Trading Partner Manager (TPM)
LM Buyer Help Document

Version 3.0

Prepared by Exostar LLC.

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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 search and view all non-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, search and view all sensitive and nonsensitive organization data as well as update certain organization data.

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, search and view all 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 Access Gateway (MAG) Roles

The following roles are supported by Exostar and other designated third parties:

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 can also modify organization information.

Exostar Customer Support - Exostar Customer Support person who can view 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 application owner (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.

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Organization Administrator – Organization Administrator (Org Admin) is the primary contact for the organization's MAG account. The Org Admin is 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 view all sensitive and non-sensitive organization data.
- Update certain organization data for their organization only.
- 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 each application that an organization subscribes. The application administrator (app admin) is responsible for managing the access to the application within their organization by approving/denying a user's application subscription. In approving the user's request, the application administrator (on behalf of their organization) assumes financial responsibility for the user's seat in that application.

User – A person with an active MAG account, whose employing organization is 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 (can be used for all activities). Allows an organization to 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 only and inspection 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 not able 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).

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PCard	-	Vendor with whom PCard purchases are made. These account types are created manually by LM users.
Unsolicited	-	This is a pseudo profile type. 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 **Send to 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 LM Buyer Mgr** buttons become active when all required fields have been provided in all sections.

Clicking **Cancel Request** in the global navigation 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 not always be the TPM Home page). They can then access the request 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.

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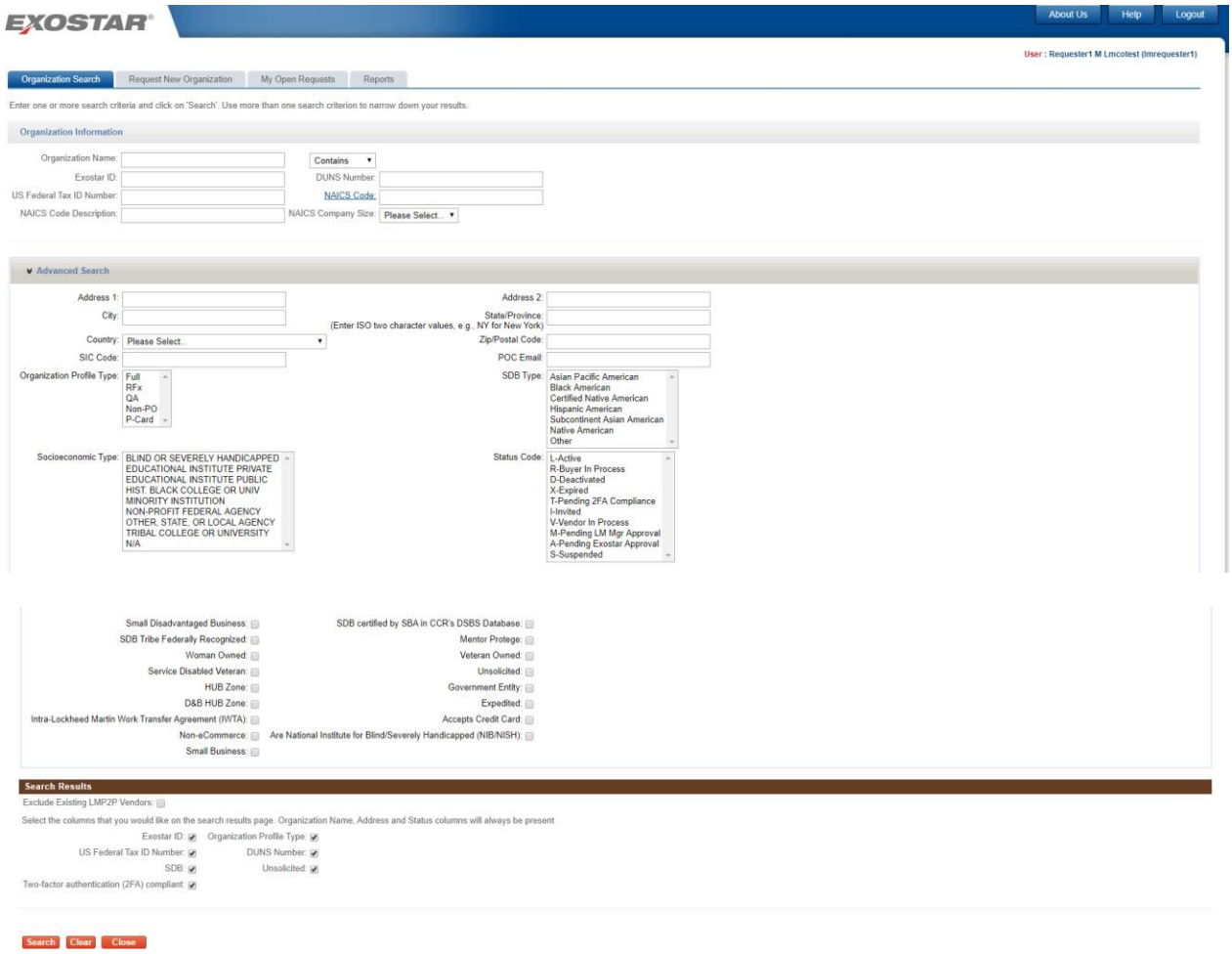
3 PERFORM ORGANIZATION SEARCH

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 andclick **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 searchcriteria.



Screenshot 1: Organization Search Page

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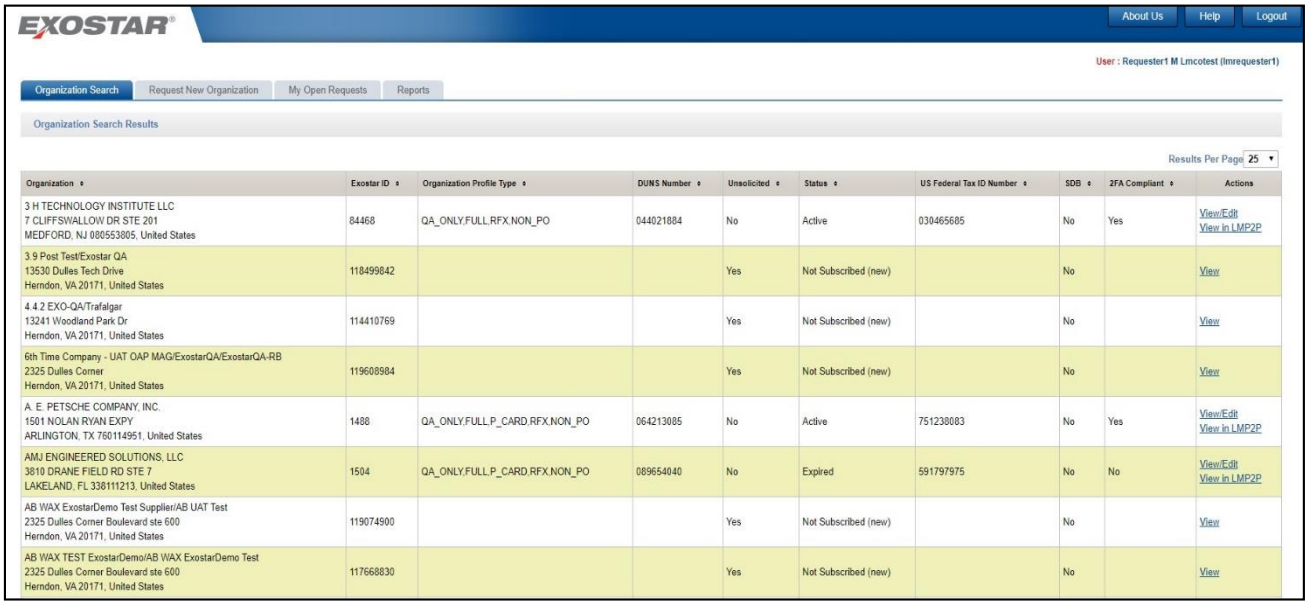
NOTES:

- 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 organization name AND are located in Virginia.
- The **Search Results** page can be customized to display certain 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 any that have been submitted, but have not yet been approved by the EPA.

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



Organization	Exostar ID	Organization Profile Type	DUNS Number	Unsolicited	Status	US Federal Tax ID Number	SDB	2FA Compliant	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	View/Edit View in LMP2P
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 Dulles 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.
- Click on **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.

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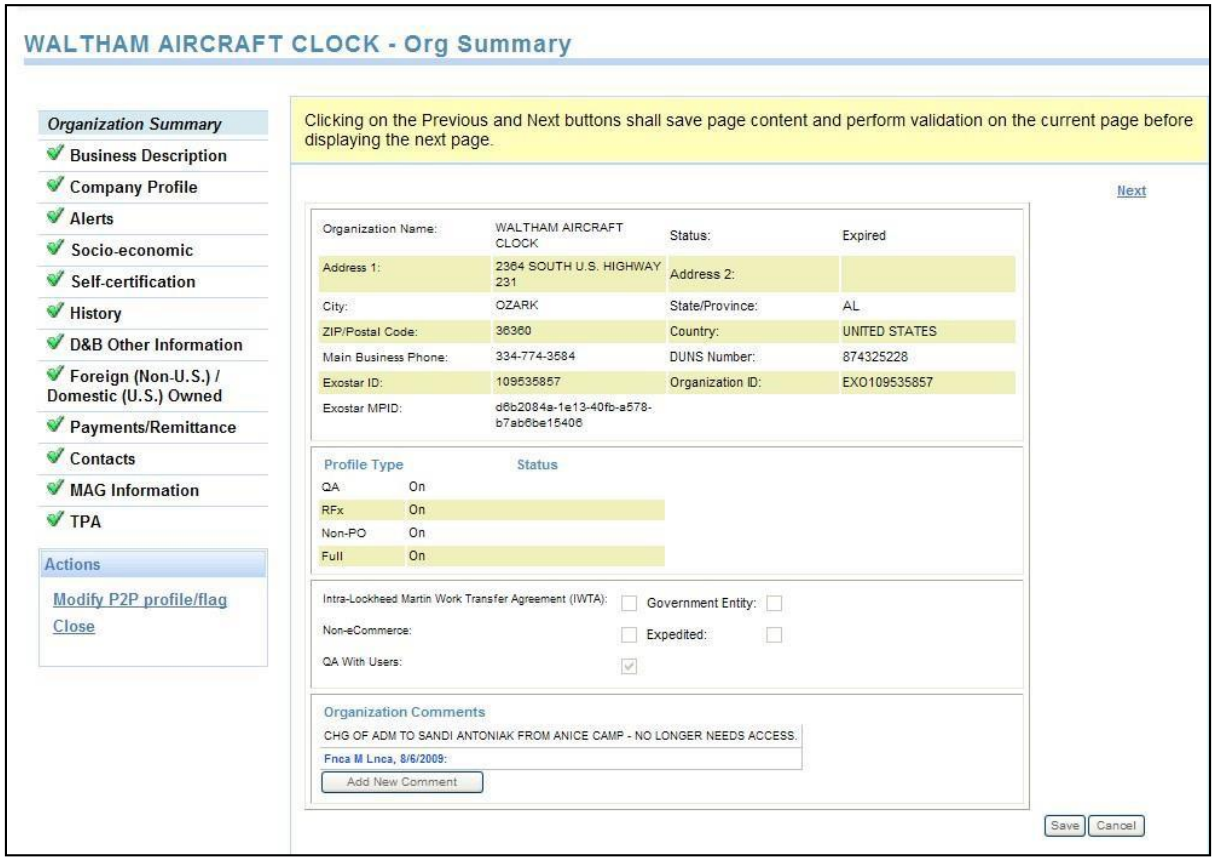

Screenshot 3: **Organization Summary Page in TPM**

To update:

- Click on any header 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 will prompt 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.

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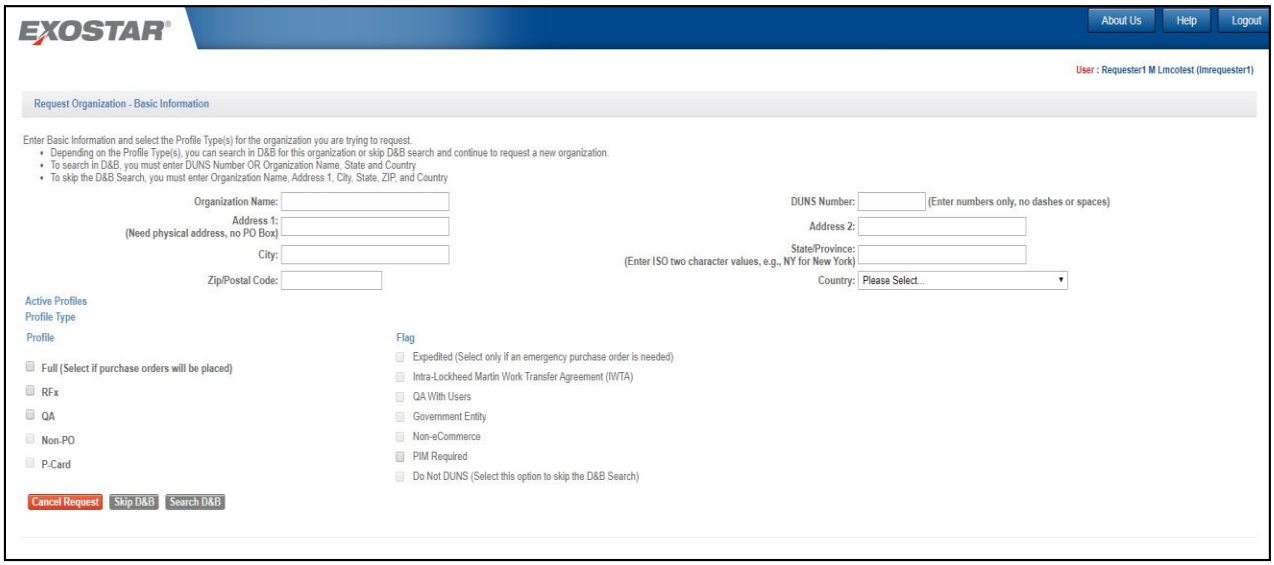
4 REQUEST NEW ORGANIZATION

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 **Request New 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.



Screenshot 4: Request New Organization – Basic Information

<u>IMPORTANT:</u> The following rules govern the selection of flags:

- Upon page load all the flag checkboxes are disabled.
- Only the Corporate Admin will be able to mark a 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 **PIM Required** 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.

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- 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 only be flagged as one of these at a time: **IWTA**, **Government Entity** or **Non-eCommerce**. Only the Corporate Admin or the Site Admin will be able to mark a profile/organization as **Government Entity** or **IWTA**.

NOTE: 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 **DUNS Number** 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 will display the **Resolve Duplicates** page before going directly to the **Organization Summary** page.

Clicking **Cancel Request** from the **Basic Information** page will return 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.

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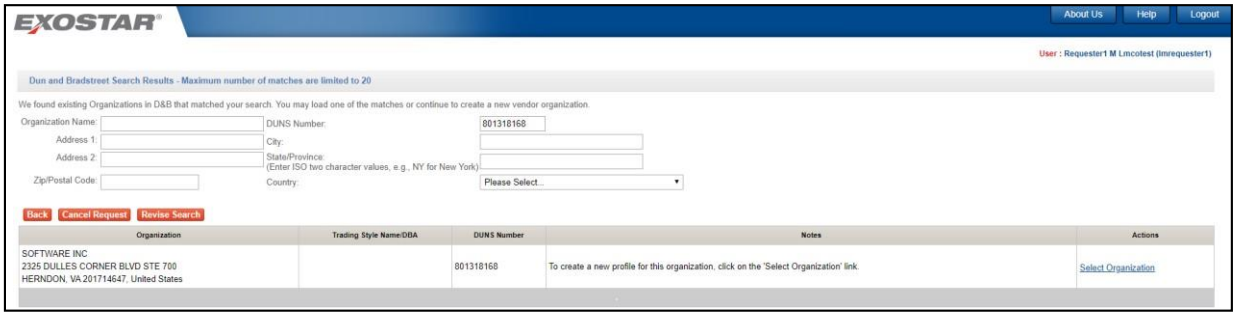
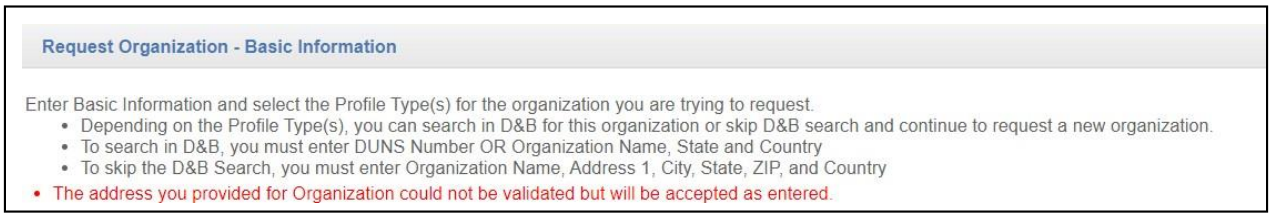


Screenshot 5: Dun and Bradstreet Search Results

- 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 an error message.



Screenshot 6: Organization Match Error Result page

- To perform search again, modify search criteria 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 **Basic Information** 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 will automatically search the TPM to see if the organization already exists. If the system finds any, it will display **<u>the first 20</u>** organizations that meet the threshold on the **Resolve Duplicates** page.

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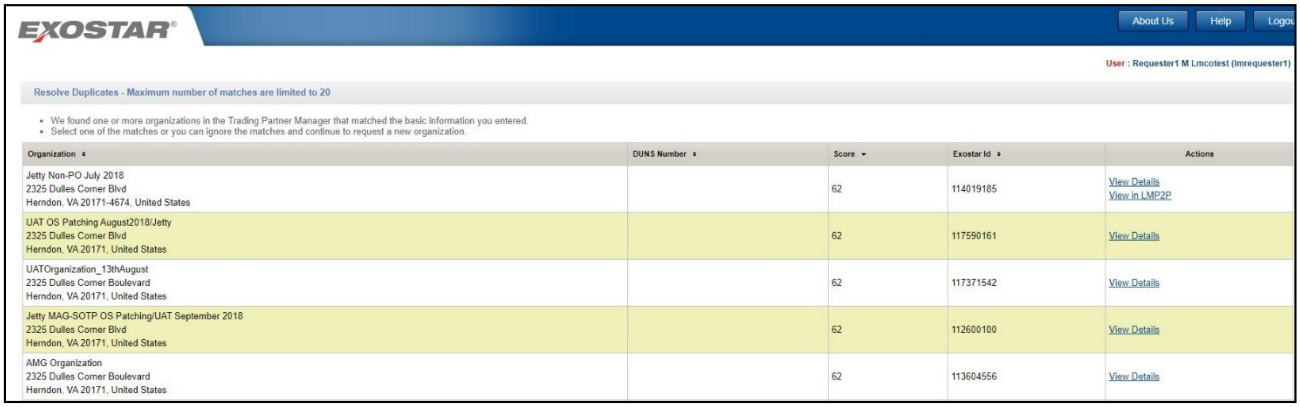
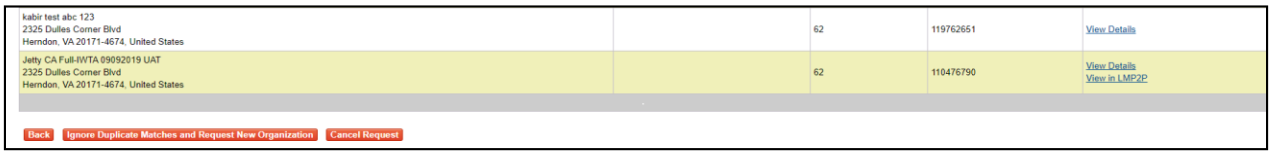


Screenshot 7: **Resolve Duplicates Page**

- 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.



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 assigned role
- The profile type(s) of the organization that is being created.

4.5 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)

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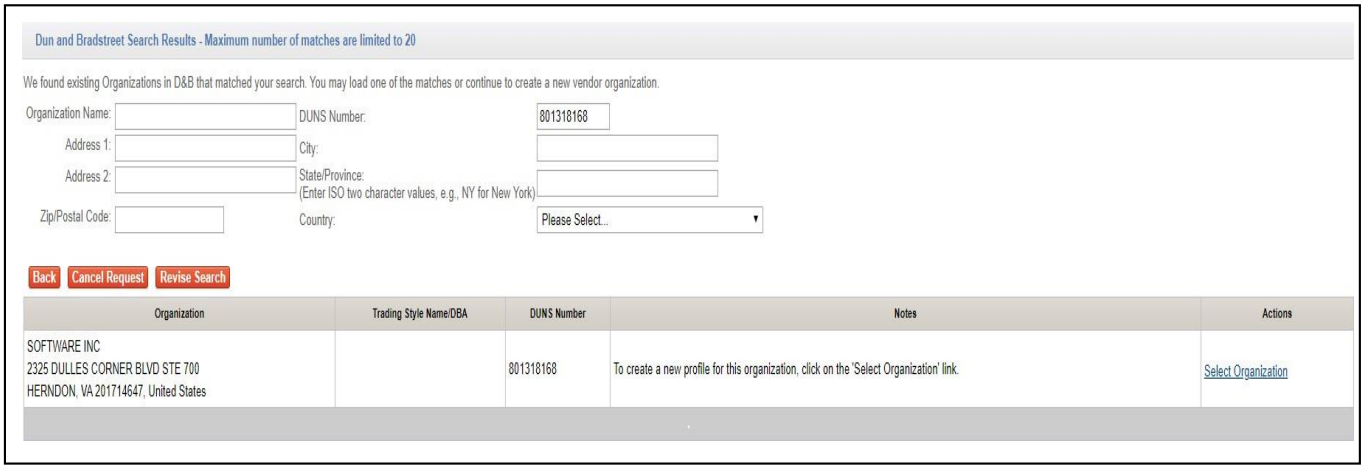
Subsequent sections provide details on invitation process for each profile type.

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 organization record is found in the D&B results list, click the **Select Organization** link, to perform a synchronous lookup of the organization's information against the Dun & Bradstreet registry. This will automatically load (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.



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 band to update that record with D&B.

If the organization's profile type is **Full** and you do not find a matching organization in the **D&B Search** 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 you are 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 display the following invitation page:

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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 incorrect email, Exostar Customer Support is able to access and update the supplier's organization account and re-send the email to the correct email 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 perform a synchronous lookup of the organization's information against the Dun & Bradstreet registry and will automatically load (**for a fee**) 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 display an 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

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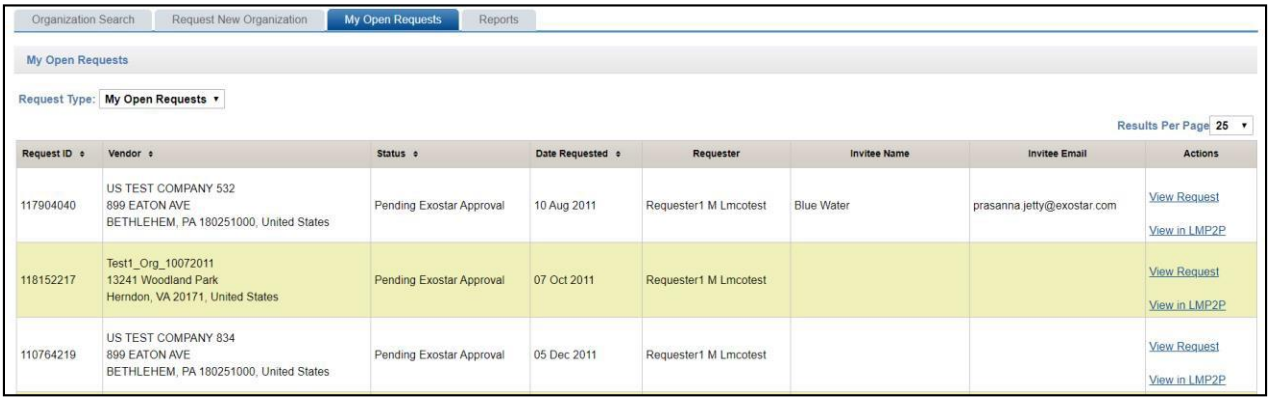
Note: Although the expedite request will be emailed to one specific LM Buyer Approver, it could technically be approved by any LM Buyer Approver.

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 click on the link in the email to be federated into TPM to the request. They can also login to TPM, click on **My Open Requests**, and click the **View Request** link in one of the requests in the queue.



Screenshot 11: My Open Requests page

Click on any header 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.

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Screenshot 12: **LM Buyer Approver Organization Summary Page**

The LM Buyer Approver will be able to **Approve** or **Deny** an expedited request. If denying the request, they will be required to provide **Deny** comments. Click on **Close** to close the request without making changes.

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 will no longer be visible in the LM Buyer Approver's **My Open Request** queue after 30 days.

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

<u>When a request is approved by the LM Buyer Approver:</u>

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**, and it will no 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 email will 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 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 (as opposed to the company contact as mentioned earlier).

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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 will route 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 with users** 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 prompt you 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 batch lookup of the organization's information against the Dun & Bradstreet registry. Based on 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 any users, 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&B results 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.

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Upon entering all required organization profile information, you will be able 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 could take up to 3 weeks or more to complete (not an Exostar system issue).

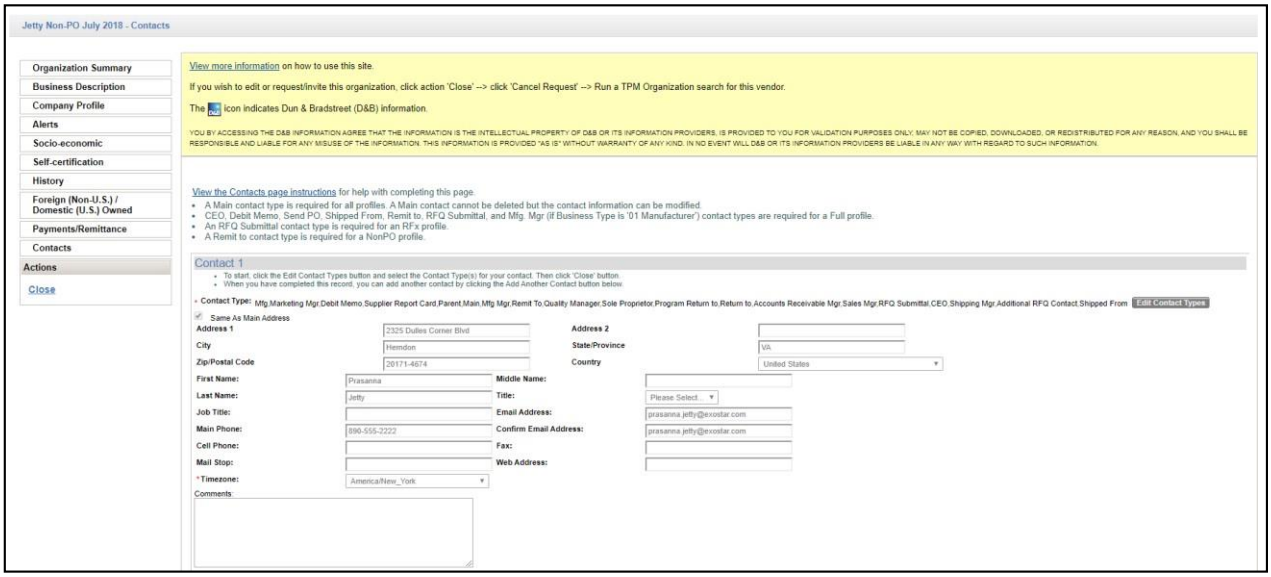
Note: If this is a **Full** flagged as **IWTA**, **Govt Entity**, or **NeC**, the batch lookups will remain synchronous.

The system will create this organization in the TPM with an LMP2P status of **Active** and profile type status set to **ON**. This will be 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 information in the TPM. The TPM will send the organization's information to Lockheed's EMDM for update.

4.6 Contacts

Multiple contacts can be added to or deleted from an organization's record. Click on **Contacts** to display the contact information screen.



Screenshot 13: Contacts page

Clicking **Edit Contact Type** on the **Contacts** page will present 2 (two) pick lists: one with all the contact types 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 can have any number of contacts for each contact type except **Main** and **Remit To**. An organization can only have 1 **Main** contact and 1 **Remit To** contact. An organization must have a **Main** contact.

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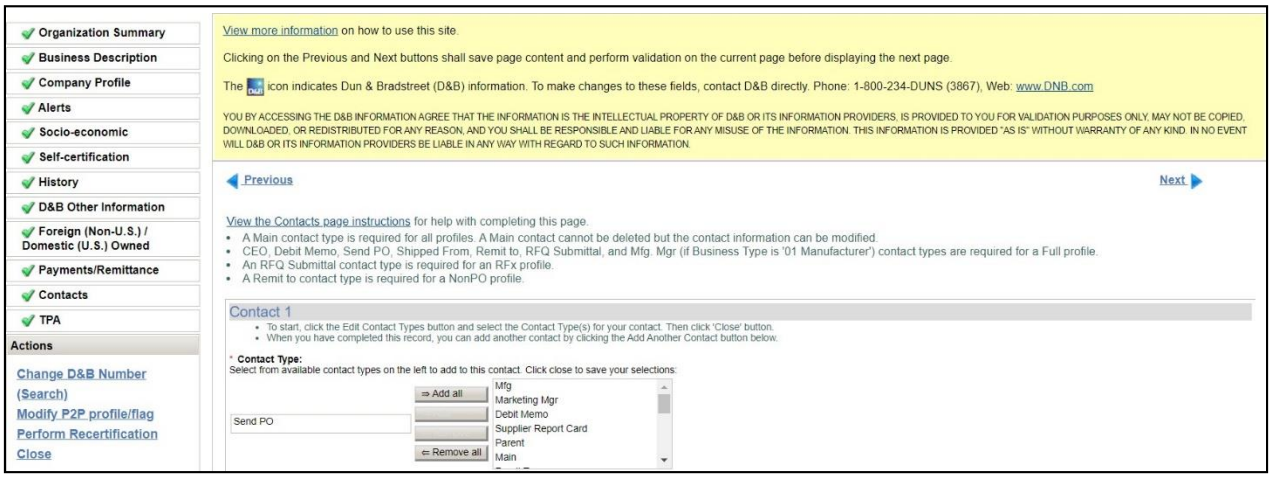

Screenshot 14: **Edit Contact Type**

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 with values 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 (in addition to a Main contact).
A **Send PO** contact is not allowed when creating a pure partial profile, e.g. a pure **NonPO** and/or **QA** (with or without users) and/or **PCard** and/or **RFx** only profiles. The user will not be able to specify a **Send PO** contact if the profile is just one 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 also not be added to the same contact record. They **must** be entered on 2 separate contact records even if they are the same contact person.

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You will be able to link (or unlink) a TPM person to 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: A TPM person may be 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 can perform 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 validation service can only be performed on the **Main Organization**, **Remit To** contact and **Send PO** 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 next screen, 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 **Send PO** and **Remit To** addresses as **Org address** is not editable 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 you enter/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:

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- **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<#> (<Contact FN><Contact LN>): Address was successfully matched to the US Postal Service database and may have been updated. Please inspect before proceeding."
- **Canada:** " Contact<#> (<Contact FN><Contact LN>): 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 read something like the following:

For Organizations:

- "The address you provided for <Organization> could not be validated. Please correct the address before proceeding."
- "<Organization>: Could not 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><Contact LN>) could not 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<#> (<Contact FN><Contact LN>): 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 display some 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<#>(<Contact FN><Contact LN>) could not 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:

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- 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 addressesthat are already inTPM.
- No validation of address data will be done for unsolicited profiles.
- Org address cannotbe validated during 'Add profile' becauseThe fields inthe 'CoreInformation' page are in-editable. As such, the onlytime that unsolicited and existingTPM 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 notbe flagged.
- This address validation servicewill NOT be performed on the Mailstop field.

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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 each organization 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 can be 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 did not 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.

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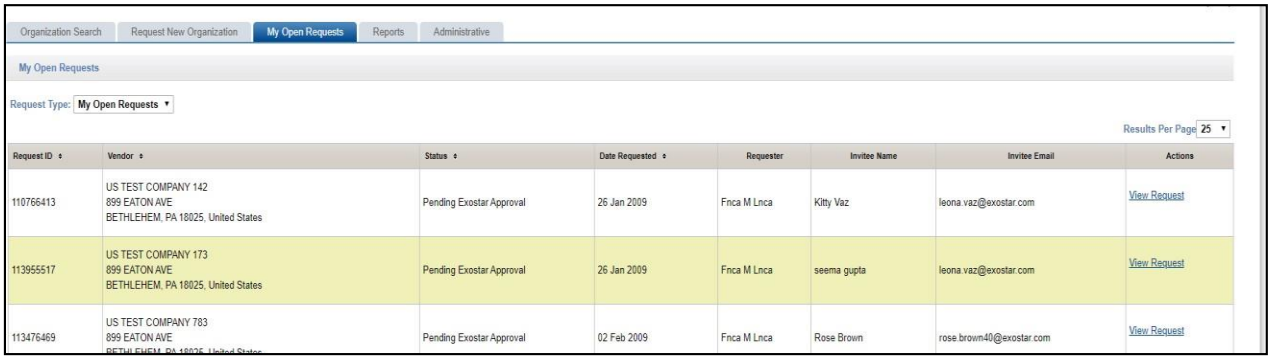

Screenshot 15: **My Open Requests page**

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 an email 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 an email notification is sent to the LM User that created that request.

The number of results that are displayed per page can be changed via a dropdown listbox. 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, click on the page number.

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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 **My Open Requests** view to continue with the request.

View Request – You can view requests that are created and are still 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 you to 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 you created as long as 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 one or 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).

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5.2 All Open Requests

The **All Open 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, click on 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 search criteria 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.

5.3 Approval-Pending Requests

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

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6 ORGANIZATION PROFILE MANAGEMENT

6.1 Profile Update

The LM User and Org Admin roles will be able to modify an LMP2P organization's information in the **Organization Summary** pages. When an 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 an email notification to the Org Admin(s) with a list of the fields that have been modified.

Upon saving the 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, CA or 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 will be in-editable.

Screenshot 17: Modify P2P Profile/Flag

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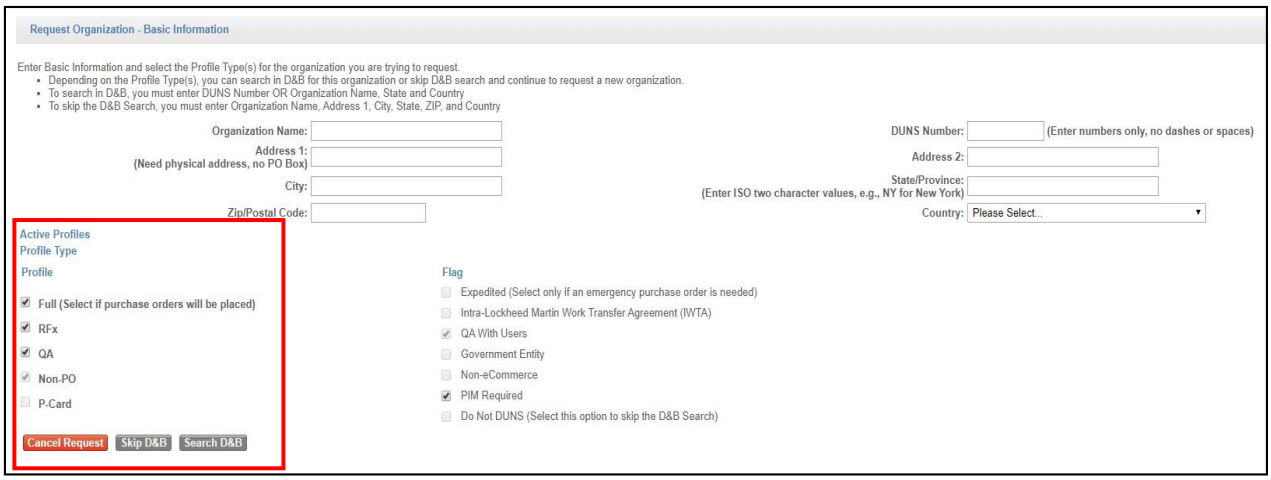
Only a CA will be able to clear the **Non-eCommerce**, **IWTA** and **Government Entity** flags from an organization's profile.

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



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 not having users. This means that the **Non-eCommerce**, **IWTA** and **Government Entity** flags cannot be changed from not being set to 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/ users profile and 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 is going from being LM-managed (e.g. **Full**, **Non-eCommerce** = true) to vendor-managed (e.g. **Full, Non-ecommerce** = false), if the LM user had previously provided values in the self-certification fields, the Org Admin will not be required to do so again. They will however be forced through each screen as during the regular Organization Registration process, and so will have a chance to view/confirm the entries on that screen.

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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 **Government Entity** 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 withusers (i.e. **Full**, **not flagged as IWTA/Non-eCommerce**/**Govt Entity**, **RFx** & Q**A with users**) is created (during the Request New Org 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 wouldduring the initial creationof 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&B Search** 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 willbe read-only mode, 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 an email notification to the POC (same as during Request New Org).

If the organization is already registered in MAG, the system willdisplay the Invitation page same as above, however upon submission of the request, the invitation willautomatically 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.

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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 kick off 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 did not already 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 Org Admins for that organization.

If adding a **QA with users** profile to an **RFx** org, the system will automatically gray out the **QA with users** flag, making it read-only such that the LM User is not able 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 App Admin.

6.5 NonPO/PCard/QA without Users Profile

Adding a **NonPO**, **PCard** or **QA without users** profile to an organization will work the same 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: Organization already 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 an org	Display Org Summary pages
3 – LM User	Click **Add LMP2P profile**	Display Basic Information page

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4 – LM User	Select **Full** (system auto checks all unchecked profiles except PCard if unchecked), Click **Skip D&B**	Display Org Summary pages
5 – LM User	Provide all required info for **Full** profile; LM User is NOT prompted 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	Click link in email	Display Org Summary pages
8 – Org Admin	Fill in all attributes, specify LMP2P App admin -> Accept LM TPA -> Submit request	Update org record in TPM to reflect new 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/QA without 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: Organization is 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 an org	Display Org Summary pages
3 – LM User	Click **Add LMP2P profile**	Display Basic Information page
4 – LM User	Select **Full** (system auto checks all unchecked profiles except PCard if unchecked), Click **Skip D&B**	Display Org Summary pages
5 – LM User	Provide all required info for **Full** profile; LM User is NOT prompted to specify LMP2P App Admin. Click **Invite**	Display Invitation page with POC info pre-filled and option for additional comments

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6 – LM User	Submit invitation	Invitations will go to POC
7 – Org Admin	Click link in email	Display Org Summary pages
8 – Org Admin	Fill in all attributes, specify Org Admin, Company Contact & LMP2P App admin -> Accept Exostar MSA -> Accept LM TPA -> Submit request	Route workflow to EPA
9 – EPA	Approve request	Update org record in TPM to reflect new profile and attributes; Send MAG credentials to Admins
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 2: Add Full profile to NonPO/PCard/QA without users profile

Use Case #3:

Use Case Name: Add **Full** profile to **RFx** or **QA with users profile**
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 an org	Display Org Summary pages
3 – LM User	Click **Add LMP2P profile**	Display Basic Information page
4 – LM User	Select **Full** (system auto checks all unchecked profiles except PCard if unchecked), Click **Skip D&B**	Display Org Summary pages
5 – LM User	Provide all required info for **Full** profile; 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	Click link in email	Display Org Summary pages
8 – Org Admin	Fill in all attributes -> Accept LM TPA -> Submit request	Update org record in TPM to reflect new profile and attributes.
Alternative Path		

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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 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: Organization already 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 an org	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 NOT prompted 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	Click link in email	Display Org Summary pages
8 – Org Admin	Fill in all attributes -> Specify LMP2P App Admin. No Acceptance of LM TPA > Submit request	Update org record in TPM to reflect new profile and attributes; Send MAG credentials to LMP2P App Admin (if new to MAG)
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 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 or 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**

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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 **Full**, Select **IWTA**, **NeC** or **Govt Entity**, Click **Skip D&B**	Display Org Summary pages
5 – LM User	Provide all required info for **Full** profile -> Click **Submit Request**	Update org recordin TPM to reflectnew profile andattributes.
Alternative Path		
4 – LM User	Select **Full**, Select **IWTA**, **NeC** or **Govt Entity**, Click **Search D&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	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 – LMUser	Provide all required info for RFx profile -> Click **Submit Request**	Update org recordin TPM to reflectnew 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

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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 send updated organization record to EMDM:

- Debarment
- Out of 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 alert codes 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.
High Risk: 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=Bankruptcy has been closed, dismissed, discharged, void, or never bankrupt.
Paydex: A numerical score characterizing the payment experiences of a business, Blank.

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

7.2 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.

7.3 Denied Parties List

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

If the organization is an LMP2P subscriber, the EPA will send an email alert of this event.

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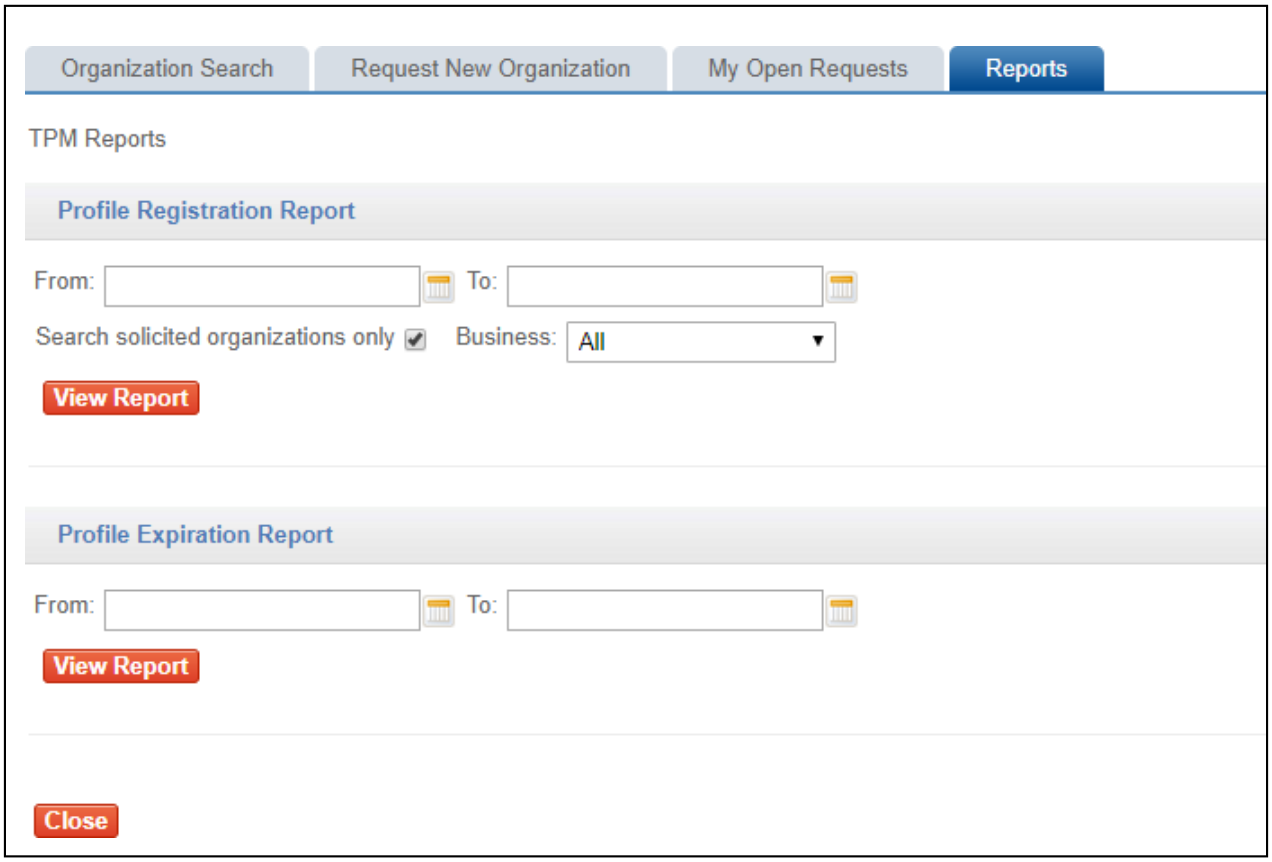
8 REPORTS

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 (Only a CA can generate this report).

Only LM Users with the following roles will have 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.



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 Center within the past calendar month.

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

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In the Profile Registration Report section 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.

Organization Search | Request New Organization | My Open Requests | Reports

Profile Registration Report

Profile Registration Report generated on Mon Nov 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.

Date	Registered	Changed	Deactivated
10/2018	4	1297	0
11/2018	3	1128	2
12/2018	3	1058	0
Year 2018 Totals	**10**	**3483**	**2**
1/2019	6	1372	0
2/2019	3	1319	0
3/2019	7	1670	0
4/2019	8	1330	0
5/2019	5	573	0
6/2019	3	579	0
7/2019	14	600	8
8/2019	10	718	0
9/2019	3	575	0
10/2019	9	647	1
11/2019	1	252	1
Year 2019 Totals	**69**	**9635**	**10**
Grand Totals	**79**	**13118**	**12**

Close | Print | Save

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 standard save command window where the user can specify 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).

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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 range specified 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 Buyer Portal. This will display a **Reports** page.

In the Profile Expiration Report section 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 | Request New Organization | My Open Requests | Reports

Profile Expiration Report

Profile 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	Reason	Status	Organization Name	Exostar ID	DUNS	Contact Name	Contact Phone Number	Contact Email Address	Country	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 GROUP LLC	118477008	067027875	Jack Weaver	6014827966	lmgdiversified@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 CENTRES 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 BUILDINGS 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 LLC	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 BROUILLARD 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, INC.	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 SYSTEMS, 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 standard save command window to specify a filename and location.

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