



# Trading Partner Manager (TPM) LM Buyer Help Document

Version 3.0

Prepared by Exostar LLC.

July 1, 2020



### Contents

1.1 TPN	M Buyer Roles	3
1.2 Ma	naged Access Gateway (MAG) Roles	3
1.3 TPM	٨ Profiles	4
4.1	Enter Core & Profile Information	9
4.2	Dun and Bradstreet Search Results Page	10
4.3	Resolve Duplicates Page	11
4.4	Enter Organization Information during Request New Org	12
4.5	Request/Invite Organization	12
4.5.1	Profile Type: Full (Regular)	13
4.5.2	Profile Type: Full (Expedited)	14
4.5.3	Profile Type: RFx or QA(with users)	17
4.5.4	Profile Type: Profile with no users	17
4.6	Contacts	18
4.7	Address Validation	20
5.1	My Open Requests	23
5.2	All Open Requests	26
View	/ Request	26
Dele	te Request	26
5.3	Approval-Pending Requests	26
6.1	Profile Update	27
6.2	Upgrade Profile Type/Flag	27
6.3	FULL Profile	29
6.4	RFx or QA w/Users Profile	30
6.5	NonPO/PCard/QA without Users Profile	30
6.6	Sample Add Profile Use Cases	30
7.1	Organization Debarment & Other D&BAlerts/Critical Events	35
7.2	Organization Mergers & Acquisitions per Dun & Bradstreet Load/Refresh	35
7.3	Denied Parties List	35
8.1	Profile Registration Report	36
8.2	Profile Expiration Report	38



### **1** USER ROLES AND TPM PROFILES

The Trading Partner Manager (TPM), formerly CIC, supports a number of roles, each with varying levels of permissions and privileges. These roles include:

#### **1.1 TPM Buyer Roles**

**Inquiry Only** – This role allows the user to searchandview alloon-sensitive data for an organization.

**Requester/Buyer** – This role includes the inquiry-only privileges plus the ability to request New Organizations/Trading Partner profiles, as well as modify certain organization data.

**Site Administrator** – This role allows the user to request New Organizations, searchandview allsensitive and nonsensitive organizationdata as well as update certainorganizationdata.

**Corporate Administrator** – In addition to the Site Administrator' privileges, the Corporate Administrators can view all open requests.

Accounting Administrator – This role allows the user to request New Organizations, searchand viewall sensitive and non-sensitive organization data as well as update certain organization data specific to banking, payment & tax information.

**Buyer Approver** – This role is responsible for validating and approving/denying requests to expedite creation of an organization record.

#### 1.2 Managed AccessGateway (MAG) Roles

The following roles are supported by Exostar and other designated thirdparties:

**Exostar Portal Administrator (EPA)** - This role is held by Exostar Membership Services team. The EPA authorizes & approves organization and user registrations. They can request New Organization administrators and perform One-Time-Password (OTP) resets as well as permanent password resets. They canalso modify organizationinformation.

**Exostar Customer Support** - Exostar Customer Support person who canview organization and user profile information as well as initiate password resets for users' permanent password.

**Service Provider Administrator** (SP Administrator) – The SP Administrator is responsible for final approving the person employed by a SIG applicationowner (Service Provider), that is responsible for coming into SIG and updating organizations' application subscription status.

The following roles are defined at the time of creating the MAG account for a supplier.



**Organization Administrator** – Organization Administrator (Org Admin) is the primary contact for the organization's MAG account. The Org Adminis responsible for the overall administration of the organization's MAG Account. This individual has the following privileges:

- Approves a user to be added to MAG as an employee of their organization.
- Able to search and viewall sensitive and non-sensitive organization data.
- Update certain organizationdata for their organizationonly.
- Request subscription to additional MAG applications for the organization.
- Overall administration of the organization's MAG account and users.

After the initial account set-up, this role can be granted to multiple individuals by the existing Organization Administrator.

**Company Contact** - The individual identified as the Company Contact is the secondary contact for the organization.

**Application Administrator** – An application Administrator is designated for eachapplication that anorganization subscribes. The applicationadministrator (appadmin) is responsible for managing the access to the application within their organization by approving/denying a user's applicationsubscription. In approving the user's request, the applicationadministrator (on behalf of their organization) assumes financial responsibility for the user's seatin that application.

User – A person withan active MAG account, whose employing organizationis registered with MAG.

#### **1.3 TPM Profiles**

The following profile types are available to LM Buyers when inviting a supplier to complete the Invitation process.

Profile Type	Variation	Business Definition
Full	Regular	Complete, PO profile vendor (canbe used for all activities). Allows an organizationto do business with LM in all capacities. Highest level of profiles possible.
	Expedited	Full profile, PO vendor that needs to be used in an emergency situation and as such is created by a slightly different process. Provisioned within 30 minutes.
RFx	-	Vendor that can be used for various RFx (i.e. RFQ, RFP, etc) activities.
QA	With users	These are quality onlyandinspection suppliers. They are OEM suppliers that are used on PO's written to other third party distributors/vendors. These suppliers are able to login to LMP2P via Exostar MAG.
	Without users	Same as above however these suppliers are notable to login to the Exostar MAG.
Non-PO	-	These are vendors for which there may be no PO activity, but to which payment still needs to be made (i.e. a special event payment).



PCard	-	Vendor with whom PCard purchases aremade. These accounttypes are created manually by LM users.
Unsolicited	-	This is a pseudo profiletype. It is a supplier that already has an existing account within Exostar and most likely are doing business with another Exostar partner (e.g. Boeing, Raytheon, BAE, etc). Their information is searchable in TPM.

### **2** NAVIGATION

Use the **Previous**, **Next** and **Cancel** buttons/links on each page to navigate between pages on the Organization profile. Clicking the **Previous** or **Next** buttons saves entries on the current page before navigating away.

Clicking **Cancel** at the bottom of the **Org Summary** pages discards any entries that have been made so far on the current page and returns the user to the main **Org Summary** page. No validation is performed.

The **Cancel Request**, **Save**, **Resume Later**, **Submit Request** and **Sendto LM Buyer** buttons are located on the left global navigation pane so that the user is able to access them at any point in the request.

The **Submit Request** and **Send to LMBuyer Mgr** buttons become active when all required fields have been provided in all sections.

Clicking **Cancel Request** in the globalnavigation performs form validation and then prompts the user to confirm that they really want to cancel.

- If Yes, the request is cancelled and the user is returned to the TPM Home page.
- If No, the user is returned to the page that they were on.

Clicking on another section of the Organization profile will save any information entered on the page and performs validation on the current page before displaying the next page. If there are any validation errors, the user will be required to fix these issues before advancing to the next page.

Clicking **Save and Resume Later** will take the user back to the page they were on before coming into the Organization Information page (This may notalways be the TPM Home page). They can then access there quest from their **My Open Requests** inbox.

**IMPORTANT:** Screenshots in this guide may not accurately reflect the most recent requirements and are shown only to provide the user with a visual image of what the screen will look like. Wherever possible, updated screenshots will be inserted.



### **3 PERFORM ORGANIZATION SEARCH**

To search for an organization that is registered in the TPM, enter a keyword (or part of a keyword) beside one or more of the search filter options and click **Search** to execute the search, **Clear** to clear all entries and re-enter, **Close** to cancel the search and close the screen. See notes on next page for information on search criteria.

XOSTA				About Us Help
Ornanization Search	Renuest New Organization	Mix Onan Damisaste	Reports	User : Requestert M Lincolest (imreque
tor one or more search ri	toria and click on 'Search' Use	my open requests	toporte	
Openational of the later of the	tena ana circe on Search. Ose	nore than the search their	an to narrow down your results.	
Organization information				
Organization Name:		Contains	•	
Exostar ID:		DUNS N	umber.	
S Federal Tax ID Number:		NAIGS	Code:	
NAICS Code Description:		NAICS Compar	V Size: Please Select •	
¥ Advanced Search				
Address 1:			Addre	\$2
City:			State/Pro	nce.
Country	Discus Calud	(Ente	er ISO two character values, e.g., NY for New Zio/Postal /	ork
SIC Code:	Please Select	•	2.ppPostal C	na
Organization Profile Type:	Full		SDB	VDP: Acian Parific American
	RFx QA Non-PO P-Card ~			Black Anneican Contilled Navie Anneican Hispanic Anneican Subcontinet-faian Anneican Nates Anneican Other
Socioeconomic Type:	BLIND OR SEVERELY HAND EDUCATIONAL INSTITUTE F EDUCATIONAL INSTITUTE F HIST. BLACK COLLEGE OR MINORITY INSTITUTION NON-PROFIT FEDERAL AGE OTHER, STATE, OR LOCAL A TRIBAL COLLEGE OR UNIVE N/A	ICAPPED + RIVATE UBLIC INIV NIV GENCY RSITY	Status (	Meter     - K-Buyet In Process       D-BackVated     - K-Byeled       X-Expleid     - K-Byeled       V-Backvated     - K-Byeled       V-Backvated     - K-Byeled       M-Pending EX-Deproval     - K-Byeled       S-Suspended
	Small Disadvantaged Busines	SD SD	B certified by SBA in CCR's DSBS Database:	
	SUD TIDE Federally Recognize		Veteran Owned	
	Service Disabled Vetera	1.	Unsolicited:	
	HUB Zon		Government Entity:	
	D&B HUB Zon	e: 🗐	Expedited	9
Intra-Lockheed Martin	Work Transfer Agreement (IWTA	): 🖻	Accepts Credit Card	
	Non-eCommerc Small Busines	a: Are National Institute s:	for Blind/Severely Handicapped (NIB/NISH):	
Search Results				
Exclude Existing LMP2P	Vendors: 🛄			
Select the columns that y	ou would like on the search resu	Its page. Organization Nam	e, Address and Status columns will always be	resent
UC Fudera	Exostar ID: M Organiza	tion Profile Type:		
US Federa	CDD IN	UDINS NUMBER M		

Search Clear Close

Screenshot 1: Organization Search Page



#### NOTES:

- The search logic for most of the fields is a 'CONTAINS'. For example, if you enter 'pol' in the **Organization Name** field, the system will return all organization records that contain the string 'pol' in the organization name.
- The search logic on the NAICS Code field is a 'STARTS-WITH'. As an example, a search for a NAICS code that starts with '123' would yield the results '123456', '123976', '123228', etc.
- When multiple entries are made, the system implements an 'AND' logic, i.e. if you enter 'pol' in the **Organization Name** field, and 'Virginia' in the **State** field, the system returns all organization records that contain the string'pol' in the organizationname AND are located in Virginia.
- The **Search Results** page can be customized to displaycertain fields by selecting from the available options however organization name and address will be returned by default upon every search.

Upon performing a search, the system will return all organizations that are registered in the TPM as well as all pending organization registration requests. Pending requests are anythat have been submitted, but have not yet been approved by the EPA.

#### \*Subject to the TPM Buyer role.

EXOSTAR								About Us	Help Logout
Organization Search Request New Organization My Opu Organization Search Results	m Requests Re	ports						User : Requester1 M L	ncotest (Imrequester1)
Organization •	Exostar ID •	Organization Profile Type •	DUNS Number •	Unsolicited •	Status •	US Federal Tax ID Number •	SDB •	2FA Compliant +	ults Per Page 25  Actions
3 H TECHNOLOGY INSTITUTE LLC 7 CLIFFSWALLOW DR STE 201 MEDFORD, NJ 080553805, United States	84468	QA_ONLY,FULL,RFX,NON_PO	044021884	No	Active	030465685	No	Yes	View/Edit View in LMP2P
3.9 Post Test/Exostar QA 13530 Dulles Tech Drive Herndon, VA 20171, United States	118499842			Yes	Not Subscribed (new)		No		View
4.4.2 EXO-QA/Trafalgar 13241 Woodland Park Dr Herndon, VA 20171, United States	114410769			Yes	Not Subscribed (new)		No		View
6th Time Company - UAT OAP MAG/ExostarQA/ExostarQA-RB 2325 Dulles Corner Herndon, VA 20171, United States	119608984			Yes	Not Subscribed (new)		No		View
A. E. PETSCHE COMPANY, INC. 1501 NOLAN RYAN EXPY ARLINGTON, TX 760114951, United States	1488	QA_ONLY,FULL,P_CARD,RFX,NON_PO	064213085	No	Active	751238083	No	Yes	<u>View/Edit</u> <u>View in LMP2P</u>
AMJ ENGINEERED SOLUTIONS, LLC 3810 DRANE FIELD RD STE 7 LAKELAND, FL 338111213, United States	1504	QA_ONLY,FULL.P_CARD.RFX.NON_PO	089654040	No	Expired	591797975	No	No	View/Edit View in LMP2P
AB WAX ExostarDemo Test Supplier/AB UAT Test 2325 Dulles Corner Boulevard ste 600 Herndon, VA 20171, United States	119074900			Yes	Not Subscribed (new)		No		View
AB WAX TEST ExostarDemo/AB WAX ExostarDemo Test 2325 Dullas Corner Boulevard ste 600 Herndon, VA 20171, United States	117668830			Yes	Not Subscribed (new)		No		View

Screenshot 2: Organization Search Results Page

- With proper permissions, organization details may be viewed and/or edited by clicking the **View/Edit** link.
- The system displays a View link for each organization record that is not subscribed to LMP2P.
- Clickon View/Edit link to display the organization information. (see screenshot below)
- Organizations already subscribed to LMP2P may be edited in TPM or viewed directly in LMP2P by selecting the **View in LMP2P** link.



Organization Summary	Clicking on	the Previo	us and Next buttons shall	save page content	t and perform validation on	the current page be
V Business Description	displaying	the next pa	ge.			
V Company Profile						Next
✓ Alerts						
Socio oconomic	Organizatio	on Name:	WALTHAM AIRCRAFT CLOCK	Status:	Expired	
Solf certification	Address 1:		2364 SOUTH U.S. HIGHWAY	Address 2:		
	City:		OZARK	State/Province:	AL	
	ZIP/Postal	Code:	36360	Country:	UNITED STATES	1
D&B Other Information	Main Busin	ess Phone:	334-774-3584	DUNS Number:	874325228	
Foreign (Non-U.S.) / Demostia (U.S.) Owned	Exostar ID:		109535857	Organization ID:	EX0109535857	
Domestic (U.S.) Owned	Exostar MP	ID:	d6b2084a-1e13-40fb-a578-			
V Payments/Remittance			678000e10400			
Contacts	Profile Ty	pe	Status			
V MAG Information	QA	On				
💞 ТРА	RFx	On				
	Non-PO	On				
Actions	Full	Un				
Modify P2P profile/flag	Intra-Lockhe	ed Martin Work 1	ransfer Agreement (IWTA): Go	vernment Entity:		
Close	Non-eComm	erce:	Fx	nedited:		
	OA With Lies	pre'				
			V			
	Organizat	ion Commer	nts			
	CHG OF AE	M TO SANDI AN	TONIAK FROM ANICE CAMP - NO L	ONGER NEEDS ACCESS.		
	Fnca M Lno	a, 8/6/2009:				

Screenshot 3: Organization Summary Page in TPM

To update:

- Clickon anyheader on the Search Results page to sort the results by that field.
- The default return will be 25 results per page. To change, simply select from the options in the drop down list box.
- If the list of returned organizations exceeds 1 (one) page, use the arrow buttons to navigate back and forth.
- If the search yields more than 500 results, the system willprompt you to use additional filter options to narrow down your search.
- From the Search Results page, use the Revise Search button to return to the Organization Search page.



### **4 REQUEST NEW ORGANIZATION**

There are 2 (two) ways to initiate a request to a new organization to join LMP2P:

From the TPM Main Page, click the Request New Organization tab;

• From the TPM Main Page, perform **Organization Search** -> From the **Search Results** page, click the **View** link for the desired organization-> From the **Organization Summary** page, click **RequestNew Organization** button.

#### 4.1 Enter Core & Profile Information

The first step in creating a request is to enter some basic organization details and select the desired organization profile type(s) and flags.

EXOSTAR	About Us Heip L	igout
	User : Requester1 M Lmcotest (imrequest	er1)
Request Organization - Basic Information		
Enter Basic Information and select the Profile Type(s) for the organ • Depending on the Profile Type(s), you can search in D&B fi • To search in D&B, you must enter DUNS Number OR Organization Nam • To skip the D&B Search, you must enter Organization Nam	ation you are trying to request. his organization or skip D&B search and continue to request a new organization. ation have, State and Country Address 1, City, State, ZIP, and Country	
Organization Name:	DUNS Number: (Enter numbers only, no dashes or spaces)	
Address 1: (Need physical address no PO Box)	Address 2:	
City:	StateProvince:	
Zin/Postal Code:	Lenter ISU two character values, e.g., NT or New York	
Active Profiles Profile Type		
Profile	Flag	
	Expedited (Select only if an emergency purchase order is needed)	
Full (Select if purchase orders will be placed)	Intra-Lockheed Martin Work Transfer Agreement (INTA)	
RFx RFx	QA With Users	
a qa	Government Entity	
Non-PO	Non-eCommerce	
P-Card	PIM Required	
	Do Not DUNS (Select this option to skip the D&B Search)	
Cancel Request Skip D&B Search D&B		

Screenshot 4: Request New Organization – Basic Information

**IMPORTANT:** The following rules governthe selection of flags:

- Upon page load all the flag checkboxes are disabled.
- Only the Corporate Admin will be able to marka profile/organization as **Do Not DUNS** or **Non-eCommerce**.
- The system will require that at least 1 (one) profile must be selected on a request.
- If the Full profile is selected, the Expedited, IWTA, Non-eCommerce and Government Entity flags will be automatically enabled;
- If the **Full** profile is selected, the system will automatically check all of the other organization profile types EXCEPT **P-Card**. The system will also automatically select the **QA with users** and **PIMRequired** flags, making them read-only.
- If the RFx profile is selected none of the flags will be enabled
- If the QA profile is selected, the QA with users flag will be enabled
- If the NonPO profile is selected, no additional flags will be enabled
- If the **PCard** profile is selected, no additional flags will be enabled.



- If the Non-eCommerce flag is checked, the system will display and require the Non-eCommerce Reason. If the IWTA, Government Entity or Non-eCommerce flag is checked, the user will not be able to select the Expedited flag, and vice versa.
- An organization can onlybe flagged as one of these at a time: **IWTA**, **Government Entity** or **Non-eCommerce**. Only the Corporate Admin or the Site Adminwill be able to mark a profile/organization as **Government Entity** or **IWTA**.

<u>NOTE:</u> Selecting the **Do Not DUNS** option means that the organization will not be synchronously or asynchronously updated from D&B, neither will it be included in the monthly D&B batch update.

Upon selecting the appropriate profile type and flags, you can opt to do a **D&B Search** or **Skip D&B** in order to advance to the next step, depending on the combination of profile type(s) and flags that has been selected.

To use the **Search D&B** option, the user will be required to enter either the **DUNSNumber** OR the **Organization Name, State** AND **Country**. The **Search D&B** button will be enabled only if this information is entered AND the **Do Not DUNS** flag is not checked.

The **Skip D&B** option is available to all organizations that are not **Full** Profile except those **Full** Profile organizations that are flagged as **Do Not Duns**.

**NOTE:** Synchronous D&B Search (and load) is mandatory for full, un-expedited profiles. **Skip D&B** option is allowed in all other cases (if core data is present). Setting the **Do Not DUNS** disables the **Search D&B** option making **Skip D&B** the only possible action.

- If the **Search D&B** button is selected, then the system will perform a free search for this organization in the D&B registry and display the **Dun and Bradstreet Search Results** page.
- If the Skip D&B option was selected, the system will display the Organization Summary page.

However, if any possible duplicates are found for the organization, the system willdisplay the **Resolve Duplicates** page before going directly to the **Organization Summary** page.

Clicking **Cancel Request** from the **Basic Information** page willreturn the user to the TPM main page.

#### 4.2 Dun and Bradstreet Search Results Page

The **Dun and Bradstreet Search Results** page displays all possible matching organizations found in the Dun and Bradstreet registry, up to a maximum of 20 records.



				User : Requester1 M	Lincotest (limit	equester
Dun and Bradstreet Search Results - Maximum	number of matches are limited to 20					
found existing Organizations in D&B that matched	your search. You may load one of the matches or cor	tinue to create a new vendo-	r organization.			
ganization Name:	DUNS Number;	801318168				
Address 1	City:					
Address 2	State/Province: (Enter ISO two character values, e.g. NY)	for New York)				
Zip/Postal Code:	Country	Please Select	•			
ack Cancel Request Revise Search						
Organization	Trading Style Name/DBA	DUNS Number	Notes		Actions	
/FTWARE INC 25 DULLES CORNER BLVD STE 700 ERNDON, VA 201714647, United States		801318168	To create a new profile for this organization, click on the 'Select Organization' link.	Select On	ganization	

Screenshot 5: Dun and Bradstreet Search Results

- To ignore the **Duns and Bradstreet** search, click the **Back** button to go back to the previous page (the **Basic Information** page) and click on the **Skip D&B** button (if active) to be taken directly to the **Organization Summary** page.
- If any possible duplicates are found for the organization, the system will display the **Resolve Duplicates** page.
- If no matching address is found, the system will display anerror message.

Request Organization - Basic Information	
<ul> <li>Enter Basic Information and select the Profile Type(s) for the organization</li> <li>Depending on the Profile Type(s), you can search in D&amp;B for this o</li> <li>To search in D&amp;B, you must enter DUNS Number OR Organization</li> <li>To skip the D&amp;B Search, you must enter Organization Name, Addre</li> <li>The address you provided for Organization could not be validated but</li> </ul>	you are trying to request. rganization or skip D&B search and continue to request a new organization. Name, State and Country ass 1, City, State, ZIP, and Country will be accepted as entered.
Screenshot 6: Organization	on Match Error Result page

- To perform search again, modify searchcriteria at the top of the page and click the **Revise Search** option.
- If no matches are found, e.g. if DUNS Number provided in the **BasicInformation** page is invalid, a **no match found** message will be returned.
- To cancel the request, select the **Cancel Request** button to return to the TPM main page. You will then be prompted to confirm the rejection or removal of the request.

**Note:** Organizations that are already in TPM or for which there is a pending request will not be available for selection.

#### 4.3 **Resolve Duplicates Page**

Before advancing from the core information page, the system willautomaticallysearchthe TPM to see if the organizationalready exists. If the system finds any, it will display <u>the first 20</u> organizations that meet the threshold on the **Resolve Duplicates** page.



EXOSTAR				About Us Help Logo
				User : Requester1 M Lmcotest (Imrequester1)
Resolve Duplicates - Maximum number of matches are limited to 20				
We found one or more organizations in the Trading Partner Manager that matched the basic information you entered.     Select one of the matches or you can ignore the matches and continue to request a new organization.				
Organization +	DUNS Number •	Score -	Exostar Id 🔹	Actions
Jetty Non-PO July 2018 2325 Dufes Comer Blvd Herndon, X-2017-1674, United States		62	114019185	View Details View in LMP2P
UAT OS Patching August2018/Jetty 2325 Dulles Comer Biol Herndon, VA2017, United States		62	117590161	View Details
UATOppinication, 13tH-agust 2325 Dulles Comrei Boulevard Hendon, V-2017, United States		62	117371542	View Details
Jetty MAG-SOTP OS Patching/UAT September 2016 2325 Duties Corner Biol Herndon, VA2017, United States		62	112600100	View Details
AMG Organization 2325 Duiles Comer Boulevard Hemolon, W20171, United States		62	113604556	View Details

Screenshot 7: Resolve Duplicates Page

- If no match is found in the TPM, the user will be taken directly to the **Organization Summary** page.
- The percentage match has a lower bound of 80%.

With proper permissions, organization details may be viewed by clicking the **View Details** link. Organizations already subscribed to LMP2P maybe viewed directly in LMP2P by selecting the **View in LMP2P** link.

Click **Cancel** to cancel the process at this point or **Ignore Duplicate Matches and Request New Organization** to ignore the possible TPM matches. Use the **Back** button to go back to the previous page.

kabir test abc 123 2255 Dulies Conner Blvd Henrdon, VA 20171-4674, United States	62	119762651	View Details
Jetty CA FULLINITA 6995219 UAT 2325 Duiles Comer Bivd Hendron, VA2 0171-657, United States	62	110476790	View Details View in LMP2P
Back Ignore Duplicate Matches and Request New Organization Cancel Request			

Screenshot 8: Resolve Duplicates Page (bottom)

#### 4.4 Enter Organization Information during Request New Org

The fields that will be displayed to you in the **Organization Summary** page during the **Request New Org** process depend on:

- Your assignedrole
- The profile type(s) of the organization that is beingcreated.

#### 45 Request/Invite Organization

There are various types of profiles available within TPM.

- Full (Regular)
- Full (Expedited)
- RFx or QA (with users)
- Profile with no users (NonPO, PCard, QA (w/o users), Full (w/o users), RFx (w/o users)



Subsequent sections provide detailson invitation process for each profile type.

#### 4.5.1 Profile Type: Full (Regular)

From the **Dun and Bradstreet Search Results** page, if the organization's profile type is **Full** AND a matching organizationrecord is found in the D&B results list, click the **Select Organization** link, to perform synchronous lookup of the organization's information against the Dun & Bradstreet registry. This will automaticallyload (for a fee) the organization's information packet, overwriting any information that may have been previously entered by you with that coming from Dun & Bradstreet. The system will display the **Organization Summary** page with this information already populated.

We found existing Organi	zations in D&B that matched	your search. You may load one of	of the matches or continu	ue to create a new vendo	organization.	
Organization Name:		DUNS Number:		801318168	]	
Address 1:		City:				
Address 2:		State/Province:				
		(Enter IS() two charact	ter values e.g. NY for	New York)		
Zip/Postal Code:		Country:	ter values, e.g., NY for l	Please Select		
Zip/Postal Code: Back Cancel Requi	est Revise Search Organization	(Enter ISO two charact Country:	ter values, e.g., NY for l	Please Select DUNS Number	Notes	Actions
Zip/Postal Code:	est Revise Search Organization	Country:	ter values, e.g., NY for l	Please Select DUNS Number	V	Actions

Screenshot 9: Organization Summary page

In all cases, whenever the **Select Organization** option is selected, if data coming from D&B fails the data validation checks (as specified in the tables in the SRS), the system will fail that record and display an error message to the user. The Supplier would need to be contacted out of bandto update that record with D&B.

If the organization's profile type is **Full** and youdo not find a matching organization in the **D&BSearch** results, you will NOT BE able to complete the **Request New Organization** process for this organization unless the **Do not Dun** flag is set. The **Skip D&B** button on the basic information page is not available.

**NOTE:** Only the CA role can set the **Do Not DUNS** flag on a Full Profile. This will enable the **Skip D&B** button.

If an organization's packet is successfully loaded from D&B and youare on the **Organization Summary** page, OR if the organization is marked as **Do Not DUNS** and you have skipped the **Dun and Bradstreet Search Results** page to the **Organization Summary** page, you will be able to make any additional modifications to the organization's record, and then click **Invite to LMP2P** to complete the initial creation of this organization's profile and invite the supplier to participate in LMP2P.

Clicking Submit Request will displaythe following invitation page:



Reid Test Two - Complete Invitation		
Organization Name:	Reid Test Two	
Exostar ID:	117357793	
MPID:	82f2a958-a012-4240-949a-f1980bdc3850	
DUNS Number:		
Full Name of Invitee (first, last name):	David Berry	
E-Mail address of invitee:	daniel.reid@exostar.com	
*** Please note that this message will be going to the Vendor! ***:		
	l	Send Cancel

#### Screenshot 10: Invitation page

Clicking Send will:

- i.) Create an organization account for this supplier in TPM with an LMP2P status of **Invited** and profile type status set to **REQUESTED**.
- ii.) Send an email notification to the Main Contact, providing instructions on how to register their organization for MAG and LMP2P application.
- iii.) A copy of this email will be sent to Exostar to ensure that if a supplier loses their copy of the email or never received it as a result of a typo or incorrectemail, Exostar Customer Support is able to access and update the supplier's organization account and re-send the email to the correctemail address.
- iv.) If the invitation is for an organization that already exists in MAG, the email will be sent to the MAG Organization Administrators as well as to the TPM Main Contact.

**NOTE:** An automatic reminder email will be sent out to the contact person noted on the request if after 7 calendar days the organization has not completed its registration.

#### 4.5.2 Profile Type: Full (Expedited)

For a **Full**, expedited organization, if a matching organization record is found in the D&B results list, clicking **Select Organization**, will work the same way as it does for the **Full** regular profile, e.g. the system will also performa synchronous lookupof the organization's information against the Dun & Bradstreet registry and will automatically load (<u>for afee</u>) the organization's information packet, overwriting any information that may have been previously entered by the user with that coming from Dun & Bradstreet. The system will display the **Organization Summary** page with this information already populated (similar to **Full** regular). If no matching organization record is found in the D&B results list, you will be able to go back to the basic information page and select the **Skip D&B** button to go straight to the **Organization Summary** page. No information will be loaded from D&B.

From the **Organization Summary** page, you will be able to click **Send to Buyer Approver** to send this expedited request to an LM Buyer Approver for approval.

Clicking Send to Buyer Approver will displayan invitation page. You will be able to click Send to:

- i.) Create this organization in the TPM with an LMP2P status of **Pending LM Mgr Approval** and profile type status set to **REQUESTED**.
- ii.) Send an email to the specified LM Buyer Approver, CC'ing user as a backup



**Note:** Although the expedite request will be emailed to one specific LM Buyer Approver, it could technically be approved by any LM Buyer Approver.

**NOTE:** An automatic reminder email will be sent out to the contact person noted on the request if after 7 calendar days the request has not been picked up from the queue.

#### Process Expedite Request – LM Buyer Approver

The LM Buyer Approver will be able to clickon the link in the email to be federated into TPM to the request. They can also login to TPM, clickon **My Open Requests**, and click the **View Request** link in one of the requests in the queue.

Organization	Search Request New Organization	y Open Requests Reports					
My Open Red	juests						
Request Type:	My Open Requests 🔻						
Request ID •	Vendor •	Status o	Date Requested •	Requester	Invitee Name	Invitee Email	ults Per Page 25 • Actions
117904040	US TEST COMPANY 532 899 EATON AVE BETHLEHEM, PA 180251000, United States	Pending Exostar Approval	10 Aug 2011	Requester1 M Lmcotest	Blue Water	prasanna jetty@exostar.com	View Request
118152217	Test1_Org_10072011 13241 Woodland Park Herndon, VA 20171, United States	Pending Exostar Approval	07 Oct 2011	Requester1 M Lmcotest			View Request
110764219	US TEST COMPANY 834 899 EATON AVE BETHLEHEM, PA 180251000, United States	Pending Exostar Approval	05 Dec 2011	Requester1 M Lmcotest			View Request

Screenshot 11: My Open Requests page

Clickon anyheader on the My Open Requests page to sort the results by that field.

The default requests displayed will be 25 results per page. To change, simply select from the options in the drop down list box.

Should the list of returned organizations exceed 1 (one) page, use the arrow buttons to navigate back and forth or click on a page number to be taken to a specific page.



ganization Summary					
isiness Description					Next
ompany Profile	Organizatio	on Name:	Vendor Pcard June 18th	Status:	Pending LM Manager Approval
erts	Address 1:		Address	Address 2:	
ocio-economic	City:		city	State/Province:	state
elf-certification	ZIP/Postal	Code:	23233	Country:	UNITED STATES
story	Main Busin	ess Phone:		DUNS Number:	
B Other Information	Exostar ID:		119870398	Organization ID:	EX0119870398
oreign (Non-U.S.) / omestic (U.S.) Owned	Exostar MP	ID:	9b067c05-1d5d-454e-a476- ccbd6aafa85f		
yments/Remittance	Profile Ty	ре	Status		
ontacts	QA	Requested			
	RFx	Requested			
ions	P-Card Non-PO	Dequested			
lose	Full	Requested			
pprove Request eny Request	Intra-Lockhe Non-eComm	ed Martin Work Tra erce:	nsfer Agreement (IWTA): G	overnment Entity:	1
	QA With Us	ers:			

Screenshot 12: LM Buyer Approver Organization Summary Page

The LM Buyer Approver will be able to **Approve** or **Deny** anexpedited request. If denying therequest, they will be required to provide **Deny** comments. Clickon **Close** to close therequest without makingchanges.

When a request is denied by the LM Buyer Approver, the system sends a **Request Denied** email to the user who initiated the request. The status of the request will be set to **Deactivated**, and it willno longer be visible in the LM Buyer Approver's **My Open Request** queueafter 30 days.

If approving the request, the LM Buyer Approver will be required to provide Approval comments.

When a request is approved by the LM Buyer Approver:

- i.) The system displays a confirmation message to the LM Buyer Approver and sends a **Request Approved** email to the user who initiated the request.
- ii.) The status of the request will be set to **Invited**, andit willno longer be visible in the LM Buyer Approver's **My Open Request** queue.
- iii.) An email will be sent to organization's company contact, providing instructions on how to register their organization for the LMP2P application.
- iv.) A copy of this emailwill be sent to an Exostar resource account so that if a supplier loses their copy of the email or never received it as a result of a typo or incorrect email, the EPA can access this account and send the email to the correct email address.
- v.) If the invitation is for anorganization that already exists in MAG, the email will be sent to the MAG Organization Administrators as well as to the TPM Main Contact (as opposed to the company contact as mentioned earlier).



**NOTE:** An automatic reminder email will be sent out if after 7 calendar days if the organization has not completed its registration.

If within 14 calendar days from the invitation the organization has completed its registration, the organization's status will be set to **Pending Exostar Admin** and the registration request will be routed to the EPA for approval.

If after 14 calendar days from the invitation the organization has not completed its registration process (thereby converting this profile from **Expedited** to **Full**), the system will set the organization's status to **Expired**.

Once an expired organization completes and submits their profile, the system willroute the request to the EPA and will set the organization's status to **Pending Exostar Admin**.

#### 4.5.3 Profile Type: RFx or QA (with users)

If the organization's profile type is **RFx** or **QA** flagged as **Provision QA withusers** AND NOT **Full**, AND a matching organization record is found in the D&B results list, when you select the organization and click **Select Organization**, the system will copy the DUNS number and other core information of the selected organization into the **Organization Summary** page.

Upon entering all required organization profile information, you will be able to click **Submit Request**. Doing this will promptyou to first specify the organization's MAG officers (Organization Administrator, LMP2P Application Administrator, Company Contact) and then submit the request.

Upon submission:

- i.) The system will kickoff an asynchronous batchlookupof the organization's information against the Dun & Bradstreetregistry. Basedon current D&B processes, this could take up to 3 weeks or more to complete (not an Exostar system issue).
- ii.) The system will create this organization in the TPM with an LMP2P status of **Pending Exostar Approval** and profile type status set to **REQUESTED**. This will be propagated to Lockheed's EMDM.
- iii.) Upon EPA approval of the request, the system will send out login instructions to the Organization Administrator.
- iv.) After the Exostar approval and Dun & Bradstreet updates have been received, TPM will send the organization's information to Lockheed's EMDM for update.

#### 4.5.4 Profile Type: Profile with no users

i.e. NonPO, PCard, QA (w/out users), Full (w/out users), RFx (w/out users)

If the organization has a profile that does not have anyusers, e.g. is one of the following: NonPO, PCard, QA (without users), Full flagged as IWTA, NeC or Govt Entity, RFx flagged as IWTA, NeC or Govt Entity, AND a matching organization record is found in the D&Bresults list, when you select the organization and click the Select link, the system will copy the DUNS number and other core information of the selected organization into the Organization Summary page.



Upon entering all required organization profile information, you will beable to click **Submit Request** to kick off an asynchronous batch lookup of the organization's information against the Dun & Bradstreet registry. Based on current D&B processes, this couldtake up to 3 weeks or more to complete (not an Exostar system issue).

Note: If this is a Full flagged as IWTA, Govt Entity, or NeC, the batchlookups will remainsynchronous.

The system will create this organization in the TPM with an LMP2P status of **Active** and profile type status set to **ON**. This willbe propagated to Lockheed's EMDM. No EPA approval process will be initiated.

When the D&B packet is eventually returned, information coming from the Dun & Bradstreet registry will overwrite existing organization in the TPM. The TPM will send the organization's information to Lockheed's EMDM for update.

#### 4.6 Contacts

Multiple contacts canbe added to or deleted from an organization's record. Clickon **Contacts** to displaythe contact informationscreen.

Organization Summary	View more information on how	to use this site.								
Business Description	If you wish to edit or request/in	If you wish to edit or request/invite this organization, click action 'Close'> click 'Cancel Request'> Run a TPM Organization search for this vendor.								
Company Profile	The III icon indicates Dun &	Bradstreet (D&B) infor	rmation							
Alerts		on a data out (D daby nitron								
Socio-economic	YOU BY ACCESSING THE D&B INFOR RESPONSIBLE AND LIABLE FOR ANY	RMATION AGREE THAT THE CMISUSE OF THE INFORM	HE INFORMATION IS THE MATION. THIS INFORMAT	EINTELLECTUAL PROPER TION IS PROVIDED "AS IS	WITHOUT WARRANT	ORMATION PROVIDERS, IS PRO OF ANY KIND. IN NO EVENT WIL	VIDED TO YOU FOR VALIDATION P LL D&B OR ITS INFORMATION PROV	URPOSES ONLY, MA /IDERS BE LIABLE II	Y NOT BE COPIED, DOWNLOADED, OR REDISTRIBUTE N ANY WAY WITH REGARD TO SUCH INFORMATION.	ED FOR ANY REASON, AND YOU SHAL
Self-certification										
History										
Foreign (Non-U.S.) / Domestic (U.S.) Owned	View the Contacts page instru     A Main contact type is requ	uctions for help with co uired for all profiles. A l	ompleting this page. Main contact canno	ot be deleted but the	contact information	can be modified.	in the Fill	El.		
Payments/Remittance	<ul> <li>An RFQ Submittal contact</li> </ul>	type is required for an	n RFx profile.	ital, and mig. mgr (ir t	ousiness type is u	r manufacturer ) contact typ	ies are required for a null pro	ane.		
	- Allemid to contend trees in a	roquirod for a MonD(1)	nrofile							
Contacts	A Remit to contact type is i	required for a Horir O I	promo.							
Contacts Actions	Contact 1 • To start, click the Edit Cor	ntact Types button and sele	lect the Contact Type(s)	) for your contact. Then c	lick 'Close' button					
Contacts Actions Close	A Remit to contact type is 1     Contact 1     To start, click the Edit Cor     When you have complete     Contact Type: Mg Marketing M     Same As Main Address     Address 1	Itact Types button and sele d this record, you can add tgr.Debit Memo.Supplier R	liect the Contact Type(s) d another contact by clic Report Card,Parent,Mail 25 Duties Corner Bivd	) for your conflact. Then c cking the Add Another Co in Mfg Mgr,Remit To Qua	lick 'Close' button Infact button below Ity Manager, Sole Prop Address 2	vietor, Program Return to, Return	to, Accounts Receivable Mgr.Saler	a Mgr.RFQ Submitta	II. CEO. Shipping Mgr. Additional RFQ. Contact. Shipped	From Edit Contact Types
Contacts Actions Close	A Premit to Contact type is 1     Contact 1              * To start, click the Edit Con-                  * When you have complete                 * Contact Type: Mg Markeling M                  * Same As Main Address                  Address	Nact Types button and sele d this record, you can add tigr.Debit Memo.Supplier R 232 Hen	liect the Contact Type(s) d another contact by clic Report Card,Parent Mair 25 Duties Corner Bivd emdon	i) for your contact. Then c ching the Add Another Co in Mtg Mgr,Remit To Qua	lick 'Close' button Infact button below. Ify Manager, Sole Prop Address 2 State/Province	rietor Program Return to Return	to Accounts Receivable Mgr.Saler	a Mgr.RFQ Submitta	K.CEO.Shipping Mgr.Additional RPQ Contact.Shipped	From Edit Contact Types
Contacts Actions Close	A Remit to contact type is 1     Contact 1         To start, click the Edit Co-         When you have complete     Contact Type: Mg Maximum M     Same As Main Address     Address 1     City     ZigiPostal Code	Nact Types button and seld this record, you can add fgr.Debit Memo Supplier R 232 Hem 201	iect the Contact Type(s) another contact by clic Report Card, Parent, Mais 25 Dulles Corner Blvd emdon 1711-4674	) for your contact. Then c cking the Add Another Co in Mfg Mgr.Remit To Qua	lick 'Close' button infact button below. Ity Manager, Sole Prop Address 2 State/Province Country	rietor Program Return to Return	to Accounts Receivable Mgr.Saler	s Mgr.RFQ Submitta	N CEO Shipping Mgr Additional RPG Contact Shipped	From Edit Contact Types
Contacts Actions Close	A Netwink to Contact type is 1     To Tatat Click the Eat Con-     Yone you have complete     Contact Type: Mg Mankeling M     Same As Main Address     Address 1     City     Zip/Postal Code     First Name:	Nact Types button and seld d this record, you can add tor Debit Memo Supplier R 202 Prasanna	iect the Contact Type(s) d another contact by clic Report Card, Parent, Maii 25 Dulles Corner Blvd endon 1711-4674	) for your contact. Then c cking the Add Another Co in Mtg Mgr.Remit To Qua Middle Name:	dick 'Close' button Intact button below IBy Manager Sole Prop Address 2 State/Province Country	vietor Program Return to Return	to Accounts Receivable Mgr.Saler VA United States	s Mgr.RFQ Submitta	K.CEO. Shipping Mgr.Additional RPO Contact Shipped	From Edit Conduct Types
Contacts kctions Close	A realine So Contact type is 1     A start clock the Edd Coor     Tohny you have compared     Contact Type ing Startenger     Some As Main Address     Address     Address     City     Zp-Postal Code     First Name:     Last Name:	had the a roun of a roun of a last transformed of a round of a round of a round of a round of the record, you can add the record, you can add the record, you can add the round of the roun	sect the Contact Type(s) d another contact by clic Report Card, Parent Main 25 Dulles Corner Blvd midon 171-4674	) for your contact. Then c cking the Add Another Co in Mfg Mgr.Remit To.Qua Middle Name: Title:	ack 'Close' button mixed button below Ity Manager Sole Prop Address 2 State/Province Country	vietor Program Return to Return	to Accounts Receivable Mgr Sales	s Mgr.RFQ Submitta	K.CEO.Shipping Mgr.Additional RPG Contact Shipped	From Edit Contact Types
Contacts Actions Close	A return to Contact type is 1     Onion Contact Type: Jug Association to Contact Type: Jug Association Adverses 1     Contact Type: Jug Association Adverses 1     City     Zip-Prostal Code     First Name:     Jab Title:     Moto Title:     Moto Title:	Nacl Types button and select d this record, you can add tot Debit Memo. Suppler R 2027 Pranama Jetty	Net the Contact Type(s) d another contact by circ Report Card Parent, Main 25 Dulles Corner Bivd midon 1711-4674	) for your contact. Then c cking the Add Another Co daining Mg.Remit To Qua Middle Name: Tritle: Email Address: Email Address:	lick "Close" button Intact button below Itly Manager, Sole Prop Address 2 State/Province Country	Inteloc Program Return to Return Piezase Solect	to Accounts Receivable May Saler	a MgrRFG Submitta	K CEO Shipping Mgr Additional RPO Contact Shipping	I From EELE Control Bypen
Contacts Actions Close	A realine to Curran type is 1     A realing to Curran type is 1     A realing to Curran type is 1     A	Hact Types butten and sets thact Types butten and sets df this recent, you can add gr. Debt Memo. Suppler R 2027 Prasanna Jetty 800-555-2222	Section Sectio	) for your contact. Then c ching the Add Another Co ching the Add Another Co in. Mfg Mgr. Remit To Qua Middle Name: Title : Ennail Address: Confirm Email Ac	tick 'Close' button Inter button below Ity Manager Sole Prop Address 2 State/Province Country	Piezas Select. Y piezas Select. Y prasama jetty @exodar.com prasama jetty @exodar.com	to Accounts Receivable Mgr Sales	a MgrRFG Submitta	K CEO. Shipping Myr Additional RPQ Contact Shipped	From (Control System
Contacts Actions Close	A result to Culture type is 1     Contact. Out to Culture type is 1     Contact. Out to the the Contact Culture to the computer     Contact. Type I: May Contend to the Contact Culture I: May Contend to the Contact Culture I: May Contend to the Contact Culture I: Contact Cul	tad Types button and set d film receil, you can add gru Cebit Memo Suppler R 201 Prasanna Jetty 800-555-2222	lect the Contact Type(s) d andher contact by de Report Card Parent Mai 25 Dulles Corner Bive emdon 1711-4674	) for your contact. Then it is a contact of the Add Another Co duing the Add Another Co min. Mtg Mgr. Remit To Cuu Middle Namee: Title : Email Address : Confirm Email Address : Fax: Web Address :	lick 'Close' button Inter button below Ity Manager Sole Prop Address 2 State/Province Country	rietoc Program Return to, Return Presse Select	to Accounts Receivable Mgr Sale	a Mgr.RFQ Submitta	K.CEO.Shipping Mgr.Additional RPO Contact Shipped	From (Edit Condition by yours)
Contacts Actions Close	A result to Contact type is 1     Oniod 1     Oni	Ital Types butten and add and and add the recent, you can add add the recent, you can add add the recent, you can add the recent, you can add the recent, you can add the recent of the	ect the Contact Type(s) d another contact by clic Report Card Parent Main 25 Dulles Corrier Bivel emdon 171-4674	) for your contact. Then ic ching the Add Another Co duing the Add Another Co in Affg Mgr.Remit To Qua Middle Names Tible: Email Address: Confirm Email Ac Fax: w DAddress:	ack Close' button miact button below Ity Manager.Sole Prog Address 2 State/Province Country	Piezes Select. V presens Select. V presens Jeffy @excelor con present Jeffy @excelor con	to Accounts Receivable Mgr.Sales	a Mgr.RFQ Submitta	K CEO Shipping Mgr Additional RPO Contact Shipped	From Edit Constal Types

Screenshot 13: Contactspage

Clicking **Edit Contact Type** on the **Contacts** page will present2 (two) pick lists: one with all the contacttypes and the other with the current selection of contact types. Use the arrow buttons to move contact types from one pick list to the other, adding or removing that contact type from the person. An organization canhave any number of contacts for each contact type except **Main** and **Remit To**. An organization canonly have 1 **Main** contact and 1 **Remit To** contact. An organization must have a **Main** contact.



V Organization Summary	View more information on how to use this site.
💞 Business Description	Clicking on the Previous and Next buttons shall save page content and perform validation on the current page before displaying the next page.
Company Profile	The rev icon indicates Dun & Bradstreet (D&B) information. To make changes to these fields, contact D&B directly. Phone: 1-800-234-DUNS (3867), Web: www.DNB.com
V Alerts	
💞 Socio-economic	DOWNLOADED, OR REDISTIBUTED FOR ANY REASON, AND YOU SHALL BE RESPONSIBLE AND LABLE FOR ANY MISUSE OF THE INFORMATION THIS INFORMATION IS PROVIDED 'AS IS' WITHOUT WARRANTY OF ANY KIND. IN NO EVENT
Self-certification	WILL USB OK ITS INPORTATION PROVIDERS BE LABLE IN ANY WAY WITH REGARD TO SUCH INFORMATION.
💞 History	Previous Next
V D&B Other Information	
✓ Foreign (Non-U.S.) / Domestic (U.S.) Owned	<u>View the Contacts page instructions</u> for help with completing this page.     A Main contact type is required for all profiles. A Main contact cannot be deleted but the contact information can be modified.     CEO, Debit Memo, Sand PO, Shipped From, Remit to, RFO Submittal, and Mfq, Mgr (if Business Type is '0'1 Manufacturer') contact types are required for a Full profile.
V Payments/Remittance	An RFO Submittal contact type is required for an RFx profile     A Partial to contact type is required for a NorPO confile
V Contacts	Them a contract type is required for a home o promo-
💞 TPA	Contact 1  To to start click the Edit Contact Types bullion and select the Contact Type(s) for your contact. Then click "Close" bullion
Actions	When you have completed this record, you can add another contact by clicking the Add Another Contact button below.
Change D&B Number (Search) Modify P2P profile/flag Perform Recertification Close	* Contact Type: Select from available contact types on the left to add to this contact. Click close to save your selections: Add all Marketing Mgr Debit Memo Exemption 2 Exemption 2

Screenshot 14: Edit Contact Type

When a MAIN contact is added to an organization's profile, the system automatically sets the **Same as Main** flag, freezing all the Main Contact address attributes (Street 1, Street 2, City, State/Province, Postal Code & Country) so that they are in-editable. These address fields are automatically filled withvalues from the Organization address attributes so that both sets of addresses are a match. This rule is enforced even on Update actions, i.e. address fields are not updateable on the **Main** contact record.

A Remit To contact is required for a pure NonPO profile (inadditionto a Main contact).

A **Send PO** contact is not allowed when creating pure partial profile, e.g. a pure **NonPO** and/or **QA** (with or without users) and/or **PCard** and/or **RFx** onlyprofiles. The user will not be able to specify a **Send PO** contact if the profile is justome of these or a combination of these partial profiles. This will apply during upgrades as well. If the profile is upgraded to a **Full**, then this contact type will be allowed.

The following contact types are required when creating a **Full** profile or when upgrading from a partial to a **Full** profile:

- CEO,
- Debit Memo,
- Send PO,
- Shipped From,
- Remit to,
- RFQ Submittal,
- Mfg. Mgr (if Business Type is '01 Manufacturer').

The **RFQ Submittal** contact type is required when creating an **RFx** profile or when upgrading to an **RFx** profile.

A **Remit To** or **Send PO** contact cannot be deleted from any profile. They can alsonot be added to the same contact record. They **must** beentered on 2 separate contact records even if they are the same contact person.



You will be able to link (or unlink) a TPM personto an existing MAG user account. When adding a new contact, you can search for an existing MAG user account. If a match is found, you can select that contact/user to link them.

**Note:** ATPM person maybe linked to at most one MAG user account. Similarly, a MAG account may be linked to at most one TPM person. If a MAG user is linked to a TPM contact, that contact cannot be deleted.

When a TPM person is linked to a MAG user account, the contact person's attributes are pre-populated with MAG data.

#### 4.7 Address Validation

The system is configured to validate only addresses from specified countries. Currently, address validation is limited to the US and Canada addresses.

The system canperform vendor address validation on the following vendor profile types: **Full** (Regular and Expedited), **RFx**, **QA** (with & without users), **NonPO**, **PCard** that are input by users into the TPM GUI.

The address validationservice canonly be performed on the **Main Organization**, **Remit To** contact and **SendPO** contact addresses. The following address elements are validated: Address1, Address2, City, State/Province, Zip/Postal Code & Country.

For the **Main Organization's** address, the validation can be performed in the **Core Information** page. Once you enter the address and click **Skip D&B** to advance to the nextscreen, the system will perform the validation. Clicking **Search D&B** will not invoke the address validation feature because D&B addresses cannot be overwritten. If this address is later replaced by one from D&B, e.g. upon D&B load, it will not be validated at that time. Addresses coming from D&B will not be validated using this service.

Address validation is performed whenever these addresses are being added or updated (this applies to the **SendPO** and **Remit To** addresses as **Orgaddress** is noteditable during update), e.g. during the **Request new org** process and when adding or updating a contact.

If a contact's address is viewed but no changes are made to it, then no validation will be performed on it. This will be the case whether or not the address has been validated before.

The Address validation will be initiated when youenter/update an address and click **Save**, **Next**, **Previous** or if you try to navigate to another page using the left navigation menu.

When an address is being validated, the system will display the following text: "Please wait while the information entered is processed. Address validation may be performed."

If you receive successful matches for an existing address, the system will replace the user-input data with the normalized address, and will display the address that corresponds to the information returned by the service. The text will be similar to the following:

#### For Organizations:



- **US:** "<Organization>: Address was successfully matched to the US Postal Service database and may have been updated. Please inspect before proceeding."
- **Canada:** "<Organization>: Address was successfully matched to the CA Postal Service database and may have been updated. Please inspect before proceeding." **For Contacts:**
- US: "Contact<#>(<ContactFN><ContactLN>):Address was successfullymatched to the US Postal Service database andmay have been updated. Please inspect before proceeding."
- **Canada:** "Contact<#> (<ContactFN><ContactLN>): Address was successfully matched to the CA Postal Service database and may have been updated. Please inspect before proceeding."

The normalized address will be updated in the vendor master record.

If no matches are returned for an address an error will be displayed. You will then be required to correct the address and resubmit before proceeding. The error will readsomething like the following:

#### For Organizations:

- "The address you provided for <Organization>could not be validated. Please correct the address before proceeding."
- "<Organization>: Couldnot locate the city, state, or zip in the US Postal Service database. Please validate City and State or ZIP and resubmit."
- "<Organization>: Ambiguous address. There were two or more possible matches. Please correct the address and resubmit."

#### For Contacts:

- "The address you provided for Contact<#>(<Contact FN><ContactLN>) couldnot be validated. Please correct the address before proceeding."
- "Contact<#> (<Contact FN> <Contact LN>): Could not locate the city, state, or zip in the US Postal Service database. Please validate City and State or ZIP and resubmit."
- "Contact<#> (<ContactFN><ContactLN>): Ambiguous address. There were two or more possible matches. Please correct the address and resubmit."

If the address validation service is not available, the address will not be validated and will be accepted as-is. In such cases, the system will displaysome text similar to the following:

#### For Organizations:

• "The address you provided for <Organization> could not be validated but will be accepted as entered."

#### For Contacts:

 "The address you provided for Contact<#>(<ContactFN><ContactLN>) couldnot be validated but will be accepted as entered."

A separate message will be displayed for each address that is validated, e.g. if there are multiple addresses, a separate message will be displayed for each one, even if the addresses are the same for different contacts.

#### Address Validation Assumptions:



- Only the US and Canada addresses canbe validated.
- No validation of vendor address data will be done in the US Bank batchinterface
- No validation of vendor address data will be donein the D&B interface
- No validation will be done on existing addresses that are already in TPM.
- No validation of address data will be done for unsolicited profiles.
- Org address cannot be validated during 'Add profile' because the fields in the 'Core Information' page are in-editable. As such, the onlytime that unsolicited and existing TPM addresses will be validated is *after* they have been upgraded (i.e. via the 'Add profile' process), as part of Org recordmaintenance.
- If the address validation service is unavailable, no error messages will be displayed. The record will not be flagged.
- This address validation service will NOT be performed on the Mailstop field.



### **5** OPEN REQUESTS

You will be able to click on the **Open Requests** link on the TPM main page (or from the LMP2P Buyer Portal) to get to a **Request** page. The **Request** page will offer the following 3 view options:

- My Open Requests
- All Open Requests
- Approval-Pending Requests

You will be able to select any one of the options to display the corresponding view at a time

- Only an LM user with a Buyer role (i.e. Buyer, CA, SA, AA) will be able to see the **My Open Requests** option.
- Only an LM user with a Corporate Administrator role will be able to see the All Open Requests option.
- Only an LM user with a Buyer Manager role will be able to see the **Approval-Pending Requests** option.

The system will display the following items for eachorganization request in all three views:

- **Request ID:** System-generated Id for this request
- Vendor: Organization Name & Address
- **Status:** Request status
- Date Requested: Date when the request was sent by Requester
- **Requester:** Name of the LM User creating the request
- Invitee Name: Name of the Main Contact to whom the request is sent
- Invitee Email: Email of the Main Contact to whom the request is sent

The queues canbe sorted by:

- Request ID
- Organization Name
- Status
- Date Requested (set to default sort)

The status categories are:

- Invited: Organization was sent a request to complete their profile. Awaiting their response.
- Buyer In Process: LM Buyer is still in the process of creating the request.
- Vendor In Process: Organization responded to the request but didnot complete their information.
- **Pending LM Manager Approval**: Request has been routed to LM Buyer Manager for approval.
- Pending Exostar Approval: Organization completed request and is awaiting EPA approval.

#### 5.1 My Open Requests

When an LM User requests a new organization, the status of that request will be set to **Invited** and will be visible to the LM User in their **My Open Requests** list.



Organization Sear	rch Request New Organization My Open Requests Reports	Administrative					8 . S
My Open Reques	its						
Request Type: My	Open Requests *						Results Per Page 25 V
Request ID +	Vendor +	Status ¢	Date Requested +	Requester	Invitee Name	Invitee Email	Actions
110766413	US TEST COMPANY 142 899 EATON AVE BETHLEHEM, PA 18025, United States	Pending Exostar Approval	26 Jan 2009	Fnca M Lnca	Kitty Vaz	leona.vaz@exostar.com	View Request
113955517	US TEST COMPANY 173 899 EATON AVE BETHLEHEM, PA 18025, United States	Pending Exostar Approval	26 Jan 2009	Fnca M Lnca	seema gupta	leona.vaz@exostar.com	View Request
113476469	US TEST COMPANY 783 899 EATON AVE BETHLEHEM DA 1802E Linited States	Pending Exostar Approval	02 Feb 2009	Fnca M Lnca	Rose Brown	rose brown40@exostar.com	View Request

Screenshot 15: My Open Requests page

The LM user will have the ability to save a partially completed organization request. This will save the request with a status of **Buyer In Process** and will make it visible in their **My Open Requests** list.

The system will only display requests created by the LM User that is logged onto the current session. The requests in the **My Open Requests** page can be sorted by the header.

When a request is automatically deactivated due to a time out, the system will send anemail notification to the LM User that created the request.

If a request is rejected by the organization user, it is automatically deleted from the LM User's **My Open Requests** queue (as well as from the **All Open Requests** queue) and anemail notification is sent to the LM User that created that request.

The number of results that are displayed per page canbe changed via a dropdown listbox. Options will be 10, 25, 50 or 100. The default returnwill be 25 results. If the list of returned organizations exceeds 1 (one) page, click on **Next** to view additional results. To move to a specific page, click on the page number.



Responsi D +	Vender *						
Responsi 10 +	Vender *					Statute the	Fage 75. 7
		Statut *	Same descention -	Responses.	Builden Station	analise Drugt	Actions
10040900	Radifield (19) 515 (4) June June (20) Borney, Vigna (214) 210, Bitsman, Republic of	Penting Lill Maringer Associati	28 344 2688	Prise Linne	-	Auto conferente con	ficures
	NacHinddolau 2020 Urb) Anay Salas 248 Rahmi Velania 75176, 7742, Barkana Pasa	Penning Lik Harager Approval	29 Gut 2968	Proja 1, 100		Anna conference pre-	Dessent
	NuDRICHERN STOL Champe Rysons Jude 405 Calme, Villand ST-02-2012 Bearve	Netley (3 Datage System)	28 ber juni.	Prosidente			Process
(Janta)274	MF COMPARY (1993) BETT BETT Fait that Turks BR Rule, NDV 1921/1 2017, strange, Presser's Torontal Results; of	Pandrig (18 Marager Agentical	29 (bes 2004	File Line			
	Na anterant My search 2000, Anteringen Samesa	Pendig of Dataget Applicat	29 Gal 2008	Felalaca		and addresses on	PLANER
040307	ng/R/Means) Will Device Sub-DR Presse Selection and 1986 (225, automa	Pending Lift Nanager Agencies	29-0-7 2000		-		Tourse
NUTSHEET :	No announi Indy mate 21(21)11. Alterna, Preparit Technical Republic of	Perceng Lif Manager Ingenove	28 04 2858	Del come 1	-	ward (alignments (see	Taxan

Screenshot 16: My Open Requests (Buyer Approver view)

**Resume Request** – You can resume requests that are in the process of being created but have saved temporarily. Resume working on a request by clicking **Resume Request** from the **MyOpen Requests** view to continue with the request.

**View Request** – You can view requests that arecreated and arestill pending (Pending requests are any that have been submitted by an LM User, but have not yet been approved or denied by the EPA queue). You will be able to view the details of an open/pending organization request created by you by clicking the **View Request** link beside the request. Clicking **View Requests** displays the **Organization Summary** page for that organization in read-only mode.

Clicking **Close** on the request details page returns youto the **My Open Requests** page.

The LM User will be able to view the details of a request for an organization that is already subscribed to LMP2P by clicking the **View in LMP2P** link beside the request. Upon clicking this link, the user will be taken directly into LMP2P to view the organization's details.

**Delete Request** – You can delete a requested youcreated as longas the request is still in Invited status, e.g. has not been acted on by the organization user. **Resume/View** will be mutually exclusive, e.g. you will have the choice of oneor the other. You will be able to delete a request that you created, if it has not been picked up by the organization. Clicking **Delete** beside a particular request will prompt for confirmation. Upon confirmation, the system will delete the request from your queue.

If a request remains in any one state for up to 90 days (configurable), the system will automatically deactivate that request, deleting it from your queue. This will be updated in the TPM and sent to EMDM.

Note: Auto-deletion of stale requests will not apply to those in Pending Exostar Approval status (RFC3263).



#### 5.2 All Open Requests

The **AllOpen Requests** view will display all requests created by the current user, all requests created by other LM buyers, and all requests that are pending approval. Available actions will be: **View**, **Delete**. These will work the same way as in the **My Open Requests** view.

You will be able to sort the results by the headers on the **All Open Requests** page.

Change the number of results that are displayed per page via a dropdown list box. Options will be 10, 25, 50 or 100. The default return will be 25 results.

If the list of returned organizations exceeds 1 (one) page, click on **Next**to view additional results. To move to a specific page, clickon the page number.

#### View Request

An LM User with the role of Corporate Administrator will be able to view the **All Open Requests** option. They will also be able to view requests that have not yet been submitted by the buyer/requester, e.g. requests that have the status of **Buyer In Process**.

The Corporate Administrator will be able to filter the display of requests by Organization Name. To filter the requests displayed, enter an organization name or part of an organization name and click **Search**. This will modify the list of requests displayed per the searchcriteria entered.

#### **Delete Request**

An LM User with the role of Corporate Administrator will be able to delete requests from the **All Open Requests** view that are in any one of the following states:

- Pending LM Mgr Approval
- Invited
- Buyer In Process
- Expired

When a request is deleted by a Corporate Administrator, an email notification will be send to the LM User that created that request. If the request is deleted by its creator, no email notification will be sent.

#### 53 Approval-Pending Requests

The Approval-Pending Requests view willdisplay all requests that are pending approval. Available actions willbe: **Process**. (See earlier description of this for more details).



### **6** ORGANIZATION PROFILE MANAGEMENT

#### 6.1 **Profile Update**

The LM User and Org Adminroles willbe able to modify an LMP2P organization's information in the **Organization Summary** pages. Whenan organization's information has been modified by an LM User or EPA or by a system (e.g. as a result of a D&B Refresh), the system will send anemail notification to the Org Admin(s) with a list of the fields that have been modified.

Upon savingthe changes made, all organization profile updates will be sent to EMDM.

#### 6.2 Upgrade Profile Type/Flag

This use case assumes that an organization is an LMP2P organization, and therefore already has at least 1 (one) Organization Profile Type. Updating an organization's profile type will always be initiated by an LM User.

An LM User (with role Buyer, AA, CAor SA) will have the ability to add additional profile types and flags (with the right permissions) to an organization that already exists in LMP2P. To initiate this process, the LM User will click the **Modify P2P Profile/Flag** on the **Organization Summary** page. This will display the **Basic Information** screen. They will be able to add profile and/or clear any of the non-user flags and then submit the request.

**Note:** The organization's core information willbe in-editable.

Organization Summa	ny 🛛
Business Descripti	on
Company Profile	
Alerts	
Socio-economic	
Self-certification	
V History	
Foreign (Non-U.S.) Domestic (U.S.) Owne	/ d
Payments/Remitta	nce
Contacts	
MAG Information	
Actions	
Modify P2P profile/fl	ag
Close	-

Screenshot 17: Modify P2PProfile/Flag



Only a CA will be able to clear the **Non-eCommerce**, **IWTA** and **Government Entity** flags from an organization's profile.

**Note:** While the SA can set the **IWTA** and **Government Entity** flags (and NOT the Non-eCommerce flag), they cannot clear/un-flag it.

Request Organization - Basic Information			
Enter Basic Information and select the Profile Type(s) for the Depending on the Profile Type(s), you can search in D To search in D&B, you must enter DUNS Number OR ( To skip the D&B Search, you must enter Organization i	organization you are trying to request. &B for this organization or skip D&B search an Organization Name, State and Country Name, Address 1, City, State, ZIP, and Country	I continue to request a new organization.	
Organization Nat	ne:	DUNS Number:	(Enter numbers only, no dashes or spaces)
Addres: (Need physical address, no PO B	s 1: ox)	Address 2:	
С	ity:	State/Province: (Enter ISO two character values, e.g., NY for New York)	
Zip/Postal Co	de:	Country:	Please Select •
Active Profiles Profile Type			
Profile	Flag		
<ul> <li>Full (Select if purchase orders will be placed)</li> <li>RFx</li> </ul>	<ul> <li>Expedite</li> <li>Intra-Loc</li> <li>QA With</li> </ul>	d (Select only if an emergency purchase order is needed) kheed Martin Work Transfer Agreement (IWTA) Jsers	
🖉 QA	Governm	ent Entity	
Non-PO	Non-eCo	mmerce	
P-Card	<ul> <li>PIM Req</li> <li>Do Not D</li> </ul>	ulired UNS (Select this option to skip the D&B Search)	
Cancel Request Skip D&B Search D&B			

Screenshot 18: Basic Information page

If an organization already has user-enabled profiles, i.e. if it is already setup as having users, it cannot be changed back to nothaving users. This means that the **Non-eCommerce**, **IWTA** and **GovernmentEntity** flags cannot be changed from not being setto being set. The only way that this can happen is if an org request is made to clear any one of these flags, and the request is deleted by the LM CA, or rejected by the Org Admin or EPA.

If the organization was previously a **Full** profile and either one of the **Non-eCommerce**, **IWTA** or **Government Entity** flag was set, and now the request was to clear the flag, this will initiate an invitation being sent to the organization's Main Contact, as if this was a new request.

**Note:** The LM User experience would be very similar to the Request New Org process, except that since all of the profile information would already have been provided, both the LM User and the Organization Admin would be able to get through the process much quicker.

If the organization was previously an **RFx** or **QA** w/usersprofileand either one of the **Non-eCommerce**, **IWTA** or **Government Entity** flags was set, and now the request was to clear the flag, this will initiate the process where the LM User specifies the MAG officers and submits the request to the EPA.

When an organization going from being LM-managed (e.g. **Full**, **Non-eCommerce** = true) to vendor-managed (e.g. **Full**, **Non-ecommerce** = false), if the LM user hadpreviously provided values in the self-certification fields, the Org Admin will not be required to do so again. They will however be forced througheachscreen as during the regular Organization Registration process, and sowill have a chance to view/confirm the entries on that screen.



The **Expedited**, **QA w/users** and **Do Not DUNS** flags will only be allowed to be set to **True** during create or upgrade requests.

Once set, the **Expedited**, **QA w/ users** and **Do Not DUNS** flags cannot be reset. Functionality to be able to reset the **Do Not DUNS** flag willbe implemented ina future TPM release.

The **Expedited** flag interferes with the **Non-eCommerce**, **IWTA** and **GovernmentEntity** flags such that if set, these flags cannot be changed. As such, if the **Expedited** flag is set, it would need to be cleared before an LM User can clear any of the **Non-eCommerce**, **IWTA** or **Government Entity** flags. The process for clearing the **Expedited** flag is manual. The request to do this will need to be made outside of the system, by an LM CA or SA to Exostar. Once an organization with users (i.e. **Full**, **not flagged as IWTA/Non-eCommerce/Govt Entity**, **RFx** & QA with **users**) is created (during the Request NewOrg process), the system will automatically disable the **QA with users** flag so that it cannot be clicked on during the **Add Profile** process.

The LM user will be able to **Skip the D&B** search during **Modify P2P profile/flag** much like they would during the initial creation of an organization, taking them directly to the **Organization Summary** pages

If the LM User chooses the **Search D&B** option, the system will display the **D&BSearch** results page, from which the LM User will be able to select the organization and proceed to the **Organization Summary** pages. The same rules for synchronous and asynchronous loading will apply here as they do during the Request New Org process.

#### 6.3 FULL Profile

Once the LM User submits the request, if the **Full** profile is being added and the organization is new to MAG (for instance, if it did not previously have any users), the system will display the Invitation page with the following fields:

Organization Name

- Exostar ID
- MPID
- DUNS Number
- Full Name of Invitee
- Email Address of Invitee
- Additional Instructions/Comments

All fields will be read-onlymode, except the **Additional Instructions/Comments**. The **Full Name** and **Email Address** fields will be automatically pre-filled with the Main Contact information. Submitting this request will send anemail notification to the POC (same as during Request New Org).

If the organization is already registered in MAG, the system will display the Invitation page same as above, however upon submission of the request, the invitation will automatically be sent to all Org Admins for that organization, in addition to the POC.

If the LM User is adding a **Full** profile to an organization that is already registered in MAG, the process is completed once the invitation is accepted by the Organization Administrator.



#### 6.4 **RFx or QA w/ Users Profile**

If an LM User is adding an **RFx** or **QA** with users profile to an organization that is NOT registered in MAG, then once the LM User puts in a request to that organization in TPM, the system will kickoff the EPA approval workflow similar to the way that it does for the Request New Org process.

If an LM User is adding an **RFx** or **QA** with users profile to an organization that is already registered in MAG, then once the LM User puts in a request to that organization, the process will be completed, .e.g. no workflows (such as the EPA workflow) will be kicked off. However, if the organization didnotal ready have an LMP2P App Admin (e.g. if this is an SCP org for instance), then when the LM User submits the request, the system will display the Invitation Confirmation page to the LM User with the option to add instructions.

**Note:** This is different from the way that it works during the Request New Org process.

Upon submission of the request, the invitation will automatically be sent to all OrgAdmins for that organization.

If adding a **QA withusers** profile to an **RFx** org, the system will automaticallygray out the **QA with users** flag, making it read-onlysuchthat the LM User is notable to select it. If an **RFx** profile is being added to a **QA with users** organization(or vice versa), the LM User will not be required to specify any Org Admin, Company Contact, or LMP2P AppAdmin.

#### 6.5 NonPO/PCard/QA without Users Profile

Adding a **NonPO**, **PCard** or **QA** without users profile to an organization will work thesame way as it does during the Request New Organization process.

An LM User will not be able to add a **QA with users** profile to a QA organization.

An **Add Profile** request cannot be made while a previous request is active, i.e. an LM User will not be able to add a profile to an organization if a request is open for that organization.

#### 6.6 Sample Add Profile Use Cases

The following section identifies some of the basic **Add Profile** use cases that will be available in the TPM, and what the system behavior will be for each:

#### Use Case #1:

**Use Case Name:** Add **Full** profile to **NonPO/PCard/QA without users** profile **Pre-Conditions:** Organizationalready exists in MAG (e.g. for SCP) **Post-Conditions:** Organization has the **Full** profile type

Step – User	User action	System response
1 – LM User	Perform org search	Display search results
2 – LM User	Click View/Edit beside anorg	Display Org Summary pages
3 – LM User	Click Add LMP2P profile	Display Basic Information page



4 – LM User	Select <b>Full</b> (system auto checks all unchecked profiles except PCard if unchecked), Click <b>Skip D&amp;B</b>	Display Org Summary pages
5 – LM User	Provide all required info for <b>Full</b> profile; LM User is NOTprompted to specify LMP2P App Admin. Click Invite	Display Invitation page with option for additional comments only
6 – LM User	Submit invitation	Invitations will go to all Org Admins for that Org.
7 – Org Admin	Clicklinkinemail	Display Org Summary pages
8 – Org Admin	Fill in all attributes, specifyLMP2PApp admin ->AcceptLMTPA->Submit request	Update org recordin TPM to reflectnew profile and attributes.
Alternative Path		
4 – LM User	Select Full (system auto checks all unchecked profiles except PCard if unchecked), Click Search D&B	Display D&B Search Results page
5 – LM User	Select an org (synch)	Display Org Summary pages

Use Case 1: Add Full profile to NonPO/PCard/QAwithout users profile

**NOTE:** If Org is new to MAG, they will be prompted to accept the Exostar Master Service Agreement (MSA). If Org has previously agreed to agreements for SCP, FP, RSP and/or RRGSP, they would not need to do so again and no amendments will be necessary.

#### Use Case #2:

Use Case Name: Add Full profile to NonPO/PCard/QA without users profile Pre-Conditions: Organizationis NOT in MAG

Post-Conditions: Organization has the Full profile type

Step – User	User action	System response
1 – LM User	Perform org search	Display search results
2 – LM User	Click View/Edit beside anorg	Display Org Summary pages
3 – LM User	Click Add LMP2P profile	Display Basic Information page
4 – LM User	Select <b>Full</b> (system auto checks all unchecked profiles except PCard if unchecked), Click <b>Skip D&amp;B</b>	Display Org Summary pages
5 – LM User	Provide all required info for <b>Full</b> profile; LM User is NOTprompted to specify LMP2P App Admin. Click Invite	Display Invitation page with POC info pre-filled andoption for additional comments



6 – LM User	Submit invitation	Invitations will go to POC			
7 – Org Admin	Clicklinkinemail	Display Org Summary pages			
8 – Org Admin	Fill in allattributes, specify OrgAdmin, Company Contact & LMP2P Appadmin -> Accept Exostar MSA -> Accept LM TPA -> Submit request	Route workflow to EPA			
9 – EPA	Approve request	Update org recordin TPM to reflectnew profile andattributes; Send MAG credentials to Admins			
Alternative Path					
4 – LM User	Select <b>Full</b> (system auto checks all unchecked profiles except PCard if unchecked), Click <b>Search D&amp;B</b>	Display D&B Search Results page			
5 – LM User	Select an org (synch)	Display Org Summary pages			

Use Case 2: Add Full profile to NonPO/PCard/QAwithout users profile

#### Use Case #3:

Use Case Name: Add Full profile to RFx or QA with usersprofile Pre-Conditions: By default, Organization already exists in MAG Post-Conditions: Organization has the Full profile type

Step – User	User action	System response			
1 – LM User	Perform org search	Display search results			
2 – LM User	Click View/Edit beside anorg	Display Org Summary pages			
3 – LM User	Click Add LMP2P profile	Display Basic Information page			
4 – LM User	Select <b>Full</b> (system auto checks all unchecked profiles except PCard if unchecked), Click <b>Skip D&amp;B</b>	Display Org Summary pages			
5 – LM User	Provide all required info for <b>Full</b> profile; Click <b>Invite</b>	Display Invitation page with option for additional comments only			
6 – LM User	Submit invitation	Invitations will go to all Org Admins for that Org.			
7 – Org Admin	Clicklinkinemail	Display Org Summary pages			
8 – Org Admin	Fill in all attributes -> AcceptLMTPA -> Submit request	Update org recordin TPM to reflectnew profile and attributes.			
Alternative Path					



4 – LM User	Select <b>Full</b> (system auto checks all unchecked profiles except PCard if unchecked), Click <b>Search D&amp;B</b>	Display D&B Search Results page					
5 – LM User	Select an org (synch)	Display Org Summary pages					
Use Case 2: Add Full profile to PFy or OA with users profile							

Use Case 3: Add Full profile to RFx or QA with users profile

**NOTE:** If Org is new to MAG, they will be prompted to accept the Exostar Master Service Agreement (MSA). If Org has previously agreed to agreements for SCP, FP, RSP and/or RRGSP, they would not need to do so again and no amendments will be necessary.

#### Use Case #4:

#### Use Case Name: Add RFx to NonPO/PCard/QA without users profile

**Pre-Conditions:** Organizationalready exists in MAG (e.g. for SCP) **Post-Conditions:** Organization has the **RFx** profile type

Step – User	User action	System response						
1 – LM User	Perform org search	Display search results						
2 – LM User	Click View/Edit beside anorg	Display Org Summary pages						
3 – LM User	Click Add LMP2P profile	Display Basic Information page						
4 – LM User	Select RFx, Click Skip D&B	Display Org Summary pages						
5 – LM User	Provide all required info for RFx profile; LM User is NOTprompted to specify LMP2P App Admin. Click Invite	Display Invitation page with option for additional comments only						
6 – LM User	Submit invitation	Invitations will go to all Org Admins for that Org.						
7 – Org Admin	Clicklinkinemail	Display Org Summary pages						
8 – Org Admin	Fill in all attributes -> Specify LMP2P App Admin. No Acceptanceof LM TPA > Submit request	Update org recordin TPM to reflectnew profile andattributes; Send MAG credentials to LMP2P App Admin (if new to MAG)						
Alternative Path								
4 – LM User	Select <b>RFx</b> , Click <b>Search D&amp;B</b>	Display D&B Search Results page						
5 – LM User	Select an org (asynch)	Display Org Summary pages						
Use Case 4: Add PEx to NenDO/DCard/OA without users profile								

Use Case 4: Add RFx to NonPO/PCard/QA without users profile

#### Use Case #5:

**Use Case Name:** Add **Full** to **NonPO/PCard/QA without users** profile & flag as **IWTA**, **NeC** or **Govt Entity Pre-Conditions:** Organization may not already exists in MAG (e.g. for SCP) **Post-Conditions:** Organization has the **Full** profile type with flag **IWTA**, **NeC** or **Govt Entity** 



Step – User	User action	System response			
1 – LM User	Performorgsearch	Display search results			
2 – LM User	Click View/Edit beside anorg	Display Org Summary pages			
3 – LM User	Click Add LMP2P profile	Display Basic Information page			
4 – LM User	SelectFull, SelectIWTA, NeC or Govt Entity, Click Skin D&B	Display Org Summary pages			
5 – LM User	Provide all required info for <b>Full</b> profile -> Click <b>Submit Request</b>	Update org recordin TPM to reflectnew profile and attributes.			
Alternative Path					
4 – LM User	Select <b>Full</b> , Select <b>IWTA</b> , <b>NeC</b> or <b>Govt</b> <b>Entity</b> , Click <b>Search D&amp;B</b>	Display D&B Search Results page			
5 – LM User	Select an org (synch)	Display Org Summary pages			

Use Case 5: Add Full to NonPO/PCard/QAwithout users profile & flag as IWTA, NeC or Govt Entity

#### Use Case #6:

Use Case Name: Add RFx to QA with users profile Pre-Conditions: By default, Organization already exists in MAG Post-Conditions: Organization has the RFx profile type

Step – User	User action	System response			
1 – LM User	Performorgsearch	Display search results			
2 – LM User	Click View/Edit beside anorg	Display Org Summary pages			
3 – LM User	Click Add LMP2P profile	Display Basic Information page			
4 – LM User	Select RFx, Click Skip D&B	Display Org Summary pages			
5 – LMUser	Provide all required info for RFx profile	Update org recordin TPM to reflect new			
	-> Click Submit Request	profile andattributes.			
Alternative Path					
4 – LM User	Select RFx, Click Search D&B	Display D&B Search Results page			
5 – LM User	Select an org (asynch)	Display Org Summary pages			

Use Case 6: Add RFx to QA with users profile



# 7 ALERTS & NOTIFICATION

#### 7.1 Organization Debarment & Other D&B Alerts/Critical Events

Exostar will receive the following critical event notifications from D&B and will set the corresponding flags in the vendor master and sendup dated organization record to EMDM:

- Debarment
- Outof Business
- High Risk
- Bankruptcy
- Paydex

**NOTE:** LM will be responsible for sending out all critical event notification emails to various Site Administrators for the impacted purchasing organizations. LM will also handle all blocking logic (procure block & payment block).

If upon D&B refresh anyone of these fields is cleared, this update will be sent to EMDM.

The valid values for each of the <u>alert codes</u> will be as follows:

**Debarment Code**: D=Debarred, N / Blank=Not Debarred, F=Family Debarred. Default is blank.

Out Of Business ID: F=Business discontinuance with outstanding debt, Blank.

**<u>High Risk</u>**: H-R = High Risk(business which exhibits characteristics of a fraudulent business), B-D = Business Deterioration (business which exhibits significant signs of financial distress or operating difficulty, including businesses that may be on the verge of failure), Blank.

**Bankruptcy:** B=Open bankruptcy, N=Bankruptcyhas been closed, dismissed, discharged, void, or never bankrupt. **Paydex:** A numerical score characterizing the payment experiences of a business, Blank.

Exostar will automatically send anemail notification to a specified LM distribution list every time one of these alerts or notifications is received from D&B.

#### 72 Organization Mergers & Acquisitions per Dun & Bradstreet Load/Refresh

Exostar is responsible for updating the organization information in case of Mergers & Acquisitions. This information will be reflected in the organization information.

#### 73 Denied Parties List

Exostar will disable all organizations that are in the Denied Parties list. If the organization's account is deactivated by Exostar, anupdate will be sent to EMDM.

If the organization is an LMP2P subscriber, the EPA will sendan emailalert of this event.



## 8 <u>REPORTS</u>

The LM User will have the ability to generate the following types of reports from the LMP2P Buyer Portal:

- Profile Registration Report
- Profile Expiration Report
- D&B Refresh Report (Onlya CA cangenerate this report).

Only LM Users with the following roles willhave the ability to run the **Profile Registration** and **Profile Expiration** reports: LM Buyer, CA, SA and AA. The regular Viewer role (i.e. Inquiry only) will be not able to do so.

Organization Search	Request New Organization	My Open Requests	Reports						
TPM Reports									
Profile Registration Report									
From: Search solicited organization	ons only 🕢 Business: All								
Profile Expiration Repo	rt								
From: View Report	To:								
Close									

Screenshot 19: Reports Page

#### 8.1 **Profile Registration Report**

The purpose of the Profile Registration Report is to provide the number of organizations that have registered or changed their profile in the Exostar Customer Information Centerwithin the past calendar month.

An LM User (with the appropriate permissions/authorization) will have the ability to generate **the Profile Registration** reporton an as-neededbasisby clicking **Reports** from the LMP2P Buyer Portal. This will display a **Reports** page.



In the Profile Registration Reports ection of the **Reports** page, the LM User will be able to select various criteria from the following options against which the report will be run. Upon specifying the desired criteria and clicking **View Report**, the system will generate the report.

eport										
rated on Mon N	lov 11 10:13	22 EST 2019								
Note: All dates are based on Greenwich Mean Time (GMT). There may be a time lag between when the organization profile is created and when it shows up in this report										
Registered	Changed	Deactivated								
4	1297	0								
3	1128	2								
3	1058	0								
10	3483	2								
6	1372	0								
3	1310	0								
7	1670	0								
8	1330	0								
5	573	0								
3	579	0								
14	600	8								
10	718	0								
3	575	0								
9	647	1								
1	252	1								
69	9635	10								
79	13118	12								
	eenwich Mean 1 Registered 4 3 3 10 6 3 7 8 5 3 14 10 3 9 1 6 9 1 6 9 1 7 9	Registered         Changed           4         1297           3         1128           3         1058           10         3483           6         1372           3         1319           7         1670           8         1330           5         573           3         579           14         600           10         718           3         575           9         647           1         252           69         9635           79         13118	Registered         Changed         Deactivated           4         1297         0           3         1128         2           3         1058         0           10         3483         2           6         1372         0           3         1319         0           7         1670         0           8         1330         0           5         573         0           3         579         0           14         600         8           10         718         0           3         575         0           9         647         1           1         252         1           69         9635         10							

#### Screenshot 20: Profile Registration Sample Report

- The **Profile Registration** Report will display yearly totals at the end of each year, and will display grand totals at the bottom of the page.
- Clicking **Close** will close out the report, returning the user to the **Reports** page.
- Clicking **Print** will display the standard print command window from which the user can print a copy of the report.
- Clicking **Save** will display the standardsave command window where the user canspecify the filename and location that it should be saved to. The LM User will have the ability to save the **Profile Registration** Report in .CSV format (viewable using Microsoft Excel).



#### 8.2 **Profile Expiration Report**

The purpose of the Profile Expiration Report is to provide a list of organizations whose certification of their profile has expired or is about to expire, depending on the date rangespecified by the user.

An LM User (with the appropriate permissions/authorization) will have the ability to generate the **Profile Expiration** Report on an as-needed basis by clicking **Reports** from the LMP2P BuyerPortal. This will display a **Reports** page.

In the Profile Expiration Reports ection of the **Reports** page, the LM User will be able to select various criteria.

Upon specifying the desired criteria and clicking View Report, the system will generate the report.

If no **From** and **To** dates are specified, the system will display all expired organizations going back for 1 year, e.g. all organizations whose Expiration Dates fall within the last year.

Organization Search	h Request New C	rganization	My Open Requests	eports							
Profile Expiration Report											
rofile Expiration Report generated on Mon Nov 11 10:19:12 EST 2019 Information on expired Expedited profiles only goes back 90 days. Expedited profiles that have been expired for 90 days or more have been expunged from the system and are not displayed.											
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20											
Expiration Date • Reson : Status • Organization Name • Exostar ID • DUNS • Contact Phone Number • Contact Email Address • County • Org									Org Profile Type +		
2018-11-11 06:40:48.023	No re-cert-3-yr expiration	Expired	AEROTEX UK LLP		119703653	732806836	Richard Moser	01252 540693	richard.moser@aerotex.co.uk	United Kingdom	Full,RFx,QA,Non-PO
2018-11-11 08:11:39.677	No re-cert-3-yr expiration	Expired	HYDRASEARCH CO., INC.		115890488	073762221	DAVID CAREY	410-643-8933 x120	dcarey@hydrasearch.com	United States	Full,RFx,QA,Non-PO,P- Card
2018-11-11 08:54:14.54	No re-cert-3-yr expiration	Expired	WEAVER MANAGEMENT GROU	JP LLC	118477008	067027875	Jack Weaver	6014827966	Imgdiversified@gmail.com	United States	Full,RFx,QA,Non-PO
2018-11-11 10:06:01.873	No re-cert-3-yr expiration	Expired	SPECIALIST COMPUTER CENT	RES PLC	114395299	227720521	Abigail Carr	44 121 766 7000	abigail.carr@scc.com	United Kingdom	Full,RFx,QA,Non-PO
2018-11-11 12:11:13.607	No re-cert-3-yr expiration	Expired	LOCKHEED MARTIN SIPPICAN,	, INC.	104068167	032046666	Karen Borges	774-553-6137	karen.j.borges@lmco.com	United States	Full,RFx,QA,Non-PO
2018-11-11 12:43:18:257	No re-cert-3-yr expiration	Expired	METAL CONCEPTS, INC.		113365232	173373325	AMY STALLINGS	757-627-9101	sales@metalconceptsinc.com	United States	Full,RFx,QA,Non-PO,P- Card
2018-11-11 13:58:08.02	No re-cert-3-yr expiration	Expired	GEORGIA PORTABLE BUILDING	3S INC	111256982	847578549	DAVE MORRIS	770-942-6367	david@gaport.com	United States	Full,RFx,QA,Non-PO
2018-11-11 14:33:26:367	No re-cert-3-yr expiration	Expired	WIRE AND CABLE YOUR WAY L	.LC	116803502	030620663	Seth Harris	708-320-8720	seth@wireandcabletogo.com	United States	QA,P-Card
2018-11-11 14:44:15.43	No re-cert-3-yr expiration	Expired	NATIONAL BUSINESS GROUP	ON HEALTH	114912839		UNKNOWN UNKNOWN	202 558 3000	2@2.COM	United States	Non-PO,P-Card
2018-11-11 14:54:38.883	No re-cert-3-yr expiration	Expired	GENERATEURS DE BROUILLAF	RD MDG LTEE, LES	114841928	255273054	Manon Grenier	514-272-6040	info@mdgfog.com	Canada	QA
2018-11-11 14:59:12.01	No re-cert-3-yr expiration	Expired	WESTLAND TECHNOLOGIES, I	NC.	86964	825317134	Tegan Moncrief	2095716407	tmoncrief@westlandtech.com	United States	Full,RFx,QA,Non-PO
2018-11-11 15:56:25:533	No re-cert-3-yr expiration	Expired	PV LABS INC		117742693	253628986	Declan Keogh	905-667-7223	dkeogh@pv-labs.com	Canada	Full,RFx,QA,Non-PO
2018-11-11 16:35:12.787	No re-cert-3-yr expiration	Expired	MODULAR COMFORT SYSTEM	IS, INC.	5217	055272777	STEVE MILLER	315-484-9048	smiller@mcsmms.com	United States	Full,RFx,QA,Non-PO,P- Card

Screenshot 21: Profile Expiration Report

- Clicking **Close** will close out the report, returning the user to the **Reports** page.
- Clicking **Print** will display the standard print command window from which the user can print a copy of the report.
- Clicking **Save** will generate report in the form of a Microsoft Excel spreadsheet. The LM User will also have the ability to save the **Profile Expiration** Report in .CSV format. The LM User will be able to use the standardsave commandwindow to specify a filename and location.