EXOSTAR® UNIVERSITY

Secure Access Manager (SAM)
Account Consolidation User Guide
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CONTENTS

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ACCOUNT CONSOLIDATION OVERVIEW

This guide provides information and instructions on the Account Consolidation feature 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. It is important to note, multiple Application Owners may be involved in the process depending on the user's application subscriptions. Each Application Owner will receive an email notification to complete tasks, if necessary.

There are two account consolidation flows:

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

To begin the account consolidation process:
1. Navigation to the SAM login screen.
2. Input your **Email Address** or **User ID**. Click **Next**.

Login

Enter your Email Address or User ID

Email Address or User ID

Use the Email or User ID registered with your Exostar account

Need help?   **NEXT**

Unauthorized access to this system may constitute a criminal offense.

3. Input your **Password**. Click **Next**.

4. Navigate to the **My Account** tab → **Account Consolidation** subtab.

NOTE: The Account Consolidation page displays the first account details (User ID and Email Address) you wish to use for the consolidation along with application subscriptions.

5. Click the **Add Account** button to add the second account you wish to use for consolidation.

6. Input credentials for the second account. Click **Add Account**.

NOTE: Please see the Authentication Error Messages section below for possible issues during this portion of the process.

7. Once you successfully login to the second account, the **Account Consolidation** page displays both account's details and application subscriptions. Place a checkmark for the desired **Primary Account**.

NOTE: The page updates to display the check-marked, **Primary Account**, the account the user wishes to keep, and the system recognizes the unchecked account as the **Secondary Account,** the account the user no longer wishes to use.

8. Click the **Consolidate** button to move application subscriptions from the Secondary Account to the Primary Account, depending on application configuration.

NOTE: The **Cancel** button removes the second account, and the user starts the process over.

9. If you selected to make the **First Account** as the **Primary Account**, the following **Warning Message** displays. Review and click **Continue** to proceed with the consolidation. **This action is irreversible and deactivates the Secondary Account.**

NOTE: The **Cancel** button returns the user to the previous page, where both accounts are present.

⚠️ **WARNING!**

Account Consolidation will consolidate the subscriptions from secondary account to the primary account as described below:

The subscription that doesn't require approval to consolidate, the system will unsubscribe it from the secondary account and subscribe it to the primary account. You can continue to access it using the primary account credentials (Email/User ID and password).

The subscription that requires approval to consolidate, the system will unsubscribe it from the secondary account and inform the Application Owner of your request to consolidate it under the primary account. You will not have access to the application until Application Owner re-subscribes you to the application.

Upon completion the secondary account will be deactivated.

This is irreversible.

Click **"Continue"** to consolidate and complete this process.

Click **"Cancel"** to cancel and exit this process.

Cancel   Continue

NOTE: Once you click **Continue**, if you chose the first account as your Primary Account, a confirmation screen displays status information:

- **Waiting for Application Owner to re-subscribe to the application**: This requires the Application Owner to re-subscribe the application to your Primary account.
- **Waiting for Application Owner tasks to be completed**: This requires the Application Owner to fulfill their respective tasks to successfully complete the Account Consolidation. **Account Consolidation will remain unavailable until the tasks are completed.**

Account Consolidation

You have successfully completed Account Consolidation.

The Account Consolidation status for each application is displayed on the table below.

The application with Account Consolidation status 'Waiting for Application Owner to re-subscribe the application' requires Application Owner to re-subscribe the application to your primary account.

The application with Account Consolidation status 'Waiting for Application Owner tasks to be completed' requires Application Owner to fulfill their respective tasks to successfully complete the Account Consolidation.

Account Consolidation will remain unavailable until these tasks are completed.

Application Name	Sponsor	Account Consolidation Status
Test Service Provider 2	Exostar LLC	Waiting for Application Owner tasks to be completed.

10. If you selected the **Second Account** as the **Primary Account**, the following **Warning Message** Displays. Review and click **Continue** to proceed with the consolidation. Click **Cancel** to disregard.

NOTE: Once you click **Continue**, if you chose the second account as your Primary Account, the system logs you out because you started the consolidation process with the first account, which has been deactivated.

EMAIL EXAMPLES

Once you begin the account consolidation process, depending on the application flows for the subscriptions under the Secondary account, you receive an email notification of the unsubscribed applications.

Dear Samantha Torretti,

The following applications have been unsubscribed from the secondary account (User ID: torrettis_4493, Email: samantha.torretti+_839405038@exostar.com) as part of account consolidation request.

EngageZone.msd.com

Your sponsor has been informed of your request to consolidate EngageZone.msd.com under the primary account (User ID: torrettis_3190, Email: samantha.torretti+_839305949@exostar.com)

You will not have access to the applications listed above until your sponsor subscribes them to the primary account.

Please contact the sponsor customer support for further information.

Thank you.
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8

This section provides screenshots on possible error messages that display during the authentication process.

Consolidation in Process

Error Message: Unable to use the account due to an ongoing Account Consolidation involving this account.

Currently Logged-In

Error Message: To facilitate Account Consolidation, please log in with a different account, as it is not feasible to proceed with the Account Consolidation using the same account.

9

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Deactivate/Suspend Account OR Wrong Login Information

Error Message: Your User ID/Password combination was not recognized. If you have forgotten your User ID/Password, you will need to log out and recover it from the SAM login page.

Error
Your User ID/Password combination was not recognized. If you have forgotten your User ID/Password, you will need to log out and recover it from the SAM login page.

Account Consolidation

Log into the second account you wish to use for the Account Consolidation.

If you do not know the password or the password has expired, you will need to recover the password before you can continue.

Click **Cancel** to return to the previous page. Click **Add Account** once you enter the Email/UserID and password.

*User ID / E-mail Address: testtesttest@yahoo.com

*Password: •••••

[Cancel] [Add Account]