



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 [Email Template](#) 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**.

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. Enter your **Password**. Click **Next**.

AccountConsolidationTest@exostar.com

Enter Your Password

Password

This is your Exostar account password

[Use a different email or user ID](#)

[Forgot password?](#)

NEXT

4. Click the **Provider Administrator** tab → **View Users** sub-tab.
5. 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.

HOME MY ACCOUNT ADMINISTRATION **PROVIDER ADMINISTRATION** REGISTRATION REQUESTS CUSTOMER SUPPORT ADOPTION

Provider Administration

Organization: Exostar2
Credential Strength: Phone OTP - Two-Factor Authentication via SMS

APPROVE

VIEW USERS

VIEW ORGANIZATIONS

APPROVAL SETTINGS

REMOTE IDPS

APPLICATION SETTINGS

Click the Search button to view results.

Last Name Search term...

Search Clear Export Results

Set Columns Results Per Page : 25

User ID	Last Name	First Name	Email Address	Organization ID	Organization Name	RIDP User ID
bhanuril_2973	bhanuri-testnew	laxmi-testnew	laxmi.bhanuri+_283@exostar.com	EXO119038413	Exostar Managed CT Investigators	lax-888
darjip_8883	Darji	Pradip	pradip.darji+_347@exostar.com	EXOs029448149	Exostar2	
honerj_4291	Honer	Jonas	jhoner@amgen.com	EXO117882251	AMGEN	jhoner@amgen



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

SP Administrator Account Consolidation Task		
Service Provider Name	Status	Action
Test Service Provider 2	Waiting for Account Consolidation tasks to be completed.	Complete Task

Account Consolidation Audit		
Action	Detail	Date and Time
Second Account Authentication	samantha.torretti+_849596833@exostar.com	06/15/2023 13:53 PM GMT
Primary Account Selection	samantha.torretti+_8349596@exostar.com	06/15/2023 13:53 PM GMT
Primary Account Selection	samantha.torretti+_849596833@exostar.com	06/15/2023 13:54 PM GMT
Primary Account Selection	samantha.torretti+_8349596@exostar.com	06/15/2023 13:55 PM GMT
Primary Account Selection	samantha.torretti+_8349596@exostar.com	06/15/2023 13:55 PM GMT
Consolidation Initiated	User initiated account consolidation	06/15/2023 13:55 PM GMT

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:
 - User ID
 - Email Address
- Subscriptions that require re-subscriptions

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



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.