



Managed Access Gateway (MAG) Adoption Administrator Guide

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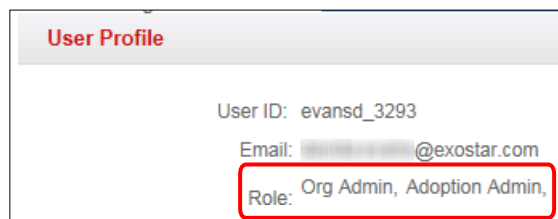
DOCUMENT VERSIONS

Version	Impacts	Date	Owner
Adoption Administrator Guide, IAM 6.10	<ul style="list-style-type: none"> Adoption Administrators can sponsor OTP credentials via Exostar's Adoption Module 	November 2018	S. Puthanveetil
Adoption Administrator Guide	<ul style="list-style-type: none"> Updated description for external organization and user IDs. Updated notes in Begin new invitation for New User section. 	January 2019	S. Puthanveetil
Adoption Administrator Guide, MAG 6.11	<ul style="list-style-type: none"> Updated the product name from IAM to MAG Adoption Administrators can now search for users by User ID (updated the screenshot) Included a section on Reporting in MAG, specifically highlighting the Onboarding Status Report 	April 2019	S. Puthanveetil
MAG 6.14	<ul style="list-style-type: none"> Remove OTP from FTL process Update Password Policy 	June 2020	B. Nair
MAG 7.0	<ul style="list-style-type: none"> Self-Registration New Organization Adoption Invitation registration process Dashboard Purchasing Credentialing Activation Authentication 	February 2021	B. Nair

OVERVIEW

The Adoption Module allows you to invite external companies, as well as external or internal users to Exostar's Managed Access Gateway (MAG) Platform, and allows you to subscribe the company or user to applications or services.

You MUST have the **Adoption Administrator** role for the applications in which you want to invite users and organizations. Exostar grants the Adoption Administrator role. To confirm you have the Adoption Administrator role, log into your MAG account, and click the **My Account** tab. Under the **User Profile** section, your roles display.



If you do not see the application or service you want to invite a user or company to, work with your Exostar point of contact to request the role of Adoption Administrator for those applications.

ACCESS

Login to your MAG account, and click the **Adoption** tab. Working within the Adoption tab, you have two options:

1. **View Existing Invitations** allows you to search for existing invitations or to continue to saved invitations.
2. **Begin New Invitation** allows you to begin a new invitation for a user or organization.

NOTE: Both options open the **Adoption Module** in a new browser window.



BEGIN NEW INVITATION FOR EXISTING USER

1. To invite an existing user to an application, click the **Begin New Invitation** link. Enter the user's complete email address or MAG user ID (if known), and click **Search**.

2. If the system finds a match, a list of results displays. If the user has multiple MAG profiles, the Adoption Module displays all active and inactive profiles. Select an **Active** account. If no match is found, see the [Begin New Invitation for New User](#) section below.

Tips:

- If multiple accounts exist with an **Active** MAG account status, scroll to the right to view **the List of Active Apps** column. You may want to select the account subscribed to the most applications AND with an **Active** MAG account status.
- An inactive or unsubscribed account indicates the user never completed **their account activation**. Select an account by clicking the user's hyperlinked last name.
- You can sort the columns by clicking the header names. If multiple accounts exist for the user, check the MAG account status column. You may want to reach out to the user to ask what account you should use.

3. Click the **Last Name** link to select a user.

Last Name	First Name	User ID	Organization Name	Organization ID	External Organization ID	External User ID	MAG Status	PKI	RDP Status	OTP Hardware Token Status	Phone Based OTP Status	List of Active Apps
Howell	Ashleigh	farleya_1382	Wayneswidgets	Wayneswidgets	SourcePass:44290		Active	Basic	N/A	N/A	N/A	Federated Identity Service (FIS) Supply Chain Platform - Boeing (BSCP)
Farley	Ashleigh	farleya_7501	Wayneswidgets	Wayneswidgets			Active	N/A	N/A	N/A	N/A	

4. After clicking the user's last name, the **User Profile** displays. Select the applications or services to which you want to invite the user.

- a. **User Profile Information:** This section includes the user’s contact information, organization information, and credential information.

User Profile Information	
Title:	
First Name: Ashleigh	Address 1: 2325 Dulles Corner Blvd #600
Middle Name:	Address 2:
Last Name: Howell	City: Herndon
Job Title:	State/Province: VA
Organization Name: Exostar LLC	Zip/Postal Code: 20171
Business Unit:	Country: United States
Organization ID: exostar	FIS Assurance Level: N/A
MAG Status: Active	OTP Hardware Token Status: N/A
	R-IDP Status: N/A

- b. **Organization Credential Information:** This section displays credentials to which the organization is subscribed.

Organization Credential Information	
FIS Assurance Level: FIS Medium	R-IDP Status: N/A

- c. **Application Information:** This section displays the status of an organization’s access to the listed applications and services. If the status is **Pending Acceptance of Terms & Conditions**, you can invite the user.

Application Information	
Application Name	Status
Board Portal	Active
Systems Portal	Inactive
Aeronautics/Main	Inactive
Airlift	Inactive

- d. **Invitation Information:** This section provides a list of applications you can choose to invite the user to. You must have the Adoption Administrator role for the application in order to submit a successful invitation. If a user already has access to an active application, you cannot invite them to the application.

Application Name
<input type="checkbox"/> Board Portal
<input type="checkbox"/> Portal
<input type="checkbox"/> .35 Production
<input type="checkbox"/> OneAero
Applications: <input checked="" type="checkbox"/> Procure to Pay Service
<input type="checkbox"/> Research.net
<input type="checkbox"/> SharePoint
<input type="checkbox"/> Online Account Request
<input type="checkbox"/> Supplier Portal
<input type="checkbox"/> Supply Chain Platform

5. Once you select the application, you can choose to assign the user as the **Application Administrator** for the selected application. If the organization is not already subscribed to the application, the system automatically selects the checkbox and cannot be modified.

Application Name: Sponsor Code:

Federated Identity Service (FIS)

Phone OTP
Hardware OTP
Exostar Mobile ID
International Phone OTP
Proofing Required

* External Source Name: Exostar QA The External Source Name identifies the partner issuing the invitation. It is required in order to enter an External User ID and External Organization ID. [Get more information on External Source Names here.](#)

External User ID: External User ID is a unique identifier used by your organization for this user.

External Organization ID: External Organization ID is a unique identifier used by your organization for this user.

External Organization ID, External User ID, and Sponsor Code are all optional fields. For help with these fields, [view more information.](#)

Message to User (to be included in email notification):

I am inviting on behalf of:

NOTE: The **Sponsor Code** field is not required.

6. Complete the remainder of the invitation. If your organization is setup to sponsor credentials for users, please reference the [Sponsoring Credential](#) section of this document.
- Phone Based OTP:** If the user requires a Phone Based OTP, check the box provided.
 - Hardware OTP:** If the user requires an OTP Hardware Token, check the box provided.
 - Exostar Mobile ID Required:** If the user requires Exostar Mobile ID, check the box provided.
 - International Phone OTP:** If the user is located internationally and requires Phone OTP, check the box provided.
 - Proofing Required:** If the user requires Identity Proofing or the Identity Proofing Upgrade, check the box provided.

NOTE: You cannot select the checkbox for OTP Hardware Token or Proofing Required if FIS or Phone Based OTP is checked. If FIS or OTP Hardware Token is selected, you cannot select the check box for Phone Based OTP.

- f. **External Source Name:** This field should default, however, if you have the option to select from the drop-down menu, choose your company name.
- g. **External User ID:** This field is optional, and must be unique for the user (such as a partner or vendor user ID), however, if the user was previously invited for another application from your organization, this field pre-populates and is read-only.
- h. **External Organization ID:** This field is optional, and must be unique for the company (such as a partner or vendor company ID), however, if this information was already entered once for the company, it will pre-populate and is read-only. If you have a partner or vendor ID for the organization, you will enter it in this field.
- i. **Message to User:** This field is optional; allows you to enter up to a 500 character personalized message to include in the invitation email sent to the user.
- j. **I am inviting on behalf of:** This option allows you to specify an alternate contact in the notification emails sent to the user. If you select this option, you are required to specify the information shown below. This information is included in the email notification. If I am inviting on behalf of option is not selected, this information defaults to the Adoption Administrator's information issuing the invitation.

I am inviting on behalf of:

* Actual Inviter's Name :

* Actual Inviter's Organization :

* Actual Inviter's Email Address :

7. Click **Next** to continue. The **Invitation Information** page displays. Click **Submit**.

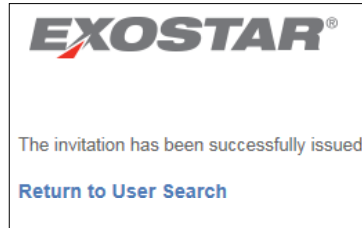
Invitation Information

Full Name : Ashleigh Howell
Email Address: ashleigh@exostar.com
Organization Name: Exostar LLC
Organization ID: exostar
OTP Hardware Token Required : NO
Message to User :

Subscribe User to Application	Assign Application Administrator Role to User	Subscribe Organization to Application
Supply Chain Platform - Boeing 787 SCMP	No	No

Click 'Submit' to issue the invitation for the application(s) listed.

NOTE: If you receive a page prior to this, titled **Organization Subscriptions**, click **Save**, and the **Invitation Information** page displays. Once you successfully submit the invitation, a confirmation page displays.



As the Adoption Administrator, you receive a notification once the user completes their invitation. If you selected the requirement for an **OTP Hardware Token, Proofing Required, Exostar Mobile ID or Phone Based OTP**, the user receives a notification to purchase the credential. The company's **Organization Administrator** also receives a notification alerting them the user is subscribed to an application.

BEGIN NEW INVITATION FOR NEW USER

1. If you are unable to locate the user after searching their email address or User ID, click **Search Organizations** to see if the user's organization exists.

A screenshot of a web form titled "User Search". At the top left are two buttons: "Search Organizations" and "Add Organization". Below the title is a search area with the following fields and labels: "Email Address : [input field] Email Address or User ID is required to perform a search", "OR", "User Id : [input field]", "First Name : [input field] (Optional)", and "Last Name : [input field] (Optional)". At the bottom are three buttons: "Search", "Clear", and "Cancel".

2. Enter any company details and click **Search**.

- An Organization Name, Exostar ID, External Organization ID, DUNS Number, or US Federal Tax ID Number is required to search for an organization.
- Use more than one search criterion to narrow down your results.
- Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Search

Organization Name: x

DUNS Number:

Address 1:

City:

Country:

External Source Name:

Exostar ID:

US Federal Tax ID Number:

Address 2:

State/Province:

Zip/Postal Code:

External Organization ID:

3. The system lists all possible matches. Click the **Org Name** for the company to which you want to invite the user.

Organization Search

Organization Name:

DUNS Number:

Address 1:

City:

Country:

External Source Name:

Exostar ID:

US Federal Tax ID Number:

Address 2:

State/Province:

Zip/Postal Code:

External Organization ID:

• 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.

Results per page:

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RIDP Status	List of Active Apps	List of Pending Apps
Tee's testing Account 1234 Testing Lane Herndon, VA 20171, United States	EXO118193763	118193763		Active	N/A	N/A		

NOTES:

- You can sort columns to review the results by clicking the icon located next to each column header, to avoid creating duplicate organization accounts.
- If the status of the organization's Exostar account is **Unsubscribed**, you have to invite the organization. Please refer to the [Organization Not Subscribed](#) section in this guide for details.
- If the organization is not listed, or there are no matches, please refer to the [Begin New Invitation for New Organization and User](#) section in this guide.

4. The **Organization Summary** page displays. Under the **Actions** section, click **Invite New User**.

Tee's testing Account - Org Summary

<p>Organization Summary</p> <p>MAG Information</p> <p>Actions</p> <p>Invite Organization</p> <p>Invite new user</p> <p>Close</p>	<ul style="list-style-type: none"> To issue an invitation to a new user in this organization, click the 'Invite New User' link under Actions to the left. To return to the Organization Search Results, click the 'Close' link under Actions. Need additional help? - Refer to the Adoption Administrator Guide <table border="1"> <tr> <td>Organization Name:</td> <td>Tee's testing Account</td> <td>Address 1:</td> <td>1234 Testing Lane</td> </tr> <tr> <td>Address 2:</td> <td></td> <td>City:</td> <td>Herndon</td> </tr> <tr> <td>State/Province:</td> <td>VA</td> <td>ZIP/Postal Code:</td> <td>20171</td> </tr> <tr> <td>Country:</td> <td>United States</td> <td>DUNS Number:</td> <td></td> </tr> <tr> <td>Other DUNS Number:</td> <td></td> <td>Exostar ID:</td> <td>118193763</td> </tr> <tr> <td>Organization ID:</td> <td>EXO118193763</td> <td>Exostar MPID:</td> <td>4f06998b-1a15-44fa-a7a8-4faf548ffa7</td> </tr> </table>	Organization Name:	Tee's testing Account	Address 1:	1234 Testing Lane	Address 2:		City:	Herndon	State/Province:	VA	ZIP/Postal Code:	20171	Country:	United States	DUNS Number:		Other DUNS Number:		Exostar ID:	118193763	Organization ID:	EXO118193763	Exostar MPID:	4f06998b-1a15-44fa-a7a8-4faf548ffa7
Organization Name:	Tee's testing Account	Address 1:	1234 Testing Lane																						
Address 2:		City:	Herndon																						
State/Province:	VA	ZIP/Postal Code:	20171																						
Country:	United States	DUNS Number:																							
Other DUNS Number:		Exostar ID:	118193763																						
Organization ID:	EXO118193763	Exostar MPID:	4f06998b-1a15-44fa-a7a8-4faf548ffa7																						

NOTE: If subscribing the user to Partner Information Manager (PIM) or need to include a partner or vendor ID for the organization, click **Invite Organization**, then click **Edit Organization Subscription**. You will be able to select application(s) and enter the **External Organization ID**. After saving, you can **Add User**.

5. On the **User Profile Information** page, enter the user's information. Please note the required fields (marked with an asterisk*) must be provided or you receive an error when attempting to submit the invitation.

User Profile information

Title: <input type="text" value="Please Select..."/>	* Address 1: <input type="text"/>
* First Name: <input type="text"/>	Address 2: <input type="text"/>
Middle Name: <input type="text"/>	* City: <input type="text"/>
* Last Name: <input type="text"/>	* State/Province: <input type="text"/>
* Email Address: <input type="text"/>	(Enter ISO two character values, e.g., NY for New York)
* Confirm Email Address: <input type="text"/>	Zip/Postal Code: <input type="text"/>
Job Title: <input type="text"/>	* Country: <input type="text" value="Please Select..."/>
* Phone: <input type="text"/>	Timezone: <input type="text" value="America/New_York"/>
Fax: <input type="text"/>	

Invitation Information

6. Under the **Invitation Information** section, you must do the following:

- Select the application you want to invite the user to. If you would like to designate the user as an **Application Administrator** for the application, check the box provided.

Application Name	Sponsor Codes	Application Administrator
<input type="checkbox"/> Aero		<input type="checkbox"/>
<input checked="" type="checkbox"/> Board Portal	<input type="text"/>	<input type="checkbox"/>

NOTES:

- In order to invite the user to a specific application, you must have the Adoption Administrator role for the application.
- If subscribing the organization to a new application, the invited user is assigned the role of Application Administrator (by default) for the subscribed application.
- If the organization is not already subscribed to the application, the Application

- Administrator checkbox is automatically selected, and you cannot modify.
- If your organization is subscribed to sponsoring credentials for users, please reference the Sponsoring Credential section of this document.
 - Phone Based OTP:** If the user requires a Phone Based OTP, check the box provided.
 - Hardware OTP:** If the user requires an OTP Hardware Token, check the box provided.
 - Exostar Mobile ID Required:** If the user requires Exostar Mobile ID, check the box provided.
 - International Phone OTP:** If the user is located internationally and requires Phone OTP, check the box provided.
 - Proofing Required:** If the user requires Identity Proofing or the Identity Proofing Upgrade, check the box provided.

NOTE: You cannot select the checkbox for OTP Hardware Token or Proofing Upgrade Required if FIS or Phone Based OTP is selected. If FIS or OTP Hardware Token is selected, you cannot select the check box for Phone Based OTP.

- External Source Name:** This field should default, however, if you have the option to select from the drop-down menu, choose your company name.
- External User ID:** This field is optional, and must be unique for the user, however, if the user was previously invited for another application from your organization, this field pre-populates and is read-only.
- External ID:** This field is optional, and must be unique for the company, however, if this information was already entered once for the company, it pre-populates and is read-only.
- Message to User:** This field is optional; allows you to enter up to a 500 character personalized message to include in the invitation email sent to the user.
- I am inviting on behalf of:** This field is optional; allows you to specify an alternate contact in the notification emails sent to the user. If you check this box, you are required to specify the information shown below.

Are you sponsoring credentials for this user: Yes No

Phone OTP
Hardware OTP
Exostar Mobile ID
International Phone OTP
Proofing Required

*External Source Name: Exostar QA The External Source Name identifies the partner issuing the invitation. It is required in order to enter an External User ID and External Organization ID. [Get more information on External Source Names here.](#)

External User ID: External User ID is a unique identifier used by your organization for this user.

External Organization ID: BLFISMED0210 External Organization ID is a unique identifier used by your organization for this user.

External Organization ID, External User ID, and Sponsor Code are all optional fields. For help with these fields, [view more information.](#)

Message to User (to be included in email notification):

I am inviting on behalf of:

*Actual Inviter's Name:
*Actual Inviter's Organization:
*Actual Inviter's Email Address:

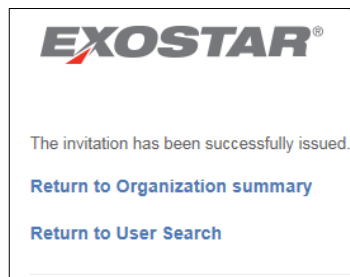
- When you are ready to proceed, click **Next**. The **Invitation Information** page displays. Click **Submit**.

The screenshot shows the 'Invitation Information' page. It contains the following details: Full Name: Tony Stark, Email Address: tony.stark@exostar.com, Organization Name: Tee's testing Account, Organization ID: EXO118193763, and OTP Hardware Token Required: YES. Below this is a 'Message to User' section with a table:

Subscribe User to Application	Assign Application Administrator Role to User	Subscribe Organization to Application
SourcePass	No	No

Below the table, it says 'Click 'Submit' to issue the invitation for the application(s) listed.' At the bottom are 'Submit' and 'Cancel' buttons.

The invitation is successfully issued, and the user receives the invitation via email.



As the Adoption Administrator, you receive a notification once the user completes their invitation. If you selected the requirement for an **OTP Hardware Token, Proofing Required, Exostar Mobile ID** or **Phone Based OTP**, the user receives a notification to purchase the credential. The company's **Organization Administrator** also receives a notification alerting them the user is subscribed to an application.

BEGIN NEW INVITATION FOR NEW ORGANIZATION AND USER

During your search, if you are unable to find a match for the user or the user's organization, you need to add a new organization account to start the invitation.

- From the **Organization Search** page, click **Add Organization**.

The screenshot shows the 'Organization Search' page. It has several input fields: Organization Name (filled with 'SAAS & SAAS Inc.'), DUNS Number, Address 1, City, Country (dropdown), External Source Name (dropdown), Exostar ID, US Federal Tax ID Number, Address 2, State/Province (with a note: '(Enter ISO two character values, e.g., NY for New York)'), Zip/Postal Code, and External Organization ID. Below the fields are 'Search', 'Clear', and 'Cancel' buttons. A message 'No matches found' is displayed. At the bottom left, there is an 'Add Organization' button highlighted with a red box.

2. Enter the company's information. If the **External Source Name** is not defaulted, select your company from the drop-down menu, and click **Next**.

Invite Organization - Basic Information

* Organization Name: SAAS & SAAS Inc.

Business Unit:

DUNS Number: (Enter numbers only, no dashes or spaces)

Address 1: 123 Training Test Dr. Address 2:

* City: Washington * State/Province: DC
(Enter ISO two character values, e.g., NY for New York)

Zip/Postal Code: 20002 Country: United States

* External Source Name: Please Select...
An External Source Name is required in order to enter External Organization ID.

External Organization ID:

Next **Cancel**

NOTES:

- Asterisks indicate required fields. If you are entering the DUNS number, you are required to enter all nine numbers.
- Clicking **Next** allows the system to complete another duplicate search. If no duplicates are found, please proceed to **Step 3**. If possible duplicates are found, review the information, and click **Ignore Duplicate Matches and Request New Organization** if you still want to proceed to **Step 3**.

- The system has found a potential duplicate for the organization you wish to create.
- Please review the list of duplicates 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.
- Need additional help? - Refer to the [Adoption Administrator Guide](#)

Back **Ignore Duplicate Matches and Request New Organization** **Cancel Request**

Resolve Duplicates - Maximum number of matches are limited to 20

3. The **Organization Summary** page displays. The **Actions** section provides the following options:

SAAS & SAAS Inc. - Org Summary

Organization Summary
 MAG Information

Actions

- [Edit Organization](#)
- [Subscriptions](#)
- [List Users](#)
- [Add User](#)
- [Cancel Invitation](#)
- [Save and Resume Later](#)

- Use the links to the left under Actions to add a user to the organization, cancel the invitation, or save and resume the invitation at a later time.
- At least one user is required to submit the invitation. A Submit link will appear in the Actions to the left once a user is added.
- Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name:	SAAS & SAAS Inc.	Address 1:	123 Training Test Dr.
Address 2:		City:	Washington
State/Province:	DC	ZIP/Postal Code:	20002
Country:	United States	DUNS Number:	
Other DUNS Number:		Exostar ID:	114442139
Organization ID:	EXO114442139	Exostar MPID:	1c85370e-3f3a-41a2-ac3e-7b5edd2aa2e5

Next

NOTE: Clicking **Next**, hyperlinked in blue, allows you to see additional organizational details.

- a. **Edit Organization Subscriptions:** Allows you to invite the organization to applications or services. You have the option to designate a Point of Contact (POC), whom the invitation is sent to. From Edit Organization Subscriptions, you can enter the partner or vendor ID

in the External Organization ID field. If subscribing the organization to PIM you will need to create the partner relationship from this section. After you complete this section, click Add User to create user.

Organization Subscriptions

Secure File Transfer

- b. **List Users:** Displays a list of invited users. You have the ability to add additional users, and if you do not need to add additional users, click **Return to Organization Details**.

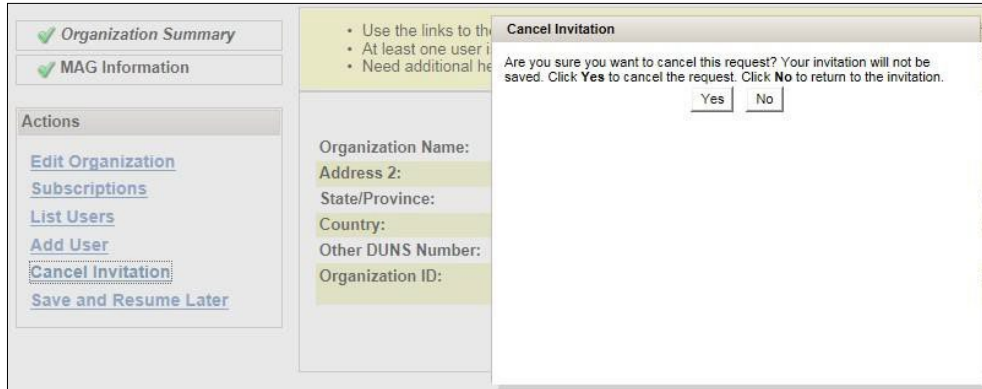
List of Invited Users

Email Address	First Name	Last Name	Application	POC	Action
name@exostar.com	Doug	Star	• TEMPLATESCP	<input checked="" type="checkbox"/>	Delete

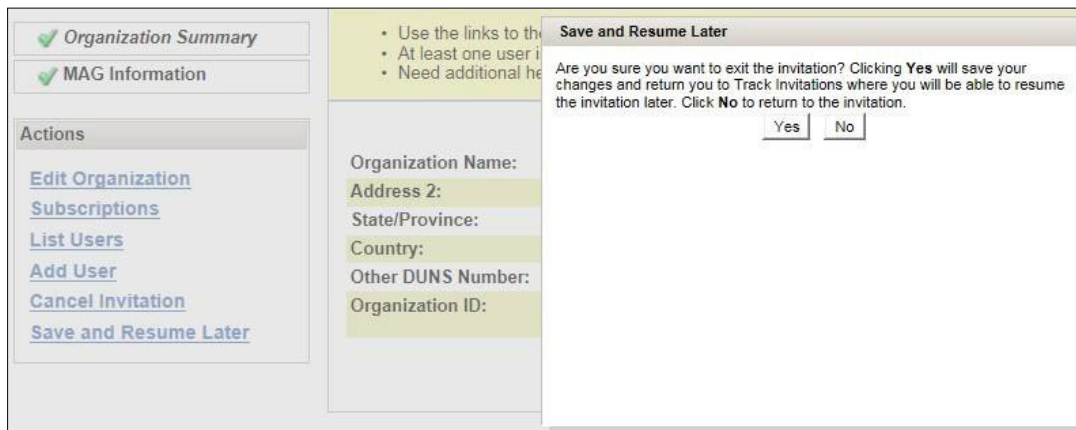
Add Another User
Return to Organization Details

- c. **Add User:** Allows you to invite a user to applications or services. Since you are creating a new organization, the first added user is automatically designated as the primary contact. Enter the user's information, complete the invitation information for the user, and click **Save**. Please note you can enter the user's partner or vendor ID in the External User ID field.

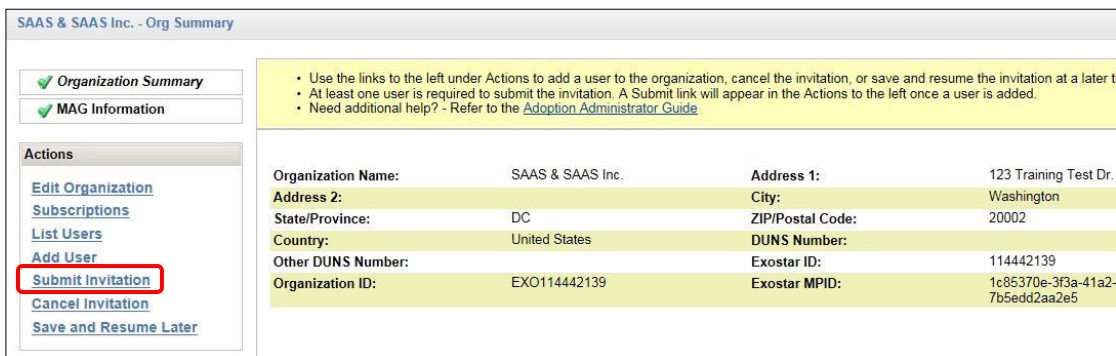
- d. **Cancel Invitation:** Allows you to cancel the invite. Your invitation does not save if you select **Yes**.



- e. **Save and Resume Later:** Allows you to save an invitation and complete it at a later time.



4. After you add users, submit the invitation from the **Actions** section by clicking **Submit Invitation**.



NOTE: The **Submit Invitation** option from the **Actions** menu is NOT available until you add a user.

A notification page displays alerting you the invitation was sent and the user account was created. The **Primary Contact** receives the email invitation prompting them to accept.

ORGANIZATION NOT SUBSCRIBED

1. If you find the company, but it has the status **Not Subscribed**, click the **Org Name**.

Organization Search

Organization Name: Exostar QA Test
DUNS Number:
Address 1:
City:
Country: Please Select...
External Source Name: Please Select

Search Clear Cancel

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.

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RIDP Status
Exostar QA Test Exostar Herndon, VA 20171, United States	EXO081575642	081575642		Not Subscribed	N/A	N/A

2. Click the **Invite Organization** link under the **Actions** section.

Exostar QA Test - Org Summary

Organization Summary

Actions

Invite Organization
Close

- To issue an invitation to this organization, click the 'Invite Organization' link under Actions to the left.
- To return to the Organization Search Results, click the 'Close' link under Actions.
- Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name: Exostar QA Test Address 1:
Address 2: City:
State/Province: VA ZIP/Postal Code:
Country: United States DUNS Number:
Other DUNS Number: Exostar ID:

3. Select the organization name from the **External Source** drop-down menu. Click **Next**.

Invite Organization - Basic Information

* Organization Name: Exostar QA Test
Business Unit:
DUNS Number:
Address 1: Exostar
* City: Herndon
Zip/Postal Code: 20171
* External Source Name: Exostar LLC
External Organization ID:
An External Source Name is required in order to enter External Organization ID.

Next Cancel

- The Adoption Module presents the option to add application subscriptions for the organization, as well as add users. Once you add users, submit the invitation by clicking the **Submit Invitation** link under the **Actions** section.

Organization Name:	Exostar QA Test	Address 1:	Exostar
Address 2:		City:	Hemdon
State/Province:	VA	ZIP/Postal Code:	20171
Country:	United States	DUNS Number:	
Other DUNS Number:		Exostar ID:	081575642
Organization ID:	EXO081575642	Exostar MPID:	a119b4ae-e0ac-4a038a12810177b

SUBSCRIBE ORGANIZATION TO APPLICATION WITHOUT INVITING USER

The Adoption Module allows you to invite an organization to applications without defining a specific user. This is valuable for some applications where a user with a specific role within the supplier company needs access, but you are unsure who that person is.

- Click **Begin New Invitation**, and then click **Search Organizations**.

- Enter the company details and click **Search**. You can search by the supplier's company name, as well as other information such as address, DUNS Number, Exostar ID, or US Federal Tax ID Number.

- The system lists all possible matches. Click the **Org Name** for the company you want to invite the user to.

Organization Search

Organization Name: Exostar ID:

DUNS Number: US Federal Tax ID Number:

Address 1: Address 2:

City: State/Province:

(Enter ISO two character values, e.g., NY for New York)

Country: Zip/Postal Code:

External Source Name: External Organization ID:

• 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.

Results per page:

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RIDP Status	List of Active Apps	List of Pending Apps
Half Note Kitten Lane Herndon, VA 20171, United States	EXO113561195	113561195		Active	FIS Medium	N/A	ForumPass 4 - Belgium Hosted, Federated Identity Service (FIS)	

NOTES:

- You can sort columns to review the results by clicking the icon located next to each column header.
- If the status of the organization’s Exostar MAG account is **Unsubscribed**, you will have to invite the organization. Please refer to the [Organization Not Subscribed](#) section in this guide for details.
- If the organization is not listed or there are no matches, please refer to the [Begin New Invitation for New Organization and User](#) section in this guide.

4. Click **Invite Organization** in the **Actions** section.

Half Note - Org Summary

Organization Summary

MAG Information

Actions

[Invite new user](#) [Close](#)

• To issue an invitation to a new user in this organization, click the 'Invite New User' link under Actions to the left.
 • To return to the Organization Search Results, click the 'Close' link under Actions.
 • Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name: Half Note Address 1: Kitten Lane
 Address 2: City: Herndon
 State/Province: VA ZIP/Postal Code: 20171
 Country: United States DUNS Number:
 Other DUNS Number: Exostar ID: 113561195
 Organization ID: EXO113561195 Exostar MPID: 9c68f2f9-
 eae7c0b

5. Click **Edit Organization Subscriptions**. The Adoption Module displays a list of applications and services you can invite the organization to access. You also have the ability to unsubscribe a company from previously selected applications and services.

If you want to select an application, select the checkbox. To unsubscribe a previously selected application and service, you need to deselect the box.

Organization Subscriptions

ExoConnect
 ExoConnect 2
 Exostar Secure File Transfer

- The **External Source Name** should default, however if you do have the option to select from the drop-down menu, select your company name. The **External Org ID** and **Inviting on behalf of** fields are optional. Click **Save** when you are done.

* External Source Name: The External Source Name identifies the partner issuing the invitation. It is required in order to enter an External User ID and External Organization ID. [Get more information on External Source Names here.](#)

External Org ID: External Org ID is a unique identifier used by your organization for this Organization.

I am inviting on behalf of:

- On the **Organization Summary** page, click **Submit Invitation** under the **Actions** section.

Half Note - Org Summary

- Organization Summary
- MAG Information

Actions

- Edit Organization
- Subscriptions
- List Users
- Add User
- Submit Invitation**
- Cancel Invitation
- Save and Resume Later

• Use the links to the left under Actions to add a user to the organization, cancel the invitation, or save the invitation.

• At least one user is required to submit the invitation. A Submit link will appear in the Actions to the left.

• Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name:	Half Note	Address 1:
Address 2:		City:
State/Province:	VA	ZIP/Postal Code:
Country:	United States	DUNS Number:
Other DUNS Number:		Exostar ID:
Organization ID:	EXO113561195	Exostar MPID:

- A notification page displays alerting you the invitation sent successfully.

EXOSTAR

The following application(s) will be requested for Company Half Note :

- ExoConnect
- Exostar Secure File Transfer

The system assigns the **Application Administrator** role for the application you invited the company to access, and assigns the **Organization Administrator** role to the user who most recently logged into Exostar’s MAG account. The Application Administrator is responsible for approving or denying requests to the application for the company, and they also have the ability to accept the **Terms & Conditions** for the application they are an Application Administrator for.

SPONSORING CREDENTIALS

A company must be set up by Exostar to be able to sponsor One Time Password credentials (OTP) for partners. Please reach out to Exostar to set up your account. All of the below pre-requisites must be met before you can start sponsoring credentials:

- A contractual agreement with Exostar is required to set an organization up as a sponsored organization.
- Sponsored organizations may be configured to set up expiration periods for users to register credentials (e.g. users have 30 days to complete registration). Sponsored organizations can also choose not to have an expiration period set.
- Payment for pre-paid OTP credentials is required before the service starts.
- Funds are automatically decremented from the deposited amount once a credential is registered. If funds are depleted, users are unable to complete registration of their sponsored credential. However, they may purchase the credential.
- A list of all organizations that are sponsoring OTP credentials must be provided to Exostar. Once the list is received, Exostar will setup the organization to sponsor OTP credentials (and expiration periods if applicable).
- All Adoption Administrators from sponsoring organizations are eligible to sponsor user credentials.

Once all pre-requisites are met, Adoption Administrators will be notified that they can start sponsoring credentials via Exostar's Adoption Module.

Sponsored Credentials Rules

Once an organization is setup to sponsor user credentials, the following rules apply:

- Organizations sponsoring OTP credentials must have sufficient funds.
- Adoption Administrators can only sponsor credentials if the user does not have any OTP credentials registered to their account.
- Adoption Administrators are unable to sponsor OTP credentials for users whose organizations are subscribed to Enterprise Access Gateway (EAG).
- If subscribing a user to Federated Identity Service (FIS), Adoption Administrators are unable to sponsor credentials.
- If there is an outstanding or pending invitation for the user's sponsored credential, Adoption Administrators are unable to sponsor credentials until the invitation is expired or denied.
- FIS credentials cannot be sponsored.

Invitation Issuance for Sponsored Credentials

Follow the instructions below to issue invitations when credentials are sponsored for new or existing users.

1. Ensure the **User Profile Information** section is complete. Scroll to the **Invitation Information** section to select the application you are subscribing the user to access.

The screenshot shows two sections of a web form. The top section, titled "User Profile Information", contains fields for Title (a dropdown menu), First Name (John), Middle Name, Last Name (Doe), Email Address (john.doe@exostar.com), Confirm Email Address (john.doe@exostar.com), Job Title, Phone (7035551222), Address 1 (1 Oak St), Address 2, City (Herndon), State/Province (VA), Zip/Postal Code (20171), Country (United States), and Timezone (America/New_York). The bottom section, titled "Invitation Information", has a table with columns for "Applications" and "Sponsor Codes". The "Applications" column lists: Boeing Portal, Collab Drive, ForumPass 7 - QA, Partner Information Manager (checked), and Rolls-Royce Global Supplier Portal.

2. If sponsoring credentials, select **Yes** then select credential type by checking the box next to the credential.

This screenshot shows the "Invitation Information" section. It includes the same "Applications" table as the previous screenshot. Below the table, there is a text prompt: "Please specify if your organization is sponsoring the invitee. If yes, select the credentials that your company is sponsoring. Enterprise sponsored users will not be required to purchase and can directly register credentials." Below this prompt is a section titled "Are you sponsoring credentials for this user:" with radio buttons for "Yes" (selected) and "No". Underneath are five rows of credential types with checkboxes: Phone OTP (checked), Hardware OTP, Exostar Mobile ID, International Phone OTP, and Proofing Required.

NOTE: If identity proofing is required for the OTP credential, select **Proofing Required** along with the credential type. If user credentials are not being sponsored, select **No**. Credentials are not sponsored. However, the user receives an email advising that a purchase is required.

This is a close-up of the "Are you sponsoring credentials for this user:" section. It shows the radio buttons for "Yes" (selected) and "No". Below are the five credential types with their checkboxes: Phone OTP (checked), Hardware OTP, Exostar Mobile ID, International Phone OTP, and Proofing Required (checked).

3. If your organization has insufficient funds for sponsoring user credentials, a notification displays. Please work with Exostar Sales to replenish funds.

The screenshot shows a web form titled "Invitation Information". It has two columns: "Application Name" and "Sponsor Codes". Under "Applications:", there are four checkboxes for "Boeing Portal", "Collab Drive", "ForumPass 7 - QA", "Partner Information Manager", and "Rolls-Royce Global Supplier Portal". A red-bordered box highlights a message: "Your organization has insufficient funds to sponsor users at this time." Below this, there is a note: "Please specify if your organization is sponsoring the invitee. If yes, select the credentials that your company is sponsoring. Enterprise sponsored users will not be required to purchase and can directly register credentials." A question "Are you sponsoring credentials for this user:" has radio buttons for "Yes" and "No", with "No" selected. Below are checkboxes for "Phone OTP", "Hardware OTP", "Exostar Mobile ID", "International Phone OTP", and "Proofing Required".

4. When ready to submit, click **Save**. The user receives an email advising that credentials are sponsored. If you have set an expiration date for registration of the credential, the user must complete registration within the expiration time period.

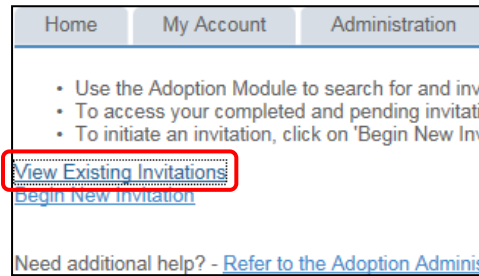
CREATE PARTNER COMPANY RELATIONSHIP (REQUIRED FOR PIM SUBSCRIPTIONS)

Creating this relationship allows your company to view a shared form in PIM. If you do not complete this step, you will be unable to see your partner company's (supplier) form.

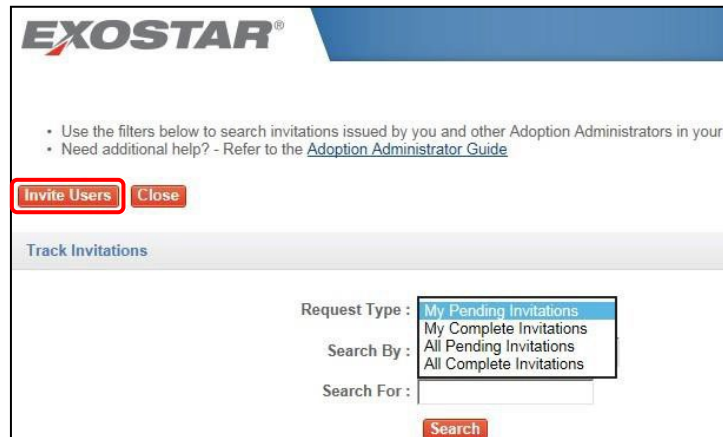
1. Once you locate the organization and access the organization's details, **click Invite Organization** from the **Actions** menu.
2. Click **Edit Organization Subscriptions**.
3. Select **Partner Information Manager**, and select the required form. If the system does not allow you to select the form, the relationship has already been established. No further action is required. You can access PIM to check the status of your supplier.
4. Click **Save**, then **Submit Invitation**. PIM Application Administrators receive an email notification.
5. If you locate an existing account for the user, but the user is not subscribed to PIM, you will need to subscribe this user to PIM. From user search, determine if the user is subscribed to PIM. View the List of Active Apps column. If PIM displays in the **List of Pending Apps** column, user must contact the Application Administrator at their organization. If PIM does not display in **List of Active Apps** or **List of Pending Apps**, you must subscribe the user to the PIM application. If the user is subscribed to PIM, no further action is required.

TRACK INVITATIONS

1. To track invitations, go to the Adoption Module and click **View Existing Invitations**.



2. On the **Track Invitations** page, search invitations sent by you or by any **Adoption Administrator**. You also have the ability to invite a user by clicking **Invite Users**.



3. Select the following information:
 - a. **Request Type:** choose from the drop down menu
 - **My Pending Invitations:** all pending invitations issued by the Adoption Administrator
 - **My Complete Invitations:** all completed invitations issued by the Adoption Administrator
 - **All Pending Invitations:** all pending invitations issued by all Adoption Administrators
 - b. **All Complete invitations:** all completed invitations issued by all Adoption Administrators
 - c. **Search By:** this field is NOT required. Choose to search by any criteria listed in the dropdown menu, including: email address, Exostar ID, Organization ID, External Org ID, External User ID, or Date Submitted.

NOTE: The search criteria below depends on the request type you select:

- Email Address
- Exostar ID

- Organization Name
- Adoption Administrator Last Name: unavailable if searching using My Pending and My Complete invitations
- Adoption Administrator First Name
- External Organization ID
- External User ID
- Date Submitted: specify a date range for your search
- Date Completed: specify a date range for your search. This option is unavailable if searching by pending requests.

4. Once you set your criteria, click **Search**. The results vary depending on the search criteria you set.

Track Invitations

Request Type: All Pending Invitations

Search By: Adoption Administrator Last name

Search For: Evans

Search

Results per page: 25

Request ID	Invitee	Email Address	Adoption Administrator First Name	Adoption Administrator Last Name	External Source Name	External Organization ID	External User ID	Status
f059a138-e063-4e1e-8cf8-2b64670e8827	INTEGRATED NETWORKING TECH		Adrienne	Evans	Exostar LLC			Pending
3c234d7f-3369-4e73-9260-e9ac22fe1669	Bell Helicopter-FIS Testing-SHA-2		Adrienne	Evans	Exostar LLC			Pending
c4e0a40a-0e0f-46d1-a240	Gup Wiggles Test		Adrienne	Evans	Exostar LLC			Pending

5. Click the invitation to view additional details.

Org Invitation Detail (REF:26eb19a2-e143-41f8-aefd-4b69a78ef8ba)

User: Davida Evans (evansd_3293)

[Back](#) [Resume](#) [Delete Invitation](#)

Organization Summary

Organization Name: Exostar QA Test Organization ID: EXO081575642
 Address 1: Exostar Address 2:
 City: Herndon State/Province: VA
 Zip/Postal Code: 20171 Country: United States
 DUNS Number: MAG Status: Incomplete
 External Source Name: Exostar LLC External Organization ID:

Invitation Status

Invitation Status: Incomplete Date Submitted: 06 Oct, 2016 06:08 PM EDT
 Date Completed: Adoption Administrator: Davida Evans

Organization Application Details

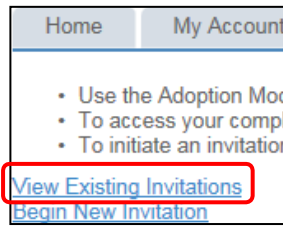
Application Name	Status	Notes
SourcePass	Incomplete	

User Details

Email Address	Application Name	Primary Contact	Action
davida.evans@exostar.com	SourcePass	<input checked="" type="checkbox"/>	View Details

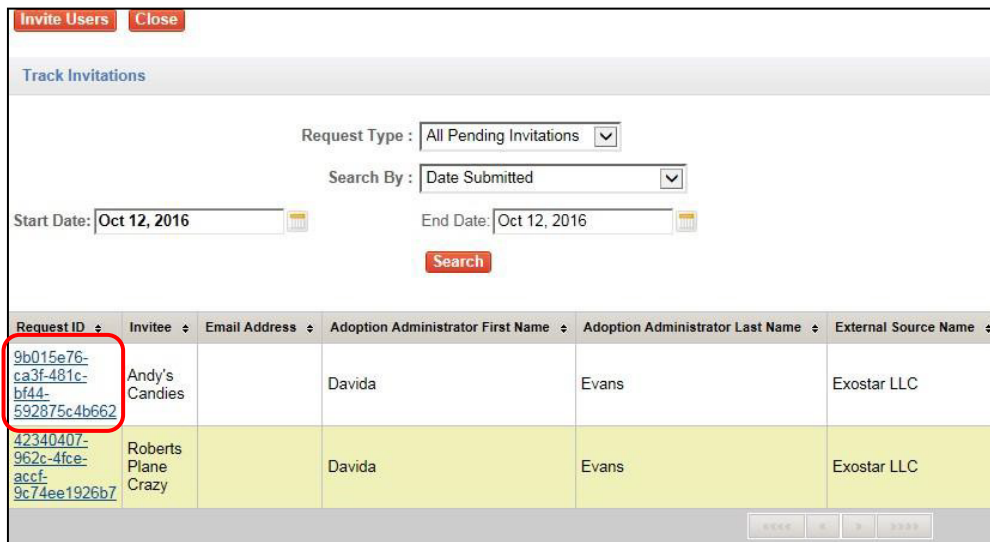
DELETE INVITATIONS

1. To delete an invitation, access the **Adoption** tab and click **View Existing Invitations**.

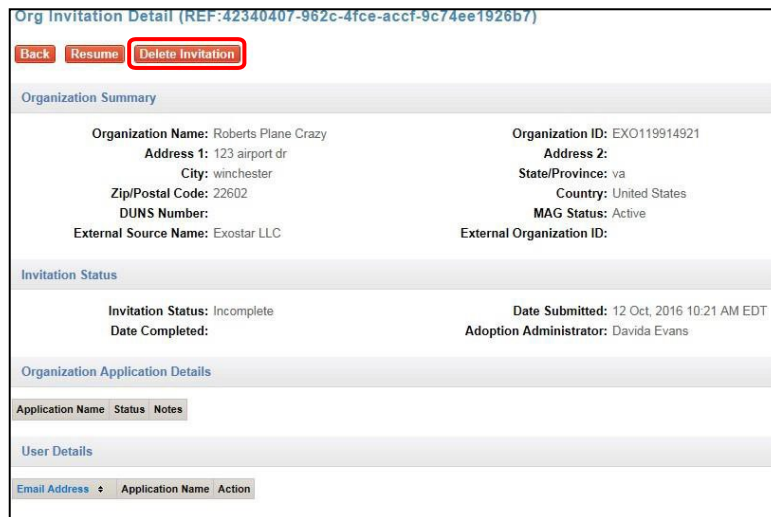


NOTE: This is a permanent action and cannot be reversed.

2. Using the search criteria you selected, locate the invitation you want to delete. Click the **Request ID**.



3. The **Org Invitation** page displays. Click **Delete Invitation**.



4. After you delete the invitation, you will no longer see it in the listing on the search page.

Track Invitations

Request Type: All Pending Invitations

Search By: Date Submitted

Start Date: Oct 12, 2016 End Date: Oct 12, 2016

Search

Results per page: 2

Request ID	Invitee	Email Address	Adoption Administrator First Name	Adoption Administrator Last Name	External Source Name	External Organization ID	External User ID	Status
9b015e76-ca3f-481c-bf44-592875c4b662	Andy's Candies		David	Evans	Exostar LLC			Incomplete

SUBSCRIBE COMPANY OR USER TO FEDERATED IDENTITY SERVICE

When inviting a company to Federated Identity Service (FIS), you are required to invite a user. To verify if a company is subscribed to FIS, and what assurance level the company is subscribed to, view the **PKI** column during your **Organization Search**. The illustration below shows the company is subscribed to FIS Medium Level of Assurance.

Organization Search

Organization Name: roberts plane

DUNS Number:

Address 1:

City:

Country: Please Select... (Enter ISO two character value)

External Source Name: Please Select

Search Clear Cancel

- 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

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RDP Status
Roberts Plane Crazy 123 airport dr winchester, va 22602, United States	EXO119914921	119914921		Active	FIS Medium	N/A

1. To invite the user to FIS, click **Add User** under the **Actions** section.

Roberts Plane Crazy - MAG Information

Organization Summary

MAG Information

Actions

- Edit Organization
- Subscriptions
- List Users
- Add User**
- Cancel Invitation
- Save and Resume Later

Use the links to the left under Actions to add a user to the organization, cancel the invitation, or resume later.

At least one user is required to submit the invitation. A Submit link will appear in the Actions section when a user is added.

Need additional help? - Refer to the [Adoption Administrator Guide](#)

Previous

MAG Organization Name: Roberts Plane Crazy

MAG DUNS Number:

Address 1: 123 airport dr

City: winchester

ZIP/Postal Code: 22602

MAG HQ Country: United States

Do not allow users of my Organization to be invited to applications

External Organization ID: (Exostar LLC)

FIS Level of Assurance: FIS Medium

Previous

2. Enter the user's information. Under the **Invitation Information** section, select **FIS**.

User Profile Information

Title:

* First Name: * Phone:

Middle Name: Fax:

* Last Name: Address 1:

Job Title: Address 2:

* Email Address: City:

* Confirm Email Address: State/Province: (Enter ISO two character values, e.g., NY for New York)

3. When you select **FIS**, the field expands. Enter the **certificate details**.

Invitation Information

Application Name	Sponsor Codes	Application Administrator
<input checked="" type="checkbox"/> Federated Identity Service (FIS)		
* Certificate Assurance Level:	<input type="text" value="Basic"/>	
* Certificate Type:	<input type="text" value="Software"/>	
* Certificate Usage:	<input type="text" value="Identity"/>	<input type="text"/>
* Certificate Validity period:	<input type="text" value="1 Year"/>	
* Partner Application:	<input type="text" value="Please Select ..."/>	
* Request Reason:	<input type="text" value="Please Select ..."/>	

[Help with FIS Certificates](#)

4. Enter the **External Source Name** and click **Next**.

Invitation Information

* External Source Name: The External Source Name identifies the partner issuing the invitation. It is required in order to enter an External User ID and External Organization ID. [Get more information on External Source Names here.](#)

External User ID: External User ID is a unique identifier used by your organization for this user.

External Organization ID: External Organization ID is a unique identifier used by your organization for this user.

External Organization ID, External User ID, and Sponsor Code are all optional fields. For help with these fields, [view more information.](#)

Message to User (to be included in email notification):

I am inviting on behalf of:

[Help with FIS Certificates](#)

5. The invitation information displays. If everything is correct, click **Submit**.

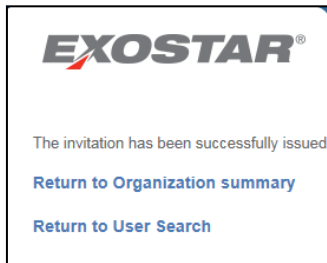
Invitation Information

Full Name : Bee Moore
Email Address: bmorelova@gmail.com
Organization Name: IHOP
Organization ID: EXO116876619
OTP Hardware Token Required : NO
Message to User :

Subscribe User to Application	Assign Application Administrator Role to User	Subscrib
Federated Identity Service (FIS)(Assurance level: Medium Type: Software Validity Period: 1 Year)	No	

Click 'Submit' to issue the invitation for the application(s) listed.

6. You receive a message stating the invitation issued successfully.



NOTES:

- If you are inviting a user to FIS and the organization is subscribed to FIS, requests are always routed to the **FIS Administrator** for approval.
- If the organization is not subscribed to FIS, the system routes the request to Exostar for approval.
- If you are inviting a user to an application group, and the organization is already subscribed to the application group, requests are always routed to the **Application Administrator** for approval.
- If the organization is not subscribed to the application group (bundled applications), the system routes the request to Exostar for approval.

ADOPTION MODULE INVITATION STATUSES

- **Invited:** User/Organization has been invited.
- **Vendor in Process:** Invitation has been sent. The point of contact has started but not accepted or completed the invitation.
- **Pending Exostar Approval:** Invitation is awaiting Exostar approval.

- **Pending:** Invitation is “Active” and pending for further action.
- **Incomplete:** User has not completed the invitation.
- **Completed with Exceptions:** An invitation typically contains multiple actions (e.g. user creation, subscribing the user or organization to an application). When one or more actions of the invitation fails, the invitation will result in this status.
- **Completed:** Invitation has been completed.
- **Rejected:** Invitation has been rejected.
- **Expired:** Invitation is expired.
- **Failed:** All parts of the invitation failed.
- **Cancelled:** Invitation is cancelled.
- **Denied:** Completed invitation has been denied by Exostar most likely due to an existing organization with the same name and/or address.

ONBOARDING STATUS REPORT

Onboarding Status Report is available to Adoption Administrators. This report is a quick and convenient tool for tracking the onboarding of all suppliers invited to MAG by your organization. Have your suppliers registered for a MAG account, or invitations are still pending? Have they obtained their credentials and undergone identity proofing? Who is the point of contact for each individual company? Use this report to gain quick intelligence into where your partners are in their MAG onboarding journey.

After clicking the **Reports** tab, you will be taken to the list of reports available for your administrative role. Follow the prompts to generate the Onboarding Status Report.

The screenshot shows a navigation bar with tabs: Home, My Account, Administration, Registration Requests, Customer Support, Reports (highlighted with a red box), and Adoption. Below the navigation bar, there is a message: "Please click on the report icon to launch that report in a separate window. You must select an application against which the report will be run." and a link: "Need additional help? Refer to [Request Management Guide for Administrators](#)." Below this is a table of reports with a header "Report". The first row, "Onboarding Status Report", is highlighted with a red box and includes the description: "This report provides the onboarding status of the users." Other reports listed include: "All Details Report", "Application Status Report", "Subscriber Credential Report", "Organization User Details Report", "Application & FIS Administrator Information Report", "FIS Daily Certificate Report", "FIS Subscription Action Report", and "Daily Organization Report".

Report
Onboarding Status Report This report provides the onboarding status of the users.
All Details Report This report provides all details of users in an organization to the Organization Administrator
Application Status Report This report provides the application data for Administrators for the application selected
Subscriber Credential Report This report provides credential details for all subscribed users (excluding deactivated) to the selected application.
Organization User Details Report This report provides organization administrators an ability to export all users details of their organization.
Application & FIS Administrator Information Report This report provides the contact details for the Application Administrator and FIS Administrator of organizations that are subscribed to the selected application.
FIS Daily Certificate Report This report provides a list of users and organizations and the various statuses of their FIS certificate approval workflow.
FIS Subscription Action Report This report provides a list of users whose organizations are subscribed to the selected application and have requested FIS subscription. It displays the status of their request.
Daily Organization Report This report provides organization and status information for all organizations that are subscribed to the selected application.