



# Managed Access Gateway (MAG) Adoption Administrator Guide

April 2025

The Exostar logo, featuring the word 'EXOSTAR' in a bold, sans-serif font with a stylized 'X' and a registered trademark symbol. The logo is centered and overlaid on a background of intersecting red and grey lines that form a large 'X' shape across the page.

**EXOSTAR®**

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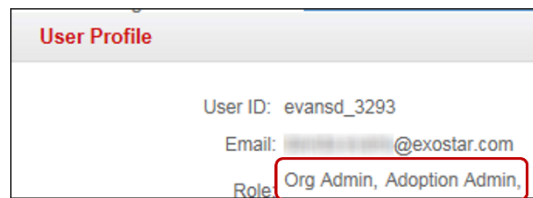
**DOCUMENT VERSIONS**

<b>Version</b>	<b>Impacts</b>	<b>Date</b>
IAM 6.10	<ul style="list-style-type: none"><li>• Adoption Administrators can sponsor OTP credentials via Exostar's Adoption Module</li></ul>	November2018
MAG 6.10	<ul style="list-style-type: none"><li>• Updated description for externalorganization and user IDs.</li><li>• Updated notes in Begin new invitation for New User section.</li></ul>	January 2019
MAG 6.11	<ul style="list-style-type: none"><li>• Updated the product name from IAM to MAG</li><li>• Adoption Administrators can now search for users by User ID (updated screenshot)</li><li>• Included a section on Reporting in MAG, specifically highlighting the Onboarding Status Report</li></ul>	April 2019
MAG 6.14	<ul style="list-style-type: none"><li>• Remove OTP from FTL process</li><li>• Update Password Policy</li></ul>	June 2020
MAG 7.0	<ul style="list-style-type: none"><li>• Self-Registration</li><li>• New Organization Adoption Invitation registration process</li><li>• Dashboard</li><li>• Purchasing</li><li>• Credentialing</li><li>• Activation</li><li>• Authentication</li></ul>	February2021

## OVERVIEW

The Adoption Module allows you to invite external companies, as well as external or internal users to Exostar's Managed Access Gateway (MAG) Platform, and allows you to subscribe the company or user to applications or services.

You MUST have the **Adoption Administrator** role for the applications in which you want to invite users and organizations. Exostar grants the Adoption Administrator role. To confirm you have the Adoption Administrator role, log into your MAG account, and click the **My Account** tab. Under the **User Profile** section, your roles display.



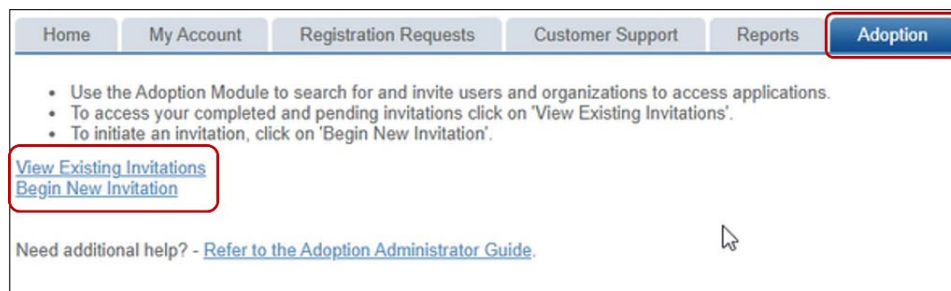
If you do not see the application or service you want to invite a user or company to, work with your Exostar point of contact to request the role of Adoption Administrator for those applications.

## ACCESS

Login to your MAG account, and click the **Adoption** tab. Working within the Adoption tab, you have two options:

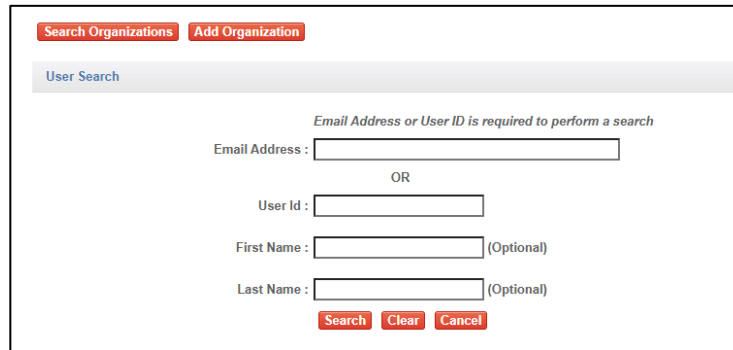
1. **View Existing Invitations** allows you to search for existing invitations or to continue to saved invitations.
2. **Begin New Invitation** allows you to begin a new invitation for a user or organization.

**NOTE:** Both options open the **Adoption Module** in a new browser window.



## BEGIN NEW INVITATION FOR EXISTING USER

1. To invite an existing user to an application, click the **Begin New Invitation** link. Enter the user's complete email address or MAG user ID (if known) and click **Search**.



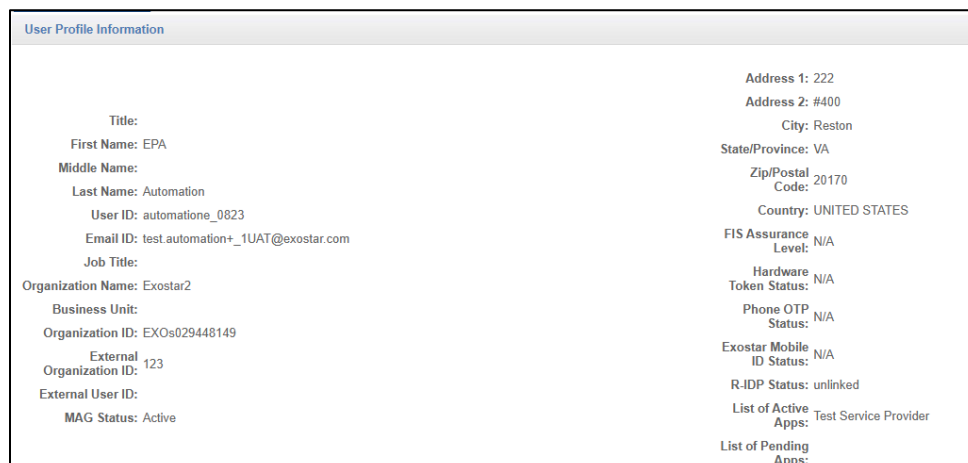
The form is titled "User Search" and contains the following fields and buttons:

- Buttons: Search Organizations, Add Organization
- Header: User Search
- Instruction: Email Address or User ID is required to perform a search
- Field: Email Address : [text input]
- Text: OR
- Field: User Id : [text input]
- Field: First Name : [text input] (Optional)
- Field: Last Name : [text input] (Optional)
- Buttons: Search, Clear, Cancel

2. If the system finds a match, a list of results displays. If the user has multiple MAG profiles, the Adoption Module displays all active and inactive profiles. Select an **Active** account. If no match is found, see the [Begin New Invitation for New User](#) section below.

### Tips:

- If multiple accounts exist with an **Active** MAG account status, scroll to the right to view the **List of Active Apps** column. You may want to select the account subscribed to the most applications AND with an **Active** MAG account status.
  - An inactive or unsubscribed account indicates the user never completed **their account activation**. Select an account by clicking the user's hyperlinked last name.
  - You can sort the columns by clicking the header names. If multiple accounts exist for the user, check the MAG account status column. You may want to reach out to the user to ask what account you should use.
3. Click the **Last Name** link to select a user.
  4. After clicking the user's last name, the **User Profile** displays. Select the applications or services to which you want to invite the user.
    - a. **User Profile Information:** This section includes the user's contact information, organization information, and credential information.



The form is titled "User Profile Information" and displays the following details:

Title:	Address 1: 222
First Name: EPA	Address 2: #400
Middle Name:	City: Reston
Last Name: Automation	State/Province: VA
User ID: automation_0823	Zip/Postal Code: 20170
Email ID: test.automation+_1UAT@exostar.com	Country: UNITED STATES
Job Title:	FIS Assurance Level: N/A
Organization Name: Exostar2	Hardware Token Status: N/A
Business Unit:	Phone OTP Status: N/A
Organization ID: EXOs029448149	Exostar Mobile ID Status: N/A
External Organization ID: 123	R-IDP Status: unlinked
External User ID:	List of Active Apps: Test Service Provider
MAG Status: Active	List of Pending Apps:

- b. **Organization Credential Information:** This section displays credentials to which the organization is subscribed.

Organization Credential Information	
FIS Assurance Level: FIS Medium	R-IDP Status: Linked

- c. **Application Information:** This section displays the status of an organization's access to the listed applications and services. If the status is **Pending Acceptance of Terms & Conditions**, you can invite the user.

Application Information	
Application Name	Status
LM eInvoicing Application	Inactive
Test Service Provider	Active

- d. **Invitation Information:** This section provides a list of applications you can choose to invite the user to. You must have the Adoption Administrator role for the application in order to submit a successful invitation. If a user already has access to an active application, you cannot invite them to the application.

Invitation Information		
Applications:	Application Name	Sponsor Codes
<input type="checkbox"/>	LM eInvoicing Application	
	Phone OTP	<input type="checkbox"/>
	Hardware OTP	<input type="checkbox"/>
	Exostar Mobile ID	<input type="checkbox"/>
	International Phone OTP	<input type="checkbox"/>
	Proofing Required	<input type="checkbox"/>
<p>*External Source Name: <input type="text" value="Please Select..."/> The External Source Name identifies the partner issuing the invitation. It is required in order to enter an External User ID and External Organization ID. <a href="#">Get more information on External Source Names here.</a></p> <p>External User ID: <input type="text"/> External User ID is a unique identifier used by your organization for this user.</p> <p>External Organization ID: <input type="text" value="123"/> External Organization ID is a unique identifier used by your organization for this user.</p> <p>External Organization ID, External User ID, and Sponsor Code are all optional fields. For help with these fields, <a href="#">view more information.</a></p> <p>Message to User (to be included in email notification): <input type="text"/></p> <p>I am inviting on behalf of: <input type="checkbox"/></p> <p><input type="button" value="Next"/> <input type="button" value="Cancel"/></p>		

5. Once you select the application, you can choose to assign the user as the **Application Administrator** for the selected application. If the organization is not already subscribed to the application, the system automatically selects the checkbox and cannot be modified.

**NOTE:** The **Sponsor Code** field is not required.

6. Complete the remainder of the invitation. If your organization is setup to sponsor credentials for users, please reference the [Sponsoring Credential](#) section of this document.
- Phone Based OTP:** If the user requires a Phone Based OTP, check this box.
  - Hardware OTP:** If the user requires an OTP Hardware Token, check this box.
  - Exostar Mobile ID:** If the user requires Exostar Mobile ID, check this box.
  - International Phone OTP:** If the user is located internationally and requires Phone OTP, check this box.

- e. **Proofing Required:** If the user requires Identity Proofing or the Identity Proofing Upgrade, check this box.

**NOTE:** You cannot select the checkbox for OTP Hardware Token or Proofing Required if FIS or Phone Based OTP is checked. If FIS or OTP Hardware Token is selected, you cannot select the check box for Phone Based OTP.

- f. **External Source Name:** This field should default, however, if you have the option to select from the drop-down menu, choose your company name.
- g. **External User ID:** This field is optional, and must be unique for the user (such as a partner or vendor user ID), however, if the user was previously invited for another application from your organization, this field pre-populates and is read-only.
- h. **External Organization ID:** This field is optional, and must be unique for the company (such as a partner or vendor company ID), however, if this information was already entered once for the company, it will pre-populate and is read-only. If you have a partner or vendor ID for the organization, you will enter it in this field.
- i. **Message to User:** This field is optional; allows you to enter up to a 500 character personalized message to include in the invitation email sent to the user.
- j. **I am inviting on behalf of:** This option allows you to specify an alternate contact in the notification emails sent to the user. If you select this option, you are required to specify the information shown below. This information is included in the email notification. If I am inviting on behalf of option is not selected, this information defaults to the Adoption Administrator's information issuing the invitation.

7. Click **Next** to continue. The **Invitation Information** page displays. Click **Submit**.

Invitation Information	
Full Name : Ashleigh Howell	
Email Address: ashleigh@exostar.com	
Organization Name: Exostar LLC	
Organization ID: exostar	
OTP Hardware Token Required : NO	
Message to User :	
Subscribe User to Application	Assign Application Administrator Role to User
Supply Chain Platform - Boeing 787 SCMP	No
Click 'Submit' to issue the invitation for the application(s) listed.	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

**NOTE:** If you receive a page prior to this, titled **Organization Subscriptions**, click **Save**, and the **Invitation Information** page displays. Once you successfully submit the invitation, a confirmation page displays.

As the Adoption Administrator, you receive a notification once the user completes their invitation. If you selected the requirement for an **OTP Hardware Token**, **Proofing Required**, **Exostar Mobile ID** or **Phone Based OTP**, the user receives a notification to purchase the credential. The company's **Organization Administrator** also receives a notification alerting them the user is subscribed to an application.

## EXISTING ORGANIZATION – NO ORG ADMIN

If you there is an Existing Organization (shell organization), however no Organization Administrator is assigned, the next new user the Adoption Administrator adds will automatically be assigned the role of Organization Administrator. You will also see screen display prompting you about this change before you complete the new user invitation.

ExostarTest10 - Org Summary

Organization Summary

MAG Information

Actions

[Invite Organization](#)

[invite new user](#)

[Close](#)

Organization Name:

Address 2:

State/Province:

Country:

Other DUNS Number:

Organization ID:

**Inviting User to Shell Org**

You are inviting the user to an org that has no admin. If you proceed with this invitation, user will be assigned the Org admin role. Do you want to proceed?

## BEGIN NEW INVITATION FOR NEW USER

1. If you are unable to locate the user after searching their email address or User ID, click **Search Organizations** to see if the user's organization exists.
2. Enter any company details and click **Search**.

Organization Search

Organization Name:

DUNS Number:

Address 1:

City:

Country:

External Source Name:

Exostar ID:

US Federal Tax ID Number:

Address 2:

State/Province:

Zip/Postal Code:

External Organization ID:

Please review the search results carefully.

In an effort to avoid duplication, you should only proceed with creating a new organization if you are certain that the organization does not already exist.

Results per page:

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RIDP Status	List of Active Apps	List of Pending Apps
<a href="#">samtest22</a> hendson City, New York 23334, UNITED STATES	EXO118248728	118248728		Active	N/A	N/A		Test Service Provider,LM elnvoicing Application

3. The system lists all possible matches. Click the **Org Name** for the company to which you want to invite the user.

### NOTES:

- You can sort columns to review the results by clicking the icon located next to each column header, to avoid creating duplicate organization accounts.
- If the status of the organization's Exostar account is **Unsubscribed**, you have to invite the



organization. Please refer to the [Organization Not Subscribed](#) section in this guide for details.

- If the organization is not listed, or there are no matches, please refer to the [Begin New Invitation for New Organization and User](#) section in this guide.
4. The **Organization Summary** page displays. Under the **Actions** section, click **Invite New User**.

Organization Summary

MAG Information

Actions

- [Invite Organization](#)
- [Invite new user](#)
- [Close](#)

• To issue an invitation to a new user in this organization, click the 'Invite New User' link under Actions to the left.  
 • To return to the Organization Search Results, click the 'Close' link under Actions.  
 • Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name:	samtest 22	Address 1:	hendon
Address 2:		City:	City
State/Province:	New York	ZIP/Postal Code:	23334
Country:	UNITED STATES	DUNS Number:	
Other DUNS Number:		Exostar ID:	118248728
Organization ID:	EXO118248728	Exostar MPID:	eb7b77e5-01e7-4f4f-8593-cbad04e39f13

**NOTE:** If subscribing the user to Partner Information Manager (PIM) or need to include a partner or vendor ID for the organization, click **Invite Organization**, then click **Edit Organization Subscription**. You will be able to select application(s) and enter the **External Organization ID**. After saving, you can **Add User**.

5. On the **User Profile Information** page, enter the user's information. Please note the required fields (marked with an asterisk\*) must be provided or you receive an error when attempting to submit the invitation.

User Profile information

Title:

\*First Name:

Middle Name:

\*Last Name:

\*Email Address:

\*Confirm Email Address:

Job Title:

\*Phone:

Fax:

\*Address 1:

Address 2:

\*City:

\*State/Province:

Zip/Postal Code:

\*Country:

Timezone:

Invitation Information

6. Under the **Invitation Information** section, you must do the following:
- Select the application you want to invite the user to. If you would like to designate the user as an **Application Administrator** for the application, check the box provided.

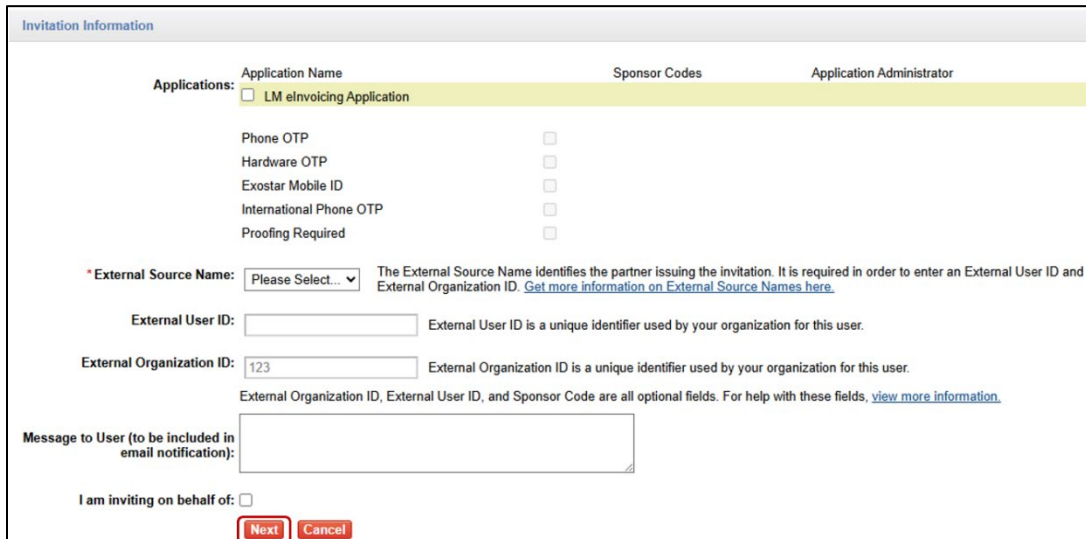
#### NOTES:

- In order to invite the user to a specific application, you must have the Adoption Administrator role for the application.
- If subscribing the organization to a new application, the invited user is assigned the role of Application Administrator (by default) for the subscribed application.
- If the organization is not already subscribed to the application, the Application Administrator checkbox is automatically selected, and you cannot modify.
- If your organization is subscribed to sponsoring credentials for users, please reference the Sponsoring Credential section of this document.

- a. **Phone Based OTP:** If the user requires a Phone Based OTP, check this box.
- b. **Hardware OTP:** If the user requires an OTP Hardware Token, check this box.
- c. **Exostar Mobile ID Required:** If the user requires Exostar Mobile ID, check this box.
- d. **International Phone OTP:** If the user is located internationally and requires Phone OTP, check this box.
- e. **Proofing Required:** If the user requires Identity Proofing or the Identity Proofing Upgrade, check this box.

**NOTE:** You cannot select the checkbox for *OTP Hardware Token* or *Proofing Upgrade Required* if *FIS* or *Phone Based OTP* is selected. If *FIS* or *OTP Hardware Token* is selected, you cannot select the check box for *Phone Based OTP*.

- f. **External Source Name:** This field should default, however, if you have the option to select from the drop-down menu, choose your company name.
- g. **External User ID:** This field is optional, and must be unique for the user, however, if the user was previously invited for another application from your organization, this field pre-populates and is read-only.
- h. **External ID:** This field is optional, and must be unique for the company, however, if this information was already entered once for the company, it pre-populates and is read-only.
- i. **Message to User:** This field is optional; allows you to enter up to a 500 character personalized message to include in the invitation email sent to the user.
- j. **I am inviting on behalf of:** This field is optional; allows you to specify an alternate contact in the notification emails sent to the user. If you check this box, you are required to specify the information shown below.



7. When you are ready to proceed, click **Next**. The **Invitation Information** page displays. Click **Submit**.

Invitation Information

Full Name : Ashleigh Howell

Email Address: ashleigh@exostar.com

Organization Name: Exostar LLC

Organization ID: exostar

OTP Hardware Token Required : NO

Message to User :

Subscribe User to Application	Assign Application Administrator Role to User	Subscribe Organization to Application
Supply Chain Platform - Boeing 787 SCMP	No	No

Click 'Submit' to issue the invitation for the application(s) listed.

Submit

Cancel

The invitation is successfully issued, and the user receives the invitation via email.

As the Adoption Administrator, you receive a notification once the user completes their invitation. If you selected the requirement for an **OTP Hardware Token, Proofing Required, Exostar Mobile ID or Phone Based OTP**, the user receives a notification to purchase the credential. The company’s **Organization Administrator** also receives a notification alerting them the user is subscribed to an application.

BEGIN NEW INVITATION FOR NEW ORGANIZATION AND USER

During your search, if you are unable to find a match for the user or the user’s organization, you need to add a new organization account to start the invitation.

- From the **Organization Search** page, click **Add Organization**.

Organization Search

Organization Name: samtest

DUNS Number:

Address 1:

City:

Country: Please Select...

External Source Name: Please Select

Search

Clear

Cancel

Please review the search results carefully.

In an effort to avoid duplication, you should only proceed with creating a new organization if

Org Name	Org ID	Exostar ID	External ID
samtest 22	EXO118248728	118248728	
hendon			
City, New York 23334, UNITED STATES			

Add Organization

- Enter the company’s information. If the **External Source Name** is not defaulted, select your company from the drop-down menu, and click **Next**.

**Invite Organization - Basic Information**

\* Organization Name:

Business Unit:

DUNS Number:  (Enter numbers only, no dashes or spaces)

Address 1:

\* City:

Zip/Postal Code:

\* External Source Name:  An External Source Name is required in order to enter External Organization ID.

External Organization ID:

Address 2:

\* State/Province:  (Enter ISO two character values, e.g., NY for New York)

Country:

[Next](#) [Cancel](#)

## NOTES:

- Asterisks indicate required fields. If you are entering the DUNS number, you are required to enter all nine numbers.
- Clicking **Next** allows the system to complete another duplicate search. If no duplicates are found, please proceed to **Step 3**. If any duplicates are found, review the information and click **Ignore Duplicate Matches and Request New Organization**, if you still want to proceed to **Step 3**.

• The system has found a potential duplicate for the organization you wish to create.  
 • Please review the list of duplicates carefully.  
 • In an effort to avoid duplication, you should only proceed with creating a new organization if you are certain that the organization does not already exist.  
 • Need additional help? - Refer to the [Adoption Administrator Guide](#)

[Back](#) [Ignore Duplicate Matches and Request New Organization](#) [Cancel Request](#)

Resolve Duplicates - Maximum number of matches are limited to 20

- The **Organization Summary** page displays. The **Actions** section provides the following options:

**samtest 22 - Org Summary**

[Organization Summary](#)  
[MAG Information](#)

**Actions**

[Edit Organization](#)  
[Subscriptions](#)  
[List Users](#)  
[Add User](#)  
[Cancel Invitation](#)  
[Save and Resume Later](#)

• Use the links to the left under Actions to add a user to the organization, cancel the invitation, or save and resume the invitation at a later time.  
 • At least one user is required to submit the invitation. A Submit link will appear in the Actions to the left once a user is added.  
 • Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name:	samtest 22	Address 1:	hendon
Address 2:		City:	
State/Province:	New York	ZIP/Postal Code:	23334
Country:	UNITED STATES	DUNS Number:	
Other DUNS Number:		Exostar ID:	118248728
Organization ID:	EXO118248728	Exostar MPID:	eb7b77e5-01e7-4f4f-8593-cbad04e39f13

[Next](#) [Next](#)

**NOTE:** Clicking **Next**, hyperlinked in blue, allows you to see additional organizational details.

- Edit Organization Subscriptions:** Allows you to invite the organization to applications or services. You have the option to designate a Point of Contact (POC), whom the invitation is sent to. From Edit Organization Subscriptions, you can enter the partner or vendor ID in the External Organization ID field. If subscribing the organization to PIM you will need to create the partner relationship from this section. After you complete this section, click **Add User** to create user.
- List Users:** Displays a list of invited users. You can add additional users, and if you do not need to add additional users, click **Return to Organization Details**.
- Add User:** Allows you to invite a user to applications or services. Since you are creating a

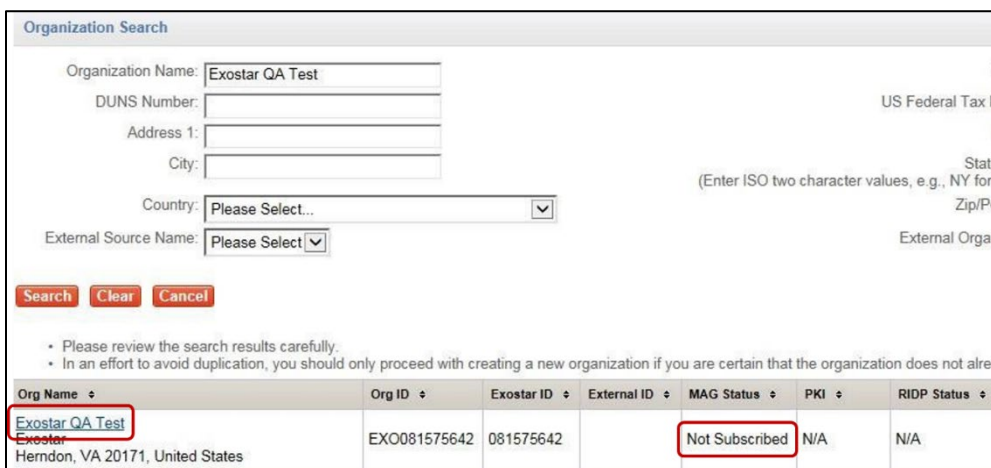
new organization, the first added user is automatically designated as the primary contact. Enter the user's information, complete the invitation information for the user, and click **Save**. Please note you can enter the user's partner or vendor ID in the External User ID field.

- d. **Cancel Invitation:** Allows you to cancel the invite. Your invitation does not save if you select **Yes**.
- e. **Save and Resume Later:** Allows you to save an invitation and complete it at a later time.
- After you add users, submit the invitation from the **Actions** section by clicking **Submit Invitation**.

**NOTE:** The **Submit Invitation** option from the **Actions** menu is NOT available until you add a user. A notification page displays alerting you the invitation was sent and the user account was created. The **Primary Contact** receives the email invitation prompting them to accept.

## ORGANIZATION NOT SUBSCRIBED

1. If you find the company, but it has the status **Not Subscribed**, click the **Org Name**.



Organization Search

Organization Name:

DUNS Number:

Address 1:

City:

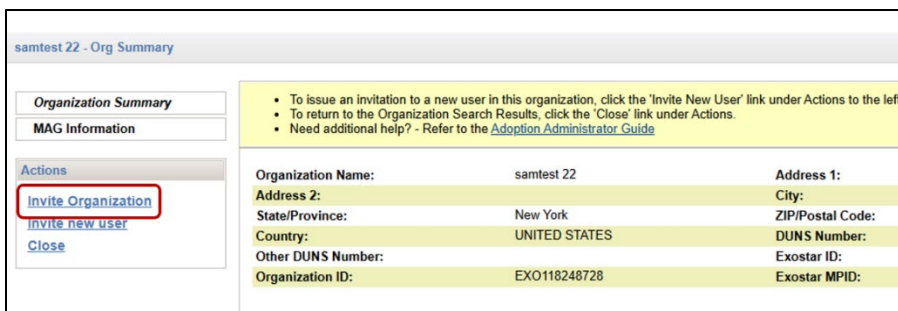
Country:

External Source Name:

• Please review the search results carefully.  
• In an effort to avoid duplication, you should only proceed with creating a new organization if you are certain that the organization does not already exist.

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RIDP Status
<b>Exostar QA Test</b> Exostar Herndon, VA 20171, United States	EXO081575642	081575642		<b>Not Subscribed</b>	N/A	N/A

2. Click the **Invite Organization** link under the **Actions** section.



samtest 22 - Org Summary

**Organization Summary**

**MAG Information**

**Actions**

**Invite Organization**

[invite new user](#)

[Close](#)

• To issue an invitation to a new user in this organization, click the 'Invite New User' link under Actions to the left.  
• To return to the Organization Search Results, click the 'Close' link under Actions.  
• Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name:	samtest 22	Address 1:
Address 2:		City:
State/Province:	New York	ZIP/Postal Code:
Country:	UNITED STATES	DUNS Number:
Other DUNS Number:		Exostar ID:
Organization ID:	EXO118248728	Exostar MPID:

3. Select the organization name from the **External Source** drop-down menu. Click **Next**.

**Invite Organization - Basic Information**

\* Organization Name: Exostar QA Test

Business Unit:

DUNS Number:

Address 1: Exostar

\* City: Herndon (Enter ISO two ch

Zip/Postal Code: 20171

\* External Source Name: Exostar LLC

An External Source Name is required in order to enter External Organization ID.

External Organization ID:

**Next** **Cancel**

- The Adoption Module presents the option to add application subscriptions for the organization, as well as add users. Once you add users, submit the invitation by clicking the **Submit Invitation** link under the **Actions** section.

**Exostar QA Test - Org Summary**

Organization Summary

MAG Information

**Actions**

[Edit Organization](#)

[Subscriptions](#)

[List Users](#)

[Add User](#)

**[Submit Invitation](#)**

[Cancel Invitation](#)

[Save and Resume Later](#)

• Use the links to the left under Actions to add a user to the organization, cancel the invitation, or s

• At least one user is required to submit the invitation. A Submit link will appear in the Actions to th

• Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name:	Exostar QA Test	Address 1:
Address 2:		City:
State/Province:	VA	ZIP/Postal Code:
Country:	United States	DUNS Number:
Other DUNS Number:		Exostar ID:
Organization ID:	EX0081575642	Exostar MPID:

## SUBSCRIBE ORGANIZATION TO APPLICATION WITHOUT INVITING USER

The Adoption Module allows you to invite an organization to applications without defining a specific user. This is valuable for some applications where a user with a specific role within the supplier company needs access, but you are unsure who that person is.

- Click **Begin New Invitation**, and then click **Search Organizations**.

**Search Organizations** **Add Organization**

User Search

Email Address or User ID is required to perform a search

Email Address :

OR

User Id :

First Name : (Optional)

Last Name : (Optional)

**Search** **Clear** **Cancel**

- Enter the company details and click **Search**. You can search by the supplier's company name, as well as other information such as address, DUNS Number, Exostar ID, or US Federal Tax ID Number.



- The system lists all possible matches. Click the **Org Name** for the company you want to invite the user to.

**Organization Search**

Organization Name:   
 DUNS Number:   
 Address 1:   
 City:   
 Country:   
 External Source Name:

Exostar ID:   
 US Federal Tax ID Number:   
 Address 2:   
 State/Province:   
 Zip/Postal Code:   
 External Organization ID:

Please review the search results carefully.  
 In an effort to avoid duplication, you should only proceed with creating a new organization if you are certain that the organization does not already exist.

Results per page:

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RIDP Status	List of Active Apps	List of Pending Apps
<b>samtest 22</b> London City, New York 23334, UNITED STATES	EXO118248728	118248728		Active	N/A	N/A		Test Service Provider, LM invoicing Application

#### NOTES:

- You can sort columns to review the results by clicking the icon located next to each column header.
- If the status of the organization's Exostar MAG account is **Unsubscribed**, you will have to invite the organization. Please refer to the [Organization Not Subscribed](#) section in this guide for details.
- If the organization is not listed or there are no matches, please refer to the [Begin New Invitation for New Organization and User](#) section in this guide.

- Click **Invite Organization** in the **Actions** section.

**samtest 22 - Org Summary**

**Organization Summary**

**MAG Information**

**Actions**

- To issue an invitation to a new user in this organization, click the 'Invite New User' link under Actions to the left.
- To return to the Organization Search Results, click the 'Close' link under Actions.
- Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name: samtest 22  
 Address 1:   
 Address 2:   
 City:   
 State/Province: New York  
 ZIP/Postal Code:   
 Country: UNITED STATES  
 DUNS Number:   
 Other DUNS Number:   
 Exostar ID: EXO118248728  
 Exostar MPID:   
 Organization ID: EXO118248728

- Click **Edit Organization Subscriptions**. The Adoption Module displays a list of applications and services you can invite the organization to access. You also have the ability to unsubscribe a company from previously selected applications and services.

If you want to select an application, select the checkbox. To unsubscribe a previously selected application and service, you need to deselect the box.

**Organization Subscriptions**

☒ ExoConnect  
☐ ExoConnect 2  
☒ Exostar Secure File Transfer

- The **External Source Name** should default, however if you do have the option to select from the



drop-down menu, select your company name. The **External Org ID** and **Inviting on behalf of** fields are optional. Click **Next** when you are done.

\* External Source Name: 

Please Select...

The External Source Name identifies the partner issuing the invitation. It is required in order to enter an External User ID and External Organization ID. [Get more information on External Source Names here.](#)

External User ID:

External User ID is a unique identifier used by your organization for this user.

External Organization ID:

External Organization ID is a unique identifier used by your organization for this user.

External Organization ID, External User ID, and Sponsor Code are all optional fields. For help with these fields, [view more information.](#)

Message to User (to be included in email notification):

I am inviting on behalf of: ☐

Next

Cancel

7. On the **Organization Summary** page, click **Submit Invitation** under the **Actions** section.

Exostar QA Test - Org Summary

Organization Summary

MAG Information

Actions

Edit Organization

Subscriptions

List Users

Add User

Submit Invitation

Cancel Invitation

Save and Resume Later

• Use the links to the left under Actions to add a user to the organization, cancel the invitation, or save and resume the invitation at a later date.

• At least one user is required to submit the invitation. A Submit link will appear in the Actions to the left once a user is added.

• Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name: Exostar QA Test

Address 1: Exostar

Address 2:

City: Herndon

State/Province: VA

ZIP/Postal Code: 20171

Country: United States

DUNS Number:

Other DUNS Number:

Exostar ID: 081575642

Organization ID: EXO081575642

Exostar MPID: a119b4ae-e0ac-4a038a12810177b

8. A notification page displays alerting you the invitation sent successfully.

Back Delete Invitation

Organization Summary

Organization Name: magdraHkEHZAMCe

Address 1: 3389 LuiSuX street

City: Dallas

Zip/Postal Code: 98961

DUNS Number:

External Source Name: Exostar LLC

Organization ID: EXO115893860

Address 2:

State/Province: TX

Country: UNITED STATES

MAG Status: Invited

External Organization ID:

Invitation Status

Invitation Status: Invited

Date Submitted: 06 Mar, 2025 05:04 AM EST

Date Completed:

Adoption Administrator: EPA Automation

Organization Application Details

Application Name

Status

Notes

Test Service Provider

Invited

User Details

Email Address

Application Name

Primary Contact

Action

wamga8@qfngslvj.maillosaur.net

• Test Service Provider

☒

[View Details](#)

The system assigns the **Application Administrator** role for the application you invited the company to access, and assigns the **Organization Administrator** role to the first user who most recently logged into Exostar’s MAG account. The Application Administrator is responsible for approving or denying requests to the application for the company, and they also have the ability to accept the **Terms & Conditions** for the application they are an Application Administrator for.



## SPONSORING CREDENTIALS

A company must be set up by Exostar to be able to sponsor One Time Password credentials (OTP) for partners. Please reach out to Exostar to set up your account. All of the below pre-requisites must be met before you can start sponsoring credentials:

- A contractual agreement with Exostar is required to set an organization up as a sponsored organization.
- Sponsored organizations may be configured to set up expiration periods for users to register credentials (e.g. users have 30 days to complete registration). Sponsored organizations can also choose not to have an expiration period set.
- Payment for pre-paid OTP credentials is required before the service starts.
- Funds are automatically decremented from the deposited amount once a credential is registered. If funds are depleted, users are unable to complete registration of their sponsored credential. However, they may purchase the credential.
- A list of all organizations that are sponsoring OTP credentials must be provided to Exostar. Once the list is received, Exostar will setup the organization to sponsor OTP credentials (and expiration periods if applicable).
- All Adoption Administrators from sponsoring organizations are eligible to sponsor user credentials.

Once all pre-requisites are met, Adoption Administrators will be notified that they can start sponsoring credentials via Exostar's Adoption Module.

### Sponsored Credentials Rules

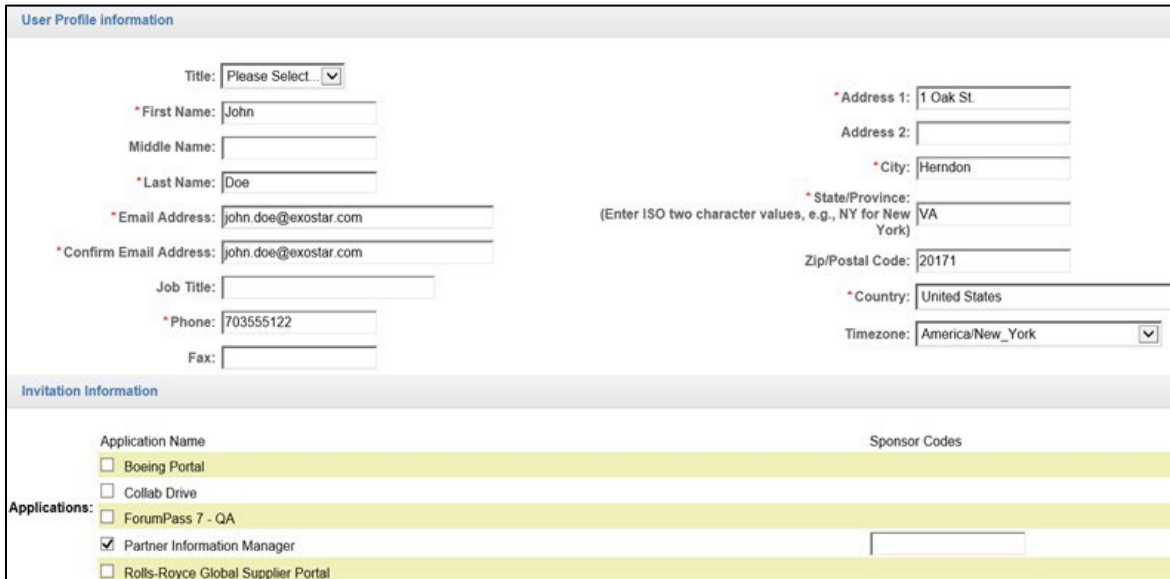
Once an organization is setup to sponsor user credentials, the following rules apply:

- Organizations sponsoring OTP credentials must have sufficient funds.
- Adoption Administrators can only sponsor credentials if the user does not have any OTP credentials registered to their account.
- Adoption Administrators are unable to sponsor OTP credentials for users whose organizations are subscribed to Enterprise Access Gateway (EAG).
- If subscribing a user to Federated Identity Service (FIS), Adoption Administrators are unable to sponsor credentials.
- If there is an outstanding or pending invitation for the user's sponsored credential, Adoption Administrators are unable to sponsor credentials until the invitation is expired or denied.
- FIS credentials cannot be sponsored.

## Invitation Issuance for Sponsored Credentials

Follow the instructions below to issue invitations when credentials are sponsored for new or existing users.

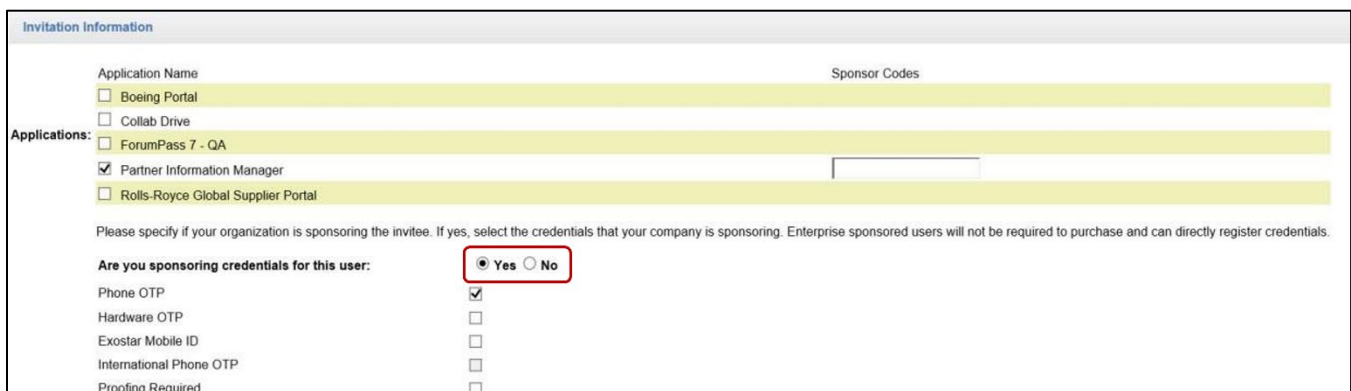
1. Ensure the **User Profile Information** section is complete. Scroll to the **Invitation Information** section to select the application you are subscribing the user to access.



The screenshot shows two sections of a web form. The top section, titled "User Profile Information", contains fields for Title (a dropdown menu), First Name (John), Middle Name, Last Name (Doe), Email Address (john.doe@exostar.com), Confirm Email Address (john.doe@exostar.com), Job Title, Phone (703555122), and Fax. The right side of this section contains fields for Address 1 (1 Oak St), Address 2, City (Herndon), State/Province (VA), Zip/Postal Code (20171), Country (United States), and Timezone (America/New\_York). The bottom section, titled "Invitation Information", contains a table with columns "Application Name" and "Sponsor Codes". The table lists five applications: Boeing Portal, Collab Drive, ForumPass 7 - QA, Partner Information Manager (checked), and Rolls-Royce Global Supplier Portal. A text input field for "Sponsor Codes" is visible next to the Partner Information Manager application.

2. If sponsoring credentials, select **Yes** then select credential type by checking the box next to the credential.

**NOTE:** If identity proofing is required for the OTP credential, select **Proofing Required** along with the credential type. If user credentials are not being sponsored, select **No**. Credentials are not sponsored. However, the user receives an email advising that a purchase is required.



The screenshot shows the "Invitation Information" section of the web form. It includes the same application selection table as the previous screenshot. Below the table, there is a text prompt: "Please specify if your organization is sponsoring the invitee. If yes, select the credentials that your company is sponsoring. Enterprise sponsored users will not be required to purchase and can directly register credentials." This is followed by a section titled "Are you sponsoring credentials for this user:" with radio buttons for "Yes" (selected) and "No". Below this, there is a list of credential types with checkboxes: Phone OTP (checked), Hardware OTP, Exostar Mobile ID, International Phone OTP, and Proofing Required.

3. If your organization has insufficient funds for sponsoring user credentials, a notification will display. Please work with Exostar Sales to replenish funds.



4. When ready to submit, click **Save**. The user receives an email advising that credentials are sponsored. If you have set an expiration date for registration of the credential, the user must complete registration within the expiration time period.

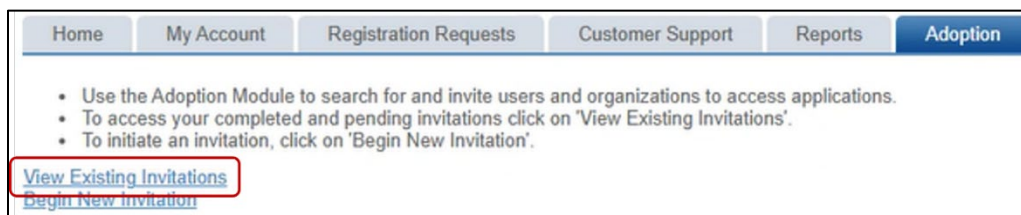
## CREATE PARTNER COMPANY RELATIONSHIP (REQUIRED FOR PIM SUBSCRIPTIONS)

Creating this relationship allows your company to view a shared form in PIM. If you do not complete this step, you will be unable to see your partner company's (supplier) form.

1. Once you locate the organization and access the organization's details, **click Invite Organization** from the **Actions** menu.
2. Click **Edit Organization Subscriptions**.
3. Select **Partner Information Manager**, and select the required form. If the system does not allow you to select the form, the relationship has already been established. No further action is required. You can access PIM to check the status of your supplier.
4. Click **Save**, then **Submit Invitation**. PIM Application Administrators receive an email notification.
5. If you locate an existing account for the user, but the user is not subscribed to PIM, you will need to subscribe this user to PIM. From user search, determine if the user is subscribed to PIM. View the List of Active Apps column. If PIM displays in the **List of Pending Apps** column, user must contact the Application Administrator at their organization. If PIM does not display in **List of Active Apps** or **List of Pending Apps**, you must subscribe the user to the PIM application. If the user is subscribed to PIM, no further action is required.

## TRACK INVITATIONS

1. To track invitations, go to the Adoption Module and click **View Existing Invitations**.



2. On the **Track Invitations** page, search invitations sent by you or by any **Adoption Administrator**. You also have the ability to invite a user by clicking **Invite Users**.

Invite Users
Close

Track Invitations

Request Type : All Pending Invitations ▼

Search By : Please select... ▼

Search For :

Search

Request ID ◂	Invitee ◂	Email Address ◂	Adoption Administrator First Name ◂	Adoption Administrator Last Name ◂	External Source
<a href="#">0e6d81a4-6d6f-4d1b-8996-4d760a048cc9</a>	Amul org		PM	Ali Khan EPA uat	Exostar QA

3. Select the following information:
  - a. **Request Type:** choose from the drop down menu
    - **My Pending Invitations:** all pending invitations issued by the Adoption Administrator
    - **My Complete Invitations:** all completed invitations issued by the Adoption Administrator
    - **All Pending Invitations:** all pending invitations issued by all Adoption Administrators
  - b. **All Complete invitations:** all completed invitations issued by all Adoption Administrators
  - c. **Search By:** this field is NOT required. Choose to search by any criteria listed in the dropdown menu, including: email address, Exostar ID, Organization ID, External Org ID, External User ID, or Date Submitted.

**NOTE:** The search criteria below depends on the request type you select:

- Email Address
  - Exostar ID
  - Organization Name
  - Adoption Administrator Last Name: unavailable if searching using My Pending and My Complete invitations
  - Adoption Administrator First Name
  - External Organization ID
  - External User ID
  - Date Submitted: specify a date range for your search
  - Date Completed: specify a date range for your search. This option is unavailable if searching by pending requests.
4. Once you set your criteria, click **Search**. The results vary depending on the search criteria you set.

Track Invitations

Request Type :

Search By :

Search For :

Results per page:

Request ID	Invitee	Email Address	Adoption Administrator First Name	Adoption Administrator Last Name	External Source Name	External Organization ID	External User ID	Status
<a href="#">f059a138-e063-4e1e-8cf8-2b64670e8827</a>	INTEGRATED NETWORKING TECH			Evans	Exostar LLC			Pending
<a href="#">3c234d7f-3369-4e73-9260-e9ac22fe1669</a>	Bell Helicopter-FIS Testing-SHA-2			Evans	Exostar LLC			Pending

5. Click the **Request ID hyperlink** to view invitation details.

User Invitation Detail (REF:1679b103-d033-4a59-880f-841ec5e6a8c4)

User Profile Summary

E-mail: wamga8@qftgsivj.mailosaur.net  
 First Name: magXPRwtBFaS  
 Last Name: magWzMoZPmXGK  
 Organization Name: magdrahKEHZAMCe  
 Address 1: 3389 LuSuX street  
 City: Dallas  
 Zip/Postal Code: 98961  
 External Source Name: Exostar LLC  
 External User ID:  
 FIS Assurance Level: N/A

Title:  
 Middle Name:  
 Job Title:  
 Organization ID: EXO115893860  
 Address 2:  
 State/Province: TX  
 Country: UNITED STATES  
 External Organization ID:  
 MAG Status: Pending  
 Message to User:

Invitation Status

User Invitation Status: Pending  
 Date Submitted: 06 Mar, 2025 05:04 AM EST  
 Adoption Administrator: EPA Automation

Org Invitation Status: Invited  
 Date Completed:

User Application Details

Application Name	Status	Application Administrator Role Assigned	Organization Application Subscription Required
Test Service Provider	Pending	No	Yes

Organization Application Details

Application Name	Status	Notes
TSP_1	Invited	

## DELETE INVITATIONS

1. To delete an invitation, access the **Adoption** tab and click **View Existing Invitations**.

Home My Account Registration Requests Customer Support Reports **Adoption**

- Use the Adoption Module to search for and invite users and organizations to access applications.
- To access your completed and pending invitations click on 'View Existing Invitations'.
- To initiate an invitation, click on 'Begin New Invitation'.

[View Existing Invitations](#)  
[Begin New Invitation](#)

Need additional help? - [Refer to the Adoption Administrator Guide](#).

**NOTE:** Deleting an invitation is a permanent action and cannot be reversed.

2. Using the search criteria you selected, find the invitation you want to delete. Then click the **Request ID hyperlink**.

Invite Users

Close

Track Invitations

Request Type : All Pending Invitations

Search By : Please select...

Search For :

Search

Request ID	Invitee	Email Address	Adoption Administrator First Name	Adoption Administrator
0e6d81a4-6d6f-4d1b-8996-4d760a048cc9	Amul org		PM	Ali Khan EPA uat

3. The **Org Invitation** page displays. Click **Delete Invitation**.

Org Invitation Detail (REF:42340407-962c-4fce-accf-9c/4ee1926b7)

Back

Resume

Delete Invitation

Organization Summary

Organization Name: Roberts Plane Crazy

Address 1: 123 airport dr

City: winchester

Zip/Postal Code: 22602

DUNS Number:

External Source Name: Exostar LLC

Organization ID: EXO119914921

Address 2:

State/Province: va

Country: United States

MAG Status: Active

External Organization ID:

Invitation Status

Invitation Status: Incomplete

Date Submitted: 12 Oct, 2016 10:21 AM EDT

Date Completed:

Adoption Administrator: Davida Evans

4. After you delete the invitation, you will no longer see it in the listing on the search page.

SUBSCRIBE COMPANY OR USER TO FEDERATED IDENTITY SERVICE

When inviting a company to Federated Identity Service (FIS), you are required to invite a user. To verify if a company is subscribed to FIS, and what assurance level the company is subscribed to, view the **PKI** column during your **Organization Search**. The illustration below shows the company is subscribed to FIS Medium Level of Assurance.

**Organization Search**

Organization Name:

DUNS Number:

Address 1:

City:

Country:

External Source Name:

• Please review the search results carefully.  
• In an effort to avoid duplication, you should only proceed with creating a new organization if you are certain that the organization

Org Name	Org ID	Exostar ID	External ID	MAG Status	PKI	RIDP Status
<a href="#">Roberts Plane Crazy</a> 123 airport dr winchester, va 22602, United States	EXO119914921	119914921		Active	<b>FIS Medium</b>	N/A

1. To invite the user to FIS, click **Add User** under the **Actions** section.

**samtest 22 - Org Summary**

☒ Organization Summary

☒ MAG Information

**Actions**

[Edit Organization](#)

[Subscriptions](#)

[List Users](#)

**Add User**

[Cancel Invitation](#)

[Save and Resume Later](#)

- Use the links to the left under Actions to add a user to the organization
- At least one user is required to submit the invitation. A Submit link will
- Need additional help? - Refer to the [Adoption Administrator Guide](#)

Organization Name: samtest 22

Address 2:

State/Province: New York

Country: UNITED STATES

Other DUNS Number:

Organization ID: EXO118248728

2. Enter the user's information. Under the **Invitation Information** section, select **FIS**.

**User Profile information**

Title:

\*First Name:

Middle Name:

\*Last Name:

\*Email Address:

\*Confirm Email Address:

Job Title:

\*Phone:

Fax:

\*Address 1:

Address 2:

\*City:

\*State/Province:

Zip/Postal Code:

\*Country:

Timezone:

3. When you select **FIS**, the field expands. Enter the **certificate details**.



**Invitation Information**

Application Name: ☐ **Federated Identity Service (FIS)** Sponsor Codes: Application Administrator

\* Certificate Assurance Level: Basic

\* Certificate Type: Software

\* Certificate Usage: Identity

\* Certificate Validity period: 1 Year

\* Partner Application: Please Select ...

\* Request Reason: Please Select ...

[Help with FIS Certificates](#)

4. Select the **External Source Name** and click **Next**.

**Invitation Information**

\* External Source Name: Please Select ...  The External Source Name identifies the partner issuing the invitation. It is required in order to enter an External User ID and External Organization ID. [Get more information on External Source Names here.](#)

External User ID:  External User ID is a unique identifier used by your organization for this user.

External Organization ID: 123  External Organization ID is a unique identifier used by your organization for this user.

External Organization ID, External User ID, and Sponsor Code are all optional fields. For help with these fields, [view more information.](#)

Message to User (to be included in email notification):

I am inviting on behalf of: ☐

**Next** **Cancel** [Help with FIS Certificates](#)

5. The invitation information displays. If everything is correct, click **Submit**.

**Invitation Information**

Full Name : Bee Moore

Email Address: bmorelova@gmail.com

Organization Name: IHOP

Organization ID: EXO116876619

OTP Hardware Token Required : NO

Message to User :

Subscribe User to Application	Assign Application Administrator Role to User
Federated Identity Service (FIS)(Assurance level: Medium Type: Software Validity Period: 1 Year)	No

Click 'Submit' to issue the invitation for the application(s) listed.

**Submit** **Cancel**

6. You receive a message stating the invitation issued successfully.

## NOTES:

- If you are inviting a user to FIS and the organization is subscribed to FIS, requests are always routed to the **FIS Administrator** for approval.
- If the organization is not subscribed to FIS, the system routes the request to Exostar for approval.
- If you are inviting a user to an application group, and the organization is already subscribed to the application group, requests are always routed to the **Application Administrator** for approval.
- If the organization is not subscribed to the application group (bundled applications), the system routes the request to Exostar for approval.



## ADOPTION MODULE INVITATION STATUSES

- **Invited:** User/Organization has been invited.
- **Vendor in Process:** Invitation has been sent. The point of contact has started but not accepted or completed the invitation.
- **Pending Exostar Approval:** Invitation is awaiting Exostar approval.
- **Pending:** Invitation is “Active” and pending for further action.
- **Incomplete:** User has not completed the invitation.
- **Completed with Exceptions:** An invitation typically contains multiple actions (e.g. user creation, subscribing the user or organization to an application). When one or more actions of the invitation fails, the invitation will result in this status.
- **Completed:** Invitation has been completed.
- **Rejected:** Invitation has been rejected.
- **Expired:** Invitation is expired.
- **Failed:** All parts of the invitation failed.
- **Cancelled:** Invitation is cancelled.
- **Denied:** Completed invitation has been denied by Exostar most likely due to an existing organization with the same name and/or address.

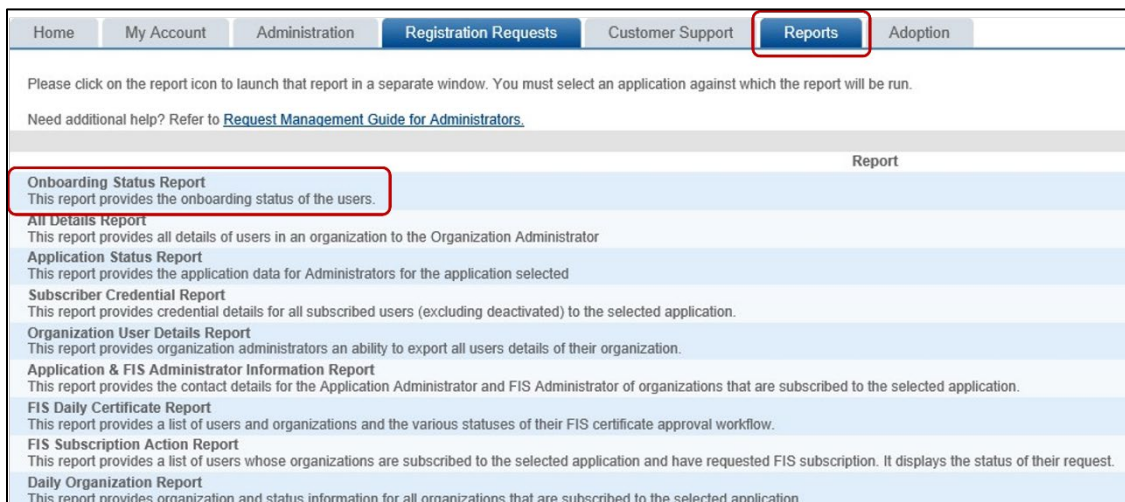
## ONBOARDING STATUS REPORT

**Onboarding Status Report** is available to Adoption Administrators. This report is a quick and convenient tool for tracking the onboarding of all suppliers invited to MAG by your organization.

- Have your suppliers registered for a MAG account, or invitations are still pending?
- Have they obtained their credentials and undergone identity proofing?
- Who is the point of contact for each individual company?

Use this report to gain quick intelligence into where your partners are in their MAG onboarding journey.

After clicking the **Reports** tab, you will be taken to the list of reports available for your administrative role. Follow the prompts to generate the Onboarding Status Report.



The screenshot shows the Exostar user interface. At the top, there is a navigation bar with tabs: Home, My Account, Administration, Registration Requests, Customer Support, Reports, and Adoption. The 'Reports' tab is selected and highlighted with a red box. Below the navigation bar, there is a message: 'Please click on the report icon to launch that report in a separate window. You must select an application against which the report will be run.' followed by a link: 'Need additional help? Refer to [Request Management Guide for Administrators](#).' Below this, there is a table with the following structure:

Report
<b>Onboarding Status Report</b> This report provides the onboarding status of the users.
<b>All Details Report</b> This report provides all details of users in an organization to the Organization Administrator
<b>Application Status Report</b> This report provides the application data for Administrators for the application selected
<b>Subscriber Credential Report</b> This report provides credential details for all subscribed users (excluding deactivated) to the selected application.
<b>Organization User Details Report</b> This report provides organization administrators an ability to export all users details of their organization.
<b>Application &amp; FIS Administrator Information Report</b> This report provides the contact details for the Application Administrator and FIS Administrator of organizations that are subscribed to the selected application.
<b>FIS Daily Certificate Report</b> This report provides a list of users and organizations and the various statuses of their FIS certificate approval workflow.
<b>FIS Subscription Action Report</b> This report provides a list of users whose organizations are subscribed to the selected application and have requested FIS subscription. It displays the status of their request.
<b>Daily Organization Report</b> This report provides organization and status information for all organizations that are subscribed to the selected application.