



Secure Access Manager (SAM) User Guide

October 2025





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Document Versions

Version	Impacts	Date
SAM 4.0	<ul style="list-style-type: none">• Changed the product name from IAM to MAG• Updated the text and screenshots for the new login and authentication flow (in the "Login to your Exostar SAM Platform Account" section)• Updated the SOTP Client Administrators section	July 2019
SAM 4.1	<ul style="list-style-type: none">• Updated Activation Workflow• Create Password Workflow• Authentication Workflow• Updated Footer• Announcement Banner	March 2020
SAM 4.4	<ul style="list-style-type: none">• Password & security questions enhancements• Improve account activation process• Login screen updates	May 2021
SAM 5.0	<ul style="list-style-type: none">• SP Admin email enhancements• Authentication updates• Manage Credentials sub-tab• Activation email reminders	February 2022
SAM 5.2	<ul style="list-style-type: none">• Link accounts under primary account• OTP registration page enhancements	August 2022
SAM 5.3	<ul style="list-style-type: none">• New Application email templates• Improved registration and login process• New welcome & registration videos• Improved Application admin search features	October 2022
SAM 6.0	<ul style="list-style-type: none">• Improve account consolidation to reduce duplicate accounts• Enhanced Reporting dashboard for Administrators• First Time Login translation in Japanese	July 2023
SAM 6.2	<ul style="list-style-type: none">• New BETA Bulk Upload feature• New Admin Insights Dashboard• Improved SP Admin requests tasks• User profile feature updates	March 2024
SAM 6.6	<ul style="list-style-type: none">• Improved Change Email feature• Improved Account Consolidation feature	September 2025



Introduction

This guide is intended to introduce users to the Secure Access Manager (SAM) solution and its processes.

Application Overview

Exostar's Secure Access Manager (SAM) Platform is a consolidated portal used for account registration, authentication, and management. The authentication gateway supports secure authentication and provides access to applications and services hosted by Exostar and those managed by external entities.

The objective of the SAM Platform is to consolidate registration processes for connecting partners and applications in a secure environment, while providing flexible management and invitation capabilities to application owners.

Key Platform Features:

- Our platform extends the basic concept of web-based Single-Sign-On (SSO) to support the single sign-on location to multiple applications.
- It supports authentication credentials of varying assurance levels.
- It facilitates an organizational approach to registration, account management, and application access.
- It provides organizations with tools to add new users and grant access to applications.

Organization Types in SAM

The Exostar SAM Platform manages the following types of organizations: Organization-Managed Organizations, Exostar-Managed Organizations, and Sponsor-Managed Organizations. Users from Sponsor-Managed Organizations can transform into "Shared Users," if they begin to access applications that do not belong to their sponsor. Read below to understand the difference between these types of organizations.

Organization-Managed Organization (OMO)

An **Organization-Managed Organization** in SAM refers to an organization that is responsible for managing itself. The Org Admin accepts the Terms and Conditions on behalf of the organization members. The organization manages and administers their own users.



Organization-Managed Organization is the only model that will permit establishing SSO / Federated access for their users.

An Organization-Managed Organization has the features below:

- It is self-managed
- Organization is responsible for all users in the organization
- Org Admin accepts T & Cs
- Typically, larger organizations with established IT expertise
- Pre-requisite for establishing SSO / Federated connection

Sponsor-Managed Organization

A **Sponsor-Managed Organization** is an organization registered in Exostar's SAM Platform and managed by the Sponsor. Members of this organization are the responsibility of the Sponsor. The Organization Administrator will accept the Terms and Conditions on behalf of the users within this organization. As long as users access sponsor applications exclusively, the Sponsor's Admin will have full control over these users. However, once a user subscribes to a non-sponsor app, the sponsor's admin will stop having full admin control over the user but will continue administering their organization-specific applications. Shared Users will need to accept Terms and Conditions only once, after subscribing to their first non-sponsor application.

A Sponsor-Managed Organization has the features below:

- This organization is registered & managed by the Sponsor
- The Sponsor is responsible for all non-sponsor users in the organization
- Sponsor Org Admin/MPA accepts T & Cs for applications that belong to the Sponsor-Managed Organization
- Users become shared once subscribed to a non-sponsor application

Exostar-Managed Organization

An Exostar-Managed Organization in SAM is an organization that is managed by Exostar. Users within Exostar-Managed organizations accept user-level Terms and Conditions, but they only need to be accepted once. Adding additional applications will not require users to accept additional terms and conditions again. This type of organization is intended for independent users of the system, who may not belong to a particular organization, and who may need access to multiple sponsor applications. For example, clinical investigators would belong to this type of organization.

An Exostar-Managed Organization has the features below:

- It is registered and managed by Exostar
- Users accept T & Cs only once, after subscribing to their first application
- Typically, it includes independent users who do not belong to a particular organization
- These users need access to multiple sponsor applications
- Users need to be added to an organization by Exostar, the Sponsor Inviter API, or Adoption Module Administrator

Types of SAM Users

The tables below provide information about users by the type of their organization and role designation within SAM:

Table A: Users by the Type of Organization (OMO/SMO/EMO)

Organization Type	User Type
Organization Managed Organization (OMO)	Internal Employees
Sponsor Managed Organization (SMO)	Non-Employee External Users, Partners, Suppliers (users can access applications across sponsors while still belonging to an "Organization")
Exostar Managed Organization (EMO)	Individual Users (users can access applications across sponsors but DO NOT belong to an "Organization")

Table B: User Roles in SAM

Role	OMO	SMO	EMO
User	X		
Organization Administrator (OA) (Scope: Limited to Their Organization)	X	X	
Management Portal Administrator (MPA) (Scope: Limited to Tenancy; a Tenancy could include multiple Organizations)	X	X	
Service Provider Administrator (SPA) (Scope: Limited to Their Applications)	X	X	X
Exostar Portal Administrator* (EPA) (Scope: Full Admin Capability)	X	X	X

*EPAs are Exostar employees that have full admin control over users of all Org Types.

Login Information

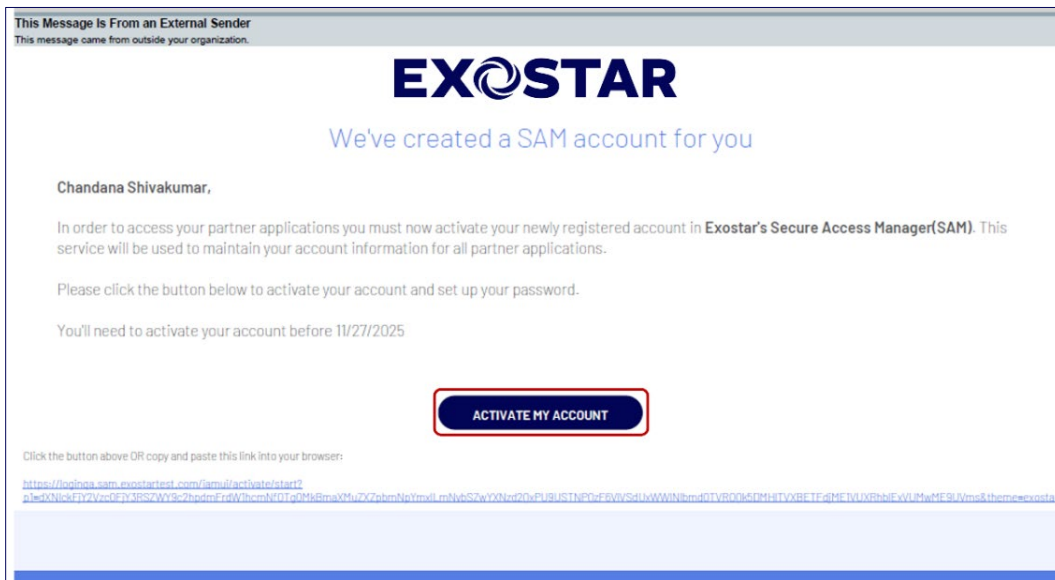
Whether logging into Exostar’s SAM Platform for the first time, returning to the portal, or logging in via EAG, you can access the portal at: <https://secureaccess.exostar.com>.

How to Activate your Account

Upon creation of your SAM Platform account, you receive an email notification containing an activation link. The account activation email is resent twice every 30 days, and new activation notifications supersede older activation emails. Account activation must be completed within 180 days, or the account is deleted. After you begin using your account, you are asked to change your password every 90 days

Follow the steps below to activate your account:

1. You will receive an email invitation to active your account, click the **Activation My Account** button:



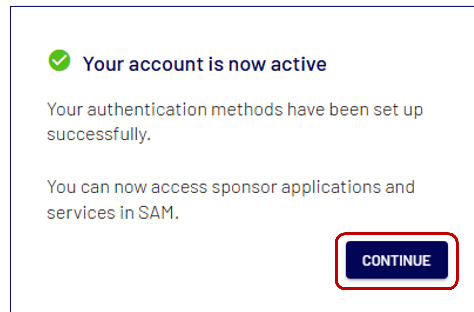
NOTE: You must activate your account by the date in the email, if you do not the link will expire and Exostar will have to resend the activation email.

2. You will be redirected to the Welcome screen, from here click **Let's Get started** button.

3. Create your password and re-enter the new password again in the fields provided. Please make sure you meet all the password requirements. Then click **Next**.

4. Next set up your **Security Questions** and **Answers**. Then click **Next**.
NOTE: To view your answers, check the **Show all Answers** box.

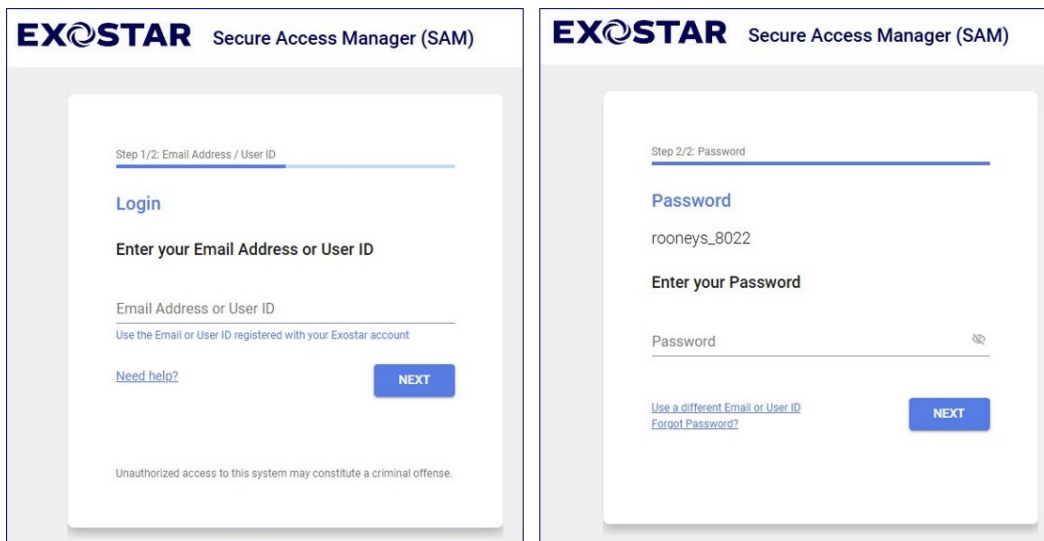
5. After you setup your password and security questions, your account is now **Active**. Click **Continue** to access the SAM portal.



How to Login to SAM Portal

Once you have completed your first-time login and established your password and security questions, all subsequent Logins to Exostar SAM Platform will be as follows:

1. Go to the Exostar SAM Platform login portal: <https://secureaccess.exostar.com>
2. Enter your **Email/User ID**. Then click **Next**.



NOTE: SSO/EAG users have a cookie installed to their browser, which redirects them to their organization Remote Identity Provider (R-IDP). If you delete the cookie or use a different browser, entering the email address redirects you to the proper R-IDP.

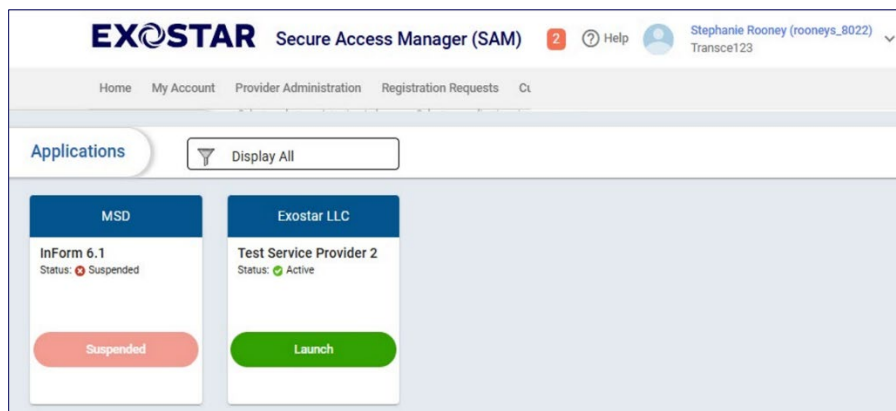
3. Enter your **Password** and click **Next**.

NOTE: If the system recognizes your credential has not been activated, you are prompted to resend the activation email.

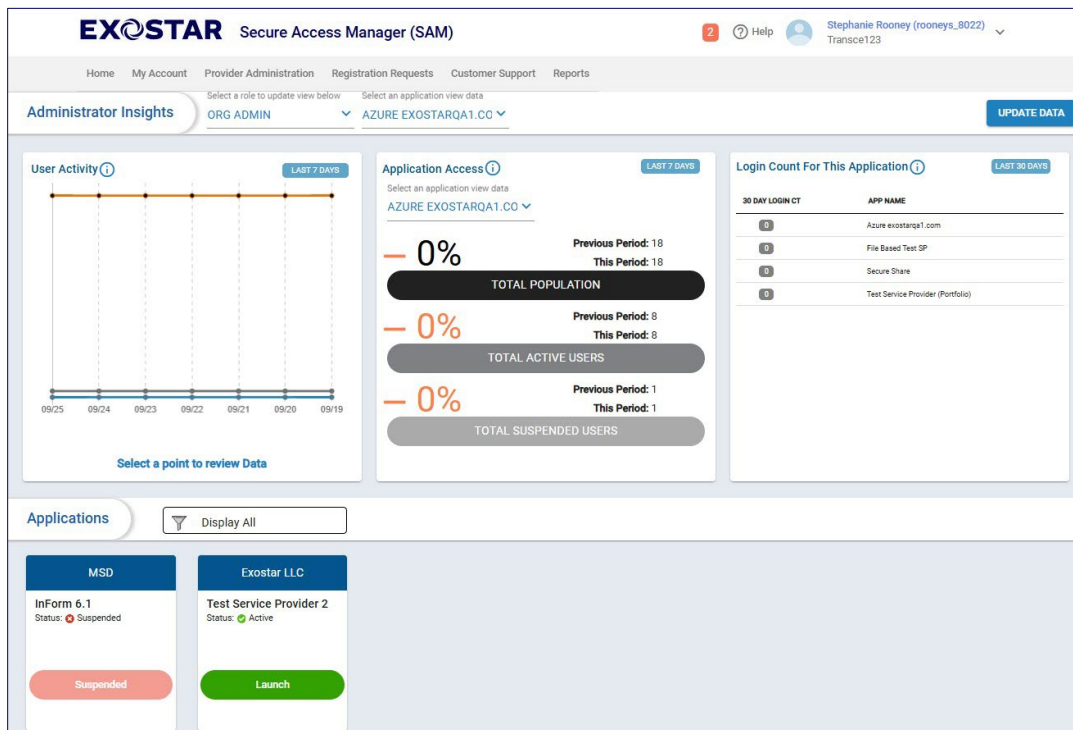
- Upon successful login, the **Exostar SAM Dashboard** displays. From your dashboard as a **User**, you will see your **Applications**. As an **Administrator**, you will see **Administrator Insights** (which will be reviewed in the Administrator sections below).
- In the Applications section you will see the applications your organization is subscribed to. The status will display below the application as either: *Active*, *Suspended* or *Pending Approval*.

NOTE: If you have an Administrator role, the first time you log in you will have to accept the *Terms and Conditions* before your organization and users can access the application(s).

User Dashboard View:



Administrator Dashboard View:



How to Edit your Profile

The **Edit Profile** page allows you to view and modify your user profile information. It also allows you to link your Exostar SAM Platform account to the R-IDP Account.

NOTE: If your account has been linked to your corporate network account via Enterprise Access Gateway (EAG), changes you make to your Exostar SAM profile may be updated upon login by your organization's directory.

To Edit your Account Profile:

1. Log into the Exostar SAM Platform. Select the **My Account** tab, then select **Edit Profile** sub-tab.
2. Review your profile information and update any changes. Click **Continue** to save your changes.

The screenshot shows the 'My Account' page with the 'EDIT PROFILE' sub-tab selected. The page displays the following information:

- Organization: Transce123
- Credential Strength: Username and Password
- User Profile
- User ID: roo
- E-mail: [redacted]@exostar.com
- Role: SP Admin
- Organization Name: Transce123
- Organization ID: EXO111030280
- *Onboarding Sponsor: General
- Title: Select...
- *First Name: [redacted]
- Middle Name: [redacted]
- *Last Name: [redacted]
- Suffix: [redacted]
- Job Title: [redacted]
- Sponsor E-mail: [redacted]
- *Phone: 111-111-1111
- Fax: [redacted]
- *Street Address 1: 2325 Dulles Corner blvd
- Street Address 2: [redacted]
- *City: Herndon
- *Country: UNITED STATES
- *State: Virginia
- Zip/Postal Code: 20171
- *Time Zone: EST
- Restricted Access: Off
- Created Date: 10/26/2020 15:09 PM EST
- Suspended Date From SAM: N/A
- Last Access Date: 09/25/2025 11:49 AM EST

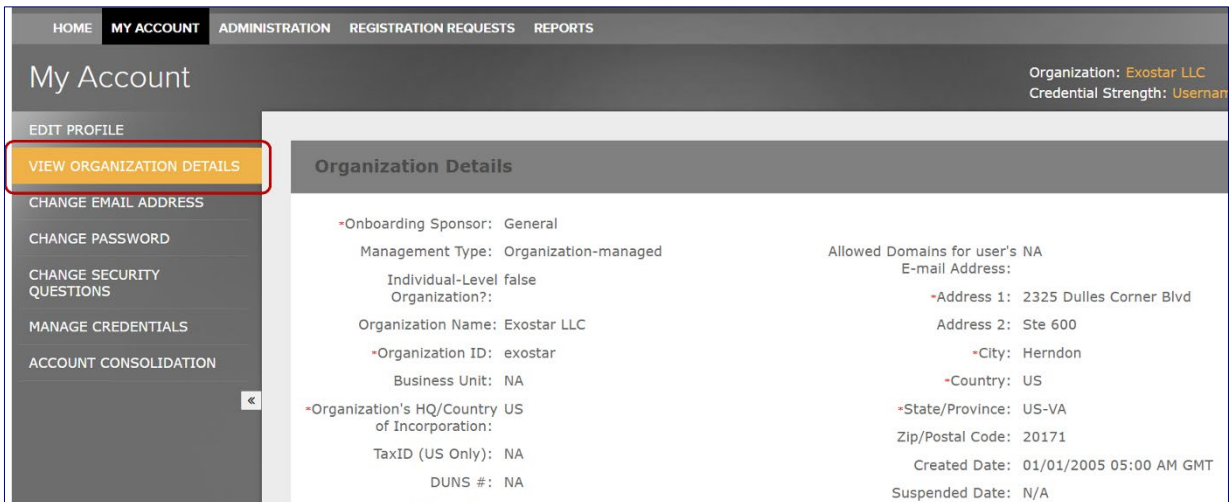
A 'Continue' button is located at the bottom right of the form.

3. A review page will be displayed. Review and verify that the changes have been entered correctly. Click **Submit**.
4. The confirmation page is displayed confirming that changes have been processed. You will receive an email confirming the changes.

View Organization Details

The View Organization Details link provides the user with the following information:

- Organization Details (including names, address, and Org ID)
- Credential Buyer information
- Organization Contact – Org and App Admins
- Active Applications
- Contact information for Application Administrators by application

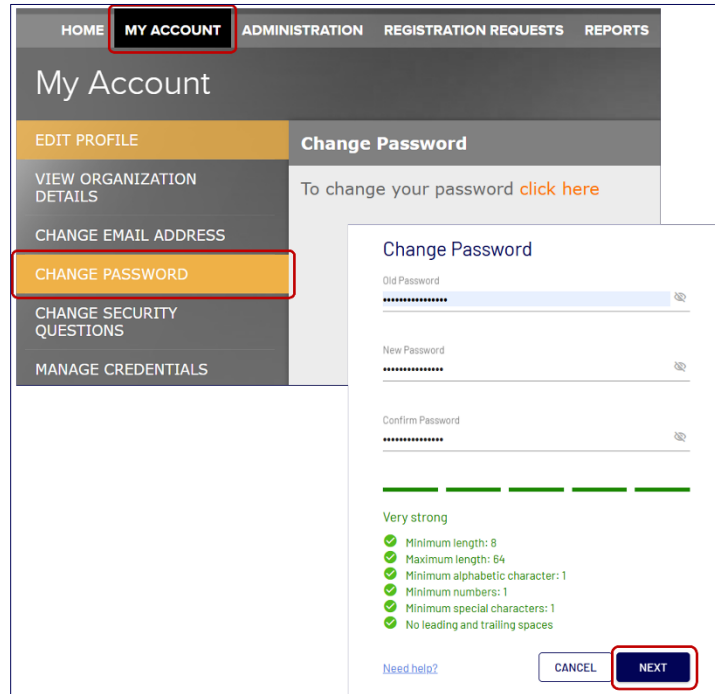


How to Change your Password

Follow the steps below to change your password:

1. Log into your SAM account: <https://secureaccess.exostar.com>
2. From your Dashboard, click **My Account** tab. Then select **Change Password** sub-tab.
3. To change your password, click the link "**click here**".
4. You will be redirected to a new screen "Change Password". Enter your **Old Password** in the correct field.
5. Then enter your **New Password** and **Confirm** your new password in the correct fields.

NOTE: Make sure your new passwords match and meet the password requirements.



REMINDER: Passwords must be a minimum 8 and maximum of 64 characters long. They must include at 1 alphabetic character, 1 number, and 1 special character. Leading and trailing spaces are not allowed. Passwords will expire after 90 days.

6. Click **Complete** to save your new password. You will be redirected to your SAM Dashboard.

How to Update your Security Questions

The Update Security Questions feature allows users to change security questions that have been associated with their SAM Platform accounts. Please note the following regarding your Security Questions:

- Security questions are used when you have forgotten your password, or when you need to change your password.
- The system will only require you to remember two of the four questions when resetting your password.
- Each of your questions and answers combinations must be unique.
- The answers to the security questions are case-sensitive.

NOTE: If your account has been linked to your corporate network account via Enterprise Access Gateway (EAG), you will not be able to see the 'Update Security Questions' tab.

To Update your Security Questions:

1. Log into your SAM account and select **My Account** tab, then click the **Change Security Questions** sub-tab.
2. Find the question(s) you want to update and place a **checkmark** in the **Change** box.
3. Next select the **question** from the **drop-down list** and provide the **answer**.
4. Click **Submit** to finalize your changes. A display message will confirm that changes have been saved (you will also receive an email confirmation).

The screenshot shows the EXOSTAR user interface. At the top, the EXOSTAR logo is on the left, and navigation links for 'Help', 'Customer Service', and a user profile 'Stephanie Rooney' with a 'Logout' link are on the right. Below this is a main navigation bar with 'HOME', 'MY ACCOUNT' (highlighted with a red box), 'PROVIDER ADMINISTRATION', 'REGISTRATION REQUESTS', 'CUSTOMER SUPPORT', and 'REPORTS'. The 'My Account' section is active, showing a sidebar with options: 'EDIT PROFILE', 'VIEW ORGANIZATION DETAILS', 'CHANGE EMAIL ADDRESS', 'CHANGE PASSWORD', 'CHANGE SECURITY QUESTIONS' (highlighted with a red box), 'MANAGE CREDENTIALS', and 'ACCOUNT CONSOLIDATION'. The main content area is titled 'Change Security Questions' and includes instructions: 'Update your existing security questions and answers by clicking the **Change** box, entering the new answer, and clicking **Submit**.' There are four question entries. Question 1 is 'What is your place of birth?' with a dropdown menu showing 'Select...' and a 'Change' checkbox that is checked. A red box highlights the dropdown and the 'Change' checkbox. Below it, the answer field contains 'What is your place of birth?' and is also highlighted with a red box. Question 2 is 'What is your favorite food?' with a 'Change' checkbox that is unchecked. Question 3 is 'What was your first pet's name?' with a 'Change' checkbox that is unchecked. Question 4 is 'What was your first school's name?' with a 'Change' checkbox that is unchecked. At the bottom right of the form, there are 'Submit' and 'Reset' buttons, with 'Submit' highlighted by a red box.

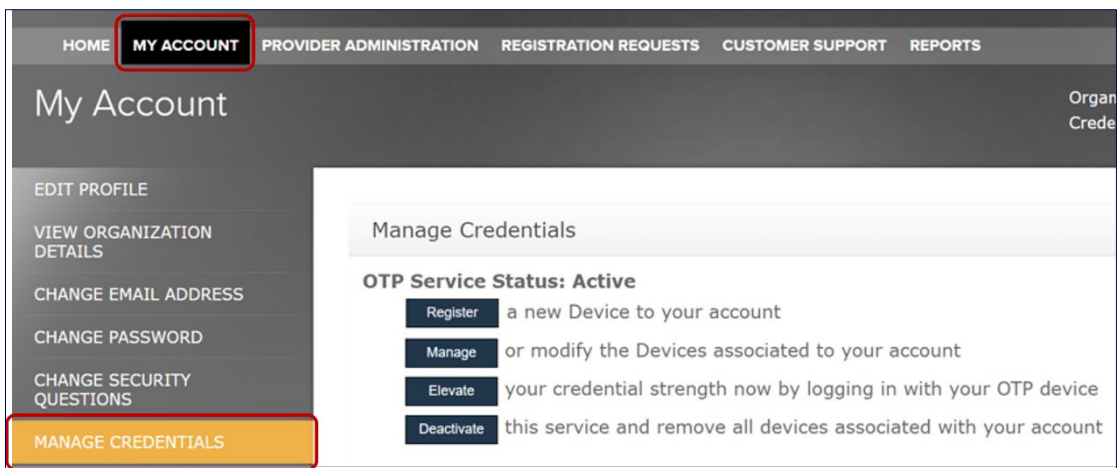
Manage Credentials

One-Time Password credentials are mandatory if you need to access partner applications that require two-factor authentication (2FA). Therefore, if you are attempting to access an application that requires 2FA, you need a security credential.

The **Manage Credentials** link will allow you to register, manage, elevate, or deactivate your OTP credential. The OTP credential may be linked to your account via phone, OTP Hardware, or Exostar Mobile ID. You can only register one credential type to your account.

How to Manage your Credentials:

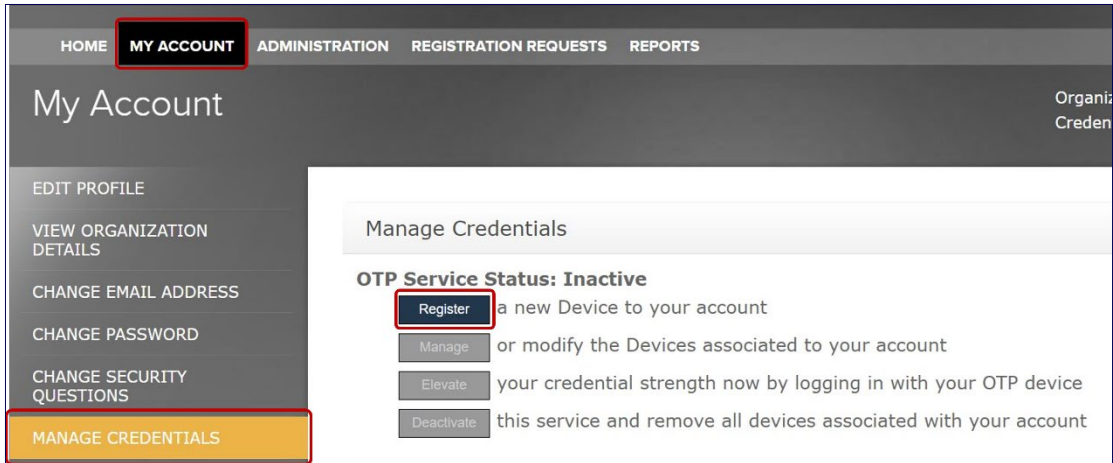
1. Log into your SAM account, then select the **My Account** tab.
2. Next select **Manage Credentials** sub-tab.
3. The following options will display:
 - a. **Register:** Add/register a new device to your account.
 - b. **Manage:** Modify devices associated with your account.
 - c. **Elevate:** Upgrade/elevate your credential strength by logging in with your OTP device.
 - d. **Deactivate:** Remove/deactivate all devices associated with your account. (*Note: this is a permanent action*).



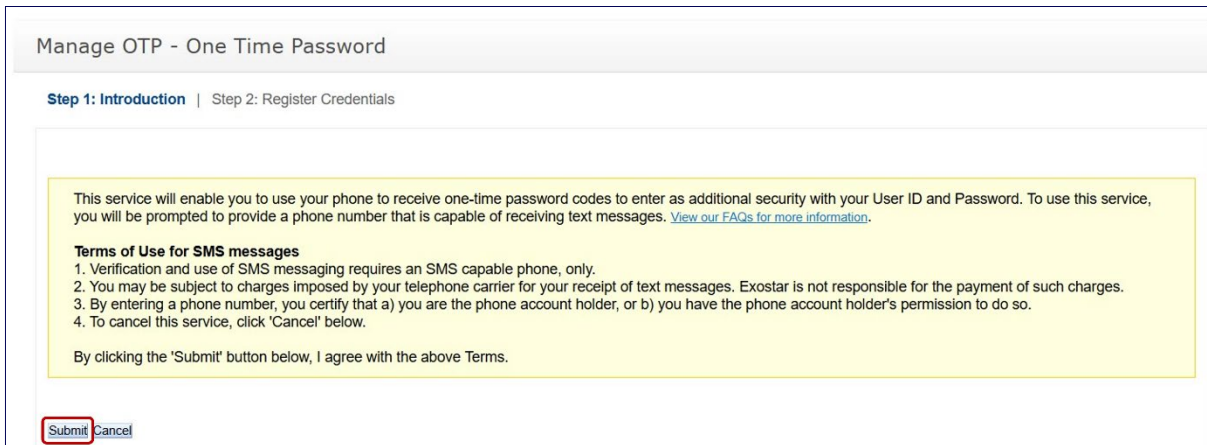
How to Register your Credential

Follow the steps below to register and activate your OTP credential.

1. Login to your SAM account and select the **My Account** tab. Next click the **Manage Credentials** sub-tab.
2. Click the **Register** button to register/add a new device.



3. Complete “**Step 1. Introduction**”, read through the Terms of Use. Then click **Submit** to continue.



4. Proceed to “**Step 2. Register Credentials**”. Choose your **Delivery Method**, select your **Country** from the drop-down menu. Then enter your **Phone Number** and confirm your number again. Click **Send Code**.

Manage OTP - One Time Password

Step 1: Introduction | **Step 2: Register Credentials**

- Shared phone numbers or devices are not permitted.
- If a mobile device is used, you must be in possession of the mobile device before requesting an OTP code.
- If a landline is used, you must be present at the landline telephone before requesting an OTP code.
- Never share OTP codes with anyone to avoid identity theft.
- You may be subject to charges imposed by your telephone carrier for your receipt of text messages. Exostar is not responsible for the payment of such charges.

Register your phone ?

* Delivery Method: Text message to my Phone

How do you wish to receive messages?

* Select Country: UNITED STATES

Select a country instead of entering the full international dialing code in the phone number field.

* Phone Number: +1- [input field]

Enter numbers only. A verification code will be sent to this phone when you click 'Send Code'. It will take a moment for the code to arrive, and it will expire in 2 minutes.

* Confirm Phone Number: +1- [input field]

Send Code Cancel

5. You will receive a text message with **Verification Code** on your mobile phone. Enter the code in the field provided and click **Submit**. (If you did not receive a code, click *Resend Code*).
6. A confirmation message will display that you have successfully registered your phone, click **Complete** to finalize the process.

Manage OTP - One Time Password

Step 1: Introduction | **Step 2: Register Credentials**

You have successfully registered your phone. You may be prompted when you login with your User ID and Password to use this phone to receive a one-time password code for additional security. You can register additional phones by going to the Manage OTP tab in My Account.

Click "Complete" to complete your registration.

Complete

7. You will be redirected back to the Manage Credentials page after successfully completing registration, then click **OK**.

Account Consolidation

This section provides instructions on how to consolidate your accounts in Secure Access Manager (SAM). This feature helps users consolidate their application subscriptions from two SAM accounts into a single account. Application Owners will be informed of the consolidation, the accounts associated with it, and the required tasks to complete consolidation.

There are two account consolidation workflows:

1. The application subscription requires Application Owner approvals to consolidate.



NOTE: The user will lose access to the applications until the Application Owner re-subscribes their Primary Account to the applications.

2. The application subscription doesn't require Application Owner approvals to consolidate.

NOTE: The user will not lose application access during this flow.

Application Owners are responsible for completing the account consolidation tasks depending on the flow for the application they manage.

This is a user-driven solution. The user is the only one that can initiate this process; Application Owners cannot do this on the user's behalf. The user must prove ownership of both accounts using their login credentials. If the user cannot recover the account due to loss of email access, then that account cannot be used for account consolidation.

Important Terms

Please see important term definitions:

- **First Account:** Account the user logs in with to initiate Account Consolidation.
- **Second Account:** Account that is added during the Account Consolidation process.
- **Primary Account:** Account the user wishes to keep.
- **Secondary Account:** Account the user wishes to remove.

Consolidation Limitations

Please note the following limitations to what accounts cannot be used for Account Consolidation (whether accessing the account consolidation tab with these items, or adding the account as the second account):

- **Certificate Accounts**
- **Remote Identity Provider (R-IDP) Accounts** (NOTE: If you unlink or remove the ability to use the native account, and if you wish to benefit from the Remote Identity Provider (R-IDP) status, you must re-link the SAM account to R-IDP Account).
- **Hardware OTP Accounts** (NOTE: If you revoke your OTP Hardware token, this also revokes the identity proofing on the account. You would incur additional costs to set up a new hardware token).
- **Authy™ Accounts**
- **Identity Proofed Accounts** (NOTE: If you revoke, you will incur additional costs to set up a new identity proofing).

Terms and Conditions

It is important to note, if the primary account organization does not have access to the application that is on the secondary account, the user or Organization Administrator must accept that application's terms and conditions again in order to access.

Account Consolidation Process

Before you begin:

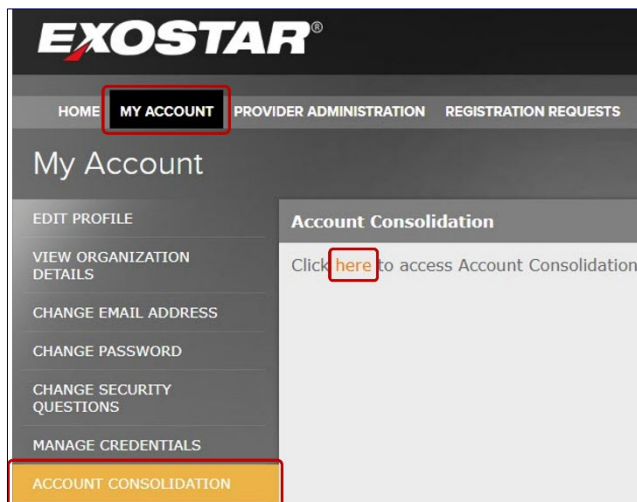
- Only two accounts can be consolidated at a time.
- The account you're currently logged into will be treated as one of the two accounts in the consolidation process.

To begin, you'll need to sign in to the second account you wish to consolidate.

- If you don't remember the password for the second account, you'll need to log out of your current session and go through the account recovery process to reset the password. Once that's done, return here to continue.

To Consolidate your Accounts:

1. From the SAM Dashboard, click the **My Account** tab. Then click **Account Consolidation** sub-tab.
2. Click the "**here**" link to access the Account Consolidation process.



3. Complete “**Step 1: Account Consolidation**” by entering your second account login credentials. Then click **Sign In to Second Account** button.

The screenshot shows a three-step process. Step 1 is active. The title is "Step 1: Account Consolidation - Have more than one account?". Below the title is a sub-header "Before you begin:" followed by two bullet points: "Only two accounts can be consolidated at a time." and "The account you're currently logged into will be treated as one of the two accounts in the consolidation process." Below that is another sub-header "You'll need to sign in to the second account you wish to consolidate." followed by a paragraph: "If you don't remember the password for the second account, you'll need to log out of your current session and go through the account recovery process to reset the password. Once that's done, return here to continue." On the right side, there are two input fields: "User ID/Email Address" with the value "training@exostar.com" and "Password" with masked characters. Below these fields is a blue button with white text that says "SIGN IN TO SECOND ACCOUNT".

4. Next, complete “**Step 2: Choose the Account to keep**” and select your primary account by clicking the radio button. Then click **Consolidate** button.

The screenshot shows a three-step process. Step 2 is active. The title is "Step 2: Choose the account to keep". Below the title is a sub-header "Select the account you want to retain as your primary account. This will become your only account going forward." Below that is a table with columns: "Primary Account", "Secondary Account", "User ID", "Email", and "Subscriptions". There are two rows of data. The first row has a radio button in the "Secondary Account" column selected. The second row has a radio button in the "Primary Account" column selected. Below the table are two buttons: "Cancel" and "CONSOLIDATE". Below the buttons is a small text: "Click 'Consolidate' to proceed Click 'Cancel' to exit".

Primary Account	Secondary Account	User ID	Email	Subscriptions
<input type="radio"/>	<input checked="" type="radio"/>	rooneys_7120	Stephanie.Rooney@exostar.com	
<input checked="" type="radio"/>	<input type="radio"/>	testt_2342	training@exostar.com	

Note: Optional, click Cancel if you do not want to consolidate your accounts.

5. A confirmation screen will display, “**Step 3: Your Account Consolidation Request is now underway**”.

Step 1 Step 2 3

Step 3: Your Account Consolidation Request is now underway

The table below outlines the status of your **application access changes** (originally associated with your secondary account). Some applications may require the **application owner** (e.g., Sponsor) to complete additional steps before you can access the application.

Status Legend

- Waiting for Application Owner to Re-subscribe the Application**
 The Sponsor must reassign access to your primary account.
- Waiting for Application Owner Tasks to be Completed**
 The Sponsor must complete internal updates. You are **not blocked** from accessing applications during this time and can continue to access through your primary account.

What Happens Next:

- Once the required actions are completed by the application owner, your access will be fully restored.
- For urgent access needs, please contact the application owner or support team directly.
- Until re-subscription or application owner tasks get completed:
 - You will not be able to initiate another account consolidation.
 - You will not be able to update your email address.

Application Name	Sponsor	Account Consolidation Status
TSP_4	Exostar LLC	Waiting for Application Owner Tasks to be Completed
TSP_5	Exostar LLC	Waiting for Application Owner to Re-subscribe the Application

6. Once your Account Consolidation is complete you will receive a confirmation email.

Account Disablement

Inactivity on your account may result in the account being suspended or deleted. The following are some reasons why your account may get deleted or suspended:

Status	Reason
Account Activation <u>not</u> Completed for more than 180 days:	If you haven't completed first time login (account activation) for your Exostar SAM Platform account within 180 of account creation, your account will be deleted. If your account is deleted, you will have to re- register in the system.
Application access Suspend:	Each application can set the parameters for the number of days of inactivity that will lead to access suspension. If your application access is due for suspension in 30 days or less, each time you login to your Exostar SAM Platform account, you will be presented with a flash screen to remind you to access the application and the number of days to suspension. To ensure that you do not lose access to the applications you need, it is good practice to login to your Exostar SAM Platform account regularly and access available applications.
Application Access Deleted:	If your application access has been suspended for 'X' number of days as specified by the application owner, your access to the application will be deleted. You will be notified regarding this deletion 30 days in advance.



<p>Active Account Deleted:</p>	<p>If the last active application subscription is suspended, your Exostar SAM Platform account will be suspended 30 days after the application suspension. You will be notified regarding this suspension 30 days in advance. Contact Exostar Customer Support for information on how to re-establish application access.</p>
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