Exostar Secure Access Manager (SAM) User Guide

March 2024

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Document Versions

Version	Impacts	Date
SAM 4.0	• Changed the product name from IAM to MAG • Updated the text and screenshots for the new login and authentication flow (in the "Login to your Exostar SAM Platform Account" section) • Updated the SOTP Client Administrators section	July 2019
SAM 4.1	• Updated Activation Workflow • Create Password Workflow • Authentication Workflow • Updated Footer • Announcement Banner	March 2020
SAM 4.4	• Password & security questions enhancements • Improve account activation process • Login screen updates	May 2021
SAM 5.0	• SP Admin email enhancements • Authentication updates • Manage Credentials sub-tab • Activation email reminders	February 2022
SAM 5.2	• Link accounts under primary account • OTP registration page enhancements	August 2022
SAM 5.3	• New Application email templates • Improved registration and login process • New welcome & registration videos • Improved Application admin search features	October 2022
SAM 6.0	• Improve account consolidation to reduce duplicate accounts • Enhanced Reporting dashboard for Administrators • First Time Login translation in Japanese	July 2023
SAM 6.2	• New BETA Bulk Upload feature • New Admin Insights Dashboard • Improved SP Admin requests tasks • User profile feature updates	March 2024

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INTRODUCTION

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

Application Overview

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

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

Key Platform Features:

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

Types of Organizations and Users in SAM Platform

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

Organization-Managed Organization (OMO)

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

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

Sponsor-Managed Organization

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

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

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

Exostar-Managed Organization

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

An Exostar-Managed Organization has all the below features:

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

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

Types of SAM Users

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

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

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

Table B: User Roles in SAM

Role	OMO	SMO	EMO
User	X	X	
Organization Administrator (OA) (Scope: Limited to Their Organization)	X	X	
Management Portal Administrator (MPA) (Scope: Limited to Tenancy; a Tenancy could include multiple Organizations)	X	X	
Service Provider Administrator (SPA) (Scope: Limited to Their Applications)	X	X	X
Exostar Portal Administrator* (EPA) (Scope: Full Admin Capability)	X	X	X
EPAs are Exostar employees that have full admin control over users of all Org Types.			

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Basic Functions

Login to your SAM Account

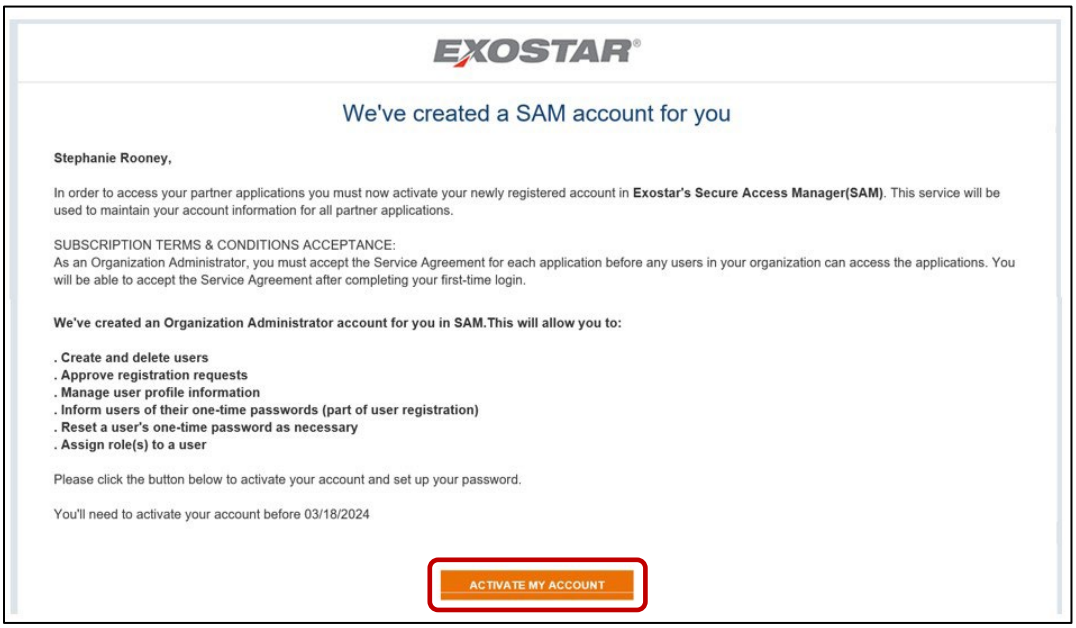
Whether logging into Exostar's SAM Platform for the first time, returning to the portal, or logging in via EAG, you can access the portal at: https://secureaccess.exostar.com.

How to Activate your Account

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

Follow the steps below to activate your account:

1. You will receive an email invitation to active your account, click the **Activation My Account** button:



NOTE: You must activate your account by the date in the email, if you do not the link will expire and Exostar will have to resend the activation email.

2. You will be redirected to the Welcome screen, from here click **Let's Get started** button.

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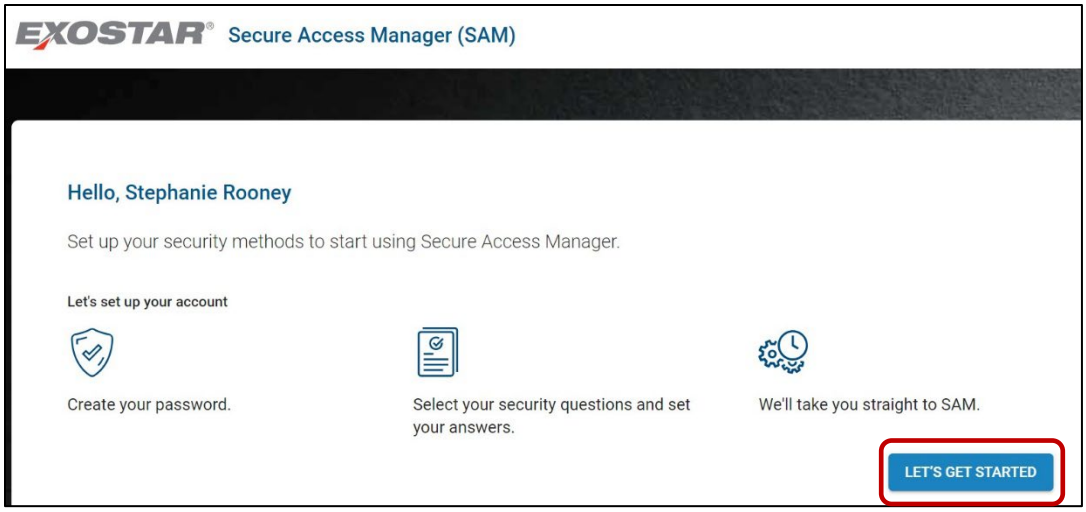
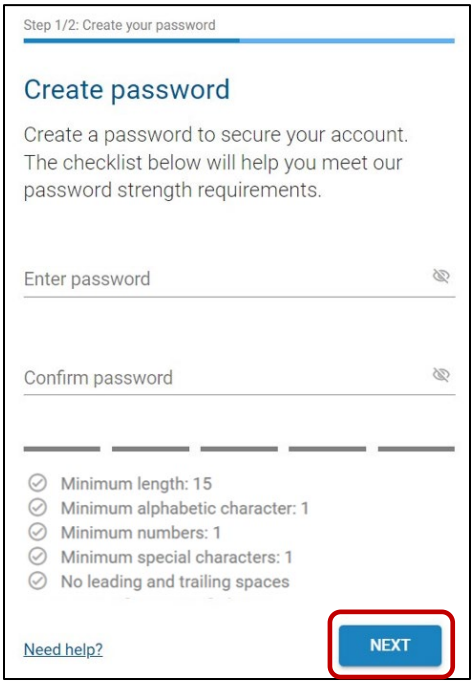


3. Create your password and re-enter the new password again in the fields provided. Please make sure you meet all the password requirements. Then click **Next**.



4. Next setup your security questions and answers. Then click **Next**.

NOTE: To view your answers, check the **Show all Answers** box.

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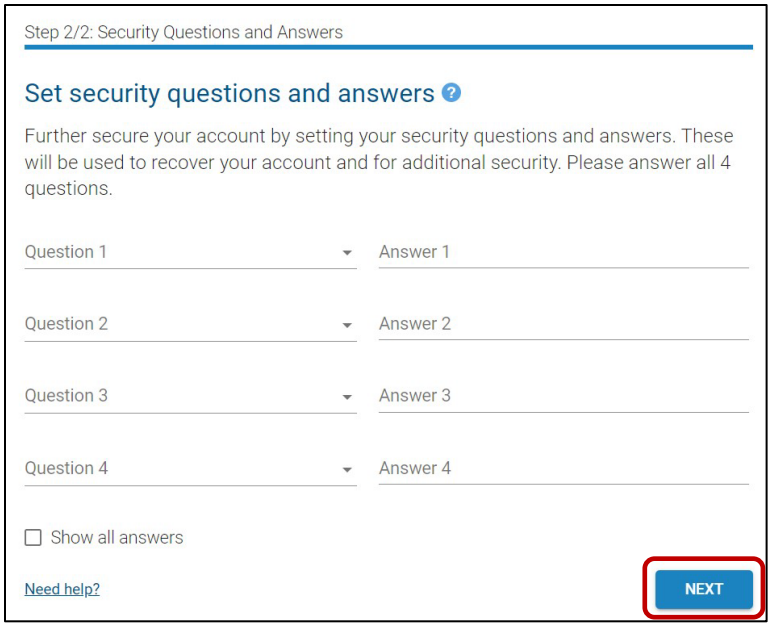
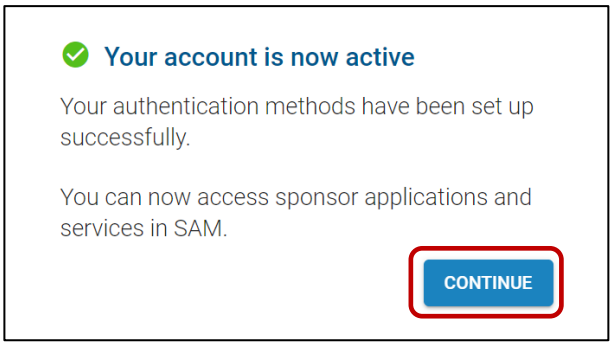


5. After you setup your password and security questions, your account is now **Active**. Click **Continue** to access the SAM portal.



How to Login to Exostar's SAM Portal

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

1. Go to the Exostar SAM Platform login portal: *https://secureaccess.exostar.com*.
2. Enter your **Email/User ID**. Then click **Next**.

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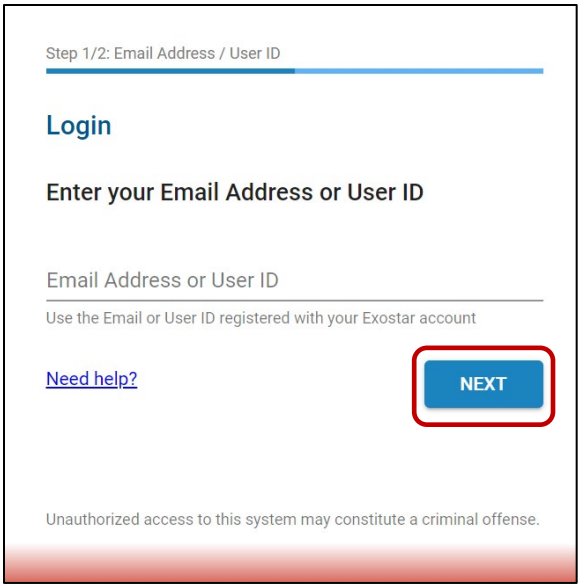
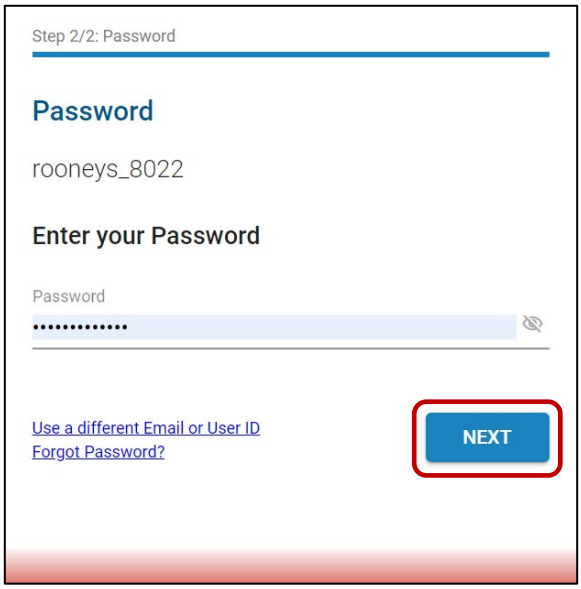


NOTE: SSO/EAG users have a cookie installed to their browser, which redirects them to their organization Remote Identity Provider (R-IDP). If you delete the cookie or use a different browser, entering the email address redirects you to the proper R-IDP.

3. Enter your **Password** and click **Next**.

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



4. Upon successful login, the Exostar SAM **Dashboard** displays. From your dashboard as a user you will see your **Applications**. As an Administrator, you will see **Administrator Insights** (which will be reviewed in the Administrator sections below).
5. In the **Applications** section you will see the applications your organization is subscribed to. The status will display below the application as either: active, suspended or pending approval.

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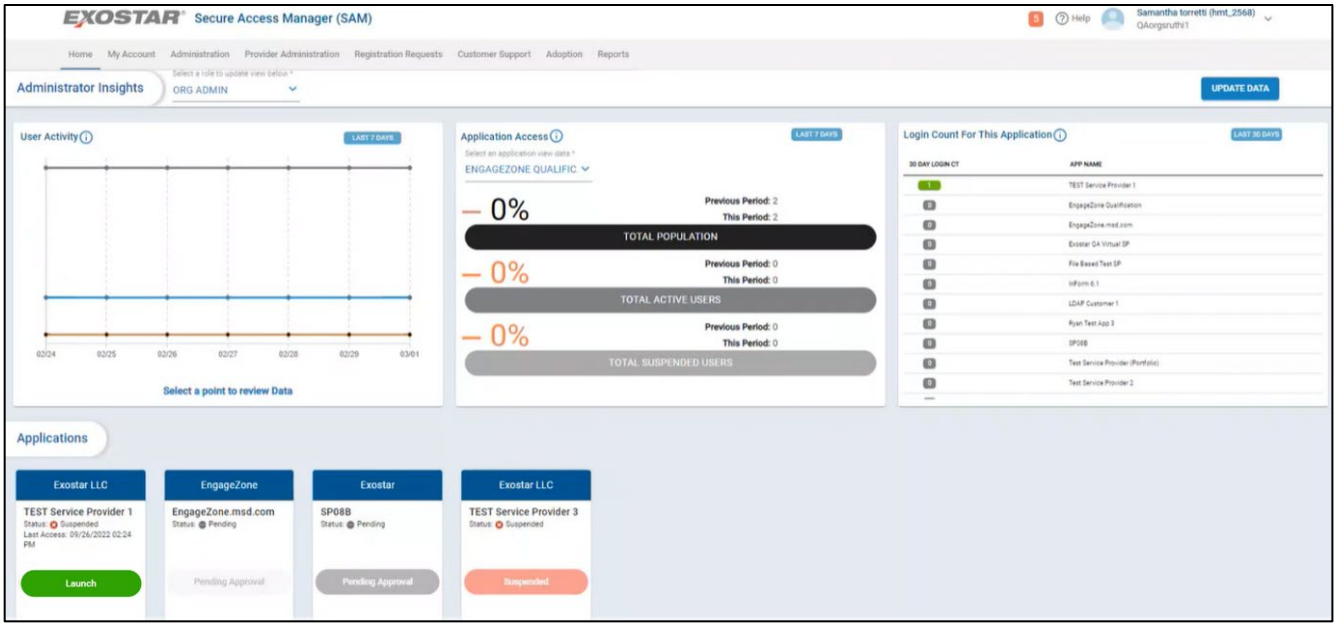
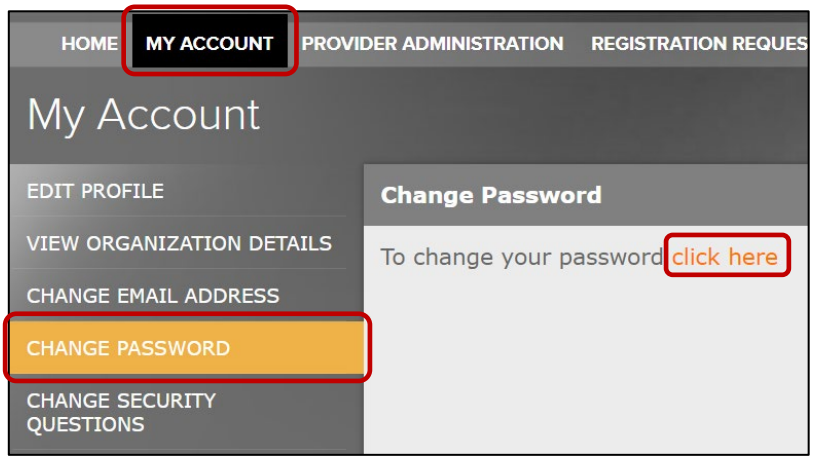


NOTE: If you have an Administrator role, the first time you login you will have to accept the *Terms and Conditions* before your organization and users can access the application(s).

How to Change your Password

Follow the steps below to change your password:

1. Log into your Exostar SAM Platform account by navigating to *https://secureaccess.exostar.com*. Enter your **Email/UserID** and click **Next.**
2. From your Dashboard, click **My Account** tab. Then select **Change Password** sub-tab.



3. Next select the "**click here**" link to change your password. You will be redirected to a new screen.
4. To change your password, enter the **Old Password** in the correct field.
5. Then enter your **New Password** and **Confirm** your new password in the correct fields. Make sure your new passwords match and meet the password requirements.
6. Click **Next** to save your new password. You will be redirected to your SAM Dashboard.

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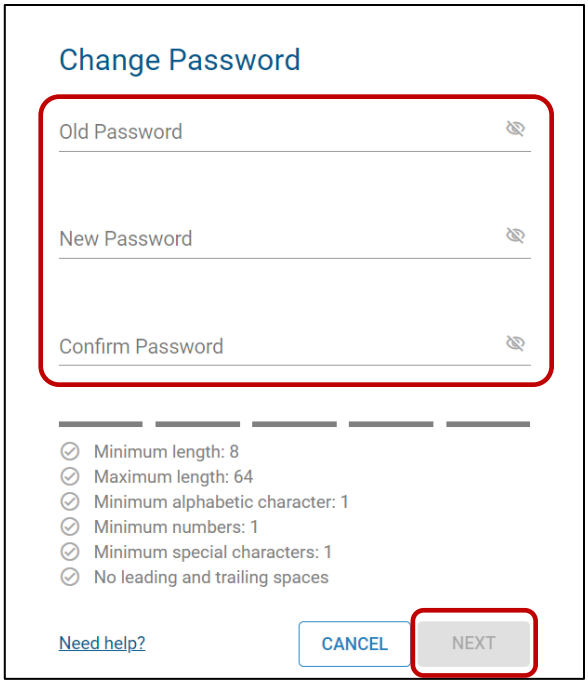


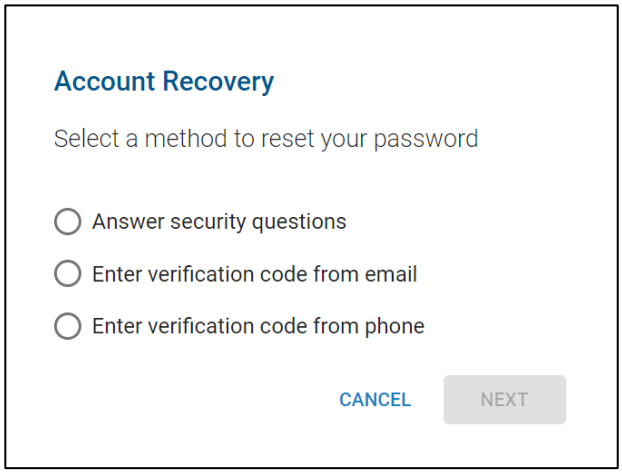
REMINDER: *Passwords must be a minimum 8 and maximum of 64 characters long. They must include at least 4 different characters, 1 alphabetic character, 1 number, and 1 special character. Leading and trailing spaces are not allowed. Passwords will expire after 90 days.*

Forgotten Password – Reset by Phone OTP

If you have an Active SAM Account and have forgotten your password, you can recover your password by choosing one of the Account Recovery methods.

1. Login your active SAM Account by entering your Email/UserID. Then click **Next**.
2. On the next screen, click "**Forgot Password?**" link.
3. You will be redirected to the **Account Recovery** methods page. Select one of the following methods:
    - Answer security questions.
    - Enter verification code from email.
    - Enter verification code from phone.

Follow the steps outlined below based on the password recovery method you selected.



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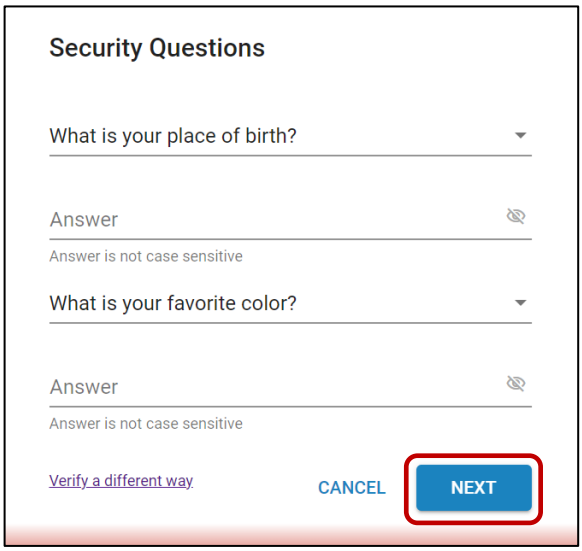
Recover Your Password – Security Questions

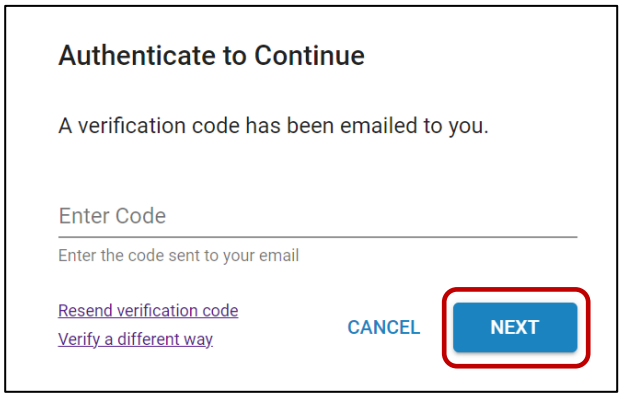
1. After you click "Forgot Password?" link, from the Account Recovery page select **Answer security questions**, then click **Next**.
2. Select the **Security Questions** you wish to answer from the drop-down list. Then enter your **Answer**.
3. Repeat the same steps to answer the second security question. Then click **Next**. ***NOTE:*** *You can click to view your Answers by selecting the eye icon.*



4. Follow the steps to reset your password.

Recover Your Password – Email Verification

1. After you click "Forgot Password?" link, from the Account Recovery page select **Enter Verification Code from Email**, then click **Next**.
2. You will receive an email with a verification code. *(NOTE: The email you registered to your SAM account is where the code is sent).*
3. Enter the **Verification Code**, then click **Next**.



4. Follow the steps to reset your password.

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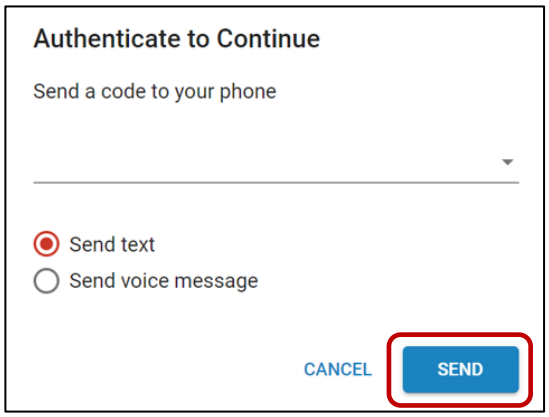
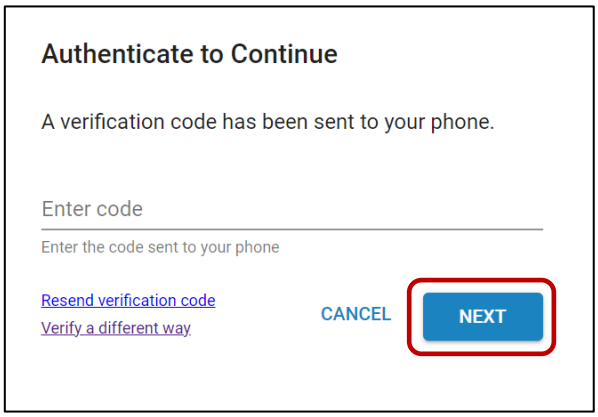
Recover Your Password – Phone Verification

1. After you click "Forgot Password?" link, from the Account Recovery page select **Enter Verification Code from Phone**, then click **Next**.
2. Select your phone number from the drop-down list. Choose **Send Text**, then click **Send**. *(NOTE: The phone you registered to your SAM account is where the code is sent. If you need to change this click "Verify a different way").*
3. Once you receive the verification code on your phone, **enter the code** then click **Next**.

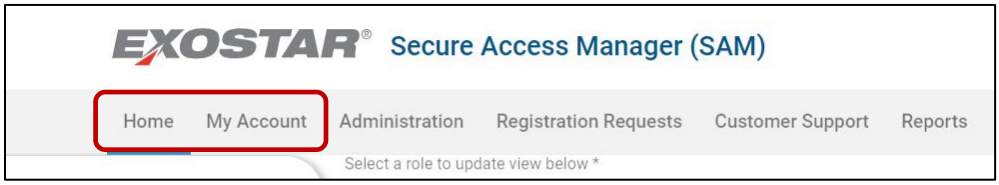




4. Follow the steps to reset your password.

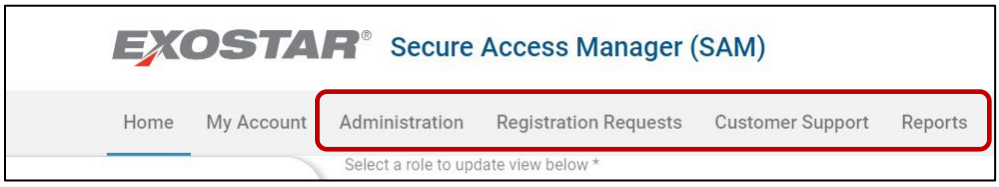
SAM Dashboard Home

When you log into Exostar's SAM portal the main Dashboard displays. It consists of two functional tabs: **Home** tab and **My Account** tab.



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

If you have an **Administrator role** you will see additional tabs display on your dashboard.



- **Administration:** is available to Organization Administrators and provides user management capabilities. New users will be created within this tab, and existing user profiles can be updated. In addition, the administrator may subscribe the organization to additional applications.

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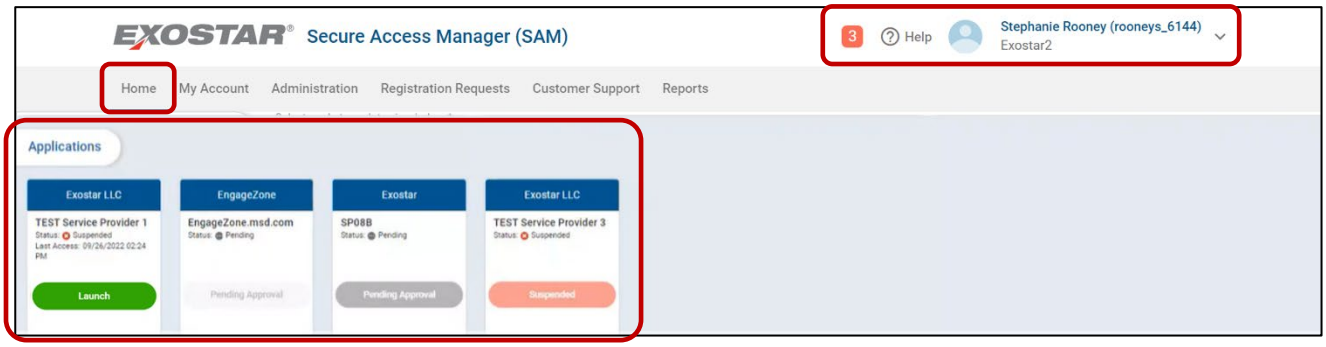
- **Registration Requests:** is available to Organization Administrators and is used to grant Exostar SAM Platform account approvals and application access to users who self- register. It is also used to approve users for OTP Token use.
- **Provider Administration:** is available to Service Provider Administrators and is used to manage Organization and User account subscriptions and access. The SP Admin role is not an org level administrator, but rather a system level administrator assigned by Exostar.

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

The Home Tab

From your SAM Dashboard, the **Home** tab is primarily used to access your active applications. In addition to providing application access, this screen will contain summary information about your organization, tasks, and account.



- **Applications:** Displays Applications your organization is subscribed and the status. Application statuses are below:
    - **Active:** Means you have access to this application and displays a green **Launch** button. (Click Launch to open the application).
    - **Request Access:** means you do not have access to the application. Click **Request Access** to send an approval request to your Administrator.
    - **Pending Approval:** means your Administrator must approve your request before you can access the application.
    - **Pending Terms:** means your Administrator must accept terms & conditions before users can access the application.
    - **Suspended:** means your access to the application expired. You must contact your Administrator to request access to the application.
- **User Profile Menu:** Displays your **Name.** Click the drop-down to view your role, organization ID, edit your profile, manage 2FA credentials, view organization, and logout.
- **Help menu**: Redirects you to MyExostar's self-help site with SAM users guides, videos, and how-to instructions.
- **Tasks (number)**: Displays notifications for tasks to be completed (mainly used for Administrators).

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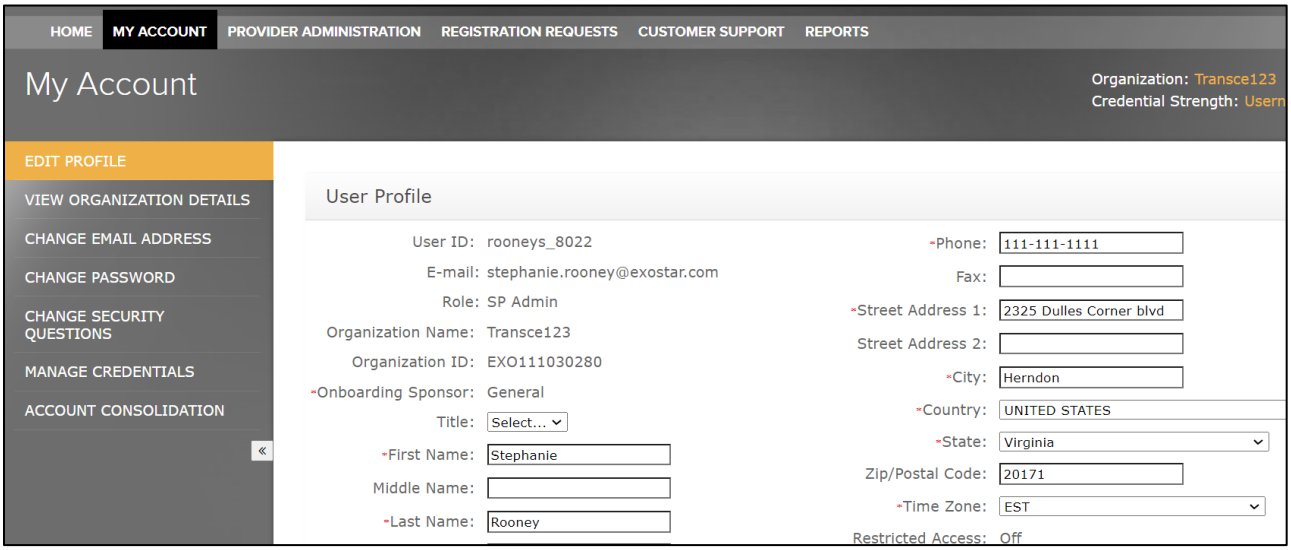
The My Account Tab

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



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

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

Account Management by User

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

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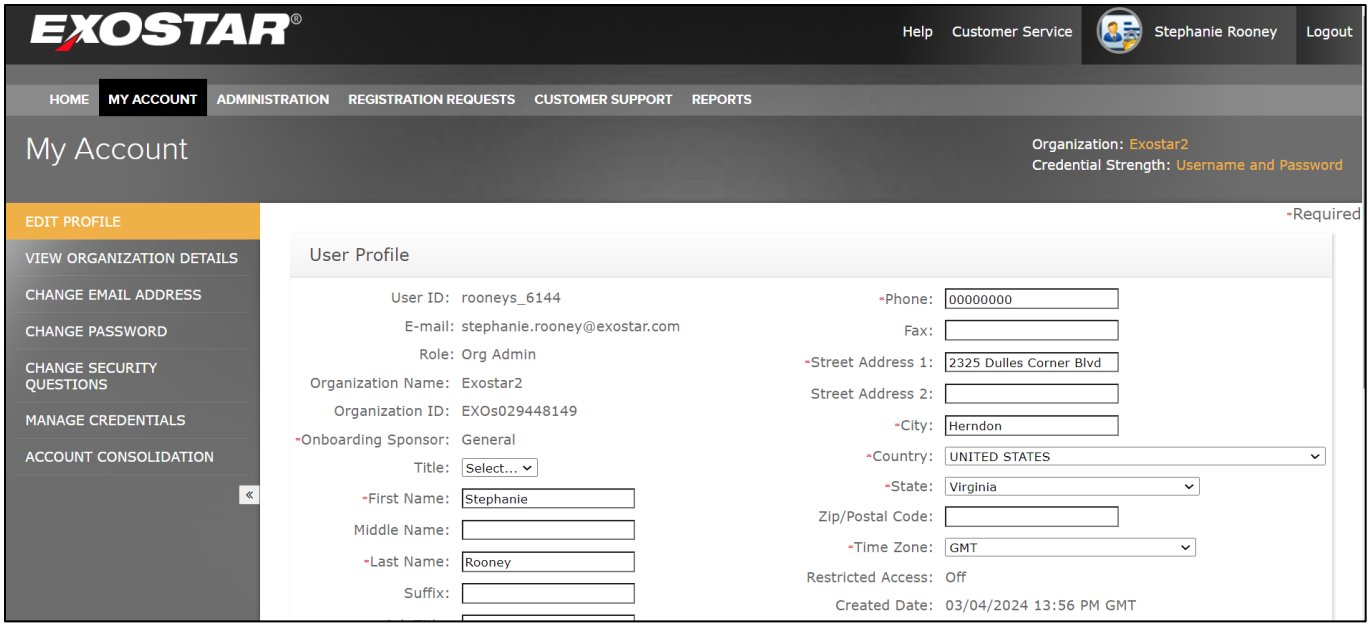


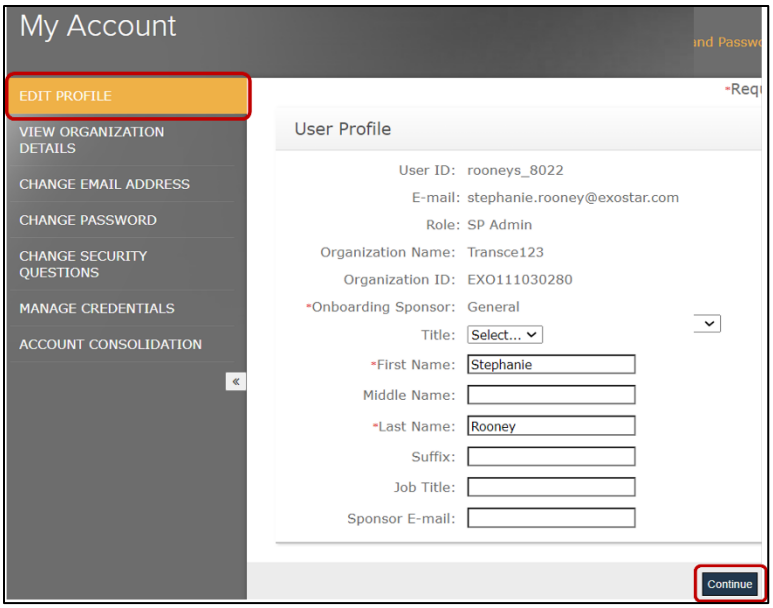
Edit Profile

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

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

To Edit your Account Profile:

1. Log into the Exostar SAM Platform. Select the **My Account** tab, then select **Edit Profile** sub-tab.
2. Review your profile information and update any changes. Click **Continue** to save your changes.



3. A review page will be displayed. Review and verify that the changes have been entered correctly. Click **Submit**.

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4. The confirmation page is displayed confirming that changes have been processed. You will receive an email confirming the changes.

Shared Users

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

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

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

View Organization Details

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

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

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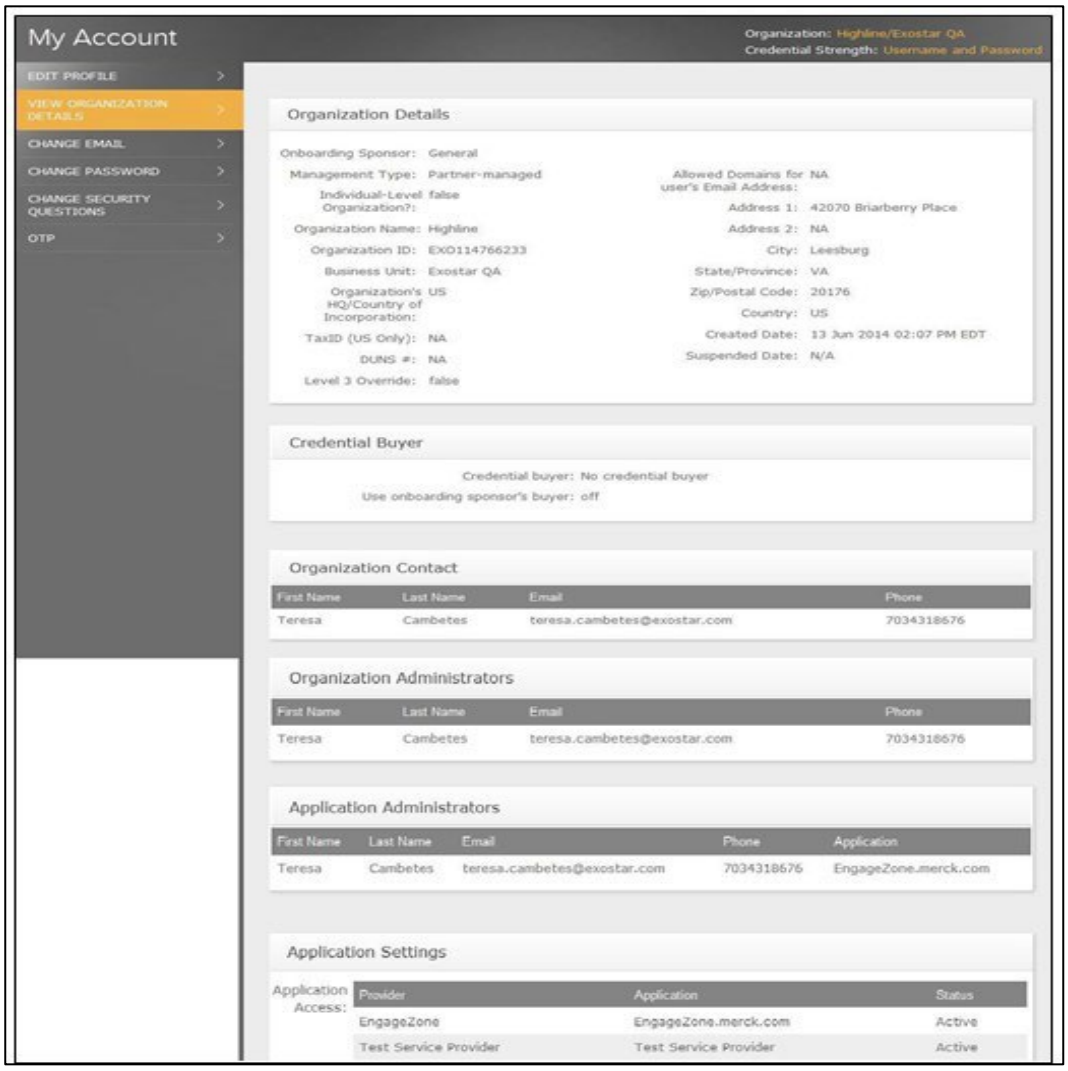

Change Email

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

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

How to Change the Email Address Associated with my Account

1. Log into SAM. Select the **My Account** tab and click the **Change Email Address** sub-tab.
2. Enter your **New Email Address** in the box. Then click **Continue** to save the changes.
3. You will receive an email with an activation code.

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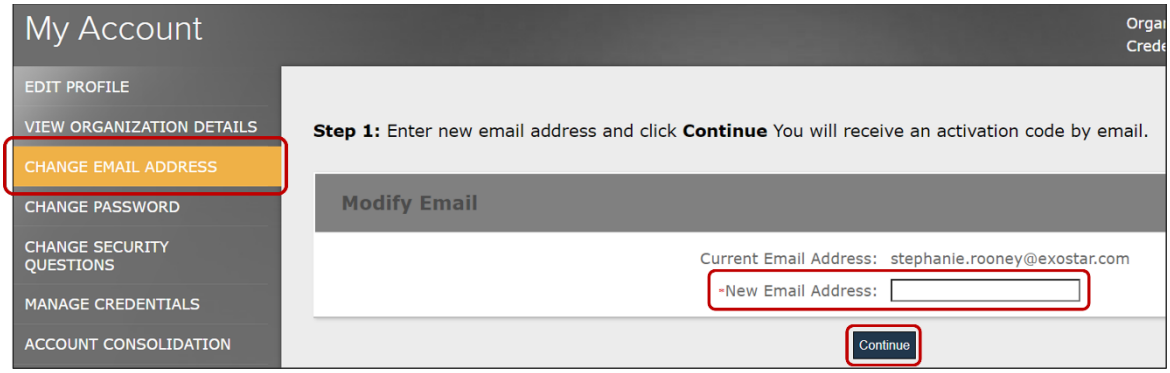


4. Enter the **Activation Code**. Then click **Activate**.

Change Password

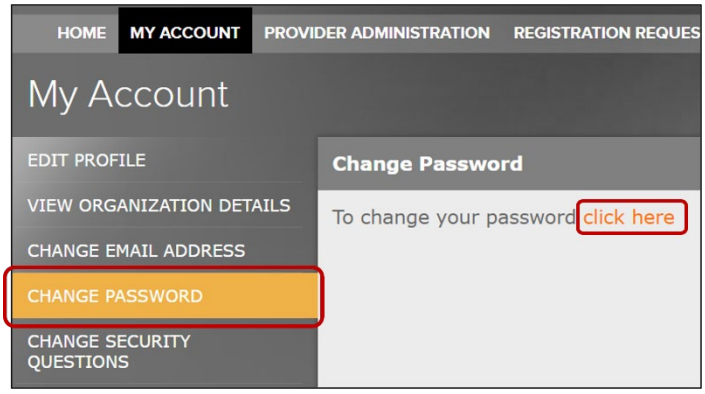
The **Change Password** feature allows users to change their SAM Platform account passwords. The new password must comply with the Password Strength Policy:

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

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

To Change your Password

1. Log into SAM and select the **My Account** tab. Then click **Change Password** sub-tab.
2. To change your password, select the "**click here**" link.



3. Enter your old password, then enter your **New Password**, and re-enter the new password to

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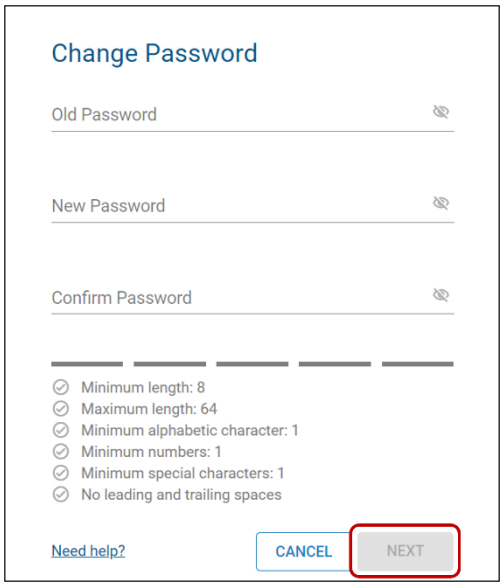
confirm. Click **Next** to save your changes.



4. Your password is successfully changed. Login to your SAM Account with your new password.

Change Security Questions

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

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

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

How to Change Your Security Questions

1. Log into your SAM account and select **My Account** tab, then click the **Change Security Questions** sub-tab.
2. Find which questions you want to change, then from the drop-down list select the new question and provide the answer. Make sure you **Check** the **Change** box for the questions you want to change.

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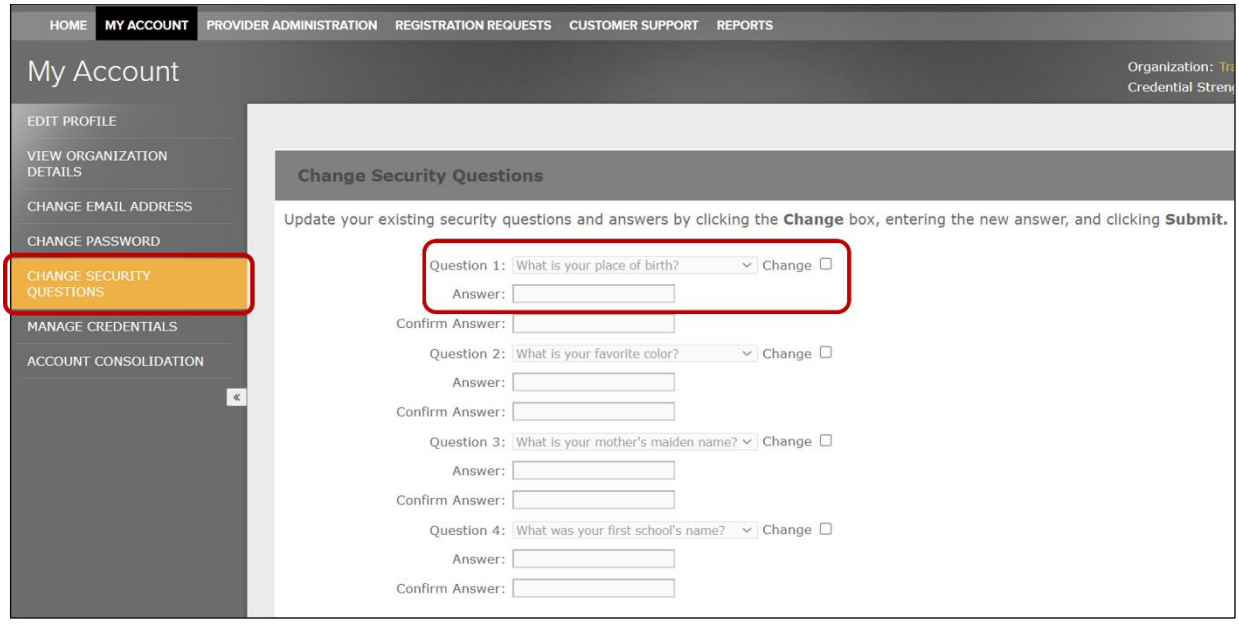

3. Update your changes and click **Submit**. A display message will confirm that changes have been save (you will receive a confirmation email as well).

One Time Password (OTP)

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

Identity Proofing

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

There are two types of proofing:

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

US-Based User Proofing: Experian Proofing

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

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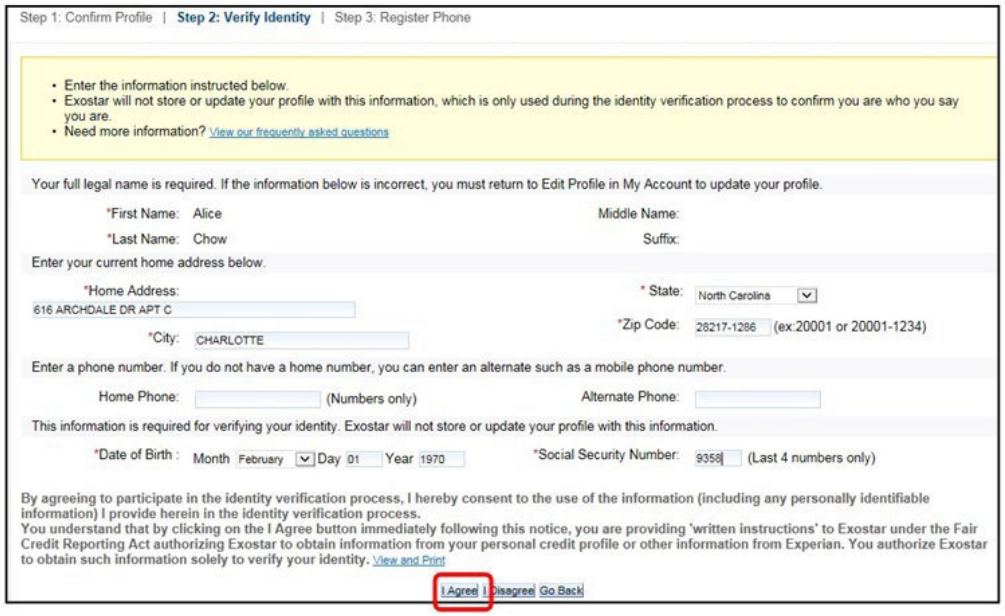
IMPORTANT:

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

Follow the steps below to complete Experian proofing:

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



2. A list of questions regarding your financial and residential history will be presented. These questions, and your responses, will be used to verify your identity, so please answer carefully and accurately.
3. Once you complete all questions, click **Next** to continue.

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

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

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

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International-Based User Proofing – Webcam Proofing

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

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

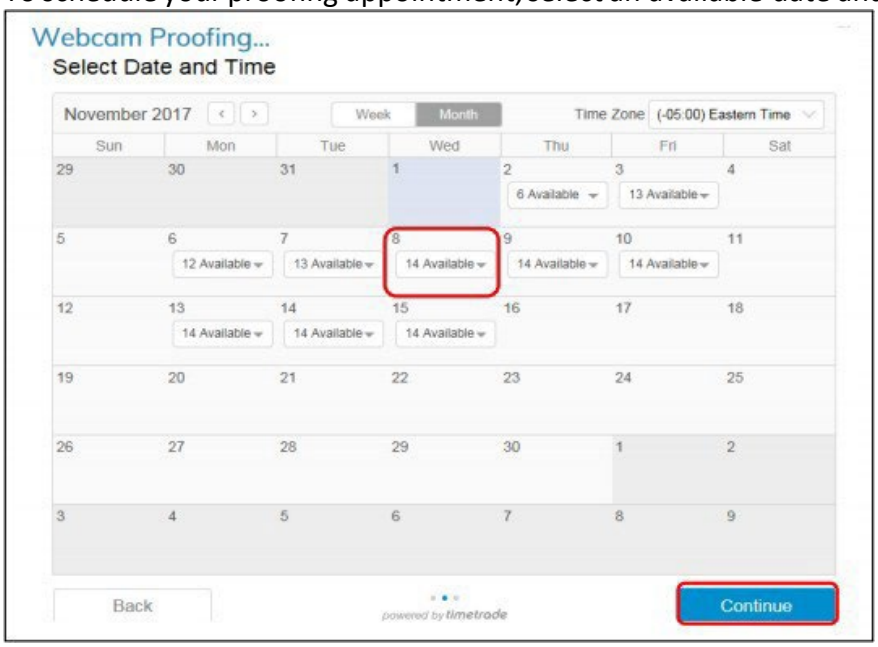
For additional information about webcam proofing requirements, including acceptable documentation and troubleshooting, please visit the Webcam Proofing Resource page.

Schedule Your Proofing Appointment

Follow the steps below to complete Webcam proofing:

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

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



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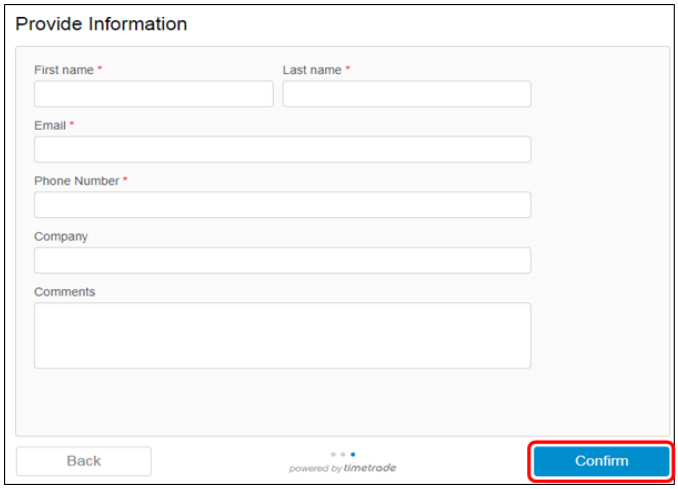
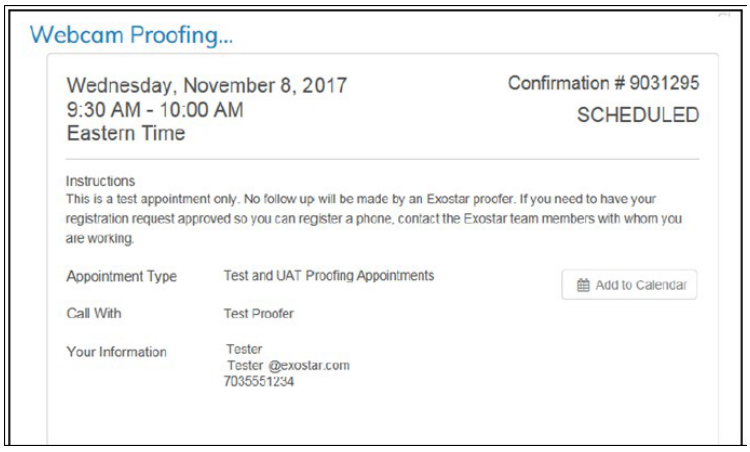
3. Enter your contact information. Click **Confirm**.



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



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

5. You will be contacted by the Exostar Proofer on the day of your appointment.

During your proofing appointment, you will be required to answer a series of "yes" or "no" questions, and provide acceptable, unexpired identification via a webcam to the proofer. Visit the Live Video Proofing Resource page for more information.

Once you successfully complete proofing, the proofing agent will provide you with the activation code. Use this code to activate your credential.

OTP Registration and Management

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

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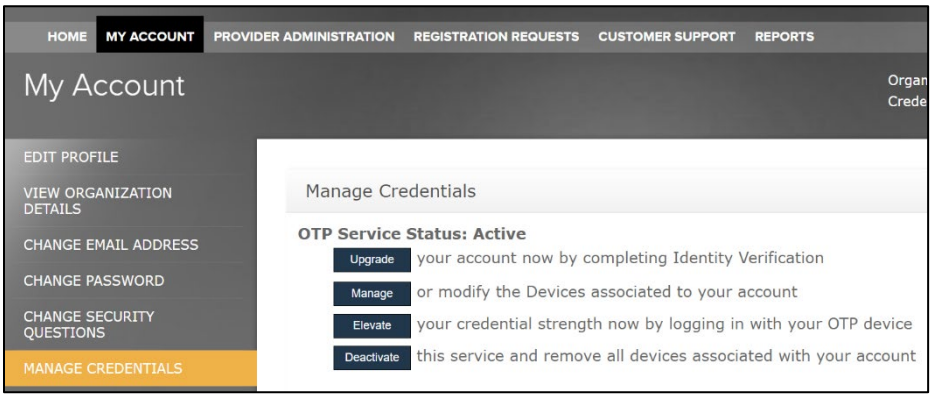
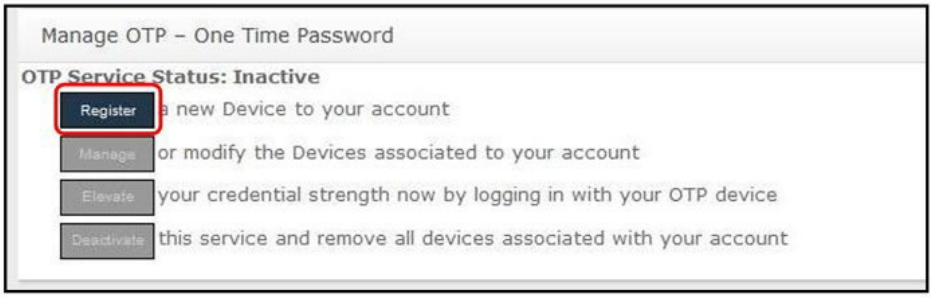
How to Register your OTP Credential

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

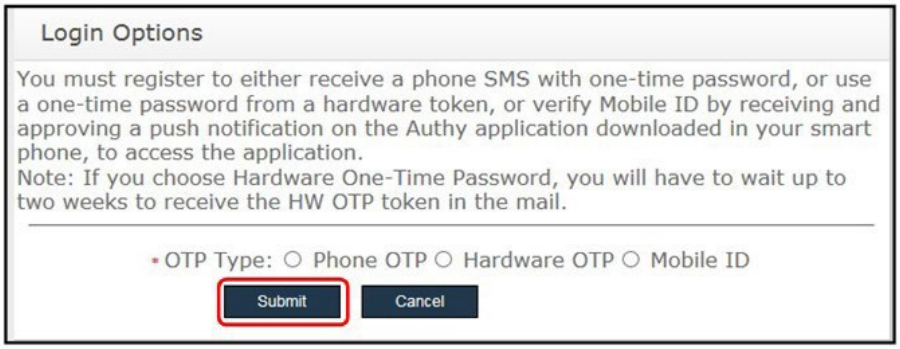
1. Log into your SAM account and select the **My Account** tab and click the **Manage Credentials** sub-tab.



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



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



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

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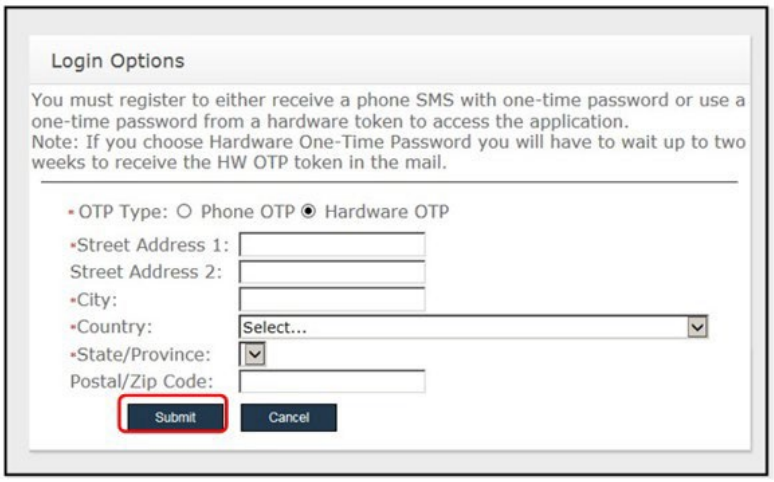
4. For OTP Hardware, enter your address, and click **Submit**.



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

Phone OTP Credential

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

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

Exostar Mobile ID Credential

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

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4. You will receive a successful registration message. Click **Complete**.

Login with Registered Credential

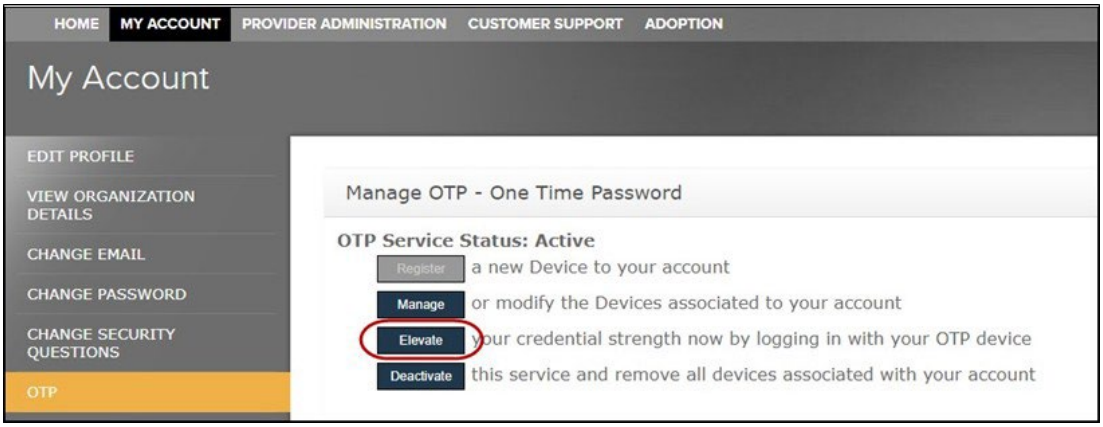
In order to access you applications, you need to log into SAM with your registered credential. Follow the instructions below to login with the credential:

OTP Hardware

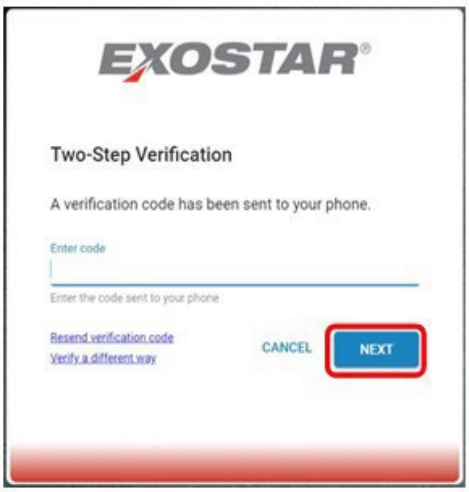
1. Log into your Exostar SAM Platform account with your username and password.
2. Select **One Time Password**. Click **Continue**.
3. You will receive the OTP Authentication page. Enter the One-Time Password code displayed on your token in the **One-Time Password** field. Click **Authenticate**.
4.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

Phone OTP

1. Log into your Exostar SAM Platform account with your username and password.
2. Navigate to **My Account** and click **OTP** in the left-hand menu.
3. Click **Elevate** button.



4. The phone number and delivery method default. Click **Send.**
5. You will receive the authentication code via your selected delivery method. Enter the code in the field provided. Click **Next.**



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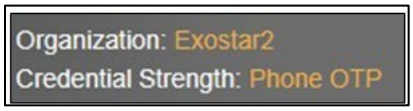
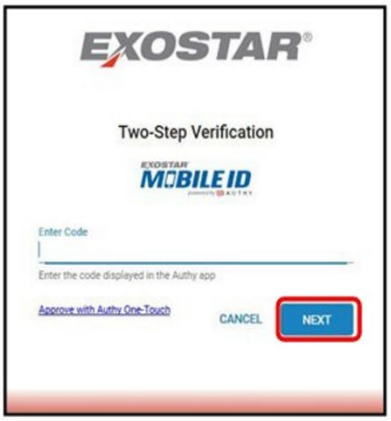
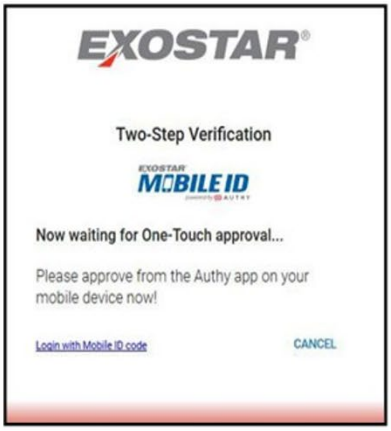
6. You are authenticated with your Phone OTP credential. The credential strength (upper, right corner) will display **Phone OTP**.



Exostar Mobile ID

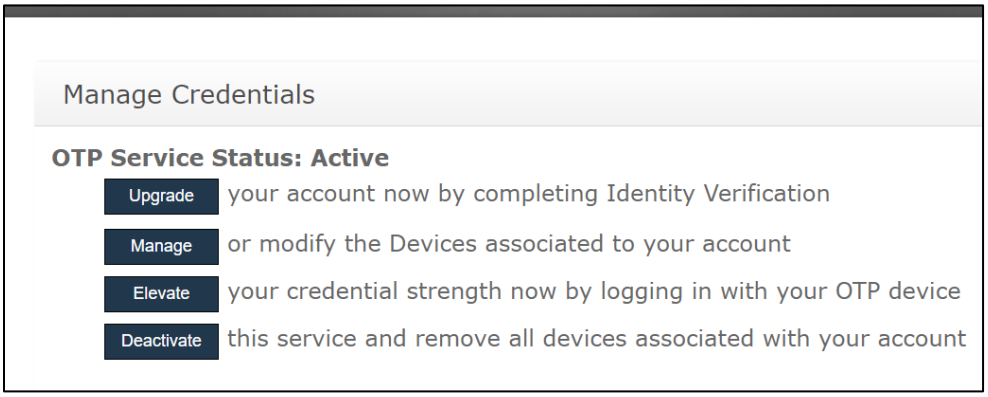
1. Log into your Exostar SAM Platform account with your username and password.
2. Select **One Time Password**. Click **Continue**.
3. If OneTouch is selected, a push notification is sent to the Authy™ application on the mobile device tied to your user profile.
4. Enter the 6-digit code into the field provided on the Mobile Credential Authentication screen and click **Next**.
5. Once Authy is Approved, a confirmation screen will display.





OTP Management

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



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

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phone. You can register up to three phone numbers.

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

- **Elevate:** If you log into Exostar SAM Platform without your OTP credential, you can choose to elevate your credential strength during the same session and without logging out.

  1. To elevate, click **Elevate**.
  2. Fill out the required information, and click **Submit**.
  3. The credential strength (upper, right corner) should now display your credential (it should no longer say "username and password").

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

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

Account Disablement

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

- **Account activation not completed for more than 180 days:** If you haven't completed first time login (account activation) for your Exostar SAM Platform account within 180 of account creation, your account will be deleted. If your account is deleted, you will have to re-register in the system.
- **Application access suspension:** Each application can set the parameters for the number of days of inactivity that will lead to access suspension. If your application access is due for suspension in 30 days or less, each time you login to your Exostar SAM Platform account, you will be presented with a flash screen to remind you to access the application and the number of days to suspension. To ensure that you do not lose access to the applications you need, it is a good practice to login to your Exostar SAM Platform account regularly and access available applications.
- **Application access deletion:** If your application access has been suspended for 'x' number of days as specified by the application owner, your access to the application will be deleted. You will be notified regarding this deletion 30 days in advance.
- **Active account deletion**: If the last active application subscription is suspended, your Exostar SAM Platform account will be suspended 30 days after the application suspension. You will be notified regarding this suspension 30 days in advance. Contact Exostar Customer Support for information on how to re-establish application access.

User Self Registration

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

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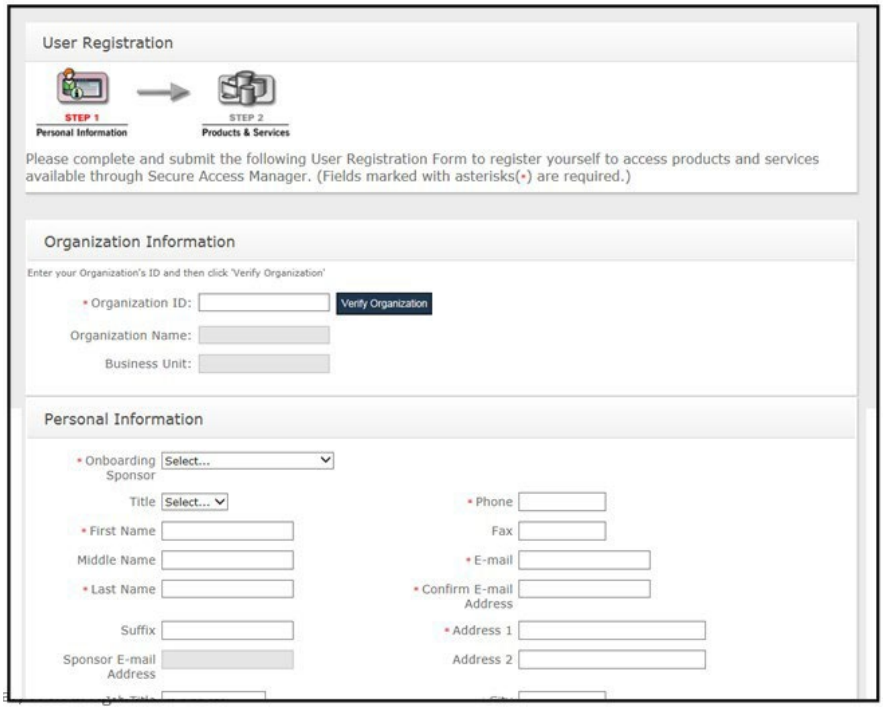
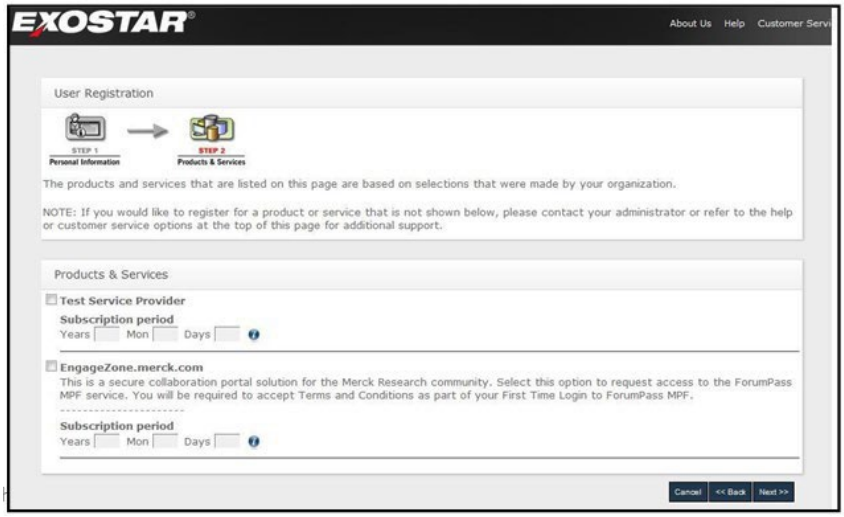
1. Go to https://secureaccess.exostar.com/userRegistration. Complete all required fields.



NOTES:

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

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



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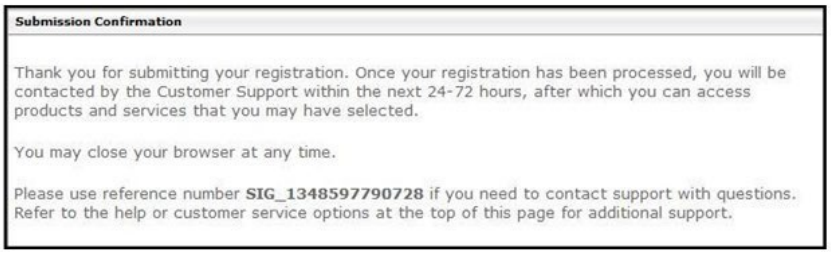
NOTE: *In order to access applications with the higher level of security (i.e., a Level 3 application), the Sponsor Email Address must match an email within the sponsoring organization.*

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



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

4. You will receive an email confirming that your request has been received. No further action is required on your part at this time. Your Organization Administrator will be notified of the pending request.
5. Once your request has been approved, you will receive an email notification. This email is very important because it will contain the activation link for your SAM account.

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