



# Onboarding Module (OBM) Supplier Guide

October 2024



CONTENTS

Onboarding Module (OBM) Overview .....3

Roles, Permissions, Responsibilities .....3

Access .....4

OBM Supplier Dashboard .....6

    Top Header ..... 6

    Pending Forms Tab ..... 6

    Pending Approval Forms Tab..... 8

    Completed Forms Tab..... 10

    Cancelled Forms Tab..... 11

    Communication..... 11

    My Organization ..... 13

        User Management..... 13

Form Details..... 14

    Assignment History ..... 15

    Downloads Section ..... 16

        Offline Forms..... 16

        Print Forms ..... 16

Form Renewal..... 17

Form Grouping..... 17

    Business Issue ..... 18

    Solution ..... 18

    Group Setup..... 18

    View Form Groups ..... 19



## ONBOARDING MODULE (OBM) OVERVIEW

The Onboarding Module (OBM) focuses on providing the ability to manage vetting and certification of prospective and existing suppliers. It contains built-in data collection processes and workflows, automated features, and services that allow users to continuously review and make future decisions on supplier relationships.

This role-based user guide outlines functionalities and actions for users in OBM:

- Roles, Permissions, and Responsibilities
- Access
- Navigation
- Viewing Details of Form Assignment for a Supplier Organization
- Viewing and Printing Submitted Forms
- Running and Viewing Reports
- Form Grouping

**IMPORTANT!** You MUST use Google Chrome to access the Onboarding Module application.

## ROLES, PERMISSIONS, RESPONSIBILITIES

OBM provides Supplier Administrator, Supplier Approver, and Supplier User roles. It is important to note that MAG Organization Administrators and MAG Onboarding Module Application Administrators are given the Supplier Administrator role within the Onboarding Module application.

The **Supplier User** role allows users to execute the following actions:

- View form requests assigned to self in Pending Forms, Pending Approval Forms, Completed Forms, and Cancelled Forms
- Edit, Re-assign and Submit the form
- View the Form Details page
- Download, upload, View PDF for completed forms in the Form Details Page
- Initiates communication to the Supplier Administrators

The **Supplier Administrator** role allows users to execute everything a Supplier User can, in addition to the following:

- Assign roles to users
- Assign Supplier Users and Supplier Approvers to forms
- Respond to communication initiated by Supplier Users

The **Supplier Approver** role can execute the following actions:



- Access the Pending Approval forms tab and Accept or Deny only forms assigned to self, with a comment

## ACCESS

To access OBM, you must have an Exostar's Managed Access Gateway (MAG) account, as well as an acceptable security credential. Please note, **your Buyer Organization determines the credential requirement**, so please reach out to your Buyer for more information. For help resetting your MAG password or any other MAG-related questions, refer to [https://www.myexostar.com/?ht\\_kb=mag](https://www.myexostar.com/?ht_kb=mag).

**NOTE:** If you are the first user in your organization to access OBM, you must accept the standard MAG Usage Service Agreement. If you see **Agree to Terms** on the **Onboarding Module** tile in your MAG account, click the button and accept the service agreement.

Once you successfully activate your MAG account, all subsequent logins proceed as follows:

1. Navigate to <https://portal.exostar.com>. Input your **Email Address** or **User ID**. Click **Next**.

Step 1/2: Email Address / User ID

### Login

Enter your Email Address or User ID

Email Address or User ID

[Login Using Company Credential \(EAG\) ?](#) [Login Using Badge or Certificate ?](#) [Need help?](#) **NEXT**

Don't have an account? [Register](#)

Unauthorized access to this system may constitute a criminal offense.

2. Input your **Password**. Click **Next** to access the MAG Dashboard.

Step 2/2: Password

## Password

Your email address displays here

Enter your Password

[Use a different Email or User ID](#)  
[Forgot Password?](#)

NEXT

- From the **My Applications** section, click the **Launch** button from the **Onboarding Module** tile.

Dashboard My Account Administration Registration Requests Reports

My 2FA Credentials Credential Strength: Username and Password Manage and Renew Get 2FA Have a license key? Enter it here

Elevate your credential strength: Some of your applications are more secure than others. To access them more quickly, elevate your security with your preferred 2FA if you have 2FA.

Link your existing credentials: Badge: Get access to applications using DoD CAC (CAC Policy), NASA PIV, NGC OneBadge, or Canada DND PKI Smart Card. [Link now](#)

Federated Identity Service (FIS) Inactive [Request Access](#)

### Applications

My Applications Open Applications Request Applications

| Exostar Buyer                                                                            | Test Service Provider                                                          | Test Service Provider                                                          |
|------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <b>Onboarding Module</b><br>Status: Active<br>Last Access: 06/24/2022 01:42 PM<br>Launch | <b>Test Service Provider</b><br>Status: Pending<br>Pending Approval<br>Details | <b>Demo Service Provider</b><br>Status: Pending<br>Pending Approval<br>Details |

**IMPORTANT:** At this point in the process, the system may prompt for your security credential. The Buyer Organization determines the credential type required to access the OBM application and 2FA enabled forms. Please reach out to the Buyer for more information on the credential type. A 2FA enabled form will be represented with a lock, shown below.

| Pending Forms                                                                          | Pending Approval Forms                                                                                                                     | Completed Forms                                                                                                      | Cancelled Forms                                                                                                       |
|----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| <div>  CSQ-94           </div> <div>             Request No: CD9PNA7U           </div> | <div>             Initiated Date 10/20/2022<br/>             Due Date 12/04/2022<br/>             Assigned To Subbaiah BA           </div> | <div>             Status New<br/>             Status Date 10/20/2022<br/>             Reassigned No           </div> | <div>             Revision 2.1<br/>             Form Progress 0%<br/>             Request Status 60%           </div> |

- Once you successfully login with your security credential, the system displays the **Export Control Acknowledgement**. Place a checkmark next to **I understand that this application**



is accessible by both U.S. and Non-U.S. Persons. I agree not to post Export Controlled Technical Information to this application. Click Accept.

Export Control Acknowledgement

☐ I understand that this application is accessible by both U.S. and Non-U.S. Persons. I agree not to post Export Controlled Technical information to this Application.

[Decline](#) [Accept](#)

Once you acknowledge the notice, the OBM dashboard displays.

## OBM SUPPLIER DASHBOARD

The OBM Dashboard displays upon successful login. Users can conduct various tasks from the Dashboard.

### Top Header

The top header provides the following options, and is static regardless of where you are in the OBM application:

- **Exostar Logo:** Click this to redirect to Exostar's corporate website.
- **Onboarding Module:** Click this to navigate to the OBM Dashboard.
- **Home:** Click this to navigate to the OBM Dashboard.
- **myExostar:** Click this to navigate to Exostar's self-help site, which provides on-screen help content, downloadable guides, FAQs, etc.
- **Contact Us:** This option is configurable to point to the desired contact.
- **Help:** Click this to open Exostar's Support page. This page provides dial-in numbers, a Chat feature, as well as an online case form.
- **User Drop-down:** This section displays your role, and provides options to navigate to your profile, as well as to logout of the system.

Onboarding Module  
We build trust.

[Home](#) | [myExostar](#) | [Contact Us](#) | [Help](#)

Ashleigh Howell ▾  
Supplier Administrator

[My Profile](#)  
[Logout](#)

QA test: "Supplier Announcement Test"

### Pending Forms Tab

This tab displays a comprehensive list of all pending forms assigned to you, and additional details like Revision, Form Progress, and the Request Status. Click the hyperlinked form name to open



the **Form Details** page. The action menu, located to the right of each form provides options to reassign and assign approvers. Please see the Form Details section below for more information.

| Pending Forms                                                                                                                                                                                                                                                                                         | Pending Approval Forms | Completed Forms | Cancelled Forms                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-----------------|-------------------------------------------------------|
| <div>sign_test2<br/>Request No:<br/>6VXAISNV</div> <div>Initiated Date 10/19/2022<br/>Due Date 12/03/2022<br/>Assigned To <a href="#">Exostar Supplier</a></div> <div>Status New<br/>Status Date 10/19/2022<br/>Reassigned No</div> <div>Revision 1.1<br/>Form Progress 100%<br/>Request Status</div> |                        |                 | <div>⋮</div> <div>Reassign<br/>Assign Approvers</div> |
| <div>Test101<br/>Request No:<br/>OA7IDRGS</div> <div>Initiated Date 10/19/2022<br/>Due Date 12/03/2022<br/>Assigned To <a href="#">2.bas</a></div> <div>Status New<br/>Status Date 10/19/2022<br/>Reassigned Yes</div> <div>Revision 2.1<br/>Form Progress 100%<br/>Request Status 60%</div>          |                        |                 | <div>⋮</div>                                          |

To Assign Approvers:

1. Select the action link (three dots), located to the right the desired form. Select **Assign Approvers**.

| Pending Forms                                                                                                                                                                                                                                                                                      | Pending Approval Forms | Completed Forms | Cancelled Forms                                       |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-----------------|-------------------------------------------------------|
| <div>sign_test2<br/>Request No:<br/>6VXAISNV</div> <div>Initiated Date 10/19/2022<br/>Due Date 12/03/2022<br/>Assigned To <a href="#">Exostar Supplier</a></div> <div>Status New<br/>Status Date 10/19/2022<br/>Reassigned No</div> <div>Revision 1.1<br/>Form Progress 100%<br/>Request Sta</div> |                        |                 | <div>⋮</div> <div>Reassign<br/>Assign Approvers</div> |
| <div>Test101<br/>Request No:<br/>OA7IDRGS</div> <div>Initiated Date 10/19/2022<br/>Due Date 12/03/2022<br/>Assigned To <a href="#">2.bas</a></div> <div>Status New<br/>Status Date 10/19/2022<br/>Reassigned Yes</div> <div>Revision 2.1<br/>Form Progress 100%<br/>Request Status 60%</div>       |                        |                 | <div>⋮</div>                                          |

2. Make desired user selection.
3. If desired, select to **Enable Approval Workflow**. Select **Approvers**.
4. Click **Save**.

Workflow User Assignments

Assign To User \*  
Subbaiah Achappa

☒ Enable Approval Workflow

Approver  
Erica Evans

Approver  
-- Select User --

DELETE

Add Another Approver

Cancel Save



### Pending Approval Forms Tab

This tab displays a comprehensive list of all forms pending approval, and other additional details including approver names for each form. Please note the form moves to this tab only if Approver workflow is enabled and the user has submitted the form. Each form displays the list of approvers assigned to the form. The name of the approver currently logged into the system will have their

name represented as a link. It will also indicate whether the decision is **Pending** or **Completed** for a form. The link will be enabled if the user has not submitted their decision.

| Pending Forms                                | Pending Approval Forms                                                                                                                              | Completed Forms                                                | Cancelled Forms                                        |
|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|--------------------------------------------------------|
| <b>sign_test2</b><br>Request No:<br>6VXAISNV | Initiated Date 10/19/2022<br>Due Date 12/03/2022<br>Assigned To <a href="#">Subbaiah Achappa</a><br><br>Approvers: <a href="#">2 bas</a><br>Pending | Status In Progress<br>Status Date 10/19/2022<br>Reassigned Yes | Buyer Approval Status Not Started<br>Revision 1.1      |
| <b>Form23</b><br>Request No:<br>PHFSULQO     | Initiated Date 05/23/2022<br>Due Date 07/07/2022<br>Assigned To <a href="#">Subbaiah Achappa</a><br><br>Approvers: 2 bas<br>Completed               | Status In Progress<br>Status Date 05/23/2022<br>Reassigned Yes | Buyer Approval Status Pending Decision<br>Revision 0.1 |

1 - 2 of 2 items

When the user clicks on their name, the system displays a modal allowing them to enter their **Decision**, state the **Reason**, and **Submit**.

Enter Decision

X

Current Approver: 2 bas

Decision:  
☒ Approve  
☐ Reject

Reason

Cancel



The link will be disabled if the decision has already been submitted.

| Pending Forms                                         | Pending Approval Forms                                                                                                                            | Completed Forms                                                | Cancelled Forms                                        |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|--------------------------------------------------------|
| <a href="#">sign_test2</a><br>Request No:<br>6VXAISNV | Initiated Date 10/19/2022<br>Due Date 12/03/2022<br>Assigned To <a href="#">Subbaiah Achappa</a><br><br><div>Approvers: 2 bas<br/>Completed</div> | Status In Progress<br>Status Date 10/19/2022<br>Reassigned Yes | Buyer Approval Status Pending Decision<br>Revision 1.1 |
| <a href="#">Form23</a><br>Request No:<br>PHFSULQO     | Initiated Date 05/23/2022<br>Due Date 07/07/2022<br>Assigned To <a href="#">Subbaiah Achappa</a><br><br>Approvers: 2 bas<br>Completed             | Status In Progress<br>Status Date 05/23/2022<br>Reassigned Yes | Buyer Approval Status Pending Decision<br>Revision 0.1 |

## Completed Forms Tab

This tab displays a comprehensive list of all completed forms, additional details like expiration date for each form. Note the form moves to this tab only once the form is submitted and all the approvers have approved the forms. Click the hyperlinked form name to open the **Form Details** page. This page also has a link to the **Approval Summary**, and once clicked, you can view the **Approval Decision**.

| Pending Forms                                       | Pending Approval Forms                                                                                                                 | Completed Forms                                                   | Cancelled Forms                                        |
|-----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|--------------------------------------------------------|
| <a href="#">nov42021</a><br>Request No:<br>RPDYYSMU | Initiated Date 11/04/2021<br>Expiration Date 11/08/2022<br>Assigned To <a href="#">Subbaiah BA</a>                                     | Form Status Completed<br>Status Date 11/08/2021<br>Reassigned Yes | Buyer Approval Status N/A<br>Revision 1.0              |
| <a href="#">4nov</a><br>Request No:<br>JMJK3OE0     | Initiated Date 11/04/2021<br>Expiration Date 01/13/2022<br>Assigned To <a href="#">Subbaiah BA</a><br><a href="#">Approval Summary</a> | Form Status Completed<br>Status Date 11/04/2021<br>Reassigned Yes | Buyer Approval Status Pending Decision<br>Revision 1.0 |
| <a href="#">29oct</a><br>Request No:<br>JLUXBIDW    | Initiated Date 10/29/2021<br>Expiration Date 01/06/2022<br>Assigned To <a href="#">Hemant Kattupolu</a>                                | Form Status Completed<br>Status Date 10/29/2021<br>Reassigned Yes | Buyer Approval Status N/A<br>Revision 1.0              |

Approval Decision

Approved - 9/16/2022 3:34:49 PM

Approver: Subbaiah Achappa  
Decision: Approved  
Reason: test

OKAY

## Cancelled Forms Tab

This tab displays a comprehensive list of all cancelled forms, and additional details for each form. Click the hyperlinked form name to open the **Form Details** page.

| Pending Forms                                                                                                                                                                                                                                                                                                                                                                                    | Pending Approval Forms | Completed Forms | Cancelled Forms |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-----------------|-----------------|
| <div> <div>Moog Demo</div> <div>Request No: WZDJYMGJ</div> </div> <div> <div>Initiated Date: 10/05/2021</div> <div>Due Date: 11/19/2021</div> <div>Assigned To: <a href="#">Hemanth Karugolu</a></div> </div> <div> <div>Status: Cancel</div> <div>Status Date: 10/27/2021</div> <div>Reassigned: Yes</div> </div> <div> <div>Revision: 0.1</div> <div>Reason Cancelled: New form</div> </div>   |                        |                 |                 |
| <div> <div>Moog Demo</div> <div>Request No: MUG5G3PV</div> </div> <div> <div>Initiated Date: 10/04/2021</div> <div>Due Date: 11/18/2021</div> <div>Assigned To: <a href="#">Hemanth Karugolu</a></div> </div> <div> <div>Status: Cancel</div> <div>Status Date: 10/05/2021</div> <div>Reassigned: Yes</div> </div> <div> <div>Revision: 0.1</div> <div>Reason Cancelled: Blank Form</div> </div> |                        |                 |                 |
| <div> <div>MDMtest2</div> <div>Request No: 4RU4CSZJ</div> </div> <div> <div>Initiated Date: 09/27/2021</div> <div>Due Date: 11/11/2021</div> <div>Assigned To: <a href="#">Subbairah BA</a></div> </div> <div> <div>Status: Cancel</div> <div>Status Date: 10/04/2021</div> <div>Reassigned: Yes</div> </div> <div> <div>Revision: 0.1</div> <div>Reason Cancelled: test</div> </div>            |                        |                 |                 |

## Communication

The Communication section of the dashboard provides messaging capabilities. The table displays the latest messaging thread, along with additional details, and a reply option. Select **View All** below the most recent messages to view a comprehensive list of all messaging threads. Only a Supplier User can initiate a communication with an Administrator by clicking **Add New Question**.

Add New Question

Communication

Q Hello

how is expiration set

Created 10/19/2022 Last updated 10/19/2022 Replies 0

Reply

Q hi

started uat testing

Created 09/09/2022 Last updated 09/09/2022 Replies 1

Reply

View All

To view the entire messaging thread and reply:

1. Click the hyperlinked **Subject**.

Communication

**Q** **New message 3-4-44**  
Testing again 3-4-22  
Created **03/04/2022** Last updated **03/04/2022** Replies **2** [Reply](#)

**Q** **March8th**  
Is it March 8th today?  
Created **03/08/2022** Last updated **03/08/2022** Replies **6** [Reply](#)

[View All](#)

2. The thread displays. View each message via the **Replies** tab. Input a reply in the field provided. Click **Add**.

Question Details

Subject **New message 3-4-44**  
Body **Testing again 3-4-22**  
Created On **3/4/2022**  
Posted By **Richard Maier**

**Replies**

**A** Testing 1,2,3...  
Created **5/10/2022** Posted By **Exostar Supplier**

**A** hi  
Created **5/18/2022** Posted By **Subbaiah BA**

**Reply:**


**Add**



## My Organization

The section displays details specific to your organization, including a hyperlinked number of users associated with your organization and your hyperlinked organization name.

**My Organization**

 **8 users**

[Supplier SEM One](#)

**ESD#** 123456789

**EXOID** 119664516

**MPID**  
4f3edcf1-60b6-40ca-96c9-893851beb055


**DUNS**  
**Global DUNS**  
123 main st. ,  
Aldie, Alaska, 20105,  
**Location** US.

## User Management

As an administrator, you can manage users associated with your organization within the OBM application. To manage users:

1. Select the number of users or organization name via the **My Organization** widget.

**My Organization**




 **8 users**

[Supplier SEM One](#)

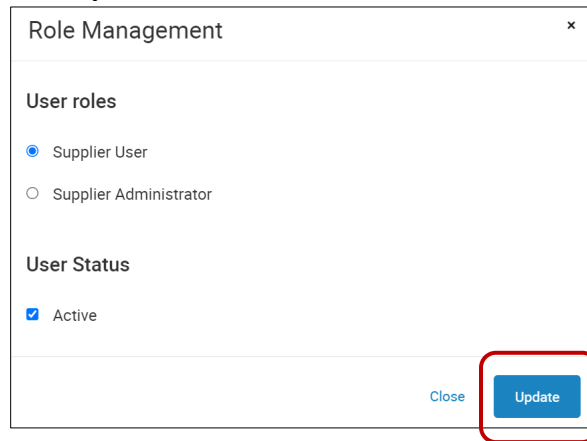
**ESD#** 123456789

**EXOID** 119664516

2. Select the **Manage** option next to the desired user.

| User                             |                                      |                                                                                      |                        |             |              |                                                                                       |        |
|----------------------------------|--------------------------------------|--------------------------------------------------------------------------------------|------------------------|-------------|--------------|---------------------------------------------------------------------------------------|--------|
| Name                             | User ID                              | Email                                                                                | Role                   | Provisioned | Date Updated | Manage                                                                                |        |
| <a href="#">Bhagya Shree</a>     | shreeb_2007@fis.evincibletest.com    | <a href="mailto:bhagyashree.b.s+564@exostar.com">bhagyashree.b.s+564@exostar.com</a> | Supplier User          | 09/16/2021  | 09/16/2021   |  | Manage |
| <a href="#">Kevin Hancock</a>    | hancockk_5278@fis.evincibletest.com  | <a href="mailto:kevin.hancock+122@exostar.com">kevin.hancock+122@exostar.com</a>     | Supplier Administrator | 09/07/2021  | 09/09/2021   |  | Manage |
| <a href="#">Training Exostar</a> | exostar_t_8005@fis.evincibletest.com | <a href="mailto:training+123@exostar.com">training+123@exostar.com</a>               | Supplier Administrator | 08/17/2021  | 09/03/2021   |  | Manage |

3. In the **Role Management** window, select the desired roles and update the User's **Active** status, if desired. Click **Update**.



The screenshot shows a 'Role Management' dialog box. It has a title bar with a close button. Inside, there are two sections: 'User roles' and 'User Status'. Under 'User roles', there are two radio buttons: 'Supplier User' (selected) and 'Supplier Administrator'. Under 'User Status', there is a checked checkbox for 'Active'. At the bottom right, there are two buttons: 'Close' and 'Update'. The 'Update' button is highlighted with a red rectangular box.

## FORM DETAILS

Access the Form Details page by selecting the desired Form Name anywhere in the OBM system. The Form Details page displays the following supplier attributes:

- Recent Request
- Revision History
- Assignment History
- Summary
- Section Progress



The Form Details page also provides the ability to download, upload, and view the form, as well as allows users to print the latest submission and all previously completed submissions of the form.

Form Details CSQ-94 (test)

Recent Request

|                 |                             |                   |                                 |
|-----------------|-----------------------------|-------------------|---------------------------------|
| Request No      | CD9PNA7U                    | Request Date      | 10/20/2022                      |
| Request Type    | Assign (Renew)              | Status Date       | 10/21/2022                      |
| Current Status  | Completed                   | Date Assigned     | 10/20/2022                      |
| Assigned To     | <a href="#">Subbalah BA</a> | Date Due          | 12/04/2022                      |
| Latest Revision | 3.0                         | Requester's Name  | Hemanth Kanugolu                |
| Expires on      | 10/21/2022                  | Requester's Email | hemanth.kanugolu_01@exostar.com |

Revision History

| Revision | Type      | Date       | Download                 |
|----------|-----------|------------|--------------------------|
| 3.0      | Submitted | 10/20/2022 | <a href="#">Download</a> |
| 2.0      | Submitted | 10/20/2022 | <a href="#">Download</a> |
| 1.0      | Submitted | 10/20/2022 | <a href="#">Download</a> |

Assignment History

| User                        | Date Assigned |
|-----------------------------|---------------|
| <a href="#">Subbalah BA</a> | 10/20/2022    |

Summary

Overall Score 3.54

Capability Score 2.96

Online Form  
Empty Forms [Download](#)  
Latest Submitted Revision 3.0 [Download](#) [View](#)

Offline Forms  
Download Editable Forms [Download](#)  
Upload Form  
[Choose File](#) | [N...](#)  
[Upload PDF](#)

Section Progress

Submitter Details

1. Device Inventory 33 %

2. Software Inventory 38 %

3. Secure Configurations 38 %

4. Assess/Remediation 38 %

5. Malware Defenses 38 %

Exit Renew

## Assignment History

The Assignment History table displays the user and date assignment in a table format.

Form Details CSQ-94 (test)

Recent Request

|                 |                             |                   |                                 |
|-----------------|-----------------------------|-------------------|---------------------------------|
| Request No      | CD9PNA7U                    | Request Date      | 10/20/2022                      |
| Request Type    | Assign (Renew)              | Status Date       | 10/21/2022                      |
| Current Status  | Completed                   | Date Assigned     | 10/20/2022                      |
| Assigned To     | <a href="#">Subbalah BA</a> | Date Due          | 12/04/2022                      |
| Latest Revision | 3.0                         | Requester's Name  | Hemanth Kanugolu                |
| Expires on      | 10/21/2022                  | Requester's Email | hemanth.kanugolu_01@exostar.com |

Revision History

| Revision | Type      | Date       | Download                 |
|----------|-----------|------------|--------------------------|
| 3.0      | Submitted | 10/20/2022 | <a href="#">Download</a> |
| 2.0      | Submitted | 10/20/2022 | <a href="#">Download</a> |
| 1.0      | Submitted | 10/20/2022 | <a href="#">Download</a> |

Assignment History

| User                        | Date Assigned |
|-----------------------------|---------------|
| <a href="#">Subbalah BA</a> | 10/20/2022    |

## Downloads Section

This section is located along the right side of the screen, in the Summary section of the Form Details page for custom forms. Select the **MORE DETAILS** option to view. From here, users can download empty forms, the Latest Submitted Revision, as well as offline Editable Forms. You can also upload supported forms.

**Summary**

Overall Score 0.00

**Online Form**

Empty Forms [Download](#)

Latest Submitted Revision 1.0 [Download](#) [View](#)

**Form Response**

Download Form [Download](#)

Upload Form

Select file

**MORE DETAILS** ▲

## Offline Forms

This Section is located on the right side of the Form Details page for standard forms like NIST and Common Questionnaire. You can download **Editable PDFs** using the **Download** button, edit it offline, and upload the form using the **Choose File** link. Exostar recommends using Chrome for this option, for now.

**Offline Form**

Download Editable Form [.pdf]

[Download](#)

Upload Form [.pdf]

[Choose File](#) No file chosen

## Print Forms

Users can only see and download completed/submitted forms. To print the last submitted form:

1. Navigate to the desired Form Details page and locate the **Downloads** section.




2. Click the PDF icon next to **Latest Submitted Revision**.
3. Select the **Print** option.

To view and print any other forms:


1. Go to the **Download** column of the **Revision History** table and click arrow icon for the desired revision number.

Revision History

| Revision | Type      | Date       | Download                                                                            |
|----------|-----------|------------|-------------------------------------------------------------------------------------|
| 1.0      | Submitted | 09/28/2022 |  |

1

1 - 1 of 1 items



2. Select the **Print** option.

## FORM RENEWAL

To renew a form:

1. On all **Completed Form Details** pages, select the **Renew** button at the bottom of the screen or from the action menu.

|                                               |                                                                                    |                                                                  |                                          |
|-----------------------------------------------|------------------------------------------------------------------------------------|------------------------------------------------------------------|------------------------------------------|
| 13julySub_Common_Questionsnaire-WG (Standard) | Initiated Date 07/13/2023<br>Expiration Date 07/12/2024<br>Assigned To Subbaiah BA | Form Status Completed<br>Status Date 07/13/2023<br>Reassigned No | Buyer Approval Status null<br>Revision 2 |
|                                               |                                                                                    |                                                                  | <b>Renew</b>                             |

2. The system prompts for confirmation. Click **Proceed**.

### Renewal Confirmation

The form you are renewing does not expire until 11/08/2022. Are you sure you want to continue?

**Cancel** **Proceed**

**NOTE:** Once you confirm, the form is moved to **Pending Forms** tab.

## FORM GROUPING

Form Grouping is used to share a completed form your organization filled out with your compatriot business units. The sections below provide step-by-step instructions on how to share your group form.



## Business Issue

Company XYZ is composed of several subsidiary companies and/or business units (BU), each one of which is a Supplier to one or several Exostar Buyer organizations. Each of the subsidiaries is being asked to complete forms from one or more Buyer organizations. This results in requesting many of the subsidiaries to complete the same form. The security policies and infrastructure of the subsidiaries of Supplier XYZ are managed and controlled by a single shared service, an organizational unit located within one of the registered XYZ companies/subsidiaries. That unit can answer the form on behalf of many of the XYZ subsidiaries. This unit would like to answer the form once for all subsidiaries covered by its security program.

## Solution

Exostar has the capability to create a Form Group of companies/businesses where one of the businesses can represent the group when completing forms. The XYZ business needs to nominate one of the business units as the source to represent the group. That business completes the form on behalf of the group (Destinations), and the results are provided to Buyers XYZ subsidiaries chose to share the results. In this way, the form is under the control of a single subsidiary or business unit within the group, but shared by any of the others with whatever Buyers they wish.

Destination organizations can share the group form with individual Buyers just like any other normal assigned form with two major exceptions:

- The form is locked and only the Source Organization can edit it. All further edits are reflected in the destination form in real-time.
- When a form is submitted, the scoring of the shared form applies to the one associated with Destination Organization as well.

## Group Setup

Company XYZ needs to do the following to setup the group within Exostar:

1. Create a support case via the Support page and describe the case as Create a Form Group in OBM.
2. Provide the Form Grouping Submission Form that identifies:
  - a. The source business unit by its Exostar ID, DUNS ID, full address, and email address of the responsible person who will handle the security form.
  - b. The destinations or business units within the group by Exostar ID, DUNS ID, and address for each.
  - c. Which form is to be shared with the Destinations.
3. Exostar contacts each destination business unit to confirm they will be added to the new group.
4. Exostar creates the group within the organization data and the form from the source will be available for the destinations.

## NOTES:

- The source organization must submit the form for the responses to be duplicated onto their respective destination organization forms.
- If a new supplier is added to the existing Form group, the Source organization must resubmit (renew) the form for the responses to be duplicated onto their respective destination organization forms.

## View Form Groups

Suppliers can determine if their form groups have been migrated to the Buyer's OBM application by going to the specific form in the Buyer's OBM and reviewing the Form Details page to determine if they are a destination of a form group. The message will read: **This form is being shared by the following organization ORGNAME. You do not have permissions to edit this form.**

The screenshot below shows the form is provided by another organization, which is the **Source** of the completed form.

**Form Details** CCRA FORM (CCRA Questionnaire)

[View](#)

This form is being shared by the following organization :New\_Supplier\_SEM\_One (115340730) .You do not have permissions to edit this form

**Recent Request**

|                 |                                 |                   |                                       |
|-----------------|---------------------------------|-------------------|---------------------------------------|
| Request No      | 5C3KUTST                        | Request Date      | 02/29/2024                            |
| Request Type    | Assign (New)                    | Status Date       | 03/05/2024                            |
| Current Status  | New                             | Date Assigned     | 02/29/2024                            |
| Assigned To     | <a href="#">Suboath Acharoa</a> | Date Due          | 04/14/2024                            |
| Latest Revision | -                               | Requester's Name  | Hemanth Kanugolu                      |
| Expires on      | N/A                             | Requester's Email | Super_user_uat@6dxn1b09.mallosaur.net |

**Revision History**

| Revision | Type | SPRS Score | Date | Download |
|----------|------|------------|------|----------|
|----------|------|------------|------|----------|

**Offline Form**

[Download Editable CCRA Form{xism}](#)

Upload is enabled to only active status

CCRA FORM has not yet been submitted.