



# Partner Information Manager (PIM) Buyer Guide August 2022





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[Document Versioning](#)

<b>Version</b>	<b>Change Overview</b>	<b>Date</b>	<b>Responsible Party</b>
2.2	<ul style="list-style-type: none"><li>• Formatting</li></ul>	05/11/18	Tom McHale
2.3	<ul style="list-style-type: none"><li>• Organization Group Management</li><li>• Raw Data Reporting</li><li>• Button Name Changes</li></ul>	7/23/18	Tom McHale
2.4	<ul style="list-style-type: none"><li>• N – Tier Visibility Pilot</li><li>• N – Tier Contract Forms</li><li>• N – Tier Emails</li><li>• Concise DFARS Form</li><li>• New Conflict Minerals Form</li><li>• PIM - MDM Integration</li></ul>	12/14/18	Tom McHale
2.5	<ul style="list-style-type: none"><li>• Welcome Screen</li></ul>	2/21/19	Tom McHale
2.6	<ul style="list-style-type: none"><li>• Toggle Buyer/Supplier View</li></ul>	5/31/19	Tom McHale
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MAG 7.0	<ul style="list-style-type: none"><li>• Authentication</li></ul>	2/19/21	Beena Nair
MAG 7.3	<ul style="list-style-type: none"><li>• My 2FA Credentials section</li></ul>	8/19/22	Sam Boateng

## [Overview](#)

The purpose of this document is to provide information on the Buyer-side of the Partner Information Manager (PIM) application. This guide outlines the following:

- Access information
- Dashboard overview
- Application navigation
- Reporting

## [Exostar's Partner Information Manager \(PIM\)](#)

Exostar's Partner Information Manager (PIM) is a risk management tool that leverages information from trusted sources to provide a Buying Partner with a Supplier's current and potential risk and impact.

PIM allows an organization to complete a questionnaire (e.g., Cybersecurity, NIST SP 800-171, or Conflict Minerals) once for the partner organization and then later share, with the organization's approval, the same results with other contractors who may also be using the organization's products and services. This *ask once and share* model reduces the burden of completing multiple questionnaires. Additionally, PIM provides contractors with a consistent set of minimum cyber security expectations for Suppliers.

Please see the PIM Form Resources page for additional information about each specific form. The following sections provide a brief overview of each form's purpose.

### [Cybersecurity Questionnaire \(CSQ\)](#)

The Cybersecurity Questionnaire was developed to measure a partner's cybersecurity capability. The information a Supplier Partner provides helps them understand their organization's cybersecurity posture. The questionnaire also helps Buying Partners manage risks with sharing sensitive information.

### [NIST SP 800-171 Questionnaire](#)

The Department of Defense (DoD) now requires all its contractors to protect Covered Defense Information (CDI). As such, the department modified its *Defense Federal Acquisition Regulation Supplement* (DFARS) to address the safeguarding of CDI. The DFARS clause 252.204-7012 requires *covered companies* to use the cyber safeguards described by the National Institute of Standards and Technology (NIST) in Special Publication (SP) 800-171, which NIST created, specifically, for commercial companies who do not operate *federal information systems*, but who receive or create CDI to perform defense contracts.



The information a Supplier Partner provides in the NIST SP 800-171 questionnaire is used by Buying Partners to determine a business's security posture with respect to the required NIST security controls.

### [Concise DFARS / DFARS 252 CS](#)

Prior to PIM 2.4, some Buyers expressed an interest in a Concise NIST/DFARS form, to give buying organizations a high-level snapshot of a Supplier's NIST compliance and CDI flow down obligations. Buyers could then decide as to whether or not they need specific Suppliers to submit a full NIST form, with answers to all 110 controls. This resulted in the development of a shorter and concise NIST/ DFARS form.

As per this implementation, Suppliers are invited to complete the concise form much as they are invited to complete other PIM system forms.

### [Conflict Minerals Questionnaire](#)

The Conflict Minerals Reporting Template is a free, standardized reporting template developed by the Conflict-Free Sourcing Initiative that facilitates the transfer of information through the supply chain, regarding mineral country of origin, as well as smelters and refiners being utilized. The questionnaire is used to determine Suppliers are using smelters recognized by and meeting the CFSI standards.

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

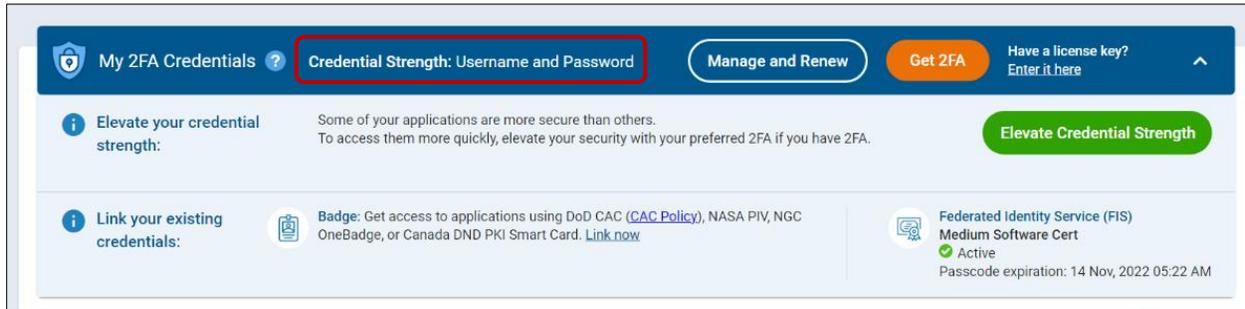
Exostar's Managed Access Gateway (MAG) is a consolidated portal that provides identity and access management as a cloud service for the Aerospace & Defense industries. The PIM application is available through MAG. To access PIM, you are required to have a MAG user account and an approved security credential.

### [PIM Access](#)

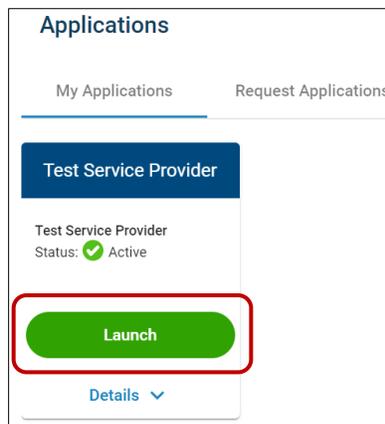
Once your organization is subscribed to MAG and PIM, and your organization or PIM Application Administrator accepts the Terms and Conditions, you can access PIM. To access the application:

1. Log into your [MAG](#) account with an approved multi-factor credential. Approved credentials include:
  - a. Phone-based OTP
  - b. OTP Hardware Token with Proofing Upgrade
  - c. Federated Identity Service (FIS) Medium Level of Assurance (MLOA) Hardware Certificates
  - d. Third-Party Credentials (Government-Issued Common Access Card (CAC), Northrop Grumman OneBadge, NASA PIV Card)
  - e. Enterprise Access Gateway (EAG) solution
  
2. Once you log into your MAG account with your multi-factor credential, verify the credential strength in the **My 2FA Credential** section on the MAG Dashboard.

**NOTE:** If the credential strength says **Username and Password**, you are not logged in with a multi-factor credential.



3. On your **Home Dashboard**, locate the PIM application under the **My Applications** section. Click **Launch**.

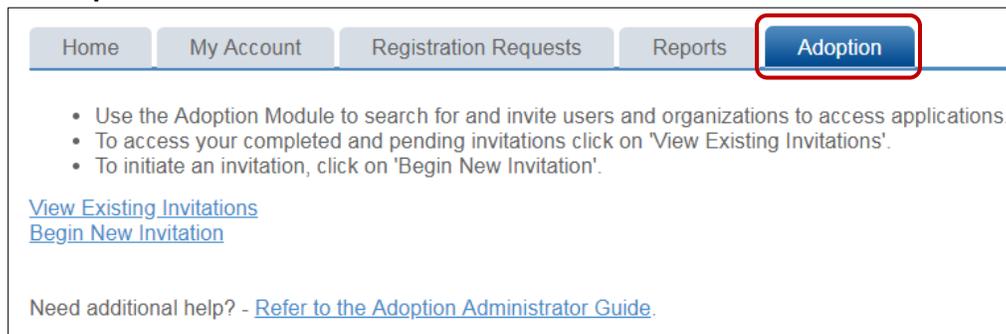


**NOTE:** If you see a status other than **Launch**, please use the **Legend** or reference the PIM FAQs for assistance. If you see a message saying **Login Requirements Not Met**, you did not login with the correct credential strength.

### Invite Suppliers to Complete Forms

To invite a Supplier to access and complete questionnaires in PIM:

1. Log into [Exostar's Managed Access Gateway](#), as an **Adoption Administrator** and access the **Adoption** tab.



2. For step-by-step instructions on completing the invitation process, please refer to the Adoption Administrator Guide.
3. When using the Adoption Module to subscribe a company to PIM, select the questionnaires (forms) you would like to invite them to.

Application Name	Detail
<b>Applications:</b> <input checked="" type="checkbox"/> Partner Information Manager	<b>Forms:</b> <input type="checkbox"/> Form Name <input type="checkbox"/> Cyber Security <input type="checkbox"/> NIST SP 800-171 <input type="checkbox"/> Conflict Minerals Reporting

### [PIM Roles](#)

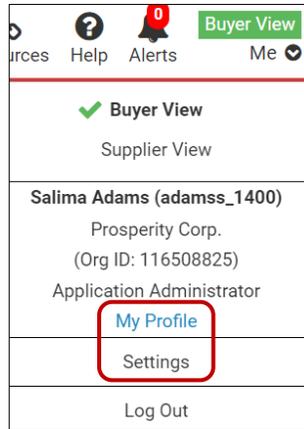
If you are a MAG PIM Application Administrator, the system also designates you as an Application Administrator in the PIM application.

The Application Administrator role within PIM allows you to manage users in the application. The Application Administrator can change a user’s role within PIM, deactivate a user’s PIM access, as well as create and edit groups. You can find additional information about completing these functions in the [Manage Users](#) and [Groups Tab](#) sections of this guide.

## Account Settings

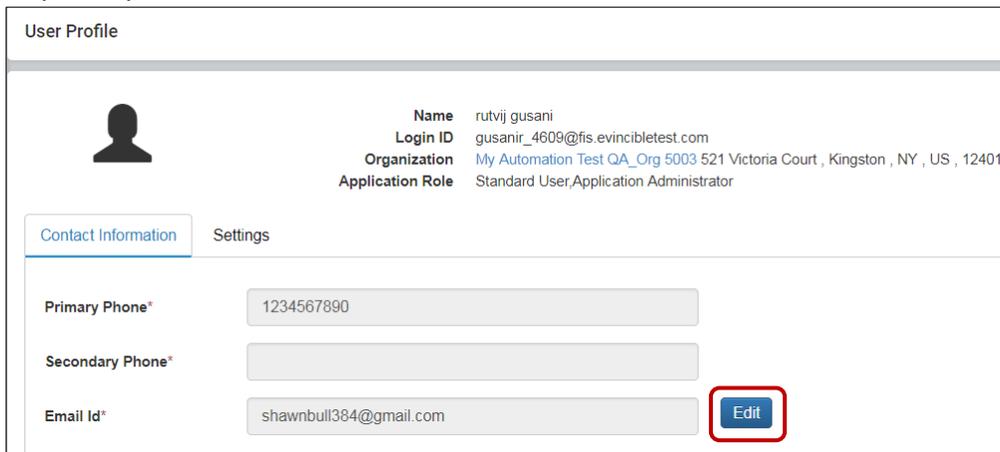
To access your **User Profile**:

1. On your **Home** dashboard in the upper right corner, select the **Me** dropdown. Choose either **My Profile** or **Settings**.

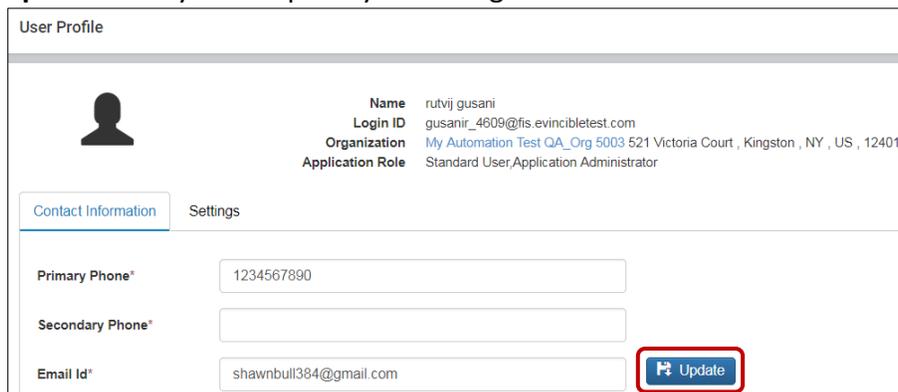


**NOTE:** Both options redirect to your **User Profile**, and you can navigate between the two tabs.

2. To update your **Contact Information**, click **Edit**.



3. Click **Update** once you complete your changes.



Under the **Settings** tab:

1. Modify necessary information:
  - a. Update the **Date/Time Format**.

**Date/Time Format**

---

Time Zone America/New\_York ▼

Date Format MM/dd/yyyy ▼      Time Format hh:mm tt ▼

- b. Change your **Default View** under the **Application** section or select **Default Groups**.

**NOTE:** Selecting **Default Groups** allows you to view information associated with only those Suppliers included in the selected default groups. This affects the Forms Activities and New Partners widgets on your dashboard.

**Application**

---

Default View Buyer ▼      Default Groups ---Select---

- c. Manage **Alerts** settings.
  - d. Manage **Email** settings.

2. Click **Save Changes** to redirect back to your dashboard page.

Choose which emails and alerts you wish to receive. The choices can be changed at any time but only effect future alerts and emails.

---

Alert	Email
Role updated <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	Capability Score below Level 3 <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>
Supplier Connected <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	Reminder of a form to be expired <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>
Form Sharing Request <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	Reminder to complete a form <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>
Form Sharing Accepted <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	Form sharing has been requested <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>
Form Delegated to you <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	When shared form has been updated by supplier <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>
Form Delegation removed <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	Accepted form has been completed/ submitted <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>
Shared Form was updated <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	Form Sharing request has been accepted by Supplier <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>
Form expiring within 30 Days <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	You have been assigned a form to complete <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>
Supplier declined your form sharing request <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	
Supplier opted out of sharing a form <span style="float: right;"><input checked="" type="checkbox"/> Yes</span>	

Save Changes

## PIM Home Dashboard

The Home dashboard contains widgets that enable you to access information and perform functions in the application, as well as clickable icons in the top header.

Please note the blue information icon located next to each widget name. This displays a dialogue box explaining the purpose of that particular widget. Select Partner Information Manager, regardless of where you are in the application, to redirect back to the dashboard.

**EXOSTAR** We build trust. **Partner Information Manager**

My Org Reports Supplier LookUp Resources Help Alerts **Buyer View** Me

Notice No Announcements Available. 10:08 AM 07/28/2020

### Forms Activities

Form	Supplier	Score 1	Score 2	Progress	Updated By	Date
No records available.						

No items to display

### New Partners

Supplier	Connection Request Date	Connection Accepted Date	Status
Paris Corp	02/01/2019		Accepted

1 - 1 of 1 items

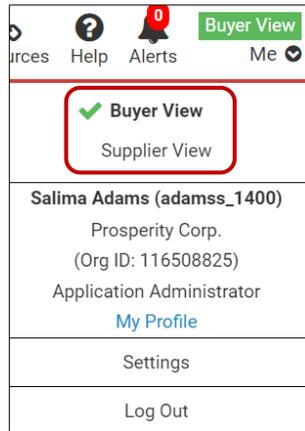
### Recent Activities (30 Days)

View All

## Buyer or Supplier Dashboard View

Both Buyer and Supplier organizations can use PIM. An organization can be both a Buyer from multiple Suppliers and a Supplier to multiple Buyers. To deal with these different business situations, the PIM product allows users to view their ecosystem from a Buyer or Supplier point of view.

The default view when you first access PIM is as a Buyer. If you are also subscribed as a Supplier, and want to view as a Supplier, select Supplier from the **Me** drop down in the top header. Your view automatically refreshes.

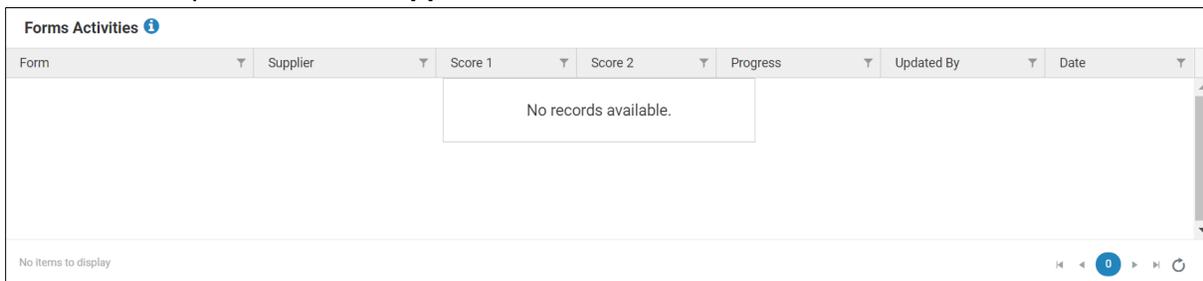


### Forms Activities Widget

The Forms Activities widget provides a quick view of forms shared by your Suppliers. Filter results by using the filter icons available in the columns, including a Group filter option that affects only this widget. If no one accepted the form, it displays as **Pending**. Until the Supplier submits the form, you cannot see the progress column or review the form. This widget also displays a Supplier's score, if the Supplier submitted the form.

To navigate this widget:

1. Click the hyperlinked form name to redirect to the Supplier's completed questionnaire.
2. Select a partner in the **Supplier** column to redirect to the **Partner's Profile**.



### New Partners Widget

The New Partners widget provides a list of all your connected partners, as well as the connection status of each supplier. Click the hyperlinked **Organization Name** to redirect to that Supplier Partner's profile.

Supplier	Connection Request Date	Connection Accepted Date	Status
<a href="#">Paris Corp</a>	02/01/2019		Accepted

### Recent Activities Widget

The **Recent Activities** widget on your home dashboard provides a 30-day timeline of all activities with a Supplier Partner.

Recent Activities ( 30 Days )			<a href="#">View All</a>
<a href="#">QA_Automation_Test_34</a>	Form Conflict Minerals Reporting has been accepted	09/29/2017 11:55 AM	
<a href="#">QA_Automation_Test_34</a>	Form NIST SP 800-171 R1 has been accepted	09/29/2017 11:54 AM	
<a href="#">QA_Automation_Test_34</a>	Form CYBERSECURITY QUESTIONNAIRE has been accepted	09/29/2017 11:53 AM	
<a href="#">QA_Automation_Test_34</a>	Connection Accepted	09/29/2017 11:53 AM	
<a href="#">QA_Automation_Test_31</a>	Form Conflict Minerals Reporting has been accepted	09/29/2017 11:51 AM	

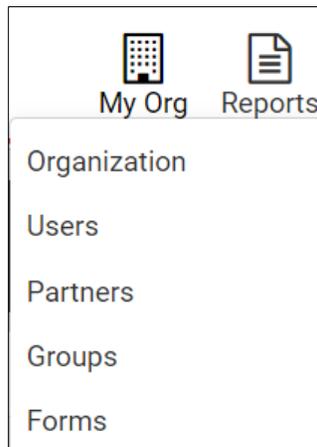
**NOTE:** Click the hyperlinked **Organization Name** to redirect to that Supplier's profile.

### My Org

This option, located in the top header menu, provides the following options, and redirects to those specific tabs on the **Organization Profile** page:

- **Organization:** This tab, also labeled as **Profile**, provides your organization's general overview information, as well as access to the **Supplier** or **Organization Profile**.
- **Users:** This tab provides a comprehensive list of all users within your organization with PIM access. If you are an Application Administrator, this tab also provides user-management options.
- **Partners:** This tab provides a comprehensive list of all connected Partners (Buyers). Select the **Partner Name** to view additional details.
- **Groups:** This tab provides all group management options, as well as a comprehensive list of all groups you created or Public Groups created by Application Administrators.

- **Forms:** This tab provides a comprehensive list of all forms Buyers requested you complete, as well as that form's status. If your organization shared the form, you can select the form name to redirect to the **Form Details** page.



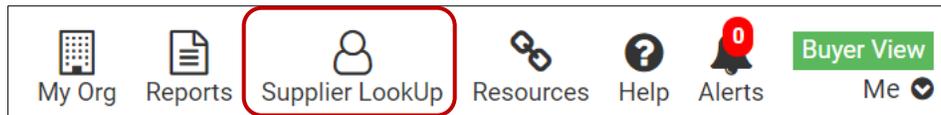
## Reports

This icon navigates directly to the Reports homepage, listing all reports to which you have access.



## Supplier LookUp

This icon opens the Supplier LookUp screen, which allows you to search Suppliers to whom you are connected. You also have the option to export your search results to Excel.



## Resources

This icon opens the PIM Form Resources page, which provides resources per PIM form, including blank forms, completion instructions and resources, as well as scoring information.



## Help

This icon provides the following drop-down options: **PIM Online** Help and **PIM FAQs**. Both options open their respective my.exostar.com pages, providing additional information on process instructions and frequently asked questions.



## Alerts

The Alert icon represents the number of alerts for your review. Click the icon to view a dropdown of alerts. You can **View All** or **Dismiss All**.

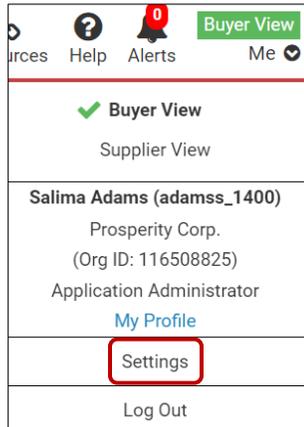


Select **View All** to redirect to the **Alerts** page, containing alerts for the last 30 days. You can **Dismiss All** or **Dismiss** one alert at a time. There is also a legend explaining the different alert types.

Level	Type	Description	Organization Name	Received
⚠	Form accepted	<a href="#">QA_Automation_Test_48 has accepted to share their Conflict Minerals Reporting form with you</a>	QA_Automation_Test_48	10/10/2017 08:46 AM
⚠	Form accepted	<a href="#">QA_Automation_Test_48 has accepted to share their NIST SP 800-171 R1 form with you</a>	QA_Automation_Test_48	10/10/2017 08:46 AM
⚠	Form accepted	<a href="#">QA_Automation_Test_48 has accepted to share their CYBERSECURITY QUESTIONNAIRE form with you</a>	QA_Automation_Test_48	10/10/2017 08:46 AM
ℹ	Connection established	<a href="#">You are now connected with QA_Automation_Test_48</a>	QA_Automation_Test_48	10/10/2017 08:46 AM
⚠	Form accepted	<a href="#">QA_Automation_Test_47 has accepted to share their Conflict Minerals Reporting form with you</a>	QA_Automation_Test_47	10/10/2017 08:39 AM

To manage alert settings:

1. In the top header, select **Settings** via the **Me** drop down.



2. Navigate to the **Settings** tab, and **Alerts** section. Modify the alert selections as desired, by choosing **Yes** or **No**. Click **Save Changes**.

Choose which emails and alerts you wish to receive. The choices can be changed at any time but only effect future alerts and emails.

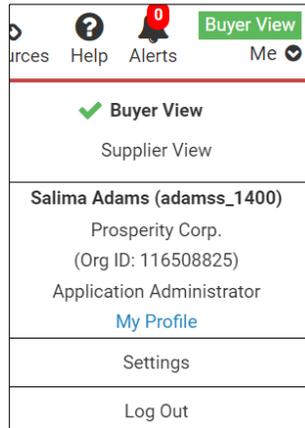
Alert	Email
Role updated <input type="checkbox"/>	Capability Score below Level 3 <input type="checkbox"/>
Supplier Connected <input type="checkbox"/>	Reminder of a form to be expired <input type="checkbox"/>
Form Sharing Request <input type="checkbox"/>	Reminder to complete a form <input type="checkbox"/>
Form Sharing Accepted <input type="checkbox"/>	Form sharing has been requested <input type="checkbox"/>
Form Delegated to you <input type="checkbox"/>	When shared form has been updated by supplier <input type="checkbox"/>
Form Delegation removed <input type="checkbox"/>	Accepted form has been completed/ submitted <input type="checkbox"/>
Shared Form was updated <input type="checkbox"/>	Form Sharing request has been accepted by Supplier <input type="checkbox"/>
Form expiring within 30 Days <input type="checkbox"/>	You have been assigned a form to complete <input type="checkbox"/>
Supplier declined your form sharing request <input type="checkbox"/>	
Supplier opted out of sharing a form <input type="checkbox"/>	

### Me Drop Down

This drop-down menu provides an overview of account options, and is broken up into the following sections:

- **Buyer View or Supplier View:** Select to toggle between the Supplier and Buyer views, if you have both business needs.

- **Account Information:** This section provides your organization name and ID, as well as your role. Select **My Profile** to update your account information.
- **Settings:** Select this option to update Date/Time Format, Application View (Supplier or Buyer), as well as Alert and Email settings.
- **Logout:** Select this to log out of the PIM Application.



### [Organization Profile Page](#)

The Organization Profile page provides the following tabs for you to manage your connections, users, groups, and to view forms shared with your company:

- Organization
- Users
- Partners
- Groups
- Forms

## Profile Tab

This tab provides information specific to your organization, as well as access to your Organization Profile.

**Prosperity Corp.**

Profile Users Partners Groups Forms

### General Organization Information

**ORG ID:** 116508825  
**Connection Type:** Public  
**Status:** Active since 11/30/2018  
**POC:** [Adams, Salima](#) 6785679876 [salima.adams@exostar.com](mailto:salima.adams@exostar.com)  
**Address:** 154 Red Road, Bethesda, MD 67568, US

Tell us more about your organization via editing your extended [Organization Profile](#)\*.

\*The information you provide will not be shared with organizations outside of Exostar's community. Complete as much information as you wish, but the more information you provide, the better picture your partners and community members will have of your organization.

### Foreign Ownership, Influence and Control (FOCI) Status

My organization **DOES NOT HAVE** foreign ownership, control of influence (FOCI).  
 My organization **DOES HAVE** foreign ownership, control of influence (FOCI).

## Users Tab

If you are designated as an Application Administrator within the PIM, you can manage users within the application. The Application Administrator can change a user's role and deactivate a user's access.

To edit a user:

1. Click **Users** via the **Me** drop down to redirect to the **Users** tab.
2. Click the **Tools** icon next to the user you want to manage. This icon only displays if you are an Application Administrator.

**Prosperity Corp.**

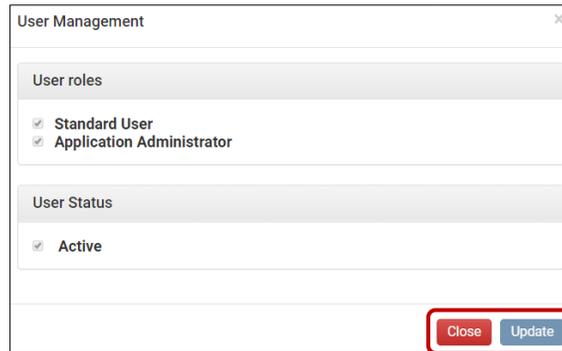
Profile Users Partners Groups Forms

Name	User ID	Email	Role	Provisioned	Last Updated	
<a href="#">Salima Adams</a>	adamss_1400@fis.evincibletest.com	<a href="mailto:salima.adams@exostar.com">salima.adams@exostar.com</a>	Standard User, Application Administrator	12/03/2018	04/30/2020	

1 - 1 of 1 items

**NOTE:** You can also select any of the user's hyperlinked information to open the individual user's profile.

3. From the **User Management** window, modify a user's role, including your own, if necessary.
4. Click **Update** to save your changes or **Close** to disregard.



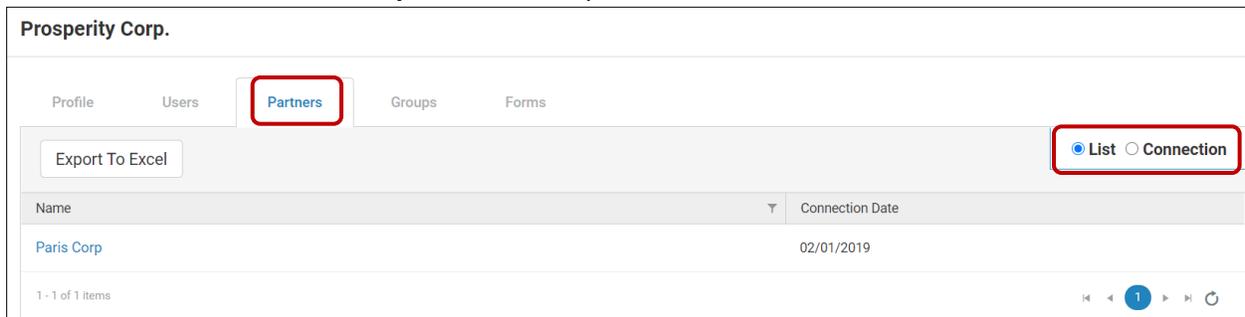
**NOTE:** If you change a user's role to **Standard User**, they lose administrative privileges within PIM. If you deselect the **Active** checkbox, the user no longer has access to PIM after they log into their MAG account.

## Partners Tab

The Partners tab provides a list of all Partners associated with your organization and the date you connected with them.

To navigate the Partners tab:

1. Select **Partners** from the **Me** drop down, and select from the following options:
  - a. Select **List** to view a list of all connected Partners and **Connection Dates**. Set filters by clicking the filter icon in each column.
  - b. Select the **Connection** radio button to view Supplier within a selected Group. Select the **Group** from the dropdown menu.



To view a Partner's Profile:

1. Click the hyperlinked **Name**.
2. You are redirected to the **Partner Profile** page. Select the dropdown arrow next to **Forms Shared By** to expand or collapse that section.

Globex Corporation

Organization Information

ORG ID : 888888888  
Connection Type : Public  
Status : Active since 10/13/2016  
POC : Paterson, Tim 800-555-1212  
Address : 7 W Jackson Blvd , USA, CA

Map

Forms shared by Globex Corporation (1)

FORM: [CYBERSECURITY QUESTIONNAIRE](#) OVERALL SCORE: 4.03 UPDATED: 02/06/2017

Forms shared with Globex Corporation (0)

3. Click the name of any form the Supplier completed and submitted, to re-route to the **Form Details** page.

### Groups Tab

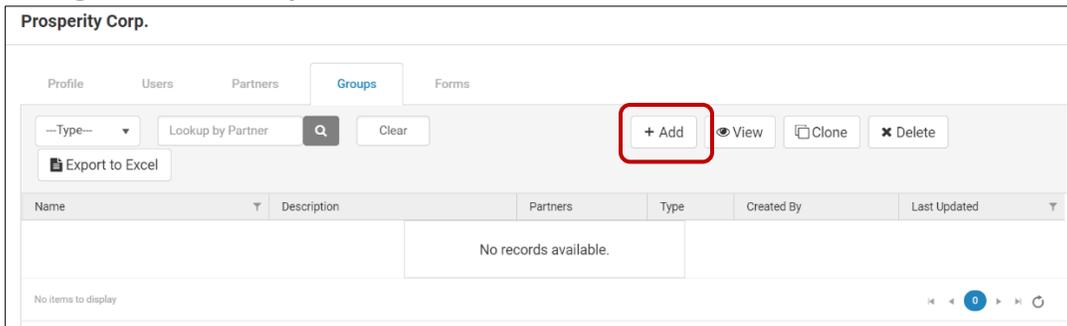
Groups are a collection of Supplier companies invited to complete a form. Groups help simplify viewing Supplier information.

For example, if you are purchasing parts to build an airplane wing and have 35 Supplier Partners providing airplane wing parts, you can include these Suppliers in a single group. You can also create reports using a specific Group. Please reference the [Reports](#) section in this guide for more information.

Select **Groups** from the **Me** drop down menu in the top header to complete the following processes:

## Add Group

1. Navigate to the **Groups** tab. Click **Add**.



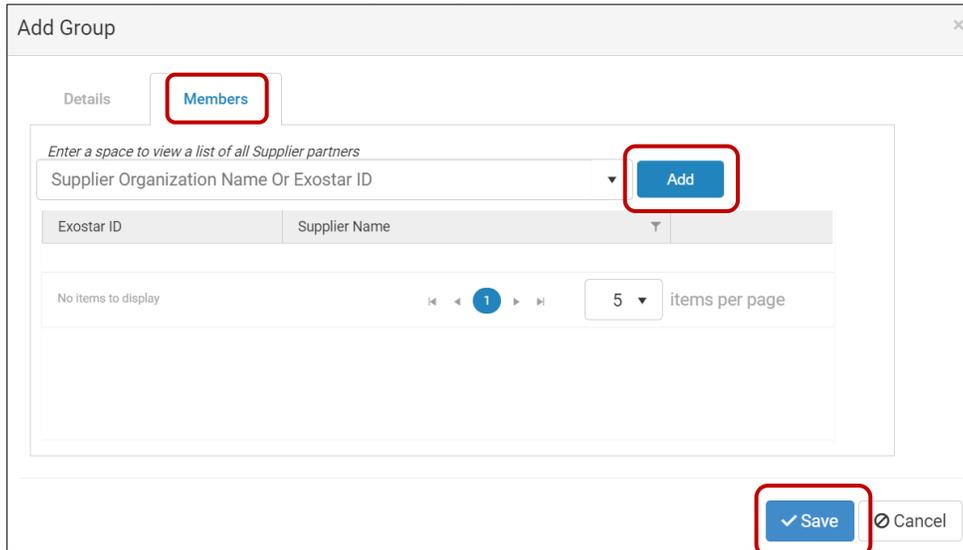
2. From the **Add Group** dialog box, enter a **Group Name** and **Description** (optional) on the **Details** tab.

**NOTES:**

- If you are an Application Administrator, select to make the group **Public** or **Private**. If you are a Standard User, you can only select Private.
- **Public Groups:**
  - Only an Application Administrator can create this group.
  - Viewable to all users in the organization, regardless of user role.
  - Managed by any Application Administrator in the organization.
  - All PIM Users in the organization can clone, regardless of user role.
- **Private Groups:**
  - All PIM users, regardless of user role, can create this group.
  - Viewable by the user who created the group and all Application Administrators in the organization.
  - Cloned by the user who created the group and/or all Application Administrators in the organization.
  - Only the user who created the group can manage.

3. To add the desired Supplier Organizations via the **Members** tab, use the **Search** box.  
**NOTE:** As you begin to type, the system displays matching results or enter the space bar to view a list of all Suppliers with which your organization is doing business.

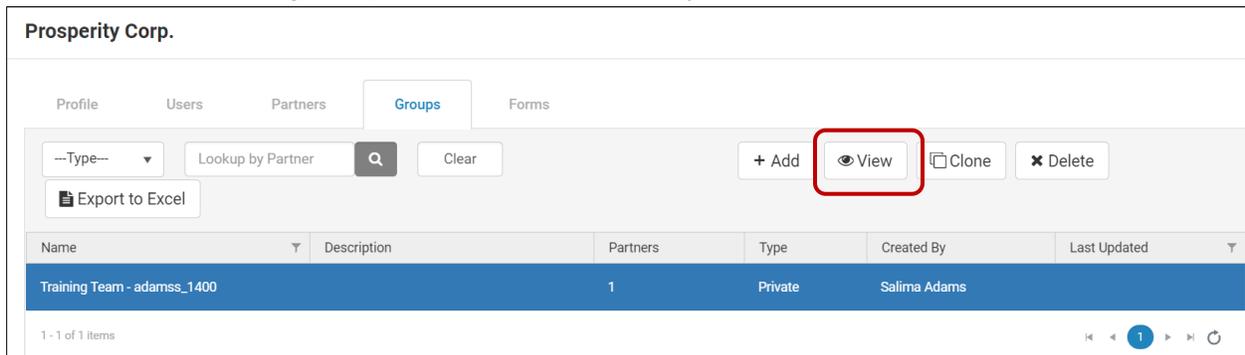
- 4. Select the checkbox next to each desired Supplier or click the **Select All** button to select all displayed suppliers. Click the **Add** button.
- 5. Once you complete customizing your group, click **Save**.



### View Group

To view a specific group:

- 1. From the **Groups** tab, select the desired Group and click the **View** button.



- 2. The **View Group** dialogue box displays the **Details** tab, including the name and description. Click the **Members** tab to view Suppliers included in this Group.

**NOTE:** If you have permission to manage the Group, the **Edit** button is active.

3. Once you are done viewing the Group, click **Cancel**.

### Export All Groups

To export a list of all Groups available to you:

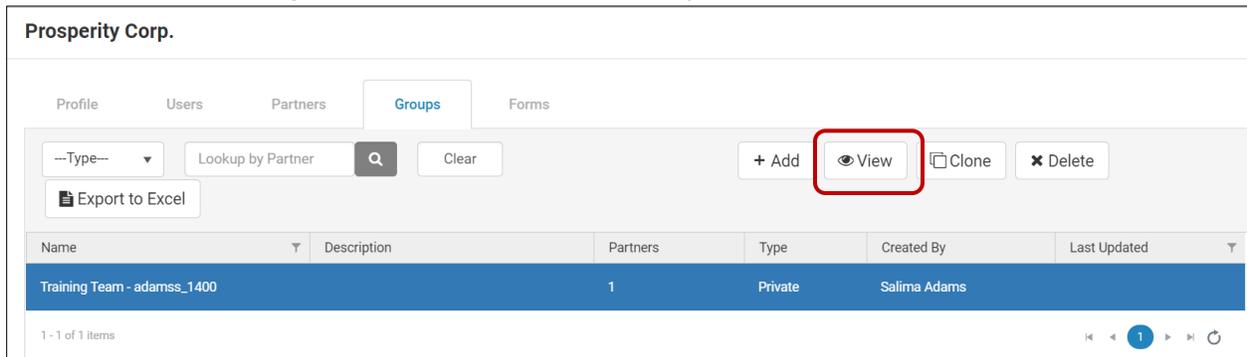
1. On the Groups tab, click the **Export to Excel** button.

2. The system downloads the list of groups displayed to an Excel file. Choose to **Open** or **Save**.

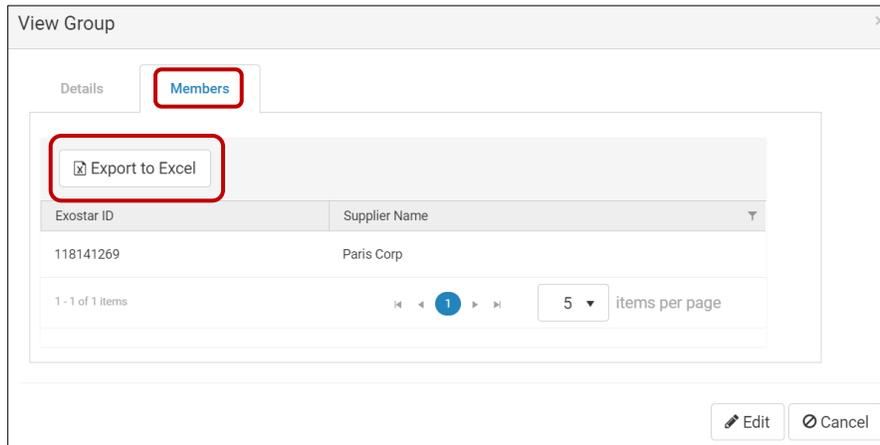
## Export List of Suppliers from Specific Group

To export a list of Suppliers from a specific group:

1. From the **Groups** tab, select the desired Group and click the **View** button.



2. The **View Group** dialogue box displays. Navigate to the **Members** tab and click the **Export to Excel** button.

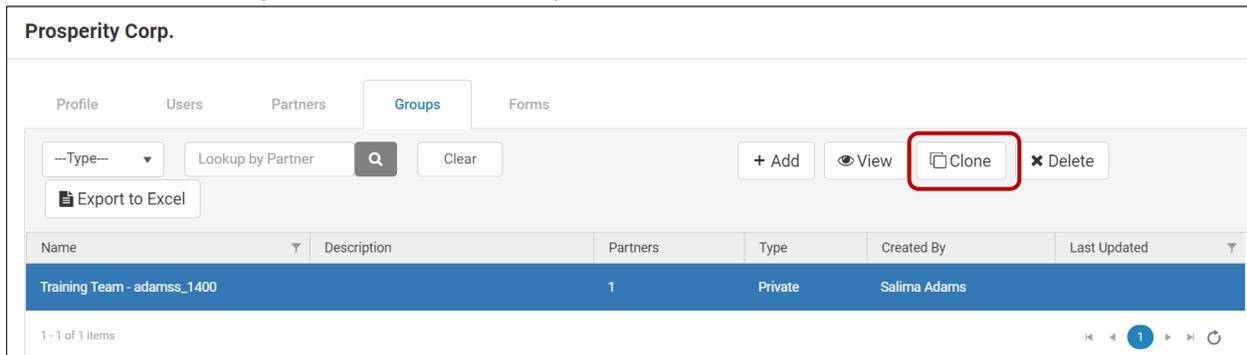


3. The system downloads the list of all organizations in that specific group to an Excel file. Choose to **Open** or **Save**.

## Clone Group

To clone or copy a specific Group and all the Suppliers in the Group:

1. On the **Groups** tab, select the Group and click the **Clone** button.



2. In the **Clone Group** dialogue box, on the **Details** tab, review or edit the following information:
  - a. Group Name
  - b. Group Description
  - c. Access Type (only Application Administrators can change this option)

Clone Group

Details Members

\* indicates required field.

Group Name \*

Description

Access Type  Private  Public

Save Cancel

3. Navigate to the **Members** tab to add or remove organizations from the Group clone.
 

**NOTE:** If you choose to remove an organization, a confirmation message displays. Click **OK**.
4. Once you complete all desired changes, click **Save**.

Clone Group

Details Members

Enter a space to view a list of all Supplier partners

Supplier Organization Name Or Exostar ID  Add

Exostar ID	Supplier Name	
118141269	Paris Corp	Remove

1 - 1 of 1 items  items per page

Save Cancel

## Forms Tab

A form is a questionnaire a Buyer invites a Supplier to complete. The available Questionnaires in PIM are:

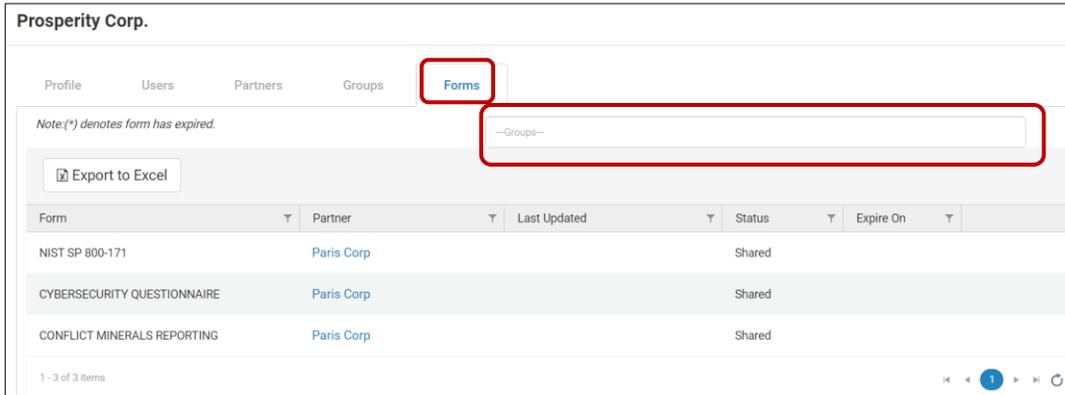
- Conflict Minerals
- Concise DFARS / DFARS 252 CS
- Cyber Supply Chain Risk Management Questionnaire (CSCRMQ)
- CyberSecurity Questionnaire (CSQ)
- NIST SP 800-171

Supplier forms allow you, as a Buyer, to view a list of shared forms, as well as forms you requested from a Supplier, regardless of status.

To access Forms:

1. Navigate to the **Forms** tab via the **My Org** drop down in the top header.

**NOTE:** Use the **Groups** drop-down menu to filter your view by specific groups.



### Form Details Page

The Form Details page displays how a Supplier Partner responded to a questionnaire and how they scored. If a Supplier has not shared, completed, or submitted the form, you cannot click the form.

To navigate the Form Details page:

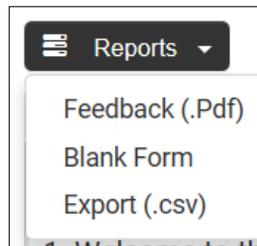
1. Click a hyperlinked form name from anywhere in the application.



- Click the percentage field or the **View** dropdown to view additional information, including how a Supplier answered a specific question for a specific section.

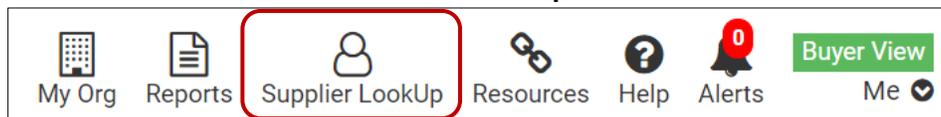
3.1. Access Control	100%	✓ View
3.2. Awareness and Training	100%	✓ View
3.3. Audit and Accountability	100%	✓ View
3.4. Configuration Management	100%	✓ View
3.5. Identification and Authentication	100%	✓ View
3.6. Incident Response	100%	✓ View
3.7. Maintenance	100%	✓ View
3.8. Media Protection	100%	✓ View
3.9. Personnel Security	100%	✓ View
3.10. Physical Protection	100%	✓ View

- The **Reports** dropdown provides the option to download a blank questionnaire or a **Feedback Report** on how a Partner responded.



## Supplier Lookup

The Supplier Lookup functionality, located in the top header menu, allows you to search for Suppliers. There are two search views: **Result** and **Map**.



## Result Search

To complete a search:

- Select to search by the **Org Name/Org ID, Form, or Group** from the dropdown menu.
- Enter search information. Click **Search**.

### NOTES:

- The system allows for partial organization name searches, but not special character searches.
- Use the filter icons located in each column to further refine your search.
- If the name displays in the list, you can still use the **Search** button.
- There may be a name or spelling problem if the required Supplier does not display after the search. You can try other searches (e.g., Group, Partner Type, etc.).

3. Select the **Organization Name/Exostar Id** option to view a **Partner's Profile**.

Lookup By

Org.Name / Org.Id

Result | Map

Exostar Id	Name	Status	Last Updated	
111608104	QA_Automation_Test_35	Accepted	10/03/2017	Summary
112873514	QA_Automation_Test_34	Accepted	09/29/2017	Summary
113335367	QA_Automation_Test_31	Accepted	09/29/2017	Summary
117900533	QA_EmailSettings_TestOrg...	Accepted	09/21/2017	Summary

1 - 20 of 169 items

1 2 3 4 5 6 7 8 9

4. Select **Export to Excel** to download a list of relevant results to an Excel file.

Lookup By

Org.Name / Org.Id

Result | Map

5. Select **Summary** to determine if a Supplier Partner accepted your sharing request.

Exostar Id	Name	Status	Last Updated	
111608104	QA_Automation_Test_35	Accepted	10/03/2017	<a href="#">Summary</a>
112873514	QA_Automation_Test_34	Accepted	09/29/2017	<a href="#">Summary</a>
113335367	QA_Automation_Test_31	Accepted	09/29/2017	<a href="#">Summary</a>
117900533	QA_EmailSettings_TestOrg...	Accepted	09/21/2017	<a href="#">Summary</a>

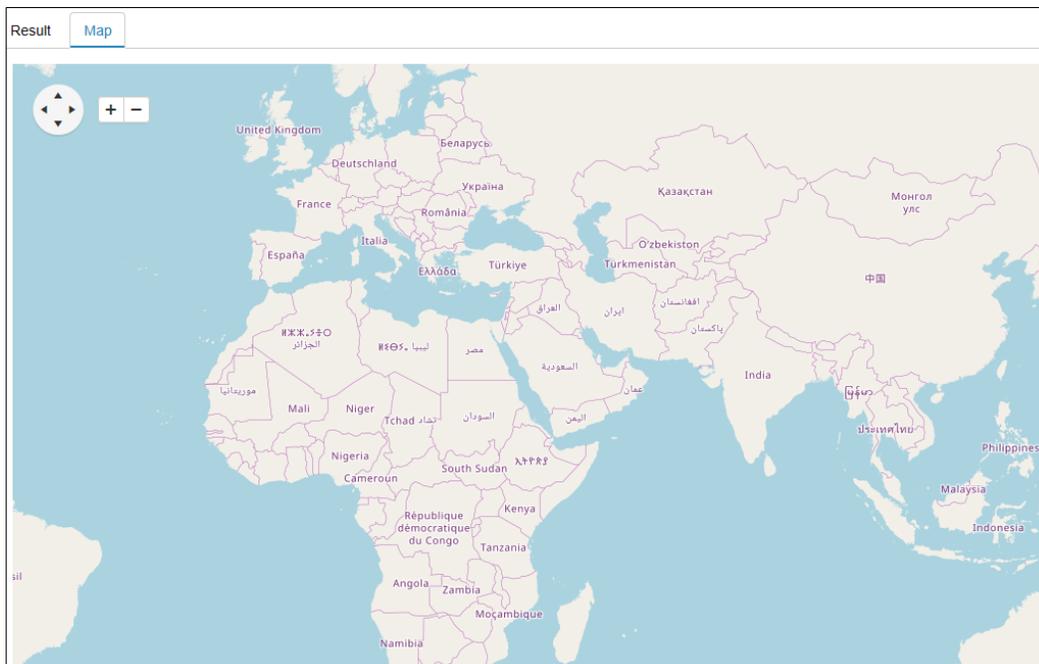
**NOTE:** The **Summary** view provides other details, such as a Supplier Partner’s form progress. If a Supplier completed the form, the progress displays as 100%. If the Supplier Partner submitted the form, click the hyperlinked name to view the completed form.

Partner Information				
<b>Supplier Name :</b> Globex Corporation <b>Connection Status :</b> Accepted <b>Connection Established Date :</b> 01/29/2017 <b>Last Updated :</b> 01/30/2017				
Supplier Forms				
Form	Status	Capability Score	Progress	Last Updated
<a href="#">CYBERSECURITY QUESTIONNAIRE</a>	Shared	4.03	100%	2/6/2017 6:40:48 PM

### Map Search

To complete a search using the Map function:

1. Select search criteria from the dropdown.
2. Enter search information. Click **Search**.



## NOTES:

- You can complete partial organization name searches; however, you cannot complete special character searches.
- You may need to zoom in before the marker appears. To zoom in, click the + sign or use the scroll wheel on your computer mouse.
- To learn more about the organization, hover over the map marker to view organization details.

## Reports

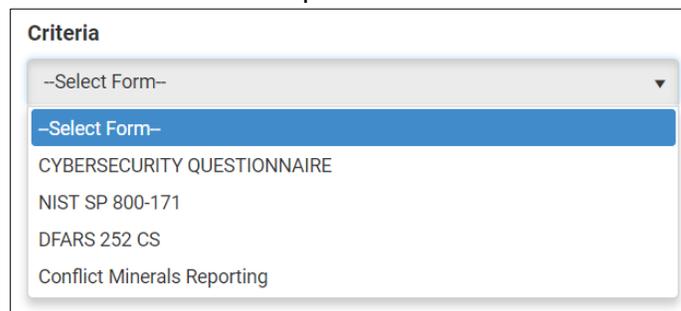
You can create, view, and download reports based off Supplier's questionnaire answers.

To create a report:

1. Click **Reports** option via the top header menu.



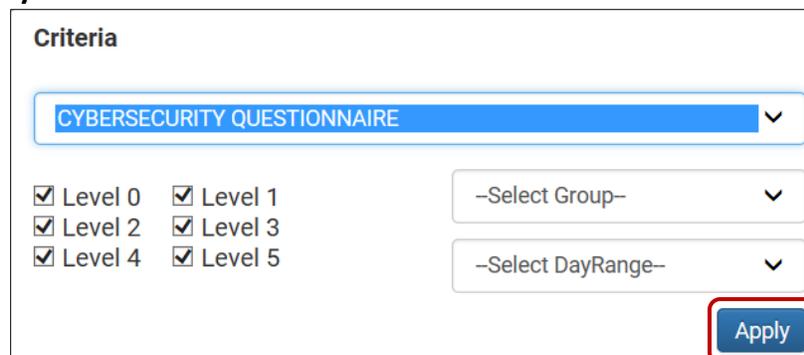
2. Select the desired form from the dropdown.



## Cybersecurity Questionnaire Report

For Cybersecurity Questionnaire reporting:

1. Select the report criteria: capability level, day range, or group.
2. Click **Apply**.

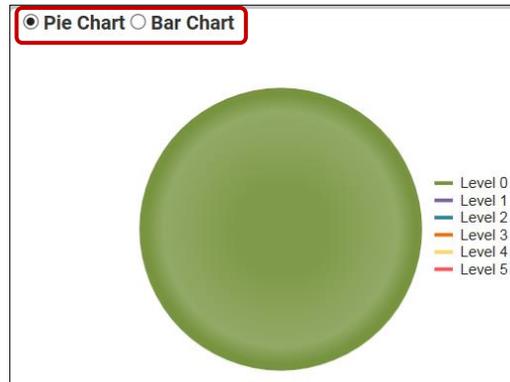


3. The results display in the bottom section. Select the hyperlinked **Form Name** or hyperlinked **Score** to redirect to the Partner's completed form. Select the **Exostar Id** or **Supplier Name** to redirect to the Partner's profile.

To manage the results view:

1. Select to view the visual chart in your preferred format: **Pie Chart** or **Bar Chart**.

**NOTE:** These charts summarize the results from multiple Partner questionnaires of the same type.



2. Hover your mouse over the chart to display the percentage of partners grouped within a level.

To modify reporting results:

1. Select the **Columns** button to redirect to the **Column List** page.
2. Make necessary selections. Click **Apply**.

Column List ×

- Sharing Status
- Date Assigned
- Last Updated
- Form Progress(%)
- Score 1 (Overall Score)
- Score 2 (Capability Score)
- Capability Level
- Submitter Name
- Group
- Connection Establish
- Form Accepted On
- Form Started On
- Form Submitted On
- Form Delegated
- Supplier Email
- Supplier Country
- Supplier State
- Submitter Email
- Expire On

3. To export the report, select **Export to Excel** or select to **Export Raw Score**.

## NIST SP 800-171 Questionnaire Report

For the NIST SP 800-171 Questionnaire reporting:

1. Select the report criteria: status, day range, or group.
2. Click **Apply**.

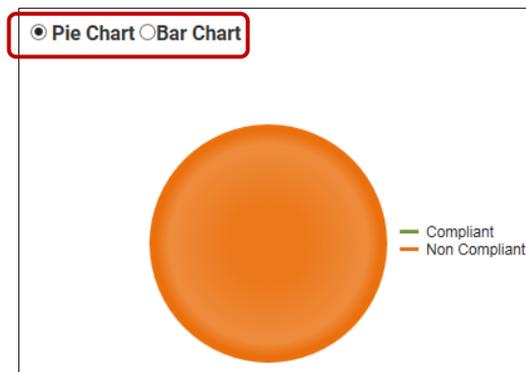
The 'Criteria' form contains a dropdown menu set to 'NIST SP 800-171 R1'. Below this are two columns of checkboxes for levels: Level 0, Level 1, Level 2, Level 3, Level 4, and Level 5, all of which are checked. To the right, there is a dropdown menu for 'Group' set to '--Select Group--' and another dropdown menu for 'Days' set to '30 Days'. A blue 'Apply' button is located at the bottom right of the form and is highlighted with a red box.

**NOTE:** The results display. Select the **Form Name** or **Score** to redirect to the Partner’s completed form. Select the **Exostar ID** or **Supplier Name** to redirect to the Partner’s profile.

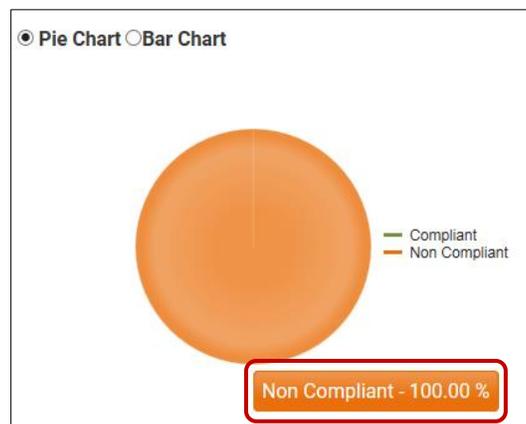
To manage the results view:

1. Select to view the visual chart in your preferred format: **Pie Chart** or **Bar Chart**.

**NOTE:** These charts summarize the results from multiple Partner questionnaires of the same type.



2. Hover your mouse over the chart to display the percentage of Partners grouped within a level.



To modify reporting results:

1. Select the **Columns** button to redirect to the **Column List** page.
2. Make necessary selections. Click **Apply**.

Column List ×

- Sharing Status
- Date Assigned
- Last Updated
- Form Progress(%)
- Score 1 (Implemented + Approved)
- Score 2 (Implemented + Approved + Addressed)
- Submitter Name
- Group
- Connection Establish
- Form Accepted On
- Form Started On
- Form Submitted On
- Form Delegated
- Supplier Email
- Supplier Country
- Supplier State
- Submitter Email
- Expire On

3. To export the report, select **Export to Excel** or **Export Raw Score**.

## Conflict Minerals Report

For the Conflict Minerals Questionnaire reporting:

1. Select **Conflict Minerals** form type or answers to submission questions.
2. Click **Apply**.

**Criteria**

Conflict Minerals Reporting

**Q1. Is any 3TG intentionally added to your product(s) an...**  
More  
 Yes  No

**Q2. Are any of the Smelters listed that were not found on...**  
More  
 Yes  No

**Q3. Do any of the smelters in your supply chain source t...**  
More  
 Yes  No

**Apply**

**NOTE:** The results display. Select the **Form Name** or **Score** to redirect to the Partner’s completed form. Select the **Exostar ID** or **Supplier Name** to redirect to the Partner’s profile.

To modify the reporting results:

1. Select the **Columns** button to redirect to the **Column List** page.
2. Make necessary selections. Click **Apply**.

Column List

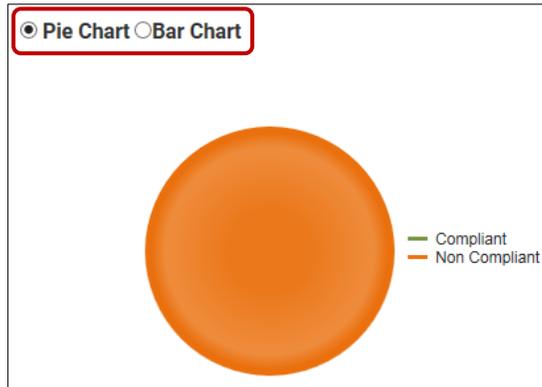
- Sharing Status
- Date Assigned
- Last Updated
- Form Progress(%)
- Score/CapabilityLevel
- Overall Score
- Connection Establish
- Group
- Form Accepted On
- Form Started On
- Form Submitted On
- Form Delegated
- Supplier Email
- Supplier Country

**Apply** **Close**

3. To export the report, select **Export to Excel**. To export raw scores, select **Export Raw Score**.

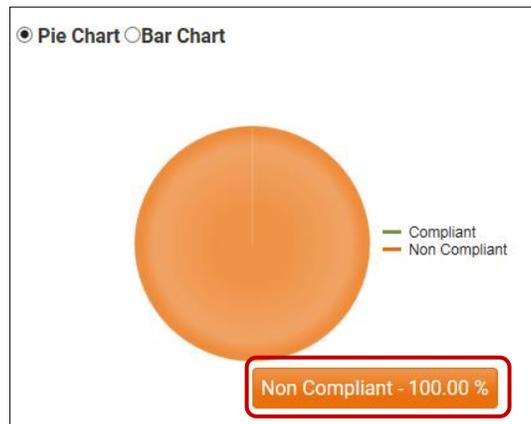
To manage the results view:

1. Select to view the visual chart in your preferred format: **Pie Chart** or **Bar Chart**.



**NOTE:** These charts summarize the results from multiple Partner questionnaires of the same type.

2. Hover your mouse over the chart to display the percentage of Partners grouped within a level.



## DFARS 252 CS Report

For the DFARS 252 CS reporting:

1. Select **DFARS 252 CS** form type and answer criteria questions.
2. Click **Apply**.

**Criteria**

DFARS 252 CS

Q1) Are your company's Information Technology systems...  
More  
 Yes  No

Q2) Has your organization implemented the security cont...  
More  
 Yes  No

Q2a) Has your organization documented how it impleme...  
More  
 Yes  No

Q2b) Are any unimplemented or deficient controls docum...  
More  
 Yes  No

Apply

**NOTE:** The results display. Select the **Form Name** or **Score** to redirect to the Partner's completed form. Select the **Exostar ID** or **Supplier Name** to redirect to the Partner's profile.

To modify the reporting results:

1. Select the **Columns** button to redirect to the **Column List** page.

Results :

Export to Excel Columns Export Raw Score

Form Name	Exostar Id	Supplier Name	Sharing Status	Date Assigned	Last Updated	Form Progress(%)	Score
DFARS 252 CS	115325373	Shiv_FH_SAIC021	Shared	11/27/2018	11/27/2018	100	NN-
DFARS 252 CS	114057544	MDAOrg03/Missile	Shared	11/22/2018	11/28/2018	100	NN-
DFARS 252 CS	115648052	MDAorg04/test	Shared	11/21/2018	11/28/2018	100	NN-
DFARS 252 CS	119476974	Shiv_FH_SAIC013	Shared	11/28/2018	11/29/2018	100	No CUI

1 - 8 of 8 items

2. Make necessary selections. Click **Apply** or **Close** to disregard.

Column List

- Sharing Status
- Date Assigned
- Last Updated
- Form Progress(%)
- Score 1
- Score 2
- Submitter Name
- Connection Establish
- Form Accepted On
- Form Started On
- Form Submitted On
- Form Delegated
- Supplier Email
- Supplier Country
- Supplier State
- Submitter Email
- Expire On

Apply Close

3. To export the report, select **Export to Excel**. To export raw scores, select **Export Raw Score**.

To manage the results view:

1. Select to view the visual chart in your preferred format: **Pie Chart** or **Bar Chart**.





**NOTE:** These charts summarize the results from multiple Partner questionnaires of the same type.

2. Hover your mouse over the chart to display the percentage of Partners grouped within a level.

### Scoring

**Cybersecurity Questionnaire:** The capability score is calculated based on the responses provided to each control family. A Supplier Partner is required to implement all control activities contained within a capability level to attain that capability level. Before a Supplier Partner can meet the next capability level, they are required to have implemented all control activities from the prior control family.

**NIST SP 800-171 Questionnaire:** Two score bars display under the **Score Summary** section. The first score provides the total **Implemented** and **Approved** controls over the total number of available controls. The second score bar indicates the total number of Controls the Supplier selected **Implemented**, **Approved**, and **SSP/ POAM** for, over the total number of available controls. Each bar remains red until it reaches a level of 100%.

**Conflict Minerals Questionnaire:** Compliancy for this form is determined from how a Supplier responded to the questionnaire. Compliance to the Conflict Minerals Questionnaire is based on CFSI standards. The exact compliance instructions are located on the [CFSI website](#).

**DFARS 252 CS Questionnaire:** Compliancy for this form is determined from how a Supplier responded to the questionnaire. Select the **Form Name** to redirect to the **Form Detail** page. The **Score Summary** displays on the right-hand side of the page as **Compliant**, **Sharing**, and **Flowdown**.