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Purpose
This guide has been created for designated Organization Administrators. This guide will provide you information on the administrative tasks that you can perform to manage users within your organization. You can access MAG by logging on to: https://portal.exostar.com.

NOTE: This guide does not include information on processing User’s account requests or application subscription requests. Please refer to the Request Management Guide for information related to processing all user subscription requests.

When you login to https://portal.exostar.com with your credentials, the system automatically identifies your designation and presents your view of the dashboard. You will be presented with ‘Administration’ Tab and ‘Registration Requests’ tab in addition to the general ‘Applications’ and ‘My Account’ tabs.

This guide will provide you information on all the tasks under the Administration tab. The guide is divided into five chapters based on the sub-tabs under Administration, Registration Requests, My Account, and Reports:

- View Users
- Add New User
- Verify User
- Subscribe to Application
- Update Organization Contact
- Reports

Each section of the guide will provide information on specific tasks that can be accomplished by accessing the respective tab.
View Users

The following tasks may be completed via the View Users link:

- Search for Users within the Organization
- View and Edit User Profile
- Change User’s role within MAG
- Suspend/Activate User’s account
- Reset User’s one-time password
- Delete a user

Search for a user

To administer users within Exostar Portal, you must first find and select the desired user within your organization. From the ‘Administration’ tab, go to the ‘View Users’ link.

1. Enter your keyword in the ‘Search For:’ text box.

2. Select search filter criterion from the drop-down list. You have the option to search by:
   - Last Name
   - First Name
   - User ID
   - E-mail
   - Org ID
   - Organization Name
   - R-IDP User ID – If your organization is subscribed to Enterprise Access Gateway (EAG), you can search for the user by your native authentication UserID for the user.
3. Click on the ‘Search’ button and the results will display below the search area.
4. Click on the ‘Results Per Page’ drop-down and select an option. The default value is 25, but you can select from 10, 25, 50 or 100 results per page.

Notes:

- The number of users returned is subject to the system limit of 500.
- The search filter is NOT case sensitive and excludes leading and trailing spaces.
- Wild card (*) searching is inherent to the search filter. You need not enter a "*" character as it is already implied.
- You can select the number of results that you want on a page up to a 100 records.
- Use the Export Search Results button to generate a .csv file of your search results. Note that you will be able to export only 500 search results.
The Search Results page provides you a quick view of the results based on the selected filter. Click on the ‘User Details’ hyperlink as highlighted above to review and update user information such as contact details, application subscriptions etc. To modify the user account, refer to the View and Edit User Profile section.

By clicking on the ‘User ID’ hyperlink for the individual user the following User Profile page is displayed:

**View and Edit User Profile**

1. To update a user profile, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.
2. Click on the User ID link to access the user’s profile.
3. In the User Profile section you may update any field, excluding the User ID.

   Note: Only Org Admins may update information in the User Profile section.

The Modify Email option allows you to update a user’s email address. When an email address is modified by an Org Admin; the user receives an email containing an activation code and steps to follow in order to activate the new email address. The new email address is not reflected in MAG until the user completes the activation process. Note: If there is a digital certificate assigned to this user, the Modify Email option is not available.

4. Make any necessary changes and click Submit. A dialog box will be displayed asking “Are you sure you want to submit the changes.” Click OK to proceed.

5. ‘Restricted Access: ON/OFF’: This setting allows you to specify if this user can access Restricted Sites within the ForumPass application. If your Organization is subscribed to ForumPass and if the user needs access to restricted sites, this setting must be set to ‘ON’; else, this setting must remain ‘OFF’.

6. The confirmation page is displayed.

Change User’s Email Address

1. To modify the email address of a user within your organization, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.

2. Click on the User ID link to access the user’s profile.

3. Search for a user and go to the User Profile page for the user and click on ‘Modify Email’ button.
4. The ‘Modify Email’ page as below. Enter the new email address and click Continue.

5. A verification page will be presented. Confirm you would like to proceed with this action. Click Submit.

6. The system will initiate the following:
   - A confirmation email is sent to your email address.
   - An email with an ‘Activation Code’ is sent to the user’s old and new email addresses. To activate this email address in MAG, the user will need to click the ‘Change Email’ link on the My Account Tab during next login and enter the activation code.

**Note:** If the user forgets to activate the email address as described above, the new email address will never get activated and the system will continue to use the current email address for all user notifications.

**IMPORTANT:**
1. If the user is subscribed to FIS Certificates, you will need to revoke their certificates and then contact Exostar Customer Support to request email address changes.
2. If the user’s account has been linked to their corporate network account via Enterprise Access Gateway (EAG), you will not be able to change the user’s email address.

**Change User’s Role**
You can change the role of a user within your organization. Please note that this role shall apply only within MAG. For information on how to change a user’s role within a specific application, please visit the application’s webpage on [www.myexostar.com](http://www.myexostar.com).

3. To change a user’s role in MAG, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.
4. Click on the User ID link to access the user’s profile.
3. On the User Profile page, scroll to the ‘Application Settings’ section.

4. The following options are available when assigning a user role:
   - User - This role allows the individual to have no administrator role within Exostar MAG.
   - Organization Admin – This role allows the individual to also manage other users within Exostar MAG at the organization level.
   - Application Admin – This role allows the individual to also manage the application subscriptions of users within Exostar MAG at the organization level. If you select this option, you will need to specify the applications that you want this user to administer.
   - Organization Admin & Application Admin – This role allows the individual to manage other users as well as application subscriptions. If you select this option, you will need to specify the applications that you want this user to administer.

If you select an application administrator role, you will be presented with the list of applications that the organization is currently subscribed to. Select an application(s) for which this user shall serve as the Application Administrator.

5. Click on ‘Submit’ to complete changes to the user’s role.
6. A confirmation page is displayed to complete the role change.

**Request Access to an Application**

You can request access to Exostar enabled applications on the behalf of a user within your organization. Note that you can only request access to those applications for which your organization is subscribed to.

1. To request access to an application for a user, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.
2. Click on the User ID link to access the user’s profile.

![User ID Table]

3. On User Profile page, scroll to the ‘Application Settings’ section. To subscribe the user to an application, click on ‘Request Access’ button next to the application. This will initiate the application approval workflow for the application subscription. You can request access to multiple applications (if available).

![Application Access Table]

Note: If an Application Group is selected, a request for access to all applications in the group will be submitted.

4. **Sponsor Code**: This is an optional attribute for requesting access to an application. A sponsor code should be filled in if the user/administrator has been provided with a Sponsor Code by either Exostar or the sponsoring organization. If the user has been sponsored and you do not have the information, contact the sponsoring organization or [Exostar](https://exostar.com) for information to input in the Sponsor Code field.
5. Click on ‘Submit’ to complete changes to the user’s role.
6. A confirmation page is displayed to complete the role change.

**Suspend User’s Access to MAG and all applications**

On the User Details page in the **Application Settings** section, you may choose to suspend a user’s access to a specific application(s) or to MAG, and you may choose to permanently delete a user from the MAG database. You may also reactive users who were temporarily suspended.

A user will be notified by email of the suspension or deletion actions. And they will be presented with an appropriate error message when they attempt to access the application. Conversely, if an account is re-enabled, the user will receive an email advising them of the reactivation.

1. To suspend the user’s access to MAG or to a specific application, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.
2. Click on the User ID link to access the user’s profile.


4. To suspend a user, click on ‘Suspend’ button. You will be prompted to provide a suspend reason. If selecting a Reason of “Other”, a Reason Note will be required.

5. A confirmation page is displayed and the user’s access to MAG portal is suspended.

6. Once a user is suspended, you can return to this page to reactive.

**Note:** A user will not be able to access any subscribed application once their user account has been suspended. If the user has valid certificates, they will continue to be able to use their certificates.

**Reactivate User’s Access to MAG and all applications**

You can reactivate a user’s access to Exostar MAG and all the subscribed applications by following the steps below.

3. To suspend the user’s access to MAG, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.

4. Click on the User ID link to access the user’s profile.


4. To reactivate a user, click on ‘Enable User Access’ button (highlighted below). You will get a confirmation page and upon confirmation, the user's access to the MAG portal will be suspended.

**Reactivate User's Access to individual applications**

You can activate a user's access to a subscribed application by following the steps below.

5. To activate the user’s access to an application, go to ‘Administration’ tab and click on ‘View Users’
to search for the user account.

6. Click on the User ID link to access the user’s profile.


4. To activate a user, click on ‘Activate’ button next to the application name (highlighted below). You will get a confirmation page and upon confirmation, the user's access to the application will be re-activated.

---

**Delete User**

The ‘Delete User’ option provides the ability for you to permanently delete a user’s access to the MAG portal.

**IMPORTANT NOTES:**

- Once a user is deleted, user access cannot be reinstated and the user will not appear in any search results.
- To be able to access the MAG portal after deletion, the user has to self-register and be approved again or be registered by an administrator.
- When a user leaves the company or permanently no longer needs access to MAG, the user account should be deleted immediately.

---

1. To delete a user’s account, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.
2. Click on the User ID link to access the user’s profile.

4. Click the ‘Delete User’ button.
5. A message is presented indicating this is permanent operation and cannot be undone.

6. You will be prompted to provide a suspend reason. If selecting a Reason of “Other”, a Reason Note will be required.

7. Click ‘Submit’ to continue with the deletion. A Deactivate User Success message will be displayed.

**Reset One-time Password**

The One-time Password can be reset for users accounts that have been created but have not yet logged into the system. (I.e. the user is in 'Inactive' status). The Reset One-time Password option will be only available if the user is in the 'Inactive' status i.e. has not completed the First Time Login. The user may also retrieve their first time login credentials by referring to the [First Time Login Guide](#) for further information.

1. To reset the one time password, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.
2. Click on the User ID link to access the user’s profile.
3. Scroll to the ‘Application Settings' section with ‘Reset One-time Password’ button.
4. Click the 'Reset One-time Password' button.

5. Enter a new One-time Password as per the Password Strength Policy and Confirm the password.
6. Click on 'Submit' and you will be taken to a confirmation page.
7. The system will send out a new System-generated Password to the user's email address.

**IMPORTANT:** You must communicate the new One-time Password to the User. Both the System-generated Password and the One-time Passwords are required for the user while logging in for the first time.

### Reset Permanent Password

To reset the permanent password of a user whose account is active:

1. To reset the permanent password, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.
2. Click on the User ID link to access the user’s profile.

<table>
<thead>
<tr>
<th>User ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Email</th>
<th>R-IPD User ID</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>cambetos_5816</td>
<td>Cambetos</td>
<td>Teresa</td>
<td><a href="mailto:tambetos@gmail.com">tambetos@gmail.com</a></td>
<td>Org Admin, App Admin</td>
<td></td>
</tr>
<tr>
<td>johnsonk_8495</td>
<td>Johnson</td>
<td>Kelly</td>
<td><a href="mailto:kellyjohnson@exostar.com">kellyjohnson@exostar.com</a></td>
<td>Org Admin, App Admin</td>
<td></td>
</tr>
</tbody>
</table>

1. Scroll to the 'Application Settings' section with 'Reset Permanent Password' button.
2. Click Reset Permanent Password.
3. The password is automatically reset and an email containing the new system-generated password and login instructions is sent to the user.

### Delink an EAG Account

MAG accounts which have been linked to corporate login credentials can be delinked by the Organization administrator.

1. To delink an account, go to ‘Administration’ tab and click on ‘View Users’ to search for the user account.
2. Click on the User ID link to access the user’s profile.

<table>
<thead>
<tr>
<th>User ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Email</th>
<th>R-IPD User ID</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>cambetos_5816</td>
<td>Cambetos</td>
<td>Teresa</td>
<td><a href="mailto:tambetos@gmail.com">tambetos@gmail.com</a></td>
<td>Org Admin, App Admin</td>
<td></td>
</tr>
<tr>
<td>johnsonk_8495</td>
<td>Johnson</td>
<td>Kelly</td>
<td><a href="mailto:kellyjohnson@exostar.com">kellyjohnson@exostar.com</a></td>
<td>Org Admin, App Admin</td>
<td></td>
</tr>
</tbody>
</table>

3. Scroll to the bottom of the user profile page to the Enterprise Access Gateway (EAG) Account
Settings section. Click **Unlink Accounts**.

4. A confirmation page is displayed and the account is delinked. The user will receive an email advising that the account has been delinked. The email also provides instructions on how to remove the cookie from the machine.

**Add New User**

The ‘Add New User’ link provides the ability to add a new user within your organization to access applications and services via Exostar MAG.

1. To add a new user, go to ‘Administration’ tab and click on ‘Add New User’ link.
2. In the **Add New User** section complete all the required fields as denoted by the asterisk (*). You must include the user’s full legal name.

**One-Time Password:** The one-time password will be used during the user’s first time login. It is your responsibility to communicate the one-time password to the user. **Without this information the user WILL NOT be able to log in.** Note: The password rules will display on the Add New User screen.

**Restricted Access:** Restricted Access is applicable for the ForumPass application only. Only select ‘On’ if the user will have a Restricted profile within the ForumPass application. If unsure, please consult Exostar’s Customer Service Team.
3. In the Application Settings section of the page, select a Role for the new user. Roles include User, Organization Admin, Application Admin and both Organization Admin and Application Admin.

If you select User, you may then designate the Application(s) the user should have access to. Note: The list of application options will include all applications to which the organization is subscribed.

If Application Admin, or Organization Admin & Application Admin role is selected, you may also designate the applications that this user will be authorized to administer. Be careful to select the correct applications. If not, Exostar will not process the request.

Note: The Sponsor Code fields that appear on the New User page as well as an existing User’s detail page are optional fields. Exostar will advise you if you need to complete these fields. If you have not received direction on this, then please leave the fields blank. Click on the ‘view more information’ link for additional information.

4. Click Continue.
5. Review and verify the information you have entered. Click Submit.
6. A confirmation page is displayed.

At this time, the system will create the user's account, start application access workflows if any, and send out the following emails:
- Welcome email to the user with User ID
- Email to the user with system generated password
- Email to the Organization Administrator with information that a new account has been created.
- Once the user's access to an application is approved, the user will receive an 'Access Approved' notification email.

Verify User's Registration Request
An Organization Administrator is responsible for certifying a user's affiliation with the organization and verifying the user's self-registration request.
1. On the 'Registration Requests' tab under the Verify page, you will see the list of requests awaiting your verification/approval. This is your 'Requests Inbox'.
   - You will be able to filter the requests by the status of 'New' and 'Pending'.
   - You will be able sort the table by clicking on the column headers.
2. Select a request and click on the ‘Request'.

3. The User Registration Request page is presented.

**NOTE:** The ‘Select User’ option will generate results only if you are subscribed to Lockheed Martin’s P2P Application.
4. **Sponsor Code**: This is an optional attribute for requesting access to an application. If it is not already filled-in by the user, a sponsor code should be filled-in, if the user has been sponsored. If you do not have the information, contact the sponsoring organization or Exostar for information to input in the Sponsor Code field.

5. Click on 'Next' button to go to the next page.

6. If you want to approve this request, you must answer 'Yes' to both questions on this page.
7. If you opt to deny this request, you will be prompted to enter a denial reason.

8. After you select to approve or deny a request, you will be presented with a confirmation message.

9. If the request was approved, the system will send out the welcome emails to the user with the UserID and password and will start the application access approval workflow based on the application(s) selected.

10. If the request was denied, the system will send out an email to the user that the registration request was denied.

11. After a request is approved or denied, the request will be removed from your 'Requests Inbox' and you will receive an email notification.

NOTE: Once you have started to process the user’s authorization request, ensure that you either complete the process or click ‘Cancel’ to ensure that the request is available to other organization administrators for further action.

Subscribe to Application

As an Organization Administrator, you are able to perform the following tasks:

- Subscribe your organization to Federated Identity Service (FIS), if not already subscribed; or
- Upgrade your organization’s Level of Assurance to Medium Level of assurance (Software) for Federated Identity Service (FIS) for an existing subscription.
- Subscribe to all other applications

Subscribe to FIS

Follow the steps below to complete these tasks:

Step 1: Subscribe

1. To subscribe to FIS go to ‘Administration’ tab and click on ‘Subscribe to Application’ link.
2. The ‘Subscribe to Application’ page will be presented.
3. Click on ‘Subscribe to Application’ next to the application name.

4. The following screen will be presented.
   a. Number of Certificates – You do not need to provide information in this field. This is not a required field.
   b. Provide the FIS Administrator information. You may enter new information by selecting ‘Other’ or select from the drop-down list of users within the organization to designate the FIS Administrator role.
   c. If entering a new user’s information, make sure you enter all the required fields and click on ‘Next >>’ button to complete the subscription process. If an existing user is selected, the following screen is presented. Click ‘Next>>’.
5. Enter the Authorized Officer information. You may select the FIS Administrator, an existing user, or Other. Click ‘Next >>’.

6. The Submission Confirmation screen will be presented.
Step 2: Exostar approval

You will be presented with a confirmation page. The following activities will take place once the subscription request has been submitted:

1. **Payments:** Exostar Membership Services will provide the instructions for payment prior to approval of your registration request.
2. Once all payment requirements have been completed, Exostar will complete the approval process. On successful approval, automated notifications will be sent out with information on next steps.
3. Organization Administrator will receive an approval notification; and
4. Designated FIS Administrator will receive notification of FIS Subscription.

Step 3: Accept Terms and Conditions

Once the Organization Administrator receives the approval notification from Exostar, they will need to accept the Terms & Conditions online. If the organization has multiple Organization Administrators, these Terms & Conditions may be accepted by any ONE Organization Administrator. To sign-off on Terms & Conditions:

1. Login to your MAG account by accessing the following URL: [https://portal.exostar.com](https://portal.exostar.com).
2. On the Applications tab, the status for FIS Application will be shown as ‘Pending Acceptance of Terms & Conditions’
3. Click on ‘View Service Agreement’ next to FIS Application name.
4. You will be displayed the Terms & Conditions for FIS based on whether your organization was approved for FIS Basic or FIS Medium Level of Assurance.
5. Click on ‘Accept’ to complete the sign-off.

Once the Organization Administrator accepts the Terms & Conditions, the FIS application status changes to ‘Active’ and the FIS Administrator is now able to approve user FIS Subscription requests. The Organization Administrator(s) will receive an Adobe PDF version of the agreement via email on completion of the acceptance.

After your organization is subscribed to an application, users within your Organization can request access to FIS application.

Upgrade to Medium Software:

**Step 1: Subscribe**

1. To upgrade your organization’s subscription to Medium Software, login to your Exostar MAG account.
2. Go to ‘Administration’ tab and click on ‘Subscribe to Application’ link (highlighted below).
3. The ‘Subscribe to Application’ page will be presented as below:
4. Click on ‘Upgrade Organization to Medium Level Assurance’ next to the application name.

5. Enter the number of certificates required and click ‘Next>>’.

6. A confirmation page is displayed.

Step 2: Exostar approval
You will be presented with a confirmation page. The following activities will take place once the subscription request has been submitted:

1. **Payments:** Exostar Membership Services will provide the instructions for payment prior to approval of your registration request.
2. Once all payment requirements have been completed, Exostar will complete the approval process. On successful approval, automated notifications will be sent out with information on next steps.
3. Organization Administrator will receive an approval notification; and
4. Designated FIS Administrator will receive notification of FIS Subscription.

Step 3: Accept Terms and Conditions
Once the Organization Administrator receives the approval notification from Exostar, they will need to accept the Terms & Conditions online. If the organization has multiple Organization Administrators, these Terms & Conditions may be accepted by any ONE Organization Administrator. To sign-off on Terms & Conditions:

1. Login to your MAG account by accessing the following URL: https://portal.exostar.com.
2. On the Applications tab, the status for FIS Application is shown as ‘Pending Acceptance of Terms & Conditions’
3. Click ‘View Service Agreement’ next to FIS Application name.
4. The Terms & Conditions for FIS are displayed based on whether your organization was approved for FIS Basic or FIS Medium Level of Assurance.

5. Click ‘I Agree’ to complete the sign-off. A message will be displayed to confirm the acceptance of service agreement.

After your organization is subscribed to an application, users within your Organization can request access to FIS application.

What if the Organization Administrator declines the Terms & Conditions?
1. If an Organization administrator declines the Terms & Conditions, the status of FIS Application on the Applications tab will continue to display as ‘Pending Acceptance’.
2. The Organization Administrator can click on ‘View Service Agreement’ next to FIS Application name and complete acceptance at any other time.
Subscribe to other Exostar applications: Follow the steps below to complete these tasks:

Step 1: Subscribe

1. To subscribe to Exostar’s other applications go to ‘Administration’ tab and click on ‘Subscribe to Application’ link (highlighted below).
2. The ‘Subscribe to Application’ page will be presented as below:

![Subscribe to Application Page](image)

3. Click on ‘Subscribe to Application’ next to the application name.
4. The following screen will be presented. Provide the Application Administrator information. You may enter new information by selecting ‘Other’ or select from the drop-down list of users within the organization to designate the FIS administrator role.

![Enter Application Administrator Information](image)

5. If entering a new user’s information, make sure you enter all the required fields and click on ‘Next >>’ button to complete the subscription process. If an existing user is selected, the
6. Click ‘Next>>’. The Submission Confirmation screen is presented.
Step 2: Exostar approval

You will be presented with a confirmation page. The following activities will take place once the subscription request has been submitted:

- **Payments**: Exostar Membership Services will provide the instructions for payment prior to approval of your registration request.
- Once all payment requirements have been completed, Exostar will complete the approval process. On successful approval, automated notifications will be sent out with information on next steps.
- Organization Administrator will receive an approval notification; and
- Designated application administrator will receive notification of account upgrade to the role.

Step 3: Accept Terms and Conditions

Once the Organization Administrator receives the approval notification from Exostar, they will need to accept the Terms & Conditions online. If the organization has multiple Organization Administrators, these terms & conditions may be accepted by any ONE Organization Administrator.

To sign-off on Terms & Conditions:

1. Login to your MAG account by accessing the following URL: [https://portal.exostar.com](https://portal.exostar.com).
2. On the Applications tab, the status for application will be shown as ‘Pending Acceptance of Terms & Conditions’.
3. Click on ‘View Service Agreement’ next to application name.
4. The Service Agreement will be displayed for your review.
5. Click on ‘Accept’ to complete the sign-off.

NOTE: For Application Groups Administrators will only have to accept one set of Terms and conditions/Service Agreements. For detailed information on the application status, refer to section [User Application Subscription Status Information](#).

Once the Organization Administrator accepts the Terms & Conditions, the application status changes to ‘Active’ and the application administrator is now able to approve user subscription requests. The Organization Administrator(s) will receive an Adobe PDF version of the agreement via email on completion of the acceptance.

After your organization is subscribed to an application, users within your Organization can request access to the application.

**NOTE**: For the following tasks, you will need to contact Exostar Customer support by completing the online form at: [http://www.myexostar.com/contactSupport.aspx](http://www.myexostar.com/contactSupport.aspx):

- Invitation-only applications; OR
- Upgrade your Organization’s FIS subscription to Medium Level of Assurance (Hardware).
Update Organization Contact
To modify your organization’s main contact, view your organization’s details in the My Account tab. Note that organization details are available to all users in your organization. Only organization administrators are allowed to update the organization contact.

1. Go to ‘My Account’ tab and click on ‘View Organization Details’.
2. In the Organization Contact section, click on ‘Update Organization Contact’ (highlighted below).
3. The Change Organization Contact page will be displayed.

Organization Has Organization Contact
If your organization has an organization contact specified. You can either update the information of the existing organization contact, create a new organization contact, or select a new organization contact from a list of existing users in your organization.

Select the option ‘Select an existing User as Company Contact’ if the company contact already has a MAG account. Select the option ‘Create a new Contact’ if the new organization contact does not have a MAG account.

To update the existing organization contact’s information, make changes to the fields that need modification and click Submit. The page will refresh with a confirmation that the contact was successfully updated.
To add an organization contact who does not already have a MAG account:

1. Select the ‘Create a new Contact’ option under Change Organization Contact.

   ![Create a new Contact](image)

2. Enter contact’s full legal name and address information. Required fields are marked with a red *.
3. Click the ‘Submit’ button.
4. The page will refresh with a confirmation that the contact was successfully updated.

   **NOTE:** A MAG account will NOT be created for a new organization contact. If a MAG account is required for this user, you must create an account in Administration → Add New User.

To select an existing user in your organization as the Organization Contact:

1. Check the option ‘Select an existing User as Company Contact’.

   ![Select an existing User as Company Contact](image)

2. Click on ‘Lookup User’.
3. Start typing the first name of the user in the text box. If there are users in the organization matching the name typed, a dropdown box will display with the user’s full name.
4. Select the user who should be the company contact from the dropdown.
5. Click the ‘Select’ button next to the text box.
6. The page will refresh with the user’s Name and Email Address.
7. Click the ‘Submit’ button. The page will refresh with a confirmation that the contact was successfully updated.

**Organization Does Not Have Organization Contact**

If your organization does not have an organization contact specified, you will be able to add an organization contact. By default ‘Create a new Contact’ is selected.

To add an organization contact who does not already have a MAG account:
1. Enter contact’s full legal name and address information. Required fields are marked with a red *.
2. Click the ‘Submit’ button.
3. The page will refresh with a confirmation that the contact was successfully updated.

**NOTE:** A MAG account will NOT be created for a new organization contact. If a MAG account is required for this user, you must create an account in Administration → Add New User.
To select an existing user in your organization as the Organization Contact:

1. Check the option ‘Select an existing User as Company Contact’.

2. Click on ‘Lookup User’.
3. Start typing the first name of the user in the text box. If there are users in the organization matching the name typed, a dropdown box will display with the user’s full name.
4. Select the user who should be the company contact from the dropdown.
5. Click the ‘Select’ button next to the text box.
6. The page will refresh with the user’s Name and Email Address.
7. Click the ‘Submit’ button. The page will refresh with a confirmation that the contact was successfully updated.

Reports
To run a report and export the details of all users in your organization, go to Reports and click on “Select” to run the “Organization User Details Report”.
Select the format for exporting the results and click “Process Report”.

The system will open a new browser window and display the following message while the report is being generated:

“Please wait while the report is getting generated. Please close this browser window once the report is generated successfully.”

Your browser will prompt you to Open or Save the report. Once you have received the prompt from your browser to Open or Save the report, you can then close the new browser window.

The report will include the following information:
User ID  
Last Name  
First Name  
Email  
Address  
RIDP User ID  
User Status  
User Roles  
Active Applications  
Pending  
Applications

Email Settings

To manage your email notifications, click on the icon next to the “Logout” button in the top right corner of the Managed Access Gateway header and select ‘Email Settings’.

Use the email settings to disable certain email notifications sent to you as the organization administrator of the organization, such as user profile updates, email address updates, or user registration notifications.

For more details on Email Settings, view the Email Subscription Management help.
CSV Upload

The CSV upload utility can be used to add multiple users to your organization at one time. It can also be used to subscribe exiting users to new applications. The utility functions via input from a CSV file you create based on the template provided in MAG.

Completing the template

The CSV file will need to have the following fields populated. Definitions of these fields are included in the table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Cardinality/Values</th>
<th>Response/Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Required</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>First Name</td>
<td>Required</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Optional</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>Suffix</td>
<td>Optional</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>Honorifics</td>
<td>Optional</td>
<td>Accepts only the following characters: Dr., Miss, Mr., Mrs., Ms, Prof., Sir, and (no characters entered).</td>
</tr>
<tr>
<td>Job Title</td>
<td>Optional</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>Email Address</td>
<td>Required RFC822 compliant</td>
<td>Must be unique</td>
</tr>
<tr>
<td>Phone</td>
<td>Required</td>
<td>Accepts only the following characters: Numbers, '(', '(', ')', '(', ')', 'e', 't', 'x' and embedded white spaces</td>
</tr>
<tr>
<td>Fax</td>
<td>Optional</td>
<td>Accepts only the following characters: Numbers, '(', '(', ')', '(', ')', 'e', 't', 'x' and embedded white spaces</td>
</tr>
<tr>
<td>Address 1</td>
<td>Required</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>Address 2</td>
<td>Optional</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>City</td>
<td>Required</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>Required</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>Field</td>
<td>Requirement</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>One-Time Password</td>
<td>Conditionally Required</td>
<td>Must be comprised of at least 4 distinct characters, at least 1 alpha character, at least 1 numeric character, and 1 special character; Does not permit leading and trailing whitespace or non-printable ASCII characters. This is the one-time password that will be used to complete first time login. Only required for users who do not have an R-IDP User ID.</td>
</tr>
<tr>
<td>State</td>
<td>Required</td>
<td>Accepts letters, numbers and special characters</td>
</tr>
<tr>
<td>Country</td>
<td>Required</td>
<td>Must be in the form of ISO 3166-1 Alpha-2 Code (i.e. United States = US)</td>
</tr>
<tr>
<td>Role</td>
<td>Required</td>
<td>Accepts only the following values: user, org_admin, app_admin, and bundle_admin</td>
</tr>
<tr>
<td>R-IDP User ID (New users only)</td>
<td>Optional</td>
<td>R-IDP User ID must be unique for the associated R-IDP Organization must be associated to an R-IDP Minimum 1 character required if value is entered.</td>
</tr>
</tbody>
</table>
Template
Use this file to build your dataset. Do not modify any formatting, field locations, or titles of fields. Once you have entered your data, the file must be saved as a .CSV for the upload functionality to work. Click here to download the template

Upload Procedure
1. To begin a user upload, navigate to the Administration tab of your MAG account, then click the User Upload subtab.

2. After building your CSV input file, click Browse for CSV File to select and upload your CSV file containing the user information. The uploaded file name will be reflected below the button:

3. Select the applications you wish to subscribe this user set to.
4. Click the Validate button to validate the file and the information contained within meets the requirements. Note: Clicking Validate will NOT submit your file for processing, but will analyze the data you have input and present any errors or warnings.

5. The User Upload screen will refresh and provide a status of each user.

Users denoted with a green checkmark have been entered correctly. Users displaying a red X have not been entered correctly. You can choose to Commit the users with the green checkmarks or click Back so that you may correct and upload a new CSV file. Follow the guidelines in the Error Handling section of this guide for assistance.
6. Click the **Commit** button to submit the file for final processing.

7. After processing, the system will present the **Acknowledgement** page, with the results of the file processing.

![Acknowledgement page](image)

### Error Handling

The upload utility has features built in to help resolve data formatting issues. Use the below table to help understand and resolve issues occurring during file validation.

<table>
<thead>
<tr>
<th>Error Condition</th>
<th>Validation Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required field is missing from the file</td>
<td>&lt;Column Name&gt; is required.</td>
</tr>
<tr>
<td>Data in field is too long</td>
<td>&lt;Column Name&gt; is too long.</td>
</tr>
<tr>
<td>Data in field is invalid.</td>
<td>&lt;Column Name&gt; is not valid.</td>
</tr>
<tr>
<td>#</td>
<td>Status</td>
</tr>
<tr>
<td>----</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>1.</td>
<td>Active</td>
</tr>
<tr>
<td>2.</td>
<td>Inactive</td>
</tr>
<tr>
<td>3.</td>
<td>Suspended</td>
</tr>
<tr>
<td>4.</td>
<td>Pending Acceptance of Terms &amp; Conditions</td>
</tr>
</tbody>
</table>

**User Application Subscription Status Information**

<table>
<thead>
<tr>
<th>#</th>
<th>Status</th>
<th>Status Description</th>
<th>Organization Administrator Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Active</td>
<td>The user’s subscription has been approved for access to the application.</td>
<td>None.</td>
</tr>
<tr>
<td>2.</td>
<td>Organization Registration Approval Pending</td>
<td>The organization’s request for subscription to the application has not yet been approved. No user can request access to the application.</td>
<td>None.</td>
</tr>
<tr>
<td>3.</td>
<td>Pending account creation by the Application</td>
<td>The application has not yet been provisioned by the Service Provider.</td>
<td>None.</td>
</tr>
<tr>
<td>4.</td>
<td>Pending Approval by the Application Owner</td>
<td>The user’s request is pending approval by the Service Provider Administrator.</td>
<td>None.</td>
</tr>
<tr>
<td>5.</td>
<td>Pending Application Administrator Approval</td>
<td>The application administrator has not approved the subscription request.</td>
<td>Contact the application administrator for the application. How do I find the application administrator? How do I complete this task?</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td>Pending Activation</td>
<td>The SCP Application Administrator has not yet activated the user’s SCP application subscription. Contact the application administrator for the SCP application. How do I find the application administrator? How do I complete this task?</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>Pending Acceptance of Terms &amp; Conditions</td>
<td>The Organization Administrator has not yet accepted the Terms &amp; Conditions for access to the application. Complete acceptance of Terms &amp; Conditions. How do I complete this task?</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>Inactive</td>
<td>The user is not subscribed to the application. None/subscribe user to the application. How do I complete this task?</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td>Suspended</td>
<td>The user is suspended from accessing the application. None/activate user’s access to the application. How do I complete this task?</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td>Pending Exostar Approval</td>
<td>Specific to FIS Medium Level of assurance request, user’s request is pending approval by the Exostar Portal Administrator. Contact Exostar Customer Support for information on delay in approval.</td>
<td></td>
</tr>
<tr>
<td>11.</td>
<td>Pending Proofing</td>
<td>Specific to FIS Medium Level of assurance request, user needs to complete in-person proofing process. Contact Exostar Customer Support for information on whether in-person proofing has been completed.</td>
<td></td>
</tr>
<tr>
<td>12.</td>
<td>Pending Application Administrator Approval</td>
<td>The user has an active FIS subscription, and is reapplying to get new certs. None. How do I find the application administrator? How do I complete this task?</td>
<td></td>
</tr>
</tbody>
</table>