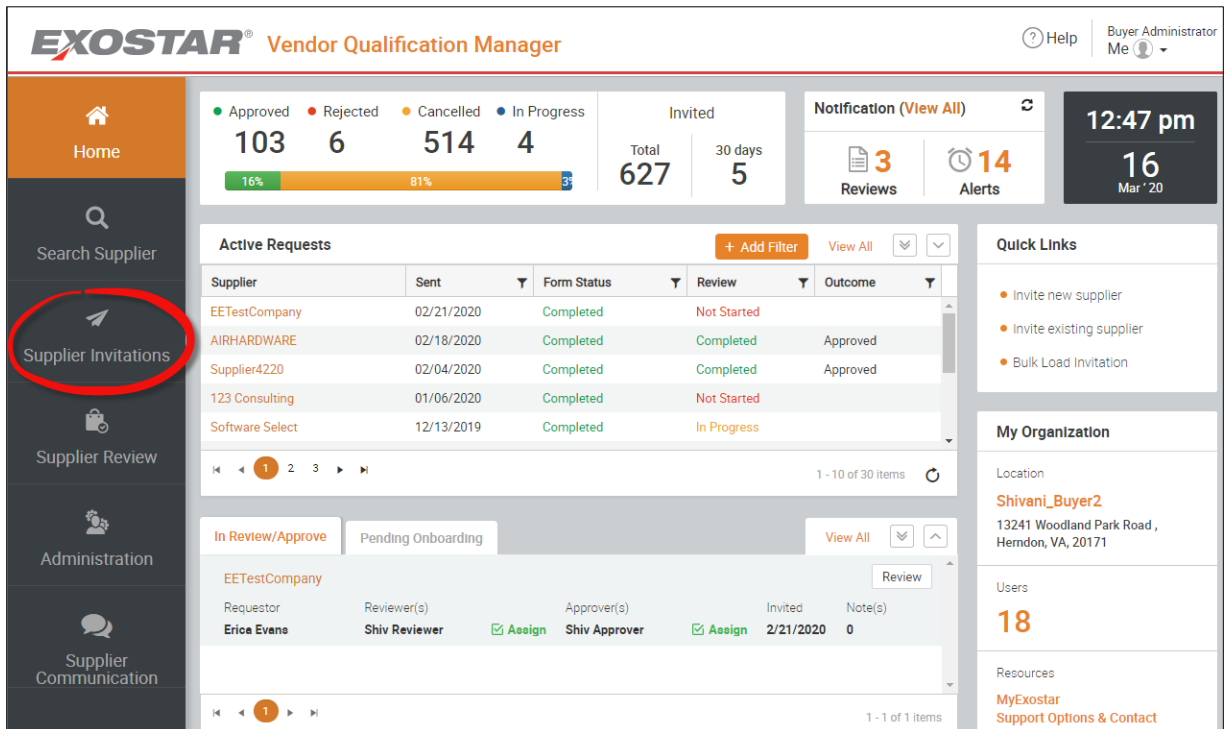
Send Invitation

Once the buyer selects the vendors, they can invite them to complete the VQM questionnaire. The system sends an email to the vendors with a temporary username and password to login to VQM and complete the form. Please follow the steps below to send the invitation:

1. Access VQM through MAG.



2. From the VQM Dashboard, select **Supplier Invitations** from the left menu.



- The **Vendor Invitation** page displays. Select the **Batch Identifier** assigned to the vendor(s).

The screenshot shows the 'Supplier Invitation' interface. At the top, there are three buttons: 'Manual Entry', 'Search and Select from Suppliers List', and 'Bulk Load'. Below these are tabs for 'Draft', 'Active', and 'Closed'. A 'Batch Requests' section contains a 'Batch Identifier' dropdown menu which is currently open, showing a list of options including 'EE123ABC', 'InviteTest', 'New Batch 1018', 'new batch1234', and 'New bulk load tesing batch 1'. To the right of the dropdown are 'Process' and 'Delete' buttons. Below the dropdown is an 'Export to Excel' button and a table with columns for 'Supplier', 'External ID', 'Address', and 'POC'.

- The list of vendor(s) associated with the selected Batch Identifier display. Click the **Process** button.

This screenshot shows the same 'Supplier Invitation' page, but now the 'Batch Identifier' dropdown is set to 'EE123ABC' and the 'Process' button is highlighted. Below the dropdown is an 'Export to Excel' button and a table listing vendors. The table has columns for 'Supplier', 'External ID', 'DUNS #', 'Business Unit', 'Address', and 'POC'. Three vendors are listed: 'ABC Technologies', 'XYZ Engineering', and '123 Consulting', each with a 'Validated' status and a red 'X' icon.

Supplier	External ID	DUNS #	Business Unit	Address	POC	Validated
ABC Technologies		123456789	North	123 Euclid Street	Erica.Evans@exostar...	Validated
XYZ Engineering		987654321	East	789 Comstock Ave	Erica.Evans@exostar...	Validated
123 Consulting		547891236	West	456 Illif Ave	Erica.Evans@exostar...	Validated

- The **Supplier Invitation – Delegations & Timeline** displays. Select the **Reviewers, Approvers, Forms, WorkFlow Timelines, and Renewal information** and click the **Submit** button.

The screenshot shows the 'Supplier Invitation – Delegations & Timeline' page. It features several sections: 'Reviewers' and 'Approvers' with 'Add Reviewer' and 'Add Approver' buttons; 'Forms' with a dropdown menu set to 'Supplier Profile Questionnaire'; 'Workflow Timeline' with fields for 'Response Due' (10 days), 'Review Due' (15 days), and 'Approval' (20 days); and 'Renewal' with a checked 'Allow Auto-Renewal' option and a 'Renew After' field set to 365 days. At the bottom right, there are 'Submit' and 'Cancel' buttons.

Field	Definition	Notes
Reviewer	Individual who will review the form and provide feedback for the approver	Only buyer users with the Reviewer, Approver, or Buyer Administrator role can be assigned as a reviewer
Approver	Individual who will approve the form.	Only buyer users with the Approver or Buyer Administrator role can be assigned as a reviewer
Forms	List of forms that are available to be used as a questionnaire. Only one can be chosen.	The questionnaire is created by business stakeholders. Questionnaire creation and updates are done outside the system
Workflow Timelines	<ul style="list-style-type: none"> • Response Due – The number of days after the invitation is sent for the vendor to complete the form • Review Due – The number of days after the invitation is sent for the reviewer to review the form. • Approval – The number of days after the invitation is sent for the approver to approve the form 	
Renewal	The number of days after approval to re-invite the vendor for the purpose of updating and submitting a qualification questionnaire.	Expiration Date = Date Approved + number of days

6. The **Supplier Invitation – Processing** page displays. Once the status changes to **Submitted**, click the **Next** button. The **Supplier Invitation – Processing** page displays confirming the batch is processed.

Supplier	External ID	DUNS #	Status
ABC Technologies		123456789	Submitted
XYZ Engineering		987654321	Submitted
123 Consulting		547891236	Submitted

7. The **Supplier Invitation – Result** page displays confirming the batch is processed. The system sends an invitation to the vendors in the batch. Click the **Done** button to return to the **Supplier Invitation** page.

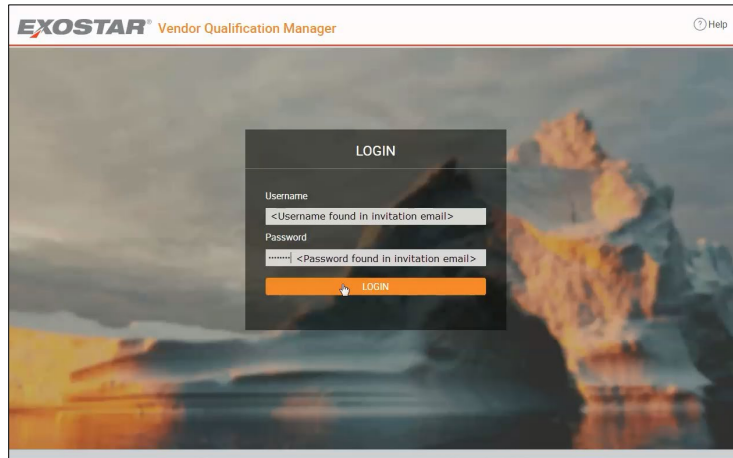
Batch Identifier:	EE123ABC
Invited Suppliers:	3
Requester:	Shivani Buyer

SUPPLIER QUESTIONNAIRE

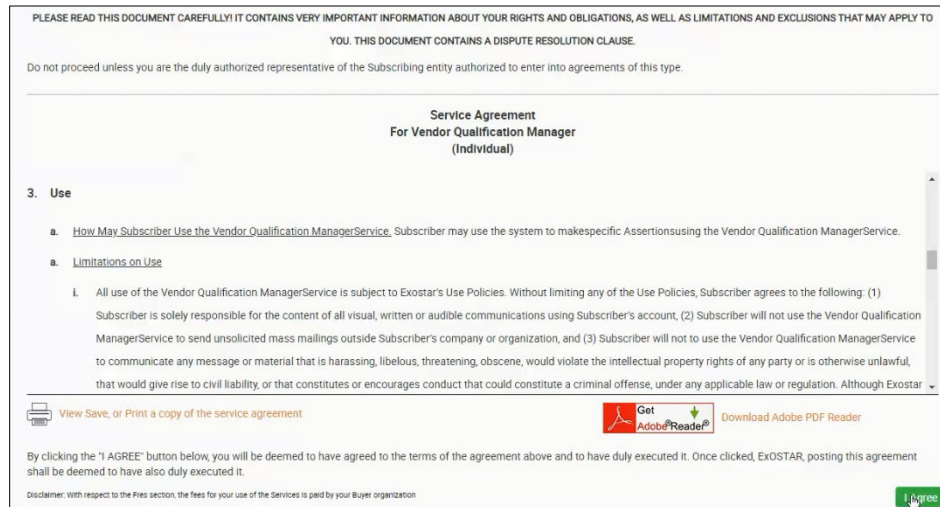
Suppliers can access VQM using the invitation email sent by a buyer. The email contains the link to the application and a temporary username and password. Follow the steps below to complete the VQM questionnaire:

1. Click the application link found in the vendor email.

2. The vendor **VQM Login** page displays. Enter the **Username** and **Password** supplied in the vendor invitation email.



3. Click **Login** button to display the **Terms and Conditions**. After reading through the agreement, if you accept the terms, click the **I Agree** button.



4. A confirmation message displays. Click the **Proceed** button if you agree with the Terms and Conditions. If not, click the **Cancel** button.
5. If **Proceed** is selected, the **Supplier Questionnaire** page displays. Proceed through each tab, answering all required questions and optional questions, where applicable.

NOTE: Questions can take the form of multiple choice, free form text, date entry, or file uploads. Please read the question and enter the information in the correct format. The system checks formatting before submittal and alerts the vendor of data formatting errors.

- a. **Welcome:** Read through the information on the **Welcome** tab and click the next tab.

The screenshot shows the 'Supplier Questionnaire' page in the EXOSTAR Vendor Qualification Manager. The 'Welcome' tab is active. The page header includes the EXOSTAR logo and 'Vendor Qualification Manager'. The user's name 'Erica Evans' is visible in the top right. The main content area displays the buyer's name 'Shivani_Buyer2', email 'shivani.chadha@exostar.com', and contact 'Shivani Buyer'. It also shows an expiration date of '1/16/2020 (10 Days)'. The main text reads: '1. Welcome XYZ Engineering for preliminary supplier approval. This questionnaire has been developed for the purpose of collecting information about your company to share with Shivani_Buyer2. The information you provide will be used to determine your eligibility for doing business with Shivani_Buyer2. Additionally you may be required to fill a Cybersecurity, NIST 800-171 and Conflict Minerals questionnaire once you have been qualified as a supplier to Shivani_Buyer2. By responding to this questionnaire, you represent that you have appropriate authority to complete the questionnaire on behalf of your company. The questionnaire may be amended without notice.' The right sidebar contains sections for 'Notifications (30 days)', 'Communication', 'Download Report', and 'Guidance'.

- b. **Introduction:** This tab contains the Exostar Terms and Conditions and the Exostar Privacy Policy. Click the **Next** button to move to the next tab or **Previous** to move back to the previous tab.

The screenshot shows the 'Supplier Questionnaire' page in the EXOSTAR Vendor Qualification Manager, with the 'Introduction' tab selected. The main content area displays: '2. Introduction: The information that your organization will provide in this form is provided for the use of Shivani_Buyer2 and under the following Exostar Terms and Conditions.' Below this, there are links for 'Terms of Access' and 'Privacy Policy'. At the bottom of the main content area, there are 'Previous' and 'Next' buttons. The right sidebar contains sections for 'Notifications (30 days)', 'Communication', 'Download Report', 'Guidance', and 'Resources'.

- c. **Instruction:** This tab contains information about the process workflow. Click the **Next** button to move to the next tab or **Previous** to move back to the previous tab.

Supplier Questionnaire

Welcome | Introduction | **Instructions** | Submitter Details | Supplier Profile Data

3. Instructions:

In order to complete your information in VQM follow the basic steps outlined below:

Start → Respond to Buyer Invitation → Logon to account → Respond to Form (You are here) → Done

Once approved by **Shivani_Buyer2** please follow the steps below to register your organization with Exostar and acquire two factor authentication credentials to access any required applications assigned by **Shivani_Buyer2**, like Partner Information Manager (PIM) and Secure SourceToPay (SZP).

Start → Respond to Invitation to register with Exostar → Accept Terms & Conditions → Get 2 Factor Credential → Access Application Assigned by Your Buyer → Done

Please be advised all fields in this form that are marked by an * are mandatory and will require an answer. Multiple entries in any Free text fields in the form should be separated by a comma ",". All file uploads in the form must be in pdf format. A copy of your submission will be emailed to the email address you provide once you submit the form.

Previous Next

Notifications (30 days)
No Notifications

Communication

- Communication Board
- Add new Topic

Download Report

- Draft Form
- Blank Form

Guidance

- NAICS Codes
- SBA Size Standards
- Country Codes

Resources

- d. **Submitter Details:** Provide the name and contact information of the person who is completing the form. Click the **Next** button to move to the next tab or **Previous** to move back to the previous tab.

Supplier Questionnaire

Welcome | Introduction | Instructions | **Submitter Details** | Supplier Profile Data

Submitter Details:

Who in your organization is responsible for providing the answers to this form?

Please add your contact information.

Contact Fields marked with (*) are mandatory.

Name *
Jane Doe

Job Title *
Procurement Officer

Phone
703-555-5555

Email Address *
jdoe@companyemail.com

Previous Next

Notifications (30 days)
No Notifications

Communication

- Communication Board
- Add new Topic

Download Report

- Draft Form
- Blank Form

Guidance

- NAICS Codes
- SBA Size Standards
- Country Codes

Resources

- e. **Supplier Profile Data:** Answer all required questions. This is the main qualification questionnaire. Click the **Previous** button to move back to the previous tab.

6. Click the **Submit** button when complete.

NOTE: The **Save for Later** button allows the vendor to save the questionnaire and return to answer the remaining questions later. If the vendor elects to save the questionnaire, none of the information is visible to the buyer. The Supplier has a predetermined amount of time to complete and submit the form before their access to VQM expires.

7. The supplier submits the questionnaire to the buyer for review and acceptance. The questionnaire information is available to the supplier in read-only form.

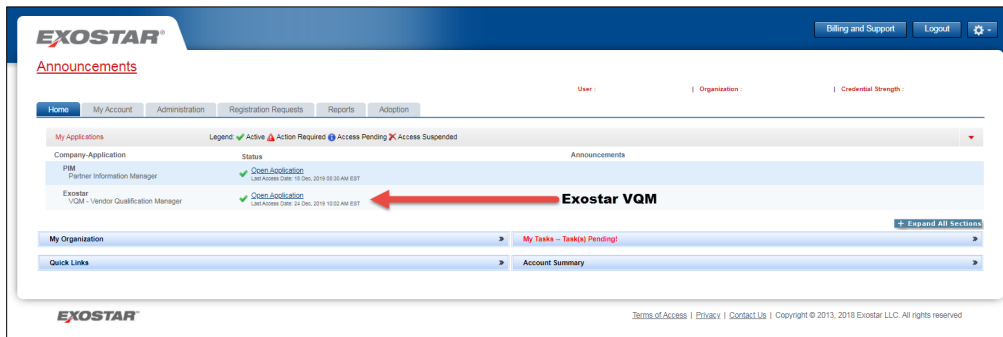
NOTE: Once a questionnaire is submitted, the vendor cannot update the submitted information.

BUYER EVALUATION

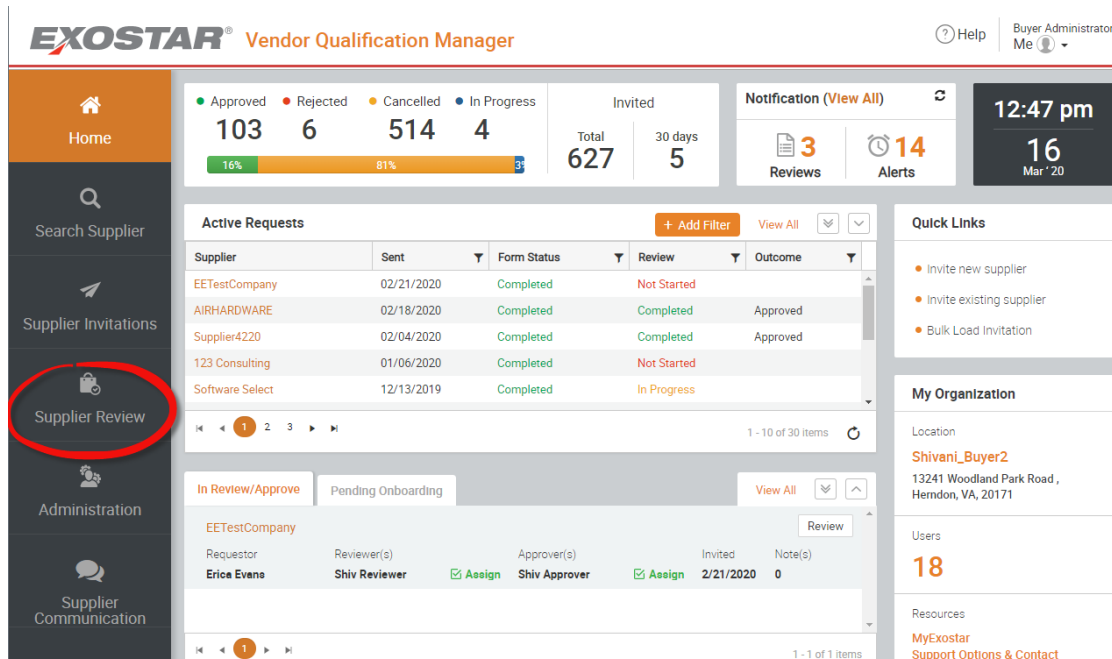
Buyer Evaluation occurs when a vendor completes their form. The buyer can first review and then approve the form. The reviewers and approvers are selected before vendor invitations are sent and only those selected users can access the review and approve functionality in VQM.

Buyer Review

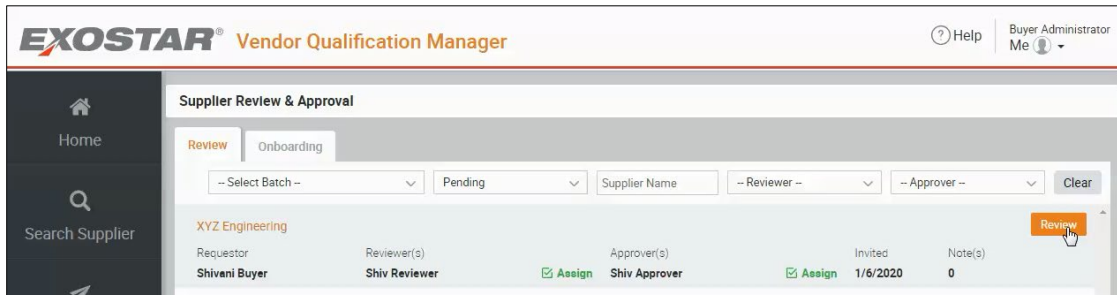
1. Access VQM through MAG.



2. Once the buyer selects VQM from MAG, they are taken to the VQM Dashboard. Click **Supplier Review** on the left navigation.



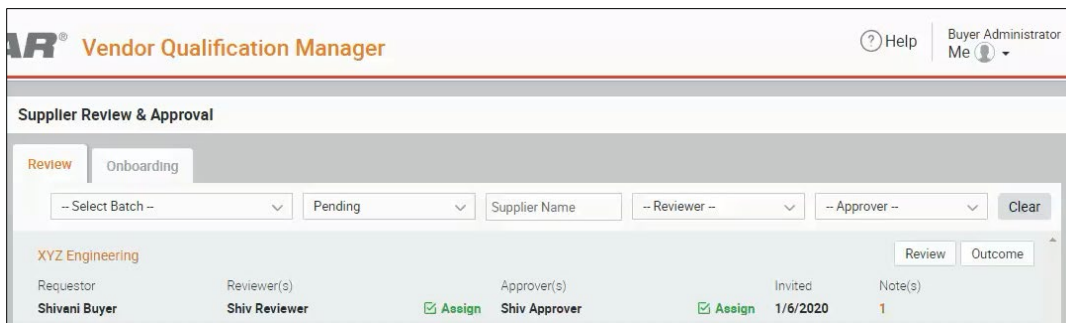
3. A list of pending forms displays. Click **Review**.



4. Enter your comment and click the **Add Review** button.



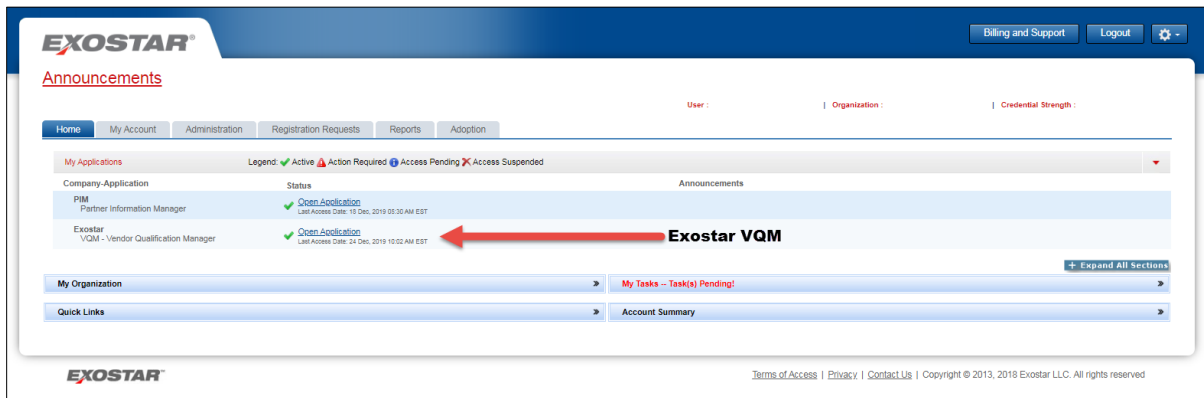
5. The **Note(s)** column is incremented by **1**, indicating a note has been added. The request is now ready for approval.



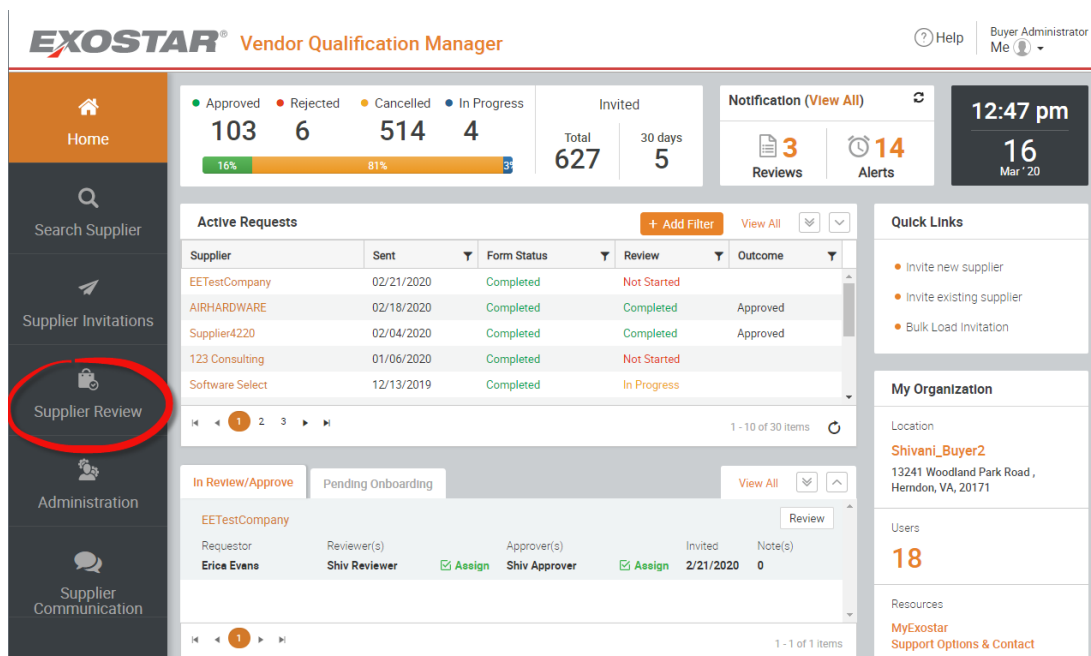
Buyer Approval

After a Reviewer completes a review of the form submitted by a vendor, the buyer with the Approver role can then approve the form. The Approver receives an alert reminding them a form is ready for their approval.

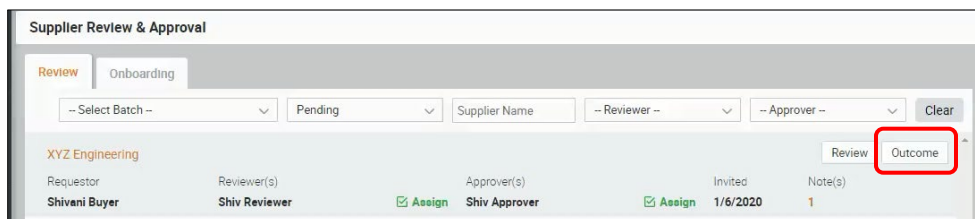
1. Access VQM through MAG.



2. Once the buyer selects VQM from MAG, they are taken to the VQM Dashboard. Click **Supplier Review** on the left navigation.

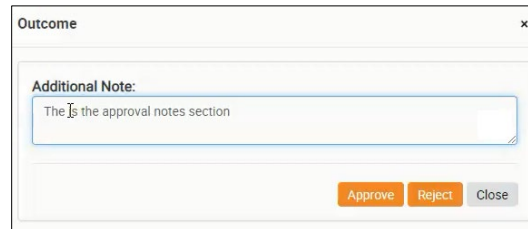


3. Click the **Outcome** button associated with the request you want to approve or reject.



4. Enter notes in the **Additional Notes** box. Click **Approve** or **Reject**.

NOTE: Additional Notes are required in order to complete the approval process.



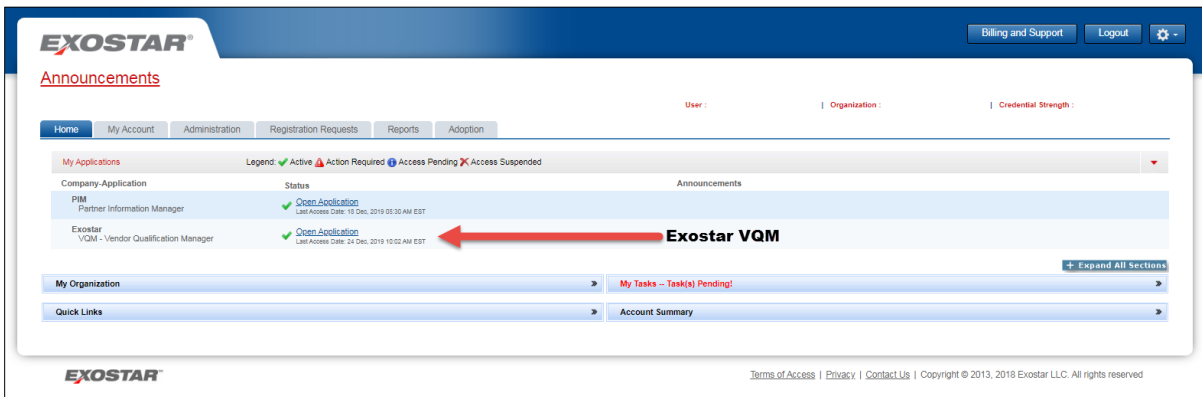
Once a request is approved, that request is added to the list of vendors pending onboarding.

ONBOARDING

The VQM application has a feature to easily push a vendor through to the next step of the onboarding process. Once a vendor is approved, the buyer can choose to onboard a vendor or defer onboarding if they already have access to the required application. This section describes the steps to complete both options.

Vendor Onboarding

1. Access VQM through MAG.



Company-Application	Status	Announcements
PIM Partner Information Manager	Clean Application Last Access Date: 19 Dec, 2019 01:30 AM EST	
Exostar VQM - Vendor Qualification Manager	Clean Application Last Access Date: 24 Dec, 2019 10:02 AM EST	Exostar VQM

2. From the VQM Dashboard, click **Supplier Review** menu item on the left menu.

EXOSTAR® Vendor Qualification Manager

Buyer Administrator Me

Home

Search Supplier

Supplier Invitations

Supplier Review

Administration

Supplier Communication

Approved: 103, Rejected: 6, Cancelled: 514, In Progress: 4

Total: 627, 30 days: 5

Notification (View All): 3 Reviews, 14 Alerts

12:47 pm, 16 Mar '20

Active Requests

Supplier	Sent	Form Status	Review	Outcome
EETestCompany	02/21/2020	Completed	Not Started	
AIRHARDWARE	02/18/2020	Completed	Completed	Approved
Supplier4220	02/04/2020	Completed	Completed	Approved
123 Consulting	01/06/2020	Completed	Not Started	
Software Select	12/13/2019	Completed	In Progress	

In Review/Approve | Pending Onboarding

Requestor	Reviewer(s)	Approver(s)	Invited	Note(s)
Erica Evans	Shiv Reviewer	Shiv Approver	2/21/2020	0

Quick Links

- Invite new supplier
- Invite existing supplier
- Bulk Load Invitation

My Organization

Location: Shivani_Buyer2, 13241 Woodland Park Road, Herndon, VA, 20171

Users: 18

Resources: MyExostar, Support Options & Contact

3. The **Supplier Review & Approval** page displays. Click the **Onboarding** tab

Supplier Review & Approval

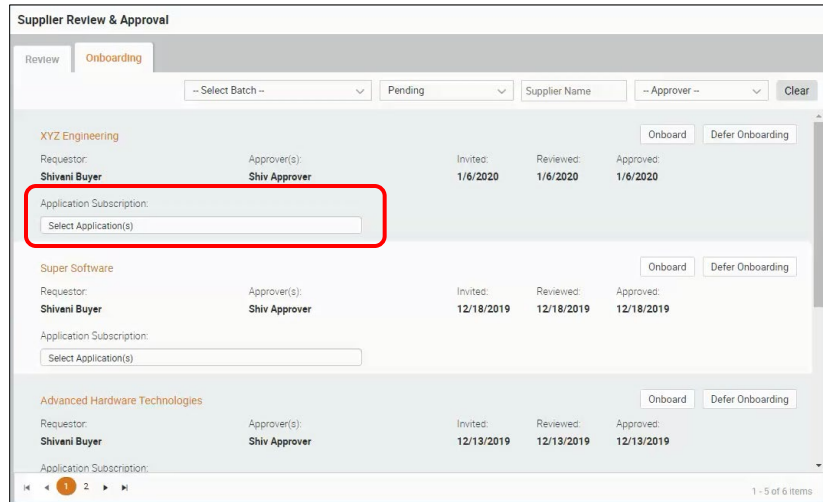
Review | **Onboarding**

- Select Batch - | Pending | Supplier Name | - Reviewer - | - Approver - | Clear

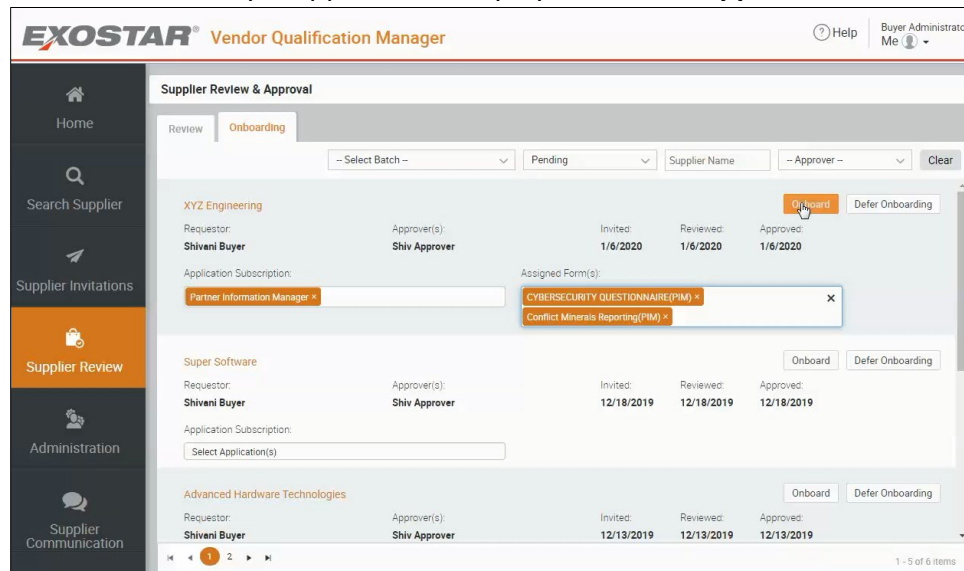
XYZ Engineering

Requestor	Reviewer(s)	Approver(s)	Invited	Note(s)
Shivani Buyer	Shiv Reviewer	Shiv Approver	1/6/2020	0

- A list of approved Vendors displays. Click on **Select Application(s)** under **Application Subscription**.

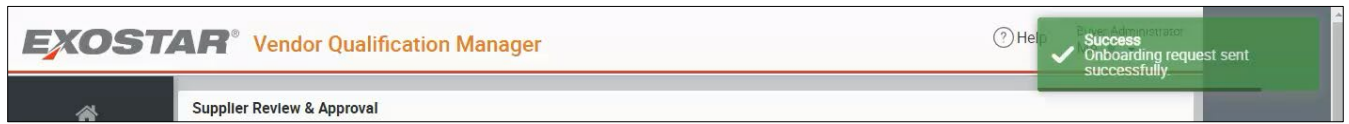


- A list of subscribed buyer applications display. Select the **Application** from the list.



NOTE: Partner Information Manager was chosen for this example. The **Assigned Forms** option is not available for other applications on the list.

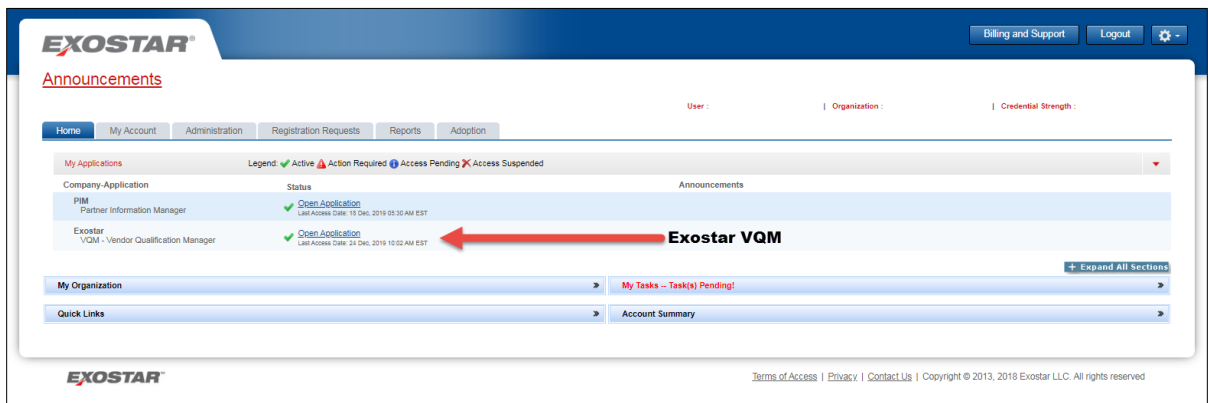
- Click the **Onboard** button. A message displays notifying the user the vendor successfully sent the onboarding request.



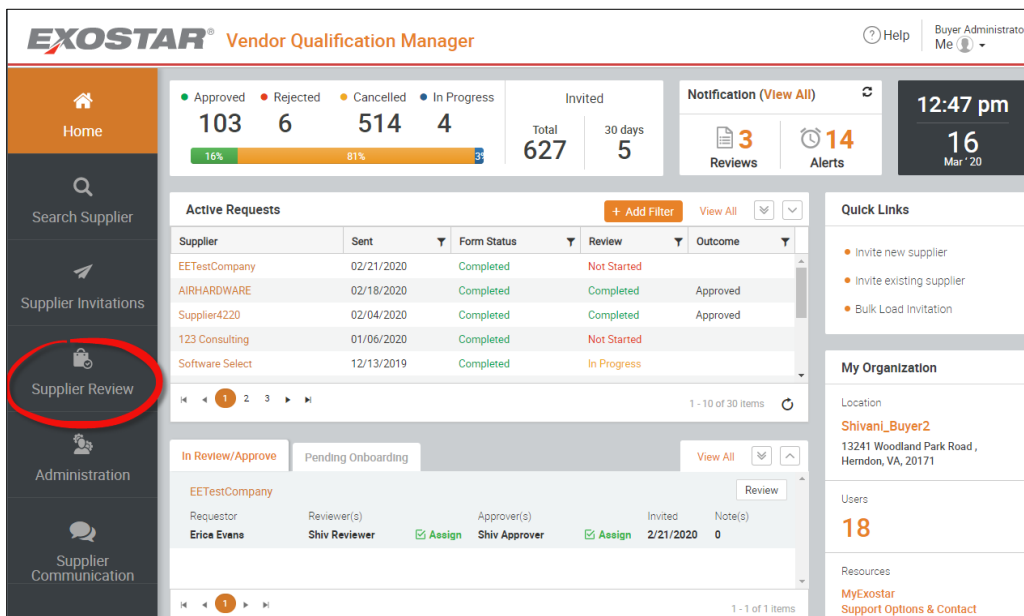
Defer Vendor Onboarding

Follow the process below to defer onboarding:

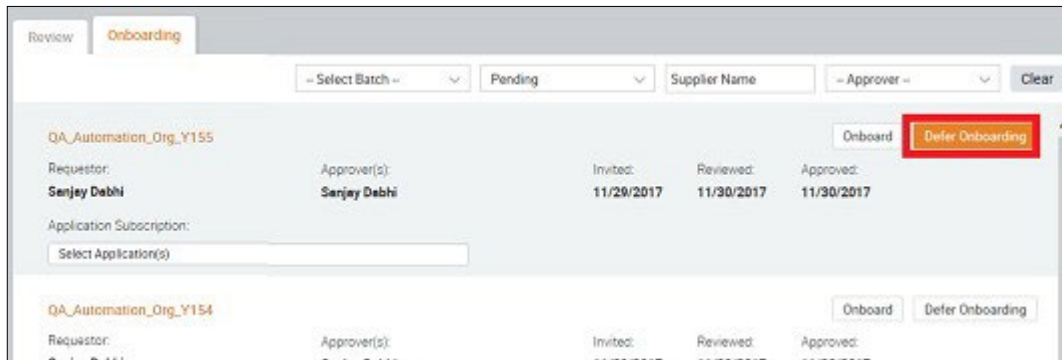
- Access VQM through MAG.



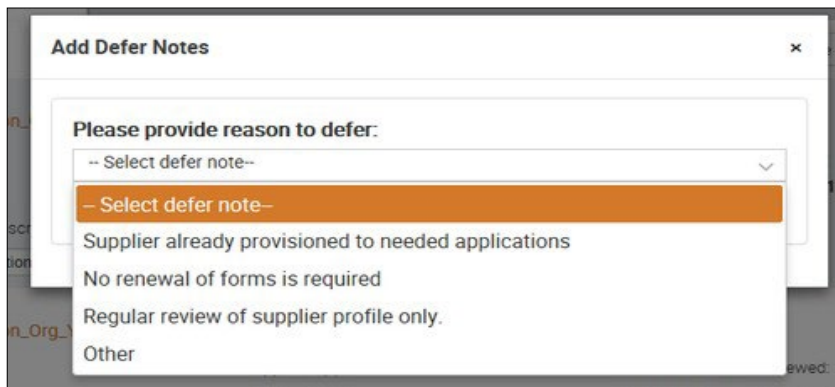
- From the VQM Dashboard, click the **Supplier Review** and proceed to the **Onboarding** tab.



3. Click the **Defer Onboarding** button next to the request that needs deferment.



4. In the **Add Defer Notes** popup, select a defer reason from the drop-down.



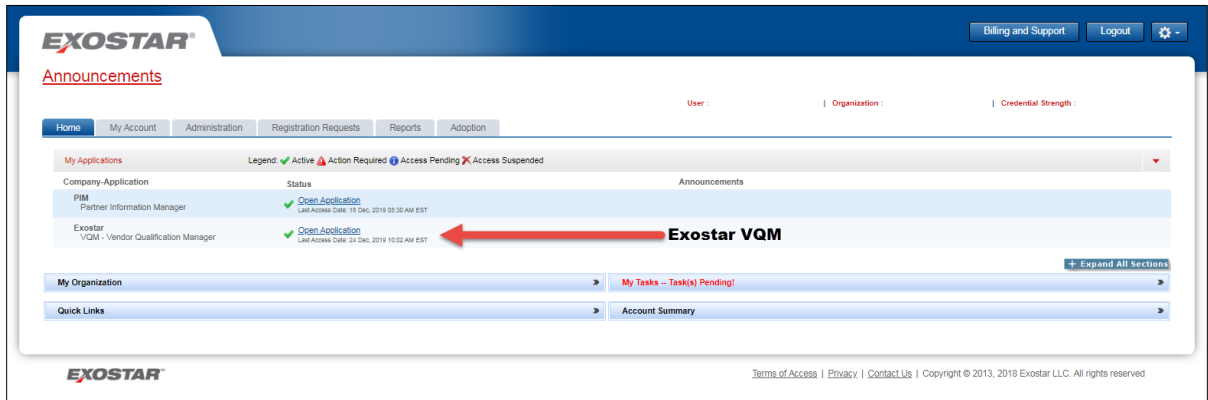
5. Once you provide a reason, click **Add Reason**. A confirmation screen displays. Click confirm to complete the deferment.

NOTE: If you defer onboarding for a vendor, you no longer have the ability to onboard that vendor through VQM unless you resubmit an invitation.

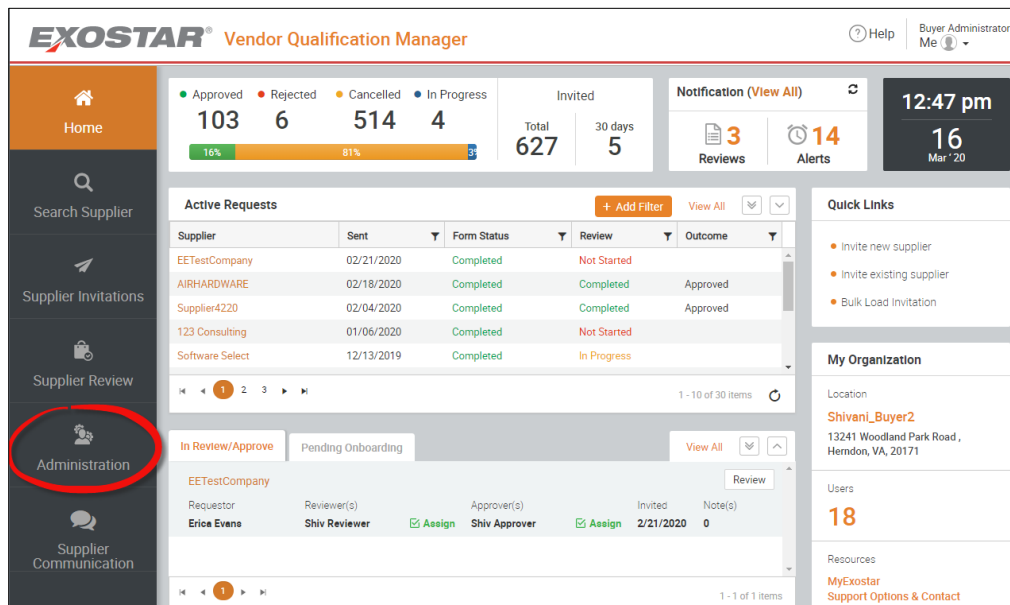
ADMINISTRATION

As an administrator in the VQM system, you can manage users. Follow the steps below:

1. Access VQM through MAG.



2. From the VQM Dashboard, click the **Administration** option in the left menu.



- The system displays a list of all buyer users with access to the system. To change role of a user, click the wrench and screw driver icon.

Name	User ID	Email	Role	Provisioned	Last Updated	
Scott Armstrong	armstrongs_1234@securepass.exostartest.com	scott.armstrong@exostar.com	Buyer User	01/21/2020	02/24/2020	
Erica Evans	evanse_8200@securepass.exostartest.com	Erica.Evans@exostar.com	Buyer Administrator	02/18/2020	02/18/2020	
ExoQABuyer ExoQAUser	exoqausere_0942@securepass.exostartest.com	test@altoromutual.com	Buyer User	07/14/2017	02/12/2020	
Jungbo Hong	hongj_1030@securepass.exostartest.com	Jungbo.Hong@exostar.com	Buyer Administrator	04/25/2019	02/10/2020	
ExoQABuyer ExoQARequestor	exoqarequestore_9353@securepass.exostartest.com	elmameltzer@gmail.com	Buyer User	07/19/2017	02/01/2020	
ExoQABuyer ExoQAReviewer	exoqareviewere_0775@securepass.exostartest.com	jbob2041@gmail.com	Buyer User	07/19/2017	01/24/2020	
Shiv Reviewer	reviewers_8489@securepass.exostartest.com	Ankita.Gupta@exostar.com	Buyer Reviewer	08/27/2018	12/05/2019	
Shiv Approver	approvers_8830@securepass.exostartest.com	Ankita.Gupta@exostar.com	Buyer Approver	08/27/2018	12/05/2019	
Shiv Requestor	requestors_8469@securepass.exostartest.com	Ankita.Gupta@exostar.com	Buyer User	08/27/2018	11/24/2019	

- The **User Management** window opens. Use checkboxes to change roles. Click **Update**.

User Management x

User roles

- Buyer Administrator
- Buyer Requester
- Buyer User
- Buyer Reviewer
- Buyer Approver

User Status

Active

Close
Update

COMMUNICATIONS

The system allows for communication between the buyer and vendors through an online message board. This functionality allows both parties to securely communicate issues and concerns. The steps below detail how suppliers and buyers can securely communicate within VQM.

Supplier

- Supplier logs into VQM using the temporary username and password found in the invitation email.

2. The VQM **Supplier Questionnaire** page displays. While displaying **Supplier Profile Data**, the vendor has access to menu items on the right side of the page. Click the **Communications Board** link.

The screenshot shows the 'Supplier Questionnaire' page in the EXOSTAR Vendor Qualification Manager. The 'Supplier Profile Data' tab is selected. The main content area is titled 'General Information' and includes fields for 'Full Legal Company Name of Business As Reportable to IRS *' (Advanced Testing), 'Doing Business As (DBA) Name', 'Address Line 1 *' (123 Bypass Rd), 'Address Line 2', 'Country *' (United States of America), 'State/Province *' (Virginia), 'City *' (Herndon), and 'Postal Code *' (20171). There are expandable sections for 'Geographic Location', 'Functional Areas', 'Company Profile', 'Company Certifications', and 'Opt Out'. A checkbox at the bottom states 'I certify that to the best of my knowledge the above information is correct & hereby certify this information to Shivani_Buyer2'. Buttons for 'Previous', 'Save for Later', and 'Submit' are at the bottom. On the right, a navigation menu includes 'Notifications (30 days)', 'Communication' (with 'Communication Board' highlighted in a red box), 'Download Report', 'Guidance', and 'Resources'.

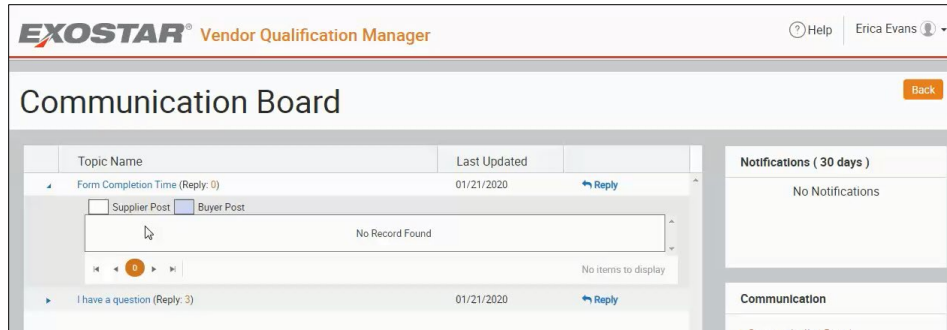
3. The **Communications Board** page displays. Click the **Add New Topic** link.

The screenshot shows the 'Communication Board' page. It features a table with columns for 'Topic Name', 'Last Updated', and 'Reply'. One topic is listed: 'I have a question (Reply: 3)' with a last update of '01/21/2020'. A 'Reply' link is visible next to the topic. On the right, a navigation menu includes 'Notifications (30 days)', 'Communication' (with 'Communication Board' and 'Add New Topic' highlighted in a red box), and 'Resources'. A 'Back' button is located at the top right of the main content area.

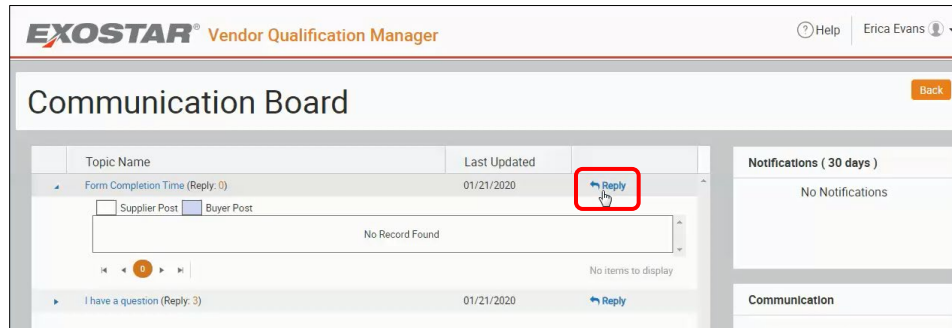
4. In the **Add Topic** window, type the title of the topic and click the **Add Topic** button.

The screenshot shows the 'Add Topic' dialog box. It has a title bar with 'Add Topic' and a close button. The 'Topic:' label is followed by a text input field containing 'Form Completion Time'. At the bottom, there is a green 'Add Topic' button (highlighted in a red box) and a grey 'Close' button.

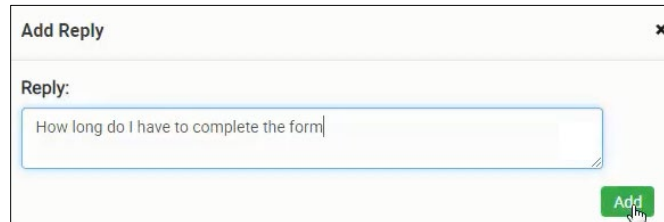
- The topic name displays in the **Topic Name** column. Click the topic name to expand the topic.



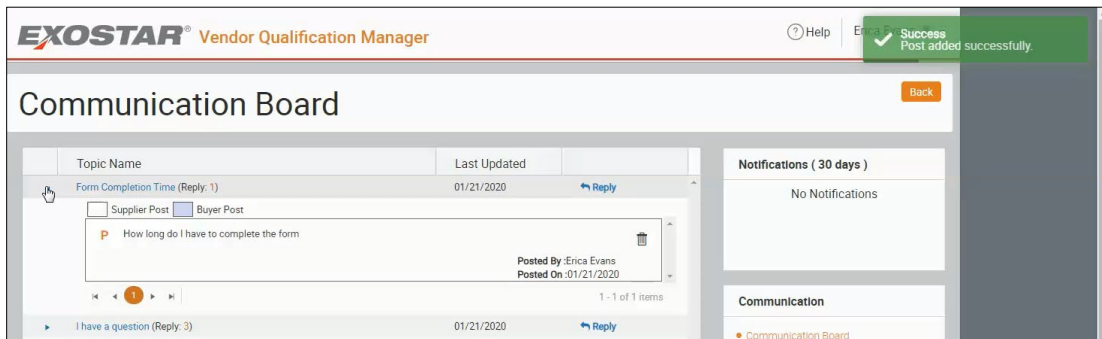
- Click the **Reply** link.



- In the **Add Reply** window, enter the question and click the **Add** button.

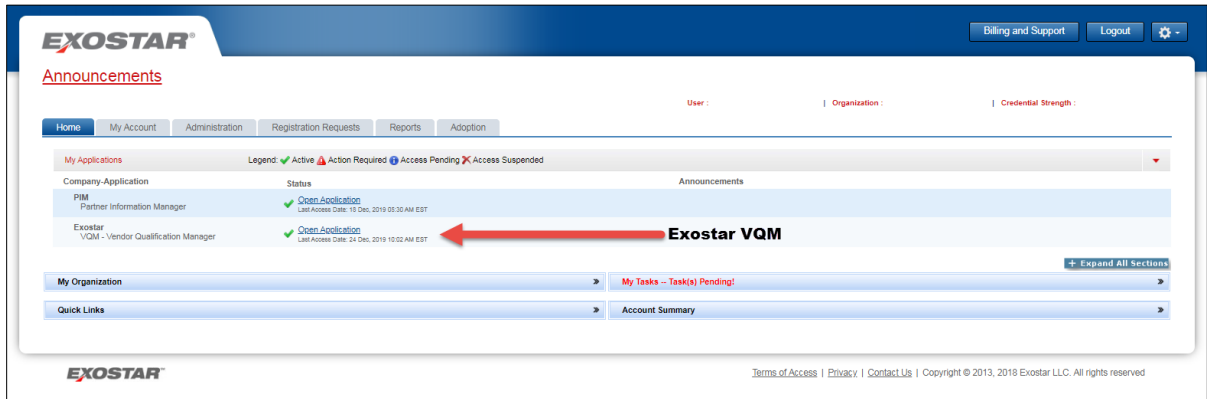


- The **Add Reply** window closes and the question displays under the topic. The buyer now has the ability to view the question and reply.

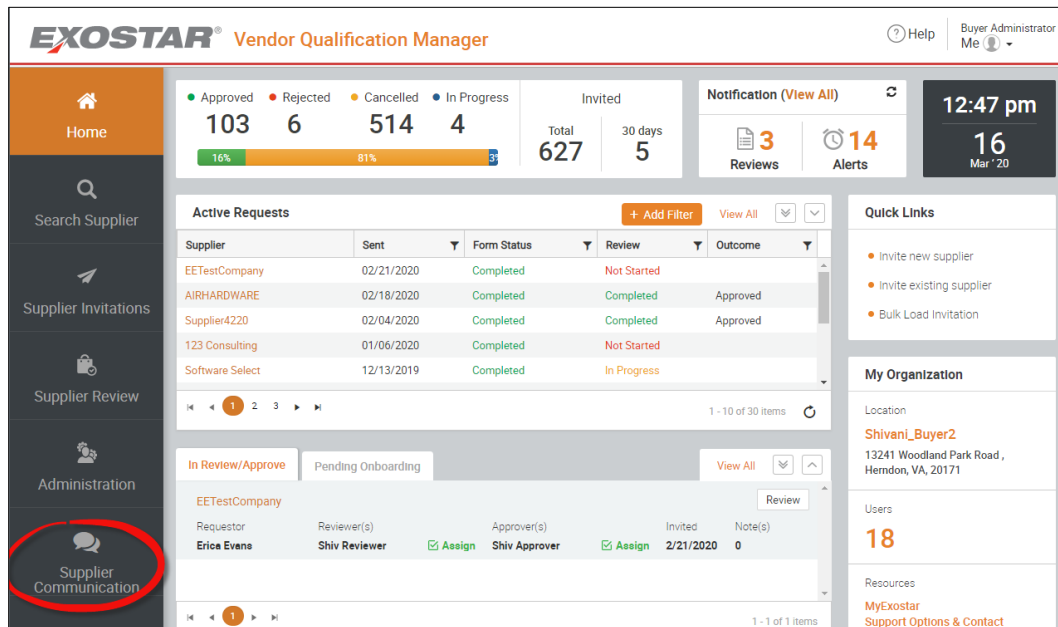


Buyer

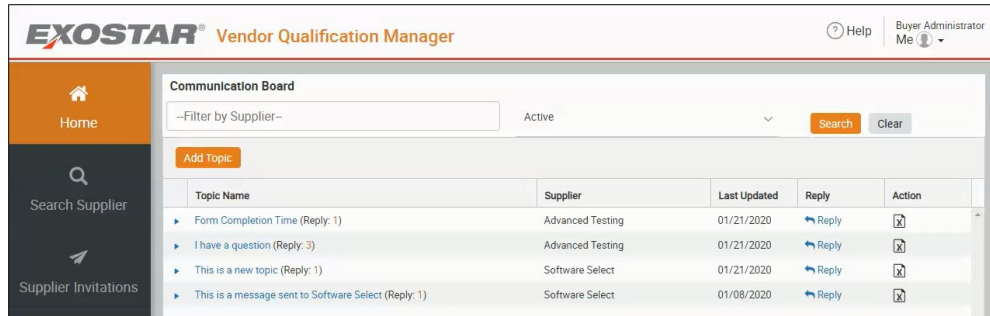
1. Access VQM through MAG.



2. From the VQM Dashboard, click the **Supplier Communication** menu option on the left side.

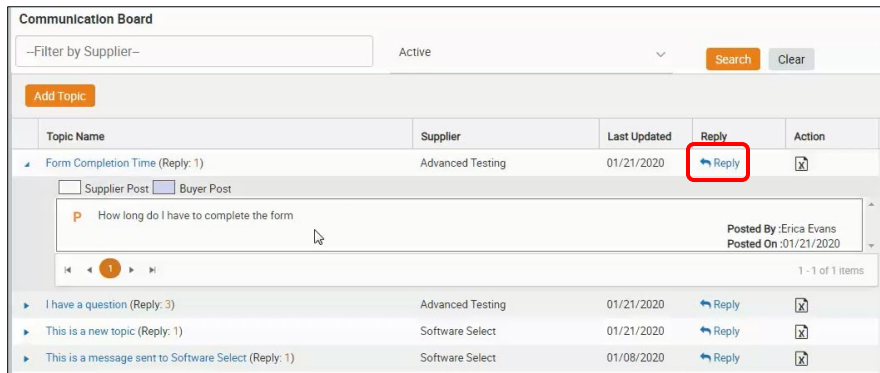


3. The **Communication Board** page displays. Select a topic by clicking on the **Topic Name** link.

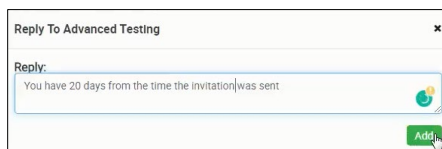


NOTE: The **Action** column allows user to export the communication thread to an Excel spreadsheet.

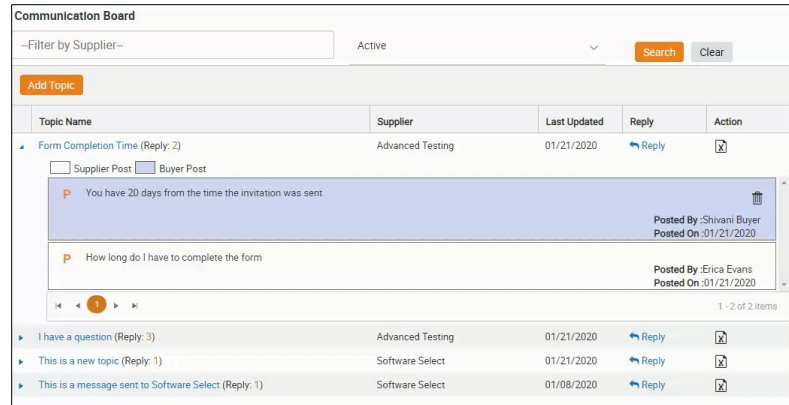
4. The topic thread displays. Click the **Reply** link.



5. The reply window opens. Enter the replay and click the **Add** button.



- Click on the topic name to expand the topic and display the buyer reply. The supplier now has the ability to read the reply and respond.

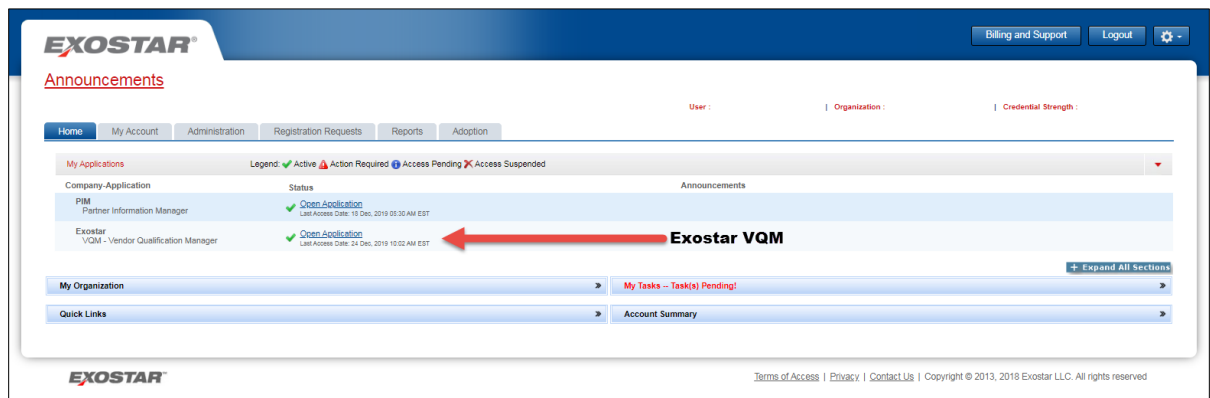


SUPPLIER RE-INVITE

The buyer organization may need a supplier to resubmit their form for review and re-qualification. A supplier can be re-invited to re-submit their form at any time, once they go through the VQM process and have an invitation in the closed tab of **Supplier Invitation**, regardless of outcome decision.

The buyer may re-invite a supplier regardless of the previous outcome: **Rejected** or **Approved**. The same approval flow must be followed as the initial first time invitation. This step is an optional step to the VQM process flow.

- Access VQM through MAG.



2. From the VQM Dashboard, select the **Supplier Invitations** from the left menu.

EXOSTAR® Vendor Qualification Manager

Home | Search Supplier | **Supplier Invitations** | Supplier Review | Administration | Supplier Communication

Approved: 103 | Rejected: 6 | Cancelled: 514 | In Progress: 4 | Total: 627 | Invited: 5 (30 days)

Notification (View All): 3 Reviews, 14 Alerts | 12:47 pm | 16 Mar '20

Supplier	Sent	Form Status	Review	Outcome
EETestCompany	02/21/2020	Completed	Not Started	
AIRHARDWARE	02/18/2020	Completed	Completed	Approved
Supplier4220	02/04/2020	Completed	Completed	Approved
123 Consulting	01/06/2020	Completed	Not Started	
Software Select	12/13/2019	Completed	In Progress	

Quick Links: Invite new supplier, Invite existing supplier, Bulk Load Invitation

My Organization: Location: Shivani_Buyer2, 13241 Woodland Park Road, Herndon, VA, 20171

Users: 18

Resources: MyExostar, Support Options & Contact

3. Navigate to the closed tab of the **Supplier Invitation** page.

EXOSTAR® Vendor Qualification Manager

Supplier Invitation

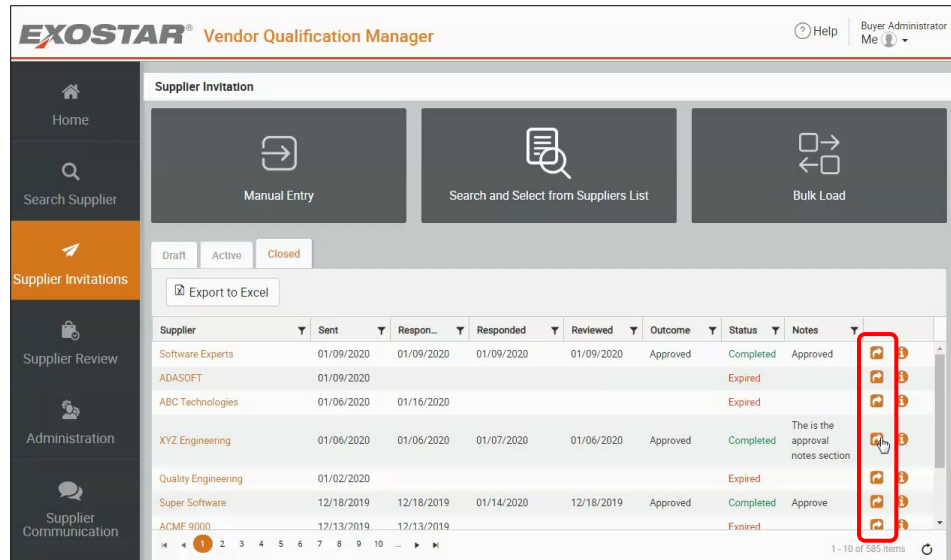
Manual Entry | Search and Select from Suppliers List | Bulk Load

Draft | Active | **Closed**

Export to Excel

Supplier	Sent	Respon...	Responded	Reviewed	Outcome	Status	Notes
Software Experts	01/09/2020	01/09/2020	01/09/2020	01/09/2020	Approved	Completed	Approved
ADASOFT	01/09/2020					Expired	
ABC Technologies	01/06/2020	01/16/2020				Expired	
XYZ Engineering	01/06/2020	01/06/2020	01/07/2020	01/06/2020	Approved	Completed	The is the approval notes section
Quality Engineering	01/02/2020					Expired	
Super Software	12/18/2019	12/18/2019	01/14/2020	12/18/2019	Approved	Completed	Approve
ACME 9000	12/13/2019	12/13/2019				Expired	

- Click the **Re-Invite** icon next to the supplier you want to re-invite.



- The **Supplier Details** window displays. Update contact information if necessary and click the **Next** button.

NOTE: All supplier details are pre-populated with the same supplier details provided in the previous invitation. If the supplier contact information needs to be updated, click the applicable text box to overwrite the information. Click the **Next** button when complete.

The 'Supplier Details' window for 'XYZ Engineering' shows 'Step 1 - Supplier' and 'Step 2 - Batch'. It contains input fields for 'Contact Name', 'Contact Email', and 'Contact Phone'. A 'Next' button is located at the bottom right.

- The **Batch Selection** pop-up displays. Select or create the **Batch** for this invitation and click **Save**.

The 'Batch Selection' pop-up window for 'XYZ Engineering' shows 'Step 1 - Supplier' and 'Step 2 - Batch'. It prompts the user to 'Select a Batch' with a 'Batch Identifier' field (containing 'Existing') and a 'Short Description' field. 'Previous' and 'Save' buttons are at the bottom.

7. The **Supplier Invitation** page displays. Select the **Batch Identifier** and click the **Process** button to send invites to vendors.

EXOSTAR[®] Vendor Qualification Manager

Supplier Invitation

Manual Entry Search and Select from Suppliers List Bulk Load

Draft Active Closed

Batch Requests Batch Identifier EEReinvite Process Delete

Export to Excel

Supplier	External ID	DUNS #	Business Unit	Address	POC	
XYZ Engineering		987654321		789 Comstock Ave	Erica.Evans@exostar...	Validated