Onboarding Module (OBM)
Buyer Guide

April 2024

CONTENTS

Document Versions 5
Onboarding Module (OBM) Overview 6
Access 6
OBM Buyer Dashboard 8
- Form Status 8
- Expiring Forms 8
- Supplier Scores 9
  - NIST Supplier Score View 9
  - Cybersecurity Compliance and Risk Assessment (CCRA) Questionnaire View 10
- My Reports 10
- Top Header 11
- Lefthand Navigation Menu 11

Form Creation 12
- Step 1. Add New System Form 12
- Step 2. Properties Tab 13
- Step 3. Data Mapping 17
- Step 4. Add Conditional Rules 17
- Step 5. Review Summary Tab 17

Manage System Forms 18
- Enable/Disable Form 19
- Clone Form 19
- Upgrade Form 20

Form Assignments 22
- Assign Single Form to Single Supplier 22
- Assign Single Form to Multiple Suppliers 26
- Assign Multiple Forms to Single Supplier 30
- Reassign Form 34

Form Details Page 34
- Request History 34

Workflow Timeline 35
Assignment History 35
Print Forms 35
Print Last Submitted Forms 35
Print Older Form Version 36
Approval Workflow 36
Bulk Download Completed Forms 37
Bulk Cancel Forms 38
Approval Decision 38
Approve Form 39
Reject Form 40
Manage System Emails 41
User Management 43
Modify User Role and Status 43
Set Role Definitions 44
Modify Existing Role Definitions 45
Create New Role Definitions 46
General Settings 47
General Settings 47
Banner 48
Modify Existing Banner 48
Add New Banner 50
Notification 51
Appearance 52
Upload Logo 53
Customize Links 54
Two-Factor Configuration 57
Attribute Configuration 58
Suppliers 62
Supplier Search 62

Invite 63
Add New Supplier 68
Adoption Module Invitation 73
Scenario 1: Existing Org, Subscribed to OBM, Add New User 73
Scenario 2: Existing Org Subscribed to OBM, Invite Existing User 76
Scenario 3: Shell Orgs with NO Organization Administrator 78
Track Invitations 81

Document Versions

Version	Change Overview	Date
1	Formatting Updates	March 2024
2	Content Additions	April 2024

Onboarding Module (OBM) Overview

The Onboarding Module (OBM) focuses on providing the ability to manage vetting and certification of prospective and existing suppliers. It contains built-in data collection processes and workflows, automated features, and services that allow users to continuously review and make future decisions on supplier relationships.

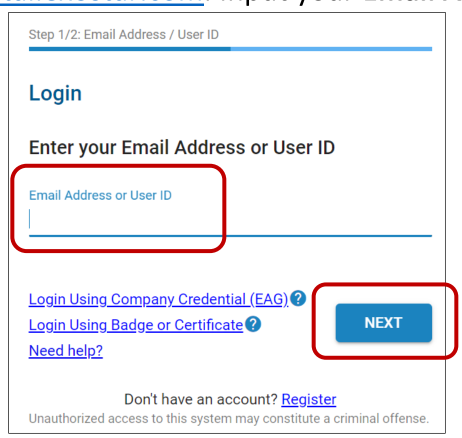
Access

To access OBM, you must have an Exostar's Managed Access Gateway (MAG) account, as well as an acceptable security credential. For help resetting your MAG password or any other MAG-related questions, refer to https://www.myexostar.com/?ht_kb=mag.

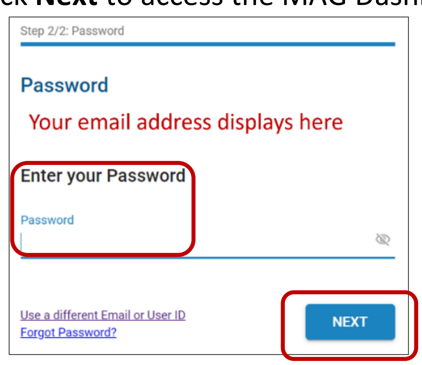
NOTE: If you are the first user in your organization to access OBM, you must accept the standard MAG Usage Service Agreement. If you see **Agree to Terms** on the **Onboarding Module** tile in your MAG account, click the button and accept the service agreement.

Once you successfully activate your MAG account, all subsequent logins proceed as follows:

1. Navigate to https://portal.exostar.com. Input your **Email Address** or **User ID**. Click **Next**.

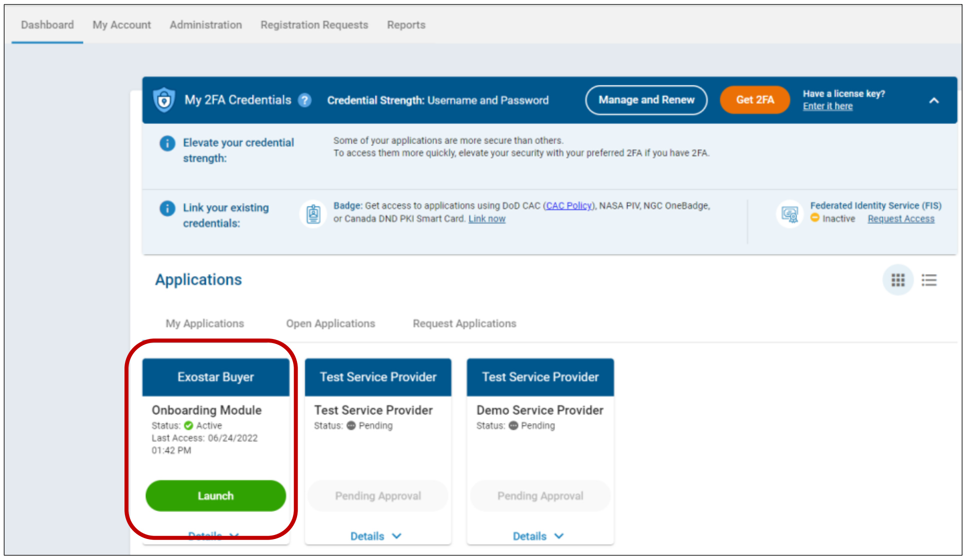


2. Input your **Password**. Click **Next** to access the MAG Dashboard.

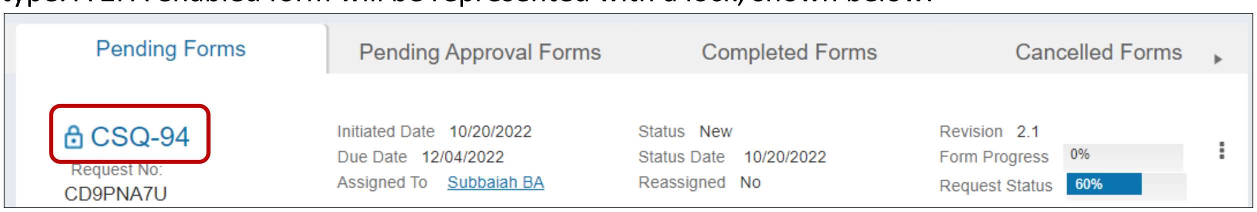


EXOSTAR®

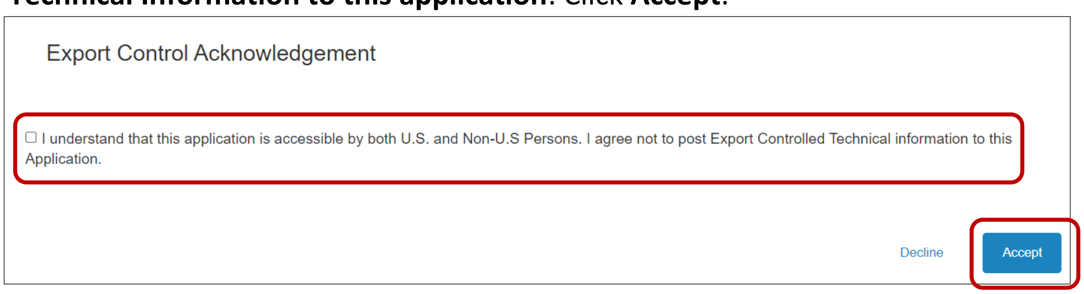
3. From the **My Applications** section, click the **Launch** button from the **Onboarding Module** tile.



IMPORTANT: At this point in the process, the system may prompt for your security credential. The Buyer Organization determines the credential type required to access the OBM application and 2FA enabled forms. Please reach out to the Buyer for more information on the credential type. A 2FA enabled form will be represented with a lock, shown below.



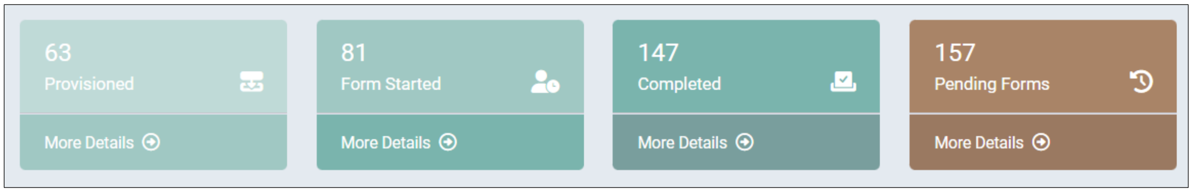
4. Once you successfully login with your security credential, the system displays the **Export Control Acknowledgement**. Place a checkmark next to **I understand that this application is accessible by both U.S. and Non-U.S. Persons. I agree not to post Export Controlled Technical Information to this application**. Click **Accept**.



Once you acknowledge the notice, the OBM dashboard displays.

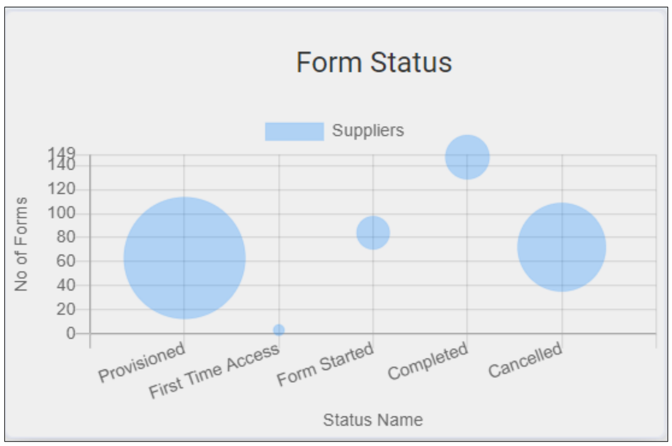
OBM Buyer Dashboard

Depending on your role, the dashboard displays different management options. The four tiles, located under the top header, provide a Form Status snapshot with an option to view additional details.



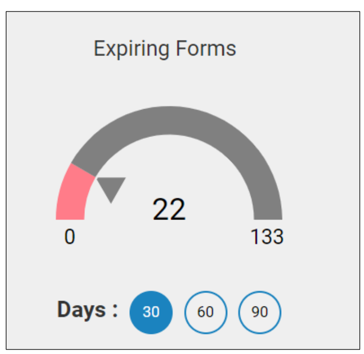
Form Status

This section provides a graph depicting the number of forms/suppliers per status. Hover over each circle to view the exact number.



Expiring Forms

This section provides a number of expiring forms, as well as radio buttons for 30 days, 60 days and 90 days.

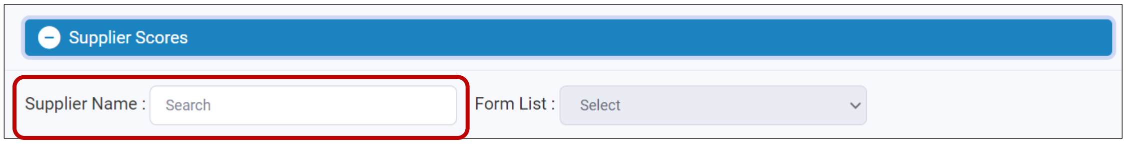


Supplier Scores

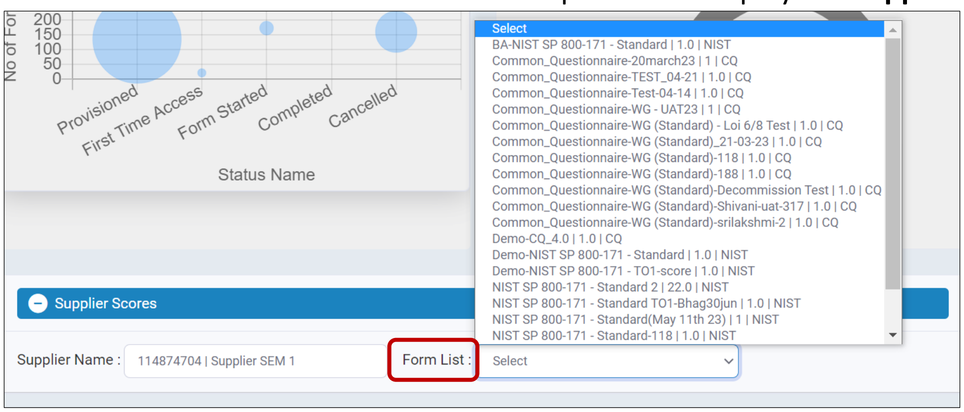
A Buyer Admin can view detailed Supplier Scores for NIST and Cybersecurity Compliance and Risk Assessment (CCRA) Questionnaires. To complete a Supplier search and view scores:

1. Input the **Exostar ID** or **Supplier Name** in the **Supplier Name** field. The corresponding forms will populate in the Form list dropdown.

NOTE: The **Form List** is grayed out until you input a valid Supplier.

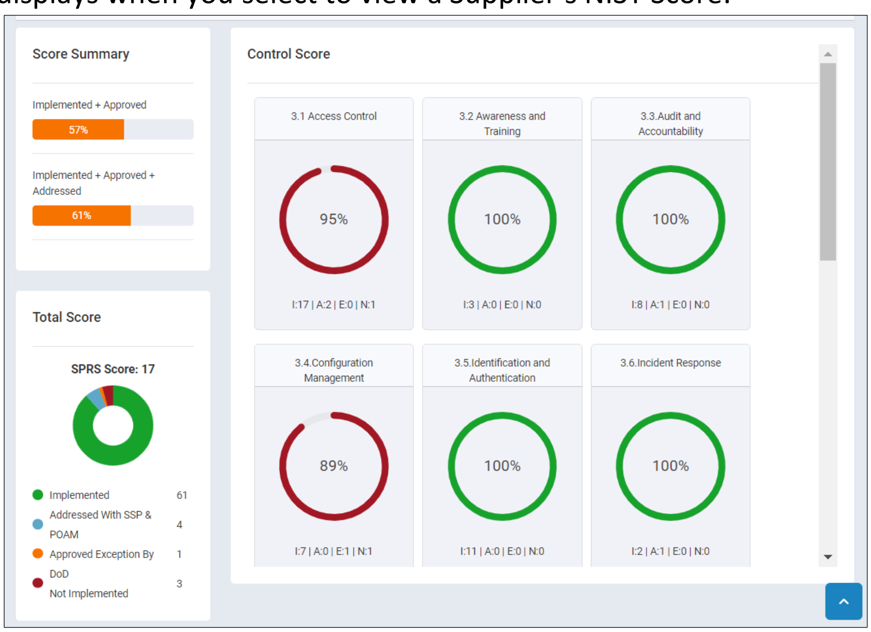


2. Select the desired form from the **Form List** drop-down to display the **Supplier Scores**.



NIST Supplier Score View

The following displays when you select to view a Supplier's NIST Score:



Cybersecurity Compliance and Risk Assessment (CCRA) Questionnaire View

The following displays when you select to view a Cybersecurity Compliance and Risk Assessment (CCRA) Questionnaire Score:

Compliance

Compliance with 48 CFR 52.204-21	Compliant
Compliance with DFARS 252.204-7012	Compliant
Compliance with DFARS 252.204-7020	Compliant
CMMC Certification Level	Not applicable

Risk

Cyber Risk Rating	Yellow
Risk of FCI-only suppliers	Not Applicable

My Reports

This section is automatically collapsed. Select the plus sign (+) to open a view of all the reports you created and added to your dashboard. It is important to note, only ten reports can display on the dashboard at a time. For more information on the My Reports feature, please see the OBM Reporting Guide on the Onboarding Module Training Resources page on myexostar.com.

My Reports

27 m

Event Date	Form Request Is ...	Is Form Upgraded
Sep 29 2021 8:49...	No	No
Sep 29 2021 1:26...	No	No
Sep 29 2021 1:28...	No	No
Sep 30 2021 10:0...	No	No
Oct 7 2021 5:47AM	No	No
Oct 8 2021 11:50...	No	No
Oct 8 2021 5:42PM	No	No
Nov 4 2021 1:22P...	No	No
Nov 4 2021 1:33P...	No	No
Nov 4 2021 1:45P...	No	No

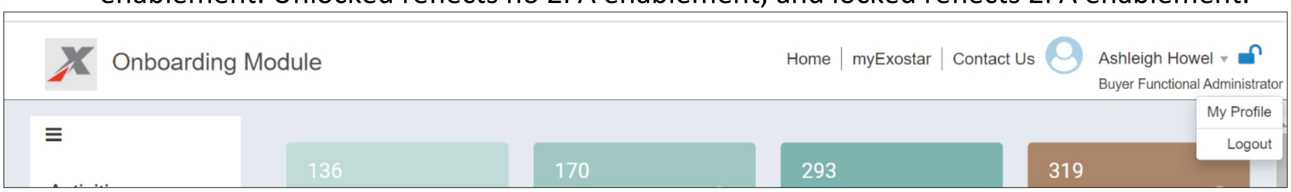
dashboard rep

Completed Date	Form	Last entry date
Feb 3 2023 12:12PM	CR-003 (Standard)-...	Feb 3 2023 12:12PM
Feb 6 2023 6:56PM	OC3-NIST SP 800-...	Feb 6 2023 6:56PM
Feb 24 2023 4:10PM	CR-003 (Standard)-...	Feb 24 2023 4:10PM
Feb 27 2023 9:09PM	Demo-CQ	Feb 27 2023 9:09PM
Mar 4 2023 3:25AM	CR-003 (Standard) ...	Mar 4 2023 3:25AM
Mar 5 2023 3:40AM	CR-003 (Standard-...	Mar 5 2023 3:40AM
Mar 9 2023 6:07AM	Common_Question...	Mar 9 2023 6:07AM
Mar 9 2023 6:07AM	Common_Question...	Mar 9 2023 6:07AM
Mar 17 2023 7:28P...	Common_Question...	Mar 17 2023 7:28P...
Mar 20 2023 6:23A...	TestUAT23	Mar 20 2023 6:23A...

Top Header

The top header provides the following options, and is static regardless of where you are in the OBM application:

- **Exostar Logo**: Click this to redirect to Exostar's corporate website. This feature is editable from the General Settings page.
- **Onboarding Module**: Click this to navigate to the OBM Dashboard. This feature is editable from the General Settings page.
- **Home**: Click this to navigate to the OBM Dashboard.
- **myExostar**: Click this to navigate to Exostar's self-help site, which provides on-screen help content, downloadable guides, FAQs, and more. This feature is editable from the General Settings page.
- **Contact Us**: This section is configurable to point to the desired contact. This feature is editable from the General Settings page.
- **User Drop-down**: This section displays your role, and provides options to navigate to your profile, as well as to log out of the system. The Lock icon reflects 2-Factor Authentication enablement. Unlocked reflects no 2FA enablement, and locked reflects 2FA enablement.



Lefthand Navigation Menu

The following options are available from the left-hand navigation menu, and are dependent on your role and permissions:

- **Activities:**
  - **Form Requests**: This page provides a list of all Pending Forms, Pending Approval Forms, Completed Forms, and Cancelled Forms, as well as search capabilities using various filters. Functional Administrators can send forms to Suppliers from this page as well.
  - **Suppliers**: This page provides the ability to search existing suppliers associated with your organization via MAG and Supplier Management Database (SMD), as well as the ability to add new suppliers and send forms to those suppliers.
  - **Reporting Tool**: This page allows you to run Standard Reports and create User Reports based on various entities like supplier organization, user details, form details, etc.
  - **Approval Decision**: This page is available to Functional Admins when a buyer approval workflow is enabled for any form and provides a list of those forms in the sub tabs **Pending Decision**, **Assigned to me** (Forms assigned to you to enter decision), **Decision Complete** (Forms for which decision is complete).
- **Administration:**

- **Form Lifecycle**: The Manage System Forms page allows you to create new forms, as well as manage existing forms.
- **Email Template**: This page allows you to manage system-generated emails by target audience; Buyer Administrator, Supplier Administrator, or Supplier User.
- **Users & Roles**: This page allows you to manage users access and roles within your organization with OBM access.
- **General Settings**: This page allows you to manage General Settings, Banners, Notifications, Appearance, and Attribute Configuration.

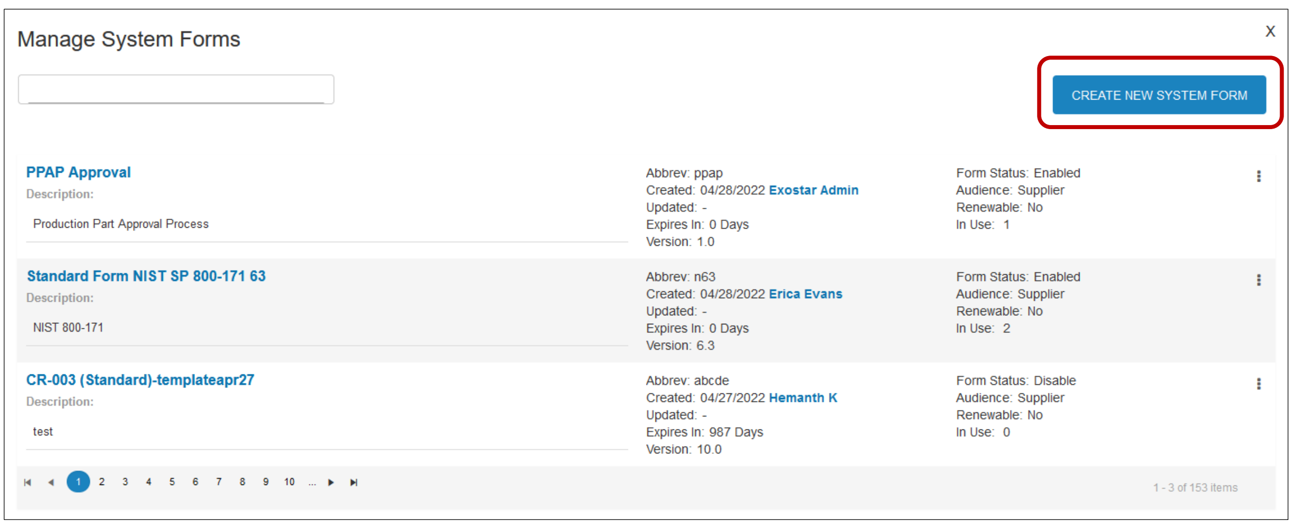
Form Creation

Forms are used to gather supplier information. Buyer Organization Technical Administrators can create multiple forms using the OBM Form Creation functionality. The five-step form creation process is outlined in the sections below.

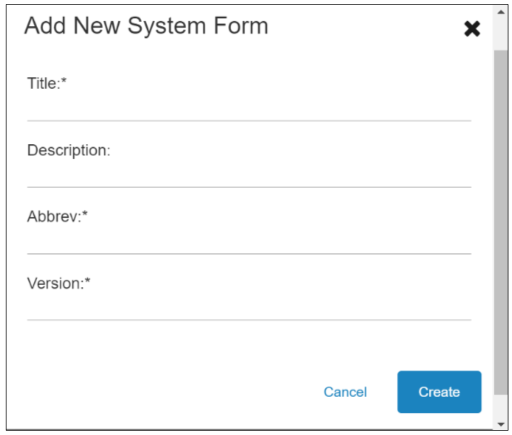
Step 1. Add New System Form

To create a form:

1. On the dashboard, in the left-hand navigation, click **Form Lifecycle.**
2. When the **Manage System Forms** page displays, click the **Create New System Form** button.



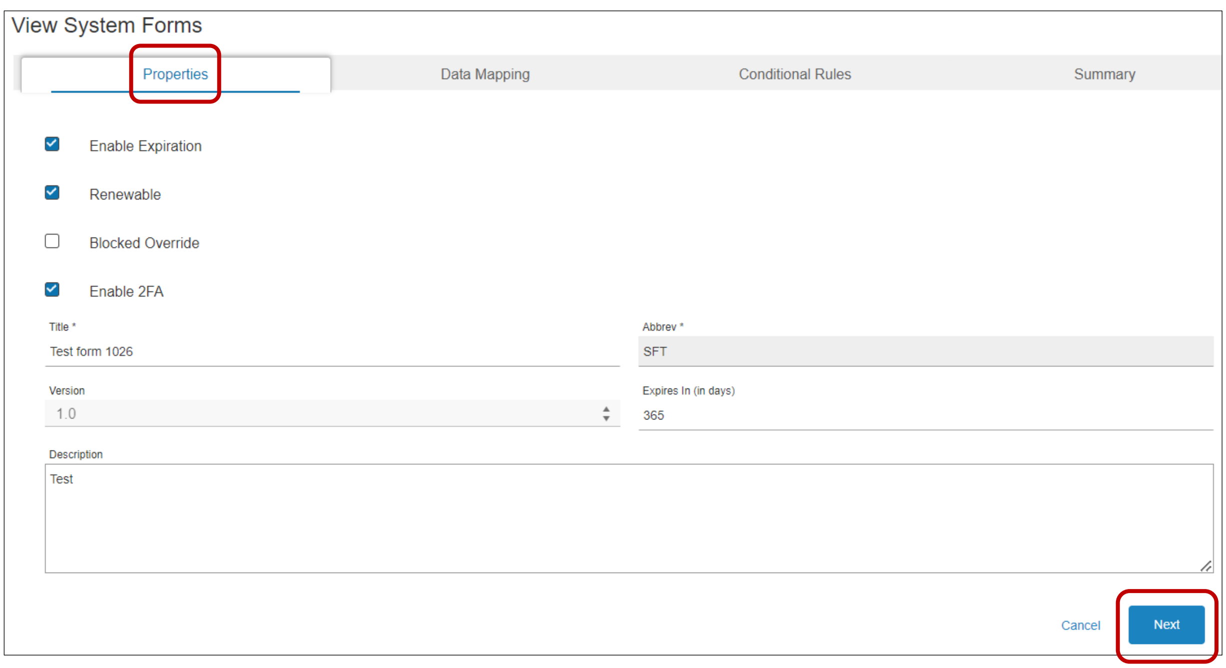
3. In the **Add New System Form** prompt, enter a **Title**, **Description**, **Abbreviation**, and **Version** number for the form. Click the **Create** button.



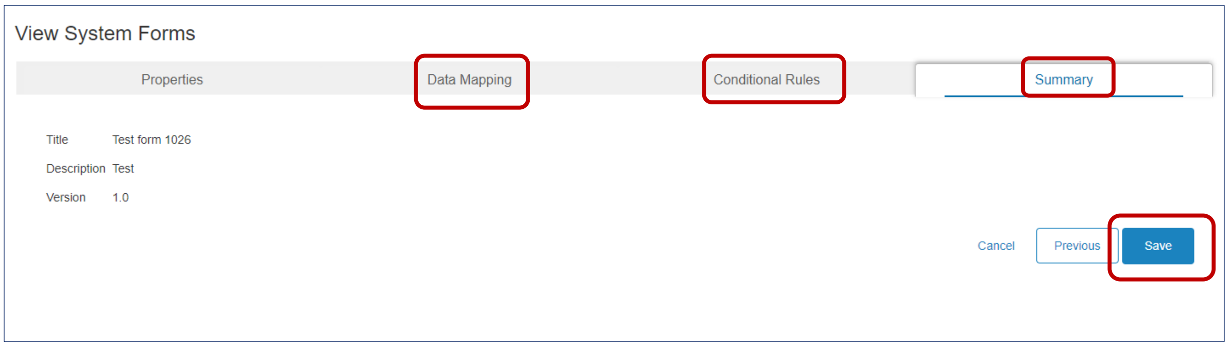
Step 2. Properties Tab

To edit the Properties tab:

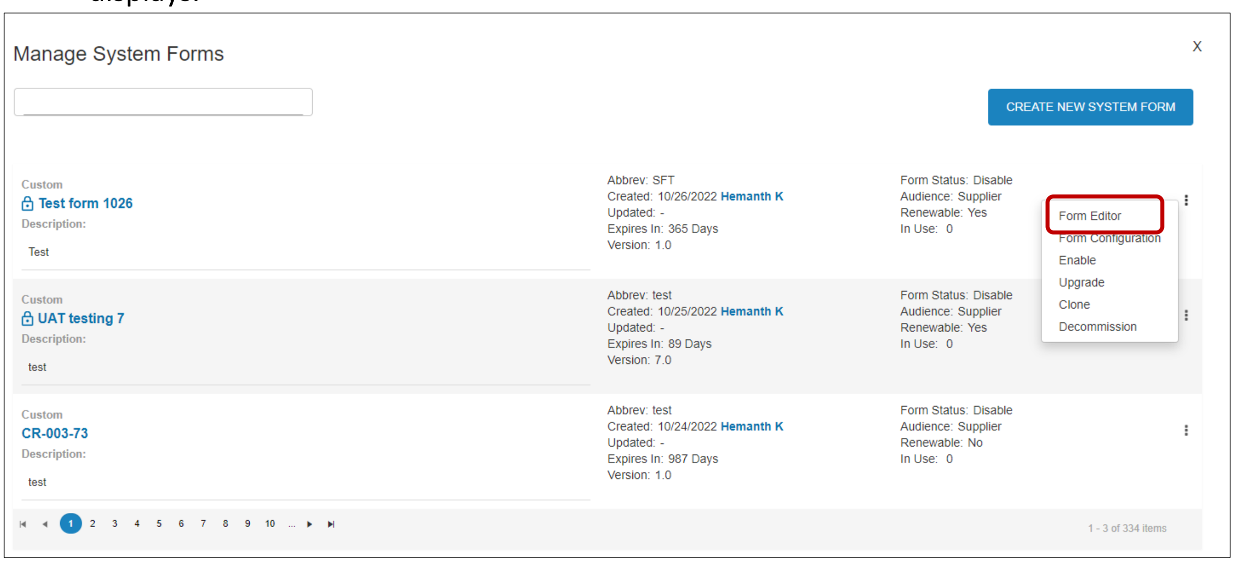
1. Place checkmarks next to the desired options:
    a. **Enable Expiration:** This allows you to set the number of days the form will be set to expire using the **Expire in (in days)** field.
    b. **Renewable:** This allows a Supplier to renew the form on their own.
    c. **Blocked Override:** This feature is client-specific, please ignore.
    d. **Enable 2FA:** This form will require 2FA enabled on a logged in user to access view/edit the form.
2. Click **Next.**



3. Click the **Next** button on the following tabs:
    a. **Data Mapping:** Used for another client to map data fields to an external database. Please ignore for now.
    b. **Conditional Rules:** This tab allows you to enable or disable required fields based on the values of other fields. For example, if X, then Y.
    c. **Summary:** A quick review of your title, description, and version, as well as a place to save the configuration.
4. Click **Save.**

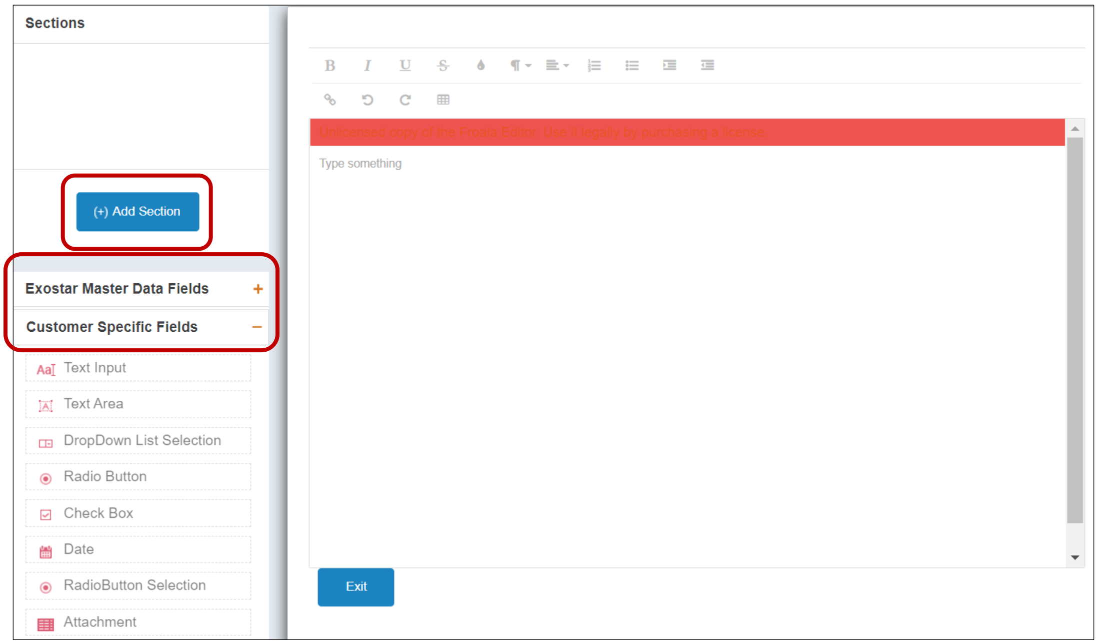


5. To start building the form, click on **Form Editor** when the **Manage System Forms** page displays.



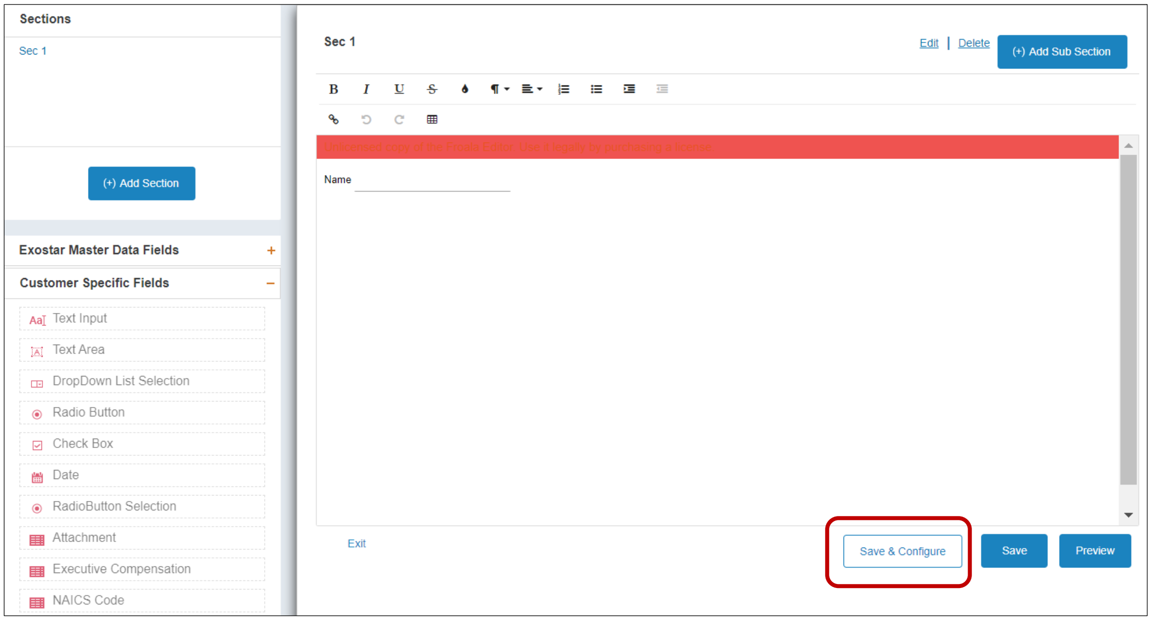
6. In the **Form Editor**, add sections and questions using the **+Add Section** button, **Master Data Fields** or **Custom** controls along the left-hand side of the screen.

NOTE: Master Data Fields pulls data from a master database for Supplier information and is auto populated so the Supplier does not have to enter the information. Custom data fields allows you to create your own custom questions and fields.

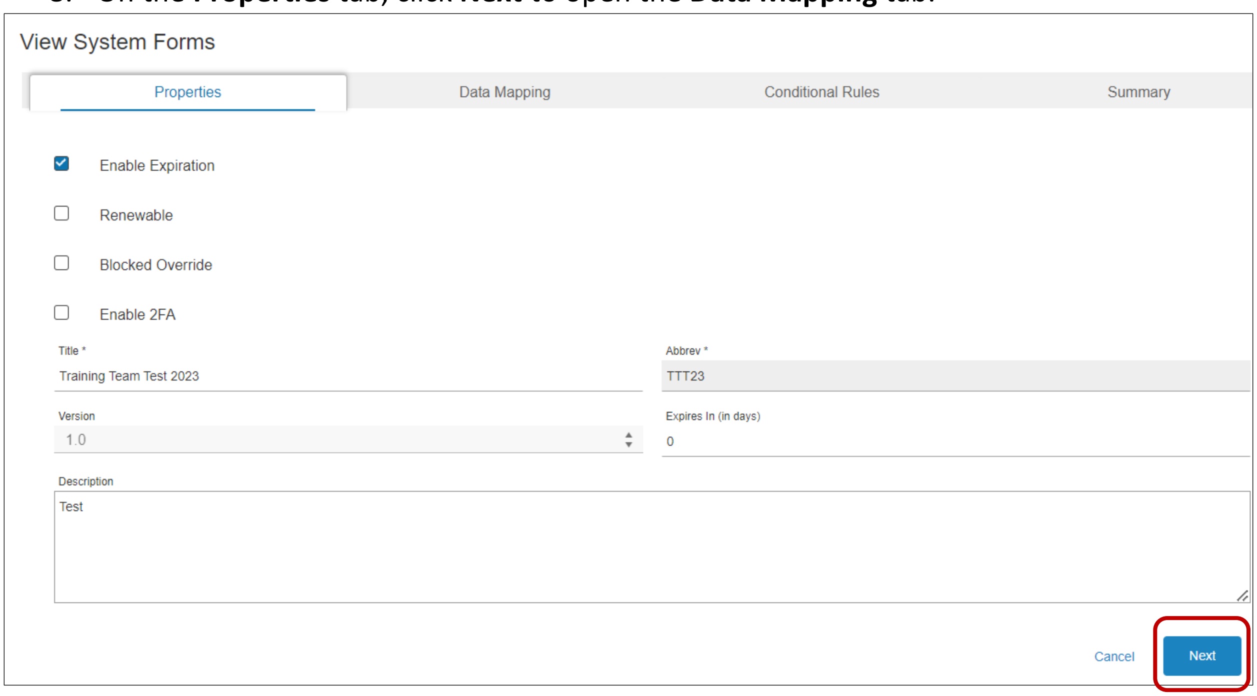


NOTE: Once you start adding sections, **Master Data Fields** or **Customer Specific Fields**, **Save & Configure, Save** and **Preview** buttons display in the bottom right corner of the form. Sections are like pages and sub-sections are like tabs on a page. We highly recommend creating sections and sub-sections, instead of the entire form being on a single page.

7. Once you add all desired sections, sub-sections, and fields, click **Save & Configure** to return to the **Properties** tab.

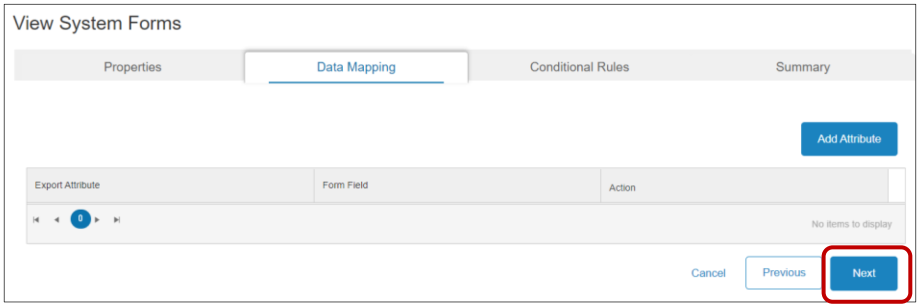


8. On the **Properties** tab, click **Next** to open the **Data Mapping** tab.



Step 3. Data Mapping

This is a client-specific tab, so click **Next** to continue to the **Conditional Rules** tab.

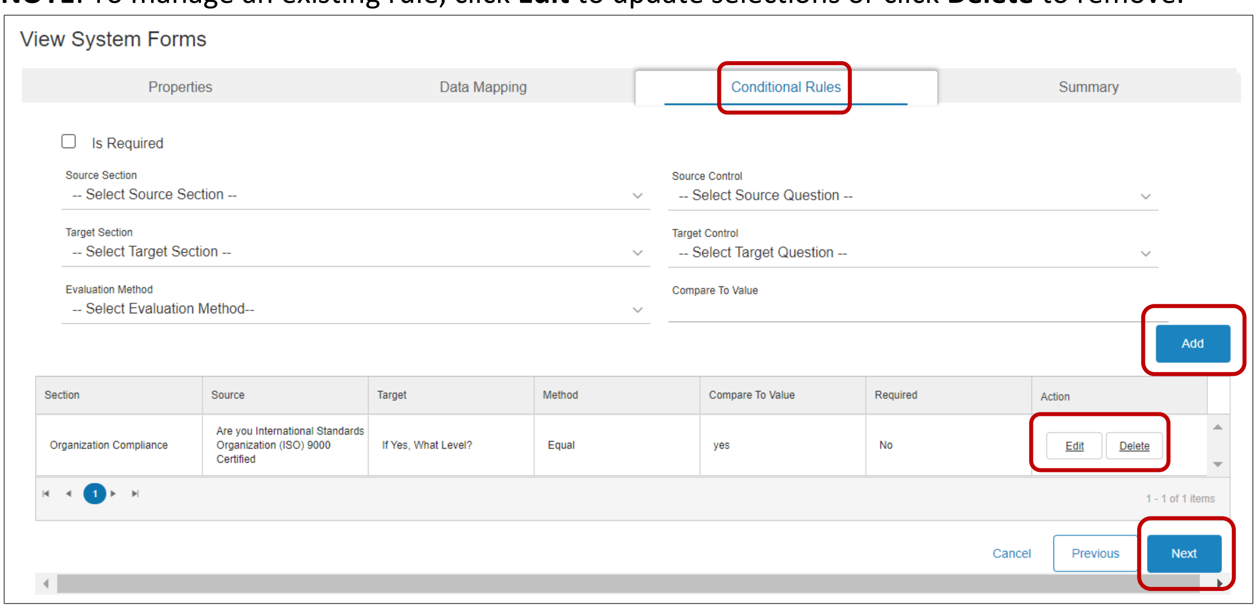


Step 4. Add Conditional Rules

The options that display in the drop-down menus on this tab, are pulled from the sections and questions you created in the Form Editor. To create a conditional rule:

1. Place a checkmark next to **Is Required** if you want the **Target Control** to be required if the **Source Evaluation** is **True**.
2. Select from the **Source Section** and **Source Control** drop-down menus.
3. Select from the **Target Section** and **Target Control** drop-down menus.
4. Choose what to compare Target Value to by first choosing the **Evaluation method** and then type in the value in **Compare To Value** field.
5. Click **Add** to create the rule. Click **Next** when all rules are added.

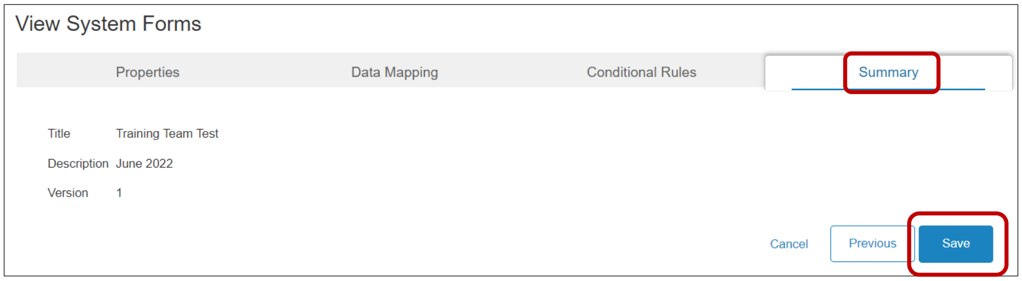
NOTE: To manage an existing rule, click **Edit** to update selections or click **Delete** to remove.



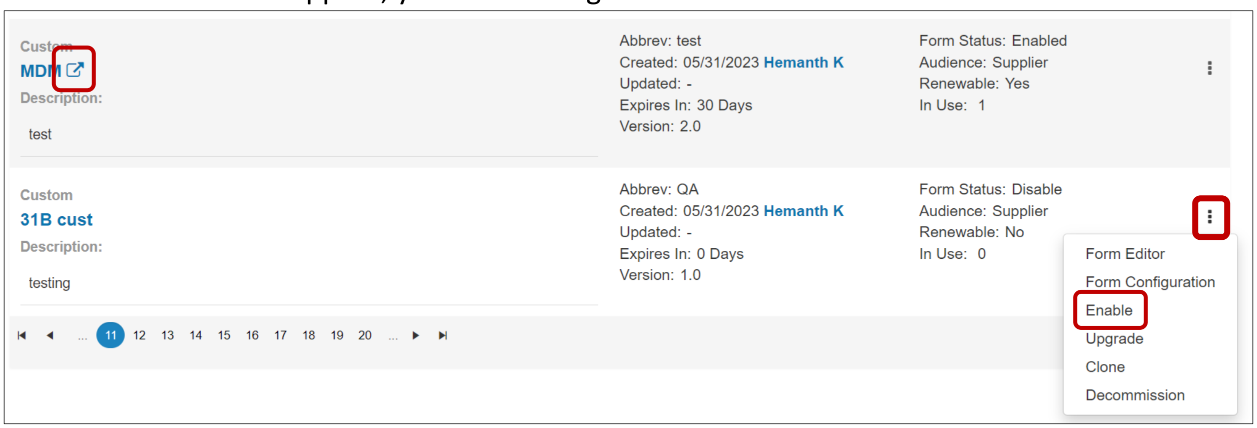
Step 5. Review Summary Tab

To complete the form creation process:

1. On the **Summary** tab, review all data input. Go back and make edits, if necessary.
2. Click **Save** to complete editing your form. The system takes you back to the **Manage System Forms** page.



NOTE: You can preview the form by clicking the arrow next to the **Form Name**. Once the form has been sent to the Supplier, you can no longer edit the form.



MANAGE SYSTEM FORMS

The Manage System Forms page provides a comprehensive list of forms, as well as the option to create a new form. Each row provides a snapshot of the specific form's details, as well as form management options via the ellipses, located to the far right of each form row. This drop-down menu's options depend on the current Form Status. Please see the possible options and their descriptions:

- **Form Editor**: This allows you to edit form sections, sub-sections, and fields.
- **Form Configuration**: This allows you to manage Form Properties and Conditional Rules.
- **Enable**: Only displays when the **Form Status** is **Disable**. Select this option to enable the form for use and to send out to Suppliers.
- **Disable**: Only displays when the **Form Status** is **Enabled**. Select this option to disable the form from use. Once disabled, the form can no longer be sent out to Suppliers.
- **Upgrade**: Only displays when the **Form Status** is **Disable**. You must create a new version of a form prior to taking this action. This option also allows you to make changes to an

existing form while auto updating the Supplier's form to view new changes while retaining existing information.

- **Clone**: This option allows you to create a copy of an existing form as a template for a new form, or to be used to update or upgrade an existing form with new fields.
- **Decommission**: This option allows you to remove it from the Manage System Forms screen and from being used again. Once this action is completed, the form can no longer be assigned. If the form is still in Supplier View, you may need to cancel the form in Form Requests.

NOTE: Once a form is sent to a Supplier, the only options that display are: Disable, Clone, and Decommission.

Enable/Disable Form

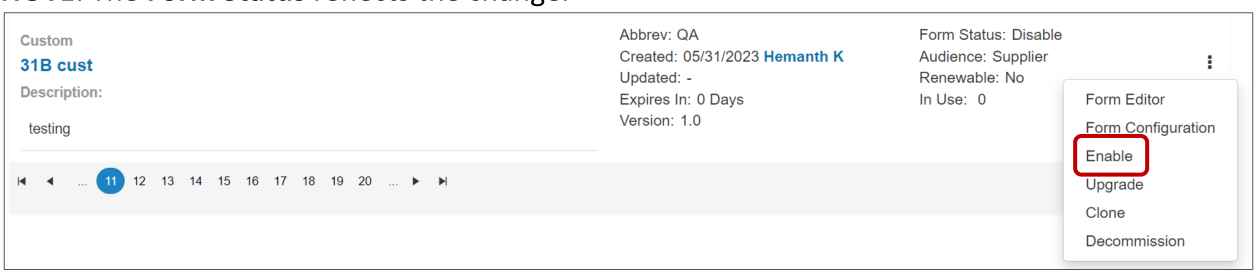
Enable: Only displays when the **Form Status** is **Disable**. Select this option to enable the form for use and to send out to Suppliers.

Disable: Only displays when the **Form Status** is **Enabled**. Select this option to disable the form from use. Once disabled, the form can no longer be sent out to Suppliers.

To enable or disable a form:

1. From the left-hand navigation, select **Form Life Cycle**.
2. Locate the desired form. Select **Enable** or **Disable** from the ellipses at the end of the row.

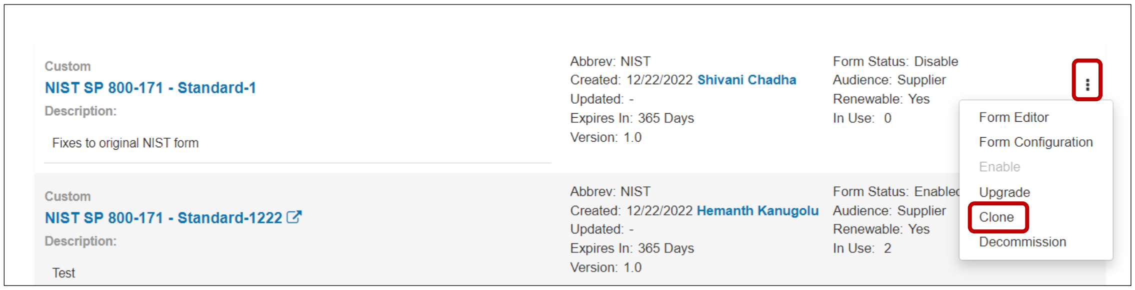
NOTE: The **Form Status** reflects the change.



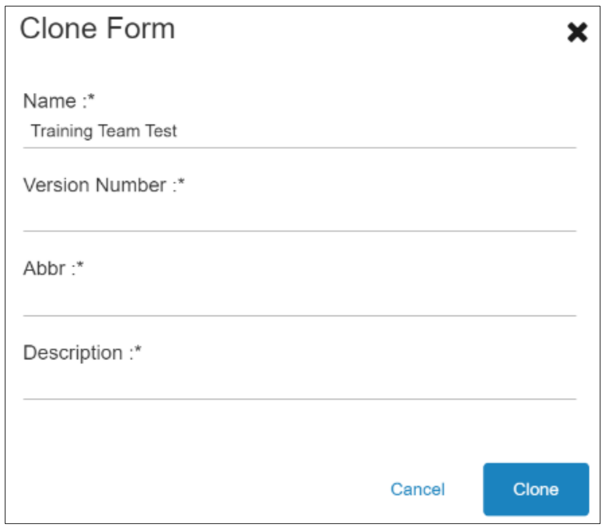
Clone Form

To clone an existing form:

1. From the left-hand navigation, select **Form Life Cycle**. Locate the desired form. Select **Clone** from the ellipses at the end of the row.



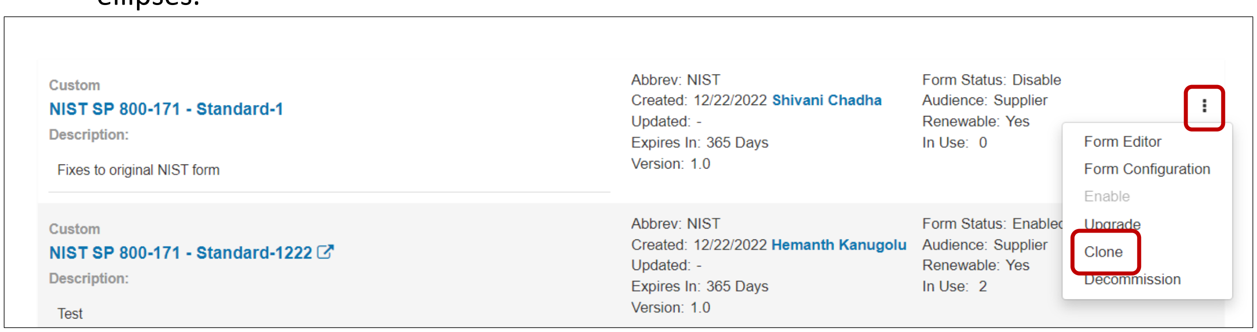
2. Update the **Form Name**. Add an **Abbreviation**, **Version Number** and **Description**. Click **Clone**.



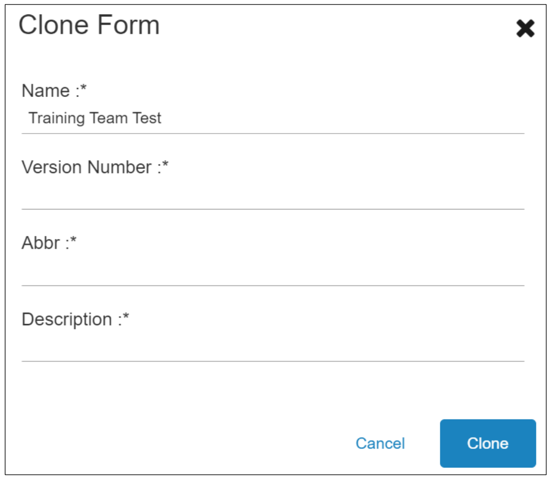
Upgrade Form

OBM provides the ability to upgrade a form from its current version to a newer version. Prior to upgrading the form, you must first create the new version. To upgrade a form:

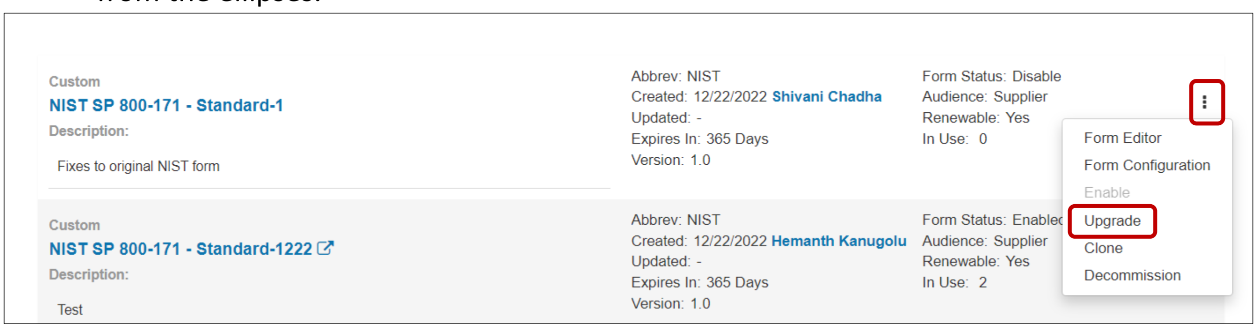
1. Navigate to the **Form Life Cycle** page. Locate the desired form. Select **Clone** from the ellipses.



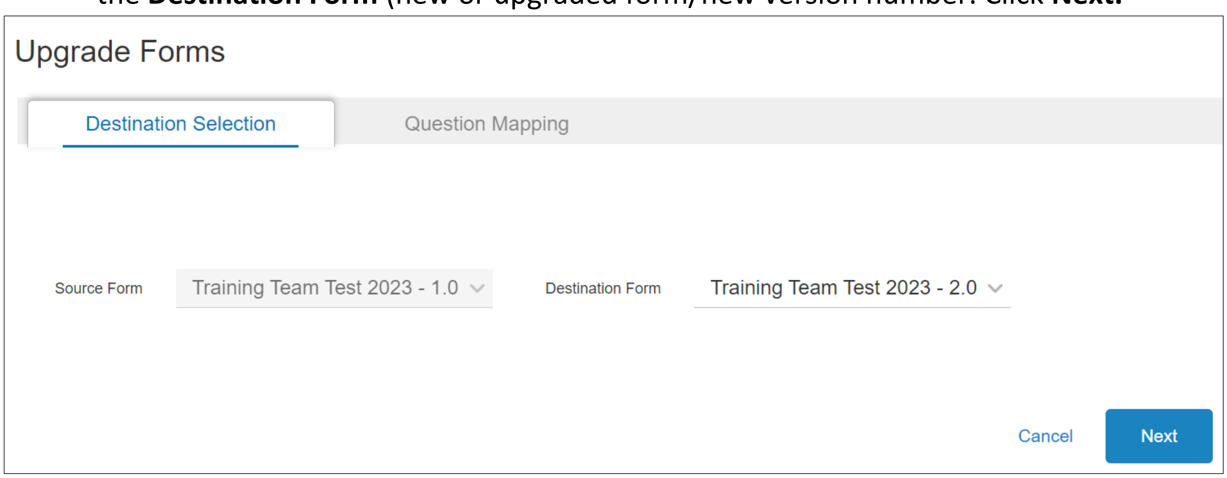
2. Ensure you leave the **Form Name** the same. Give a higher **Version Number** from the original form. Click **Clone**.



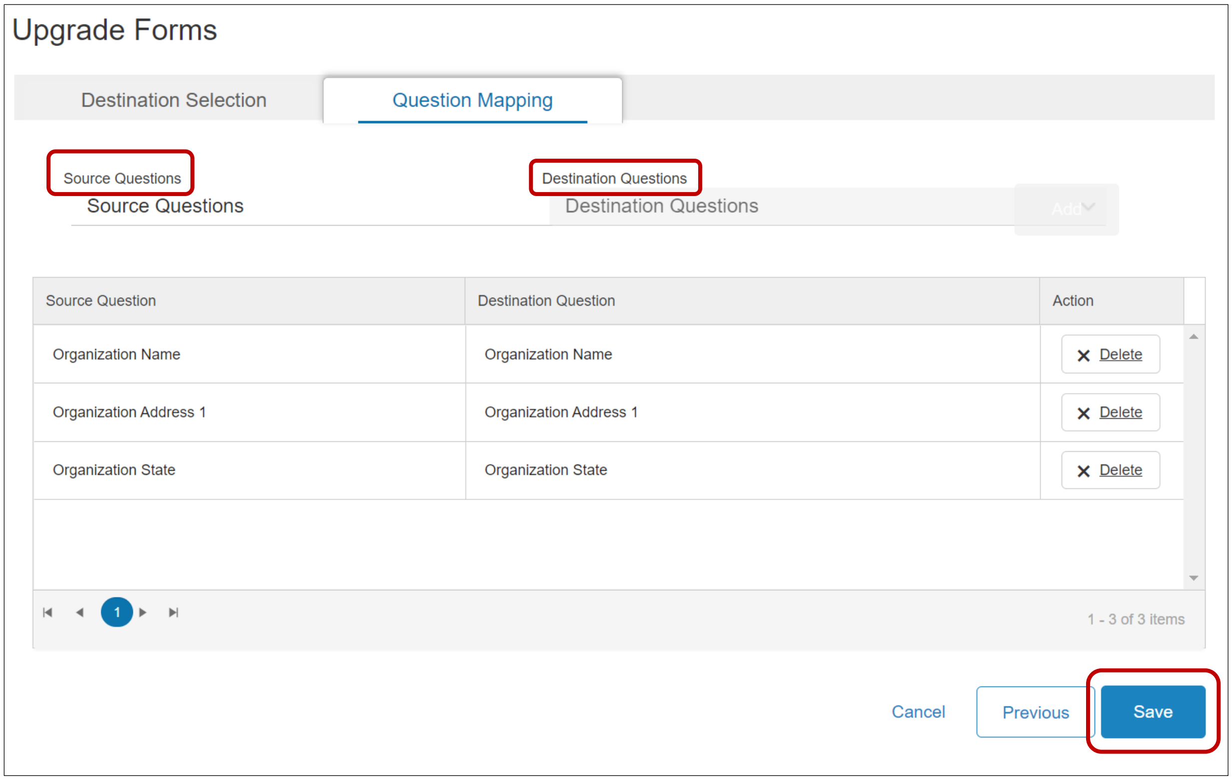
3. Make desired edits to cloned form. Ensure the **Form Status** for the form you want to upgrade is set to **Disable** and the newer version's status is set to **Enabled**. Select **Upgrade** from the ellipses.



4. On the **Upgrade Forms** page, select the **Source Form** (original/old version number). Select the **Destination Form** (new or upgraded form/new version number. Click **Next.**



5. The **Question Mapping** tab allows you to map original form questions to the upgraded version. To map questions, select the **Source Question** and the **Destination Questions**. Click **Add**. Once you map all fields, click **Save**.



NOTE: If a Supplier has an older version of the form, the system prompts them to upgrade when they try to edit it form.

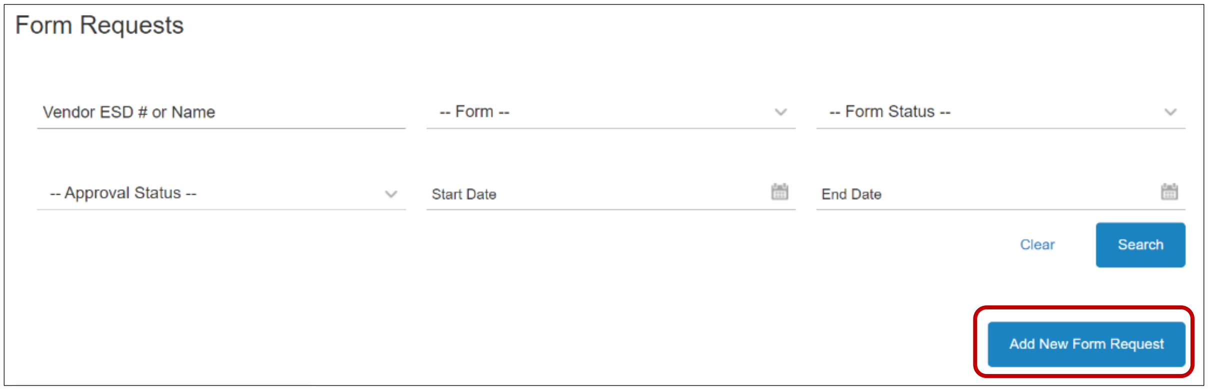
FORM ASSIGNMENTS

Functional Administrators can assign a single form to a single Supplier, multiple forms to a single Supplier, as well as a single form to multiple Suppliers. Functional Administrators can also reassign forms.

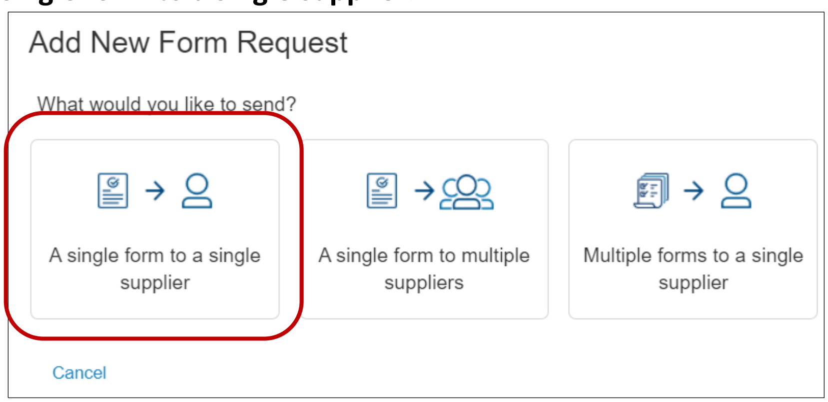
Assign Single Form to Single Supplier

To assign a single form to a single Supplier:

1. On the dashboard, click **Form Requests**. Click the **Add New Form Request** button.

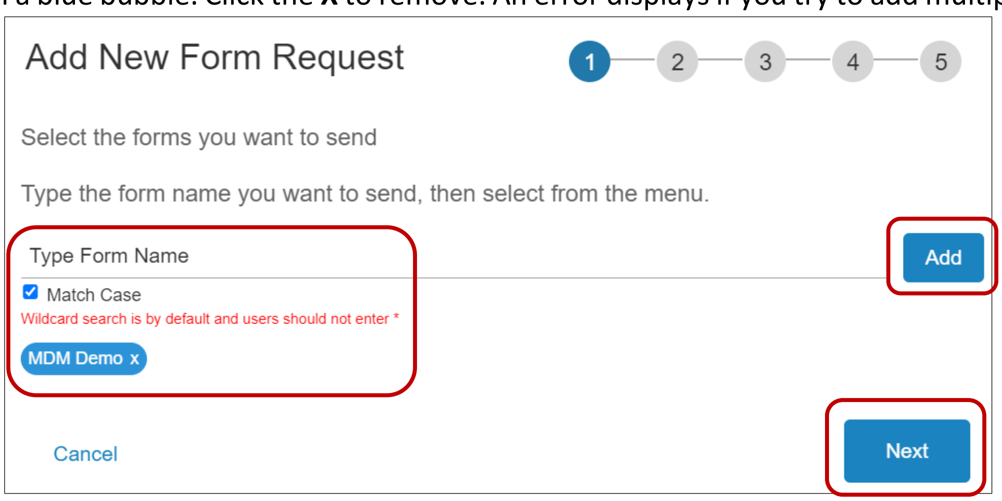


2. Select **A single form to a single supplier**.



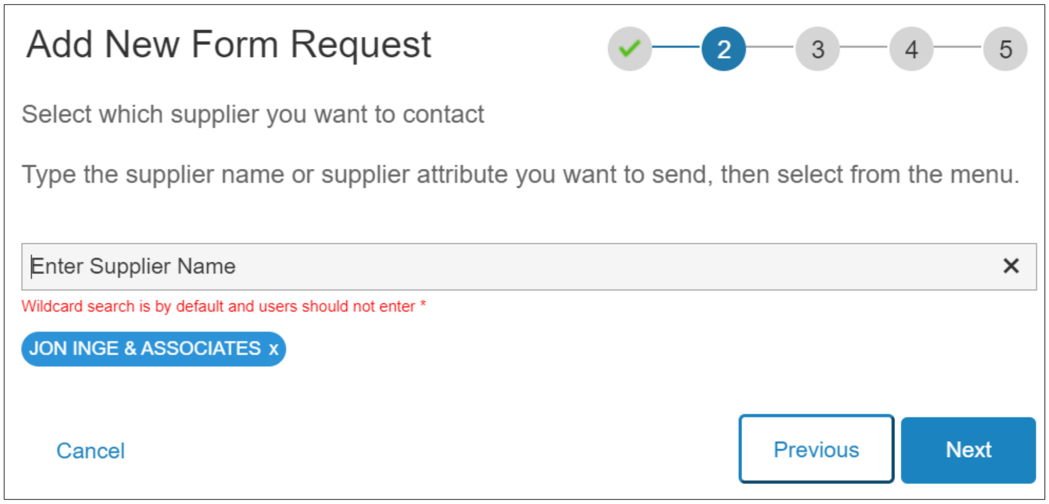
3. Type the desired form name. Click **Add**. Once you finish adding desired form, click **Next**.

NOTE: Place a checkmark next to **Match Case** for the field to be case-sensitive. The added form displays in a blue bubble. Click the **X** to remove. An error displays if you try to add multiple forms.

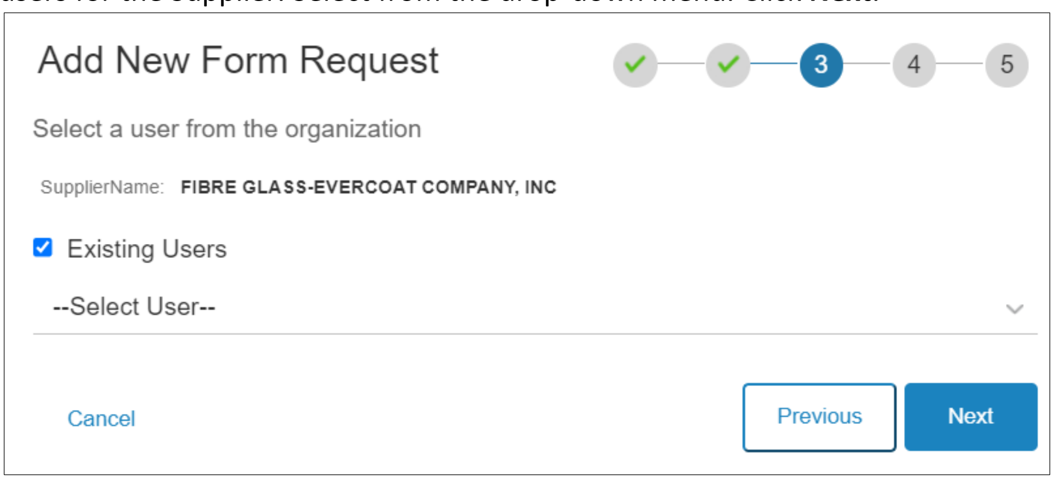


4. Enter the **Supplier Name**. Click the name when located in the search results box. Click **Next**.

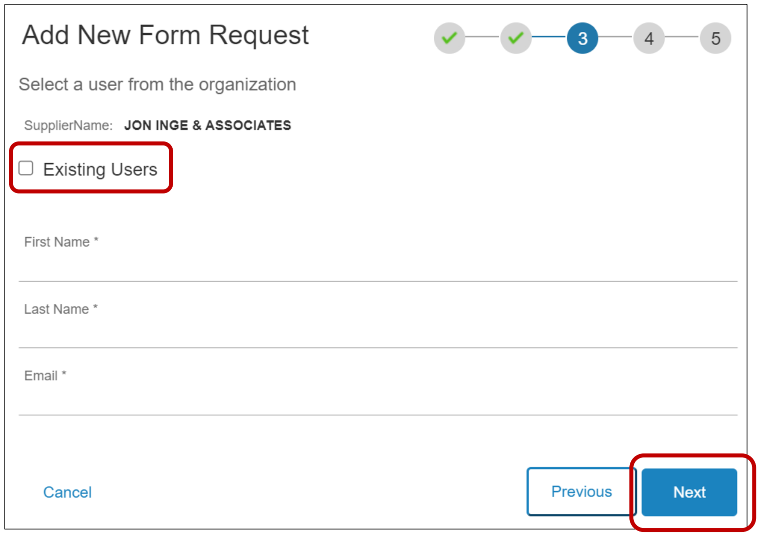
NOTE: The added Supplier displays in a blue bubble. Select the **X** to remove any unwanted Suppliers. An error displays if you try to add multiple Suppliers.



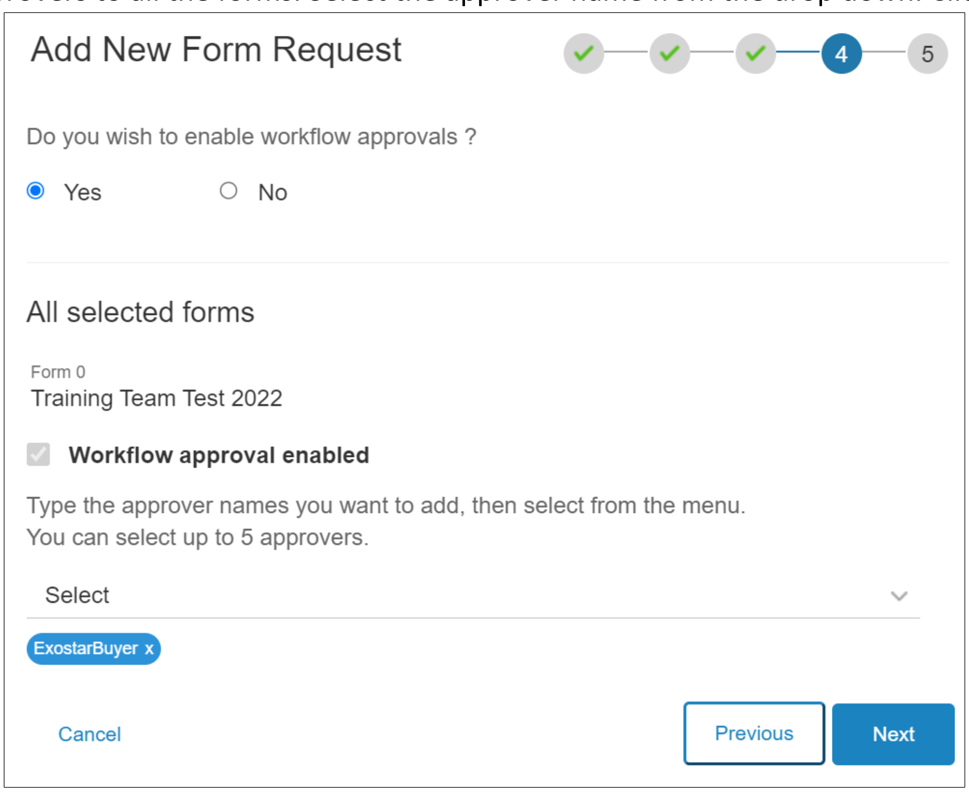
5. The **Existing User** checkbox is already selected and provides a drop-down of existing users for the Supplier. Select from the drop-down menu. Click **Next**.



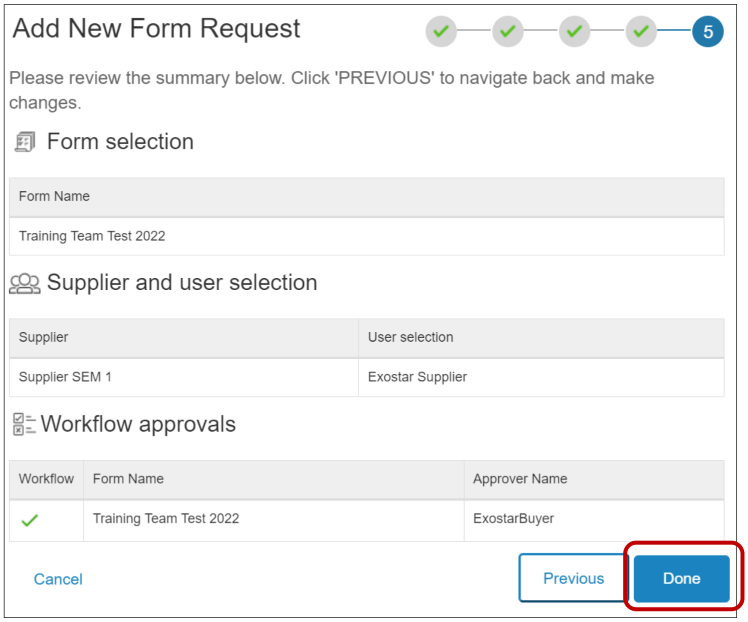
NOTE: Deselect the box to display new user fields. Input information. Click **Next**.



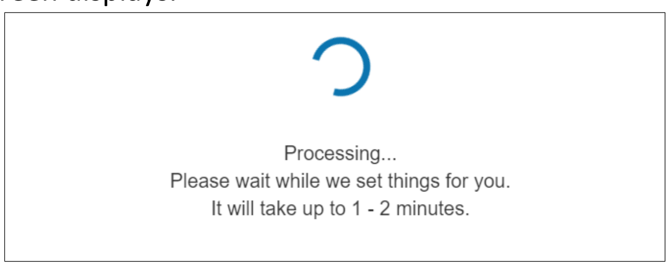
6. Select to enable or disable Buyer Workflow Approvals and assign Buyer Users as the approvers to the form. If **Yes** is selected, the admin has the option to assign the same approvers to all the forms. Select the approver name from the drop down. Click **Next**.



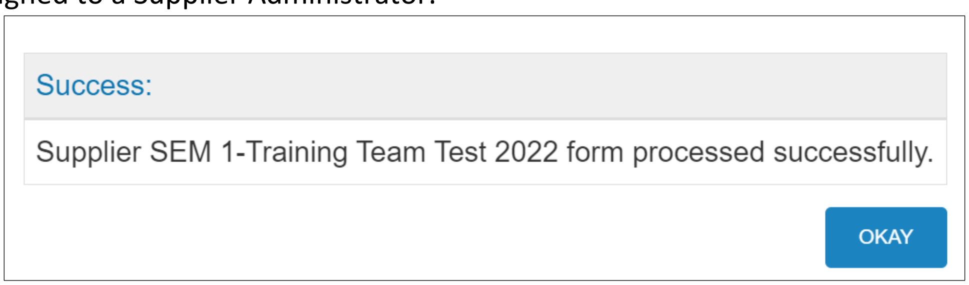
7. The system prompts you to review the summary. If you do not wish to make any changes, click **Done**.



NOTE: A processing screen displays.



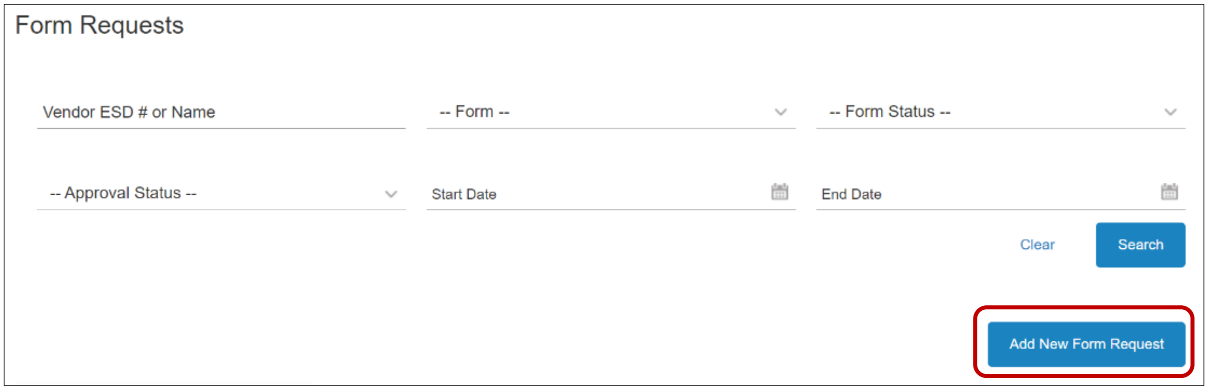
8. On the **Success** dialogue box, click **Okay**. At this point your form has been successfully assigned to a Supplier Administrator.



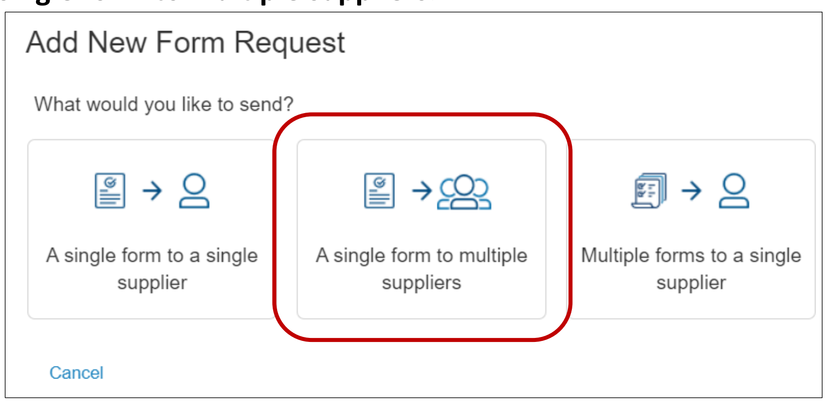
Assign Single Form to Multiple Suppliers

To assign a single form to multiple Suppliers:

1. On the dashboard, click **Form Requests**. Click the **Add New Form Request** button.

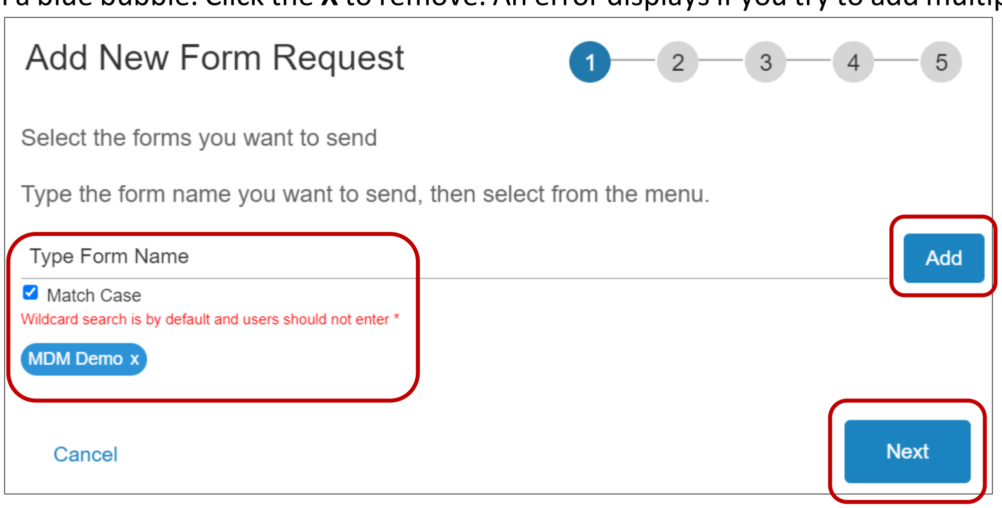


2. Select **A single form to multiple suppliers**.



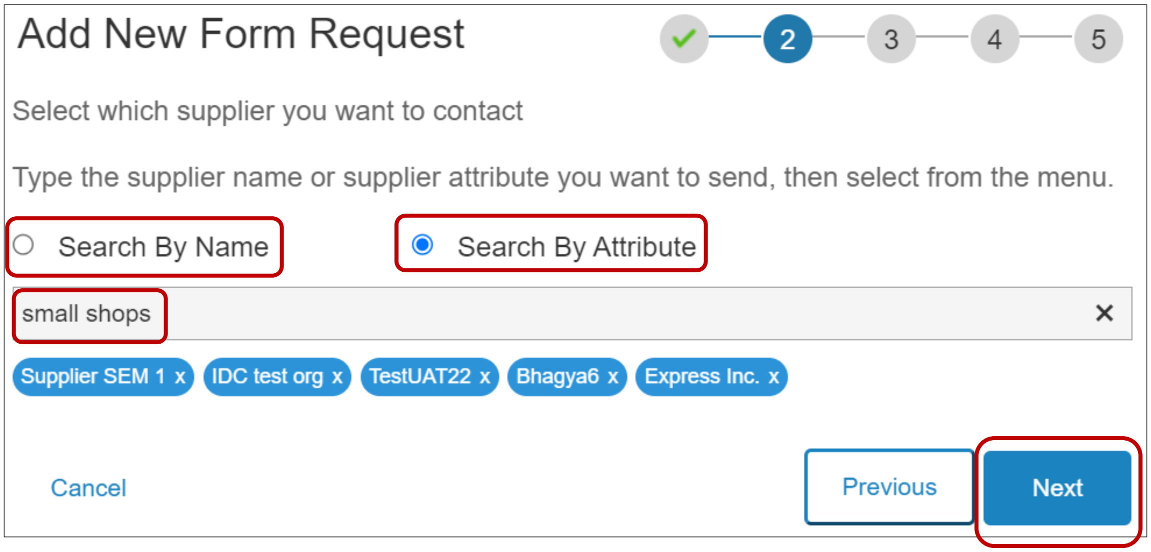
3. Type the desired form name. Click **Add**. Once you finish adding the desired form, click **Next**.

NOTE: Place a checkmark next to **Match Case** for the field to be case-sensitive. The added form displays in a blue bubble. Click the **X** to remove. An error displays if you try to add multiple forms.



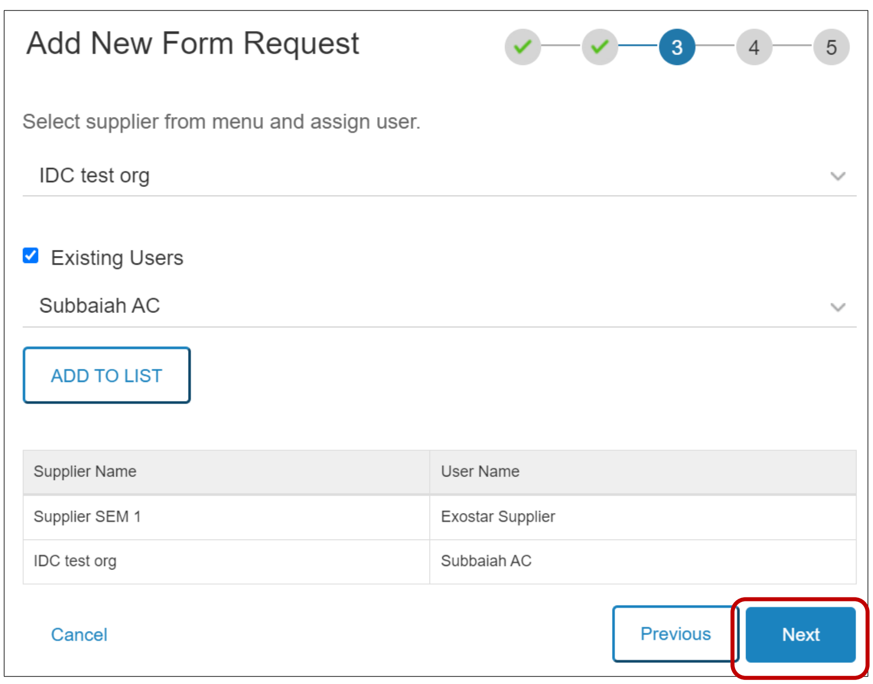
4. Select to **Search By Name** or **Search By Attribute**, which are like groups of suppliers that can be configured in General Settings. Enter the **Name**. Click the name when located in the search results box. Complete this process as many times as necessary. Once all Suppliers are added, click **Next**.

NOTE: The added Suppliers displays in a blue bubble. Select the **X** to remove any unwanted Suppliers.

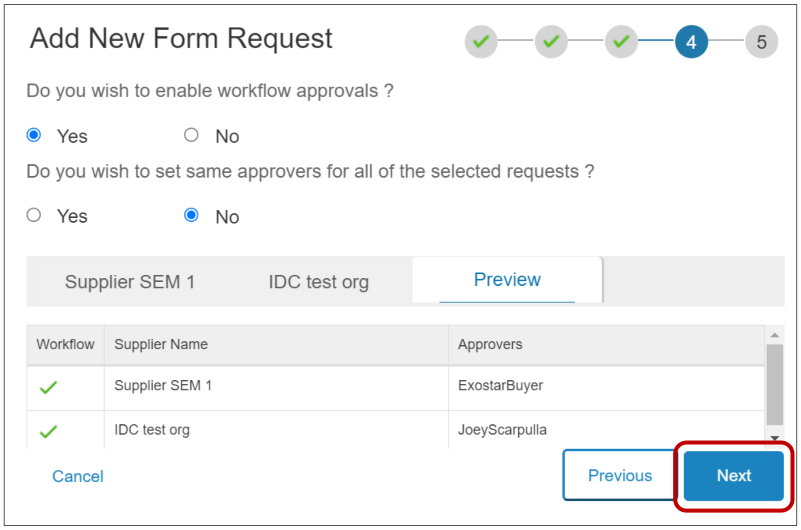


5. Select a Supplier and an assigned User for each Supplier. Click **Next**.

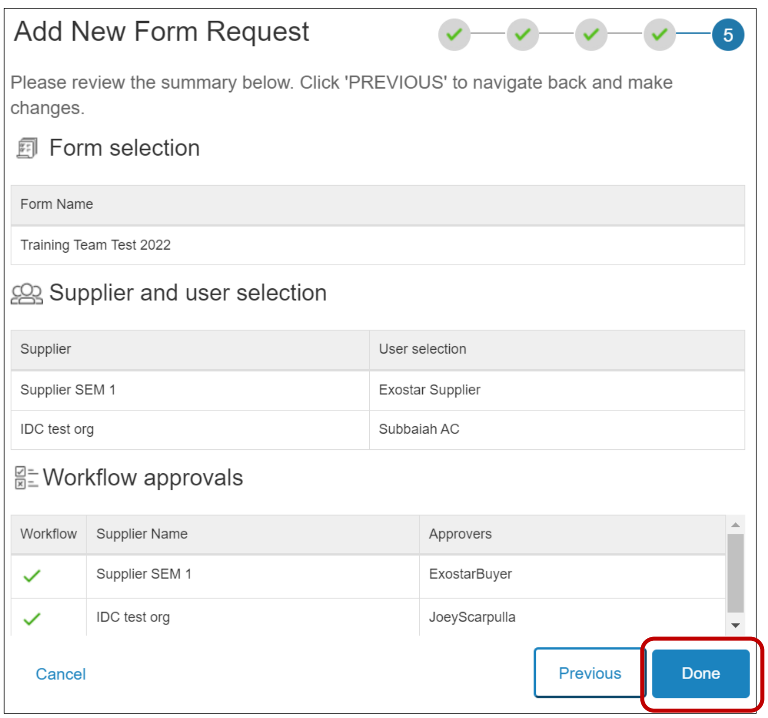
NOTE: **Existing Users** is automatically checked. Remove the checkmark to add a new user for that specific Supplier.



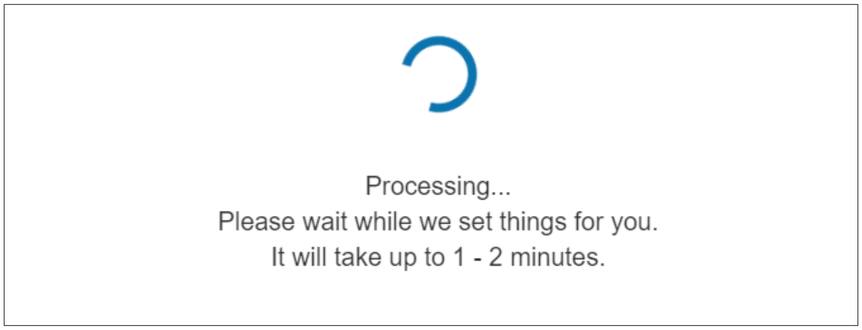
6. Select to enable or disable Buyer Workflow Approvals and assign Buyer Users as the approvers to the form. If **Yes** is selected, the admin has the option to assign the same approvers to all the forms. If **No**, the admin has the option to assign different users in each Supplier tab. Select the approver name from the drop down. Click **Next.**



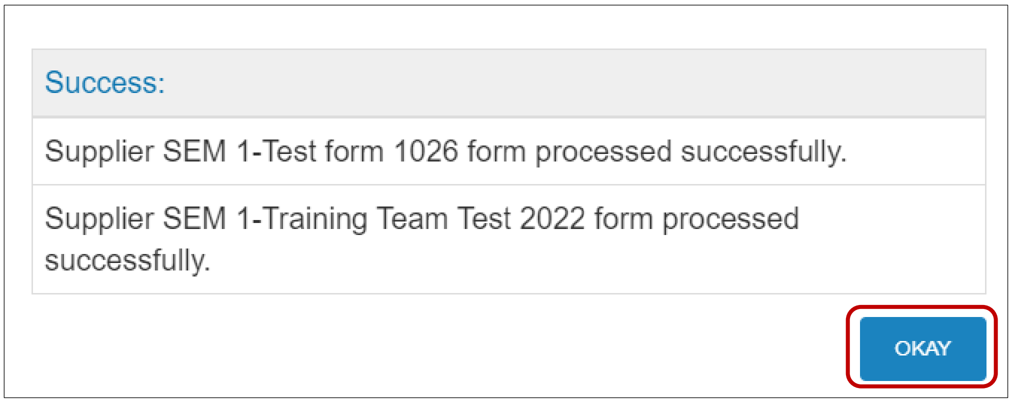
7. The system will prompt you to review the summary. If you do not wish to make any changes, click **Done.**



NOTE: A processing screen displays.



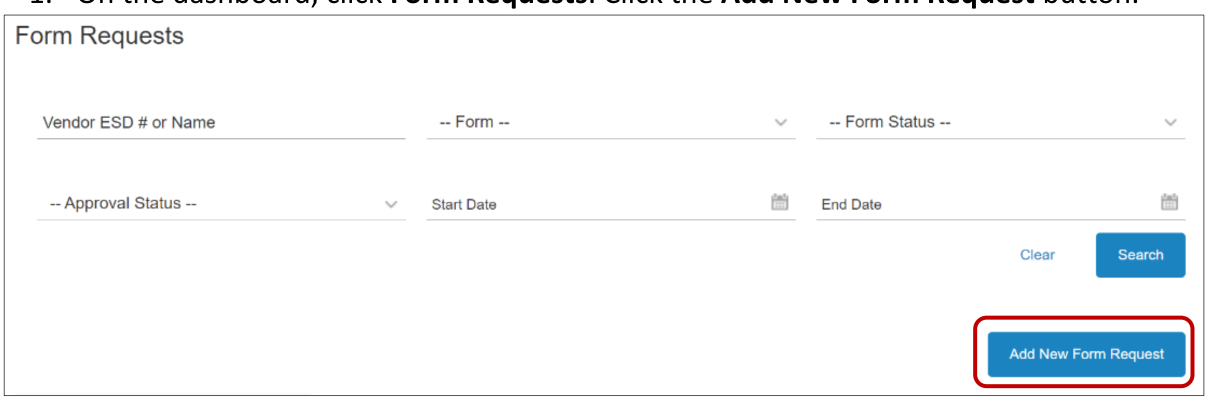
8. On the **Success** dialogue box, click **Okay**. At this point your form has been successfully assigned to a Supplier Administrator.



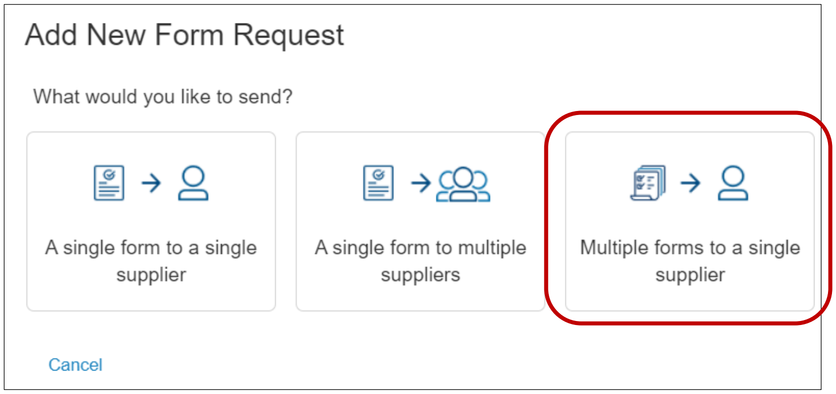
Assign Multiple Forms to Single Supplier

To assign multiple forms to a single Supplier:

1. On the dashboard, click **Form Requests**. Click the **Add New Form Request** button.

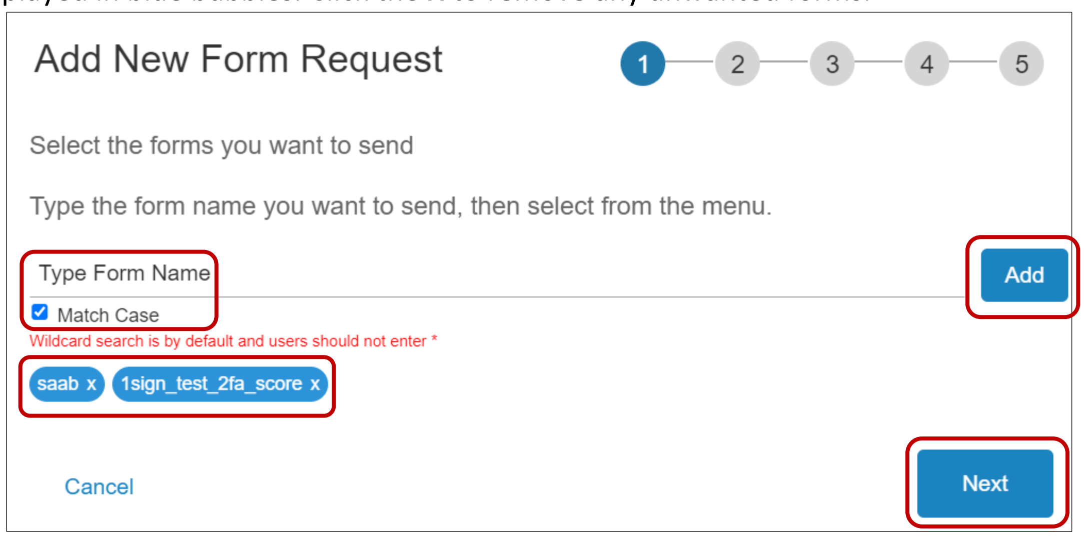


2. Select **Multiple forms to a single supplier**.



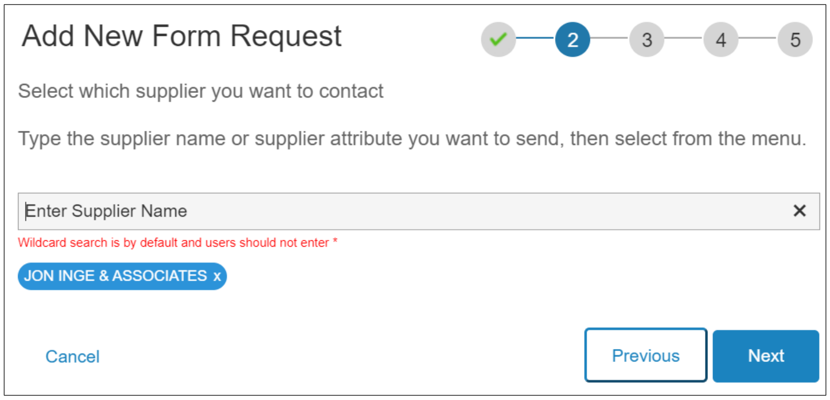
3. Type the desired form name. Click **Add**. Once you finish adding the desired form, click **Next**.

NOTE: Place a checkmark next to **Match Case** for the field to be case-sensitive. The added forms are displayed in blue bubbles. Click the **X** to remove any unwanted forms.

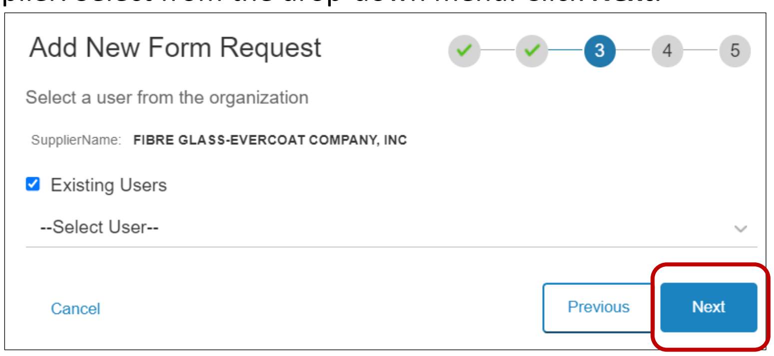


4. Enter the **Supplier Name**. Click the name when located in the search results box. Click **Next**.

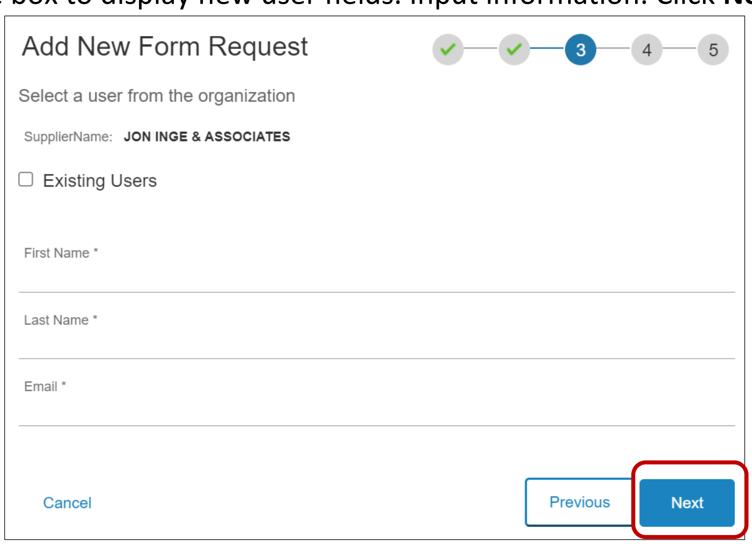
NOTE: The added Supplier displays in a blue bubble. Select the **X** to remove any unwanted Suppliers. An error displays if you try to add multiple Suppliers.



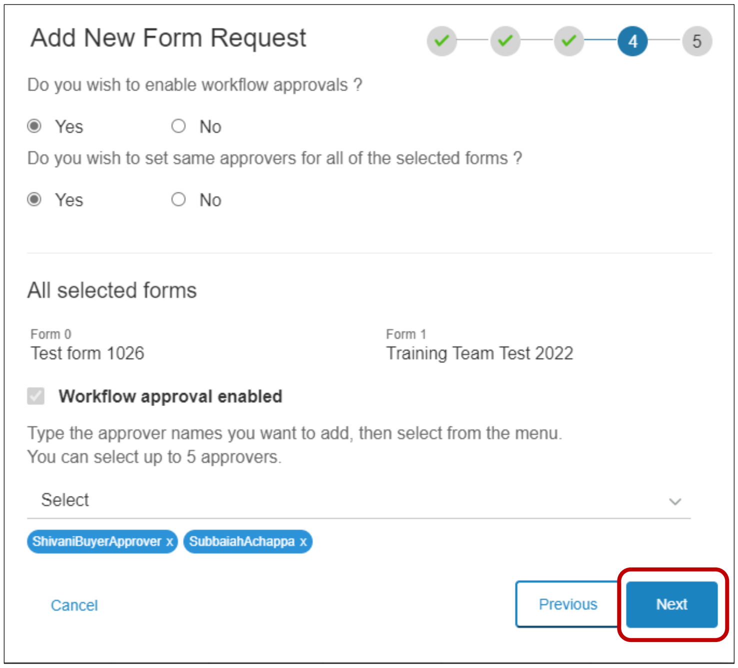
5. The **Existing User** checkbox is already selected and provides a drop-down of existing users for the Supplier. Select from the drop-down menu. Click **Next**.



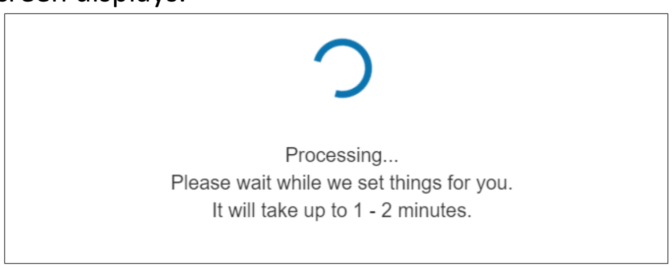
NOTE: Deselect the box to display new user fields. Input information. Click **Next**.



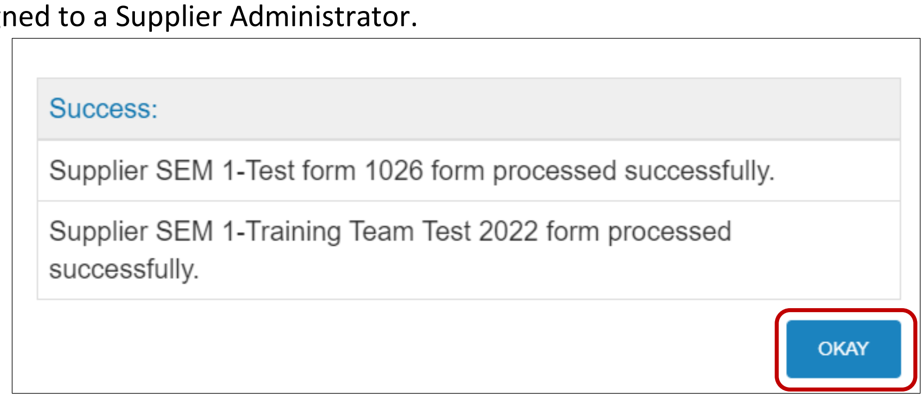
6. Select to enable or disable Buyer Workflow Approvals and assign Buyer Users as the approvers to the form. If **Yes** is selected, the admin has the option to assign the same approvers to all the forms. Select the approver name from the drop down. Click **Next**.



NOTE: A processing screen displays.



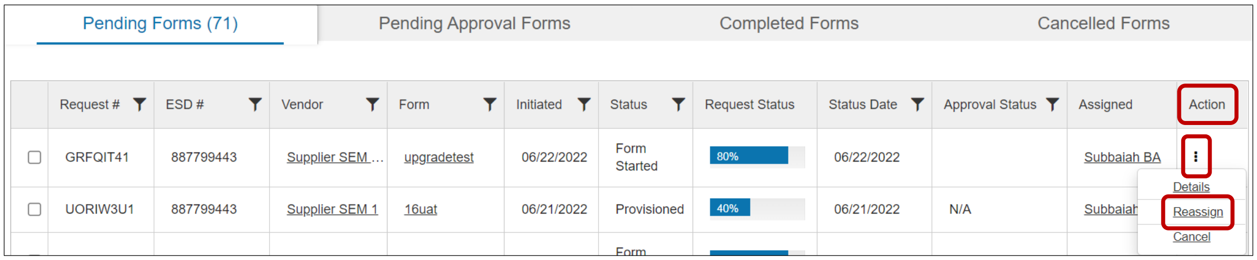
7. On the **Success** dialogue box, click **Okay**. At this point your form has been successfully assigned to a Supplier Administrator.



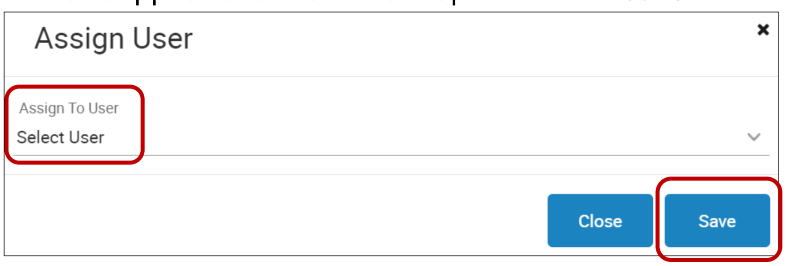
Reassign Form

Please note, only Functional Administrators can reassign a Supplier User from the Buyer role. To reassign a pending form:

1. On the dashboard, click **Form Requests**. On the **Pending Forms** tab, locate the desired form and select the ellipses in the **Action** column. Click **Reassign**.



2. Select the desired Supplier User from the dropdown. Click **Save**.

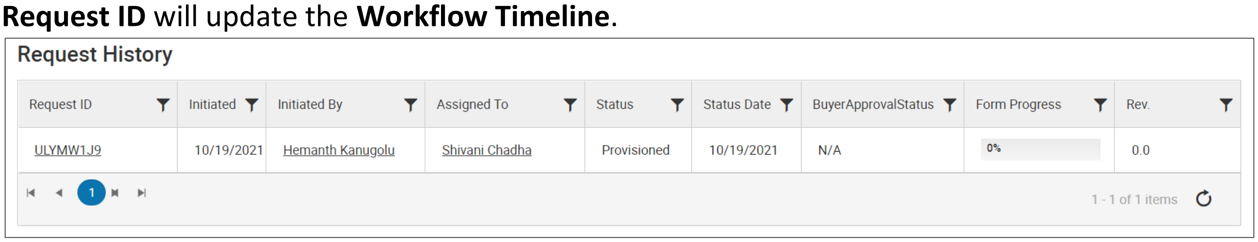


Form Details Page

Select any **Form Name** in the system to open the individual **Form Details** page. This page provides form management options, outlined below.

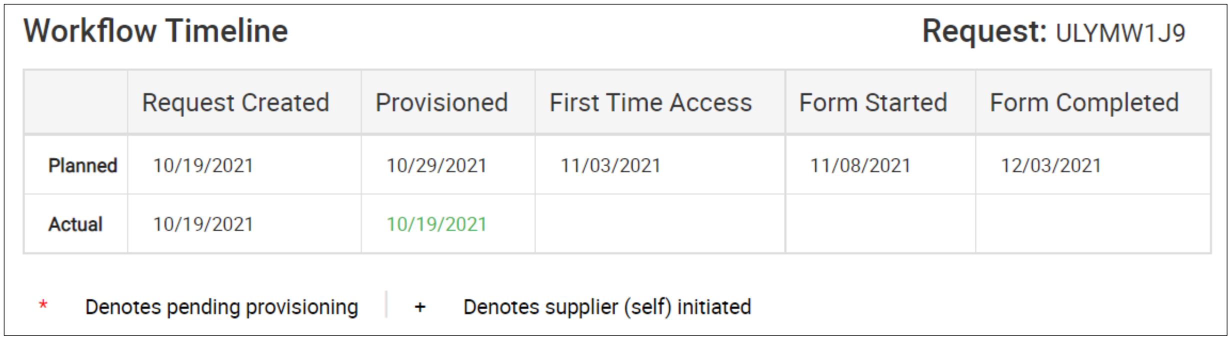
Request History

The request history outlines details for each form request of the form previously sent to the supplier organization. Please note, all underlined information is clickable, and clicking the **Request ID** will update the **Workflow Timeline**.



Workflow Timeline

This section outlines the workflow details for the specific form.



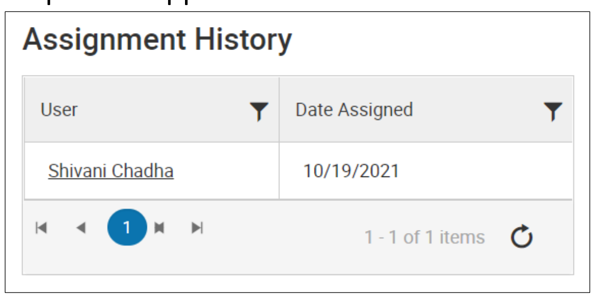
Workflow Timeline **Request:** ULYMW1J9

	Request Created	Provisioned	First Time Access	Form Started	Form Completed
Planned	10/19/2021	10/29/2021	11/03/2021	11/08/2021	12/03/2021
Actual	10/19/2021	10/19/2021			

* Denotes pending provisioning | + Denotes supplier (self) initiated

Assignment History

The assignment history table outlines user information and dates for each instance the form was assigned or reassigned to a specific supplier user.



Assignment History

User	Date Assigned
Shivani Chadha	10/19/2021

1 - 1 of 1 items

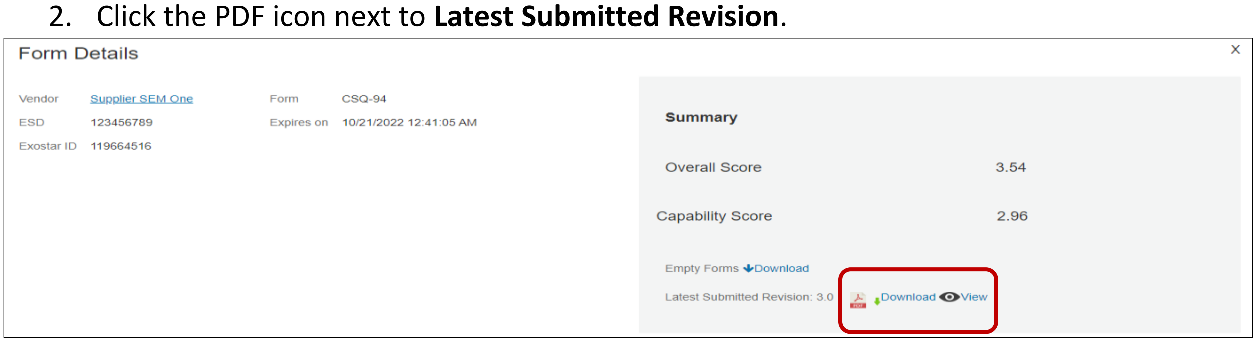
Print Forms

Functional/Technical Administrators can only see and download forms, whether completed or in progress.

Print Last Submitted Forms

To print the last submitted form:

1. Navigate to the desired **Form Details** page and locate the **Downloads** section.
2. Click the PDF icon next to **Latest Submitted Revision**.

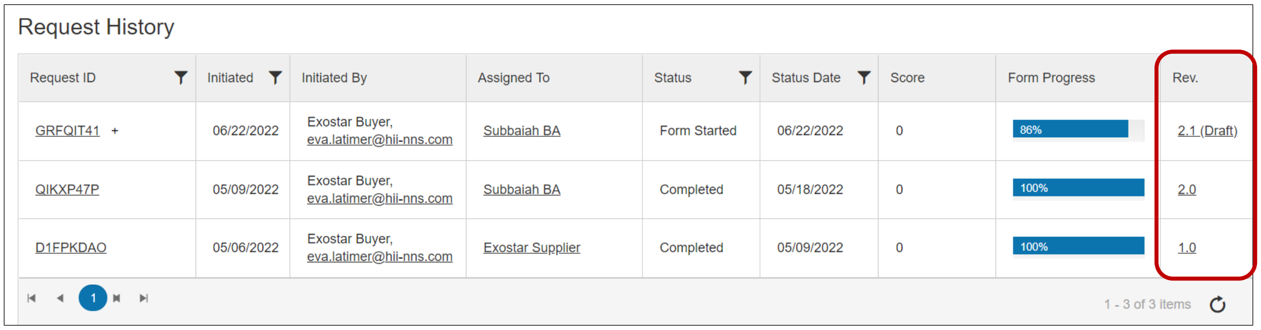


3. Select the **Print** option and follow your system's print process.

Print Older Form Version

To view and print older revisions of the form:

1. Go to the **Rev.** column of the **Revision History** table and click the revision number link of any form to download.



Request History

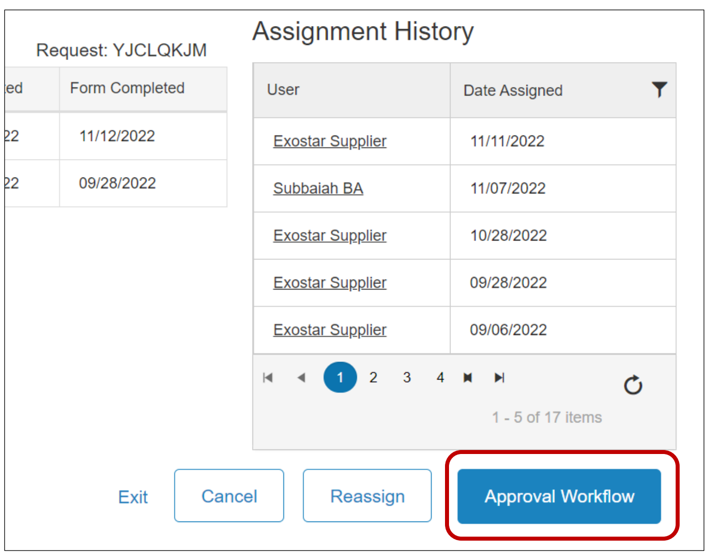
Request ID	Initiated	Initiated By	Assigned To	Status	Status Date	Score	Form Progress	Rev.
GRFQIT41 +	06/22/2022	Exostar Buyer, eva.latimer@hii-nns.com	Subbaiah BA	Form Started	06/22/2022	0	86%	2.1 (Draft)
QIKXP47P	05/09/2022	Exostar Buyer, eva.latimer@hii-nns.com	Subbaiah BA	Completed	05/18/2022	0	100%	2.0
D1FPKDAO	05/06/2022	Exostar Buyer, eva.latimer@hii-nns.com	Exostar Supplier	Completed	05/09/2022	0	100%	1.0

2. Select the **Print** option.

Approval Workflow

If a form is still Pending, Approval Workflow can be enabled or disabled, and users can be added, removed, or changed from the workflow via the Form Details page. To update the Approval Workflow settings:

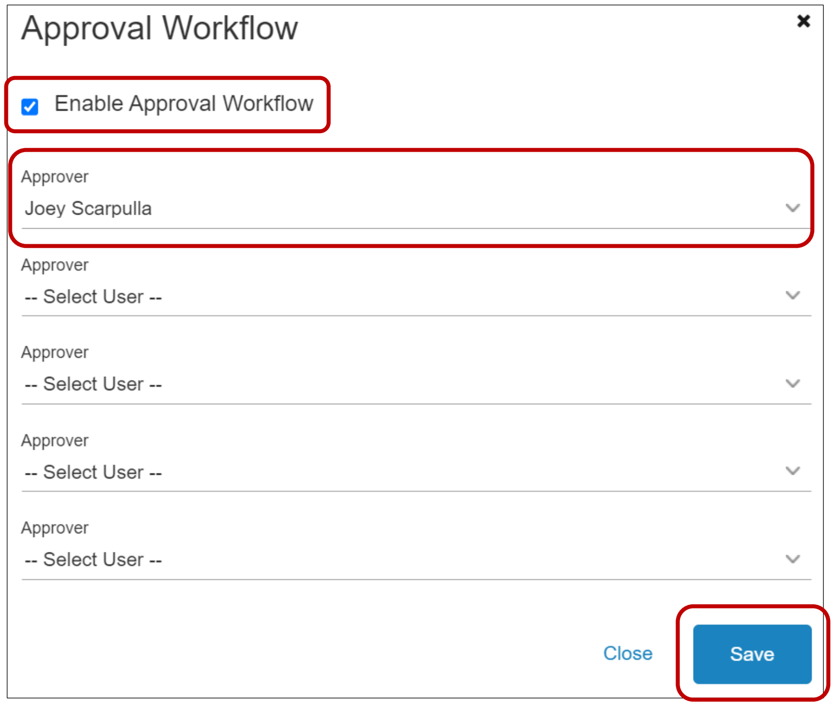
1. Navigate to the **Form Details** page of the desired pending form. Select the **Approval Workflow** button.



ed	Form Completed
22	11/12/2022
22	09/28/2022

User	Date Assigned
Exostar Supplier	11/11/2022
Subbaiah BA	11/07/2022
Exostar Supplier	10/28/2022
Exostar Supplier	09/28/2022
Exostar Supplier	09/06/2022

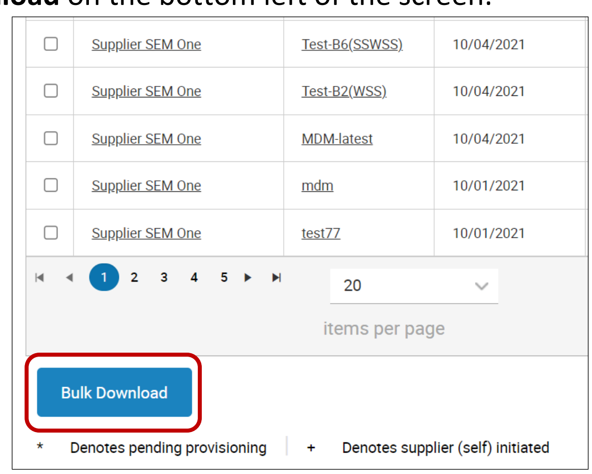
2. Place a checkmark to enable or remove the checkmark to disable. If desired, update the **Approver** selections. Click the **Save** button to complete.



BULK DOWNLOAD COMPLETED FORMS

Functional/Technical Administrators can also bulk download Completed Forms. To bulk download forms:

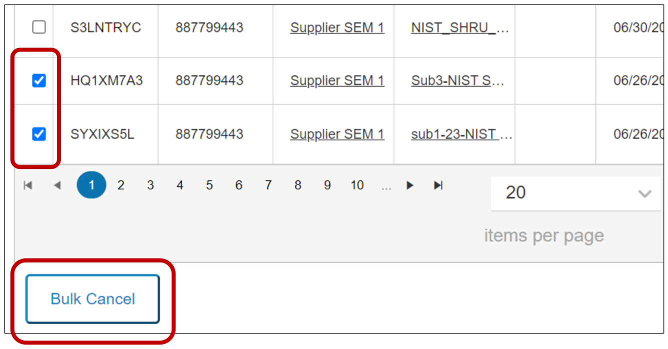
1. From the Dashboard, click **Form Requests**.
2. Go to the **Completed Forms** tab. Place checkmarks next to all desired forms.
3. Select **Bulk Download** on the bottom left of the screen.



Bulk Cancel Forms

Functional/Technical Administrators can also bulk download Completed Forms. To bulk download forms:

1. From the Dashboard, click **Form Requests**.
2. Go to the **Pending Forms** tab. Place checkmarks next to all desired forms.
3. Select **Bulk Cancel** on the bottom left of the screen.

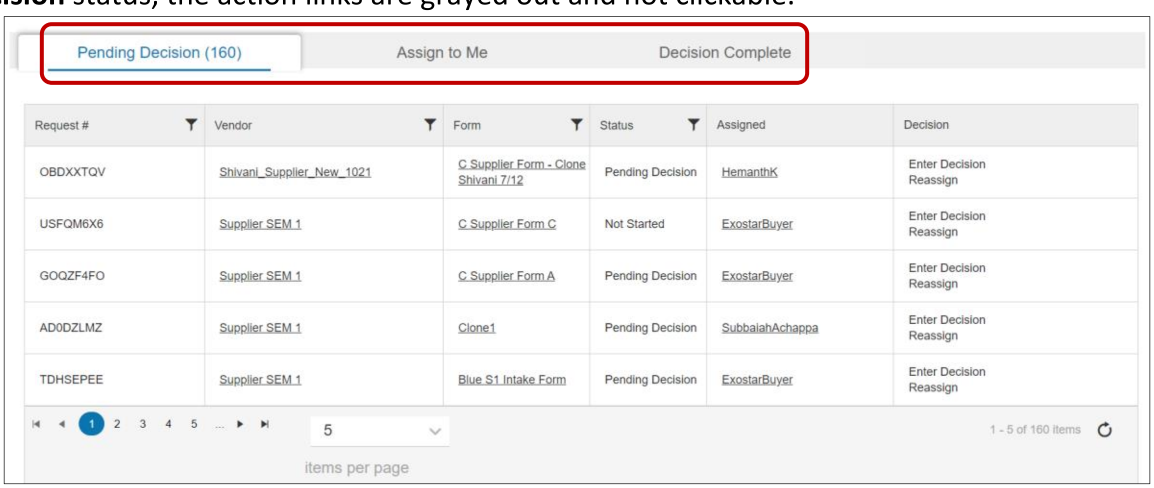


Approval Decision

This page is available to Functional Administrators. It displays forms with the approval workflow enabled, which is selected during the form creation process. There is a search feature at the top of the screen and below that, the following tabs are provided:

- **Pending Decision**: Provides a comprehensive list of all forms which are Pending Decision for the Buyer Approval Workflow, which is enabled during the form submission process.
- **Assigned to Me**: Provides a list of forms assigned to you to enter decision.
- **Decision Complete**: Provides a list of forms for which decision is complete (approved or rejected.

IMPORTANT! Unless a form is assigned to you for an approval decision and has a **Pending Decision** status, the action links are grayed out and not clickable.

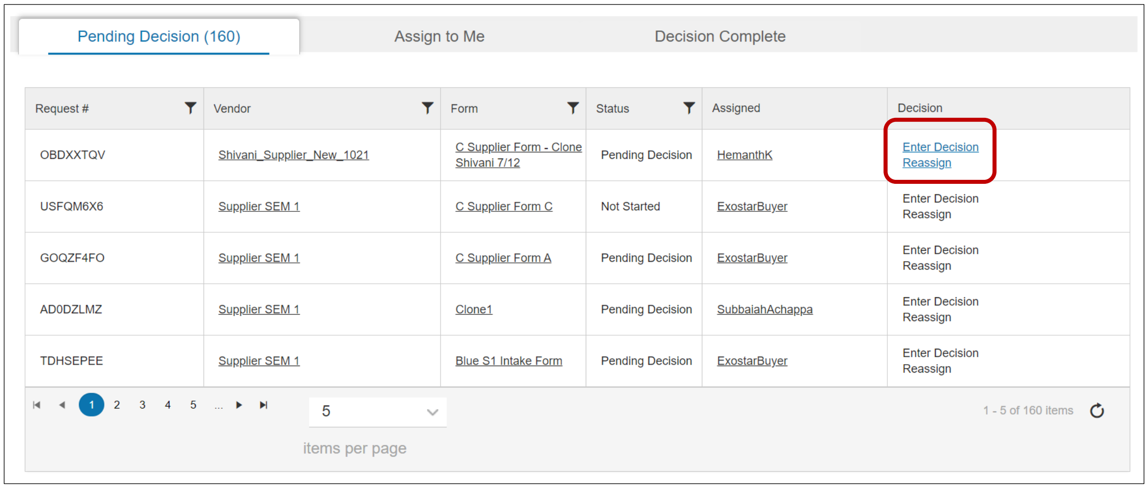


Approve Form

To approve a form:

1. Select **Approval Decision** from the left-hand menu.
2. Locate the desired form. Click the **Enter Decision** link.

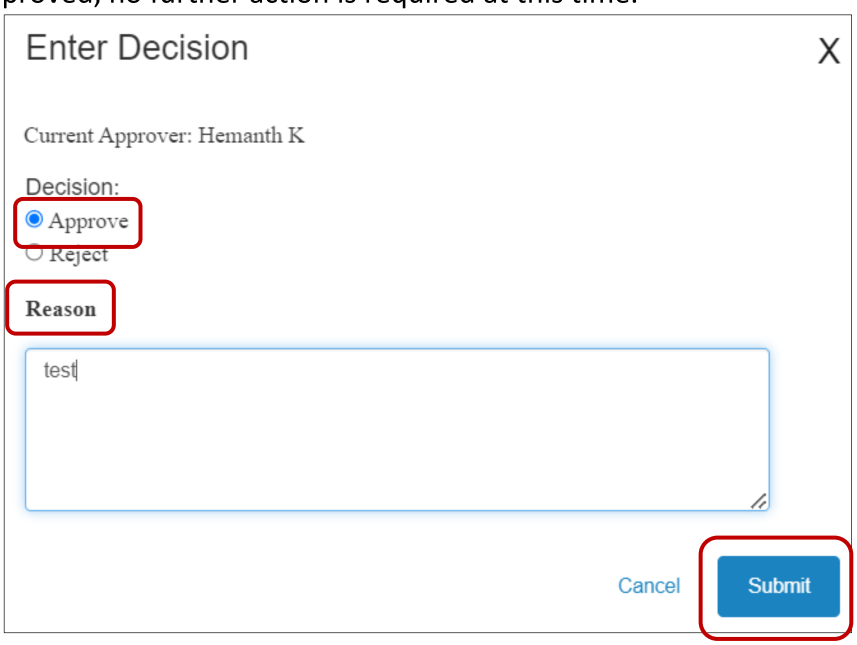
NOTE: If **Approval Decision** has been assigned to you, the form displays in both the **Pending Decision** tab and the **Assign to Me** tab.



NOTE: You can select the **Reassign** link to reassign Buyer Approvers.

3. Select the **Approve** radio button. Enter **Approval Reason**. Click **Submit** to move the form to the Decision Complete tab.

NOTE: Once approved, no further action is required at this time.

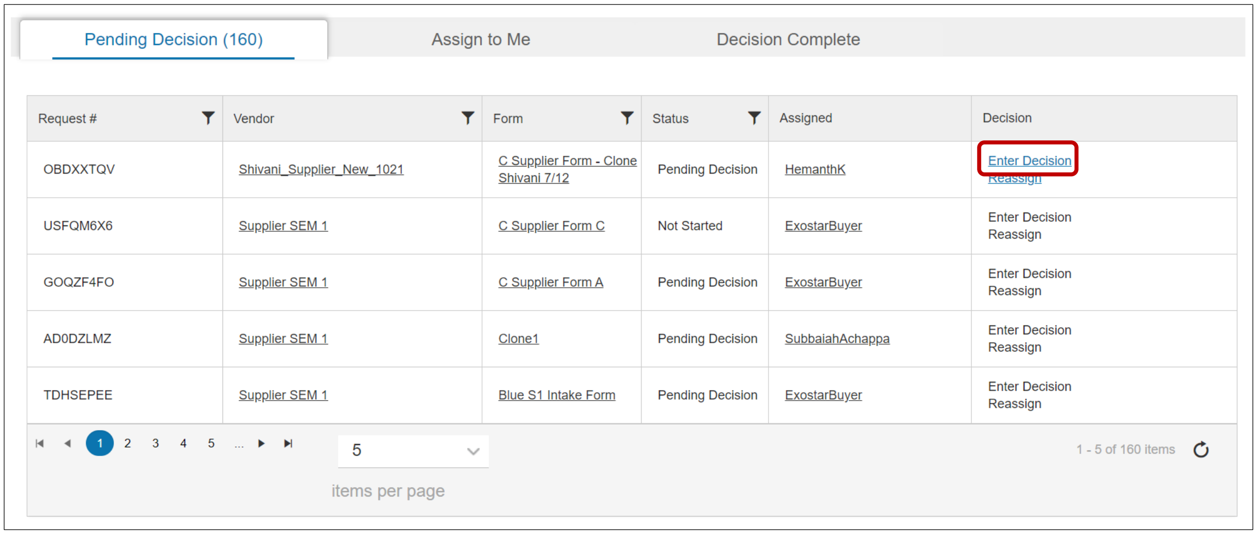


Reject Form

To reject a form:

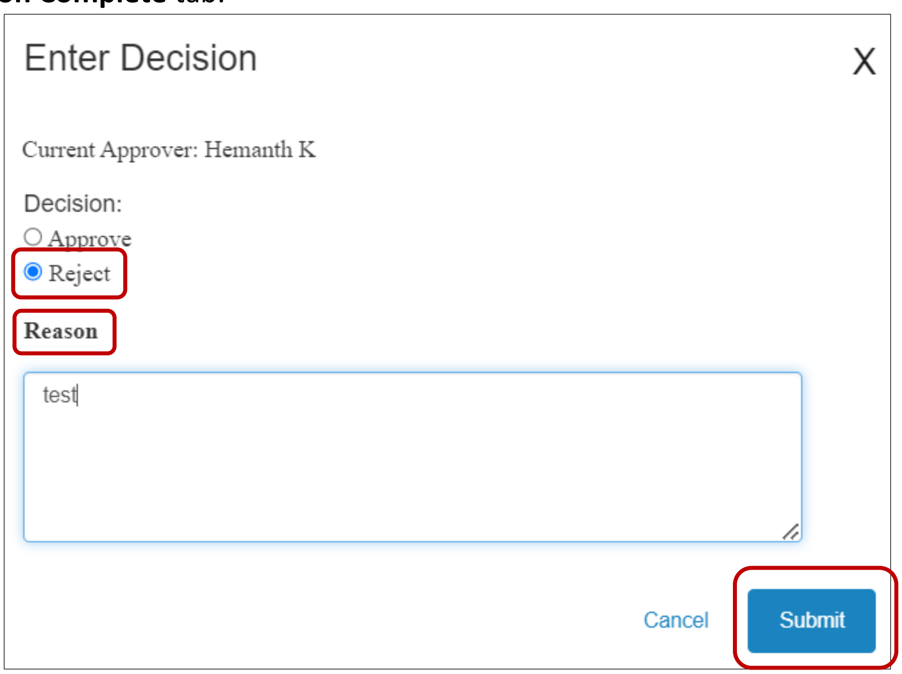
1. Select **Approval Decision** from the left-hand menu.
2. Locate the desired form. Click the **Enter Decision** link.

NOTE: If **Approval Decision** has been assigned to you, the form displays in both the **Pending Decision** tab and the **Assign to Me** tab.



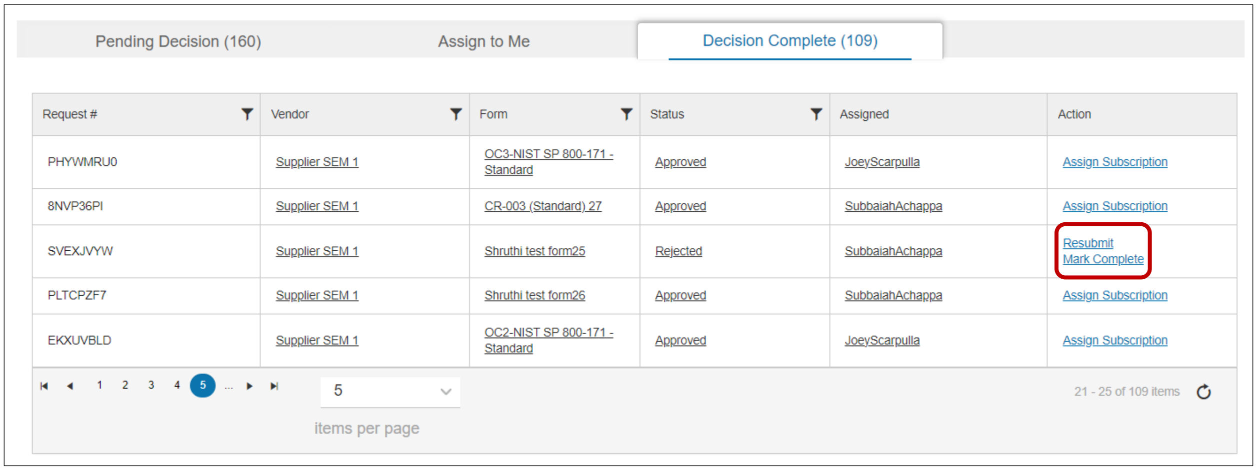
NOTE: You can select the **Reassign** link to reassign the Approval Decision.

3. Select the **Reject** radio button. Enter **Reject Reason**. Click **Submit** to send the form to the **Decision Complete** tab.



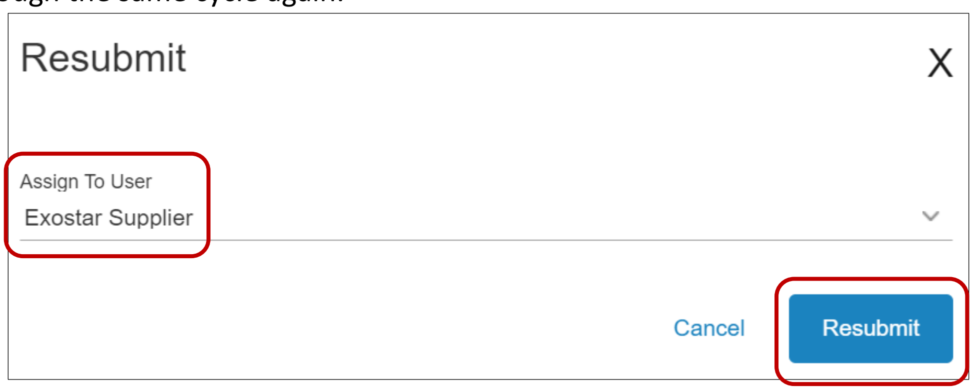
4. Navigate to the **Decision Complete** tab and locate the form. Click the **Resubmit** link.

NOTE: If no further action is needed, click **Mark Complete**.



5. Assign the desired user from the drop-down menu. Click **Resubmit** to send the form back to the Supplier for updates.

NOTE: Selecting **Resubmit** will move the form back to the Supplier's **Pending Forms** tab and it will go through the same cycle again.



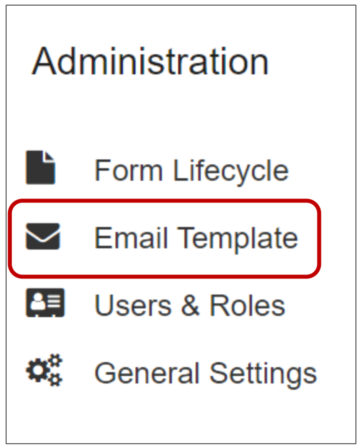
Manage System Emails

Functional Administrators and Technical Administrators can manage emails sent from OBM system, by updating and modifying content at any time. Every email sent from OBM has a template, and those templates are targeted for role-specific audiences (Buyer Admin, Supplier Admin, Buyer User).

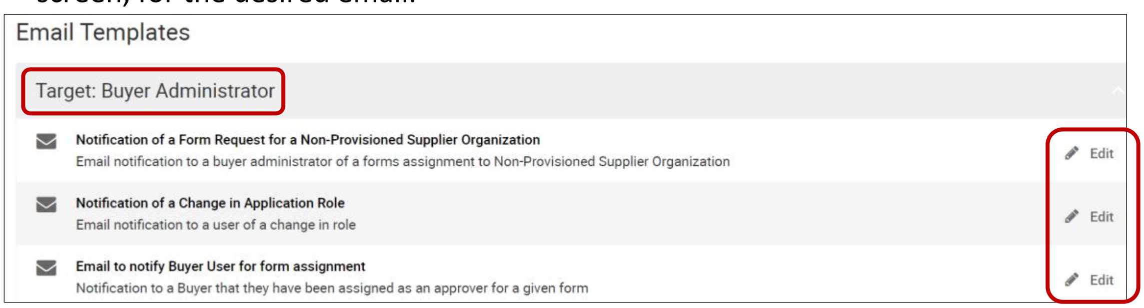
Upon initial display of the **Email Template** page, all the current email's recipient information (To, CC, Subject Line, and Email Body Text) displays as default content. Administrators can edit this information as needed. All variables/fields in the email body (i.e. the values/parameters that can change per the email's context) are shown within brackets such as "[Variable Name]".

To modify email templates:

1. From the left-hand navigation on the Dashboard, click **Email Template** under the **Administration** section.

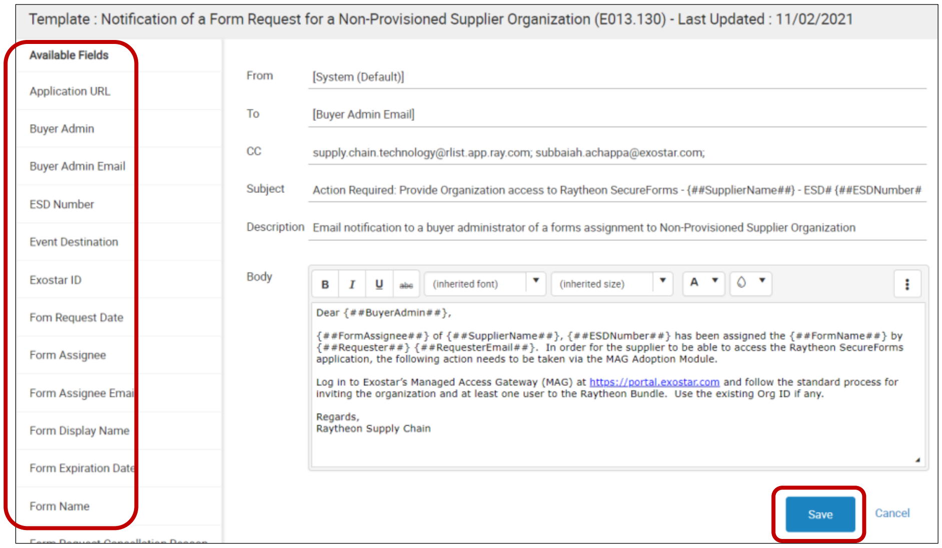


2. Navigate to the desired **Target** section. Click the **Edit** icon, located on the right side of the screen, for the desired email.



NOTE: The top portion of the template displays **Email Template Name**, **Current Version Number**, and **Last Updated Date**.

3. Drag and drop desired fields from the options provided along the left side of the screen, into the body of the HTML editor. Click **Save** to complete the update.



NOTE: Every time an Administrator edits and saves an email template, the template is incremented to the next version.

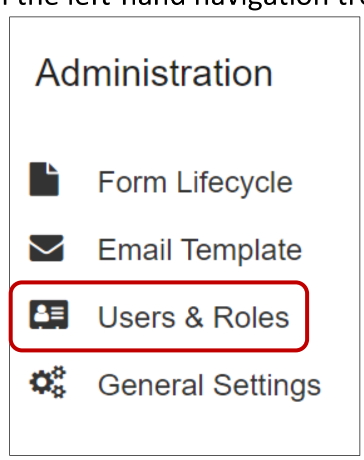
User Management

Administrators can manage all users in OBM. This role can modify roles of any users, across all organization records in OBM, along with the ability to deactivate accounts. Functional Administrators can also set role definitions.

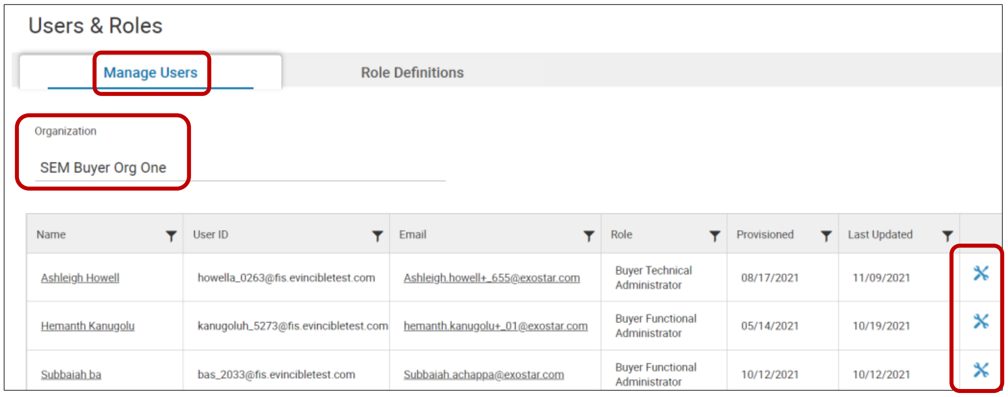
Modify User Role and Status

To modify a user's record:

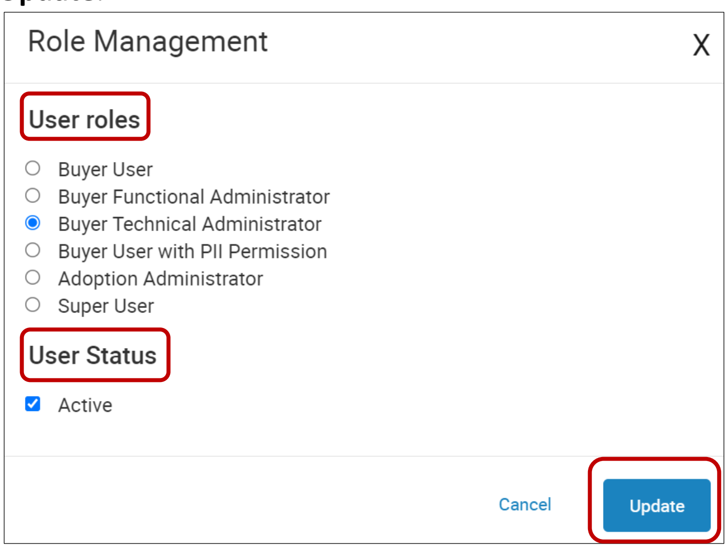
1. Select **Users & Roles** from the left-hand navigation tree, under **Administration**.



2. The system defaults to the **Manage Users** tab. To search for an organization, enter the **Organization Name** in the text box. All users for that organization display in list view. Click the tool icon next to the desired user.



3. The **Role Management** pop-up displays. From this screen, update the user's roles or status. Click **Update**.



NOTE: If a user is deactivated in OBM, they are not deactivated in MAG. To remove a user from MAG, contact the organization's MAG Organization or OBM Application Administrator. If users are no longer with the company, their accounts should be removed from MAG, which removes them from OBM.

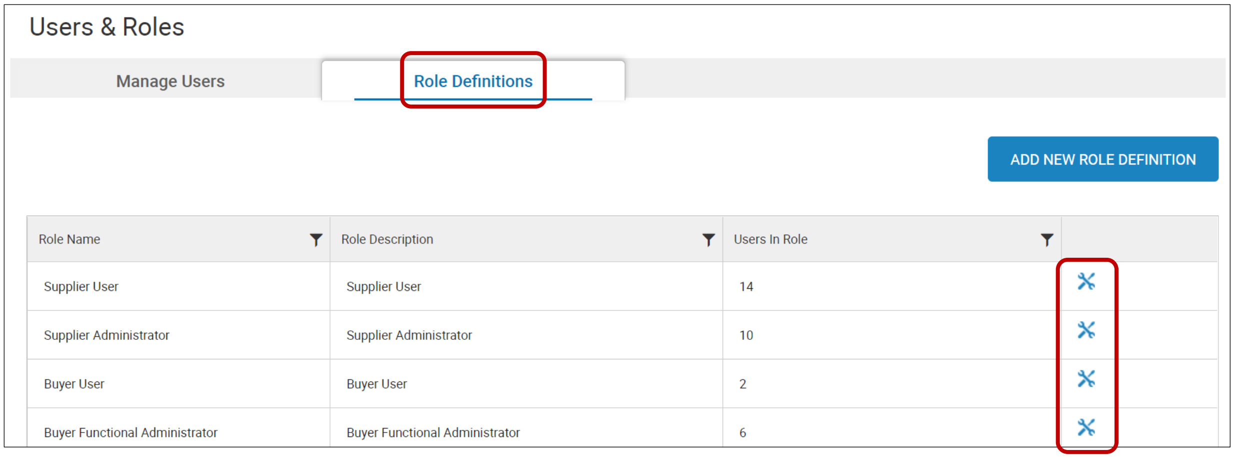
Set Role Definitions

Functional Administrators and Technical Administrators can modify existing role definitions, as well as create new role definitions. This essentially allows the administrator to modify role permissions.

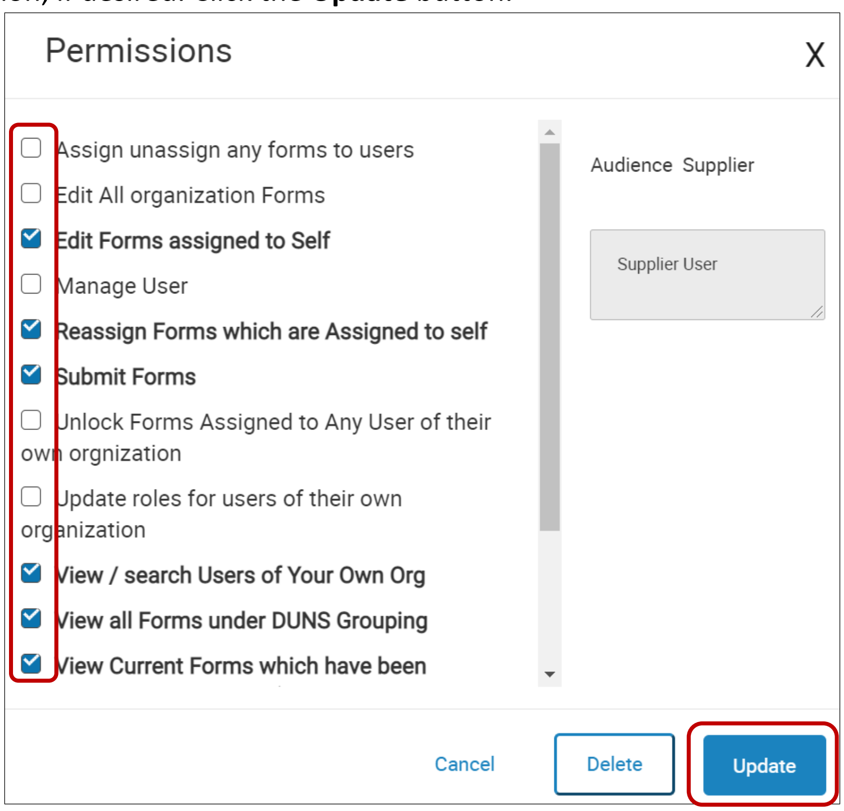
Modify Existing Role Definitions

To modify existing role definitions:

1. Select **Users and Roles** from the left-hand navigation menu.
2. Navigate to the **Role Definitions** tab. Select the tool icon next to the desired role.



3. Select or deselect **Permissions** as desired. Edit the **Audience** to change the role description, if desired. Click the **Update** button.

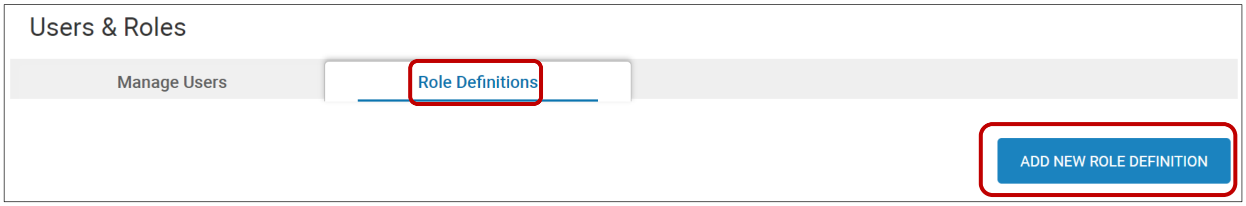


NOTE: If you wish to delete the role, simply navigate to the **Permissions** prompt, and select the **Delete** button.

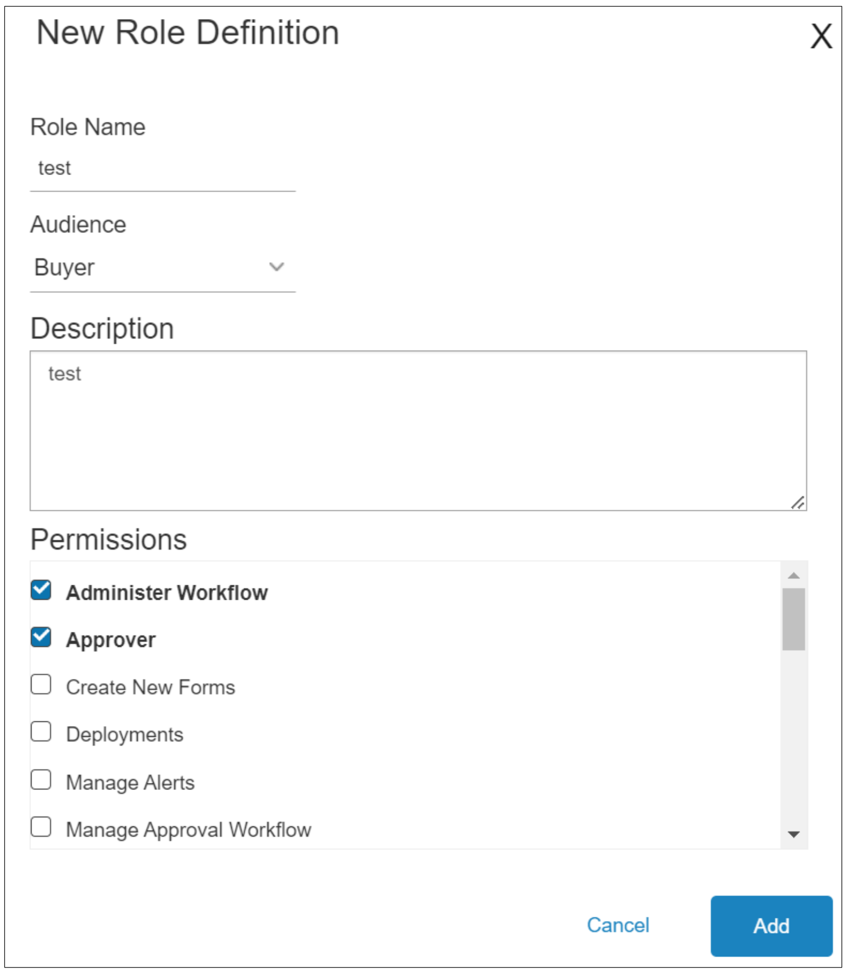
Create New Role Definitions

To create a new role definition:

1. Select **Users and Roles** from the left-hand navigation menu.
2. Navigate to the **Role Definitions** tab. Select **the ADD NEW ROLE DEFINITION** button.

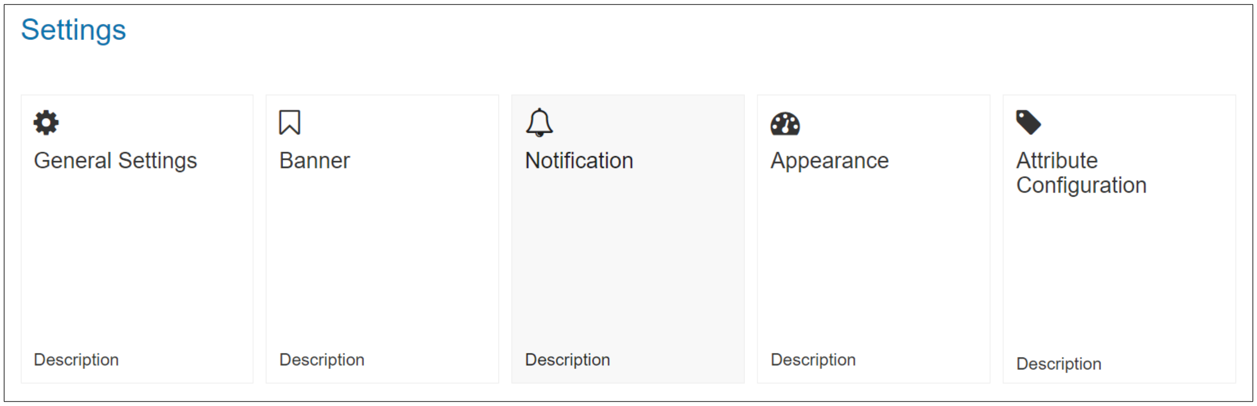


3. Complete the **Role Name** field. Select from the **Audience** drop-down. Provide a **Description** and select **Permissions**. Click **Add**.



General Settings

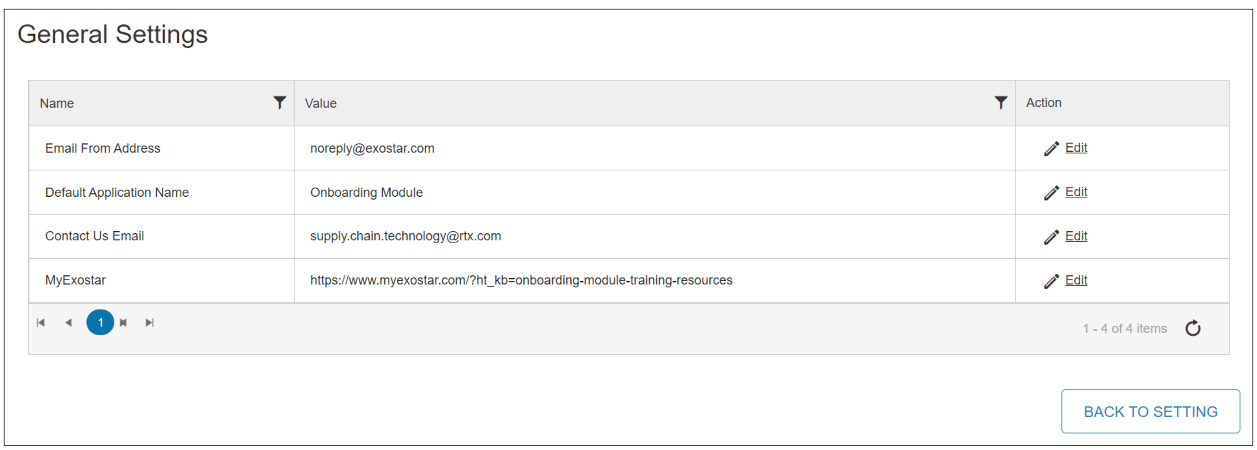
General Settings is available from the left-hand menu and displays the following options:



General Settings

The General Settings selection provides the following editable features as well as their current values:

- **Email From Address**: This selection allows you to update the Email From Address.
- **Default Application Name**: This selection allows you to update the application name that displays in the top header.
- **Contact Us Email**: This selection allows you to update the Contact Us email address that displays in the top header.
- **MyExostar**: This selection allows you to update the myExostar link that displays in the top header.

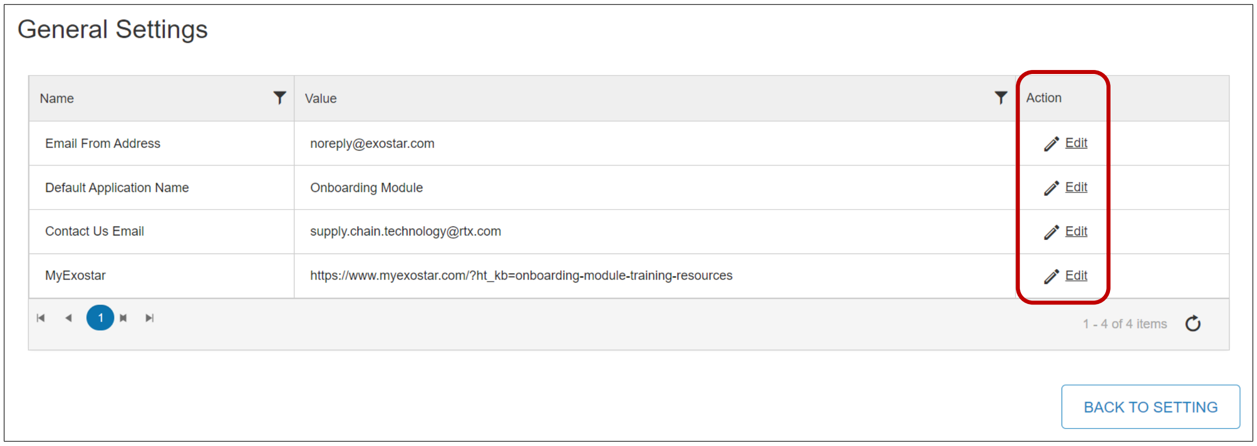


General Settings

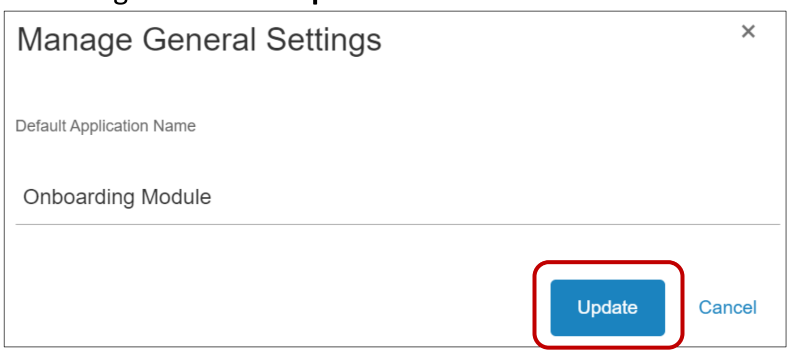
Name	Value	Action
Email From Address	noreply@exostar.com	Edit
Default Application Name	Onboarding Module	Edit
Contact Us Email	supply.chain.technology@rtx.com	Edit
MyExostar	https://www.myexostar.com/?ht_kb=onboarding-module-training-resources	Edit

To edit any of the options:

1. Select the **Edit** icon in the **Action** column.



2. Make desired changes. Click the **Update** button.



Banner

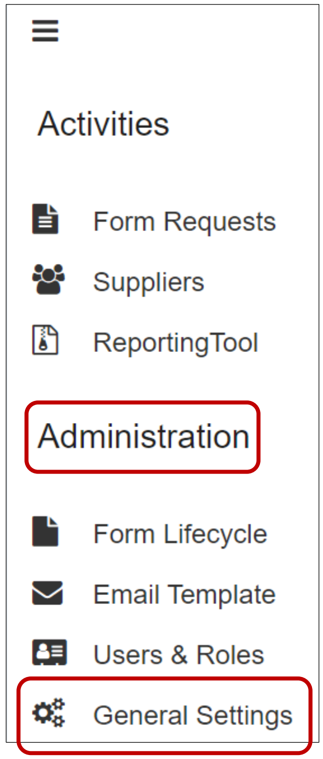
Depending on system permissions, Administrators can modify banner messages. There are two types of banners:

- **Site**: Displays announcements on the Supplier View.
- **Report**: Displays announcements in reporting.

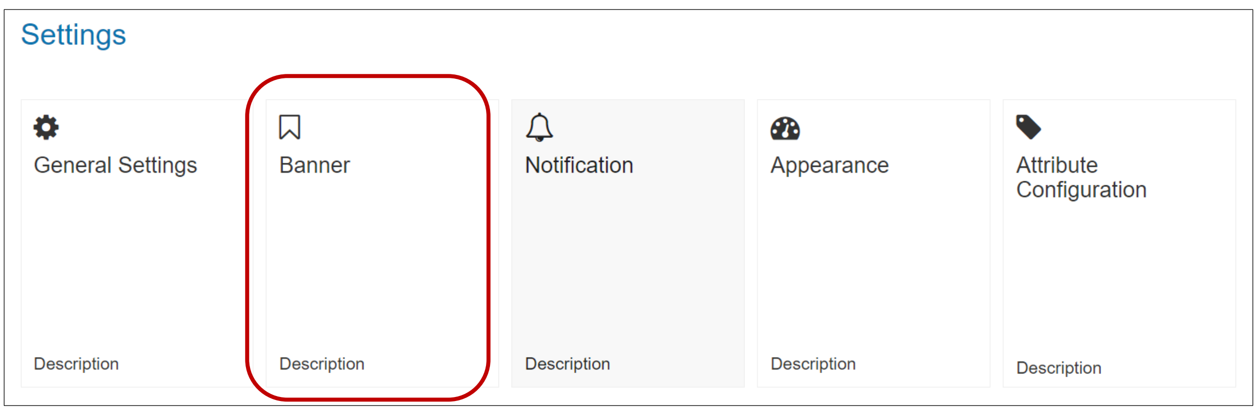
Modify Existing Banner

To modify existing banner messages:

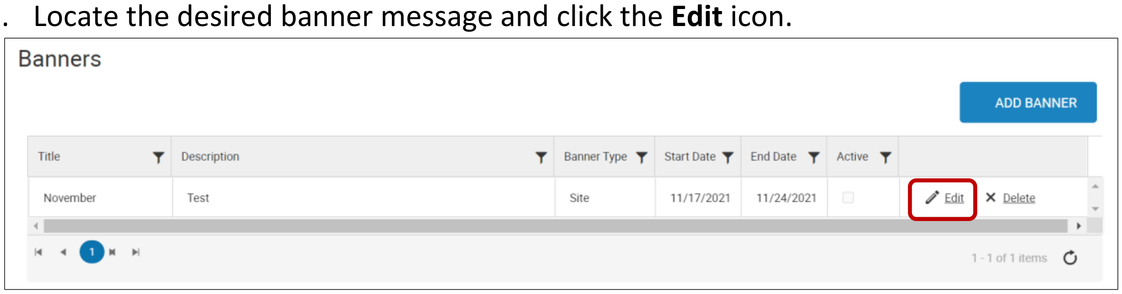
1. From the left-hand navigation, select the **General Settings** option under **Administration**.



2. Select **Banner**.

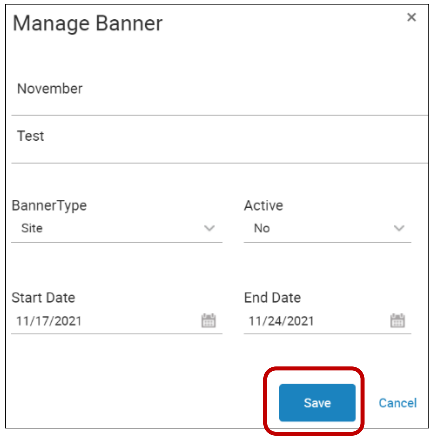


3. Locate the desired banner message and click the **Edit** icon.



NOTE: Select the **Delete** option to remove the banner completely.

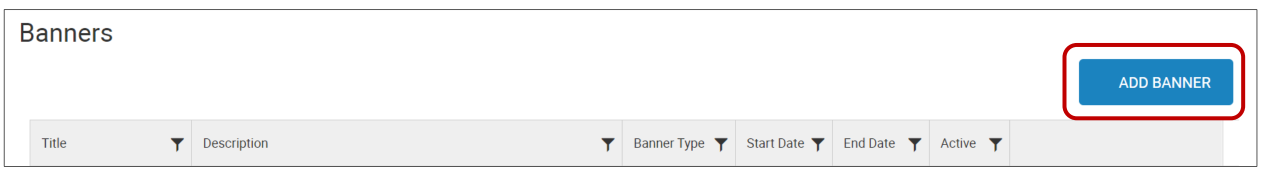
4. Make all desired changes. Click **Save**.



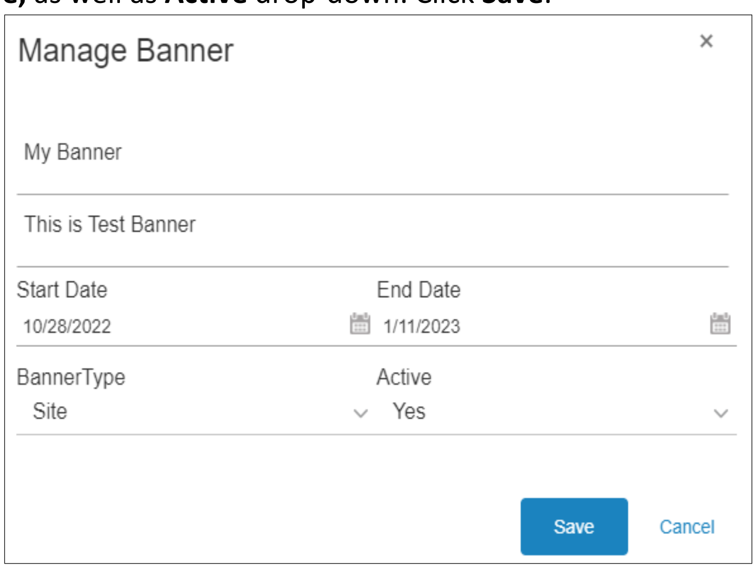
Add New Banner

To create a new banner message:

1. From the left-hand navigation, select the **Banner** option under **Administration**. Click the **Add Banner** button.



2. The **Manage Banner** screen displays. Add the **Title**, **Description**, **Start Date** and **End Date, Banner Type,** as well as **Active** drop-down. Click **Save**.

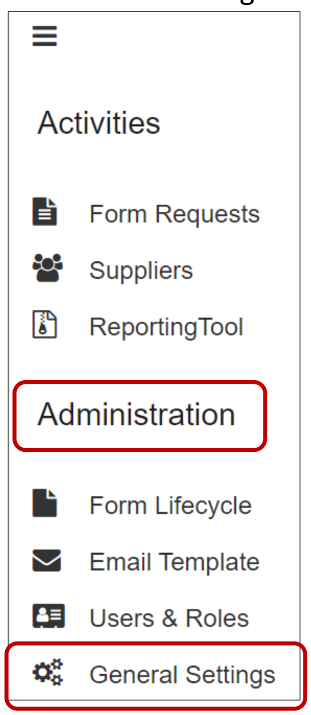


Notification

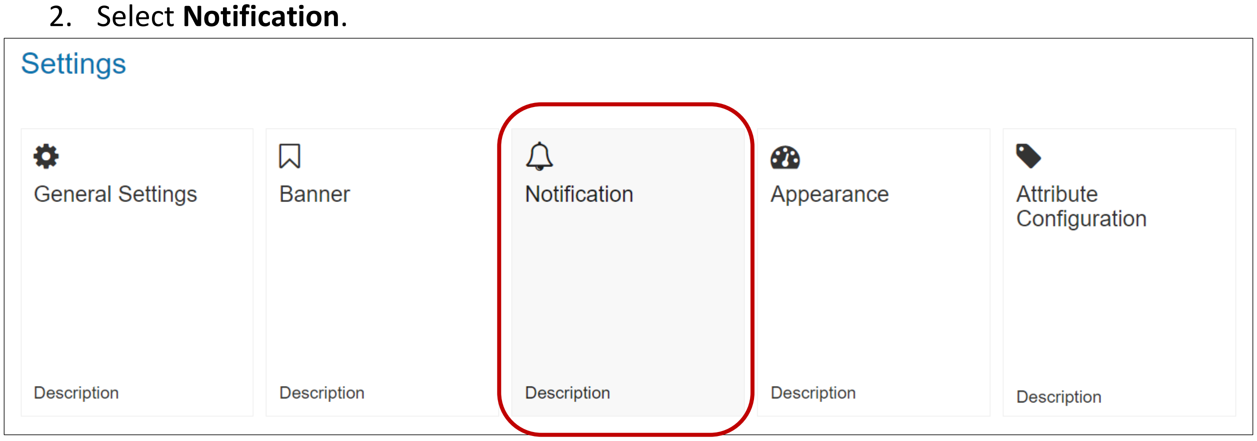
The Notifications section of the application is available from the **General Settings** page via the left-hand navigation menu. This allows you to set interval types, values, and reminder counts on some events. Notifications are used to send out email reminders, using a selected email templates (created in notifications) on specific configured internals on a given event

To navigate to and manage notifications:

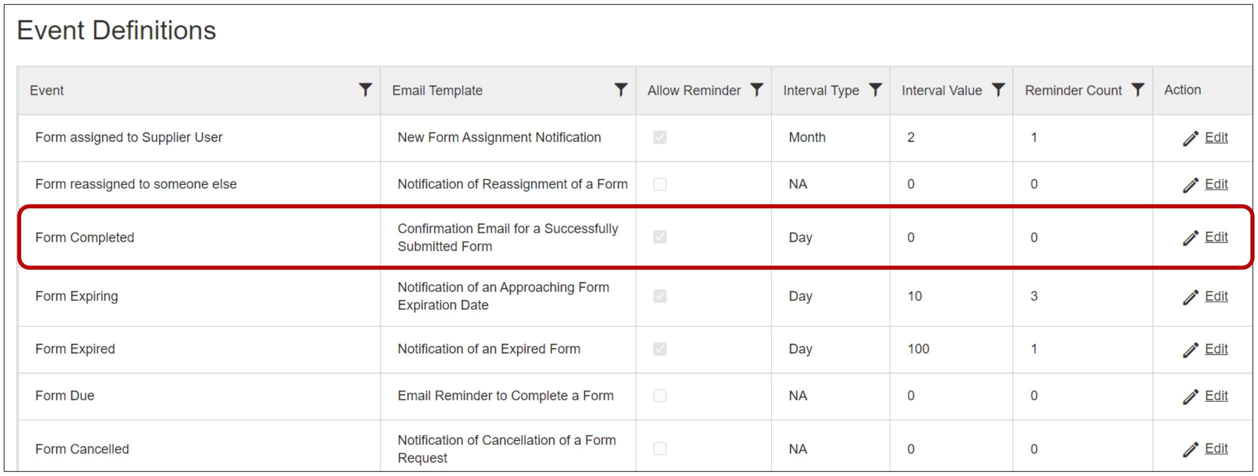
1. Select **General Settings** from the left-hand navigation menu.



2. Select **Notification**.



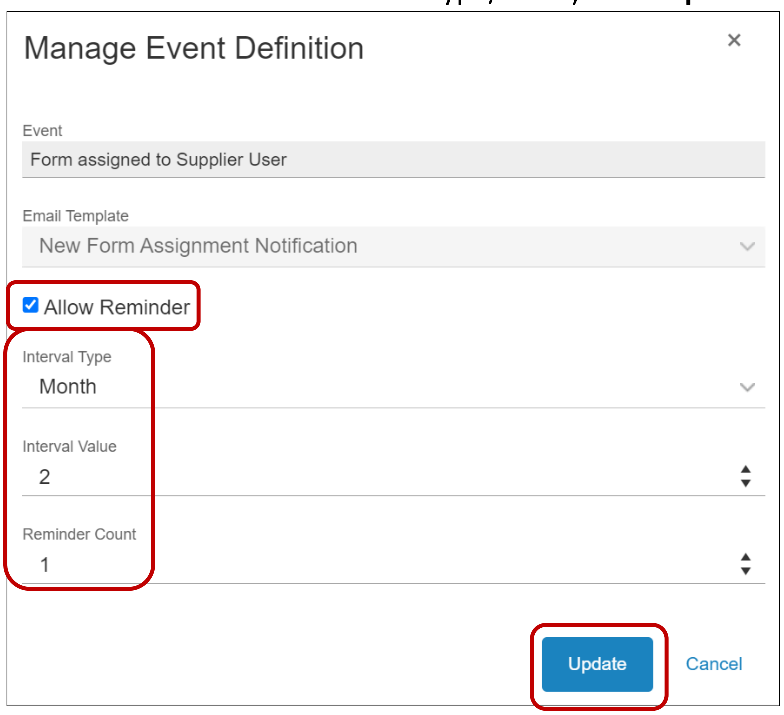
3. Click **Edit** for the desired **Event**.



Event Definitions

Event	Email Template	Allow Reminder	Interval Type	Interval Value	Reminder Count	Action
Form assigned to Supplier User	New Form Assignment Notification		Month	2	1	Edit
Form reassigned to someone else	Notification of Reassignment of a Form		NA	0	0	Edit
Form Completed	Confirmation Email for a Successfully Submitted Form		Day	0	0	Edit
Form Expiring	Notification of an Approaching Form Expiration Date		Day	10	3	Edit
Form Expired	Notification of an Expired Form		Day	100	1	Edit
Form Due	Email Reminder to Complete a Form		NA	0	0	Edit
Form Cancelled	Notification of Cancellation of a Form Request		NA	0	0	Edit

4. Deselect or select the **Allow Reminder** checkbox.
5. Select **Day**, **Week**, or **Month** from the **Interval Type** drop-down menu.
6. Select the **Interval Value** (day, week, month) and **Reminder Count** (total number of reminder emails sent out based on interval type/value). Click **Update**.



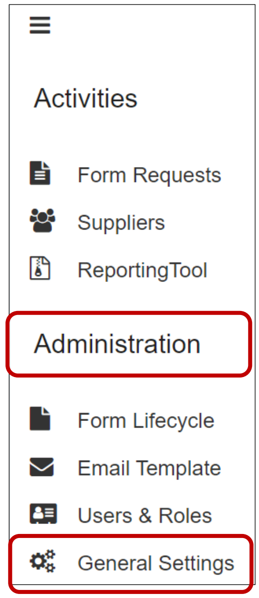
Appearance

The Appearance section is available from the General Settings page and allows end users to upload logo images, as well as customize links available from the dashboard.

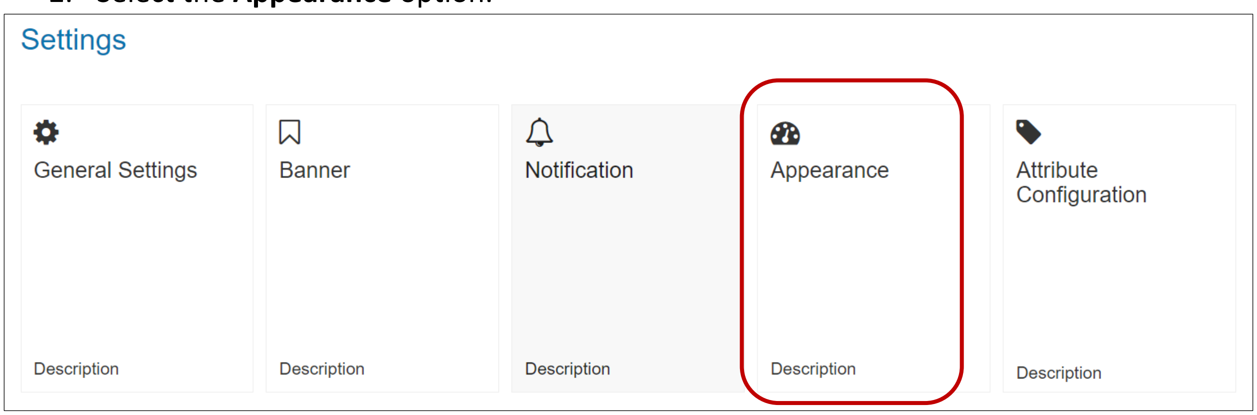
Upload Logo

To upload a logo image:

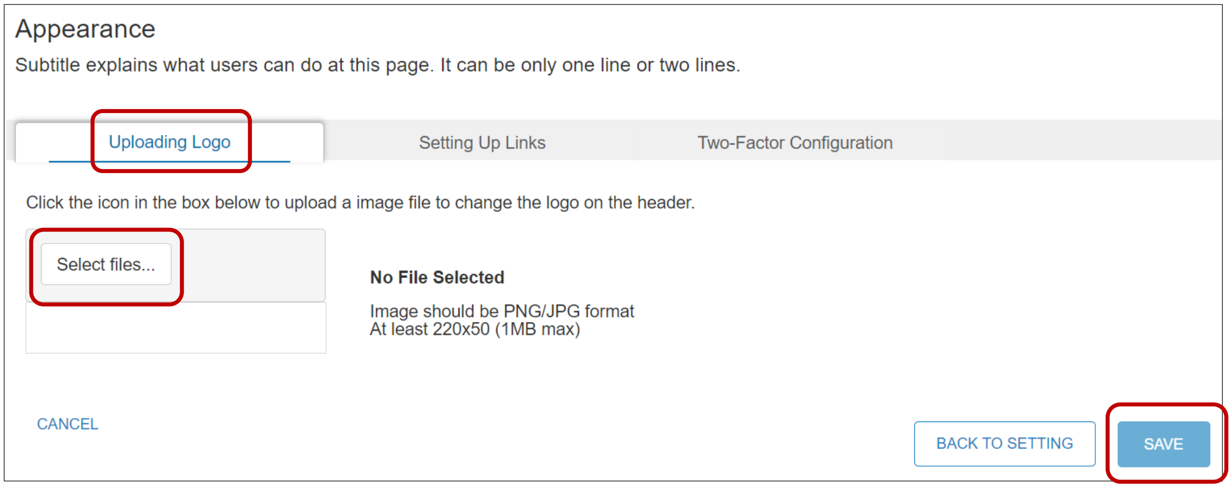
1. Select **General Settings** from the left-hand navigation.



2. Select the **Appearance** option.



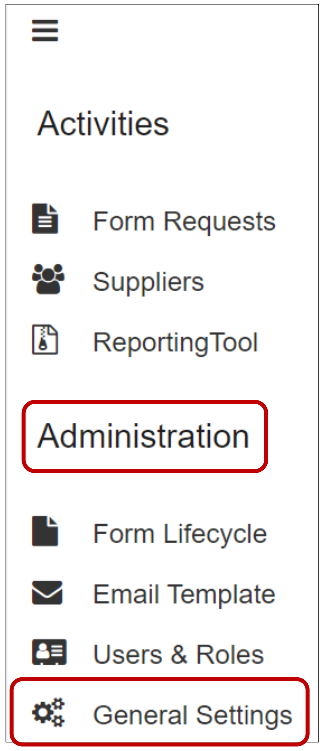
3. On the **Uploading Logo** sub-tab, click **Select files…**and choose the desired file from your local drive. Click **Save**.



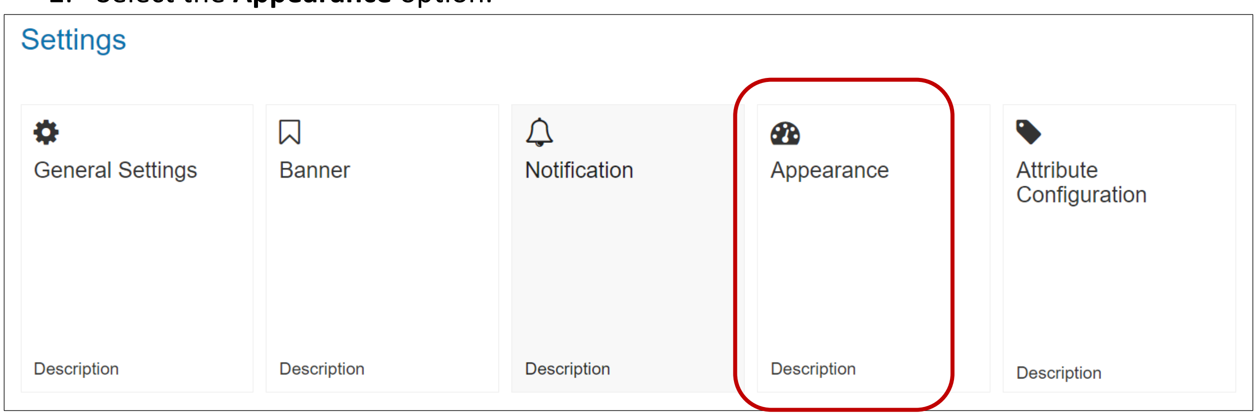
Customize Links

To customize the links displayed on the dashboard:

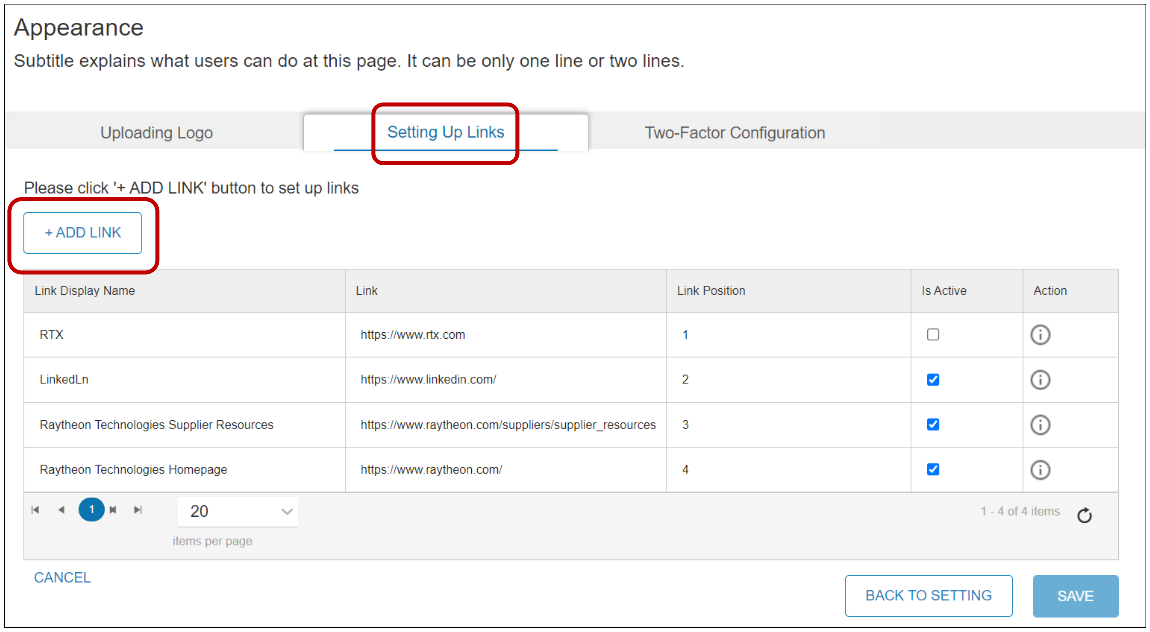
1. Select **General Settings** from the left-hand navigation.



2. Select the **Appearance** option.



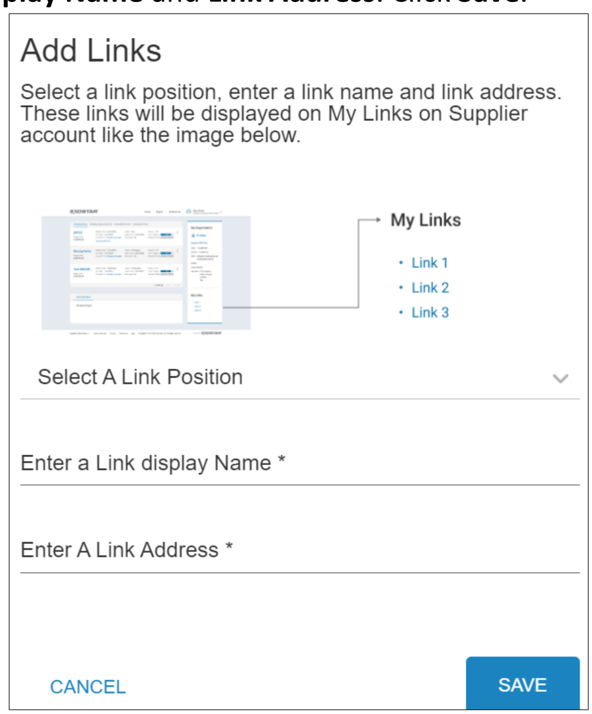
3. Open the **Setting Up Links** sub-tab. Click the **Add Link** button.



4. Choose from the **Select a Link Position** drop-down.

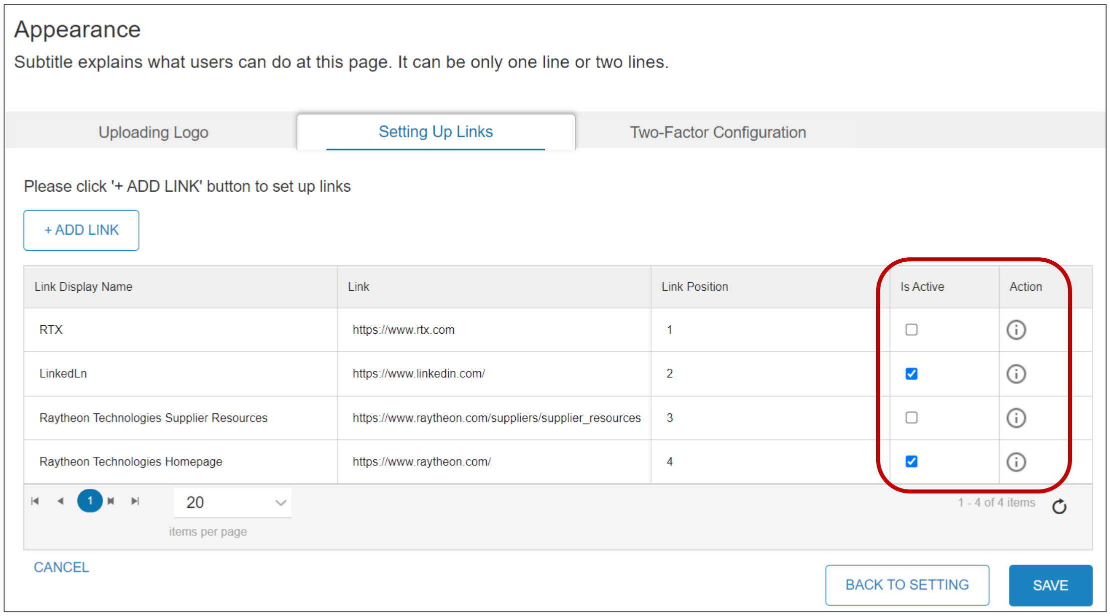
NOTE: This determines the order in which the links display.

5. Enter the **Link Display Name** and **Link Address**. Click **Save**.



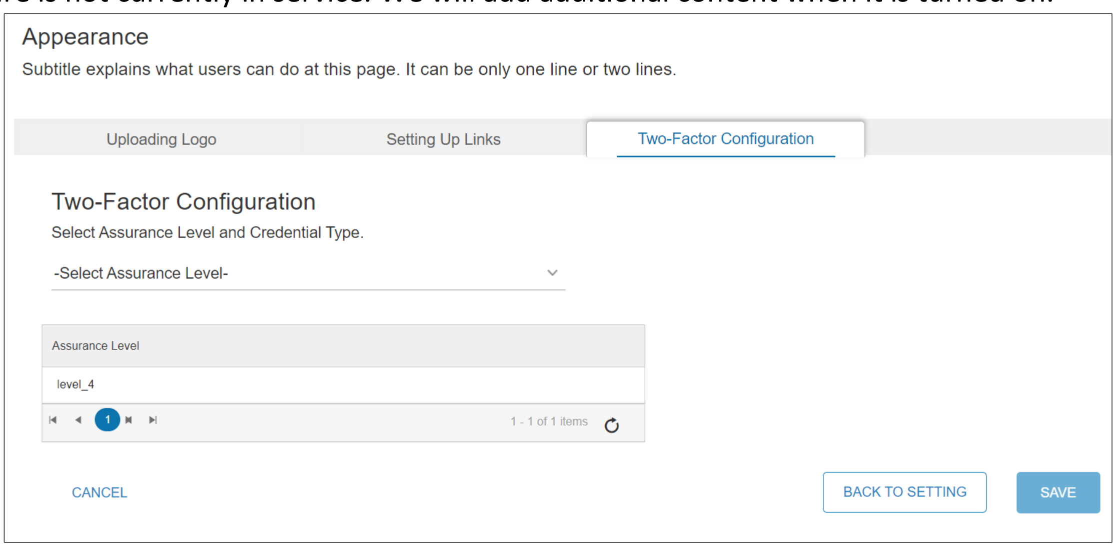
To manage existing links:

1. Locate the desired link and select or deselect the **Is Active** checkbox.
2. Select the **Action** option for the desired link to update name and address.



Two-Factor Configuration

This section allows you to configure required credentials to get into the Onboarding Module. This feature is not currently in service. We will add additional content when it is turned on.

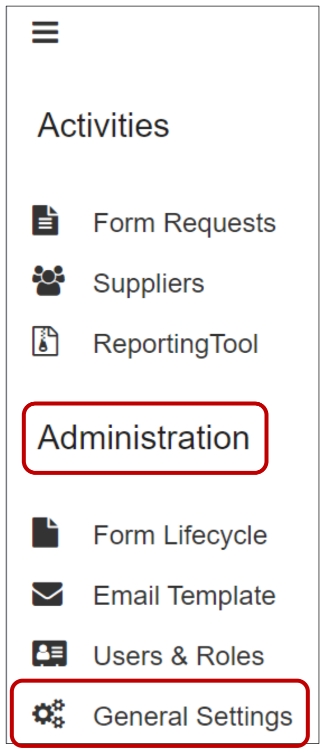


Attribute Configuration

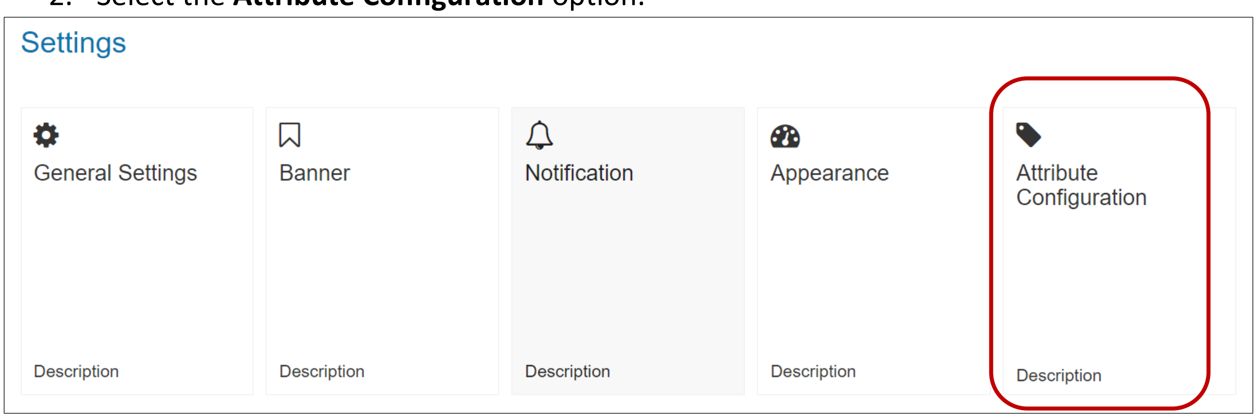
Users with permission to manage attributes can create Supplier Attributes, or groups. These Attributes can be used during the New Form Request process, when sending a single form to multiple Suppliers. If you are updating an existing Category/Attribute, you can begin this process on the Associate Attributes tab.

To create an Attribute Configuration:

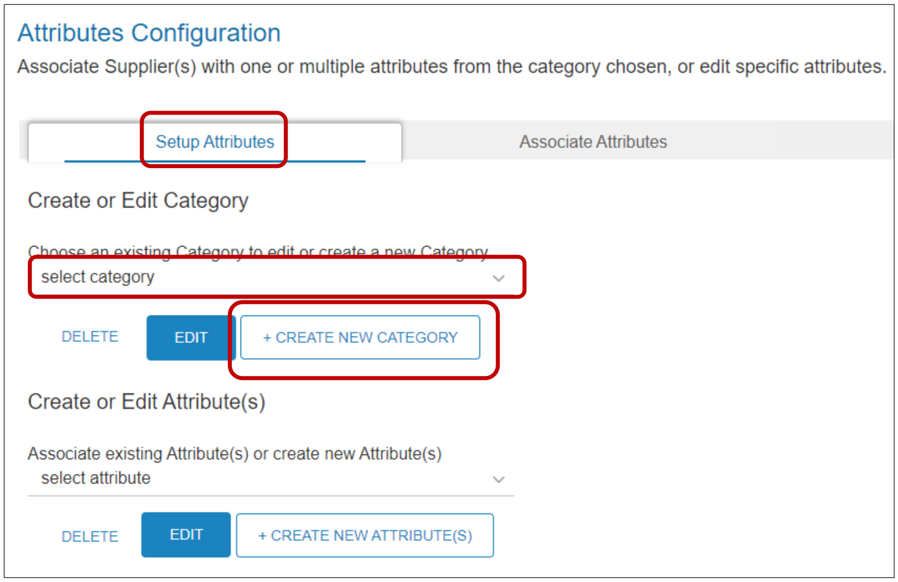
1. Select **General Settings** from the left-hand navigation.



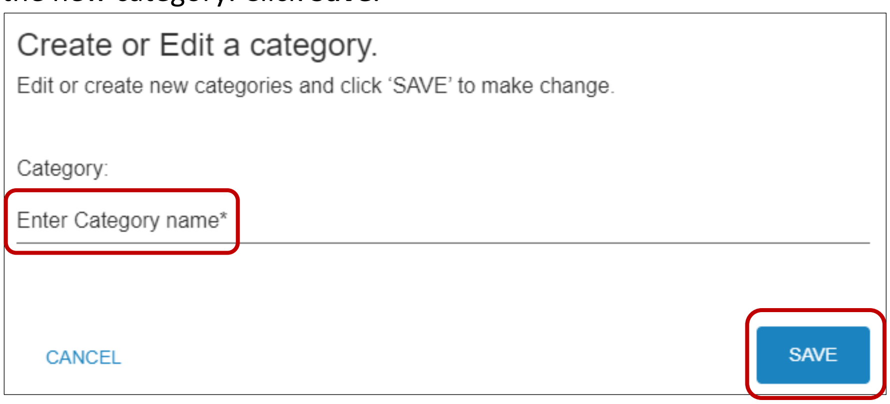
2. Select the **Attribute Configuration** option.



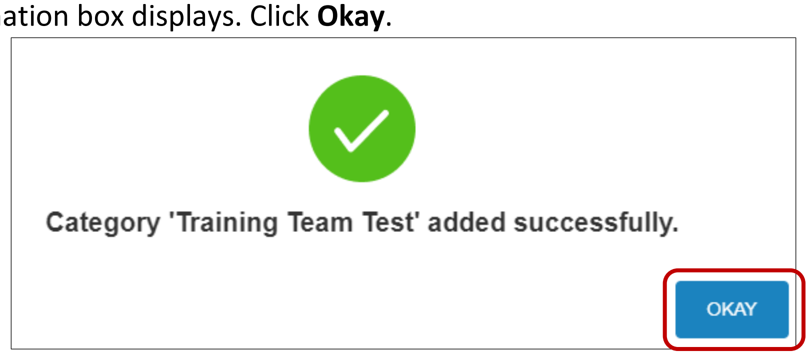
3. On the **Setup Attributes** tab, select an existing category to edit or delete, or select the **+CREATE NEW CATEGORY** button.



4. Name the new category. Click **Save**.

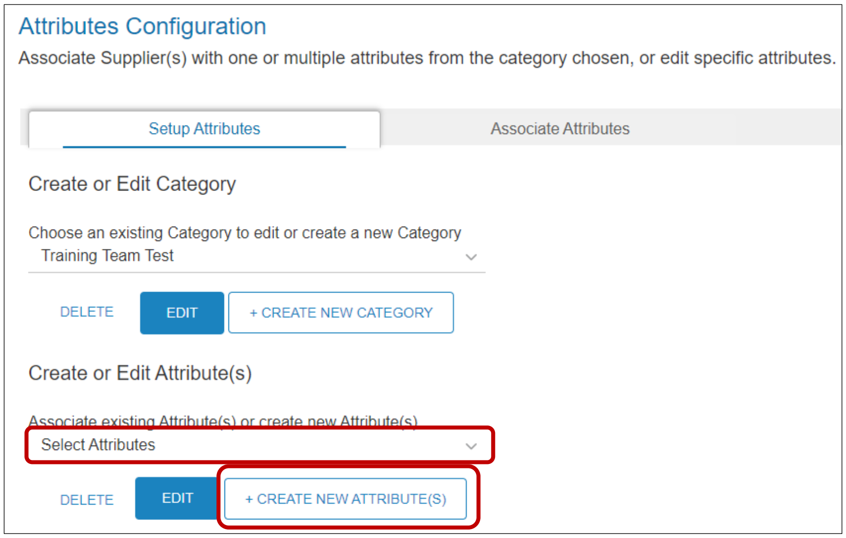


5. A confirmation box displays. Click **Okay**.

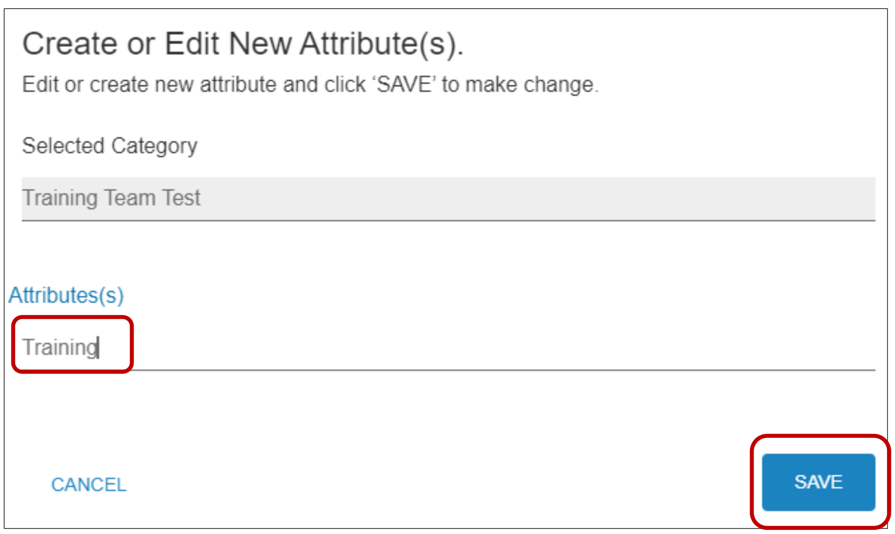


6. Select an existing attribute to edit or delete or select the **+CREATE NEW ATTRIBUTE(S)** button.

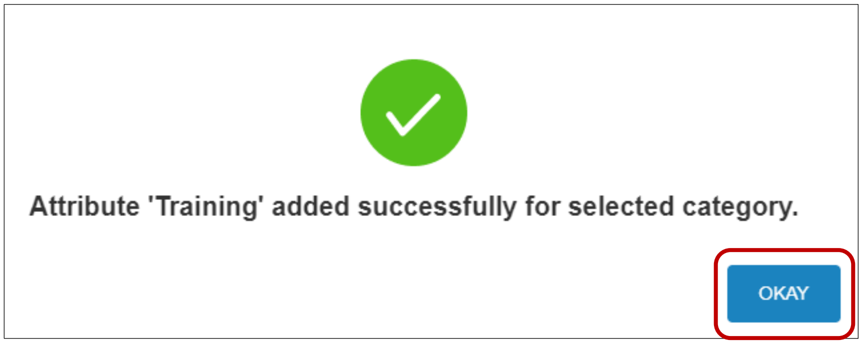
NOTE: You cannot select an existing Attribute or create a new one if a Category is not selected.



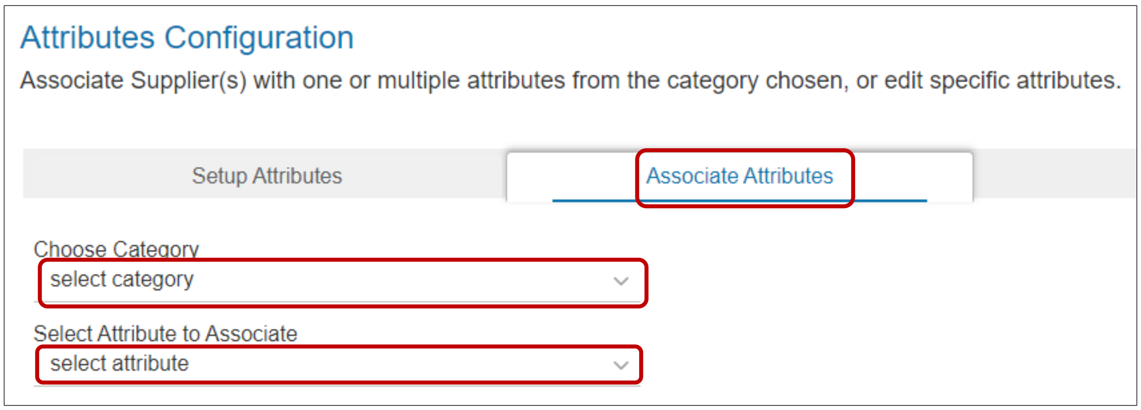
7. Name the new **Attribute**. Click **Save**.



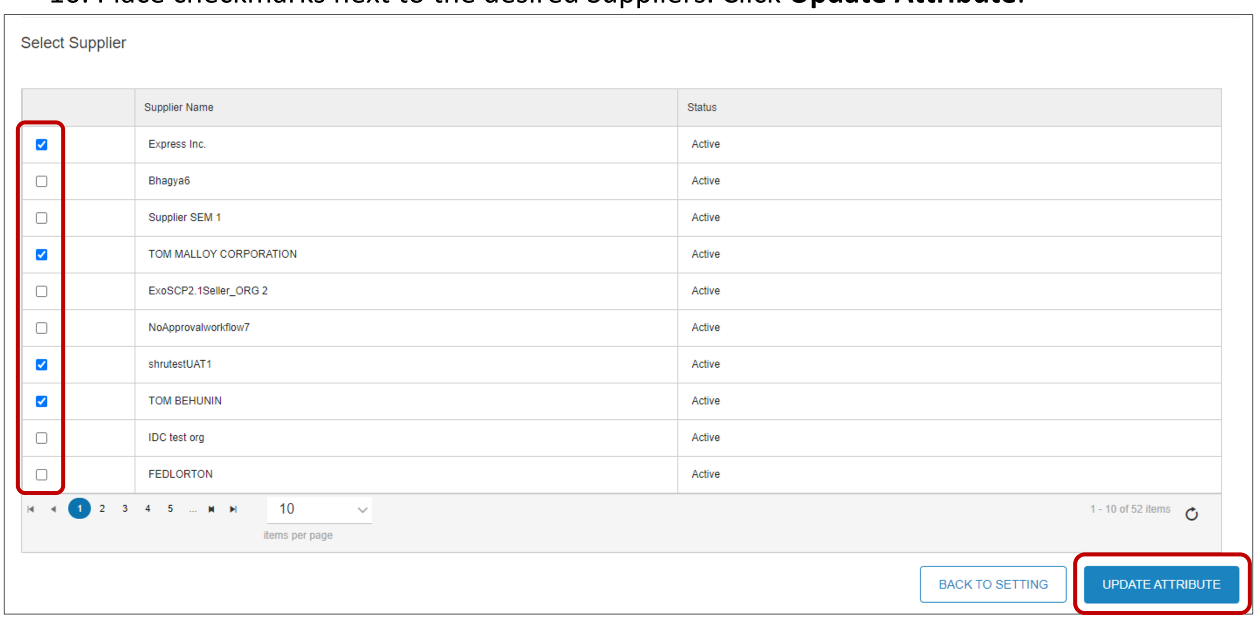
8. On the confirmation screen, click **Okay**.



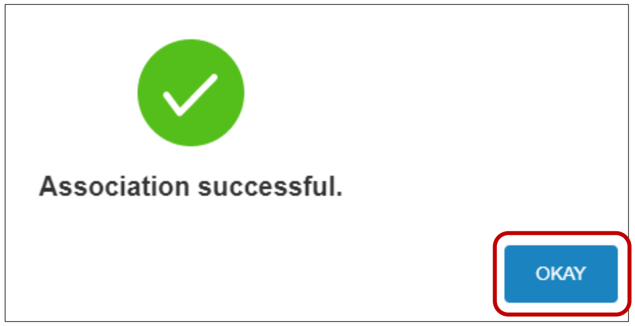
9. To add Suppliers to the Attribute, navigate to the **Associate Attributes** tab. Select the **Category**. Select the **Attribute**.



10. Place checkmarks next to the desired Suppliers. Click **Update Attribute**.



11. Click **Okay** in the confirmation box.



SUPPLIERS

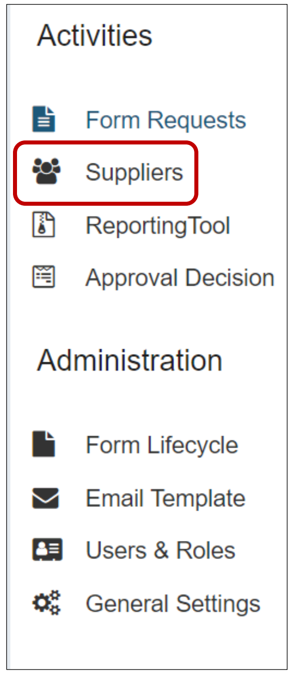
The Suppliers section of OBM allows you to search for existing suppliers in MAG, as well as add new suppliers. Only existing MAG Suppliers, who are not provisioned to OBM, can be invited.

IMPORTANT! To invite a Supplier to access OBM, a Buyer must have the Adoption Administrator role for the OBM application in MAG. Exostar must add this role to your user account. Please contact Exostar Customer Support to inquire about getting the Adoption Administrator role. Please see the Adoption Module Invitation section below for more information.

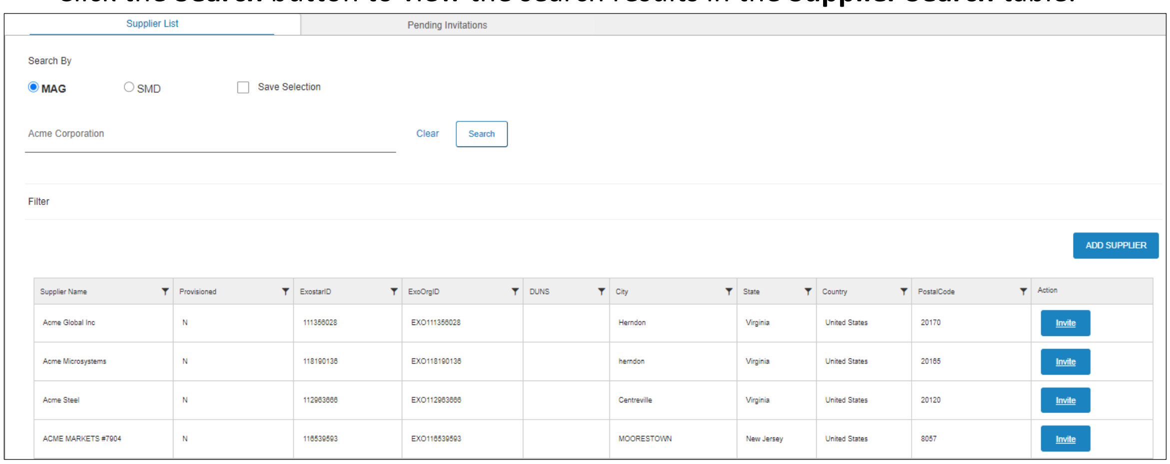
Supplier Search

Buyer users can search Exostar's MAG and SMD database for suppliers. To complete a search:

1. Select **Suppliers** from the left-hand navigation menu.



2. On the **Supplier List** tab, enter the name of a supplier in the **Enter Organization** text area. Click the **Search** button to view the search results in the **Supplier Search** table.

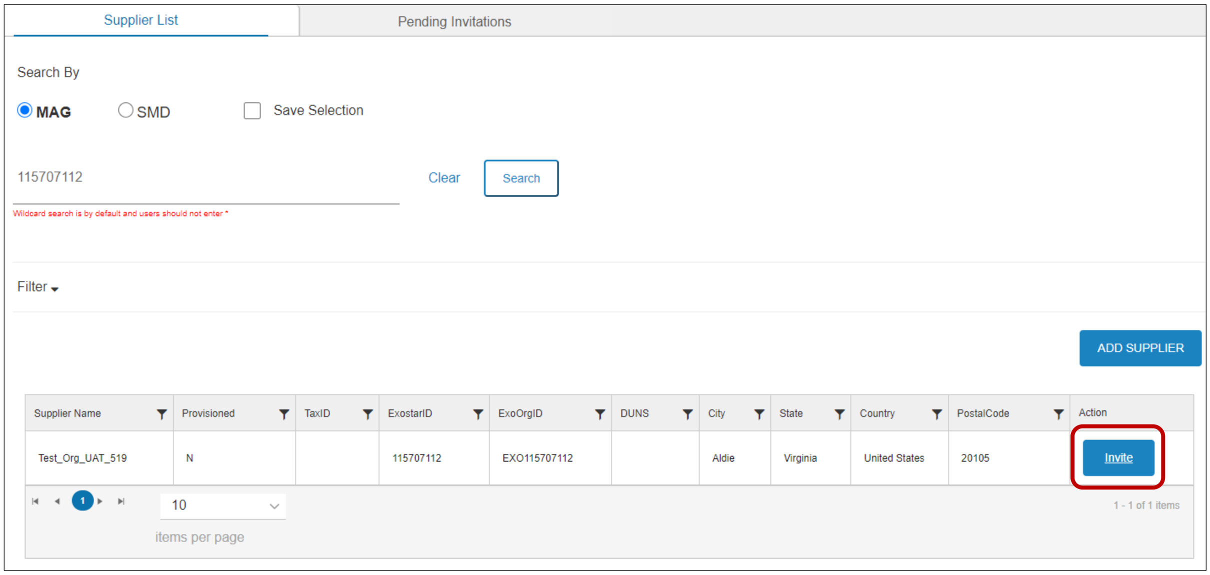


Invite

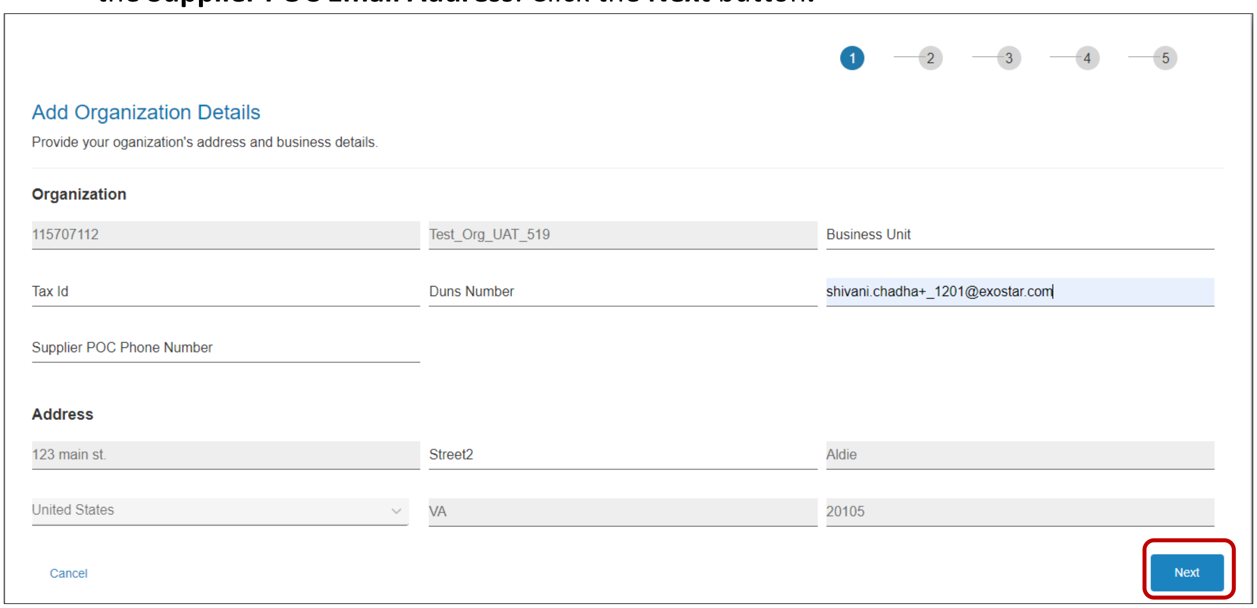
From the Supplier Search page, buyer organizations can invite existing MAG suppliers to the Onboarding Module. To invite existing MAG suppliers:

1. From the search results in the **Supplier Search** table, click the **Invite** button next to a non-provisioned supplier, where the **Provisioned** flag is **N**.

NOTE: If the Supplier is already provisioned to OBM, and the **Provisioned** flag is **Y**, the **Invite** button will be displayed in white instead of blue. You must use the MAG Adoption Module for such an invitation. Also, invited suppliers have a clickable name to view their details. Please see the Adoption Module Invitation section below for more information.

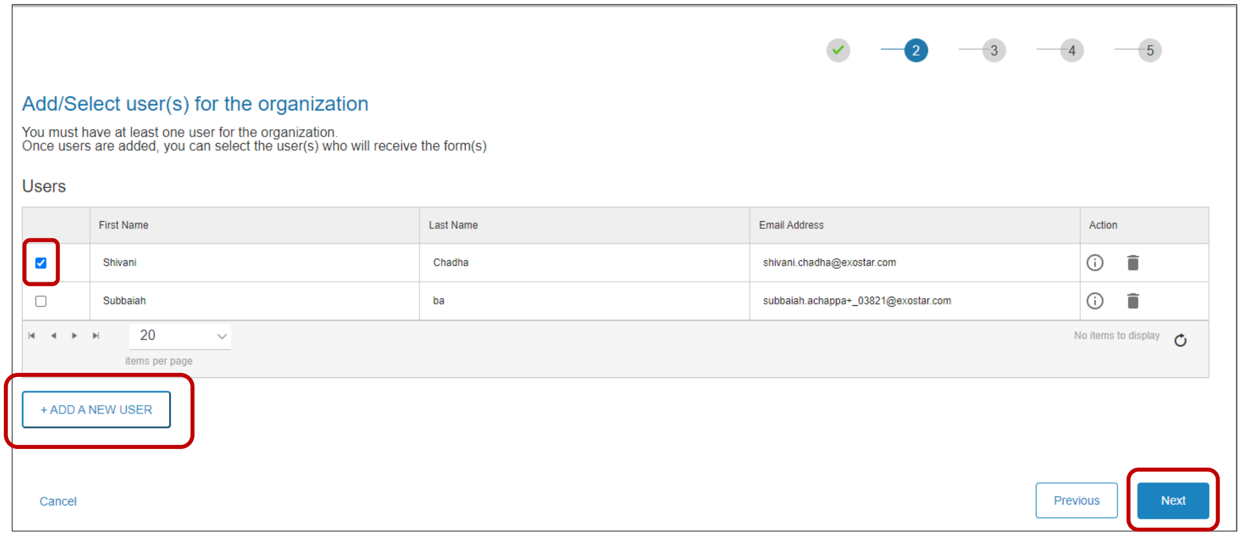


2. Review the supplier organization information on the **Organizational Details** screen. Input the **Supplier POC Email Address**. Click the **Next** button**.**

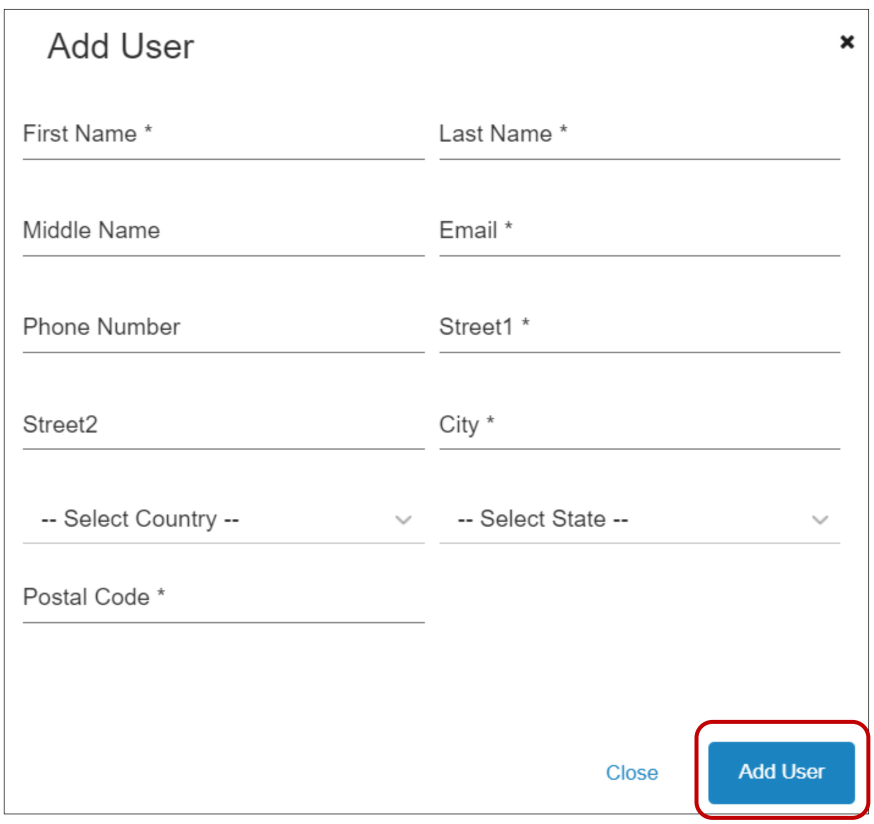


3. On the **User Details** screen, check the existing user you want to invite, and you can also add a new user by clicking the **Add New User** button. Click **Next**.

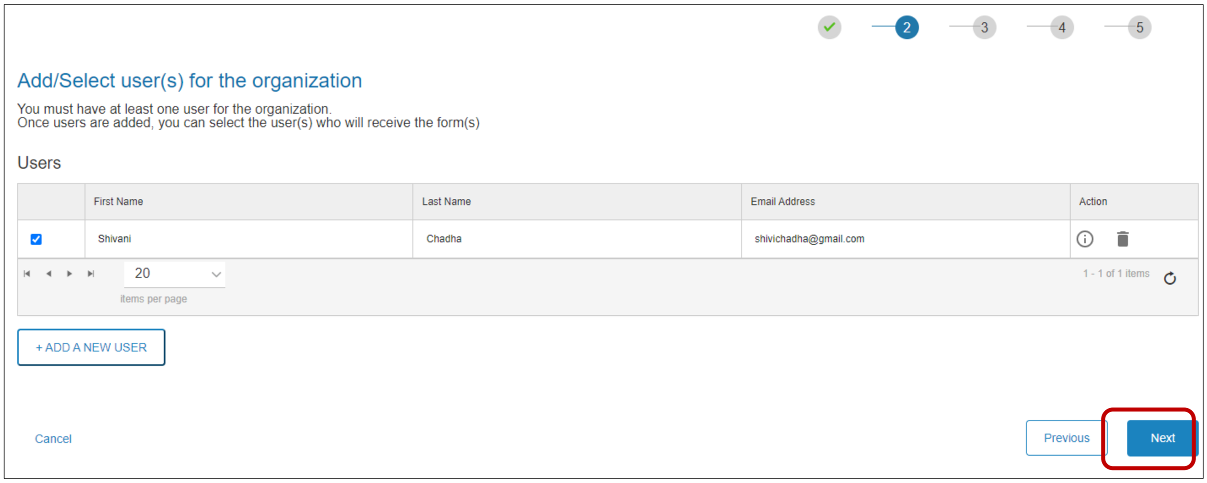
NOTE: You cannot invite a user to a shell organization in MAG, which means there should be at least one user displayed on the **User Details** page.



4. If a new user is also invited, add information about the user in the **Add New User** prompt. Click the **Add User** button.

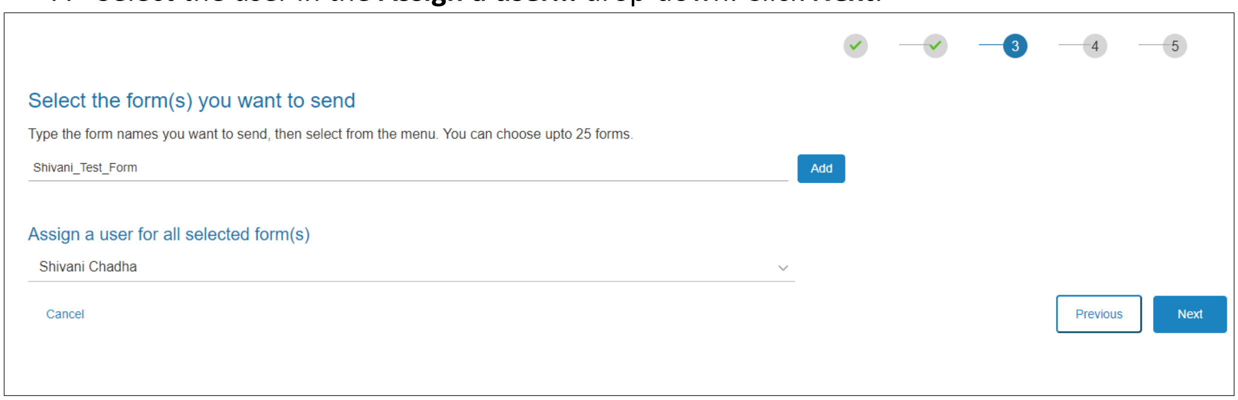


5. Once all users have been added, place checkmarks next to the users you want to invite. Click **Next**.

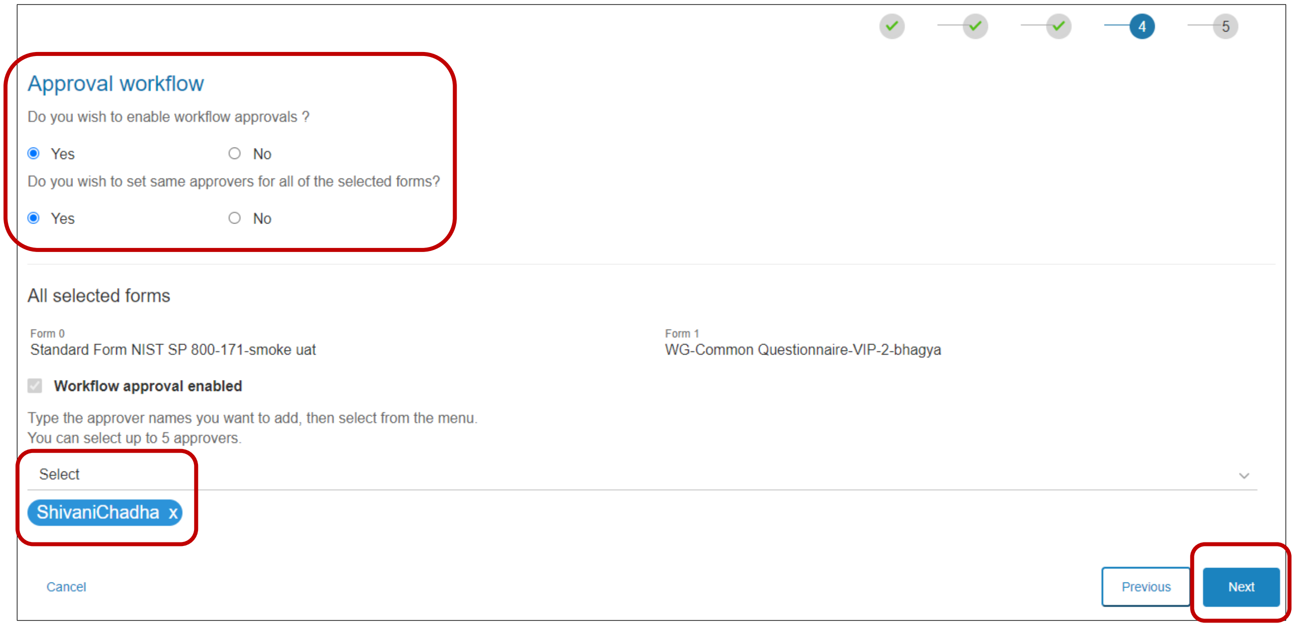


6. Type in the **Form Name** in the field provided. Click **Add.**

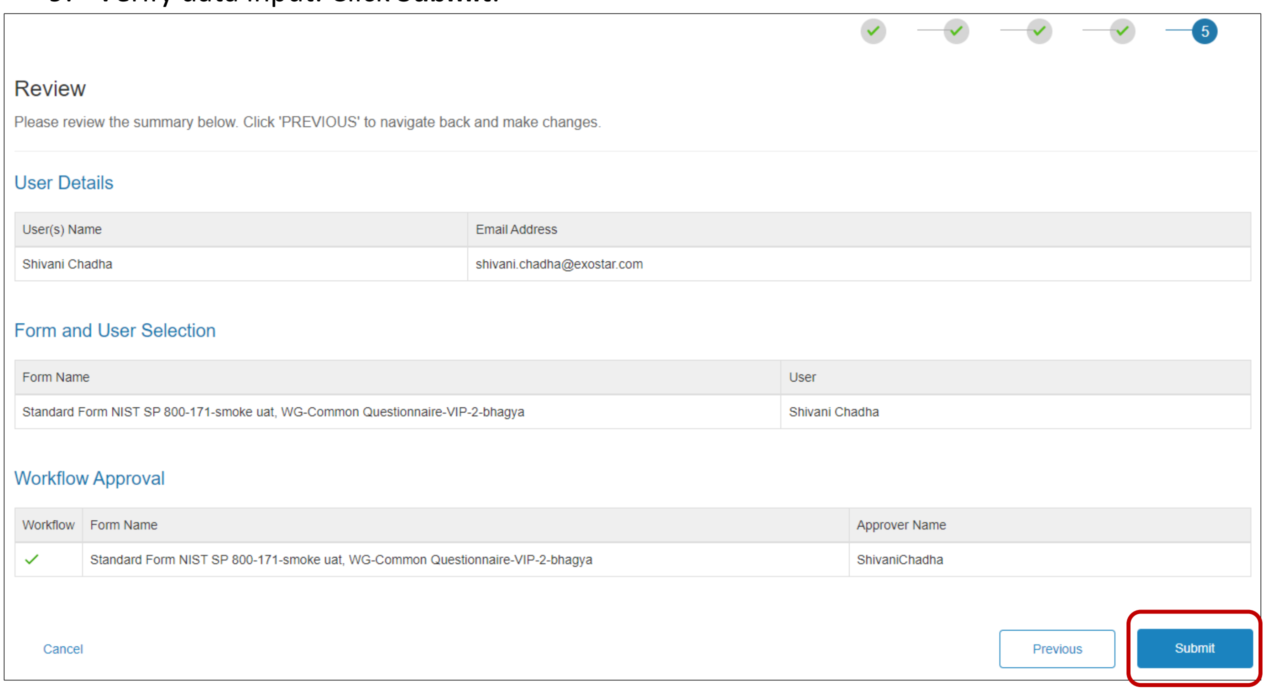
7. Select the user in the **Assign a user...** drop-down. Click **Next**.



8. Select the **Yes** to **Enable Approval Workflow**. Select **No** to NOT Enable Approval Workflow. Select **Yes** or **No** to determine the same set of Approvers, if you have added multiple forms. If enabled, assign a Buyer Approver. Click **Next.**



9. Verify data input. Click **Submit**.

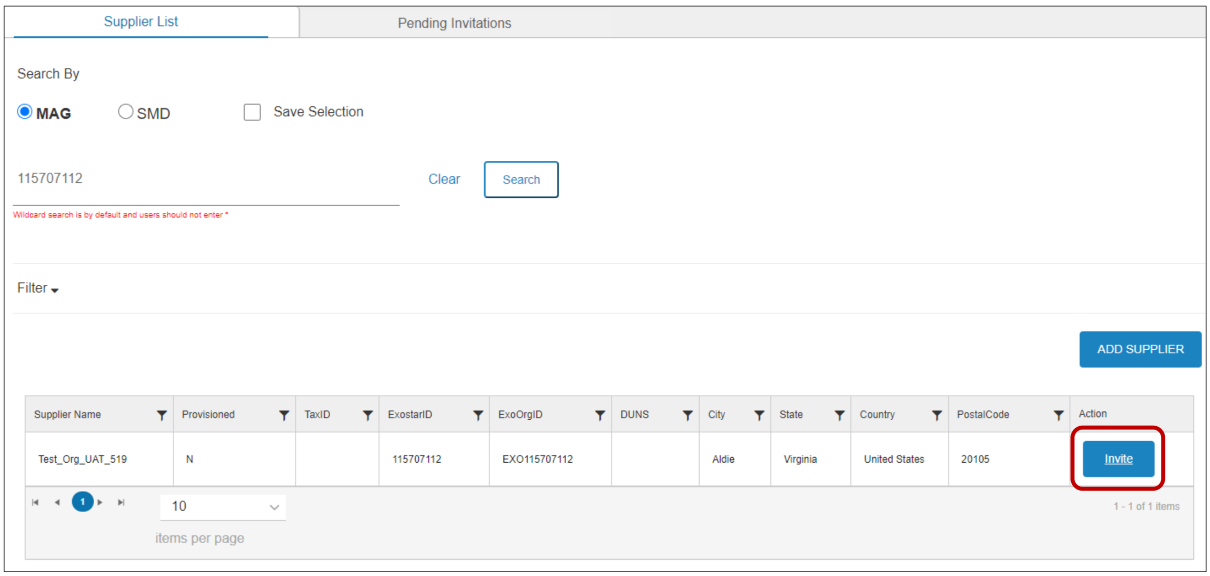


Add New Supplier

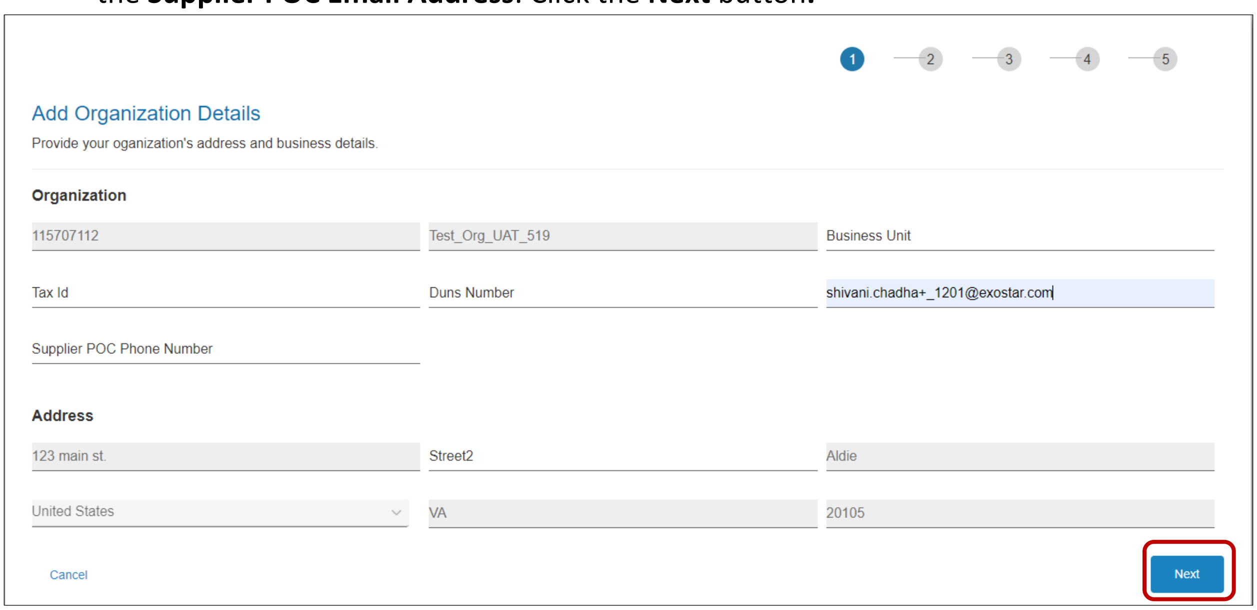
From the Supplier Search page, buyer organizations can invite existing MAG suppliers to the Onboarding Module. To invite existing MAG suppliers:

3. From the search results in the **Supplier Search** table, click the **Invite** button next to a non-provisioned supplier.

NOTE: If the Supplier is already provisioned to OBM, the **Invite** button will be displayed in white instead of blue. You must use the MAG Adoption Module for such an invitation. Also, invited suppliers have a clickable name to view their details.

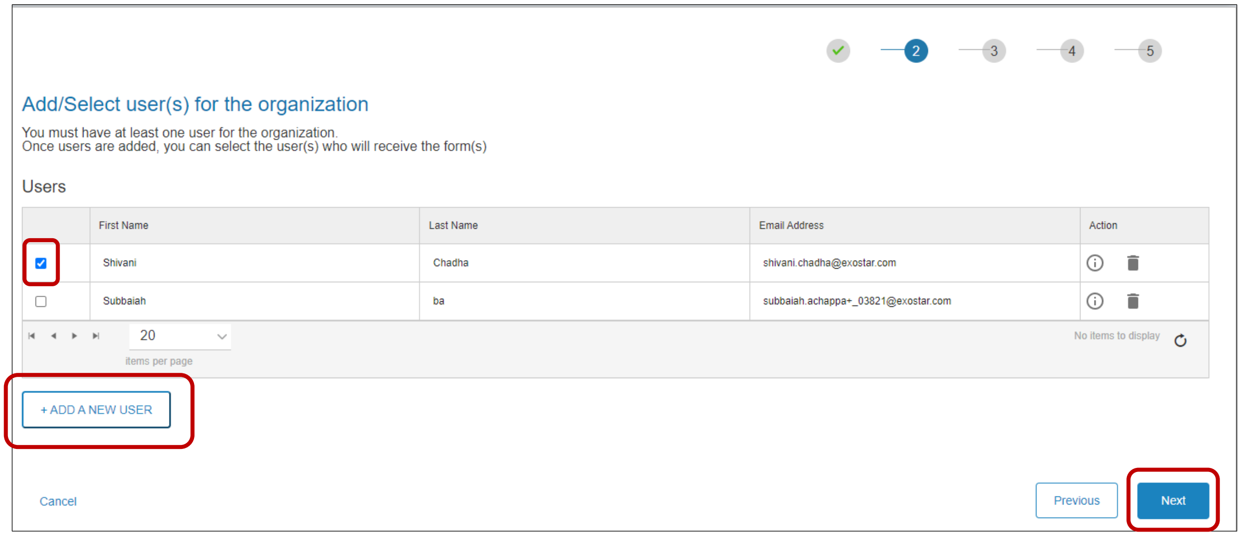


4. Review the supplier organization information on the **Organizational Details** screen. Input the **Supplier POC Email Address**. Click the **Next** button.

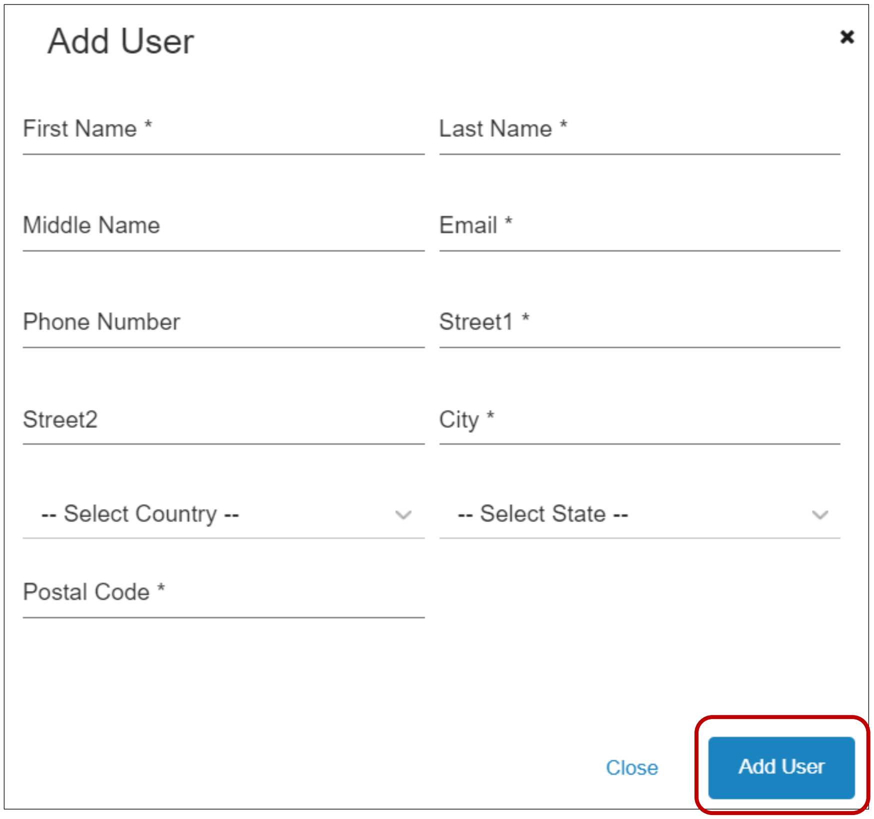


5. On the **User Details** screen, check the existing user you want to invite, and you can also add a new user by clicking the **Add New User** button. Click **Next**.

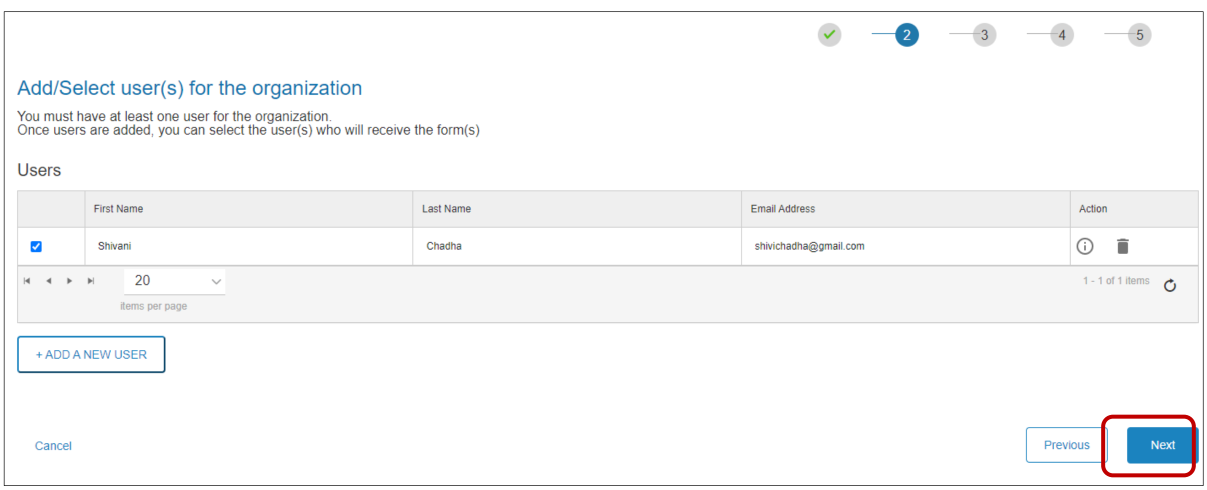
NOTE: You cannot invite a user to a shell organization in MAG, which means there should be at least one user displayed on the **User Details** page.



6. If a new user is also invited, add information about the user in the **Add New User** prompt. Click the **Add User** button.

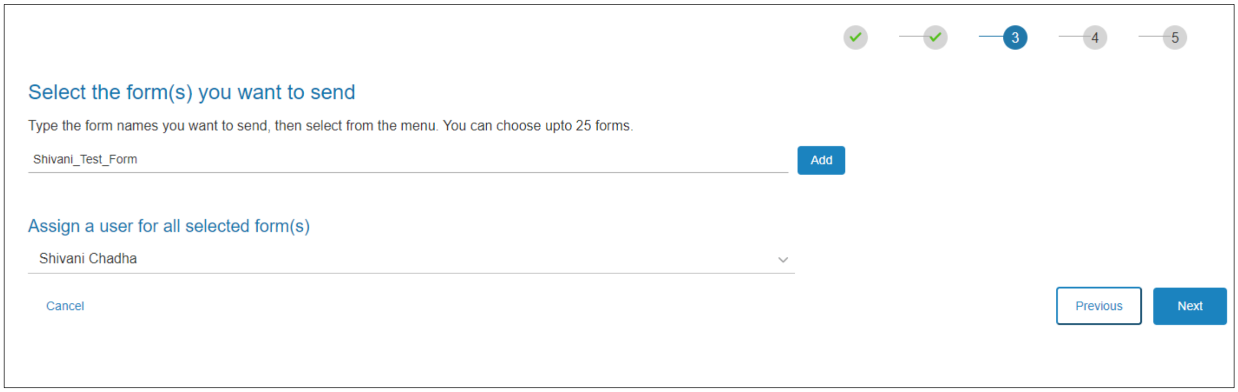


7. Once all users have been added, place checkmarks next to the users you want to invite. Click **Next**.

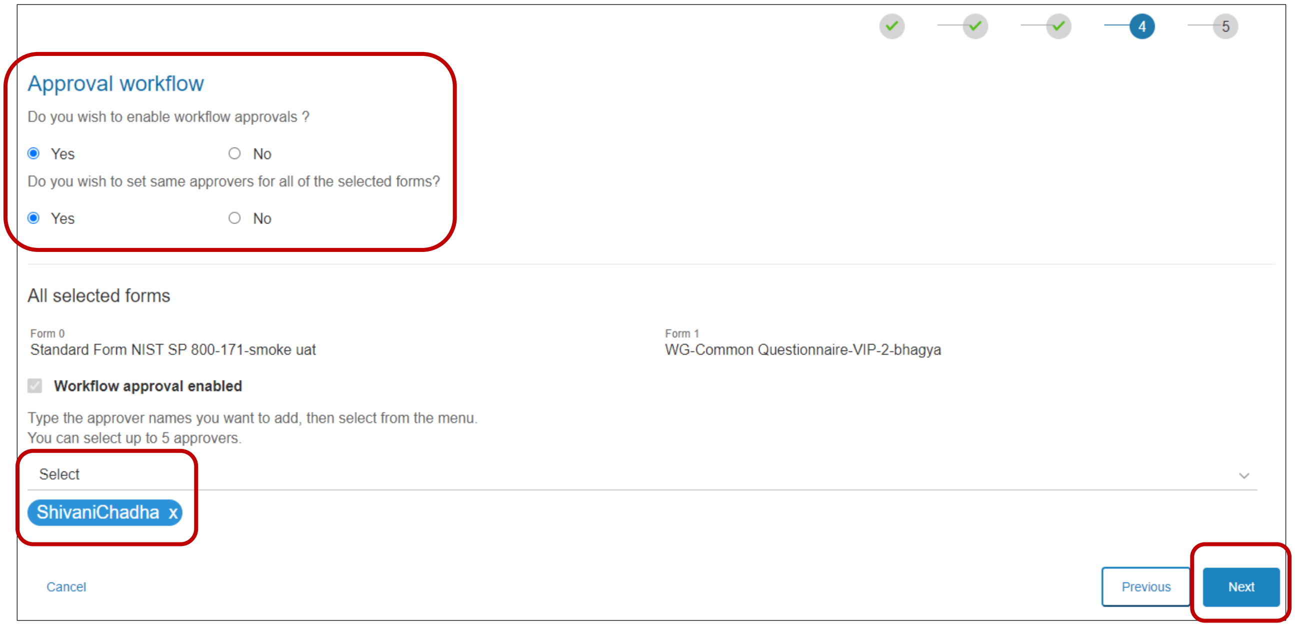


8. Type in the **Form Name** in the field provided. Click **Add.**

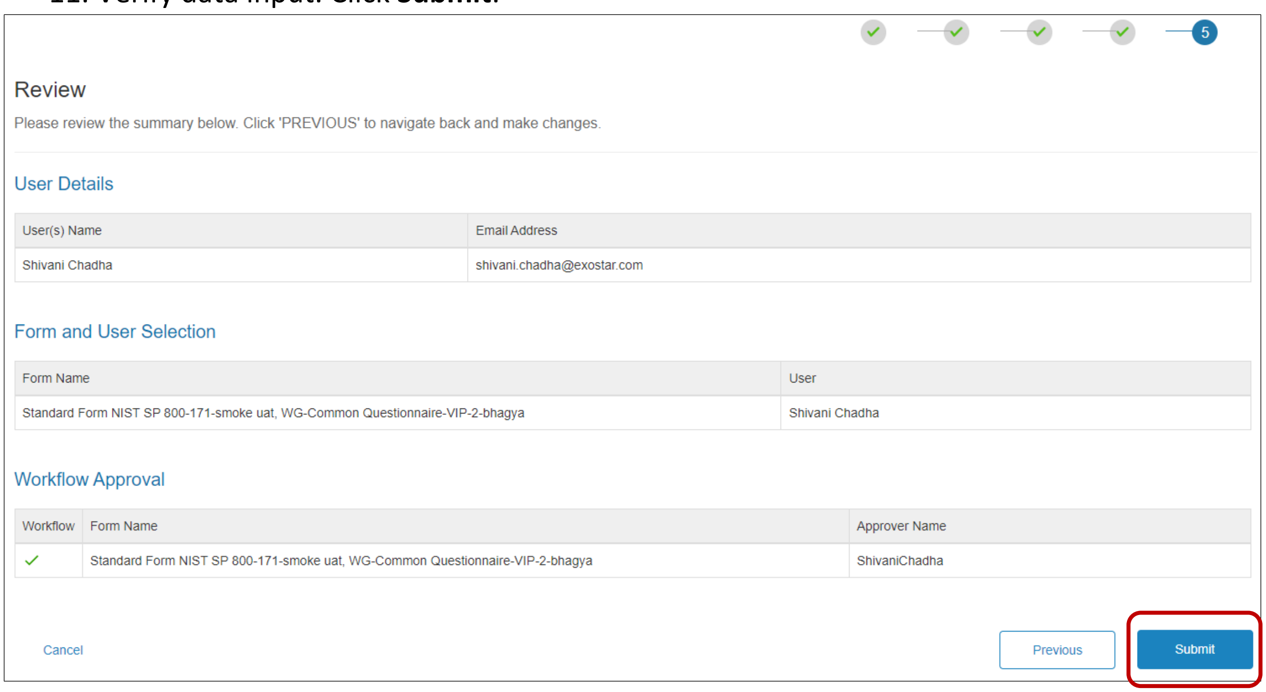
9. Select the user in the **Assign a user...** drop-down. Click **Next**.



10. Select the **Yes** to **Enable Approval Workflow**. Select **No** to NOT Enable Approval Workflow. Select **Yes** or **No** to determine the same set of Approvers, if you have added multiple forms. If enabled, assign a Buyer Approver. Click **Next.**



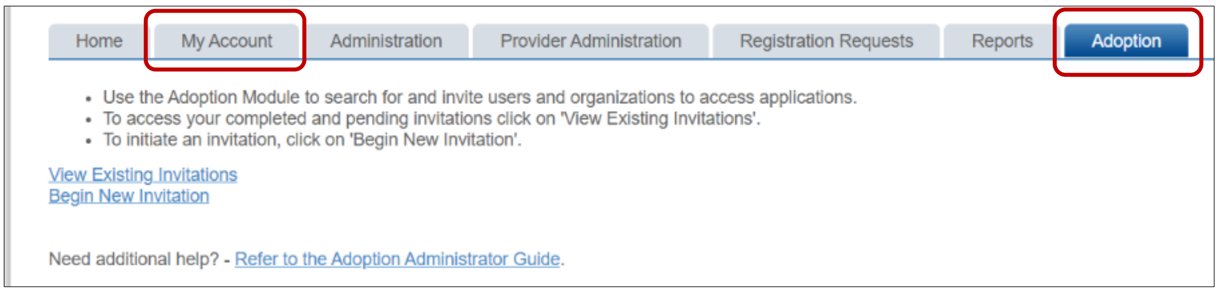
11. Verify data input. Click **Submit**.



Adoption Module Invitation

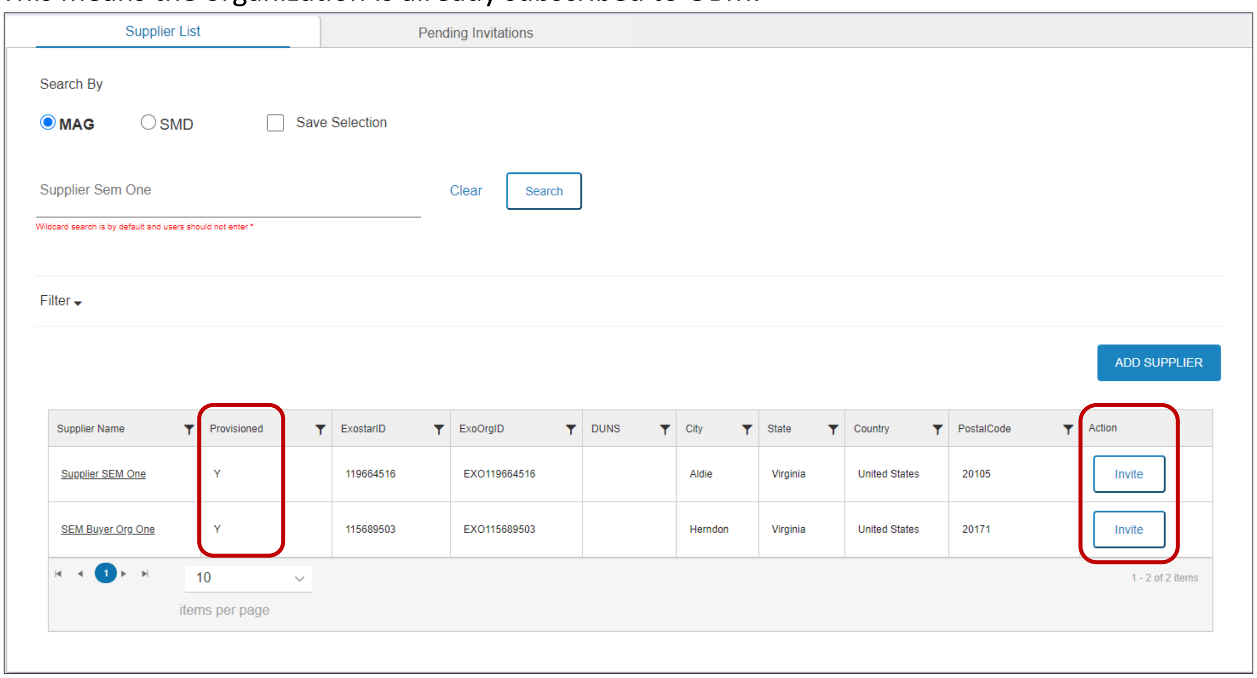
This section outlines scenarios when OBM cannot be used for invitations and Buyers must invite via the MAG Adoption Module.

IMPORTANT! To invite a Supplier to access OBM, a Buyer must have the Adoption Administrator role for the OBM application in MAG. Exostar must add this role to your user account. To verify you have this role, navigate to the My Account tab or view the Adoption tab. Please contact Exostar Customer Support to inquire about getting the Adoption Administrator role.



Scenario 1: Existing Org, Subscribed to OBM, Add New User

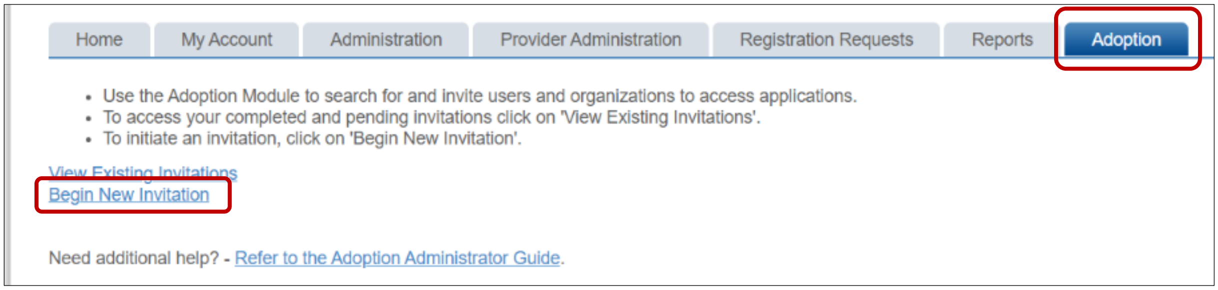
For this scenario, when a search is performed, the **Provisioned** flag is **Y** and **Invite** button is white. This means the organization is already subscribed to OBM.



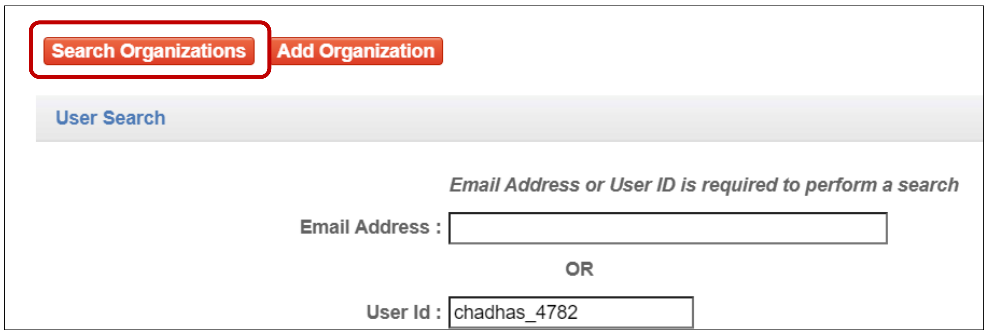
To invite a user to this organization, the Buyer must:

1. Navigate to https://portal.exostar.com and complete the MAG login.

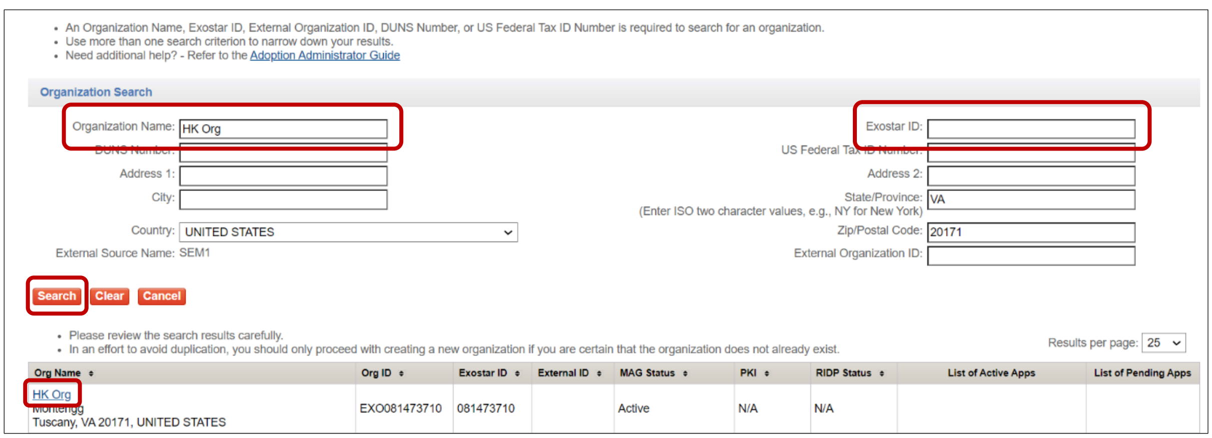
2. Select the **Adoption** tab. Click the **Begin New Invitation** link.



3. Click the **Search Organizations** button.

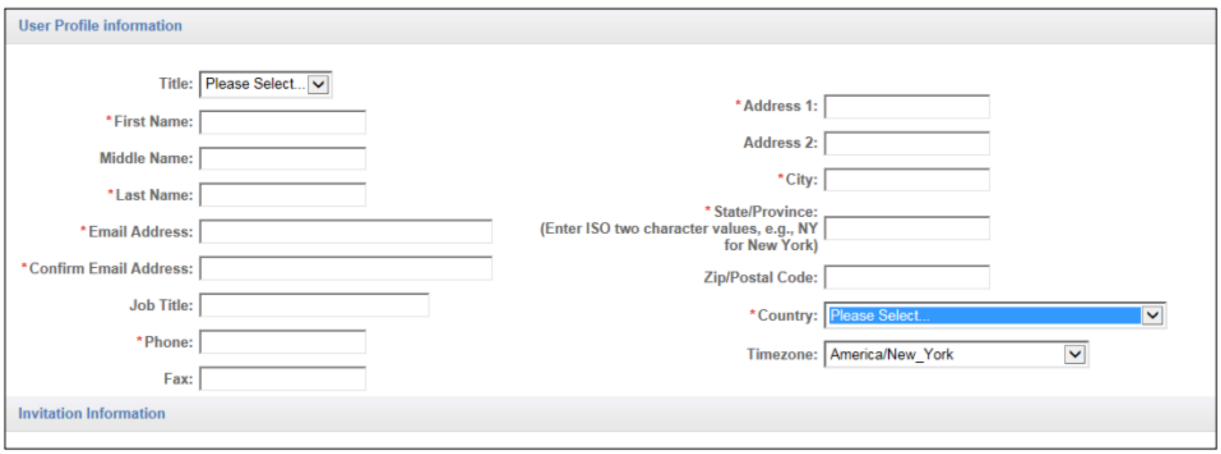


4. Input the **Organization Name** or **Exostar ID**, and as many details as necessary to locate the desired organization. Click **Search**. Select the hyperlinked **Org Name** in the search results.

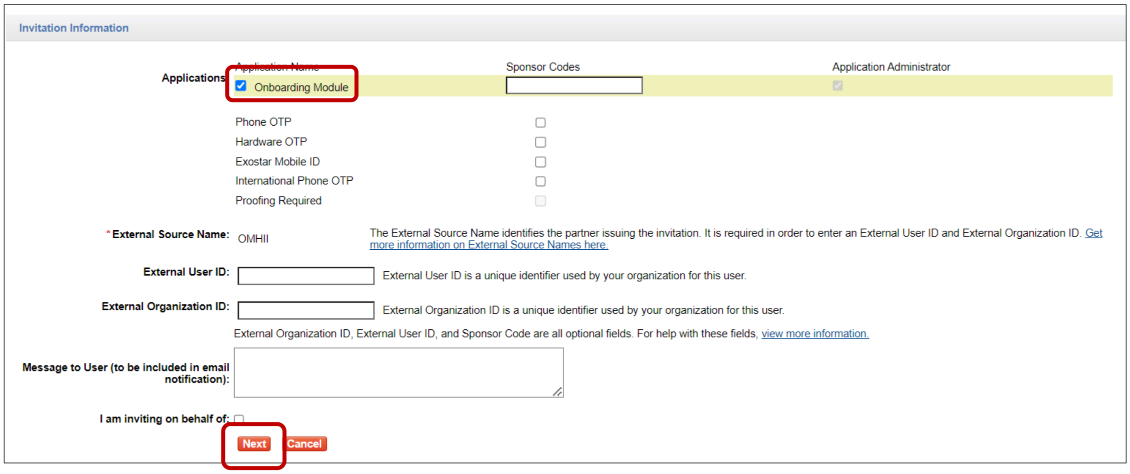


5. The **Organization Summary** page displays. In the **Actions** section, select **Invite New User**.

6. Input all required fields for **User Profile Information** section.

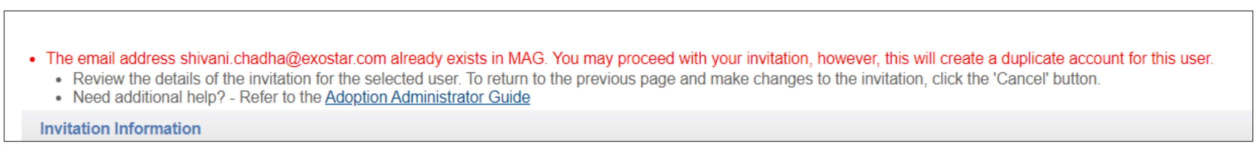


7. In the **Invitation Information** section, place a checkmark for the **Onboarding Module** application. Click **Next**.



8. Review the data input. Click **Submit** to complete adding the user.

NOTE: If you invite an existing MAG user (same email address attached to an existing user account), MAG displays a duplicate account soft warning. A Buyer can still submit and proceed with the invitation.



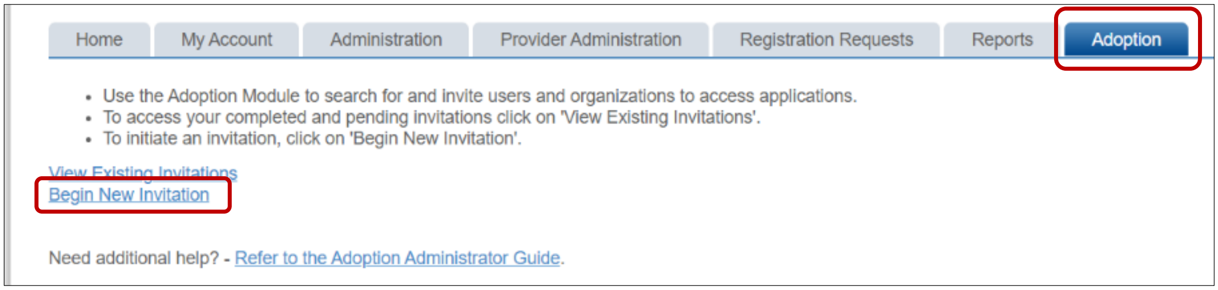
As the Adoption Administrator, you receive a notification once the user completes their invitation. The company's Organization Administrator also receives a notification alerting them the user is subscribed to an application.

Scenario 2: Existing Org Subscribed to OBM, Invite Existing User

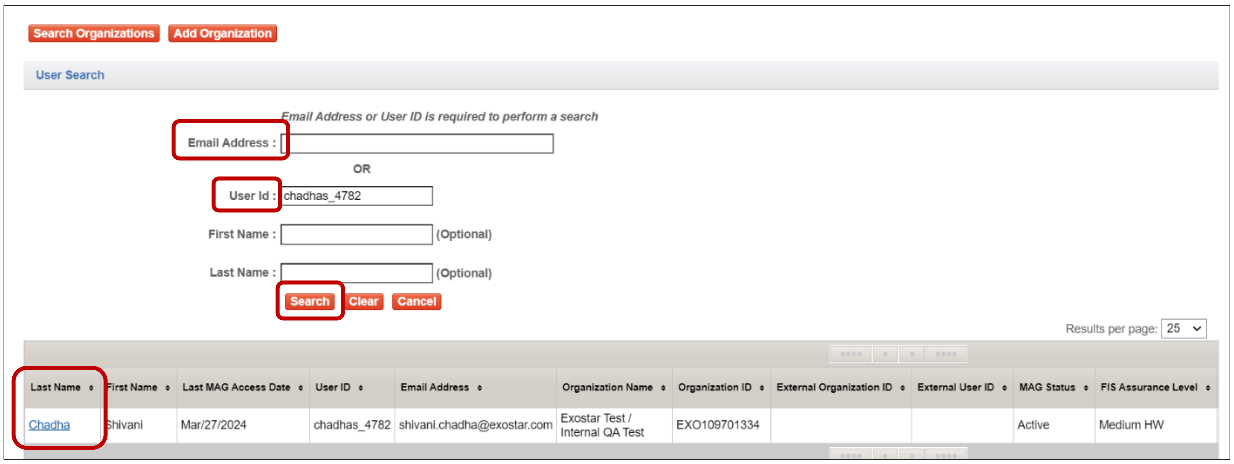
This scenario works under the assumption that the organization exists in MAG and is currently subscribed to OBM. The user exists in MAG as well but is not currently subscribed to OBM. To complete this invitation scenario:

1. Navigate to https://portal.exostar.com and complete the MAG login.

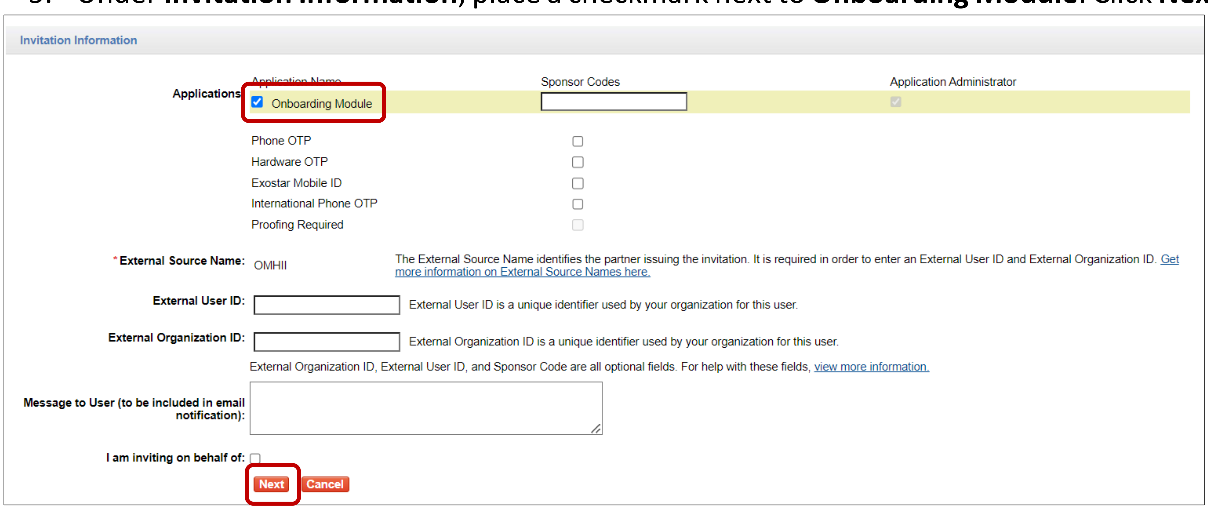
2. Select the **Adoption** tab. Click the **Begin New Invitation** link.



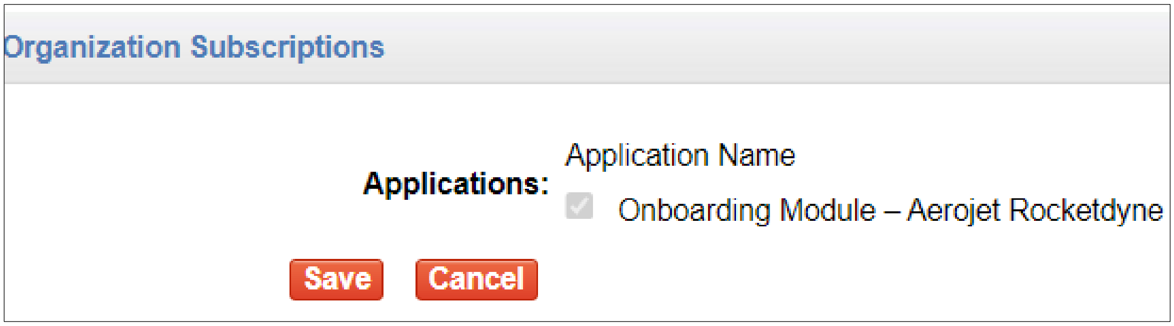
3. Input user's **Email Address** or **MAG User ID**. Click **Search**.
4. From the search results, select the desired hyperlinked **Last Name**.



5. Under **Invitation Information**, place a checkmark next to **Onboarding Module**. Click **Next**.

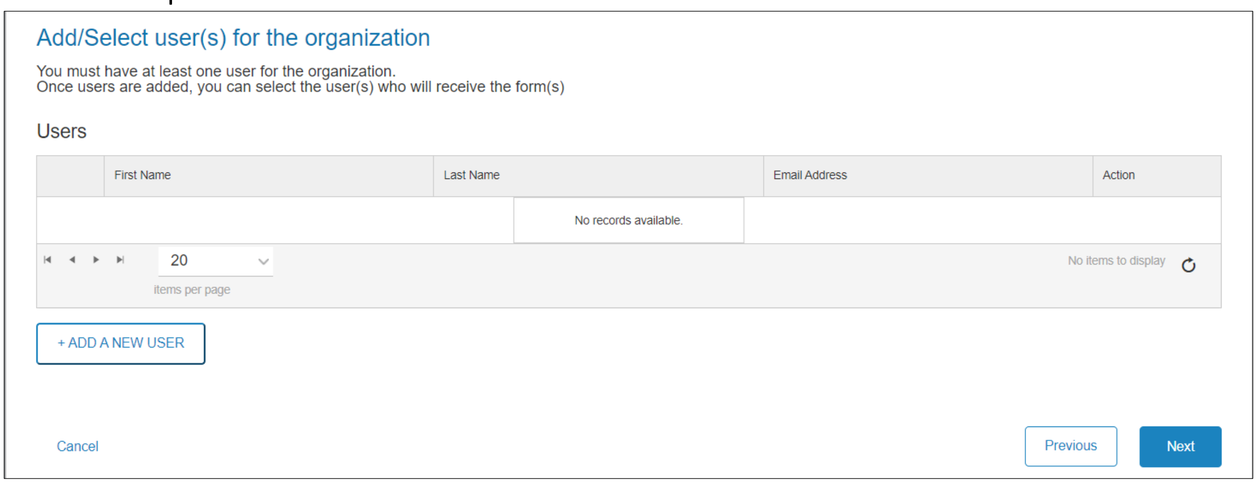


6. Click **Save**.



Scenario 3: Shell Orgs with NO Organization Administrator

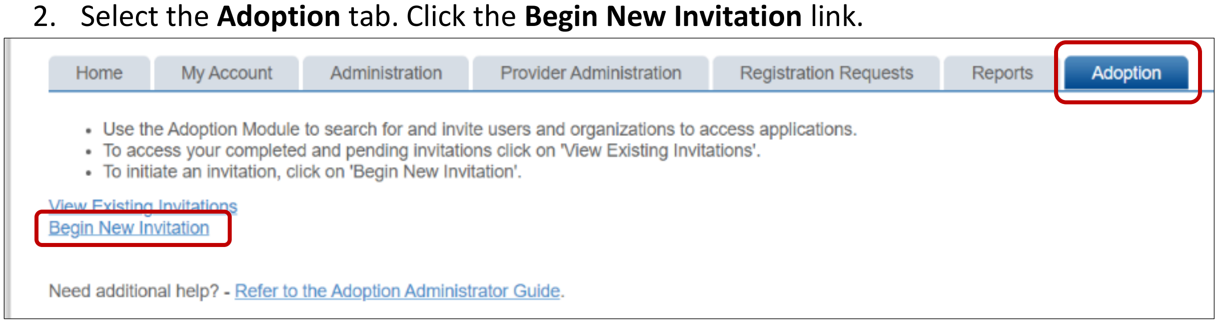
This scenario occurs when you search for an organization in OBM, you fill in the POC, and the user list page displays zero users listed in the organization. You cannot proceed in OBM and must user the Adoption Module.



IMPORTANT! If a user IS listed, you can proceed in OBM.

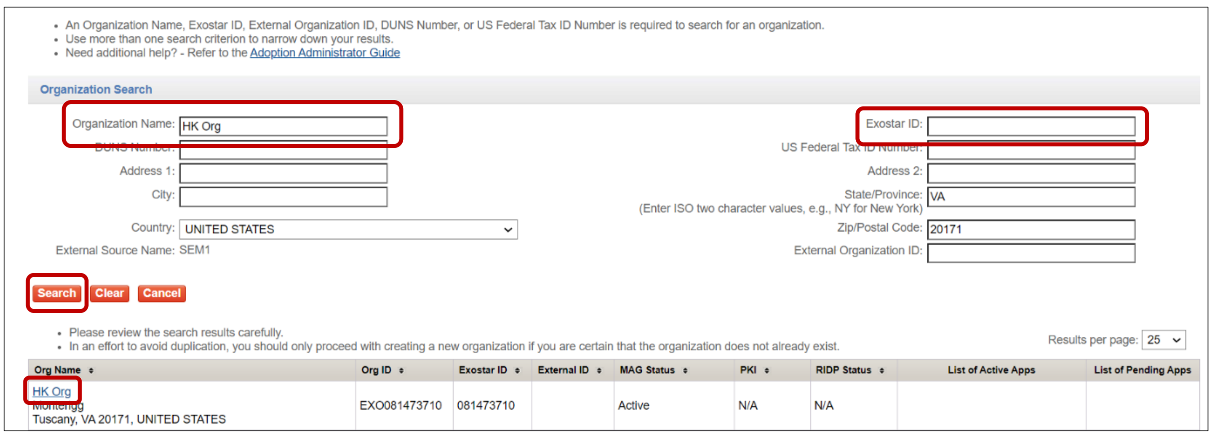
To proceed add a user to the shell account:

1. Navigate to https://portal.exostar.com and complete the MAG login.
2. Select the **Adoption** tab. Click the **Begin New Invitation** link.



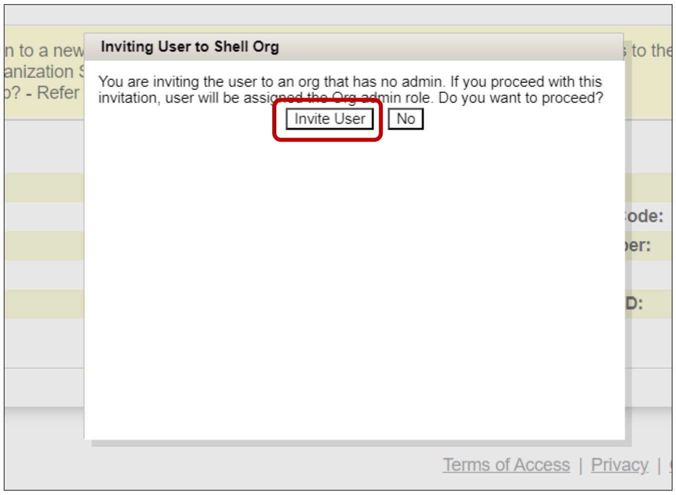
3. Click the **Search Organizations** button.

4. Input the **Organization Name** or **Exostar ID** (remove EXO), and as many details as necessary to locate the desired organization. Click **Search**. Select the hyperlinked **Org Name** in the search results.

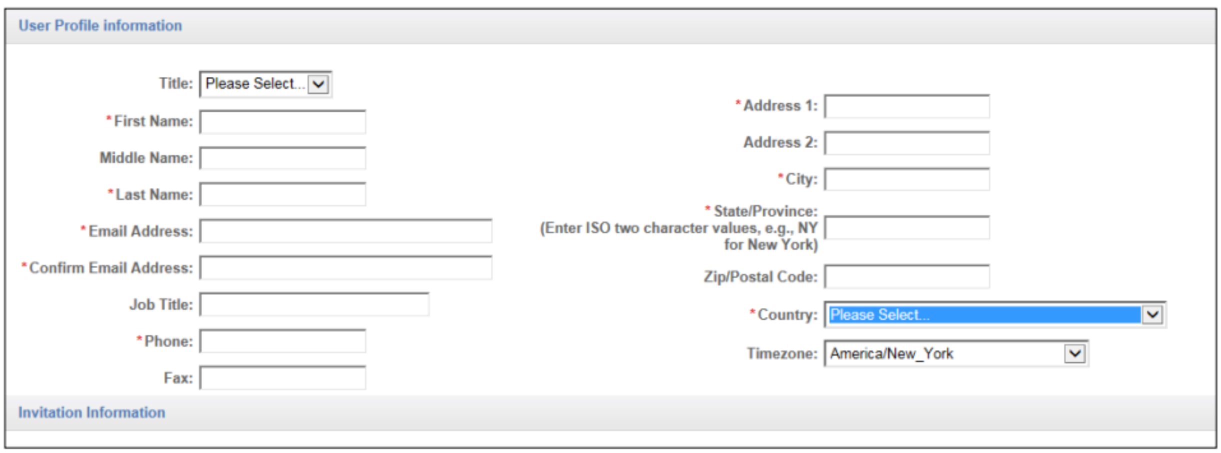


5. The **Organization Summary** page displays. In the **Actions** section, select **Invite New User**.

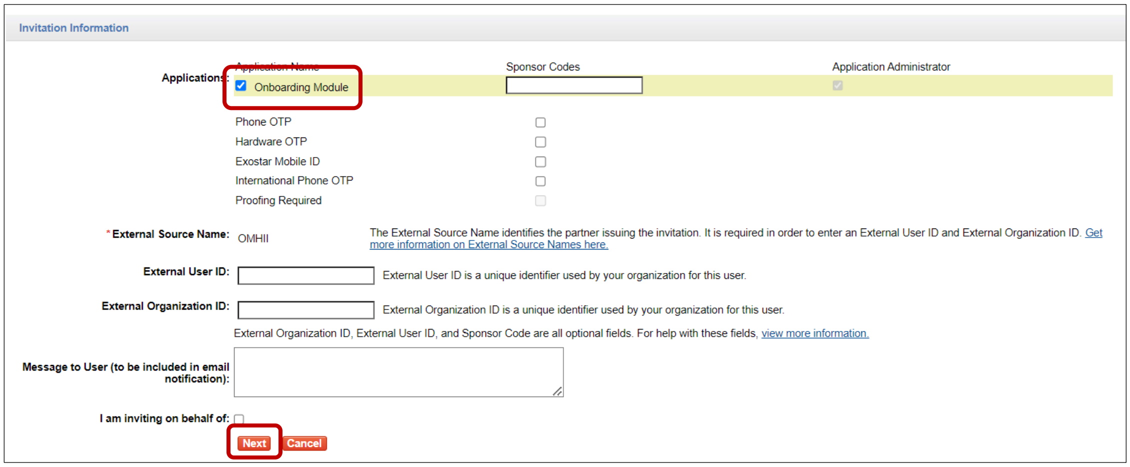
6. Since this organization does not currently have a user, a message displays notifying you this user will be assigned the Organization Administrator role. If you wish to proceed, click the **Invite User** button.



7. Input all required fields for **User Profile Information** section.

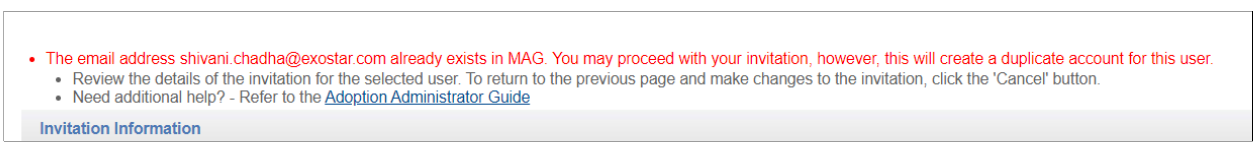


8. In the **Invitation Information** section, place a checkmark for the **Onboarding Module** application. Click **Next**.



9. Review the data input. Click **Submit** to complete adding the user.

NOTE: If you invite an existing MAG user (same email address attached to an existing user account), MAG displays a duplicate account soft warning. A Buyer can still submit and proceed with the invitation.



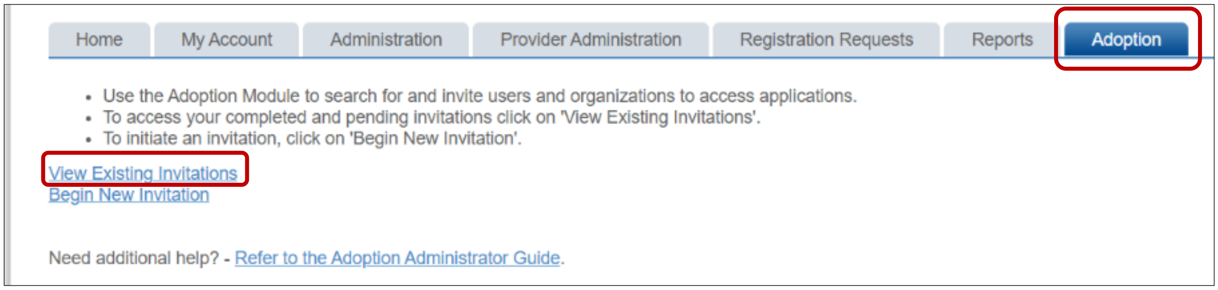
As the Adoption Administrator, you receive a notification once the user completes their invitation. The company's Organization Administrator also receives a notification alerting them the user is subscribed to an application.

Track Invitations

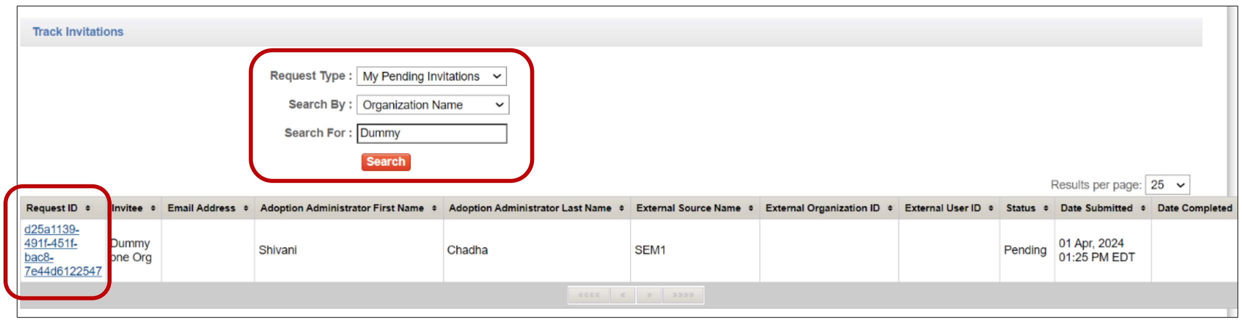
As an Adoption Administrator, you can track invitations sent by you or other Adoption Administrators for the same application to which you are assigned. To track invitations:

1. Navigate to https://portal.exostar.com and complete the MAG login.

2. Select the **Adoption** tab. Click the **View Existing Invitations** link.

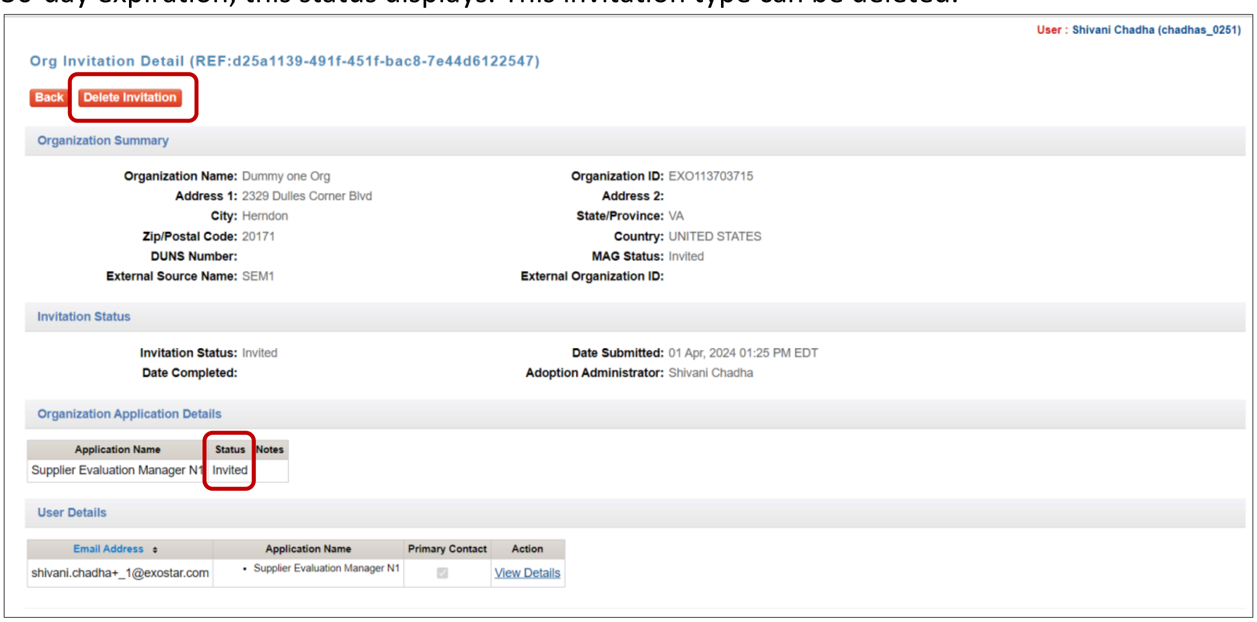


3. Select the desired search criteria. Click **Search**.
4. Select the hyperlinked **Request ID** to view the invitation.



Invitation Status

Invited: An email is sent to the user to accept the invitation. Until they accept, and before the 30-day expiration, this status displays. This invitation type can be deleted.



Expired: If the supplier does not accept the invitation in 30 days, the invitation expires and displays this status. You can delete and re-issue a new invitation in this case.

Supplier In Process: This status displays when the supplier acknowledges the invite. Please note, after this step, the invitation cannot be deleted.

Pending Exostar Approval: The organization is pending a DPL check. Please note, only a few organizations go through DPL checks.

Completed EPA Approval: The invitation is complete, and the user has been sent an **Account Activation** email.