



SAM Account Consolidation Guide





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Account Consolidation Overview

This guide provides instructions on how to consolidate your accounts 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. Please 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 workflows:

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

Before you begin:

- Only two accounts can be consolidated at a time.
- The account you're currently logged into will be treated as one of the two accounts in the consolidation process.

To begin, you will need to sign in to the second account you wish to consolidate.

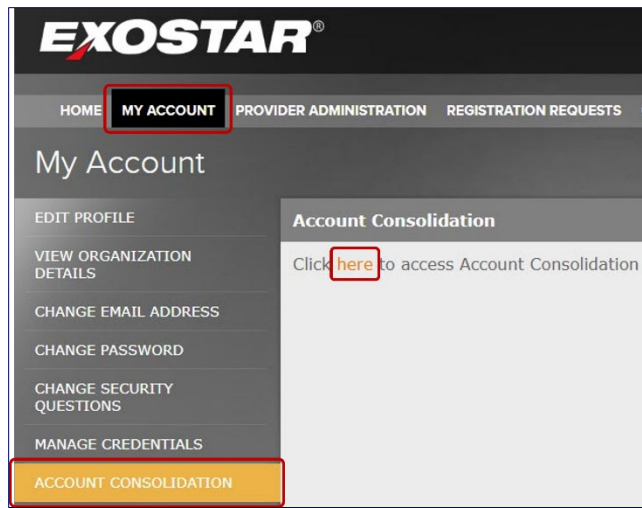
- If you don't remember the password for the second account, you'll need to log out of your current session and go through the account recovery process to reset the password. Once that's done, return here to continue.

To Consolidate your Accounts:

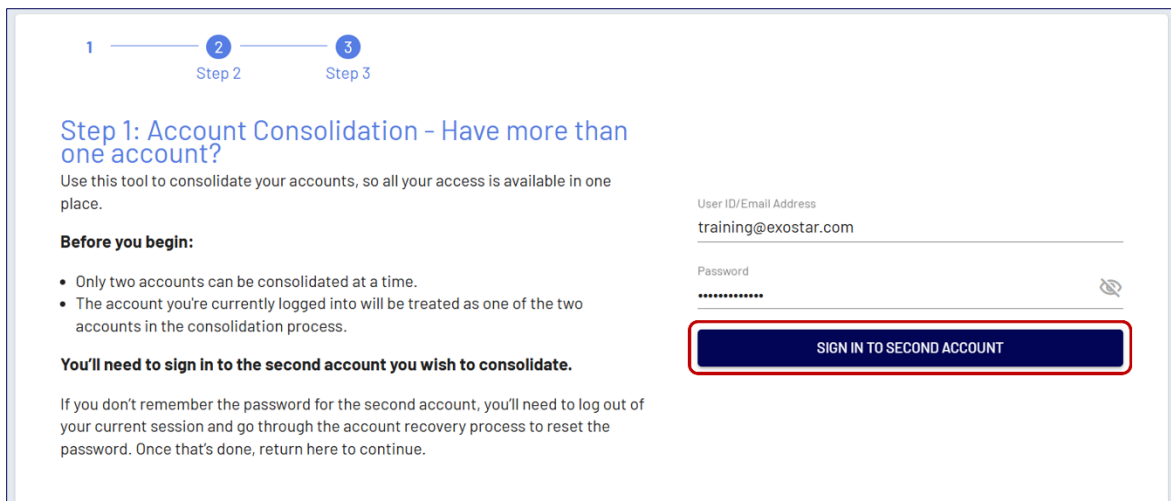
1. Login to your SAM Account - <https://secureaccess.exostar.com/>
2. Enter your Email / User ID and Password.

The image displays two screenshots of the EXOSTAR Secure Access Manager (SAM) login interface. The left screenshot shows the 'Step 1/2: Email Address / User ID' screen. It features a 'Login' button and a 'NEXT' button. The right screenshot shows the 'Step 2/2: Password' screen. It features a password field containing the text 'rooneys_8022', a 'NEXT' button, and links for 'Use a different Email or User ID' and 'Forgot Password?'.

3. From the SAM Dashboard, click the **My Account** tab. Then click **Account Consolidation** sub-tab.
4. Click the **"here"** link to access the Account Consolidation process.



5. Complete **“Step 1: Account Consolidation”** by entering your second account login credentials. Then click **Sign In to Second Account** button.



1 — 2 — 3
Step 2 Step 3

Step 1: Account Consolidation - Have more than one account?

Use this tool to consolidate your accounts, so all your access is available in one place.

Before you begin:

- Only two accounts can be consolidated at a time.
- The account you're currently logged into will be treated as one of the two accounts in the consolidation process.

You'll need to sign in to the second account you wish to consolidate.

If you don't remember the password for the second account, you'll need to log out of your current session and go through the account recovery process to reset the password. Once that's done, return here to continue.

User ID/Email Address
training@exostar.com

Password
.....

SIGN IN TO SECOND ACCOUNT

6. Next, complete **“Step 2: Choose the Account to keep”** and select your primary account by clicking the radio button. Then click **Consolidate** button.

Step 1 — Step 2 — Step 3

Step 2: Choose the account to keep

Select the account you want to retain as your **primary account**. This will become your only account going forward.

Primary Account	Secondary Account	User ID	Email	Subscriptions
<input type="radio"/>	<input checked="" type="radio"/>	rooneys_7120	Stephanie.Rooney@exostar.com	
<input checked="" type="radio"/>	<input type="radio"/>	testt_2342	training@exostar.com	

Cancel CONSOLIDATE

Click "Consolidate" to proceed
Click "Cancel" to exit

Note: Optional, click Cancel if you do not want to consolidate your accounts.

7. A confirmation screen will display, "**Step 3: Your Account Consolidation Request is now underway**".

Step 1 — Step 2 — Step 3

Step 3: Your Account Consolidation Request is now underway

The table below outlines the status of your **application access changes (originally associated with your secondary account)**. Some applications may require the **application owner** (e.g., Sponsor) to complete additional steps before you can access your primary account.

Status Legend

- **Waiting for Application Owner to Re-subscribe the Application**
The Sponsor must reassign access to your primary account.
- **Waiting for Application Owner Tasks to be Completed**
The Sponsor must complete internal updates. You are **not blocked** from accessing applications during this time and can continue to access through your primary account.

What Happens Next:

- Once the required actions are completed by the application owner, your access will be fully restored.
- For urgent access needs, please contact the application owner or support team directly.
- Until re-subscription or application owner tasks get completed:
 - You will not be able to initiate another account consolidation.
 - You will not be able to update your email address.

Application Name	Sponsor	Account Consolidation Status
TSP_4	Exostar LLC	Waiting for Application Owner Tasks to be Completed
TSP_5	Exostar LLC	Waiting for Application Owner to Re-subscribe the Application

8. Once your Account Consolidation is complete you will receive a confirmation email.