Partner Information Manager
Supplier Guide
July 2018
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Overview
The purpose of this document is to provide information on the Supplier-side of the Partner Information Manager (PIM) application.

This guide outlines the following:
- Access information
- Dashboard overview
- Application navigation
- Form navigation

Exostar’s Partner Information Manager (PIM)
Exostar’s Partner Information Manager (PIM) is a risk management tool that leverages information from trusted sources to provide a Buying Partner with a Supplier’s current and potential risk and impact. PIM allows Suppliers to complete a form requested to them by a Buyer, and continue to share that form and form results with additional Buyers as requested. This *ask once and share* model reduces the burden of completing multiple questionnaires. Additionally, PIM provides contractors with a consistent set of minimum cybersecurity expectations for suppliers.

**NOTE:** Exostar Tier I Support is unable to assist in providing answers to any questions found on ANY of the questionnaires. If you are unsure how to answer a question relevant to your business, please work with your IT Department or the company you are doing business with, as they may better assist you.

Cybersecurity Questionnaire
The Cybersecurity Questionnaire was developed to measure a Supplier’s cybersecurity capability. The information a Supplier Partner provides helps them understand their organization’s cybersecurity posture. The questionnaire also helps Buying Partners manage risks with sharing sensitive information. Please visit the [Cybersecurity Questionnaire Support](#) page for additional information.

NIST SP 800-171 Questionnaire
The Department of Defense (DoD) now requires all its contractors to protect Covered Defense Information (CDI). The department modified its Defense Federal Acquisition Regulation Supplement (DFARS) to address the safeguarding of CDI. The DFARS clause 252.204-7012 requires *covered companies* to use the cyber safeguards described by the National Institute of Standards and Technology (NIST) in Special Publication (SP) 800-171, which NIST created specifically for commercial companies who do not operate *federal information systems*, but who receive or create CDI to perform defense contracts.

The information a Supplier Partner provides in the NIST SP 800-171 questionnaire is used by Buying Partners to determine a business’s security posture with respect to the required NIST
security controls. Please visit the NIST SP 800-171 Questionnaire Support page for additional information.

**Conflict Minerals Questionnaire**

As a Buyer, you can request Suppliers complete the Conflict Minerals Questionnaire. The Conflict Minerals Reporting Template is a free, standardized reporting template developed by the Conflict-Free Sourcing Initiative, which facilitates the transfer of information through the supply chain, regarding mineral country of origin and utilized smelters and refiners. The questionnaire is used to determine if suppliers are using smelters recognized by and meeting the CFSI standards.

**Exostar’s Identity and Access Management Platform (formerly known as MAG)**

Exostar’s Identity and Access Management Platform (formerly known as MAG) is a consolidated portal providing identity and access management as a cloud service for the Aerospace & Defense industries. The PIM application is available through Exostar’s IAM Platform. You are required to have an Exostar’s IAM Platform user account and an approved security credential to access PIM.

For more information on Exostar’s IAM Platform (formerly known as MAG), please visit [http://www.myexostar.com/Managed-Access-Gateway/](http://www.myexostar.com/Managed-Access-Gateway/).

**PIM Access**

A person assigned the PIM Application Administrator role from your organization receives an invitation to PIM and the required questionnaires submitted by a Buying Partner organization.

To successfully subscribe your organization to PIM, the Application Administrator must accept the invitation and the questionnaires. Once your organization is subscribed, and your Organization Administrator or PIM Application Administrator accepts the Terms and Conditions, you can access PIM.

To access PIM:

1. Log into your Exostar’s IAM Platform (MAG) account with an approved multi-factor credential. Approved credentials include:
   a. Phone-based OTP
   b. OTP Hardware Token with Proofing Upgrade
   c. Federated Identity Service (FIS) Medium Level of Assurance (MLOA) Hardware Certificates
   d. Government-Issued Common Access Card (CAC)
   e. Northrop Grumman OneBadge
   f. NASA PIV Card
   g. Enterprise Access Gateway solution.

**NOTE:** You must use Internet Explorer.
2. Once you log into your Exostar’s IAM Platform (MAG) account with your multi-factor credential, verify the credential strength in the upper right hand corner of your screen.

The below example shows the user logged in with an MLOA Hardware Certificate. If the credential strength says **Username and Password**, you are not logged in with a multi-factor credential.

3. On your **Home Dashboard**, locate the PIM application, and click **Open Application**.

**NOTE**: If you see a status other than **Open Application**, please use the **Legend** or reference the **PIM FAQs** for assistance. If you see a message saying **Login Requirements Not Met**, you did not login with the correct credential strength.

If you do not see PIM on your **Home** dashboard view, please contact [Exostar Customer Support](mailto:customer.support@exostar.com).

**PIM Roles**
If you are an Exostar IAM Platform (MAG) PIM Application Administrator, the system also designates you as an Application Administrator in the PIM application. Your role displays above your name on the Home dashboard.

The Application Administrator role within PIM allows you to manage users in the application. The Application Administrator can change a user’s role within PIM, deactivate a user’s PIM access, as well as create and edit Groups.

**Email Notifications**
The following notifications are sent to a PIM Application Administrators:

- When a buying organization requests form sharing.
- Reminder email 30 days prior to the expiration of a form you completed.
- Reminder emails to complete a form requested by a buyer partner.
- When a capability score of less than three is received on a submitted Cybersecurity Questionnaire.
The following notifications are sent to a **Supplier User**:

- When a form is assigned to you or completed by your PIM Application Administrator.

**Account Settings**

To access your **User Profile**:

1. On your **Home** dashboard in the upper right corner, select your name dropdown. Choose either **Contact Information** or **Account Settings**.
NOTE: Both options redirect to your **User Profile**, and you can navigate between the two tabs.

2. To update your **Contact Information**, click **Edit**.

![Contact Information](image)
3. Click **Update** once you complete your changes.
Under the **Settings** tab:

1. Modify necessary information:
   a. Update the **Date/Time Format**.

   ![Date/Time Format](image)

   b. Change your default view under the **Application** section.

   ![Application](image)

   c. Manage **Alert** settings.
   d. Manage **Email** settings.

2. Click **Save Changes**.

   ![Alert and Email Settings](image)
PIM Home Dashboard

The Home dashboard contains widgets that enable you to access information or perform functions in the application.

Vertical navigation includes the Home button. This navigation bar displays regardless of where you navigate within the application. Selecting Home redirects to your main dashboard.

Dashboard View

Buyer and Supplier organizations can both use PIM. Upon first-time login to the PIM application, the Supplier view defaults. This is the default view for subsequent logins.

To modify your view:

1. Click Modify in the top section of your screen.
2. Under the **Account Settings** tab, select **Buyer** from the **Default View** dropdown.

![Application](image)

**NOTE**: If you are not subscribed to PIM as a Buyer, no content is available in the Buyer view.

3. Click **Save Changes** to refresh your view.

**Alerts**

In the header section of your PIM dashboard, there is an alert icon. This icon represents the number of alerts for your review. Click the icon to display a dropdown of alerts. Select **View All** or **Dismiss All**.
Select **View All** to redirect to the **Alerts** page, containing alerts for the last 30 days. You can **Dismiss All** or **Dismiss** one alert at a time. There is also a legend explaining the different alert types.

To manage Alerts:

1. On your Home dashboard, select **Account Settings** via your name dropdown.
2. Navigate to the Settings tab, and Alerts section. Modify the alert selections as desired, by choosing Yes or No.

3. Click Save Changes.

**Forms Requests Widget**
This widget shows when a Buyer requests for you to share your form input and scores. An Application Administrator can accept or deny the request directly from this widget.

The Buyer Partner organization you do business with must submit an invitation to your company in order to see your questionnaire results. Once you either share or decline to share, the form no longer displays in the widget, and instead shows in the Forms Summary widget.

To accept a sharing request:
1. Click the Share button.

2. In the Confirm pop-up window, click Accept.
To deny a sharing request:
1. Click the Deny button.

2. In the Confirm pop-up window, provide a denial reason. Click Deny.

**NOTE**: Please see the [Forms Sharing Requests](#) section below for more information.

**Forms Summary Widget**
This widget provides a list of accepted form sharing requests, status, percentage complete, and a Shared with column. There is also a Source Org column, which provides information on the
source of a form if it belongs to a form hierarchy. Click the Source Org icon to display more information.

![Hierachy](image)

As an Application Administrator, you have the option to assign the form via this widget. If you are assigned to a form, the **Edit** icon is available, which redirects to the **Form Details** page.

![Forms Summary](image)

To assign a questionnaire:

1. Click the Assign icon.
2. In the pop-up window, select a user from the dropdown menu, and click Add.
3. Once you add the desired users, click the Close button.

**NOTE:** You can add up to four users per form. Please see the Assign Questionnaire section below for more information on user assignments.

To determine who your organization is sharing forms with:

1. View the **Shared with** column and click the number of partners next to the form.
2. In the **Shared with** pop-up window, review the **Partners** and **Shared Date**.

3. View the status of the questionnaire via the **Status** column. If the request says **Pending**, you have not accepted or denied the request yet. If you do not accept the sharing request, the Buyer Partner cannot see the responses to your questionnaire.

**Recent Activities Widget**

This widget provides a 30-day timeline of all activities with a Buying Partner. Activities include:
- Status of your organization’s response to an invitation
- Status of your organization’s response to a questionnaire
- Status of acceptance or opting out of a questionnaire

This widget is always collapsed. Select the **Expand** button to see the five most recent activities or select **View All** to view all activities in the last 30 days.

**My Organization Widget**

This widget provides a snapshot of your organization’s details.
To manage this widget:

1. Click your hyperlinked organization name to access your Organization Profile page.

   ![Organization Profile Page](image)

2. Click the Suppliers section to access the Partners tab, which provides information about the Partners you are connected to. Please see the Partners Tab section for more information.

   ![Partners Tab](image)

   **NOTE:** Click the hyperlinked Organization Name to redirect to that Supplier Partner’s profile.

3. Click the Users section to view information on users within your organization. Please see the Users Tab section for more information.

   ![Users Tab](image)

**My Organization Profile Page**

The Organization Profile page provides the following tabs for you to manage your connections, users, groups, and to view forms shared with your company:

- Partners
- Users
- Forms
Partners Tab
The Partners tab provides a list of all Partners associated with your organization and the date you connected with them.

The Partner Profile provides additional information about the individual Buyer Partner organization, including the Buyer Partner’s organization address, shared forms, as well as your organization’s score for forms shared with the specific Buyer. The profile also provides a map, indicating where the Buyer Partner is located.

To access and navigate a Partner Profile:
1. Click a Buyer Partner hyperlinked Organization Name anywhere in the application.
2. Click the Back to Partners link to redirect to the Partners tab of your My Organization Profile page.
3. Select the dropdown arrow via the Forms shared with section to display forms shared with the particular Buyer.
4. Click the hyperlinked form name to redirect to the Form Details page.

**NOTE**: Scores are calculated only after a questionnaire is completed and submitted. You can find additional information on completing or updating a questionnaire in the Completing and Updating a Questionnaire section.

**Users Tab**

If you are designated as an Application Administrator within the PIM application, you are able to manage users within the application. The Application Administrator can change a user’s role and deactivate a user’s access.

To edit a user:

1. Click **Users** via the **My Organization** widget to redirect to the **Users** tab on your **My Organization Profile** page.
2. Click the **Tools** icon next to the user you want to manage.
3. From the User Management window, modify a user’s role, including your own, if necessary.
4. Click Update to save your changes or Close to disregard.

NOTE: If you change a user’s role to Standard User, they lose administrative privileges within PIM. If you deselect the Active checkbox, the user no longer has access to PIM after they log into their Exostar’s IAM (MAG) Platform account.

To view and manage the individual user profile:
1. Select any of the user’s hyperlinked information.

2. Click the Edit button.
3. Manage necessary information. Click **Update**.

![User Profile](image)

**Forms Tab**

A form is a questionnaire a Buyer invites a Supplier to complete. The available Questionnaires in PIM are:

- Conflict Mineral Questionnaire
- Cybersecurity Questionnaire
- NIST SP 800-171

The Forms tab provides a list of all forms within your organization, along with the Partner who requested the form, when the form was last updated, the sharing status of the form, and the expiration date.

To access the Forms tab:

1. Click your hyperlinked organization name in the **My Organization** widget.
2. Navigate to the **Forms** tab on your **My Organization Profile** page.

**Forms Details Page**

The Form Details page provides information on how your organization responded to a questionnaire and how your organization scored, as well as Pending forms waiting on completion.
To navigate the Form Details page:

1. Click a hyperlinked Form Name.

2. On the Form Details page, click the Edit, View Form Input, or Click to Edit buttons to obtain additional information on how your organization answered a specific question.

3. Select the Reports dropdown to download a Blank Form or to obtain a report on how your organization responded by selecting Feedback Report. You can also export to an Excel file.
NOTE: If you have not yet submitted your form, the option to download a Draft form displays. Select to download a CSV or PDF file.

4. Click the Assign User button to assign a user to this particular form.

NOTE: See the Assign Questionnaire section for more information on form assignment.

Form Sharing Requests
Your PIM Application Administrator can accept and deny form sharing requests via the Forms tab.

Deny
To deny a form sharing request:
   1. Click the Decline button next to the desired form.

   2. In the Confirm pop-up window, enter a denial reason. Click Deny.
Accept

To accept a form sharing request:

1. Click the **Share** button next to the form name in the **Form Requests** widget.

   ![Forms Requests](image)

2. In the **Confirm** pop-up window, click **Accept**.

   ![Confirm pop-up](image)

Opt-Out

If your organization shared a form with a Buyer Partner, PIM Application Administrators have the ability to opt-out of completing the form. If you do not have the role of PIM Application Administrator, you cannot submit an opt-out request.

Opting-out discontinues form sharing with the Buyer Partner’s organization. The Buyer Partner organization will no longer have access to that particular form, and you cannot click the form to open. **If you are doing business with Lockheed Martin, the opt-out option is unavailable. If you are doing business with Northrup Grumman, the buyer needs to approve your opt-out request.**

To opt-out:

1. The PIM Application Administrator must submit an online request to Exostar.
2. Upon request submission, the system sends an auto-generated email with an embedded link, to the email address you provide. The PIM Application Administrator must review and confirm the opt-out request by clicking the embedded URL, which takes them to a page displaying their request information.
3. The PIM Application Administrator is required to confirm the request in order for Exostar to review your case.

Once Exostar processes the request, the PIM Application Administrator receives a completion notification via the email. No action is required from the supplying organization at this time. It
can take up to five business days for Exostar to complete the request, and for the PIM Application Administrator to receive the email notification.

**NOTE:** If your organization wants to share an opted-out form with the same buyer, the buying organization is required to submit another Form Sharing request to your organization, and your organization is required to accept the sharing.

**Assign Questionnaire**

Only PIM Application Administrators can assign questionnaires to a user, allowing the user to complete or edit the form. PIM Application Administrators can assign a maximum of four users per questionnaire, and when a questionnaire is assigned to a user, the user receives a notification email and alert.

If you complete the invitation for PIM access from your Buyer Partner, you are required to assign the questionnaire to yourself if you need to complete or edit the form. You can only assign a questionnaire if a Buyer Partner requested your organization share the form.

To assign a questionnaire (form):

1. Click the hyperlinked Form Name.
2. On the Form Details page, click the Assign User button.
3. In the pop-up window, select a user from the Users dropdown. Click Add.
To further manage user assignments:

1. Remove a user from a questionnaire by clicking the **Remove** link.
2. Unlock a user from a questionnaire by clicking the **Lock** icon.

![Cybersecurity Questionnaire](image)

**Form Completion**

This section explains functions available throughout all PIM forms. Please note, you cannot delete an uploaded form, however, you can replace an existing form by uploading a new version.
To navigate and complete a Questionnaire:

1. Click the hyperlinked form name anywhere in the PIM application.

2. Click the **Start** button to begin.
3. Section one, **Welcome** displays. Click **Next** to proceed.

![Section one, Welcome displays. Click Next to proceed.]

**NOTE:** The above screen looks different depending on the form you are completing. The **Guidance** section displays regardless of your location in the form, and provides additional information and resources on that particular part of the form.

4. To navigate between pages, use the **Previous** and **Next** buttons.

![To navigate between pages, use the Previous and Next buttons.]

5. At any point during form progress, utilize the **Save Draft & Exit** button if you wish to save your responses and return at a later time. You are redirected to the dashboard and when you resume form completion, you are taken back to the last page you were on.
6. Once you answer all form questions, the Submission page displays. Enter the submitter’s details and click Submit Response.

**NOTE:** The Progress percentage bar, located at the top of the form, displays through the entire form completion process.

7. A prompt displays asking if you want to proceed with submission, select **OK** to proceed or **Cancel**.

![Message from webpage](image)

**NOTES:**
- You cannot submit a form if you do not enter the submitter’s details.
- Any unsaved changes do not save and the system discards the form.
- If you need to cancel the file you selected, close or cancel from your drive.
- If multiple users need to work on the form, click **Save Draft & Exit** before submitting.

In order for the company you are doing business with to see your questionnaire results, a user with the PIM Application Administrator role needs to accept a sharing request.

Once you send a response, you are taken back to the questionnaire, where you can edit the completed questionnaire, and resubmit for updated scoring.
Scoring
Each questionnaire is scored differently, and this section describes how to manage your scores. The Score Summary section is located on the right side of the Cybersecurity and NIST Form Details page, once you complete a form.

Cybersecurity Scoring
The Cybersecurity Questionnaire capability score is calculated based on the responses provided to each control family. A Partner Supplier is required to implement all control activities contained within a capability level to attain that capability level. Before a Partner Supplier can meet the next capability level, they are required to have implemented all control activities from the prior control family.

The Score Summary section allows you to review a summary of your capability results and control score. The overall score is a collection of all capability level scores.
Click the information icon in the **Score Summary** field provides a legend to analyze your results.

<table>
<thead>
<tr>
<th>Capability Level</th>
<th>Score Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 5</td>
<td>5.00</td>
<td>Cyber risk management program that can detect, protect against, and respond to advanced threats; Specific advanced controls are implemented and optimized on an ongoing basis.</td>
</tr>
<tr>
<td>Level 4</td>
<td>4.00-4.99</td>
<td>Cyber risk management program that can detect, protect against, and respond to advanced threats; Specific advanced controls are implemented.</td>
</tr>
<tr>
<td>Level 3</td>
<td>3.00-3.99</td>
<td>Solid performing cyber risk management program; strong protections have been implemented; Advanced threats are understood and taking steps to address with specific controls. Additional risk mitigations are likely needed to protect against advanced attacks.</td>
</tr>
<tr>
<td>Level 2</td>
<td>2.00-2.99</td>
<td>Moderate level cyber risk management program; good protections in place but additional risk mitigations are required to protect sensitive information.</td>
</tr>
<tr>
<td>Level 1</td>
<td>1.00-1.99</td>
<td>Basic level cyber risk management program; some protections in place but additional risk mitigations must be implemented. Red No or minimal cyber risk management programs; significant cyber protections are lacking.</td>
</tr>
<tr>
<td>Level 0</td>
<td>0.00-0.99</td>
<td></td>
</tr>
</tbody>
</table>

**Capability Levels**

Capability levels show the number of questions asked, and the number of questions answered. In the illustration below, Capability Level 1 shows 28 questions were asked and 28 questions were answered.
NIST 800-171 Scoring

When viewing scores for the NIST 800 questionnaire, two score bars display in the Score Summary section. The first score provides the total **Implemented** and **Approved** controls over the total number of available controls.

The second score bar indicates the total number of **Controls** you selected Implemented, Approved, and SSP/ POAM for over the total number of available controls. Each bar remains red until it reaches a level of 100%.

![Score Summary](image)

**Control Score Assessment**

You can view further analysis by control family in the **Control Score** section of a questionnaire. You can see the control score for each individual control family. This is calculated by the
number of capabilities selected in each control over the total number of capabilities available per control.

Support
You can find additional information including FAQs, Cybersecurity and NIST SP 800-171 Questionnaire resources and more at [http://www.myexostar.com/pim/](http://www.myexostar.com/pim/).