



# Secure Access Manager (SAM) User Guide

October 2025





# Table of Contents

- Document Versions ..... 2
- Introduction ..... 3
- Application Overview..... 3
- Organization Types in SAM..... 3
- Types of SAM Users ..... 5
- Login Information..... 6
- How to Activate your Account ..... 6
- How to Login to SAM Portal..... 8
- How to Change your Password ..... 9
- How to Update your Security Questions ..... 10
- One-Time Password Credential ..... 11
- Identity Proofing ..... 11
- US-Based User Proofing ..... 12
- International-Based User Proofing – Live Video Proofing ..... 15
- OTP Registration and Management ..... 17
- How to Register your OTP Credential..... 17



## Document Versions

Version	Impacts	Date
SAM 4.0	<ul style="list-style-type: none"><li>• Changed the product name from IAM to MAG</li><li>• Updated the text and screenshots for the new login and authentication flow (in the "Login to your Exostar SAM Platform Account" section)</li><li>• Updated the SOTP Client Administrators section</li></ul>	July 2019
SAM 4.1	<ul style="list-style-type: none"><li>• Updated Activation Workflow</li><li>• Create Password Workflow</li><li>• Authentication Workflow</li><li>• Updated Footer</li><li>• Announcement Banner</li></ul>	March 2020
SAM 4.4	<ul style="list-style-type: none"><li>• Password &amp; security questions enhancements</li><li>• Improve account activation process</li><li>• Login screen updates</li></ul>	May 2021
SAM 5.0	<ul style="list-style-type: none"><li>• SP Admin email enhancements</li><li>• Authentication updates</li><li>• Manage Credentials sub-tab</li><li>• Activation email reminders</li></ul>	February 2022
SAM 5.2	<ul style="list-style-type: none"><li>• Link accounts under primary account</li><li>• OTP registration page enhancements</li></ul>	August 2022
SAM 5.3	<ul style="list-style-type: none"><li>• New Application email templates</li><li>• Improved registration and login process</li><li>• New welcome &amp; registration videos</li><li>• Improved Application admin search features</li></ul>	October 2022
SAM 6.0	<ul style="list-style-type: none"><li>• Improve account consolidation to reduce duplicate accounts</li><li>• Enhanced Reporting dashboard for Administrators</li><li>• First Time Login translation in Japanese</li></ul>	July 2023
SAM 6.2	<ul style="list-style-type: none"><li>• New BETA Bulk Upload feature</li><li>• New Admin Insights Dashboard</li><li>• Improved SP Admin requests tasks</li><li>• User profile feature updates</li></ul>	March 2024
SAM 6.6	<ul style="list-style-type: none"><li>• Improved Change Email feature</li><li>• Improved Account Consolidation feature</li></ul>	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
<b>User</b>	X		
<b>Organization Administrator (OA)</b> (Scope: Limited to Their Organization)	X	X	
<b>Management Portal Administrator (MPA)</b> (Scope: Limited to Tenancy; a Tenancy could include multiple Organizations)	X	X	
<b>Service Provider Administrator (SPA)</b> (Scope: Limited to Their Applications)	X	X	X
<b>Exostar Portal Administrator* (EPA)</b> (Scope: Full Admin Capability)	X	X	X
<i>*EPAs are Exostar employees that have full admin control over users of all Org Types.</i>			

## Login Information

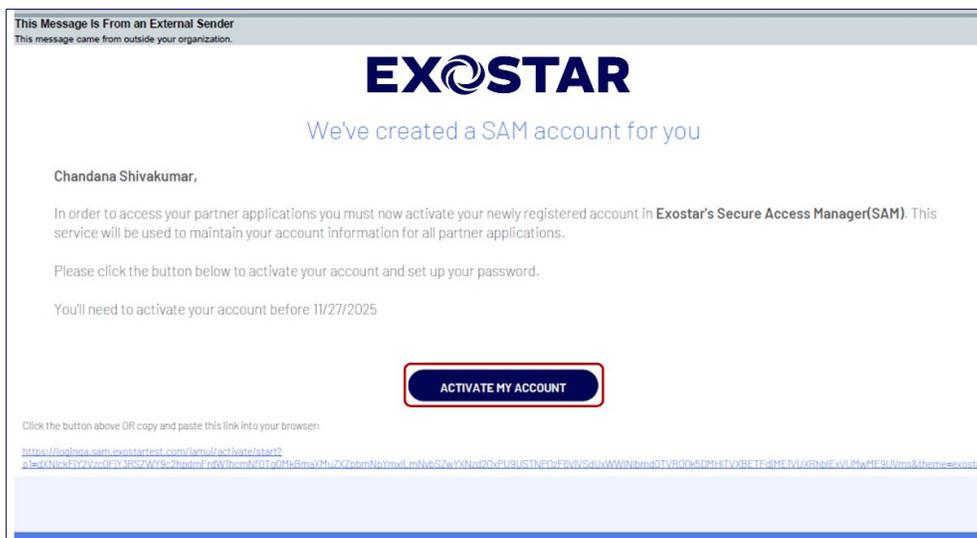
Whether logging into Exostar's SAM Platform for the first time, returning to the portal, or logging in via EAG, you can access the portal at: <https://secureaccess.exostar.com>.

## 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.

**EXOSTAR** Secure Access Manager (SAM)

Hello, Samantha Torretti

Set up your security methods to start using Secure Access Manager.

Let's set up your account

Create your password.      Select your security questions and set your answers.      We'll take you straight to SAM.

**LET'S GET STARTED**

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**.

**Create password**

Create a password to secure your account. The checklist below will help you meet our password strength requirements.

New Password     

Confirm Password     

- Minimum length: 8
- Maximum length: 64
- Minimum alphabetic character: 1
- Minimum numbers: 1
- Minimum special characters: 1
- No leading and trailing spaces

[Need help?](#)      **NEXT**

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

**Set Security questions and answers**

Question 1      Answer to question 1  
What is your place of birth?      \*\*\*\*\*  
Answer is not case sensitive

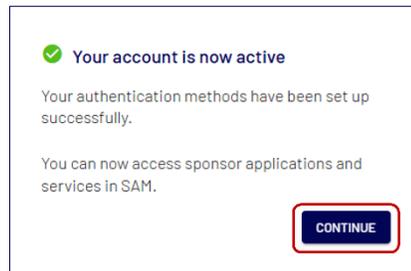
Question 2      Answer to question 2  
What is your favorite color?      \*\*\*\*\*  
Answer is not case sensitive

Question 3      Answer to question 3  
What is your mother's maiden name?      \*\*\*\*\*  
Answer is not case sensitive

Question 4      Answer to question 4  
What was your first school's name?      \*\*\*\*\*  
Answer is not case sensitive

Show all answers      **NEXT**

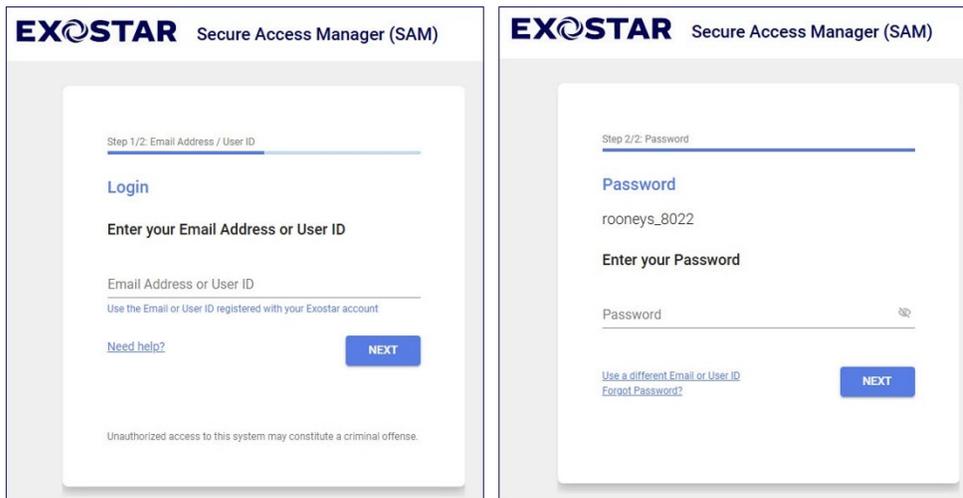
5. After you setup your password and security questions, your account is now **Active**. Click **Continue** to access the SAM portal.



## 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.

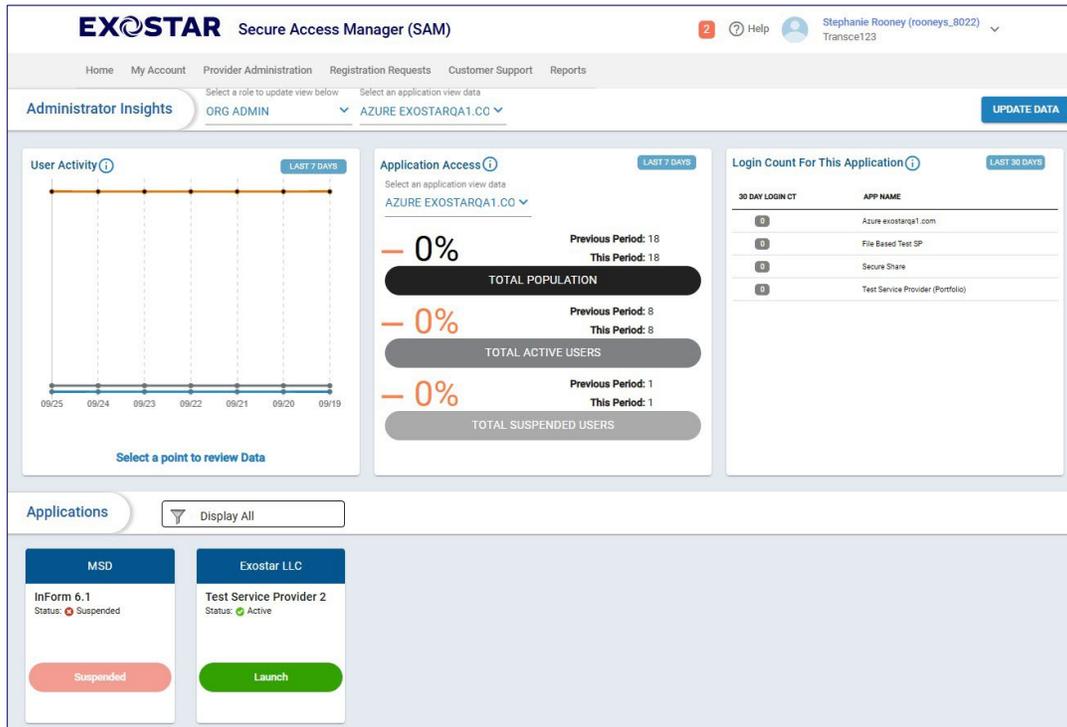
3. Enter your **Password** and click **Next**.

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

4. 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).

5. 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 login you will have to accept the Terms and Conditions before your organization and users can access the application(s).



## How to Change your Password

Follow the steps below to change your password:

1. Log into your SAM account: <https://secureaccess.exostar.com>.
2. Enter your **Email/UserID** and click **Next**.
3. From your Dashboard, click **My Account** tab. Then select **Change Password** sub-tab.
4. 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.

Home My Account Provider Administration Registration Requests Customer Support Reports

My Profile Credential Management Account Consolidation Organization Details

My Profile CHANGE MY PASSWORD

### Change Password

Old Password  
\*\*\*\*\*

New Password  
\*\*\*\*\*

Confirm Password  
\*\*\*\*\*

Very strong

- ✓ Minimum length: 15
- ✓ Maximum length: 64
- ✓ Minimum alphabetic character: 1
- ✓ Minimum numbers: 1
- ✓ Minimum special characters: 1
- ✓ No leading and trailing spaces

COMPLETE

**REMINDER:** Passwords must be a minimum 15 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 **Update Security Questions** sub-tab.

2. Select the questions you want to update, then from the drop-down list select the new question and provide the answer.
3. Update your changes and click **Submit**. A display message will confirm that changes have been saved (you will receive a confirmation email as well).

The screenshot shows the 'My Profile' page with the following elements:

- Navigation tabs: My Profile, Credential Management, Account Consolidation.
- Sub-navigation: My Profile, CHANGE MY PASSWORD, UPDATE SECURITY QUESTIONS (highlighted with a red box).
- Section title: Reset security questions and answers.
- Four security questions with input fields and answer fields (some masked with asterisks):
  - Question 1: What is your place of birth? Answer to question 1: \*\*\*\*\*
  - Question 2: What is your favorite color? Answer to question 2: \*\*\*\*\*
  - Question 3: What is your mother's maiden name? Answer to question 3: \*\*\*\*\*
  - Question 4: What was your first school's name? Answer to question 4: \*\*\*\*\*
- Additional text: Answer is not case sensitive (repeated for questions 2, 3, and 4).
- Checkbox:  Show all answers.
- Button: SUBMIT (highlighted with a red box).

## One-Time Password Credential

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.

## Identity Proofing

Depending on the credential requirement for your application, you may need an OTP credential with or without the identity proofing upgrade. [Identity Proofing](#) is the process of verifying your identity with Exostar. If your OTP credential does not require identity proofing, proceed to the OTP Registration section of this guide to learn how to register your credential.

There are two types of Proofing:

- **US Based Users - Experian Proofing Service:** For US-based users, it is preferred if you proceed through the Experian Proofing process by completing the Credit Bureau-Based Proofing process. During this process, you will be prompted to answer questions about past credit or residential history, provided and verified by a credit bureau.

- **International Based Users - Exostar Live Video Proofing:** International-based users must complete the Live Video Proofing process. During this process, you will meet a Proofing Agent and verify your identity virtually.

## US-Based User Proofing

Exostar uses a Self-Service Mobile Proofing option which is done through Experian (a credit bureau proofing process), which requires you to verify your identity by answering credit bureau-based questions. If you answer the questions correctly, you will complete the proofing process and will be prompted to register your OTP credential.

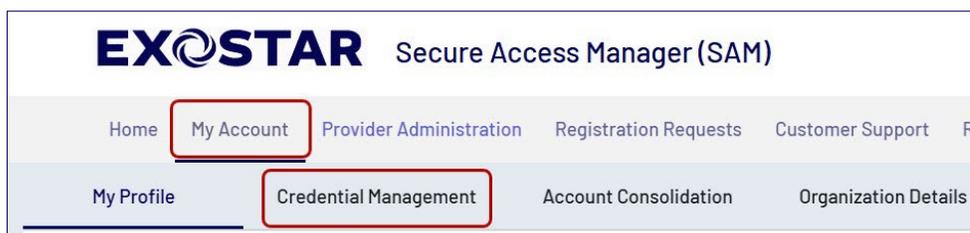
**Note:** Credit Bureau-Based Proofing is only available for users located in the US.

### IMPORTANT:

- If you do not answer the questions correctly, but the credit bureau is *able* to locate you with your personal information (e.g. name and address), you will receive the Activation Code via Postal Mail (USPS).
- If the credit bureau is *unable* to locate you in their database, you will be redirected to the Live Video Proofing process to complete your identity proofing.
- Users *unable* (or unwilling) to complete credit bureau-based questions can opt to complete the Webcam Proofing with a live proofing agent.

Follow the steps below to complete the Self-Service Mobile (Experian) Proofing:

1. Log into your SAM account, then select the **My Account** tab.
2. Next select **Credential Management** sub-tab.



3. You will be redirected to **Select the Country** you will be proofed in. From the drop-down list select **United States**. Then click **Next**.

**Note:** If you are not based in the United States, you will need to follow the Video proofing method below for International users.

Home My Account **Provider Administration** Registration Requests Customer Support Reports

### Select the country where you wish to be proofed

It is important to note that some proofing methods require specific information and may not be applicable to individuals without a US Social Security Number

Proofing Country

CANCEL **NEXT**

4. Next choose your Proofing Method, click the **Proceed with Experian** button.

### Select identity proofing method

Identity proofing is the process used to verify the legitimacy of a user's digital identity. The Exostar proofing is a certified process compliant with the NIST 800-63 standard.  
For further information on this service visit [Exostar OTP policy](#).

**Verify my identity now by Experian! (Recommended)**  
Online identity verification in partnership with Experian

- ~10 minutes
- Only available for **US residents**

**PROCEED WITH EXPERIAN**

**Verify my identity by meeting with an agent later**  
Schedule an ID Proofing session with an agent

- ~10 minutes
- Available **Worldwide**
- You must have access to a webcam

**SCHEDULE APPOINTMENT**

[Return to Dashboard](#)

5. Next **Confirm your Full Name**, then click **Next**.

### Confirm your full name

Please review your full name below, this is essential for our identity proofing.  
If your full name is incorrect, please update it and click 'NEXT'.

First Name  
**Training**

Middle Name

Last Name  
**Account**

CANCEL **NEXT**

6. You will be redirected to begin your proofing session, click the **Start Proofing** button.

The screenshot shows the 'Identity Proofing' welcome screen. At the top, it says 'Welcome to your proofing session' and provides a link to the 'Exostar OTP policy'. Below this, it states 'To complete your application you'll need to:' and lists two steps: 1. 'Provide your personal details' (complete the form and provide your social security number) and 2. 'Answer some questions sent by Experian' (complete the Experian ID Verification questionnaire). At the bottom, there are 'CANCEL' and 'START PROOFING' buttons, with the latter highlighted by a red box.

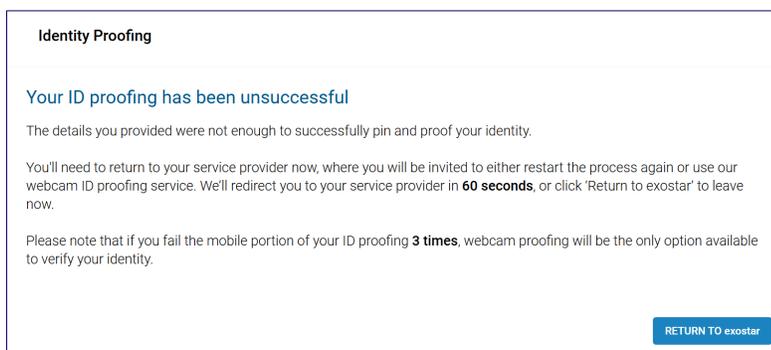
7. You will be asked to **Enter your Personal Details**. Confirm your Legal Name, Enter your Home Address, Birth Date and Last 4-digits of your Social Security number.

The screenshot shows the 'Enter your personal details' form. It includes a disclaimer: 'Exostar does not store or manage this information, it is used only for the purpose of identity verification.' The 'Legal name' section asks to 'Confirm your name as per your government issued ID' and has fields for 'First Name', 'Middle name', 'Last Name', and 'Suffix'. A 'MY NAME IS INCORRECT' button is located at the bottom left.

8. Verify the information you entered is correct, then check the **"I agree to the terms and conditions"** box. Then click the **Continue** button to proceed.

The screenshot shows the terms and conditions agreement screen. It contains a paragraph of text explaining that by agreeing to participate in the identity verification process, the user consents to the use of their personally identifiable information. At the bottom, there is a checkbox labeled 'I agree to the terms and conditions' (highlighted with a red box) and a 'CONTINUE' button (highlighted with a red box).

9. If Experian can verify your identity, you will be redirected to the **Experian ID Verification questions**. Answer these questions correctly and click **Continue**.
  - a. If you answered the questions *correctly* and Experian can successfully verify your identity, you will be redirected to register your OTP credential.
  - b. If you answered questions *incorrectly*, but the credit bureau was able to verify you with your personal information, you will receive an activation code in four (4) business days via postal mail. Use this activation code to activate your credential.
  - c. If the credit bureau is *unable* to verify your identity, the system will redirect you to **Return to Exostar**. Then you will have to verify your identity by completing the Live Video proofing with an agent.



## International-Based User Proofing – Live Video Proofing

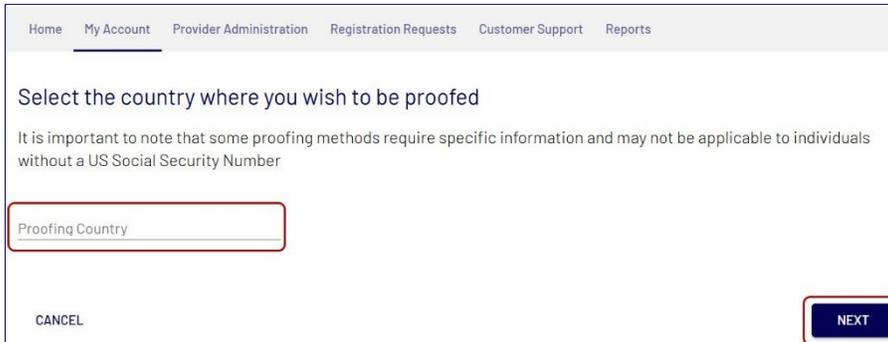
International-based users and US users unable to complete the credit bureau proofing will be directed to undergo **Exostar's Live Video Proofing process**. During the Live Video Proofing, you will be asked to present a **valid government-issued photo identification** to an Exostar Proofing Agent. A valid and unexpired government photo ID is **required**. Non-US nationals must provide a valid and unexpired photo ID that is recognized and accepted by the US Federal Government.

Exostar Live Video Proofing takes place within a secure **Microsoft Teams** meeting. Before your appointment, we highly recommend performing the [Microsoft Teams Test](#) on your machine, as there is limited time during the proofing session to troubleshoot your system configuration. Excessive troubleshooting time during the proofing appointment will likely result in the need to reschedule.

For additional information about webcam proofing requirements, including acceptable documentation and troubleshooting, please visit the [Identity Proofing Resource](#) page.

## Schedule your Proofing Appointment

1. Select your Country from the drop-down list, then click **Next**.



2. Next select your **Proofing Method**, choose *Verify my Identity with an Agent*. Click the **Schedule Appointment** button.

Exostar OTP policy'. There are two main options: 1. 'Verify my identity now by Experian! (Recommended)'. This option is described as 'Online identity verification in partnership with Experian' and includes a box with a clock icon and '-10 minutes' and a globe icon and 'Only available for US residents'. Below this is a 'PROCEED WITH EXPERIAN' button. 2. 'Verify my identity by meeting with an agent later'. This option is described as 'Schedule an ID Proofing session with an agent' and includes a box with a clock icon and '-10 minutes', a globe icon and 'Available Worldwide', and a camera icon and 'You must have access to a webcam'. Below this is a 'SCHEDULE APPOINTMENT' button. At the bottom left is a 'Return to Dashboard' link." data-bbox="164 391 761 627"/>

3. You will be asked to **Confirm your Full Name**, then click **Next**.
4. You will be redirected to Webcam (Live Video) proofing page, click **Start Proofing** to begin the proofing process.
5. To schedule your proofing appointment, select an **available date and time**. Then click **Continue**.
6. Enter your contact information and click **Confirm**.
7. A confirmation page will display with your scheduled appointment time. You will also receive email confirmation as well.

**Note:** An Exostar Proofing Agent will contact you on your scheduled appointment date. The proofing appointment can take up to 30 minutes.

8. You will be contacted by an Exostar Proofer on the day of your appointment.



During your proofing appointment, you will be required to answer a series of “yes” or “no” questions, and provide acceptable, unexpired identification via a webcam to the proofer. Visit the Live Video Proofing Resource page for more information.

Once you successfully complete proofing, the proofing agent will provide you with the activation code. Use this code to activate your credential.

## OTP Registration and Management

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 Register your OTP Credential

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

1. Log into your SAM account and select the **My Account** tab. Next click the **Manage Credentials** sub-tab.
2. Click the **Register** button to register a new device.
3. You will be redirected to Manage OTP – One-Time Password page. Read through the *Terms of Use* and click **Submit** to agree.
4. Next Register your phone. Enter your mobile number, then re-enter your number to confirm.
5. Click **Send Code**. You will receive a verification code on the mobile number you registered.
6. Enter the **Verification Code** in the correct field. Then click **Submit**.
7. A confirmation page will display you have successfully registered your phone. Click **Complete** to finish the registration process.
8. Click **OK** to return back to the Manage Credentials options.

You can add up to 3 phone numbers for your account by clicking the **Manage** button. To Upgrade your credential, click the **Elevate** button. Or click **Deactivate** button to unregister a device from your SAM Account.