



# Exostar Secure Access Manager (SAM) Administrator Guide

November 2020



## CONTENTS

<b>DOCUMENT VERSIONS .....</b>	<b>5</b>
<b>THE OVERVIEW OF SECURE ACCESS MANAGER (SAM) PLATFORM FOR LIFE SCIENCES.....</b>	<b>6</b>
<b>ADMINISTRATIVE ROLES.....</b>	<b>6</b>
ORGANIZATION ADMINISTRATOR.....	6
SERVICE PROVIDER ADMINISTRATOR.....	6
ADOPTION ADMINISTRATOR.....	7
CREDENTIAL ADMINISTRATOR.....	7
MANAGEMENT & PORTAL ADMINISTRATOR.....	7
EXOSTAR PORTAL ADMINISTRATOR .....	7
<b>THE TYPES OF USERS AND ORGANIZATIONS .....</b>	<b>8</b>
ORGANIZATION-MANAGED ORGANIZATION.....	8
EXOSTAR-MANAGED ORGANIZATION .....	8
SPONSOR-MANAGED ORGANIZATION .....	8
SHARED USERS.....	9
<b>NAVIGATIONAL OVERVIEW.....</b>	<b>10</b>
ACCESS THE EXOSTAR SAM PLATFORM PORTAL .....	10
<i>How to Activate my Account .....</i>	<i>11</i>
<i>How to Login to Exostar's SAM Platform .....</i>	<i>13</i>
<b>GENERAL ADMINISTRATIVE FUNCTIONALITY.....</b>	<b>15</b>
THE CREDENTIAL ADMINISTRATION TAB – CREDENTIAL AND SOTP CLIENT ADMINISTRATORS .....	15
<i>How to Approve a User's Request for a Token.....</i>	<i>16</i>
<i>How to Cancel a User's Request for a Token.....</i>	<i>17</i>
<i>How to Deny a User's Request for a Token.....</i>	<i>19</i>
SOTP Client Administrators .....	21
THE ADMINISTRATION TAB – ORGANIZATION ADMINISTRATORS.....	21
View Users.....	22
Column Customization .....	22
How to Add a New User.....	23
Add New User Link .....	23
User Upload .....	25
Update Organization .....	27
User Self-Registration.....	28

<i>How to Locate and Modify Users</i> .....	28
<i>How to Resend Activation Email</i> .....	30
<i>How to Suspend, Reactivate, and Delete User Accounts</i> .....	31
<i>How to Suspend, Edit, and Reactivate Application Access</i> .....	31
<i>How to Reset User's Permanent Password and Security Questions</i> .....	32
<i>How to Delete a User Account in Exostar's SAM Platform</i> .....	33
<i>How to Subscribe your Organization to an Application</i> .....	33
<i>How to Update Organization's Allowed Email Domains</i> .....	34
<i>How to Add Multiple Users to an Application - Batch Subscription</i> .....	36
<i>How to Reset Inactive Accounts – Batch Reset</i> .....	37
THE PROVIDER ADMINISTRATION TAB - SERVICE PROVIDER ADMINISTRATORS .....	38
<i>Approve: Approving User Access Requests</i> .....	38
<i>How to Filter and Search for Users</i> .....	39
<i>How to Process User Access Requests</i> .....	39
<i>View Users: Locate and Update User Accounts</i> .....	40
<i>Column Customization</i> .....	41
<i>How to Locate a User Account</i> .....	41
<i>How to Reset User's Permanent Password and Security Questions</i> .....	42
<i>How to Suspend a User Subscription</i> .....	42
<i>How to Reactivate a User's Subscription</i> .....	43
<i>How to Reset User's Permanent Password</i> .....	44
<i>How to Resend Activation Email</i> .....	44
<i>How to Resend User's Provisioning Record</i> .....	45
<i>View Organizations</i> .....	46
<i>How to Locate an Organization</i> .....	46
<i>Suspend an Organization's Access</i> .....	46
<i>Reactivate an Organization's Access</i> .....	47
<i>Approval Settings</i> .....	48
<i>How to Add an Organization to the Approved List</i> .....	48
<i>How to Remove an Organization from the Approved List</i> .....	49
<i>Application Settings</i> .....	49
<i>Email Verification for Applications</i> .....	50
<i>Email Restriction for Applications</i> .....	50

THE REGISTRATION REQUESTS TAB – ORGANIZATION AND APPLICATION ADMINISTRATORS .....	51
<i>User Access Approvals (Verify Link)</i> .....	52
THE ADOPTION TAB – ADOPTION ADMINISTRATORS .....	54
<i>Invitation Process Overview</i> .....	54
<i>Search for a User</i> .....	54
<i>Invite an Existing User</i> .....	55
<i>Add User to an Existing Organization</i> .....	56
<i>Add a New Organization and User</i> .....	58
<i>User Upload</i> .....	60
<i>How to Track Invitations</i> .....	63
<b>ORGANIZATION REGISTRATION OVERVIEW .....</b>	<b>65</b>
NEW ORGANIZATION REGISTRATION .....	65
EMAIL CONFIRMATIONS .....	69
ACCEPT TERMS AND CONDITIONS .....	69
<b>NEXT STEPS .....</b>	<b>69</b>
<b>APPENDIX A – CSV FILE REQUIREMENTS – USER UPLOADS .....</b>	<b>70</b>
<b>APPENDIX B – CSV FILE REQUIREMENTS – USER UPLOADS FOR ADOPTION ADMINISTRATORS .....</b>	<b>72</b>
<b>APPENDIX C – CSV FILE REQUIREMENTS – BATCH SUBSCRIPTION .....</b>	<b>73</b>
<b>APPENDIX D – CSV FILE REQUIREMENTS – BATCH OTP .....</b>	<b>74</b>

## DOCUMENT VERSIONS

Version	Impacts	Date	Owner
Identity and Access Management Platform –SAM 3.9	<ul style="list-style-type: none"><li>• 500-limit user account export has been removed. There is no maximum limit for export results.</li></ul>	September 2018	Ajay Ejantkar
Secure Access Manager – SAM 4.0	<ul style="list-style-type: none"><li>• Changed the product name from IAM to SAM</li><li>• Updated the text and screenshots for the new login and authentication flow (all sections in “Login to your Exostar SAM Platform Account”).</li></ul>	July 2019	Ajay Ejantkar
SAM 4.1	<ul style="list-style-type: none"><li>• Activation workflow</li></ul>	March 2020	Payal Mahensaria
SAM 4.3	<ul style="list-style-type: none"><li>• Product Platform Upgrade – Phase 1</li><li>• Profile Management – Service Provider Administrator Role Improvement</li><li>• Bugs, Defects, and Others</li></ul>	Nov 2020	Stephen Okoba

## THE OVERVIEW OF SECURE ACCESS MANAGER (SAM) PLATFORM FOR LIFE SCIENCES

Exostar's Secure Access Manager (SAM) Platform for Life Sciences 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 Exostar's 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 Functions include:

- Extend the basic concept of Web based Single-Sign-On (SSO) to support single sign on and access to multiple applications.
- Support authentication credentials of varying assurance levels.
- Facilitate an organizational approach to registration, account management and application access.
- Provide organizational control over new user approval and access requests.

## ADMINISTRATIVE ROLES

All new SAM accounts are created as general user accounts. Later, these accounts can be updated to include administrative roles. There are six types of administrative roles within SAM: Organization Administrator, Service Provider Administrator, Adoption Administrator, Credential Administrator, Management & Portal Administrator, and Exostar Portal Administrator. Below we explain the unique duties and responsibilities of each admin type.

### Organization Administrator

The **Organization Administrator** (Org Admin) is an organization-level administrator who can create new accounts, process registration requests, manage existing accounts, resend activation emails, reset permanent passwords, and manage the organization details. Org Admins are also responsible for accepting the online Terms and Conditions Agreement.

### Service Provider Administrator

The **Service Provider Administrator** (SP Admin) is an application-level administrator who can grant approvals to users and organizations for application access, view users, resend activation emails, reset permanent passwords and application subscriptions, and view organizations and set organizational approval setting. The SP Admin is also often referred to as the application owner.

## Adoption Administrator

The **Adoption Administrator** (Adoption Admin): is an application and system-level administrator who can access the Adoption Module, create new user accounts and new organizations, subscribe users to applications, and track invitations.

## Credential Administrator

The Credential Administrator: is an organization level administrator who can approve, deny, or cancel a user's request for an OTP product (e.g. OTP Hardware Token).

## Management & Portal Administrator

The Management & Portal Administrator (MPA) role is similar to the Org Admin that provides the ability to manage users within multiple organizations that fall under an Onboarding Sponsor or tenant.

- Ability to reset a user's permanent password
- Ability to view organization details
- Ability to modify user details
- Ability to suspend/restore account/application access

**Note:** MPAs cannot manage Shared User profiles.

## Exostar Portal Administrator

The Exostar Portal Administrator (EPA) role is an Exostar role with full administrative privileges. The EPA role has the following capabilities:

- Ability to reset a user's permanent password
- Ability to view organization details
- Ability to modify user details
- Ability to suspend/restore account/application access

There is also the **EPA Lite** role. This role contains most of the same functionality as the **EPA**, except for the following:

- Ability to assign an R-IDP for an Organization
- Ability to suspend or restore account application access
- Ability to deactivate or activate an Org application subscription

## THE TYPES OF USERS AND ORGANIZATIONS

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

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 these features:

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

### 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. To sum up, an Exostar-Managed Organization will have all of the below features:

- It will be registered and managed by Exostar
- Users will accept T & Cs only once, after subscribing to their first application
- Typically, it includes independent users who don't belong to a particular organization
- These users need access to multiple sponsor applications
- Users need to be added to an organization by Exostar, the Sponsor Inviter API, or Adoption Module Administrator.

### 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

## Shared Users

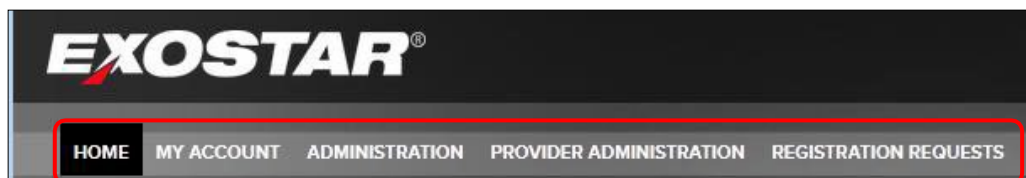
Users who are under a Sponsor-Managed Organization (SMO) have the ability to become Shared Users. Shared Users can access applications outside of their sponsored organization. Once users become shared, they will need to accept Terms and Conditions for the first application belonging to a different sponsor. If any additional non-sponsored applications are added, Terms and Conditions will not be required again.

Once a user subscribes to a non-sponsor application, Organization Administrators and MPAs from the SMO will have only limited control over this user. For instance, they can no longer execute the following functions:

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

## NAVIGATIONAL OVERVIEW

Several functional tabs are available within the Exostar SAM Platform Portal. The **Home** and **My Account** tabs are available to all users, while the **Administration**, **Provider Administration**, and **Registration Requests** tabs are available only to designated administrators.



- **Home** tab is available to all users. Applications can be launched from this tab. It also contains several sub-tabs of information, including **My Applications**, **My Organization**, **My Tasks**, and **Account Summary**.
- **My Account** tab allows users to edit their account profile, view organizational details, manage email address, change password and security questions, and manage OTP tokens (if applicable).
- **Administration** tab is available to *Organization Administrators (Org Admins)*. You can add new users within this tab and update existing user profiles. In addition, you may subscribe users to applications, and manage your organization information and subscriptions.
- **Registration Requests** tab is available to *Organization Administrators*. From this tab, admins can approve organizations and user application requests.
- **Provider Administration** tab is available to *Service Provider Administrators (SP Admins)*. This tab allows SP Admins to manage Organization and User account subscriptions and access. The SP Admin role is a system-level admin role assigned by Exostar.
- **Adoption** tab is available to *Adoption Administrators (Adoption Admins)*. It allows Adoption Admins to invite external or internal users to SAM and to bulk-subscribe users to applications or services. The Adoption Admin role is a system-level administrator role assigned by Exostar.
- **Credential Administration** tab is available to *Credential Administrators*. It allows Credential admins to accept, deny, or cancel users' requests for OTP Hardware tokens.

### [Access the Exostar SAM Platform Portal](#)

Whether logging in to Exostar 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>.

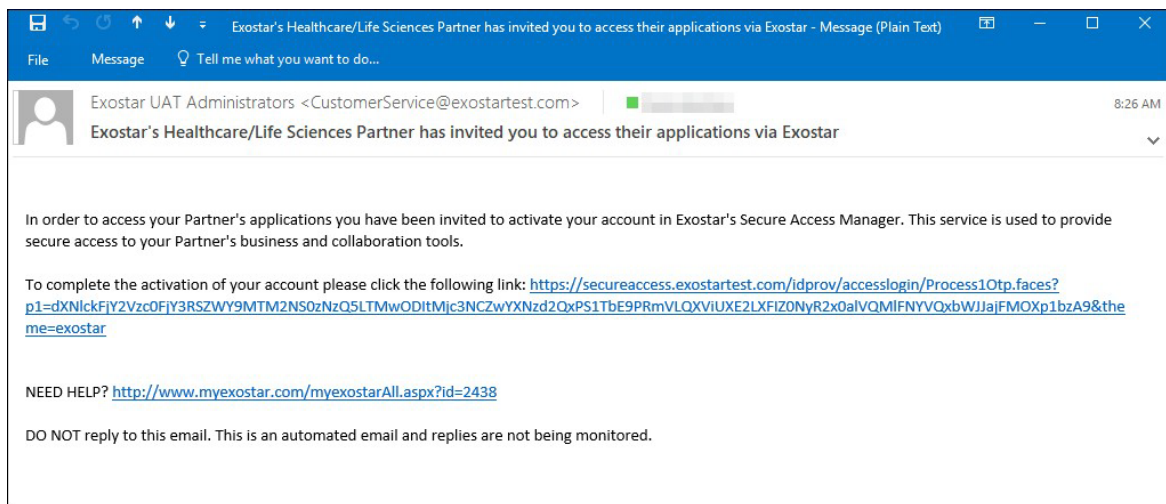
## How to Activate my Account

Upon creation of an Exostar SAM Platform account, you will receive an email notification with the activation link for your new SAM Platform account. During the account activation process, you will be required to create a permanent password and answer security questions. The system will send the account activation email two times every 30 days, and new activation notifications will supersede activation links sent in previous emails.

Please note that, in some cases, you must complete the account activation within 180 days, or the system will deactivate your account. This does not apply to EAG users. The SAM account password expires every 90 days.

Below are steps to complete your account activation:

1. Upon receipt of the activation email, click the **Activation Link** provided in the email.



**NOTE:** If you do not use the link in email to initiate the process, but instead choose to enter your email address on the Exostar SAM Platform login screen, the system will prompt captcha verification in order to resend the **Activation** email.

2. The SAM activation screen displays. Click **Next**.

**EXOSTAR®**

### Activate Your Account

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

- ✓ Set Account Password
- ✓ Set Account Security Questions

**NEXT**

3. Enter your new password and confirm. Click **Next** to proceed.

**EXOSTAR®**

### Create a password

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

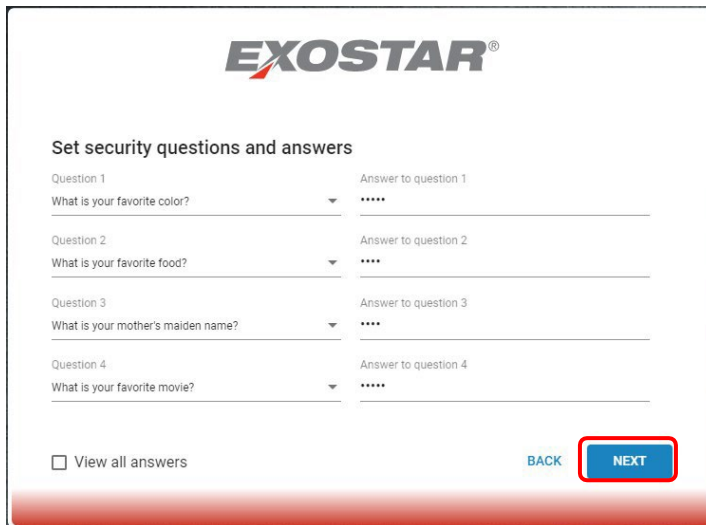
Enter new password  
IAM1234@!

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

**NEXT**

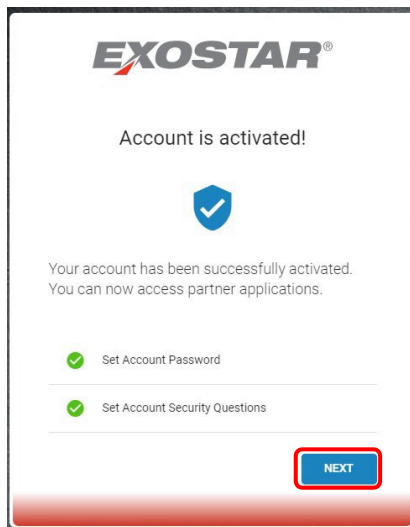
**NOTE:** Select the eye icon to view password input. Passwords expire after 90 days.

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



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

5. You will see the screen confirming the activation of your account. Click **Next** to redirect to Exostar's SAM Platform portal. Your account authentication is now complete.

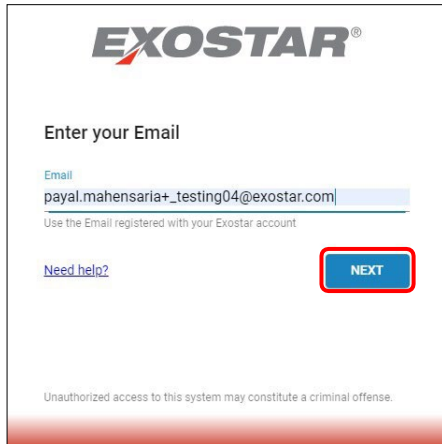


The screenshot shows the Exostar logo at the top. Below it is the heading "Account is activated!". There is a blue shield icon with a white checkmark. Below the icon, the text reads: "Your account has been successfully activated. You can now access partner applications." There are two green checkmarks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

## How to Login to Exostar's SAM Platform

After the account authentication login, follow these steps to login to your **Exostar SAM Platform** account:

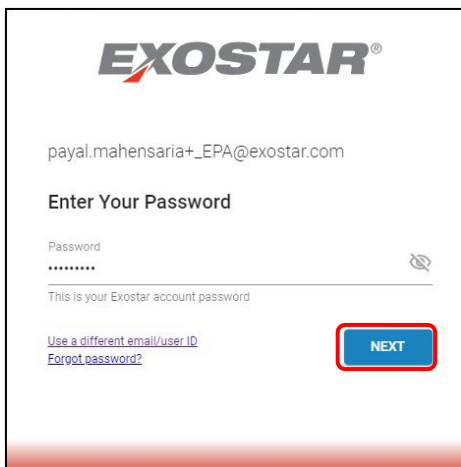
1. Go to the Exostar SAM Platform login portal: <https://secureaccess.exostar.com>.
2. Enter your Email address and click **Next**.



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

**NOTE:** SSO/EAG users will have a cookie installed redirecting them to their organization’s R-IDP. If the user deletes the cookie or uses another browser, entering the email address will direct the user to authenticate with R-IDP or company credential once again.

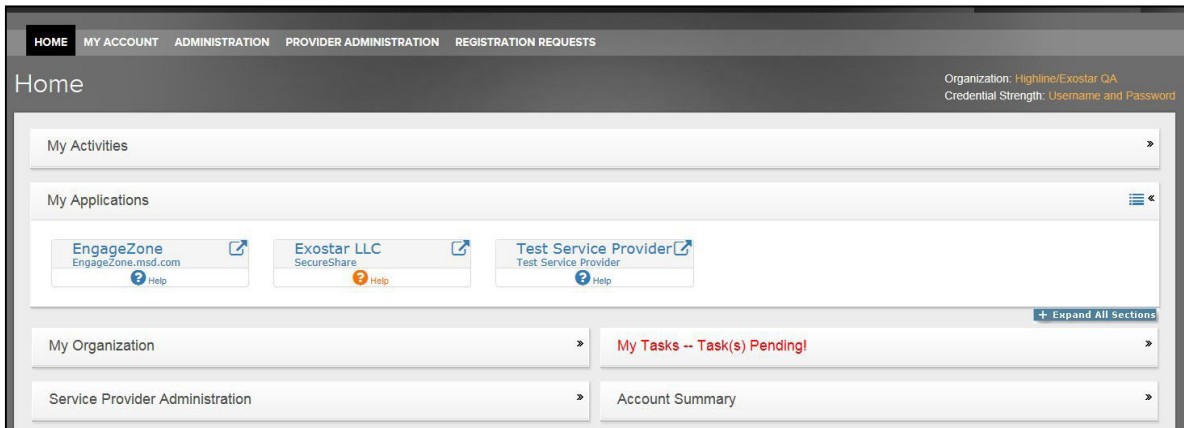
3. Enter your password. Click **Next**.



The screenshot shows the Exostar login interface at the password entry stage. The Exostar logo is at the top. Below it, the email address "payal.mahensaria+\_EPA@exostar.com" is displayed. The heading "Enter Your Password" is shown. A password input field contains several dots, with a visibility toggle icon to its right. Below the input field, a note states "This is your Exostar account password". To the left of the "NEXT" button are two links: "Use a different email/user ID" and "Forgot password?". The "NEXT" button is highlighted with a red border.

**NOTE:** If the system recognizes your account has not been activated yet, you will be prompted to resend the activation email.

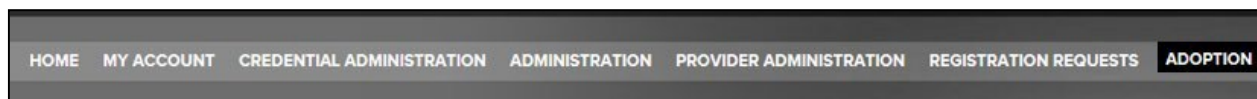
4. Upon successful login, the Exostar SAM Platform **Home** tab displays. The **Home** tab includes access to your active applications and organization information. Click an application in the My Applications section to launch it.



**NOTE:** In some cases, the *Terms and Conditions* may display the first time you access an application. Please contact Exostar Customer Service for more information.

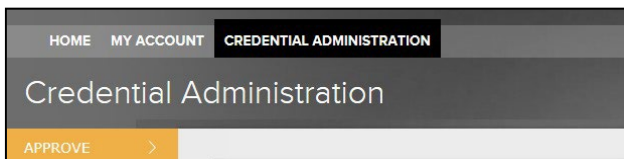
## GENERAL ADMINISTRATIVE FUNCTIONALITY

Upon login to the Exostar SAM Platform portal, the landing pages consist of several tabs. The **Home** tab and the **My Account** tab are available to all users. Only Administrators will have access to the following tabs: Credential Administration, Administration, Provider Administration, Registration Requests, and Adoption.



### The Credential Administration Tab – Credential and SOTP Client Administrators

The **Credential Administration** tab is the location where Credential Administrators can process user requests for OTP hardware tokens. These tokens provide additional security for applications secured in SAM, and Credential Admins are responsible for granting authorization to users requesting these tokens.



During the first attempt to launch an application, the user will be prompted to submit a request for a for a Multi-Factor Authentication token.

## How to Approve a User's Request for a Token

1. Go to <https://secureaccess.exostar.com> and login to the Exostar SAM Platform with a Credential Administrator account. Access the **Credential Administration** tab.
2. Use search filters (search by *User Id* or *Email Address*) to locate a specific request. Click **Search**.

The screenshot shows the 'Credential Administration' page with a search bar and an action menu. The search bar contains 'Search For:' followed by an empty input field, 'Using: User ID' with a dropdown arrow, and 'Search' and 'Clear' buttons. Below the search bar is an 'Action:' dropdown menu with 'Approve Selected Requests' selected and an 'Apply' button.

3. Place a checkmark next to the request you would like to action.

OTP Requests				
Select	Request ID	User ID	Last Name	First Name
<input type="checkbox"/>	HWOTPRQ_1238159036_1490986785256	bhanuril_4548@securepass.exostartest.com	bhanuri	laxmi
<input checked="" type="checkbox"/>	HWOTPRQ_1170408125_1496420273361	bhanuril_7627@securepass.exostartest.com	bhanuri	laxmi

**NOTE:** You can only action requests with a status of Pending.

4. Select **Approve Selected Requests** from the **Action** menu.

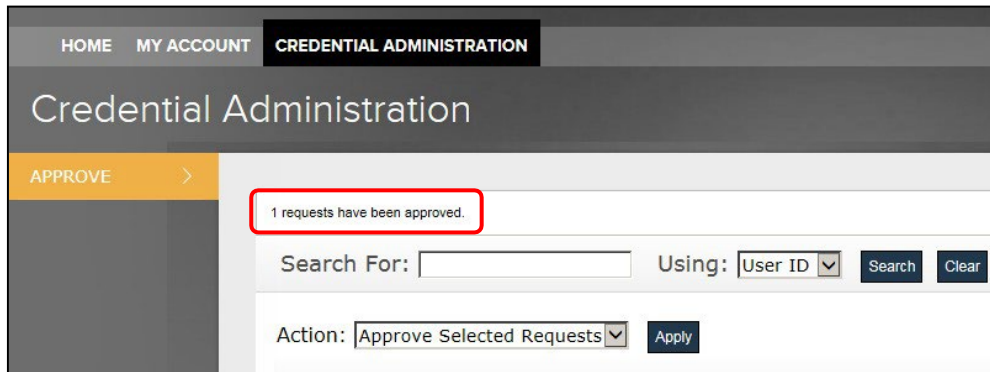
The screenshot shows the 'Action:' dropdown menu open, displaying options: 'Select Action', 'Approve Selected Requests', 'Deny Selected Requests', and 'Cancel Selected Requests'. The 'Approve Selected Requests' option is highlighted with a red box. An 'Apply' button is visible to the right of the dropdown.

5. Click **Apply** to proceed with the action.

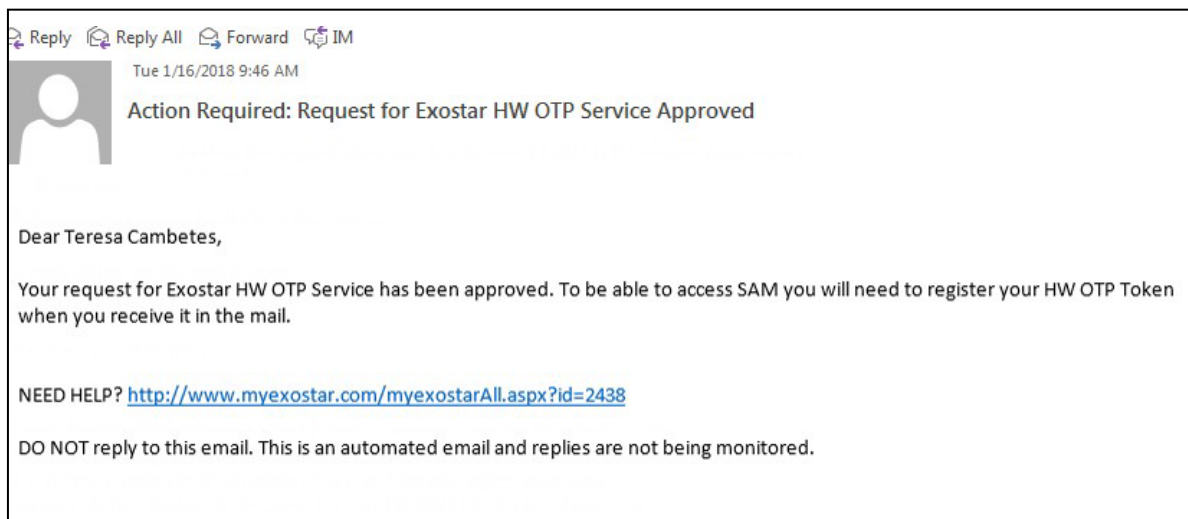
The screenshot shows the 'Action:' dropdown menu with 'Approve Selected Requests' selected. The 'Apply' button is highlighted with a red box.



- The requested action is completed, and the system reflects confirmation of the action.



- The system generates an email to the user informing them that their OTP request was approved.



## How to Cancel a User's Request for a Token

- Go to <https://secureaccess.exostar.com> and login to Exostar's SAM Platform with a Credential Administrator account. Access the **Credential Administration** tab.

2. Use search filters (search by *User Id* or *Email Address*) to locate a specific request. Click **Search**.

The screenshot shows the 'Credential Administration' page with a search bar highlighted in red. The search bar contains the text 'Search For:' followed by an empty input field, 'Using: User ID' with a dropdown arrow, and 'Search' and 'Clear' buttons. Below the search bar, there is an 'Action:' dropdown menu set to 'Approve Selected Requests' and an 'Apply' button.

3. Place a checkmark next to the request you would like to action.

OTP Requests				
Select	Request ID	User ID	Last Name	First Name
<input type="checkbox"/>	HWOTPRQ_1238159036_1490986785256	bhanuril_4548@securepass.exostartest.com	bhanuri	laxmi
<input checked="" type="checkbox"/>	HWOTPRQ_1170408125_1496420273361	bhanuril_7627@securepass.exostartest.com	bhanuri	laxmi

**NOTE:** You can only action requests with a status of **Pending**.

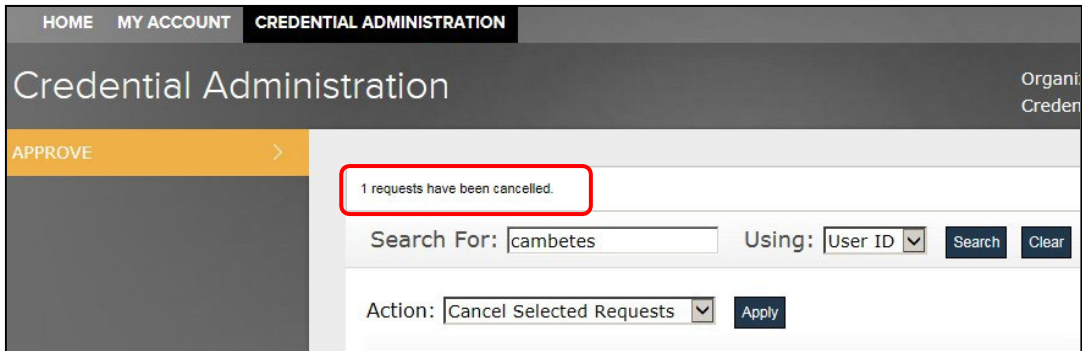
4. Select **Cancel Selected Requests** from the **Action** menu.

The screenshot shows the 'Action:' dropdown menu open, with 'Cancel Selected Requests' highlighted in red. The menu options are: 'Select Action', 'Approve Selected Requests', 'Deny Selected Requests', and 'Cancel Selected Requests'. An 'Apply' button is visible to the right of the dropdown.

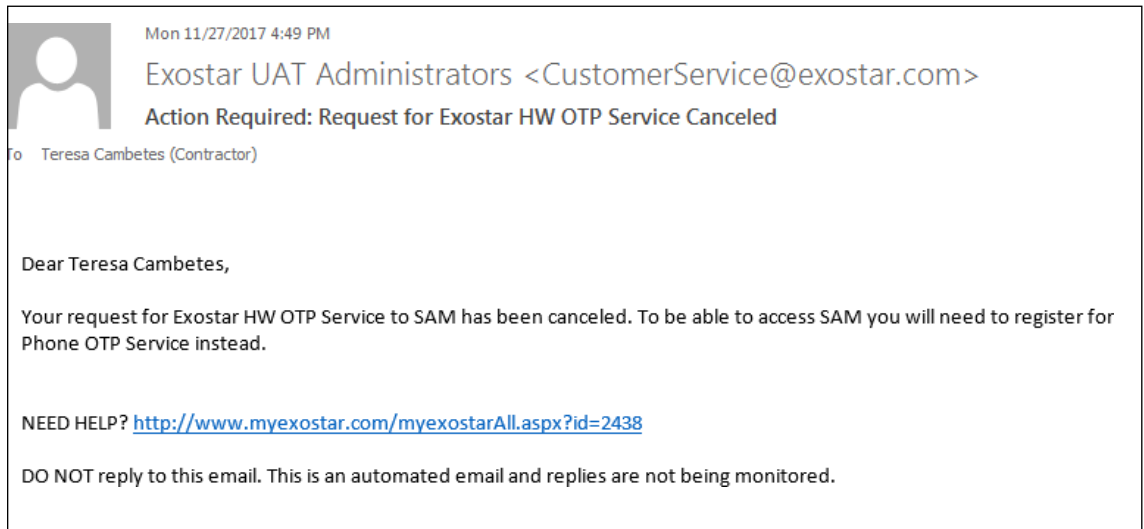
5. Click **Apply** to proceed with the action.

The screenshot shows the 'Action:' dropdown menu set to 'Cancel Selected Requests' and the 'Apply' button highlighted in red.

- The requested action is completed, and the system reflects confirmation of the action.

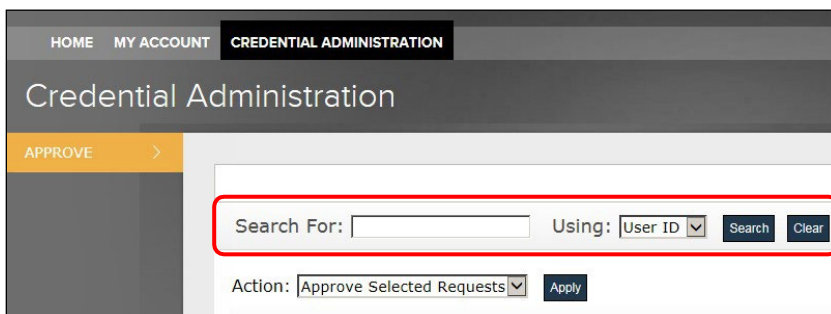


- The system generates an email to the user informing them their OTP request was cancelled.



## How to Deny a User's Request for a Token

- Go to <https://secureaccess.exostar.com> and login to Exostar's SAM Platform with a Credential Administrator account. Access the **Credential Administration** tab.
- Use search filters (search by *User Id* or *Email Address*) to locate a specific request. Click **Search**.



- Place a checkmark next to the request you would like to action.

OTP Requests				
Select	Request ID	User ID	Last Name	First Name
<input type="checkbox"/>	HWOTPRQ_1238159036_1490986785256	bhanuril_4548@securepass.exostartest.com	bhanuri	laxmi
<input checked="" type="checkbox"/>	HWOTPRQ_1170408125_1496420273361	bhanuril_7627@securepass.exostartest.com	bhanuri	laxmi

**NOTE:** You can only action requests with a status of Pending.

- Select **Deny Selected Requests** from the **Action** menu.

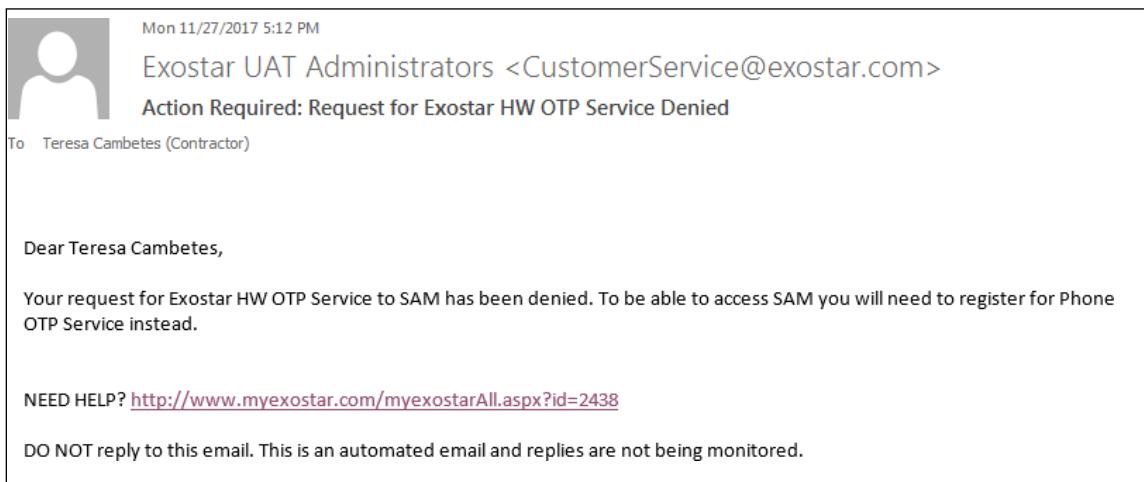
Search For:  Using: **User ID**

Action: **Select Action**   
**Approve Selected Requests**  
**Deny Selected Requests**  
**Cancel Selected Requests**

- Click **Apply** to proceed with the action.

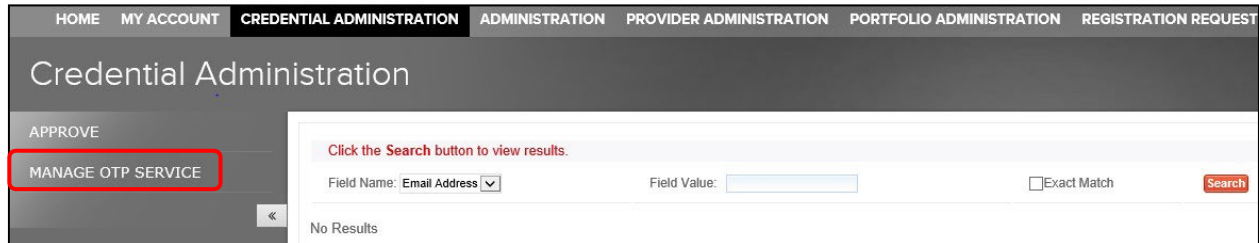
Action: **Deny Selected Requests**

- The request is denied, and the system reflects confirmation of the action.
- The system generates an email to the user informing them that their OTP request was denied.



## SOTP Client Administrators

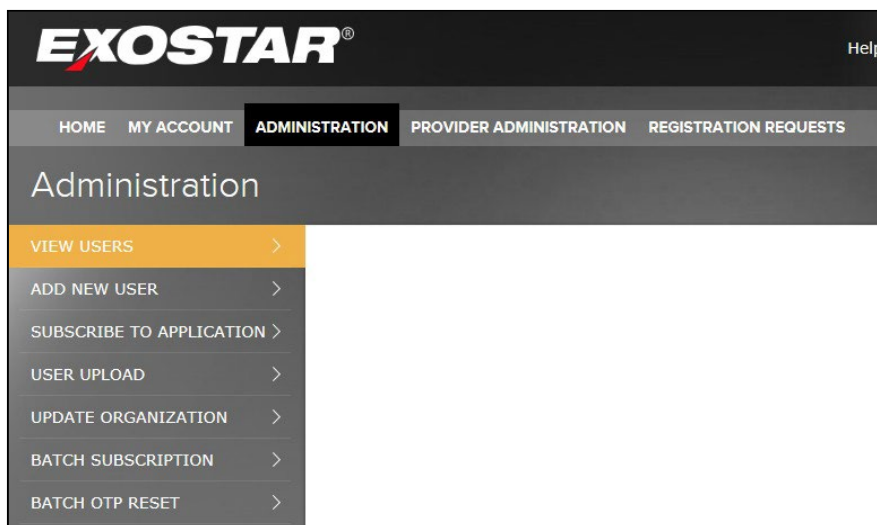
SOTP Client Administrators have access to the managed OTP service area in Exostar’s SAM Platform. Click the **Credential Administration** tab, and navigate to the **Manage OTP Service** sub-tab:



You can search records by e-mail address, user’s first and last name, and user reference. To view the full list of records, click **Search** without selecting the search value. Click the hyperlinked User ID to access individual accounts. Client Administrators can perform the following activities: revoke accounts, manage One-Time Password Service for clients, and manage tokens, phones, and credentials.

## The Administration Tab – Organization Administrators

The **Administration** tab is available to Organization Administrators. Within this tab, you can create new users and update existing user profiles. In addition, the administrator may subscribe their organization to additional publicly available applications.



The **Administration** tab contains the functionality that allows Organization Administrators to:

- View and manage existing users
- Manually add new users
- Subscribe the organization to new public ally available applications

- Upload/Add users in bulk
- Update organization
- Subscribe users to a resource in bulk
- Resend activation email using Batch OTP Reset

## View Users

View Users allows you to view users associated with your organization's account.

To View Users:

1. Click **View Users**.
2. Enter user criteria and click **Search**. If you have no search criteria, click **Search**.
3. The list of users will display.
4. Click the **User ID** to view details.

## Column Customization

Columns that display are customizable. You can set columns to view the data that you want displayed.

To Customize Columns:

1. Click **Set Columns**.

The screenshot shows the 'Administration' section of the Exostar interface. The 'VIEW USERS' option is selected in the left sidebar. The main content area displays a search bar with 'Last Name' selected and 'evans' entered. Below the search bar is a table of users. The table has columns for User ID, Last Name, First Name, Email Address, Organization ID, Organization Name, and RIDP User ID. A red box highlights the 'Set Columns' button in the top right corner of the table area.

User ID	Last Name	First Name	Email Address	Organization ID	Organization Name	RIDP User ID
evansd_5469	Evans	Dee	davida.evans+_04@exostar.com	EXO11823812	Fulfillment_DCS/Exostar QA	
evansd_7756	evans	davida	Davida.Evans@exostar.com	EXO11823812	Fulfillment_DCS/Exostar QA	

2. Column options will display. Select the columns you want to set for your display. User ID is an unchangeable column, and it displays with any customization.

**Set Columns**

Select All Restore Defaults

**Required Columns**

User ID

**Selected Columns**

Last Name  
 First Name  
 Email Address  
 Organization ID  
 Organization Name  
 RIDP User ID  
 User Status

**Available Columns**

Middle Name  
 RIDP Name  
 Active Applications  
 Pending Applications  
 User Level Sponsor  
 System Role(s)  
 User Unique Identifier  
 Shared User (Y/N)  
 Account Creation Date  
 Last Access Date  
 Country of Residence  
 Phone Number  
 Fax Number  
 Job Title  
 Account Suspended Date

3. After completing selection, click **Save**. Going forward, this is your defaulted view. You can revert to the original display by clicking **Restore Default**. Search results can be exported to *.xls* format. Additionally, there is no account maximum for returned and exported results.

## How to Add a New User

You can add new users to the Exostar SAM Platform in several ways. Org Admins and MPAs can add new users to SAM using the **Add New User** or the **User Upload** links. In addition, you can direct users to a self-registration link, where they can submit their organization requests.

- **Add New User** link allows Org Admins and MPAs to create new SAM user
- **User Upload** link allows Org Admins and MPAs to upload users to their organizations in bulk, using a *.csv* file.
- **Self-Registration** allows a user to initiate the registration process. Requests are approved by Org Admins and MPAs.

## Add New User Link

The *Add New User* link allows Org Admins to add new users manually, by filling out their user profile and application subscription information. To add an individual user:

1. Login to the Exostar SAM Platform. Access the **Administration** tab and select **Add New User**. Even though password message displays, password is not required.
2. In the **Add New User** section of the page, complete all required fields.

**Administration** Organization: High Credential Strength

**VIEW USERS** >

**ADD NEW USER** >

**SUBSCRIBE TO APPLICATION** >

**USER UPLOAD** >

**UPDATE ORGANIZATION** >

**BATCH SUBSCRIPTION** >

**BATCH OTP RESET** >

**Password Guidelines:** Passwords must be 8 to 16 characters long. They must include at least 4 different alphabetic character, 1 numeric character, and 1 special character. Leading and trailing spaces are not allowed.

**Add New User**

\*Onboarding Sponsor: General

Title: Select...

\*First Name: [ ]

Middle Name: [ ]

\*Last Name: [ ]

\*Phone: [ ]

Fax: [ ]

\*Street Address 1: [ ]

Street Address 2: [ ]

\*City: [ ]

\*Country: UNITED STATES

3. In the **Application Settings** section of the page, select a **Role** for the new user. Roles include User, Organization Admin, Application Admin, and both Organization Admin and Application Admin.

**Application Settings**

Role: User

- User
- Organization Admin
- Application Admin
- Organization Admin & Application Admin

4. Select the applications users should have access to. Click **Continue**. The list of applications will include all applications the organization is subscribed to.

**Application Settings**

Role: User

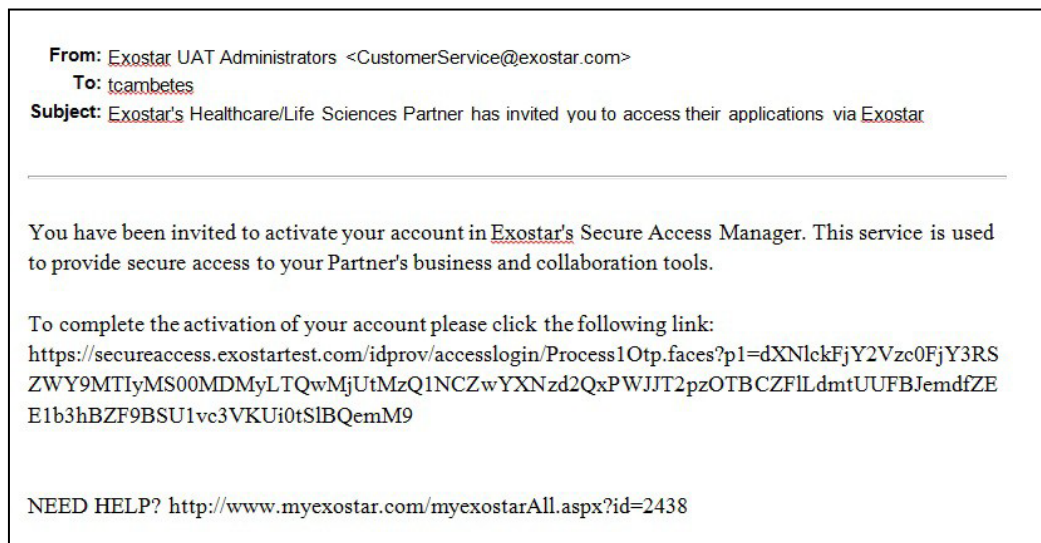
Application Access:	Provider	Application	Select	Subscription Period
	exostar	TEST Service Provider	<input type="checkbox"/>	Years [ ] Mon [ ] Days [ ] ⓘ
	EngageZone	EngageZone.merck.com	<input type="checkbox"/>	Years [ ] Mon [ ] Days [ ] ⓘ
	Appian	Appian BPM	<input type="checkbox"/>	Years [ ] Mon [ ] Days [ ] ⓘ
	EngageZone	EngageZone Large Data Exchange	<input type="checkbox"/>	Years [ ] Mon [ ] Days [ ] ⓘ
	EngageZone	EngageZone Mobile	<input type="checkbox"/>	Years [ ] Mon [ ] Days [ ] ⓘ
	Merck	Clinical Provisioning Portal	<input type="checkbox"/>	Years [ ] Mon [ ] Days [ ] ⓘ
	Exostar	EMFTEST	<input type="checkbox"/>	Years [ ] Mon [ ] Days [ ] ⓘ

**Continue**



**NOTE:** If the **Application Administrator** or **Organization Administrator & Application Administrator** role is assigned, you must also designate the applications this user will be authorized to administer. By default, the Application Administrator role is disabled for most applications.

5. Review and verify the information you have entered. You may click **Modify** to make any changes or **Cancel** to cancel this transaction. Click **Submit** to complete.
6. The confirmation page will display. The user will receive an email containing the account activation link.

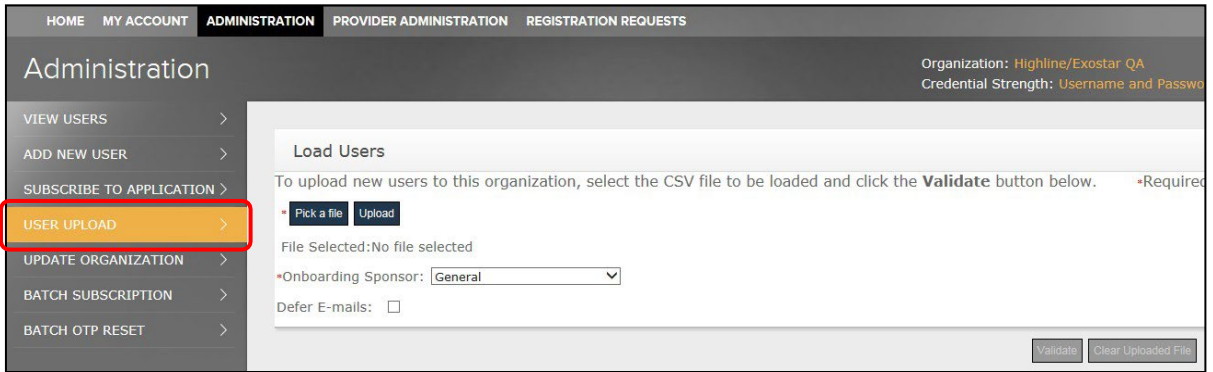


## User Upload

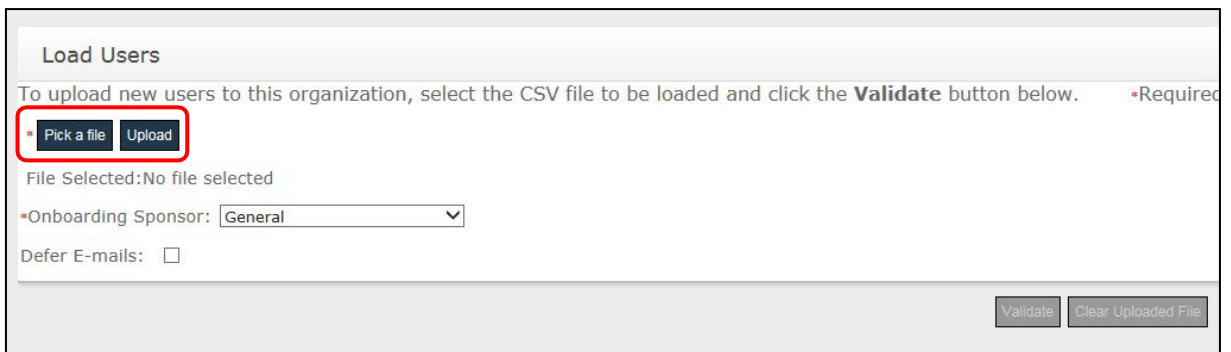
Uploading users into Exostar SAM Platform with the **User Upload** feature is the most common use case for adding new users. This option allows administrators to add individual users or users in bulk, while importing their user and organization information directly and seamlessly.

To begin, prepare a CSV file containing user and organization information. See Appendix for samples and templates of acceptable .csv file formats. When preparing the file, include the R-IDP User ID, when applicable. R-IDP will provision enterprise users directly using enterprise credentials.

1. Access the **Administration** tab. Click **User Upload** link.



- To upload new users to your organization, create a .csv file that contains user information. See **Appendices A through D** for file format and field requirement information.
- Once you create the file, click **Pick a file**. Navigate and select the desired file. Click **Upload**.



- Using the drop-down menu, select the **Onboarding Sponsor**.



**NOTE:** The **Onboarding Sponsor** selection will affect the branding, help links, and content specific to that sponsor.

- After selecting the file and onboarding sponsor, click **Validate**. The system will examine the file. If the system detects errors, they will display on the screen, marked with a red X. User information with errors will not be processed. Please correct the errors, and re-upload the file.

6. Click **Commit** to upload the users.



Line	Email	Name	Errors
✓ 2	carole.smelik_9109@exostar.com	Luke Skywalker	
✓ 3	carole.smelik_9110@exostar.com	Darth Vader	

7. The system will create new accounts and send emails to users informing them about their new SAM accounts.

## NOTES:

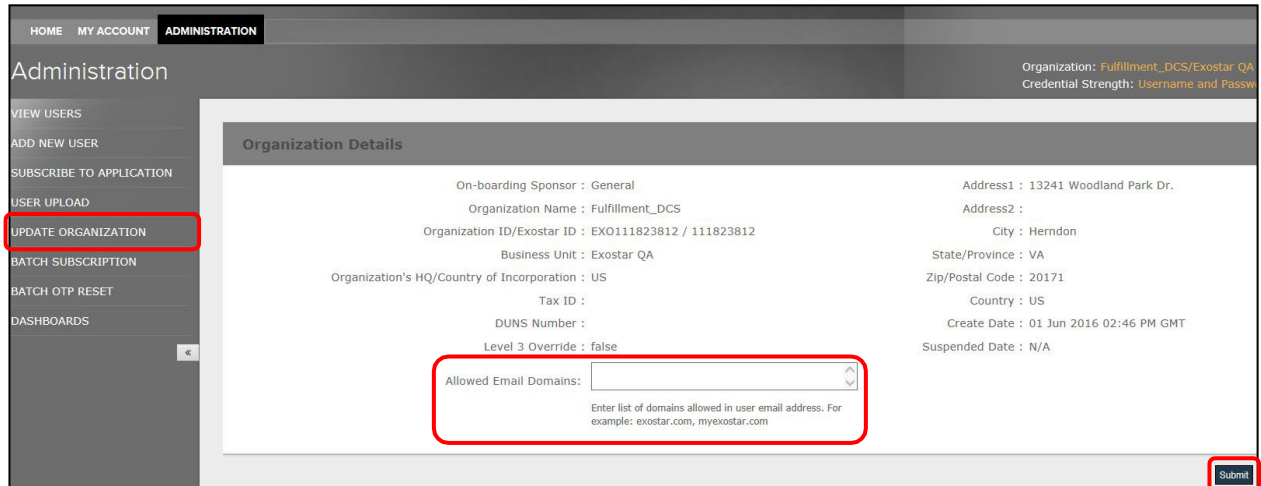
- If users are created with the *Defer E-emails* option enabled, **no first-time login emails will be sent to these users**. Depending on what type of user is created in the .csv file (username/password vs. SSO user), there are two options to enable the users:
  1. **Username/Password users:** Use the **Resend Activation Email** link from within the user profile or use the **Batch OTP Reset** option to resend the activation email to multiple users.
  2. **SSO/Federated/EAG users:** There is no option to retrigger login emails for SSO users. Instead, instruct the users to go to the Exostar SAM Platform Login Page (<https://secureaccess.exostar.com>), and to enter their email address or User ID. Exostar SAM Platform will then link the user to the proper R-IDP.
- If the R-IDP User ID is specified for the user, the system shall link that user to the organization's R-IDP using the specified R-IDP User ID. Instruct the user to go to the Exostar SAM Platform Login page and enter their email address or user ID.
- User not uploaded with an R-IDP ID will receive the **Account Activation** email.

## Update Organization

Organization Administrators can restrict email domains allowed to register for a SAM Platform account. When domains are added (e.g. @xyz.com), only users with the specified email domains are allowed to register.

**NOTE:** If domain restriction is added, existing users within an organization must meet the domain restriction criteria. To add domain restriction, follow the steps below:

1. From the **Administration** tab, click **Update Organization**.
2. Enter allowed domains in the **Allowed Email Domains** field (e.g. exostar.com, xyz.com, etc). Click **Submit**.



3. Domains that are entered can register for a user account. Unlisted domains will be unable to complete registration.

## User Self-Registration

Admins may direct users to the **Self-Registration** portal to initiate their Exostar SAM Platform account registration.

The **Self-Registration** website is: <https://secureaccess.exostar.com/userRegistration>.

**NOTE:** The Admin must provide the Org ID to the user in order for the user to proceed through Self-Registration.

## How to Locate and Modify Users

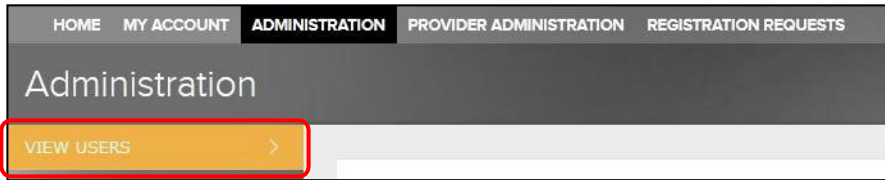
Org Admins can use the **View Users** link to locate existing users and modify user profiles.

You can use the search filters to help narrow your search. Once a user is found, you may view and update their user profile, role, and the applications to which they have access. Do so from the user's **Details** page. This page contains two sections:

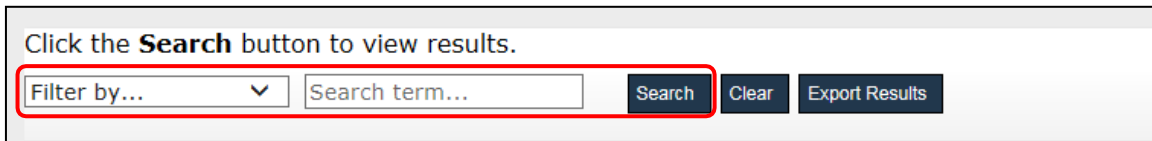
- **User Profile:** here you can view and update the details of the individual's profile.
- **Application Settings:** here you can view and update a user's role, access to applications, and access to SAM. You can also reset the user's one-time password.

To locate and update a user's account:

1. Access the **Administration** tab on the Exostar SAM Platform portal. Click **View Users**.



2. Use filters to narrow your search or view the complete list of users in your Organization by clicking only **Search**.



3. All search results will display. Click the **User ID** to access the user's profile information.

Results Per Page: 25						
User ID	Last Name	First Name	E-mail	RIDP ID	System Role	User Status
<b>cambetest_5862</b>	cambetes	tricia	tcambetes@gmail.com		User	User Suspended
cambetest_5561	Cambetes	Teresa	tcambetes@aol.com		User	Active
cambetest_8565	Cambetes	Teresa	teresa.cambetes@exostar.com		Org Admin, App Admin	Active

4. In the **User Profile** section, you can update any field, excluding the User ID, Role, Org Name, and Org Id. Make changes, and click **Continue**.

**User Profile**

User ID: testt\_2552      \*Phone: 7035551234

Email: tracytest@exostar.com      Fax:

**Modify Email**

Role: User      \*Street Address 1: 123 main street

Organization Name: Highline/Exostar QA      Street Address 2:

Organization Id: EXO114766233      \*City: herndon

Onboarding Sponsor: General      \*State: va

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

\*First Name: tracy      \*Country: UNITED STATES

Middle Name:       Time Zone: GMT

\*Last Name: test      Restricted Access:  On  Off

Suffix:       Created Date: 30 Mar 2015 10:59 AM EDT

Job Title:       Suspended Date(From SAM): N/A

Sponsor Email:       Last SAM Access Date: N/A

The **Modify Email** option allows you to update a user's email address. After an Org Admin modifies the email address, the user will receive an email with the activation code and steps for activating their new email address. The new email address will not be reflected in Exostar SAM Platform until the user completes the activation process.

**NOTE:** This feature will not work with SSO/EAG users. SSO/EAG users who need to update their email must contact their Corporate Helpdesk.

5. Verify the changes. You can click **Modify** to go back and make further changes, or **Cancel** to go back to the **Search** page. Click **Submit**.
6. A confirmation page will display, and the changes will be saved in the system.

**NOTE:** Admins of a Sponsor-Managed Org will not be able to update user profiles once a user becomes “Shared,” or subscribed to at least one non-sponsor application.

## How to Resend Activation Email

Organization or Service Provider Administrators can resend the **Activation Email** for inactive users from the **Application Settings** section of the **User Details** page. Locate the user and access their profile page by following the steps above. Then complete these steps:

1. If a user account has an **Inactive** status, Org Admins can click **Resend Activation Email**.

The screenshot shows the 'Application Settings' interface. At the top, there is a 'Role:' dropdown menu set to 'User'. Below this is a table with the following columns: 'Provider', 'Application', 'Expiration Date', 'Last Access Date', 'Status', and 'Action'. The table contains four rows of application access data. Below the table, the user status is shown as 'User Inactive', with a 'Resend Activation Email' button highlighted by a red box and a 'Delete User' button next to it. A 'Continue' button is located at the bottom right of the interface.

Provider	Application	Expiration Date	Last Access Date	Status	Action
Test Service Provider	Test Service Provider			Active	Edit Suspend
EngageZone	EngageZone.msdc.com			Inactive	Request Access
Exostar LLC	SecureShare			Inactive	Request Access
Exostar LLC	SecureShare - MD Anderson			Inactive	Request Access

Status: User Inactive **Resend Activation Email** Delete User

Continue

2. A confirmation page will display. Click **Submit** to resend the email.

Click submit to re-generate first time login activation link. The user will receive a new email with the new activation link.

---

Resend Activation Email

User ID: pattersonp\_4932

**Submit**

## How to Suspend, Reactivate, and Delete User Accounts

There are several options for account access management available on the User Details page in the **Application Settings** section:

- Suspend, Edit and Reactivate access to an application
- Suspend access to Exostar’s SAM Platform
- Permanently delete access to Exostar’s SAM Platform

The system will notify users by email of a suspension or deletion action.

**NOTE:** Please note that Sponsor Managed Organization Administrators and MPAs cannot suspend, reactivate, or delete **Shared User** accounts. However, Service Provider Administrators can suspend, reactivate, or edit access.

## How to Suspend, Edit, and Reactivate Application Access

1. Locate the user and access their profile page (as detailed above).
2. The Org Admin can **Suspend, Edit, and Reactivate** a user’s access to an application.
3. Click **Suspend** next to the appropriate application to suspend access to it.
4. Click **Edit** to modify the subscription period for the application.

Role:

Application Access:	Provider	Application	Expiration Date	Last Access Date	Status	Action
	Test Service Provider	Test Service Provider			Active	<b>Edit</b> <b>Suspend</b> Delete

Status: Active **Suspend User Access** **Reset Permanent Password** **Reset Security Question** **Delete User**

**Continue**

5. Click **Continue**. A confirmation page will display. The user status will change to **Inactive**.

**Edit User**

User ID: cambetest\_5561  
Full Name: Teresa Cambetes  
New Status: Disabled

[Return to User Profile](#)

- Return to the user's profile page. The **Application Settings** section shows the user's status as **Suspended**. To reinstate access to the application, click **Activate**.

**Application Settings**

Role:

Application Access:	Provider	Application	Expiration Date	Last Access Date	Status	Action
	EngageZone	EngageZone.msdc.com			Suspended	<b>Activate</b>

Status: Active **Reset Permanent Password** **Reset Security Question**

- A confirmation page will display.

**NOTE:** Sponsor Managed Organization Administrators and MPAs cannot suspend, edit, or reactivate non-sponsored applications on Shared Users Exostar SAM Platform accounts. However, Service Provider Administrators can suspend, reactivate, or edit access.

### How to Reset User's Permanent Password and Security Questions

- Locate the user and access the profile page (as detailed above).
- The Org Admin can **Reset Permanent Password** and **Reset Security Question**. To reset the user's permanent password, click **Reset Permanent Password**. Click **Reset Security Question** to reset the user's security question.

Status: Active **Suspend User Access** **Reset Permanent Password** **Reset Security Question** **Delete User**

- The user will receive an email with instructions on how to reset the permanent password and security questions.

**NOTE:** Please be advised that once a user becomes a **Shared User**, Sponsor Managed Org Admins and MPAs will be unable to reset their password. SP Administrators can reset permanent password or resend the activation email.



## How to Delete a User Account in Exostar's SAM Platform

1. Locate the user and access the profile page (as detailed above).
2. The Org Admin can **Suspend** or **Delete** a user's access to Exostar's SAM Platform. To suspend access, click **Suspend User Access**. Click **Delete User** to permanently delete a user account in SAM.



3. A confirmation page will display.

**NOTE:** Sponsor Managed Organization Administrators and MPAs cannot permanently delete Shared Users Exostar SAM Platform accounts.

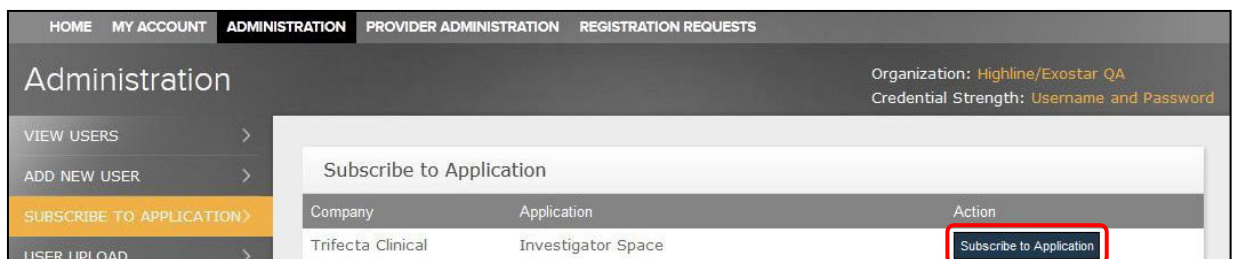
## How to Subscribe your Organization to an Application

The **Subscribe to Application** link allows an Org Admin to initiate an application subscription for their organization.

**NOTE:** Most applications are invitation-only and require the Exostar EPA to complete the subscription.

To subscribe your organization to an application:

1. Access the **Administration** tab. Locate the desired application and click **Subscribe to Application**.



2. Complete the Administrator information page.

3. You may choose to select an existing administrator from the drop-down list or enter information for a new administrator. Click **Next**.

**Administrator**

**Roles and Responsibilities**

Access to the application requires designation of the following role: Application Administrator (App Admin): The Application Administrator is required to approve individual requests for access to the application. Such approvals constitute your organization's approval for a given user to be granted access. The Application Administrator shall have the authority to approve or deny such requests.

Administrator:

Title

\* First Name

Middle Name

\* Last Name

Suffix

Sponsor E-mail Address

Job Title

\* Phone

Fax

\* E-mail

\* Confirm E-mail Address

\* Address 1

Address 2

\* City

\* Country

\* State/Province

\* Zip/Postal Code

\* Timezone

4. Confirm the administrator selection and information. Click **Next**.
5. The submission confirmation will display. It will contain a reference number.

**Submission Confirmation**

Thank you for submitting your registration. Once your registration has been processed, you will be contacted by the Customer Support within the next 24-72 hours, after which you can access products and services that you may have selected.

You may close your browser at any time.

Please use reference number **SIG\_1428506146296** if you need to contact support with questions. Refer to the help or customer service options at the top of this page for additional support.

## How to Update Organization's Allowed Email Domains

Within the **Update Organization** page, Org Admins may choose to identify **Allowed Email Domains** for user email addresses allowed to access Exostar's SAM Platform. If an administrator chooses to define "allowed domains," all existing users will need to conform to this standard.

To define **allowed domains** for an organization:

1. Access the **Administration** tab. Click the **Update Organization** link.

The screenshot shows the Exostar Administration interface. The top navigation bar includes 'HOME', 'MY ACCOUNT', 'ADMINISTRATION', 'PROVIDER ADMINISTRATION', and 'REGISTRATION REQUESTS'. The 'ADMINISTRATION' tab is active. On the left sidebar, the 'UPDATE ORGANIZATION' link is highlighted with a red box. The main content area displays 'Organization Details' for 'Highline/Exostar QA'. The details include: On-boarding Sponsor: General, Address1: 42070 Briarberry Place, Organization Name: Highline, Address2: , Organization ID/Exostar ID: EXO114766233 / 114766233, and City: Leesburg.

2. Enter email domains permitted for automatic provisioning (for example, exostar.org). Click **Submit**.

The screenshot shows the 'Allowed Email Domains' input field. The field is empty and has a red border. Below the field, there is a placeholder text: 'Enter list of domains allowed in user email address. For example: exostar.com, myexostar.com'. A 'Submit' button is located at the bottom right of the form, also highlighted with a red box.

3. If any existing users do not comply with the allowed email domains, you will see the following error message:

Existing Users are using restricted domains names in their email addresses. Please fix these addresses first. Once email addresses have been fixed reenter update to add domain name restriction. The determine accounts that need to be fixed go to 'View Users' for an organization.

Correct the list of domains to include all current user domains or modify user emails to comply with the new restriction.

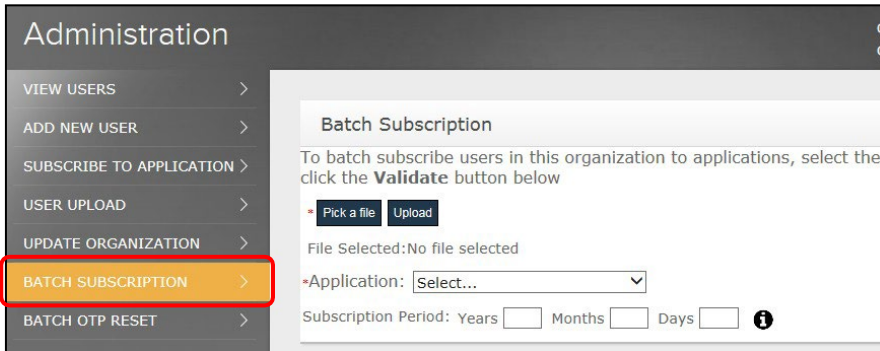
4. Click **Submit**.

**NOTE:** Please be advised once a user becomes a **Shared User**, Sponsor Managed Organization Administrators and MPAs are unable to make any modifications on their Exostar SAM Platform accounts.

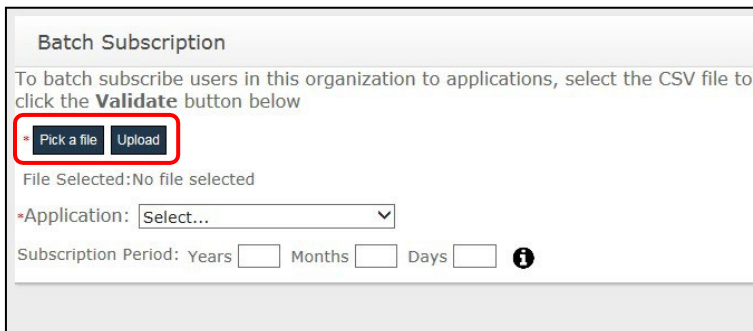
## How to Add Multiple Users to an Application - Batch Subscription

Org Admins may choose to provision existing user accounts to a specific application in bulk, using the **Batch Subscription** function. To do so, simply upload a .csv file containing user IDs and the subscription period (optional). Follow the steps below to complete this batch operation:

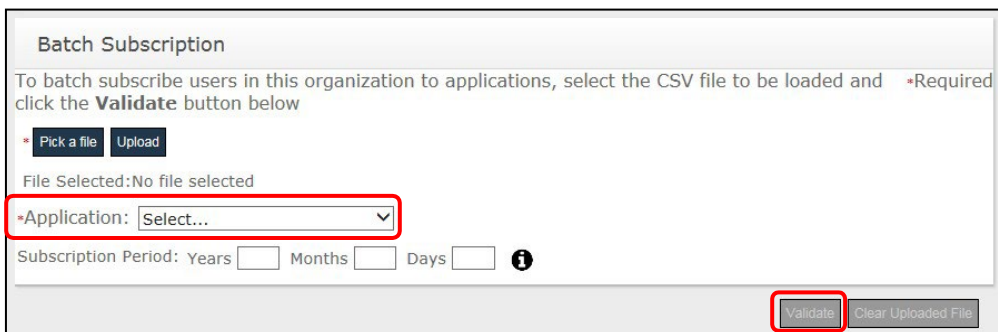
1. Access the **Administration** tab. Click the **Batch Subscription** link.



2. Click **Pick a file** to locate the correct file (see **Appendices A through D** for file formatting requirements). Click **Upload** to upload the file.



3. Select the application. Click **Validate** to proceed.



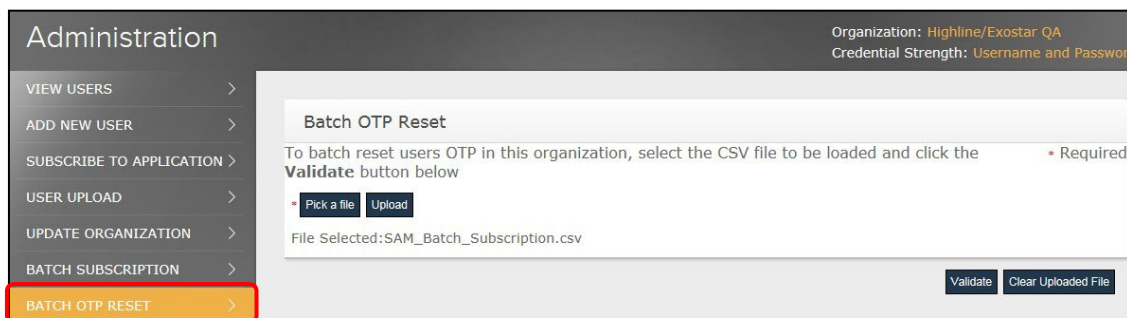
4. A confirmation message will display. Click **Commit** to load user subscriptions.

**NOTE:** Users with the green checkmark next to their name are granted access. If any users are listed with the red X mark, it means they were not processed due to errors. Review the list of errors and correct them to complete the upload.

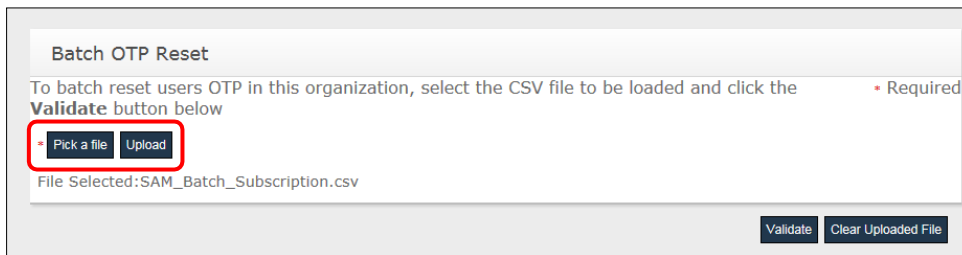
## How to Reset Inactive Accounts – Batch Reset

If there are multiple users who are inactive and activation emails need to be resent to them, Org Admins can reset their OTP accounts by using the **Batch OTP Reset** function. Admins simply have to upload a .csv file with user IDs to reset the inactive accounts in bulk. Follow the steps below to complete this action:

1. Access the **Administration** Tab. Click the **Batch OTP Resets** link.



2. Click **Pick a file** to locate the file containing user information (see **Appendices A through D** for the file formatting information). Click **Upload** to upload the file.



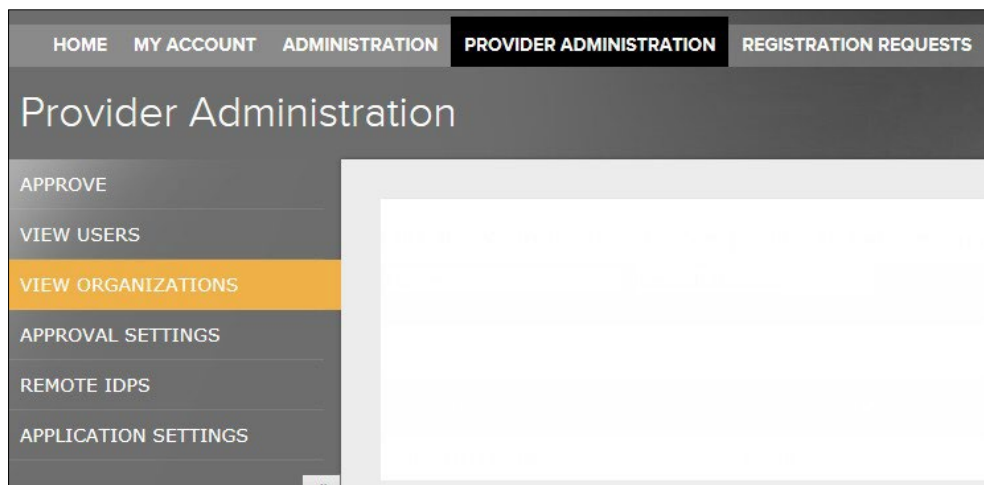
**NOTE:** The .scv file for **Batch OTP Reset** contains two columns: userID and subscriptionPeriod (optional). The userID field can contain either email address or Exostar SAM Platform User ID.

	A	B	C
1	userID	subscriptionPeriod	
2			
3			
4			

3. Click **Validate** to proceed.
4. A confirmation message will display. Click **Commit** to complete the reset.

## The Provider Administration Tab - Service Provider Administrators

Service Provider Administrators (SP Admins) can access the **Provider Administration** tab in order to approve and provision users and organizations with specific applications. Often referred to as application owners, the SP Admins manage access to the applications that they administer.



The **Provider Administration** tab contains the following options:

- **Approve:** displays the list of all users awaiting approval for access to the application.
- **View Users:** allows the SP Admin to search for users subscribed to the application.
- **View Organizations:** allows the SP Admin to search for organizations subscribed to the application.
- **Approval Settings:** allows the SP Admin to add to the list of organizations whose users do not require your approval for access to the application.
- **Application Settings:** allows the SP Admin to view applications, view application settings, and enter allowable email addresses and domains for application access.

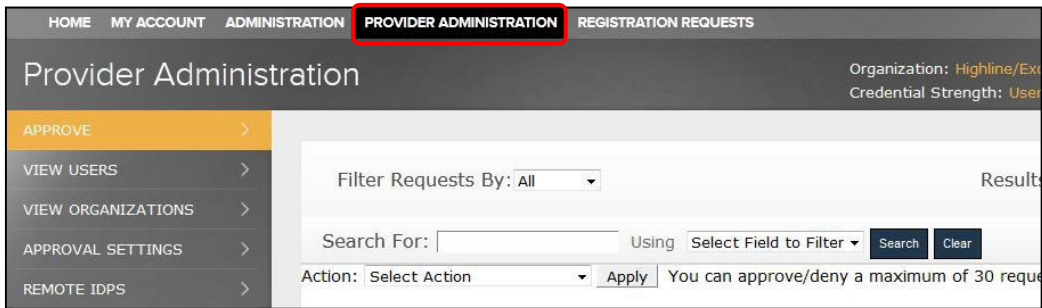
### [Approve: Approving User Access Requests](#)

Working in the **Approve** page, SP Admins may perform the following functions:

- Filter and search for users
- Approve or deny individual requests
- Approve or deny requests in multiples

## How to Filter and Search for Users

1. Login to the Exostar SAM Platform and access the **Provider Administration** tab.

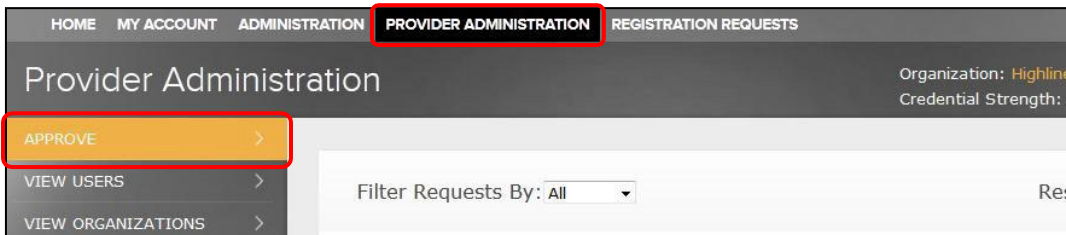


2. Use the search filters and fields to locate a specific approval request.  
The following search filter fields are available:
  - **Filter Request By:** allows you to filter by All, New, and Pending requests.
  - **Search For:** allows you to enter search criteria, such as username, user ID, or organization information.
3. Enter search criteria and click **Search**. The search results will display. Click the **Request ID** link to access the desired request.

## How to Process User Access Requests

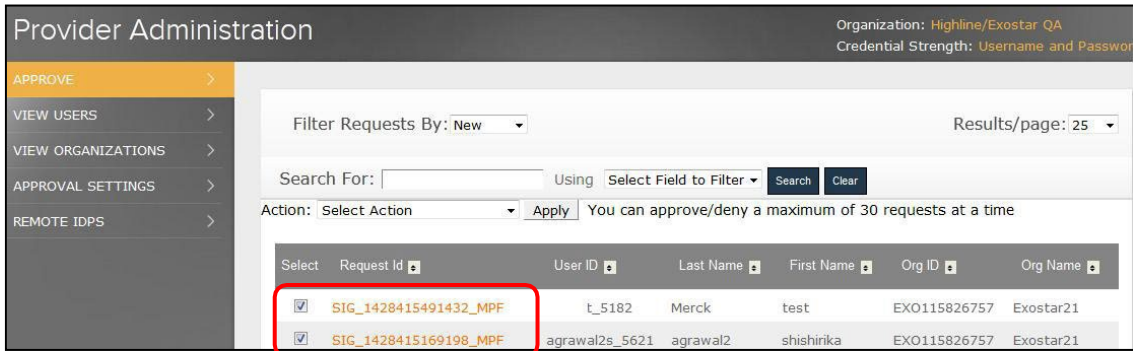
SP Admins can process user access requests individually (one by one), or multiple requests simultaneously. To process user access requests:

1. Login to the Exostar SAM Platform and access the **Provider Administration** tab.
2. To approve or deny an individual access request, select the desired request by clicking the **Request Id** link.

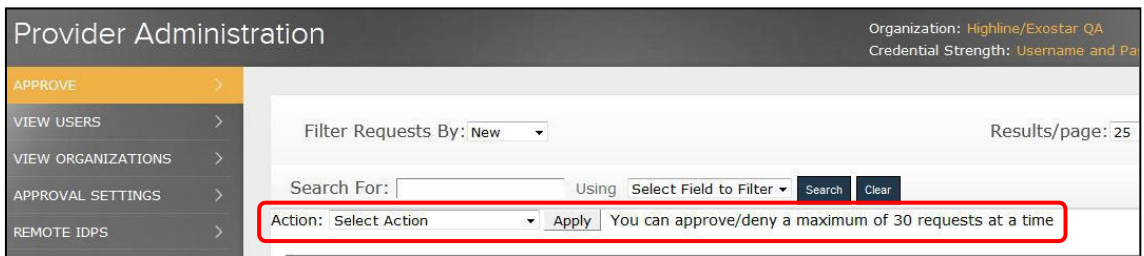




To approve or deny multiple requests, select the desired requests by placing a checkmark in the box next to the **Request ID** link.

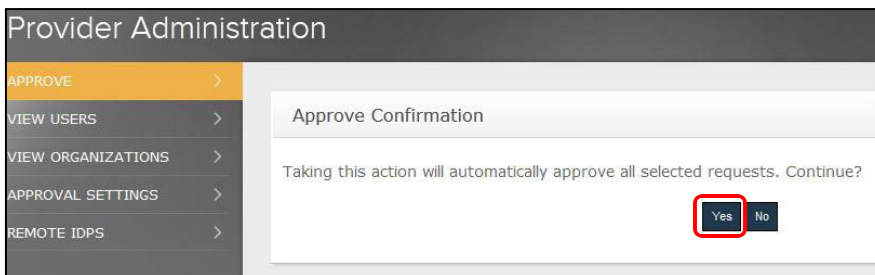


3. Select the desired **Action**.



**NOTE:** In order to **Approve** a user request, the user's account must be properly provisioned, and the user must have the minimum required role/privileges.

4. Then click **Yes** to approve your changes. Next, a confirmation message will display, and the user(s) will receive an email advising of approval.



## [View Users: Locate and Update User Accounts](#)

Using the **View Users** page, SP Admin may perform the following functions:

- Search for user accounts.
- View user account details, including Exostar SAM status and active and pending applications.
- Suspend and restore a user's application access.



The SP Admin can search for a user subscribed to an application on the **View Users** page. This page lists all Active, Inactive, or Pending users.

## Column Customization

Columns that display are customizable. You can set your preferences for visible columns. Please see the [Column Customization](#) section for instructions.

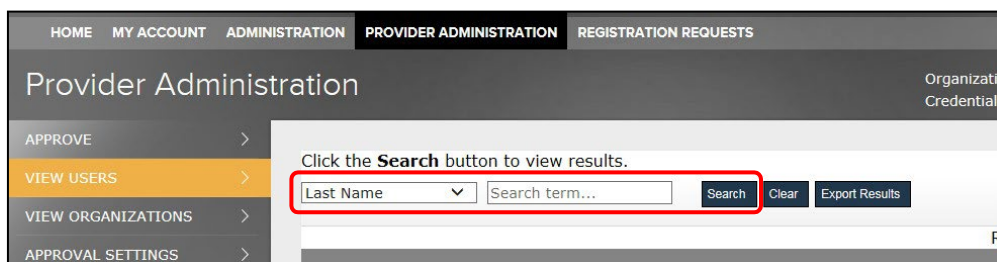
## How to Locate a User Account

You can perform searches by using search criteria and filters. Once you locate a user, you may view and update their user profile, their user role, and the applications they have access to via the **User Details** page. A user's details page contains two sections:

- **User Profile:** you can view the details of the individual's profile.
- **Application Settings:** you can view a user role and update application access.

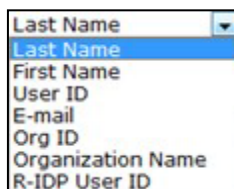
To locate a user:

1. Login to the Exostar SAM Platform, and access the **Provider Administration** tab.
2. Click the **View Users** link.



3. Enter search criteria.

**NOTE:** You may search for a user based on the following filter criteria:



4. To access the User Profile, **click on the User ID** link. The **User Profile** section contains all user information, including account and contact information.

**NOTE:** There are two active links contained within each search result entry:

1. Click the **USER ID** link to view the profile for this particular user.
2. Click the **ORG ID** link to view the Organizational Details for this user.

## How to Reset User's Permanent Password and Security Questions

1. Locate the user and access the profile page (as detailed above).
2. The Provider Admin can **Reset Permanent Password** and **Reset Security Question**.
  - To reset the user's permanent password, click **Reset Permanent Password**.
  - Click **Reset Security Question** to reset the user's security question.



3. The user will receive an email with instructions on how to reset the permanent password and security questions.

**NOTE:** Please be advised that once a user becomes a **Shared User**, Sponsor Managed Org admins and MPAs will be unable to reset their permanent password or security questions.

## How to Suspend a User Subscription

There are times when a user may no longer need access to an application or resource, perhaps temporarily. However, the user will still need to maintain an active account within SAM. The SP Admins may modify the user status in order to suspend access to a specific resource.

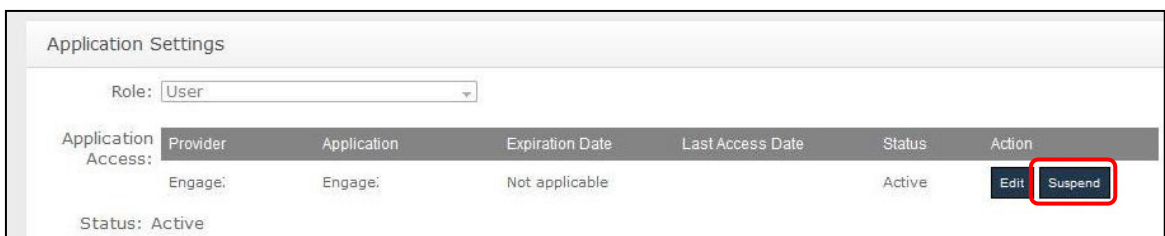
To suspend a user account subscription:

1. Login to Exostar SAM Platform, and access the **Provider Administration** tab.
2. Locate the desired user. Click the **User ID** link.

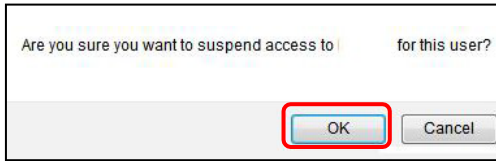


User ID	Last Name	First Name	Email	R-IDP ID	Org ID	Organization Name
testert_2281	Tester	Tracy	tracytester@exostar.com	EXO114766233	Highline/Exostar QA	U
testers_9179	Tester	Susie	stester@exostar.com	EXO114766233	Highline/Exostar QA	Us

3. The user's profile will display. Scroll to the bottom to locate the **Application Settings** section. Click **Suspend** next to the desired application.



4. A confirmation message will display. Click **OK** to suspend the user's access.



5. The user's account updates and their access to this application is now suspended. An updated status for the user will display.

**NOTE:** Please be advised that once a user becomes a **Shared User**, Sponsor Managed Org admins and MPAs will be unable to suspend non-sponsored applications

### How to Reactivate a User's Subscription

SP Admins can reactivate a user's access to an application. To reactivate a user account subscription:

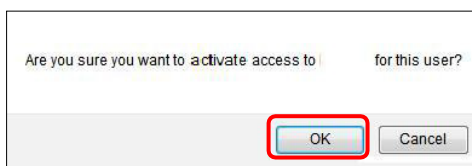
1. Login to Exostar SAM Platform and access the **Provider Administration** tab.
2. Locate the desired user. Click the **User ID** link.

User ID	Last Name	First Name	Email	R-IDP ID	Org ID	Organization Name
testert_2281	Tester	Tracy	tracytester@exostar.com	EXO114766233	Highline/Exostar QA	Us
testers_9179	Tester	Susie	stester@exostar.com	EXO114766233	Highline/Exostar QA	Us

3. The user's profile will display. Scroll to the bottom to locate the **Application Settings** section. Click **Activate** next to the desired application.



4. A confirmation message will display. Click **OK**.



**NOTE:** Once a user becomes a **Shared User**, Sponsor Managed Org Admins and MPAs will be unable to reactivate subscriptions to non-sponsored applications. However, SP Administrators can suspend, un-suspend or edit application access.

## How to Reset User's Permanent Password

SP Admins can reset an active user's permanent password. To reset a user's permanent password:

1. Login to Exostar SAM Platform and access the **Provider Administration** tab.
2. Locate the desired user and click the **User ID** link.



User ID	Last Name	First Name	Email	R-IDP ID	Org ID	Organization Name
testert_2281	Tester	Tracy	tracytester@exostar.com		EXO114766233	Highline/Exostar QA
testers_9179	Tester	Susie	stester@exostar.com		EXO114766233	Highline/Exostar QA

3. The user's profile will display. Scroll to the bottom to locate in the **Application Settings** section. Click **Reset Permanent Password**.



Application Access:	Provider	Application	Expiration Date	Last Access Date	Status
	EngageZone	EngageZone.msdc.com			Active

Status: Active **Reset Permanent Password** Reset Security Question

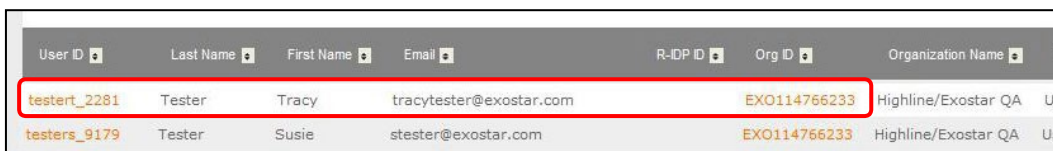
4. A confirmation message will display, and an email will be sent to the user's email address. The email will contain a system-generated password.

**NOTE:** Once a user becomes a **Shared User**, Sponsor Managed Org admins and MPAs will be unable to reset their permanent password. However, SP Administrators can reset permanent passwords or resend activation email.

## How to Resend Activation Email

SP Admins can resend the activation email to an inactive user. To resend the activation email:

1. Login to Exostar SAM Platform and access the **Provider Administration** tab.
2. Locate the desired user and click **User ID** link.



User ID	Last Name	First Name	Email	R-IDP ID	Org ID	Organization Name
testert_2281	Tester	Tracy	tracytester@exostar.com		EXO114766233	Highline/Exostar QA
testers_9179	Tester	Susie	stester@exostar.com		EXO114766233	Highline/Exostar QA

3. The user's profile will display. Scroll to the bottom to locate in the **Application Settings** section. Click **Resend Activation Email**.

Application Access:	Provider	Application	Expiration Date	Last Access Date	Status	Action
	EngageZone	EngageZone.msdc.com			Active	<a href="#">Edit</a> <a href="#">Suspend</a>
	Exostar LLC	Secure Share			Pending Acceptance of Terms & Conditions	

Status: User Inactive [Resend Activation E-mail](#)

4. A confirmation message will display.

## How to Resend User's Provisioning Record

SP Admins can reset an active user's provisioning record. To reset a user's provisioning record:

1. Login to Exostar SAM Platform and access the **Provider Administration** tab.
2. Locate the desired user and click the **User ID** link.

User ID	Last Name	First Name	Email	R-IDP ID	Org ID	Organization Name
<a href="#">testert_2281</a>	Tester	Tracy	tracytester@exostar.com		EXO114766233	Highline/Exostar QA
<a href="#">testers_9179</a>	Tester	Susie	stester@exostar.com		EXO114766233	Highline/Exostar QA

3. The user's profile will display. Scroll to the bottom of the page to locate the **Provisioning Settings** section. Select the Application from the drop-down menu. Then click **Resend** or **Force Resend** provisioning record.

Provisioning									
Provisioning Records:	Service Provider	In Queue	Queued Time	Last Completed Time	Fail Count	Retry After	On Hold	Last Error Code	Last Error Detail
	EngageZone.msdc.com	No	NA	03 Nov 2020 03:23 PM EST		NA	No		

Select an application:  [Resend](#) [Force Resend](#)

Once you have resent the provisioning record, it will display the time and date it was resent.

Provisioning									
Provisioning Records:	Service Provider	In Queue	Queued Time	Last Completed Time	Fail Count	Retry After	On Hold	Last Error Code	Last Error Detail
	EngageZone.msdc.com	No	NA	03 Nov 2020 03:23 PM EST		NA	No		

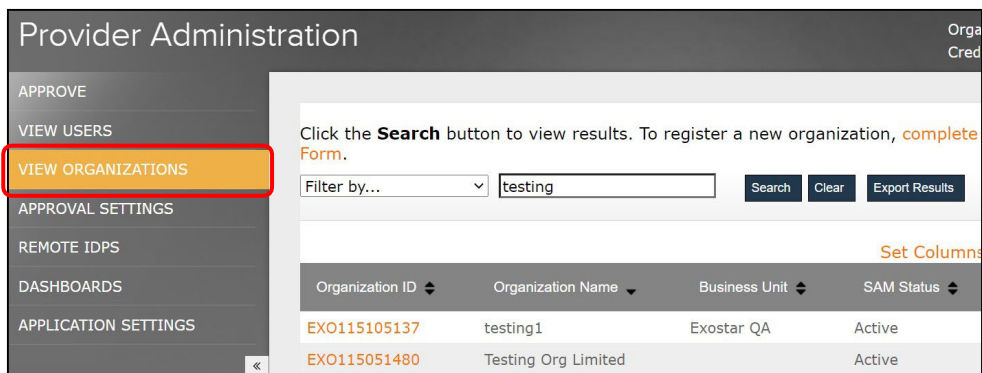
## View Organizations

The View Organizations page provides SP Admins with the ability to view and action organizations subscribed to their application. Administrators can also suspend and reactive organizational access to the resource. SP Admins can perform the following actions:

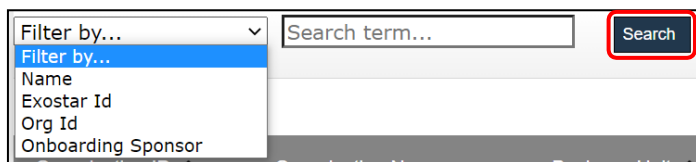
- Search for an Organization
- View Organization details, including Active Applications
- Suspend and Restore an Organization’s application access

## How to Locate an Organization

1. Login to the Exostar SAM Platform and access the **Provider Administration** tab.
2. Click the **View Organizations** link.



3. From the drop-down list, select the **Filter by** option. Or enter a **Search Term** in the dedicated field. Then click **Search**.



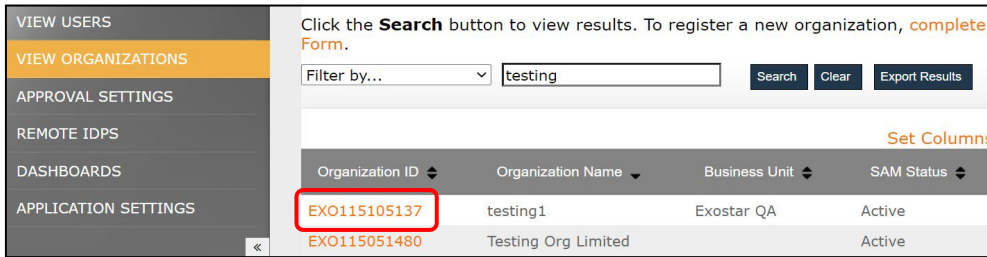
**NOTE:** If you leave the search criteria field blank, the full list of organizations will display.

4. The list of search results will display. Click the **Organization ID** to view all organizational information, contacts, and administrators.

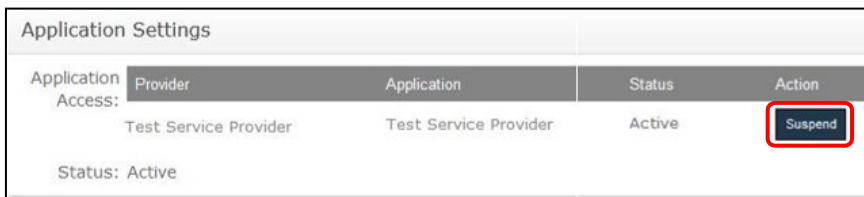
## Suspend an Organization’s Access

SP Admins can suspend an organization’s access to the application. If an organization’s access to a specific resource is suspended, the users from that organization will no longer have access to the resource.

1. Locate the organization for which you would like to suspend access. Click the **Org ID** for this organization.



2. Scroll to the bottom of the Organization's profile page. Click **Suspend**.



3. You will be prompted to confirm the **Suspension**. Then click **OK**.

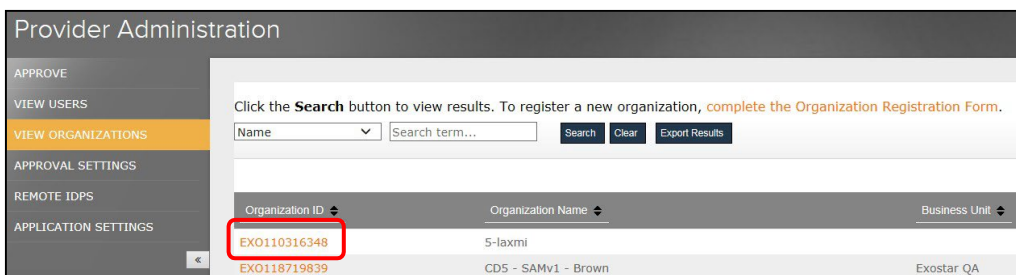


4. The confirmation message will display.

## Reactivate an Organization's Access

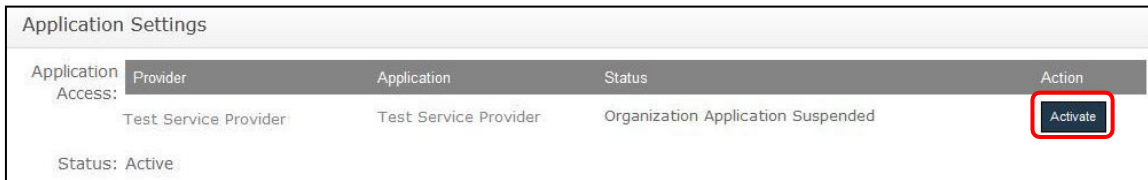
SP Admins can reactivate an organization's access to the application. To reactive access:

1. Search for and find the organization you want to reactive access. Click the **Org ID** for the applicable organization.





2. Scroll to the bottom of the profile to the **Application Settings** section and click **Activate**.



3. You are prompted to confirm the **Activation**. Click **OK**.



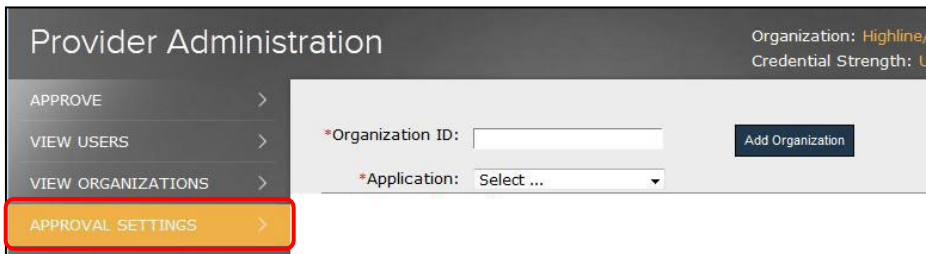
4. The confirmation message will display.

## Approval Settings

The Approval Settings page allows SP Admins to set automatic approvals for all users from a given organization. For example, if an organization is included in the 'approved list,' the users will not need to be approved by an SP Admin.

## How to Add an Organization to the Approved List

1. Login to Exostar SAM Platform, and access the **Provider Administration** tab.
2. Click the **Approval Setting** link.



3. To add an organization to the approved list, enter the Organization ID. Select the application you would like to add the Organization to the approved list. Click **Add Organization**.



**Add Setting**

\*Organization ID:

\*Application:

4. The page will refresh, now showing the organization on the approved list.

**Note:** You may add as many organizations as you wish to the approval list for each application.

## How to Remove an Organization from the Approved List

SP Admins can also remove an organization from the approved list.

1. Login to the Exostar SAM Platform and access the **Provider Administration** tab.
2. Click the **Approval Setting** link.
3. Use the search fields to locate the desired organization.
4. Click the **Remove** link to remove of an organization from the approved list.

Provider Administration

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

\*Organization ID:

\*Application:

Org ID	Org Name	Application	Added By	Added On	
exostar	Exostar LLC	Test Service Provider		04-02-2015	<input type="button" value="Remove"/>

## Application Settings

The Application Settings page allows SP Admins to view listed applications and determine if **Email Verification (Email OTP)** and **Email Restriction** is turned ON or OFF. Email Verification (Email OTP) and Email Restriction can only be set by Exostar. When the setting displays **True**, the setting is turned ON. When the setting displays **False**, the setting is turned OFF.

Provider Administration

Provider Name	Application Name	Email Verification	Email Restriction
Exostar LLC	File Based Test SP	true	false

## Email Verification for Applications

When **Email Verification (Email One Time Password [OTP])** is turned on for an application, users are required to enter a One-Time Password (OTP) code to access an application. Users will receive an email with an OTP code that is required to access the application.

Without the code, users will be unable to access the application. Email OTP is a multi-factor authentication, separate from other security credentials such as Phone OTP, Hardware OTP, or Exostar Mobile ID. Email OTP is used in addition to these security credentials. If using a security credential, you will be asked to enter the additional OTP code for applications that require Email OTP.

### Turn On Email Verification for an Application:

1. Contact SAM Support to submit the request.
2. Once Email OTP is turned ON, users will be required to enter an OTP code to access their application.

### Turn Off or Turn On Email Verification for an Application:

1. Contact SAM Support to submit your request.
2. Once Email OTP is turned OFF, users will no longer be required to enter an OTP code to access their application.

For instructions on how to access applications when Email Verification is turned ON, please review the Exostar SAM Platform User Guide.

## Email Restriction for Applications

If **Email Restriction** is turned ON for an application, SP Administrators can add specific emails (for existing SAM users) and specific domains (for instance, company.com) to allow these users access specific applications. Users, whose email addresses, and domains are not listed here, will not be able to access applications. To add approved email domains and addresses:

1. Open an Exostar online support case requesting to turn on **Email Restriction** for the application. You are notified once the request is completed.
2. From the **Provider Administration** tab, click **Application Settings**.
3. Click the **Application Name** you are adding email restriction to.

HOME	MY ACCOUNT	ADMINISTRATION	PROVIDER ADMINISTRATION	REGISTRATION REQUESTS	CUSTOMER SUPPORT	ADOPTION
Provider Administration						
APPROVE	Provider Name		Application Name	Email Verification	Email Restriction	
VIEW USERS	Exostar LLC		File Based Test SP	true	false	
VIEW ORGANIZATIONS						

4. Enter allowed email domains and/or address in the **Allowed Email Domains and Address field** (for instance, yahoo.com or [firstname.lastname@domain.com](mailto:firstname.lastname@domain.com)). You can enter both domain and email address simultaneously. Please use commas to separate information.

**Edit Service Provider**

Application Name: File Based Test SP

Email Verification: On If Email Verification is On, the user would be required to receive a One Time Password (OTP) in the email address registered with SAM and verify the same before being able to access this application.

Email Restriction: On If Email Restriction is On, the system would be required to verify that the user's email address registered with SAM is included in the list of allowable email domains / email addresses for this application, before the user can navigate further

Allowed Email Domains and Addresses: @hotmail.com;davida.evans@exostar.com

**NOTE:** You will be unable to edit an existing email address for an active user. You will need to enter the modified email addresses or domains as new.

5. Scroll to the bottom of the page and click **Submit**. You will receive a success message.

**Edit Service Provider**

You've successfully changed this service providers's information (File Based Test SP).Please click the link below to go back to the Service Provider profile

[Return to Service Provider Profile](#)

6. Email addresses or domains that are included in the list will be able to access the application. Allowable email addresses and domains will display in the **Allowable Email Domains** column. You can also view the complete list by clicking the **Application Name**.

Application Name	Email Verification	Email Restriction	Allowable Email Domains
File Based Test SP	true	true	yahoo.com,davida.evans@exostar.com

7. Email addresses or domains that have not been included will receive an error message when trying to access the application.

Error:Email Address or Domain Name not allowed for your application. Please update your profile with Email Address or Domain Name that is allowed and try again.

## The Registration Requests Tab – Organization and Application Administrators

The **Registration Requests** tab lists all pending user requests, including registration requests from new users or requests for access to applications.

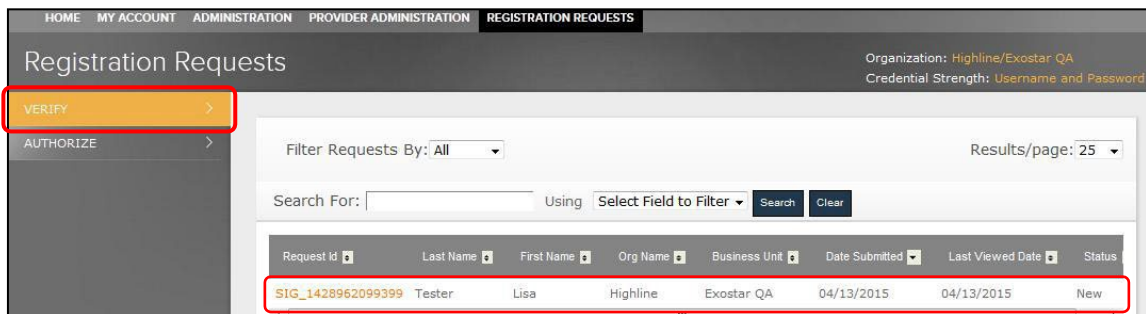
1. The **Verify** link will display the list of all self-registered users who are pending Exostar's approval for access to SAM. The Org Admin is responsible for handling these requests.
2. The **Authorize** link will display the list of users who were approved to access SAM but are still waiting for the approval to access their applications. The Application Administrator is responsible for approving these requests. By default, the Application Administrator role is disabled for most applications.

**NOTE:** The links available may depend upon your admin role. For example, the Org Admin role will not show the Authorize link.

## User Access Approvals (Verify Link)

An Organization Administrator will receive email notifications for pending user requests. After verifying user's registration and employment status, follow the steps below to approve self-registered users:

1. Login to Exostar SAM Platform as an Org Admin and navigate to the **Registration Requests** tab. Access the **Verify** link to view the list of pending requests.
2. Click the **Request Id** link for the request you would like to approve.



The screenshot shows the 'Registration Requests' page in the Exostar SAM Platform. The navigation bar includes 'HOME', 'MY ACCOUNT', 'ADMINISTRATION', 'PROVIDER ADMINISTRATION', and 'REGISTRATION REQUESTS'. The page title is 'Registration Requests'. On the left, there are two buttons: 'VERIFY' (highlighted in a red box) and 'AUTHORIZE'. The main content area includes a filter dropdown set to 'All', a search bar, and a table of requests. The table has columns for Request Id, Last Name, First Name, Org Name, Business Unit, Date Submitted, Last Viewed Date, and Status. The first row is highlighted in a red box.

Request Id	Last Name	First Name	Org Name	Business Unit	Date Submitted	Last Viewed Date	Status
SIG_1428962099399	Tester	Lisa	Highline	Exostar QA	04/13/2015	04/13/2015	New

3. Review the **User Registration Request** information, including the **Products & Services** access request. Click **Next**.

The screenshot shows the 'User Registration Request' form. It is divided into three main sections: 'Organization Information', 'Personal Information', and 'Products & Services'.  
- **Organization Information:** Organization Name: Highline, Business Unit: Exostar QA, Organization ID: EXO114766233.  
- **Personal Information:** Radio buttons for 'Select User' and 'Other' (selected). 'Onboarding Sponsor' is set to 'General'. Fields include Title (Select...), First Name (Lisa), Middle Name, Last Name (Tester), Suffix, Sponsor Email Address, Job Title, Phone (7035551234), Fax, Email (ltester@exostar.com), Confirm Email Address (ltester@exostar.com), Address 1 (123 Main Street), Address 2, City (Herndon), State/Province (VA), Zip/Postal Code (20176), Country (UNITED STATES), and Timezone (America/New\_York).  
- **Products & Services:** A checkbox for 'Test Service Provider' is checked.  
At the bottom right, there are 'Cancel' and 'Next >>' buttons, with the 'Next >>' button highlighted by a red box.

4. Complete all required fields and click **Next**.

The screenshot shows the 'Organization Administrator Review' section of the 'User Registration Request' form. It includes:  
- Organization Name: Highline  
- 'Is this individual an employee of the above-named organization?': Yes (dropdown)  
- 'Have you verified this individual's employment credentials?': Yes (dropdown)  
- 'Org Admin General Comments on this Request': A large text area.  
- 'Action': Approve (dropdown)  
At the bottom right, there are 'Cancel', '<< Back', and 'Next >>' buttons, with the 'Next >>' button highlighted by a red box.

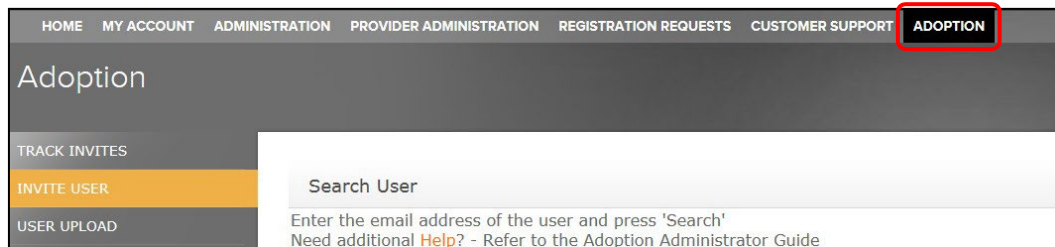
**NOTE:** If you select **Deny**, you will be required to enter **Comments** to explain your reasons for denial.

5. The **Confirmation** page will display, confirming the user's active SAM status.

## The Adoption Tab – Adoption Administrators

The Adoption Module allows you to invite external companies and external or internal users to use Exostar’s Secure Access Manager (SAM). In addition, the Adoption Module allows you to subscribe companies or users to applications or services.

**NOTE:** You **MUST** have the Adoption Administrator role to gain access to the adoption module, and this role is granted by Exostar. If during the invitation process you do not see the application or service you are inviting the user or company to, reach out to your Exostar Contact to modify the settings for your account.



From the Adoption Module, select one of the following workflow options:

- **Track Invites:** allows you to search existing invitations or continue to save invitations.
- **Invite User:** allows you to begin a new invitation for a user or new company.

### Invitation Process Overview:

- **Step 1:** Search for the user you would like to invite. If the user exists in the systems, invite the user to the application.
- **Step 2:** If the user is not found, search for the User’s organization name and other information, such as address and Exostar ID.
- **Step 3:** If you locate the organization, proceed with inviting the user. If you cannot locate the organization, invite the organization and user.

### Search for a User

To begin the invitation process, you **MUST** first search for the user to ensure the user was not already invited to the applications. To search for a user, you need the user’s RFC822 compliant email address. To search for a user:

1. Login to Exostar SAM Platform and access the **Adoption** tab.
2. Click the **Invite User** link.
3. Enter the user’s email address and click **Search**.

TRACK INVITES >

**INVITE USER** >

### Search User

Enter the email address of the user and press 'Search'  
Need additional [Help?](#) - Refer to the Adoption Administrator Guide

\* Email Address :

Last Name :

First Name :

4. Once the user search is complete, proceed as follows:
  - If the user is found in our system, proceed with [inviting the user to the application](#).
  - If the user is not found in our system, continue with [searching for the organization](#). If the organization is found in the system, add the user to the organization.
  - If the user and the organization are not found in the system, proceed [with adding both the organization and the user](#).

## Invite an Existing User

1. Always begin by [searching for the user](#) in the system.
2. Once you searched for and located the user, the search results will show the user's name, Organization information, Exostar SAM Platform account status, and active and pending applications.

Search User

Enter the email address of the user and press 'Search'  
Need additional [Help?](#) - Refer to the Adoption Administrator Guide

\* Email Address :

Last Name :

First Name :

Results per page: 10

#### User Search Results

Last Name	First Name	Organization Name	Business Unit	Organization ID	SAM Status	Active Applications
Wick	Ryan	Ryan Test Org		DX0110500802	Active	EngegeZone.msd.com

3. Select the user account by clicking on the **Last Name** link.

#### User Search Results

Last Name	First Name	Organization Name	Business Unit
Wick	Ryan	Ryan Test Org	

- The user's profile page will display. Place a check next to the applications you would like to subscribe the user to. Click **Subscribe to Application(s)**.

Select	Application Name
<input type="checkbox"/>	SecureShare

- The invitation information will display. You can designate a **Subscription Period**, if desired, which enforces a duration period for the account. Click **Submit**.

Invitation Information

Click 'Submit' to issue the invitation for the application(s) listed and take the following additional action(s):

Full Name : Ryan Wick  
Email Address : ryan.wick2@exostar.com  
Organization Name: Ryan Test Org  
Organization ID: EXO118568832  
Message to User :

Application Information

Subscribe User to Application	Subscription Period
SecureShare	Years <input type="text"/> Months <input type="text"/> Days <input type="text"/>

- The users will receive a confirmation email.

## Add User to an Existing Organization

- Always begin by [searching for the user](#) in the system.  
If you conducted a search but were unable to locate the user, you should then search for the organization.
- On the search results pages, click **Search Organization**.

Search User

Enter the email address of the user and press 'Search'  
Need additional [Help?](#) - Refer to the Adoption Administrator Guide

\* Email Address :   
Last Name :   
First Name :

Results per page: 10

User Search Results

No matches found



- Enter the organization information. You can enter the name, Exostar ID, address, etc. Click **Search**.

**Organization Search**

In an effort to avoid duplication you should only proceed with creating a new organization if you are certain that the organization does not already exist. Use more than one search criterion to narrow down your results. Need additional [Help?](#) - Refer to the Adoption Administrator Guide

Organization Name : <input type="text" value="exostar-3"/>	Address 2 : <input type="text"/>
Exostar ID : <input type="text"/>	City : <input type="text"/>
DUNS Number : <input type="text"/>	Country : <input type="text" value="Select..."/>
US Federal Tax ID Number : <input type="text"/>	State/Province : <input type="text"/>
Address 1 : <input type="text"/>	Postal/Zip Code : <input type="text"/>

Results per page:

- The search results may include one or more organization accounts. If multiple organizations display, select the organization by clicking the **Organization Name**.

**Organization Search Results**

Please review the search results carefully. In an effort to avoid duplication you should only proceed with creating a new organization if you are certain that the organization does not already exist. To add user to existing organization click on organization name link.

Organization Name	Organization ID	Exostar ID	SAM Status
exostar-3	EXO117897139	117897139	ACTIVE

- Select **Add User to Organization**.

**Organization Search Results**

Please review the search results carefully. In an effort to avoid duplication you should only proceed with creating a new organization if you are certain that the organization does not already exist. To add user to existing organization click on organization name link.

Organization Name	Organization ID	Exostar ID	SAM Status
exostar-3	EXO117897139	117897139	ACTIVE

[Add User to New Organization](#)

- Enter the user details and select the applications the user should subscribe to. **Optional:** You can enter a subscription period (optional), and a message to include in the email confirmation. Click **Submit Request**.

**User Details**

*On-boarding Sponsor : <input type="text" value="Select Tenant..."/>	*Address 1 : <input type="text"/>
Title : <input type="text" value="Select..."/>	Address 2 : <input type="text"/>
*First Name : <input type="text"/>	*City : <input type="text"/>
Middle Name : <input type="text"/>	*Country : <input type="text" value="Select..."/>
*Last Name : <input type="text"/>	*State/Province : <input type="text"/>
Suffix : <input type="text"/>	*Postal/Zip Code : <input type="text"/>
Job Title : <input type="text"/>	*Phone : <input type="text"/>
*Email Address : <input type="text" value="ryan.wick3@exostar.co"/>	Fax : <input type="text"/>
*Confirm Email Address : <input type="text" value="ryan.wick3@exostar.co"/>	TimeZone : <input type="text" value="Select..."/>

Organization Name: exostar-3  
 Business Unit :  
 Organization ID: EXO117897139  
 Exostar Id : 117897139

Select	Application Name	Subscription Period
<input type="checkbox"/>	SecureShare	Years <input type="text"/> Months <input type="text"/> Days <input type="text"/>

**Message**

Optionally, enter text to included in email notification to user

Message to New user:

7. Confirm the invitation information and click **Submit**.

**Invitation Information**

Click 'Submit' to issue the invitation for the application(s) listed and take the following additional action(s):

Full Name : Ryan Tester  
Email Address : ryan.wick3@exostar.com  
Organization Name: exostar-3  
Organization ID: EXO117897139  
Message to User : I've added you to SecureShare

**Application Information**

Subscribe User to Application	Subscription Period
SecureShare	Years <input type="text"/> Months <input type="text"/> Days <input type="text"/> ⓘ

8. A confirmation page displays, and the user will receive an email containing their registration information.

## Add a New Organization and User

1. Always begin by [searching for the user](#) in the system.
2. If you conducted a search but were unable to locate the user, you [then search for the organization](#).
3. If no organization matches are found, click **Add User to New Organization** to start the invitation process for both the Organization and the User.

Organization Search Results

No matches found

- Verify that no duplicate organizations exist by entering the Organization information and clicking **Check for Duplicates**.

**Organization Details**

Fill out organization details to first check for duplicate organizations, then if not a duplicate add user to new organization  
 All field marked with \* are required  
 Need Additional [Help?](#)-Refer to the Adoption Administrator Guide

\*On-boarding Sponsor :

\*Organization Name:

\*Address1 :

Address2 :

- If no duplicates are found, the page below will display. Verify the organization information.

**Organization Details**

Review Organization details, Add users, and click 'Submit Request' to complete  
 Select 'Back' button to edit organization details  
 Need Additional [Help?](#)-Refer to the Adoption Administrator Guide

On-boarding Sponsor : General                      Address1 : 123 street

Organization Name: Ryan Demo                      Address2 :

DUNS Number :    City : herndon

Country : US

State/Province : US-VA

Zip/Postal code : 20171

- Select the applications you would like to subscribe the organization to.

**Select Application**

Select the checkbox next to the applications the user should be subscribed to  
 At least one application must be selected

Select	Application Name
<input type="checkbox"/>	SecureShare

- Click **Add User**.

**Add User**

Click the email address to edit user's information  
 At least one user with one application must be entered

Email Address	Last Name	First Name	Application

8. Enter the user details. Click **Submit Request**.

*On-boarding Sponsor : General	*Address1 : 123 street
Title : Select...	Address2 :
*First Name : Ryan	*City : herndon
Middle Name :	*Country : UNITED STATES
*Last Name : Tester	*State/Province : Virginia
Suffix :	*Postal/Zip Code : 20171
Job Title :	*Phone : 555-555-5555
*Email Address : ryan.wick3@exostar.co	Fax :
*Confirm Email Address : ryan.wick3@exostar.co	TimeZone : US/Eastern
Organization Name : Ryan Demo	

9. Enter an optional message to include with the email notification to the user. Click **Submit Request**.

SecureShare Years  Months

Message

Optionally, enter text to included in email notification to user

Message to New user:

**Submit Request** Clear Cancel

Upon successfully submitting the request, the “Invitation Success” message will display. The user will receive an email invitation containing a registration link.

## User Upload

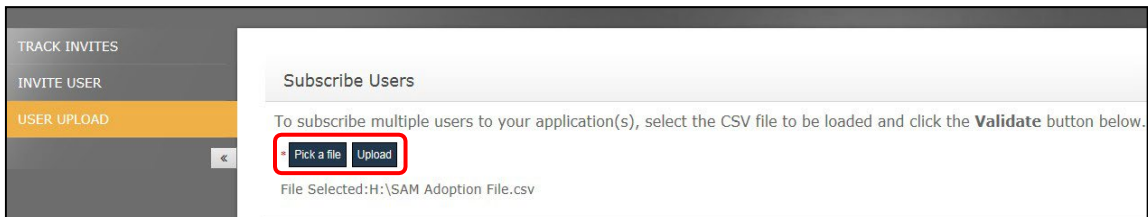
Adoption Administrators can subscribe multiple users from a single organization to one or more applications via a .csv file upload. If an Adoption Administrator subscribes users to applications that their organization is *not* subscribed to, the organization will be automatically subscribed to these applications after the fact of the upload. Before the users of an OMO (Organization Managed Organization) can access these applications, their Org Admin must accept Terms and Conditions for the applications. This requirement does not apply to SMOs (Sponsor-Managed Organizations).

**Bulk Upload allows Adoption Administrators to add:**

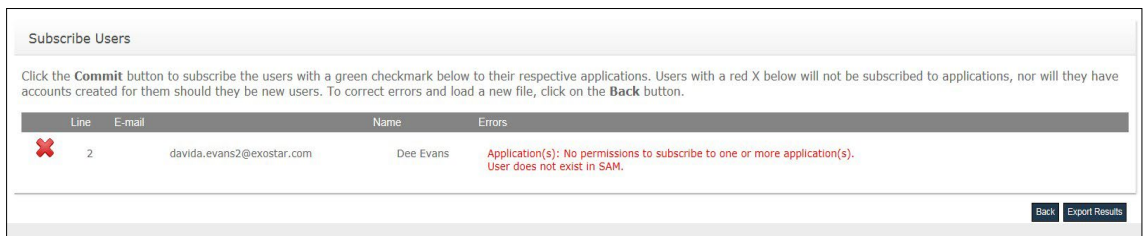
- New users to a new organization
- New users to an existing organization
- Existing users to a new organization
- Existing users to an existing organization

## To Complete Upload:

1. From the Adoption tab, click **User Upload**.
2. Complete the template. Please see [Appendix B – CSV File Requirements – User Uploads for Adoption Administrators](#) for template requirements.
3. Once the template is complete, save it as a .CSV file.
4. Click **Pick a file**, and then click **Upload**. The uploaded file name will display.

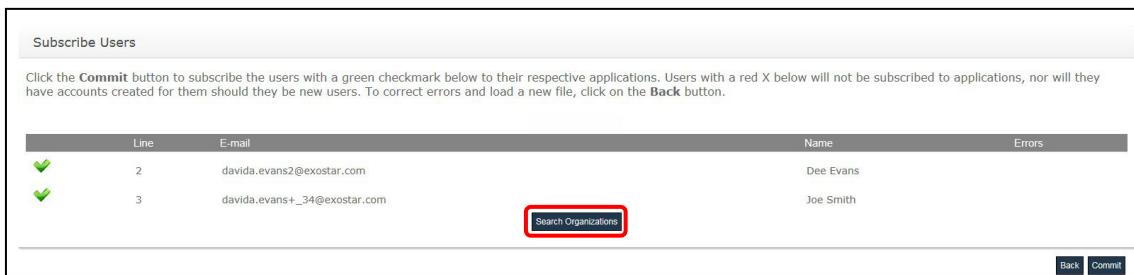


5. Click **Validate**. If the file contains errors, errors will display. You will need to correct the errors, and to re-upload the file.



**NOTE:** You can only subscribe users for applications that you are a SP Administrator for. If you attempt to subscribe them for an application that your organization is not subscribed to, you will receive an error message.

6. If there are no issues, you will receive a green check mark. Click **Search Organizations** to locate the organization that you are adding users to or create a new organization.



7. If you find the organization, click the **Organization Name** to add users to an existing organization. If the organization does not exist, click [Add User\(s\) to New Organization](#).

**Organization Search**

In an effort to avoid duplication you should only proceed with creating a new organization if you are certain that the organization does not already exist. Use more than one search criterion to narrow down your results. Need additional [Help?](#) - Refer to the Adoption Administrator Guide

Organization Name :  Address 2 :   
 Exostar ID :  City :   
 DUNS Number :  Country :   
 US Federal Tax ID Number :  State/Province :   
 Address 1 :  Postal/Zip Code :   
 Search Clear Cancel Results per page: 10

---

**Organization Search Results**

Please review the search results carefully. In an effort to avoid duplication you should only proceed with creating a new organization if you are certain that the organization does not already exist. To add user to existing organization click on organization name link.

Organization Name	Organization ID	Exostar ID	SAM Status	Active Applications	Pending Applications
<a href="#">Fulfillment_DCS</a>	EXO111823812	111823812	ACTIVE	EngageZone.msdc.com,TEST Service Provider 1,Digital Certificate Service,EngageZone Qualification	

[Add User\(s\) to New Organization](#)

8. In the new screen, click **Add Users to Organization**.

**Organization Details**

On-boarding Sponsor : General Address 1 : 13241 Woodland Park Dr.  
 Organization Name: Fulfillment\_DCS Address 2 :  
 Organization ID: EXO111823812 City : Herndon  
 Exostar ID : 111823812 Country : US  
 Business Unit : Exostar QA State/Province : VA  
 Organization's HQ/Country of Incorporation: US Zip/Postal Code : 20171  
 DUNS Number : R-IDP Status : Unlinked  
 SAM Status : ACTIVE

[Back](#) [Add User\(s\) to Organization](#)

9. Review the list of users and click **Commit to complete**.

**Subscribe Users**

Click the **Commit** button to subscribe the users with a green checkmark below to their respective applications. Users with a red X below will not be subscribed to applications, nor will they have accounts created for them should they be new users. To correct errors and load a new file, click on the **Back** button.

[Search Organizations](#)

Line	E-mail	Name	Errors
2	davida.evans2@exostar.com	Dee Evans	
3	davida.evans+_34@exostar.com	Joe Smith	

[Search Organizations](#)

[Back](#) [Commit](#)

10. Existing users are now subscribed to the application(s). New users will receive the activation email to activate their account.

11. If no matches are found after completing an organization search and you are certain that there are no duplicates, click **Add User(s) to New Organization**.

**Organization Search**

In an effort to avoid duplication you should only proceed with creating a new organization if you are certain that the organization does not already exist. Use more than one search criterion to narrow down your results. Need additional [Help?](#) - Refer to the Adoption Administrator Guide

Organization Name :  Address 2 :

Exostar ID :  City :

DUNS Number :  Country :

US Federal Tax ID Number :  State/Province :

Address 1 :  Postal/Zip Code :

Results per page:

---

Organization Search Results

No matches found

12. Select required fields (marked with an \*) and click **Check for Duplicates**.

**Organization Details**

Fill out organization details to first check for duplicate organizations, then if not a duplicate add user to new organization. All field marked with \* are required. Need Additional [Help?](#)-Refer to the Adoption Administrator Guide

\*On-boarding Sponsor :

\*Organization Name :

\*Address 1 :  Address 2 :

\*City :

\*Country :

\*State/Province :

Postal/Zip code :

DUNS Number :

13. If no duplicates are found, organization details will display. Click **Confirm**, and then click **Commit**. Existing users are now subscribed to the application(s). New users will receive the activation email to activate their account.

**NOTE:** If a match is found, click the organization name to add user to the organization. If this is not a duplicate, click **Ignore Duplicate and Request New Organization**. New users will receive the activation email to register their organization.

**Resolve Duplicates**

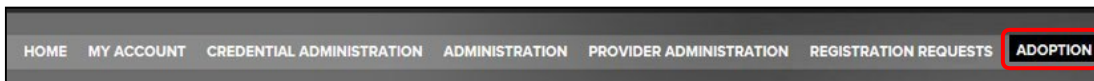
The system has found up to 1 potential duplicates for the organization you wish to create. Please review the list of duplicates carefully, click on organization name to view details. In an effort to avoid duplication, you should only proceed with creating a new organization if you are certain that the organization does not already exist. Need Additional [Help?](#) Refer to the Adoption Administrator Guide

Organization Name	Organization ID	Exostar ID	SAM Status	Active Applications
<input type="button" value="Fulfillment_DCS"/>	EXO111823812	111823812	ACTIVE	TEST Service Provider 1, Digital Certificate Service,

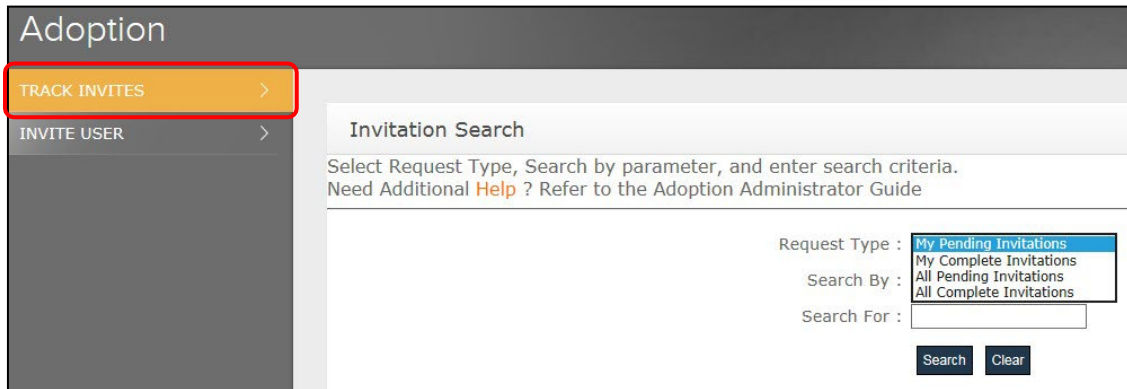
## How to Track Invitations

You can search for the previously sent invitations by using the **Track Invites** option.

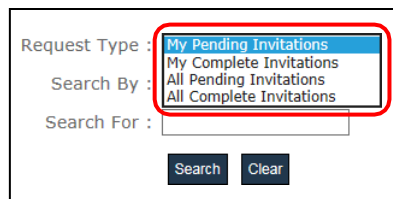
1. Log into the Exostar SAM Platform and access the **Adoption Module**.



2. Click the **Track Invites** link.



3. Select the desired **Request Type** from the dropdown menu. **Request Type** options include:



- **My Pending Invitations:** All unaccepted invitations issued by the Administrator.
- **My Complete Invitations:** All accepted invitations issued by the Administrator.
- **All Pending Invitations:** If there are multiple adoption administrators, then this will show all in-progress invitations.
- **All Complete invitations:** Accepted invitations by all adoption administrators.

4. Select the desired **Search By** criteria. Search criteria options include:

- Email Address of invitee
- First Name of Adoption Administrator
- Last Name of Adoption Administrator
- Date the request was issued
- Date the request was completed (not available for Pending requests)
- External Organization ID
- External User ID
- Exostar ID

**NOTE:** By default, only the invitations completed within the past 60 days will display. To search for older invitations, use the **Date Requested** or **Date Completed** search criteria.

5. Click **Search**.



- The search results will display. Click the **Request ID** link to obtain information about the request, including username, user ID, email address, organization information, adoption administrator who invited the user, dates submitted and completed, and the status of the invitation.

Invitation Search

Select Request Type, Search by parameter, and enter search criteria.  
Need Additional [Help](#) ? Refer to the [Adoption Administrator Guide](#)

Request Type :

Search By :

Start Date :

End Date :

Results per page:

---

Existing Invitations

Request ID	Invitee	Invitee Ref	Adoption Admin First Name	Adoption Admin Last Name
<a href="#">fe2c8d64-237d-43a5-9898-caca9c81a049</a>	test test	testt_1149@securepass.exostartest.com	Shared Investigator Platform	(SIP)

## ORGANIZATION REGISTRATION OVERVIEW

During the registration process, organizations provide their organization details and designate individuals to serve in administrative roles. Please note that these roles can be assigned to multiple or a single individual within your organization.

- Organization Administrator:** is responsible for creating and managing users in your organization, approving user self-registrations, and maintaining the vendor profile information.
- Company Contact:** can be the same person as your Organization Administrator or another person within the organization. The company contact is responsible for managing relations with Secure Access Manager (SAM) Platform partners.

### New Organization Registration

The registration of a new organization in SAM consists of three stages:

- Entering the Organization Information
- Subscribing to Products and Services
- Providing the Administrator(s) Information



To begin, enter your organization information:

1. Open your Internet Explorer browser and access the organization registration page via the following link <https://secureaccess.exostar.com/orgRegistration>.
2. Fill out the required information in the Organization Information section.

### Organization Information

\* Individual-Level Organization?

\* Onboarding Sponsor:

\* Organization Name:

Business Unit:

\* Organization's HQ/Country of Incorporation:

TaxID (US Only):

DUNS #:

Is your organization certified as a Small Disadvantaged Business in the SB PRO-Net Database? (US Only)  Yes  No

\* Address 1:

Address 2:

\* City:

\* Country:

\* State/Province:

Zip/Postal Code:

3. Fill out the required information in the Organization Administrator section.

### Organization Administrator

Title:

\* First Name:

Middle Name:

\* Last Name:

Suffix:

Sponsor E-mail Address:

Job Title:

\* Phone:

Fax:

\* E-mail:

\* Confirm E-mail Address:

\* Address 1:

Address 2:

\* City:

\* Country:

\* State/Province:

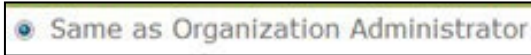
Zip/Postal Code:

\* Timezone:

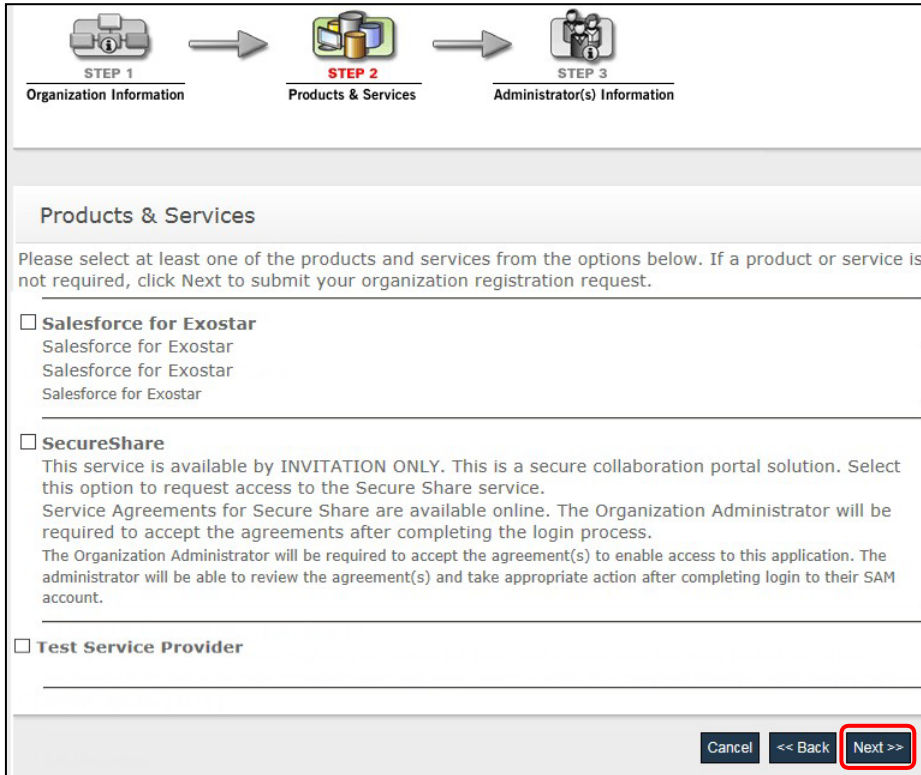
**NOTE:** User login instructions will be sent to the provided email address.

4. Complete the Company Contact information. Click **Next** to continue.

**NOTE:** If the Organization Administrator will also act as the Company Contact, select **Same as Organization Administrator**.



5. Select the desired product(s) from the list provided on the Products and Services page. Click **Next**.

A screenshot of a multi-step registration process. At the top, a progress bar shows three steps: "STEP 1 Organization Information", "STEP 2 Products & Services" (which is highlighted in red), and "STEP 3 Administrator(s) Information". Below the progress bar, the "Products & Services" section is titled. It contains a paragraph: "Please select at least one of the products and services from the options below. If a product or service is not required, click Next to submit your organization registration request." There are three checkboxes: "Salesforce for Exostar" (with sub-items), "SecureShare" (with detailed text), and "Test Service Provider". At the bottom right, there are three buttons: "Cancel", "<< Back", and "Next >>". The "Next >>" button is highlighted with a red border.

**NOTE:** Publicly available applications will display. If you need to access applications available by invitation only, please contact Exostar SAM Support to have applications added.

6. Designate the Application Administrator for each selected product. The Application Administrator will be responsible for managing and approving user access to their applications. However, for most applications the Application Administrator role is disabled by default.

The Application Administrator can be the same as the Organization Administrator.

Salesforce for Exostar Administrator

Salesforce for Exostar Administrator: Other

Title

\* First Name

Middle Name

\* Last Name

Suffix

Sponsor E-mail Address

Job Title

\* Phone

Fax

\* E-mail

\* Confirm E-mail Address

\* Address 1

Address 2

\* City

\* Country

\* State/Province

Zip/Postal Code

\* Timezone

Cancel << Back **Next >>**

7. If “Same as... (Organization Administrator)” is selected, the user information will be pre-populated. Click **Next** to complete the new organization registration.

If “Other” is selected, complete the required fields to designate the Administrator. Click **Next** to complete the new organization registration.

Test Service Provider Administrator

Other

Other

Same as Teresa Cambetas(Organization Administrator)

8. You will receive a **Submission Confirmation** page, containing the reference number for your registration request.

## Email Confirmations

Throughout the process of registration, you will be receiving email confirmations for the various steps of registration and approval. Depending on your administrative role, you will receive all or some of the below emails:

1. **Organization Registration – Submitted to Secure Access Manager:** You will receive this email immediately after submitting your registration request, along with the reference number for your record.
2. **Account Registration – Accepted in Secure Access Manager:** The Organization Administrator will receive this email when the organization's registration request is approved. This email will contain the important login information.
3. **Secure Access Manager Point of Contact – Organization Registration Approved:** The designated Point of Contact will receive this confirmation when the organization account is approved.

## Accept Terms and Conditions

Organization and Management & Portal Administrators will complete the Acceptance of Terms and Conditions for all subscribed applications. Follow the steps below to accept Terms and Conditions:

1. Login to the Exostar SAM Platform at <https://secureaccess.exostar.com>.
2. Navigate to the Home page. The **View Service Agreement** link will display next to the application(s). Click **View Service Agreement**.
3. After reviewing the Agreement, click **I Agree** to accept it. You will receive the Service Confirmation message:

You have successfully accepted the service agreement. You should receive an email shortly.

## NEXT STEPS

Once the Organization Registration has been completed, the Organization Administrator will be responsible for managing the organization's SAM users. Below is the list of tasks that are the responsibility of an Org Admin:

- Viewing and managing user accounts
- Adding new users
- Authorizing user access
- Deleting/suspending users
- Viewing organization details

- Subscribing organization to new applications

For more information on SAM, go to <https://www.myexostar.com/>

## APPENDIX A – CSV FILE REQUIREMENTS – USER UPLOADS

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
subscription	honorific	lastName	middleName	firstName	jobTitle	emailAdx	phoneNu	faxNum	streetAdx	streetAdx	city	postalCo	password	regionCode	country	applicati	adminAp	role	ridpUser	suffix	sponsor

Field	Cardinality/ Values	Response/Comments
Subscription Period	Optional	Acceptable Options: #y#t#d#h#m#s e.g., 1y = 1 Year, 1y1t = 1 year + 1 month Leaving this value blank will default to the Application Maximum Subscription Duration (if provided)
Honorific	Optional	Acceptable options: Mr., Mrs., Ms., Dr.
Last Name	Required Max 50 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Middle Name	Optional Max 50 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
First Name	Required Max 50 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Job Title	Optional Max 75 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Email Address	Required RFC822 compliant	Must be unique
Phone	Required Min 4 characters / Max 40 characters	Accepts only the following characters: Numbers, '-', '+', '.', '(', ')', 'e', 't', 'x' and embedded white spaces
Fax	Optional Min 4 characters / Max 40 characters	Accepts only the following characters: Numbers, '-', '+', '.', '(', ')', 'e', 't', 'x' and embedded white spaces
Street Address 1	Required Max 200 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Street Address 2	Optional Max 100 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
City	Required Max 52 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Zip/Postal Code	Optional Max 30 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
RegionCode	Required	Accepts letters, numbers, and printable special characters except for '<' or '>'.

<b>Country</b>	Required	Must be in the form of ISO 3166-1 Alpha-2 Code (i.e., United States = US)
<b>Applications</b>	Required	Multiple applications must be separated by a semicolon ‘;’ Organization must be subscribed to the listed application(s)
<b>Application Admin</b>	Optional	Multiple applications must be separated by a semicolon ‘;’ User will be assigned the application administrator role for application(s) listed in the column Organization must be subscribed to the application(s) listed
<b>Role</b>	Required	User or Admin User will be assigned the organization administrator role if ‘Admin’ is listed in the column
<b>R-IDP User ID</b>	Optional	R-IDP User ID must be unique for the associated R-IDP Organization must be associated to an R-IDP Note: For Merck, the R-IDP User ID and the ISID are the same thing.
<b>Suffix</b>	Optional	4 Char Limit
<b>Sponsor Email Address</b>	Optional RFC822 compliant	75 Char Limit

APPENDIX B – CSV FILE REQUIREMENTS – USER UPLOADS FOR ADOPTION ADMINISTRATORS

Field	Cardinality/ Values	Response/Comments
Last Name	Required Max 32 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Middle Name	Optional Max 32 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
First Name	Required Max 32 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Job Title	Optional Max 50 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Email Address	Required RFC822 compliant	Must be unique
Phone	Required Min 4 characters /Max 20 characters	Accepts only the following characters: Numbers, '-', '+', '.', '(', ')', 'e', 't', 'x' and embedded white spaces
Fax	Optional Min 4 characters / Max 20 characters	Accepts only the following characters: Numbers, '-', '+', '.', '(', ')', 'e', 't', 'x' and embedded white spaces
Street Address 1	Required Max 64 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Street Address 2	Optional Max 64 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
City	Required Max 52 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Zip/Postal Code	Required Max 16 characters	Accepts letters, numbers, and printable special characters except for '<' or '>'.
RegionCode	Required	Accepts letters, numbers, and printable special characters except for '<' or '>'.
Password	Required	
State or Province	Optional	
Country	Required	Must be in the form of ISO 3166-1 Alpha-2 Code (i.e., United States = US)
Applications	Required	Multiple applications must be separated by a semicolon ';' Organization must be subscribed to the listed application(s)
Application Admin	Optional	Multiple applications must be separated by a semicolon ';' User will be assigned the application administrator role for application(s) listed in the column Organization must be subscribed to the application(s) listed



<b>Role</b>	Required	User or Admin User will be assigned the organization administrator role if 'Admin' is listed in the column
<b>R-IDP User ID</b>	Optional	R-IDP User ID must be unique for the associated R-IDP Organization must be associated to an R-IDP Note: For Merck, the R-IDP User ID and the ISID are the same thing.
<b>Suffix</b>	Optional	4 Char Limit
<b>Sponsor</b>	Required	
<b>Honorific (Title such as Dr.)</b>	Optional	Acceptable options: Mr., Mrs., Ms., Dr.
<b>Subscription Period</b>	Optional	Acceptable Options: #y#t#d#h#m#s e.g., 1y = 1 Year, 1y1t = 1 year + 1 month Leaving this value blank will default to the Application Maximum Subscription Duration (if provided)

**APPENDIX C – CSV FILE REQUIREMENTS – BATCH SUBSCRIPTION**

	A	B	C
1	userID	subscriptionPeriod	
2			

Field	Cardinality/ Values	Response/Comments
User ID	Required	Accepts approved users with valid UserID
Subscription Period	Optional	Acceptable Options: #y#t#d#h#m#s e.g., 1y = 1 Year, 1y1t = 1 year + 1 month Leaving this value blank will default to the Application Maximum Subscription Duration (if provided)

APPENDIX D – CSV FILE REQUIREMENTS – BATCH OTP

	A	B	C
1	userID	subscriptionPeriod	
2			

Field	Cardinality/ Values	Response/Comments
User ID	Required	Accepts approved users with valid UserID
Subscription Period	Optional	Acceptable Options: #y#t#d#h#m#s e.g., 1y = 1 Year, 1y1t = 1 year + 1 month  Leaving this value blank will default to the Application Maximum Subscription Duration (if provided)