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## Document Versioning

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Document Overview
This role-based user guide outlines various functionalities and actions for Supplier Users and Administrators in SecureForms. This document discusses:

- SecureForms Access
- Roles, Permissions, and Responsibilities
- How to Edit and Submit an Assigned Form
- Reassign an Assigned Form
- Renew an Assigned Form
- Viewing Details of Form Assignment
- Viewing and Printing Submitted Forms
- Manage User Roles of Users in Supplier Org (Admin)

SecureForms Summary
SecureForms focuses on providing Raytheon the ability to invite suppliers to complete forms electronically, which then become available to everyone at Raytheon. The system also ensures suppliers cannot submit the form until all required forms are completed. It contains built-in data collection processes and workflows, automated features and services that allow Buyers (Raytheon Users) to continuously review and make future decisions on supplier relationships.

Exostar’s Managed Access Gateway (MAG)
Exostar’s Managed Access Gateway (MAG) is a consolidated portal providing identity and access management as a cloud service for the Aerospace & Defense industries. Raytheon Secure Forms is accessed through MAG.

You are required to have a MAG user account and an approved security credential to access Raytheon Secure Forms.

Please see the Accessing Raytheon SecureForms section in this guide for access instructions and SecureForms credential requirements.

MAG Account Information
If you do not have a MAG user ID, please work with your organization’s MAG Organization Administrator. If you have accessed your MAG account and the status of Raytheon SecureForms is pending Application Administrator approval, please work with your organization’s SecureForms Application Administrator.

If you do not know who the SecureForms Application Administrator is for your organization, follow the instructions below:

1. After logging into MAG, click the My Account tab.
2. Click **View Organization Details**.
3. From the **Organization Details** page, scroll to the **Application Administrators** section.
4. Locate Application Administrator(s) for SecureForms (SecureForms displays in the Application column).

You can also contact Exostar directly to inquire who the administrator is. If there is no administrator, contact your organization’s Organization Administrator (Organization Administrator displays from View Organization Details page).

If there is no Organization Administrator or if the Organization Administrator is no longer with your organization, submit a change authorization form at [https://my.exostar.com/display/TE/Change+Requests#ChangeRequests-RequestingChange](https://my.exostar.com/display/TE/Change+Requests#ChangeRequests-RequestingChange) to have the role assigned to your account or to someone else in your organization.

For additional information and task instructions for users with the MAG Organization and Application Administrators roles, please reference [my.exostar.com](https://my.exostar.com).

If your organization does not have an Exostar MAG account, you must be invited by Raytheon to access SecureForms. The invitation is sent via email and must be completed by the point of contact designated by Raytheon. For assistance with completing organization account registration, please visit [https://my.exostar.com/display/TE/Account+Registration+Assistance](https://my.exostar.com/display/TE/Account+Registration+Assistance).

**Accessing Raytheon SecureForms**

To access Raytheon SecureForms, log into your MAG account with an approved multi-factor credential such as a Phone-based OTP with Proofing Upgrade. If you also work with other Exostar partners such as Boeing or Lockheed, please review the information at [Alternate Credentials](https://my.exostar.com/display/TE/AlternateCredentials) to determine what type of credential you need.

If you already access **Raytheon SCP (RSCP)** or **Raytheon Supplier Portal** via Exostar’s MAG, you have the proper credential required to access SecureForms. If you do not have the proper credentials, please visit the **Raytheon 2FA** section of [my.exostar.com](https://my.exostar.com) for additional information.
1. Using Internet Explorer, log into MAG with your approved multi-factor credential to access Raytheon SecureForms.

![Image of MAG login screen]

2. Once you log into your MAG account with your multi-factor credential, verify the credential strength in the upper right hand corner of your screen. The credential type that you have logged in with displays in the **Credential Strength** field.

   The below example illustrates what displays if you have logged in with a Federated Identity Service (FIS) Hardware Certificate.

   ![Image of credential strength example]

   If the credential strength displays **Username and Password**, you have logged in with username and password only. You will need to log in with your registered multi-factor credential (e.g. Phone OTP, OTP Hardware Token, FIS MLOA Hardware Certificates, etc).

3. After confirming credential strength, access **Raytheon SecureForms** from listed applications found on the **Home** tab. Click **Open Application** to access Raytheon SecureForms.

   ![Image of Raytheon SecureForms application]

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**Note:** If a different application status displays (other than Open Application), please refer to the MAG application status matrix [here](#).

If you see **Login Requirements Not Met**, you have not logged in with the correct credential strength to access the application. You need to login with the required credential before accessing the application.

[Raytheon SecureForms Login Requirements Not Met - Help]

If you do not see Raytheon SecureForms on your **Home** tab view, please contact Exostar Customer Support for assistance at 703-793-7800, or create an online support case via [https://my.exostar.com/display/TE/Support](https://my.exostar.com/display/TE/Support).

**SecureForms Roles, Permissions and Responsibilities**

Suppliers have two different roles in SecureForms. Each role has both common and specific functions in the application.

**Supplier Users** can execute the following functions:
- View any forms assigned to them
- Reassign forms assigned to them to other supplier users
- Edit forms assigned to them
- Submit forms assigned to them
- Download, save, and print forms assigned to them

**Supplier Administrators** can conduct the same functionalities as above in addition to:
- Manage Users
- View all forms assigned to their Organization
- View any current form in org that are currently in progress
- Assign any forms assigned in organization to any supplier users

**Login**

Previously, suppliers accessed SecureForms via the Raytheon Supplier Portal. Any attempt to open SecureForms in the portal now prompts a pop-up message stating, “SecureForms has been upgraded and is now available from your Exostar account homepage.”

If you have access to other Raytheon applications in MAG, the same MAG login process to now applies to SecureForms.

Follow the steps below to log into MAG and access Raytheon SecureForms.

1. Go to [https://portalvs.exostar.com](https://portalvs.exostar.com) and sign in with your 2FA credential to redirect to the **Applications** page.
2. Under the **Company-Application** column, locate **Raytheon SecureForms**. Click **Open Application**.

3. Each time a user logs into SecureForms, or if their current session times out, they must accept the **Export Control Acknowledgement**. Check the box and click **Accept**.

![Export Control Acknowledgement](image)

**Manage User Roles**

Supplier Administrators have the ability to modify roles of any users in their organization. Follow the steps below to make changes to users on your organization:
1. From the Dashboard, click the X User icon on the bottom right side of the screen.

![Dashboard screenshot](image1)

2. On the Organization Profile screen, locate the user and click Manage.

![Organization Profile screenshot](image2)

**NOTE:** Your company information (name, address, etc.) on the CR-003 is pre-populated from one or more databases which are not automatically updated from the completed form. If changes need to be made in our Vendor Master, request the buyer you work with submit a Change Request for the Enterprise Supplier Data Management (ESDM) application.

To update the information in Exostar’s Managed Access Gateway (MAG), someone from your company with the Organization Administrator role must submit a Change Authorization request. The form can be accessed [here](#).
3. The **Role Management** screen displays. From this screen, Supplier Administrators can make the following changes:
   a. Update User Roles
   b. Activate/Deactivate User Status

![Role Management Screen](image)

**NOTE:** If a user is deactivated in SecureForms, they are not deactivated in Exostar’s MAG. To remove a user from MAG, contact the MAG organization’s Organization or Application Administrator.

**Dashboard**

Users can conduct various administrative and functional tasks from the Dashboard. On the top right of the page, the system displays the user’s **Name** and **Role**. Click the **User Icon** to display a dropdown containing different pages to view.

![Dashboard](image)
My Profile displays the Login ID, Organization Name, Application role, and user’s Contact Information.

The Logout prompts a popup Logout Confirmation screen. Click Yes to end your session or Cancel to resume.
The body of the dashboard contains queues (tabs) with form requests in various workflow statuses. The tabs are listed as follows:

- **Pending**: Form requests sent by Raytheon to an assigned supplier user, but not yet completed by the supplier.
- **Completed**: Forms completed by suppliers and submitted to Raytheon.
- **Cancelled**: Forms sent to suppliers and later cancelled by Raytheon.
- **PIM Forms**: If the supplier user has a Partner Information Manager (PIM) account and has forms requested by Raytheon, those forms are viewable in SecureForms.

**NOTE**: PIM forms are not editable in SecureForms. Users are redirected to PIM if any modifications need to be made to PIM forms.
The **My Organization** section contains supplier account details.

![My Organization Section](image)

The **My Links** section contains a link for **Raytheon Supplier Resources** that sends users to a Raytheon resource page dedicated to their Suppliers.

![My Links Section](image)

The primary purpose of the **Communication Board** is to allow supplier users to ask supplier administrators questions within SecureForms.

![Communication Board](image)
To post on the Communication board, click the Add New Question button. You are prompted to enter your question in a pop-up box. Once you enter the Subject and Body of your message, click Save.

NOTE: Supplier Administrators can see all posted questions/messages added by any users in their organization. Supplier Users can only see messages they posted. Raytheon is unable to respond to the messages on the Communications Board.

Banner Messages
Banner Messages contain information that needs to be communicated to suppliers by Raytheon. They are located at the top of supplier pages as shown below.

NOTE: Click View More to expand the message when there is more text than the system displays in the consolidated view.
Forms
SecureForms houses different forms created and assigned to suppliers by Raytheon. This section of the User Guide outlines how Suppliers view, edit, and respond to forms.

How to Edit and Submit an Assigned Form
To edit and submit an assigned form, follow the steps below:

1. From the Supplier Dashboard, click the form name from the Form List page

![Form List Example](image)

**NOTE:** The Form Progress bar indicates the percent of progress in populating the form. The Request Status bar indicates the percent of progress in completing the request. (A request begins when one to complete a form is submitted and ends when the form is submitted).

2. On the Form Details screen, click the Edit icon on the bottom right side of the screen.

![Form Details Example](image)
3. From the **Edit Form** screen, make the desired updates. Once you complete your modifications, click the **Submit Form** button to send your form to Raytheon.

4. Clicking the **paper icon** in the top right corner will open a list of sections that can be navigated to without scrolling through every screen.
Business Activity and Type Definitions

Question A.1. Part III (h) asks that you identify the Business Activity of your organization.

For the purposes of this form, business activities are defined as the following:

- **Rentals**: Real Estate rentals, machine rentals
- **Royalties**: Intangible property such as patents, copyrights, trade names and trademarks
- **Consultant/professional fees**: Fees to accountants, architects, contractors, engineers, referral fees or payment for services
- **Medical/Healthcare**: Physician or other supplier or provider of medical or healthcare service
- **Services Only**: Rentals, calibration, integration, counterfeit screening, repairs, et cetera

Question A.1. Part III (i) asks that you identify the Business Type of your organization.

- **Manufacturer/Authorized Distributor**: Companies that design parts and products, hold intellectual property rights, manufacture (or consigns manufacturing), and may authorize or license the sale of the product to other companies. These companies are also referred to as Original Manufacturer (OM), Original Component Manufacturer (OCM), or Original
Equipment Manufacturer (OEM), and are an authorized distributor for parts they manufacture.

- **Manufacturer/Non-Franchised Distributor** - Companies that design parts and products, hold intellectual property rights, manufacture (or consigns manufacturing), and may authorize or license the sale of the product to other companies. They are an authorized distributor for parts they manufacture. These companies also function as a non-franchised distributor for other parts and/or products.

- **Non-Franchised Distributor Only**: A Supplier who is not authorized or under the oversight of the part’s OM. These companies typically do not offer an item with the full manufacturer’s warranty. These companies are also referred to as Independent Distributors, Non-Authorized Distributors, Non-Authorized Suppliers, or Brokers.

- **Authorized/Franchised Distributor Only**: A distributor with which the OM has a contractual agreement to stock, repackage, sell and distribute its product lines. Authorized companies are also referred to as Authorized Suppliers. AN AUTHORIZED DISTRIBUTOR DOES NOT SELL AND DISTRIBUTE PARTS THAT THEY ARE NOT AN AUTHORIZED SUPPLIER FOR.

- **Both Authorized/Franchised and Non-Franchised Distributor**: A Distributor that sells and distributes parts for which they are a franchised distributor/authorized supplier, and also sells and distributes parts for which they are NOT a franchised distributor or authorized supplier.

- **Consultant**: A person, partnership, association, or company retained by Raytheon (the “Company”) for specialized skills, experience, abilities, and provide either (a) advisory services (counsel or recommendations) to enhance business development, technical, financial, management or other capabilities that can contribute authoritatively to the internal Raytheon enhancements of Raytheon business solutions.

- **Service**: A supplier that provides a service to Raytheon. (example: Rentals, Calibration, Integration, Counterfeit screening, Repairs, etc).

- **Software**: A supplier that provides Software or Software services for Raytheon.

- **Construction**: A supplier that has activities associated with buildings, structures or other types of real property such as land, roads and or parking lots.

- **Testing**: A supplier that provides Testing Services to Raytheon.

All suppliers that certify as Small in A.1. Part III(j) must also provide information in Question A.3.1. as follows:

- (1) Which size standard defined by the Small Business Administration (SBA) applies based on their Number of employees and Annual Revenue (in millions)

- (2) All NAICS codes for which the supplier represents itself as a small business concern.
- To aid in identifying the most common NAICS codes that Raytheon procures for, review the tool located here.

The information in Section C is prepopulated and cannot be edited here. The Signature and Signatory names are those of the person who logged in and cannot be changed. The company name, address and emails can be edited in Section A.1. Part I. and will then be reflected here.
A list of any required incomplete fields will open and clicking the link will navigate directly to those that need to be filled out.

5. Once all required fields are complete, click **Submit Form.** On the **Form Submission Confirmation** pop-up, confirm the form should be submitted.
6. After clicking **OK**, a further confirmation displays and the person that signed the form receives an email as well.

![Confirmation](image)

**NOTE:** If you are not ready to submit your form and would like to save it in its current state, click the **Save & Exit** button.

**Reassign an Assigned Form**

Supplier Users can assign any form assigned to them, to any other user in their supplier organization. Supplier Administrators can reassign any form assigned to the organization, to any user of the organization.

In order to reassign the form to a user that does not already have access to SecureForms for that organization, the Supplier Administrator must first invite them to SecureForms. If the user does not have an Exostar MAG account, this can be done from the **Administration** tab by clicking **Add New User** and following the prompts to invite the person to activate an account in SecureForms and any other application they need access to.

If the user has a MAG account, they can click **Request Access** to SecureForms, and wait for the administrator to approve the request and then reassign the form to them.

It is not possible for multiple users to have accounts with the same email address under the same organization. For example, John Smith and Beth Jones cannot have accounts, both of which use the email address sales@acmecorp.com. The preference is accounts should be set up under a person’s email address instead of a ‘generic’ one such as Sales or Customer Service.
To Reassign an Assigned Form:

1. From the Form Dashboard, go to the **Pending Forms** tab. Click the white arrow next to the form name to expand options. Click **Reassign**.

2. The **Assign to User** dropdown displays. Select the user and click **Save**.

3. The new assigned user receives an email notification advising they were assigned a form in SecureForms.

**NOTE**: Forms can also be reassigned from the **Form Details** page. Click the **Reassign** button and follow step two above.
Renew an Assigned Form

A supplier user can renew a form assigned to them when there are no other active or pending requests for the form, and a completed version of the form already exists. If these conditions are not met, the Renew link does not display.

1. From the Form Dashboard, go to the Completed Forms tab. Click the white arrow next to the form name to expand options. Click Renew.

2. A request for the form to be Renewed is created and placed on the Pending Forms tab.

NOTE: The Form Progress bar indicates the progress in populating the form as a percentage of the number of questions that have been answered. The Request Status bar indicates the percent of the Request that has been completed. Requests begin when a user is assigned to complete a form and end when the form is submitted.

Upon renewal, because the form is pre-populated from the previous submission, Form Progress may be 100% (all questions have been answered) but Request Status can be 80% (form completed but not submitted). An exception to Form Progress during renewal may exist if questions were added since the last time a form was submitted and therefore cannot be pre-populated.

When the renewal process is initiated either by the supplier or by a Raytheon user, the Form Progress will show 100% due to the fact that the form prepopulates with answers from the previous submission.

3. Changes can be made as needed and then the form can be submitted by following the steps above.
Viewing Form Details
The Form Details page displays supplier attributes, form details, and allows Supplier Users to print the latest submission and all previously completed submissions (Administrator Only) of the form they are viewing.

Assignment History
The Assignment History table outlines user information and dates for each instance the form was assigned or reassigned to a specific supplier user.

Revision History
The Revision History outlines the following information for each form request of the particular form previously sent to Raytheon by the supplier (User/Administrator) or organization (Administrator):

- Revision Number
- Type
- Date

Printing Forms
Supplier Users can only see and download completed (i.e. submitted) forms and forms they saved in draft state. Supplier Administrators can see all versions of any form assigned to their organization in any state.
To Print Last Submitted Form:

1. Go to the **Download** portion of the **Form Details** screen and click the **PDF icon** next to **Latest Submitted Revision**.
2. To view and print any other previously completed or draft forms, go to the **Revision** column of the **Revision History** table, and click the **PDF icon** next to any form that meets the criteria.

**Assistance and Support**

For additional assistance, contact Exostar Customer Support at 703-793-7800 or create an online support ticket at [https://my.exostar.com/display/TE/Support](https://my.exostar.com/display/TE/Support).

For further information about why completion of a form is needed or if you need to be invited to SecureForms, contact your Raytheon buyer.