

# Secure Access Manager (SAM) Account Consolidation Service Provider Administrator Guide October 2023





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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. Service Provider Administrators (SP Admins) will be informed of the consolidation and the accounts associated with it.

SP Admins are responsible for completing the account consolidation tasks depending on the flow for the Service Provider (SP) they manage.

### REQUIRES SP ADMIN APPROVAL

As a high-level overview for the process that DOES require SP Admin approval for consolidation:

1. SP Admins receive an email notifying the user has done an Account Consolidation.

**NOTE**: This email notification includes **Primary Account** and **Secondary Account** details, as well as any applications that need to be re-subscribed. Please see the <u>Email Template</u> section below for more detail.

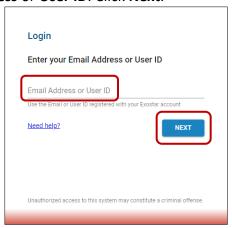
2. SP Admins must re-subscribe the application to the user's Primary account in SAM.

**IMPORTANT!** The user will not have access to the application until SP Admin subscribes the application to the user's primary account.

### MARK TASKS COMPLETE

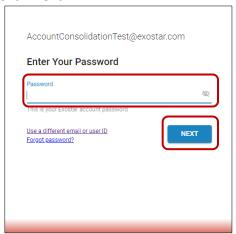
To mark the Account Consolidation tasks as complete:

- 1. Navigate to the **SAM login screen**.
- 2. Enter your Email Address or User ID. Click Next.

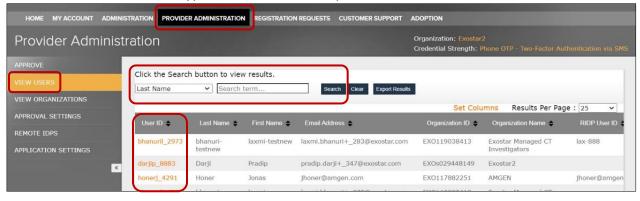




3. Enter your Password. Click Next.

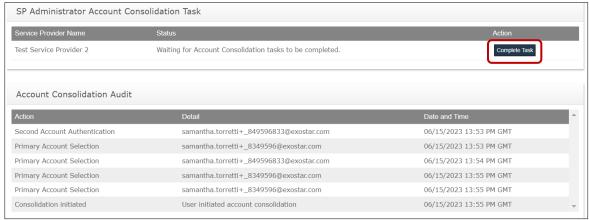


- 4. Click the **Provider Administrator** tab → **View Users** sub-tab.
- Enter the User ID or Email Address of the user's Primary Account in the search field. Click Search.
- 6. Select the desired, hyperlinked **User ID** to open the user's account.





7. Navigate to the **SP Admin Account Consolidation Tasks** section of the user profile. Click the **Complete Task** button.



### EMAIL EXAMPLE

It is important to note, the SP Admin will receive an email when applications are listed under the secondary account and the SP Admin must resubscribe the applications under the primary account. The email template displayed below notifies the SP Admin an end user has initiated the account consolidation process. The email also displays:

- The user's Primary Account:
  - User ID
  - Email Address
  - Subscriptions
- The user's Secondary Account:
  - o User ID
  - Email Address
- Subscriptions that require re-subscriptions

**NOTE**: This scenario **DOES** require re-subscriptions or tasks from the SP Admin.



# **EXOSTAR**°

Samantha Torretti has initiated account consolidation.

The primary and secondary account details prior to account consolidation are listed below.

Primary account:

User ID: torrettis\_7865

Email: samantha.torretti+\_23456543@exostar.com

Secondary account:

User ID: torrettis 2850

Email: samantha.torretti+\_83848583@exostar.com

Subscriptions: EngageZone.msd.com

Subscriptions that require re-subscription: EngageZone.msd.com

Make the necessary changes locally to accommodate this request, then complete the SP Administrator Account Consolidation Task if applicable.