● BETA

Onboarding Administrator Assistant Guide

Secure Access Manager (SAM)

Date: March 2026   Version: 1.0 (Beta)

REVISION HISTORY

Date	Version	Author	Description of Changes
March 2026	1.0 (Beta)	Exostar	Initial release

IMPORTANT: BETA NOTICE

● **BETA FEATURE —** The Onboarding Administrator Assistant is Exostar's first AI-assisted feature in SAM and is currently available as a Beta release. As you explore this feature, your feedback is encouraged and greatly appreciated. Please use the Customer Support resources within SAM to share your experience.

OVERVIEW

The Onboarding Administrator Assistant is an AI-powered tool within SAM's AI Assistant tab that helps Adoption Administrators subscribe and unsubscribe users to applications in bulk. Unlike the SP Admin Bulk Actions tool, this assistant uses AI to intelligently parse uploaded files — no specific template is required. The assistant reads common spreadsheet formats and extracts user information automatically.

This guide covers the full end-to-end workflow for both the Subscribe and Unsubscribe flows.

Who can use this tool?

The Onboarding Administrator Assistant is available to users with the Adoption Administrator role in SAM.

Prerequisites

- Have an active Adoption Administrator role in SAM.
- Have a completed two-factor authentication (2FA) session, or be prepared to complete a Phone OTP step-up when accessing the AI Assistant tab.

ACCESSING THE ONBOARDING ADMINISTRATOR ASSISTANT

The Onboarding Administrator Assistant is accessed through the AI Assistant tab in SAM.

1. Log in to SAM.
2. Click the **AI Assistant** tab in the top navigation bar.
3. If your session does not already have an elevated 2FA status, you will be prompted to complete a **Phone OTP step-up** before proceeding.
4. You will be taken to the **Onboarding Administrator Assistant** landing page.

> **Note:** The AI Assistant tab is only visible to users with the Adoption Administrator role. If you do not see this tab, contact your SAM system administrator to verify your role assignment.

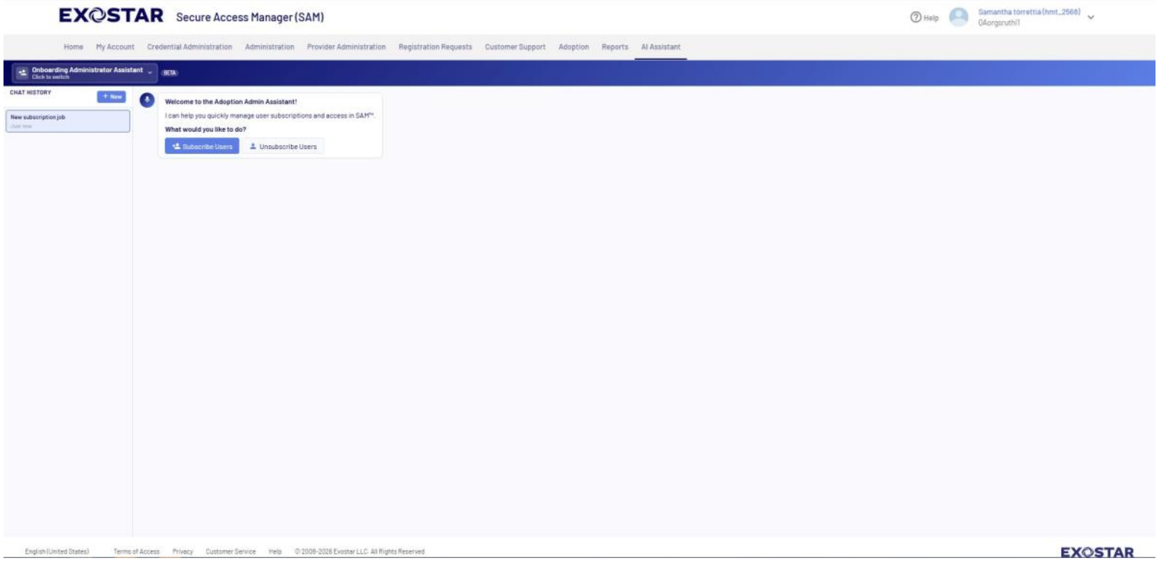

Figure 1 – Onboarding Administrator Assistant landing page

CHAT HISTORY PANEL

The left-hand panel displays your chat history for the Onboarding Administrator Assistant. Each entry shows the chat title and its status (e.g., In Progress, Complete). You can click any entry in the list to reopen that session and continue where you left off.

Starting a new chat

Click the **+ New** button at the top of the chat history panel to start a new session. This clears the current chat window but does not delete any previous sessions.

In-progress chat limits

The tool allows a maximum of 3 in-progress chats at any one time. If you attempt to start a new chat when you already have 3 in-progress sessions, an error message will be displayed. To proceed, you must first complete or delete one of your existing in-progress chats.

- To **delete** an in-progress chat, locate it in the chat history panel and use the delete option associated with that entry.

> **Note:** In-progress chats are saved automatically. You can leave the assistant at any point during the workflow and return later to continue from where you left off.

STEP 1: SELECT AN ACTION

On the assistant landing page, you will be presented with a welcome message and two on-screen buttons. Click the button for the action you wish to perform. Text entry is not available at this step.

- **Subscribe Users** – Creates new user accounts and/or subscribes existing users to one or more applications.

- **Unsubscribe Users** — Removes existing users' subscriptions from one or more applications.

STEP 2: PROVIDE YOUR USER LIST

After selecting an action, the assistant will ask how you would like to provide your list of users. Two methods are available:

Method 1: Upload a file (AI-assisted)

Upload a spreadsheet file containing your users. This is the AI-assisted method — the assistant will intelligently parse the file and extract user information automatically. No specific template is required.

- **Supported formats:** .csv, .xlsx, .xls
- **Maximum:** 5,000 users per file
- **Minimum required field:** Email address (used to identify whether users already exist in SAM)

> **Note:** If your file is empty, in an unsupported format, or cannot be parsed, the assistant will display an error message explaining the issue. Correct the file and re-upload before proceeding.

Method 2: Enter email addresses directly

Instead of uploading a file, you can enter email addresses directly into the email input field within the user input card, separated by commas or spaces.

- **Example:** john@acme.com, jane@acme.com or john@acme.com jane@acme.com

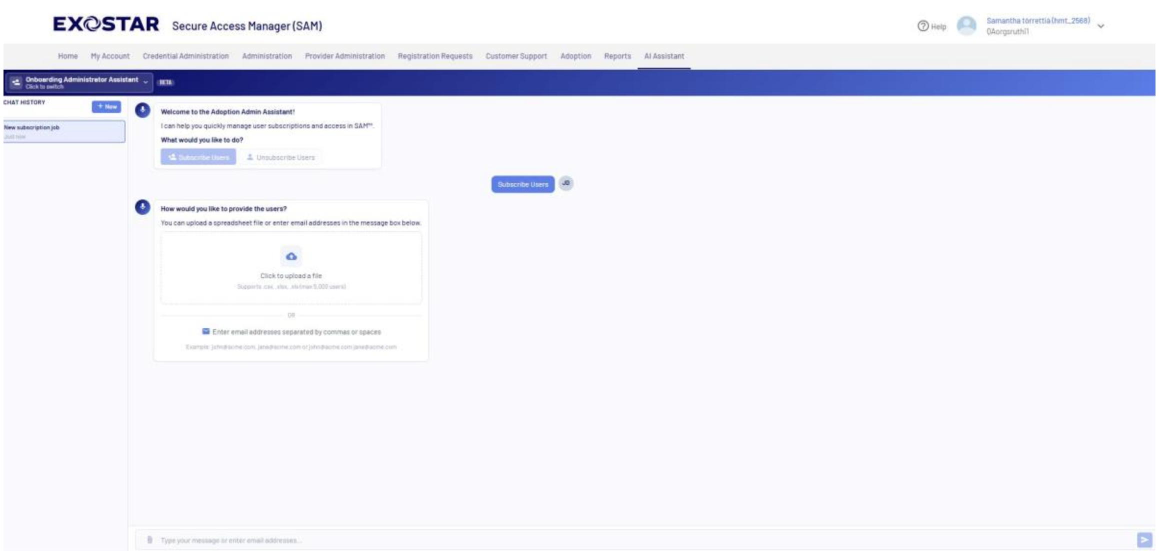

Figure 2 – User input options: file upload or direct email address entry

STEP 3: REVIEW THE FILE PROCESSING SUMMARY

Once the assistant has processed your file or email list, it will display a summary confirming how many users were found and breaking them down by type:

- **Existing users in SAM** — Users whose email addresses were matched to existing SAM accounts.
- **New users** — Users whose email addresses were not found in SAM and will require account creation. Required profile fields must be completed before processing.

Click **Continue to User Review** to proceed to the next step.

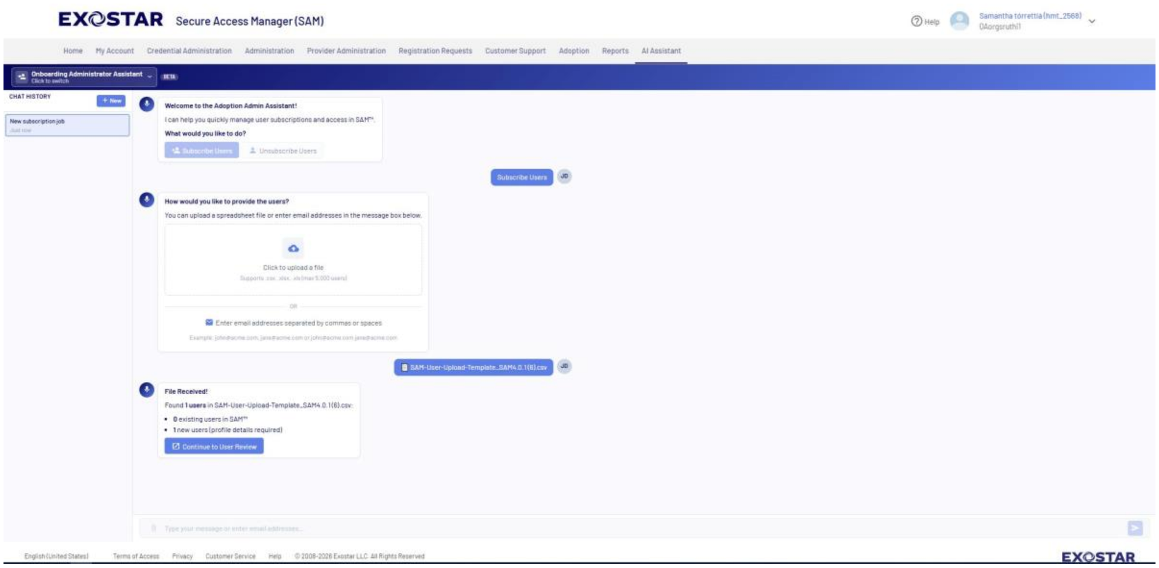

Figure 3 – File processing summary showing user counts

STEP 4: REVIEW USERS

The Review Users step displays a table of all users from your file. This is the first step of the three-step guided workflow stepper (Review Users → Configure Options → Download Results).

Subscribe flow — review and complete user data

For the subscription flow, the user table supports inline editing for new users. Existing users are displayed as read-only — their data cannot be edited at this stage.

The table contains the following fields:

Field	Required for New Users?	Notes
Status	System field	Indicates whether the user record is complete or has missing required fields.
Title	No	Honorific (e.g., Mr., Dr.).
First Name	Yes	
Middle	No	Middle name or initial.

Last Name	Yes	
Suffix	No	Name suffix (e.g., Jr., III).
Job Title	No	
Email	Yes — read-only	Pre-populated from the uploaded file. Cannot be edited at this stage.
Phone	Yes	
Fax	No	
Address 1	Yes	
Address 2	No	
City	Yes	
Country	Yes	
State	Yes	
Zip	Yes	
Time Zone	Yes	

Note: The email address cannot be edited in the Review Users step. It is the identifier used to match users to existing SAM accounts. If an email address is incorrect, remove the user from your file and re-upload.

Working with missing fields

Required fields that are missing will be highlighted in red. Use the following tools to manage incomplete records:

- **Show Missing Fields** toggle — Filters the table to display only users with incomplete required fields, making it easier to identify and complete them.
- **Export** — Downloads the current user list for offline editing. You can update the file externally and re-upload it.
- **Upload** — Allows you to upload a revised version of your file to replace the current user list.

The **Continue to Configuration** button at the bottom of the page is disabled until all required fields for all new users have been completed and all validation errors are resolved.

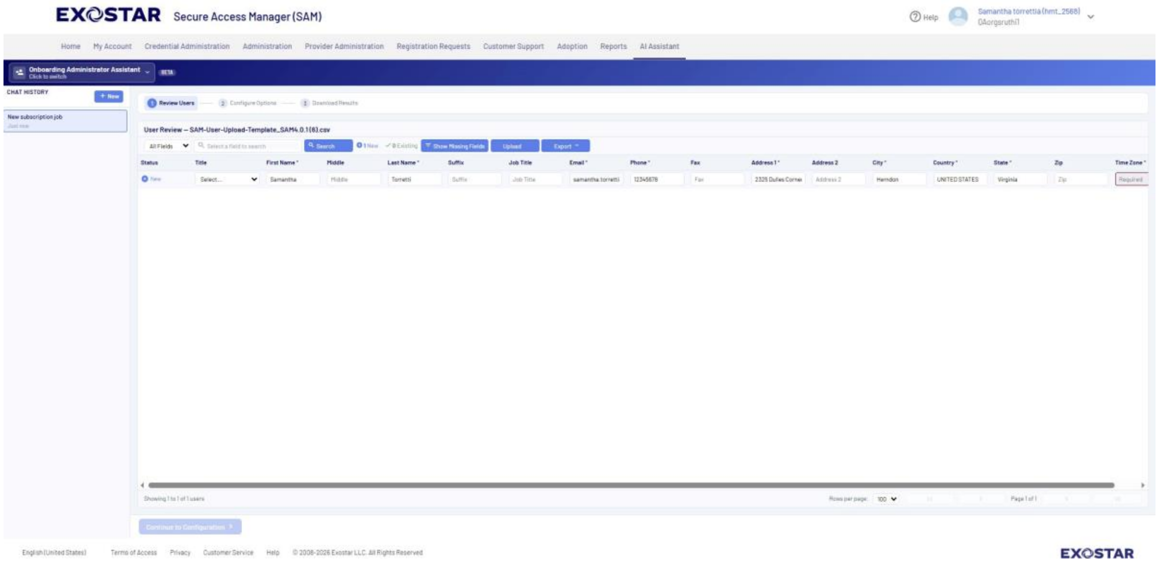

Figure 4 – Review Users grid showing user data and missing field indicators

Unsubscribe flow — review users (read-only)

For the unsubscribe flow, the Review Users table is entirely read-only. No data entry is required. The table shows each user's current subscriptions (scoped to the applications you have Adoption Admin access to). Users who were not found in SAM are displayed with a 'Not Found' status and will be skipped during processing.

> **Note:** Your chat session is saved automatically throughout this step. You can leave SAM and return later — your session will be available in the Chat History panel to resume.

STEP 5: CONFIGURE OPTIONS

After completing the user review, click **Continue to Configuration** to proceed to Step 2: Configure Options. This step allows you to select the applications and additional settings for the job.

Select applications (required)

Select one or more applications from the list to subscribe or unsubscribe users to/from. The list displays only applications for which you hold the Adoption Administrator role.

At least one application must be selected before you can proceed.

Onboarding sponsor (required — subscribe flow only)

Select the Onboarding Sponsor who will be assigned to all new users being created in this job. This field is required when the job includes new users.

Organization (subscribe flow only)

If your job includes new users, you must assign them to an existing organization in SAM. Search for the organization using its Exostar Organization ID or Organization Name. If all users in your job already exist in SAM, an organization does not need to be selected.

Subscription duration (optional — subscribe flow only)

Optionally, set a time-limited duration for the subscriptions being applied. If skipped, users will retain access until manually suspended or until housekeeping limits are applied by your organization's configuration.

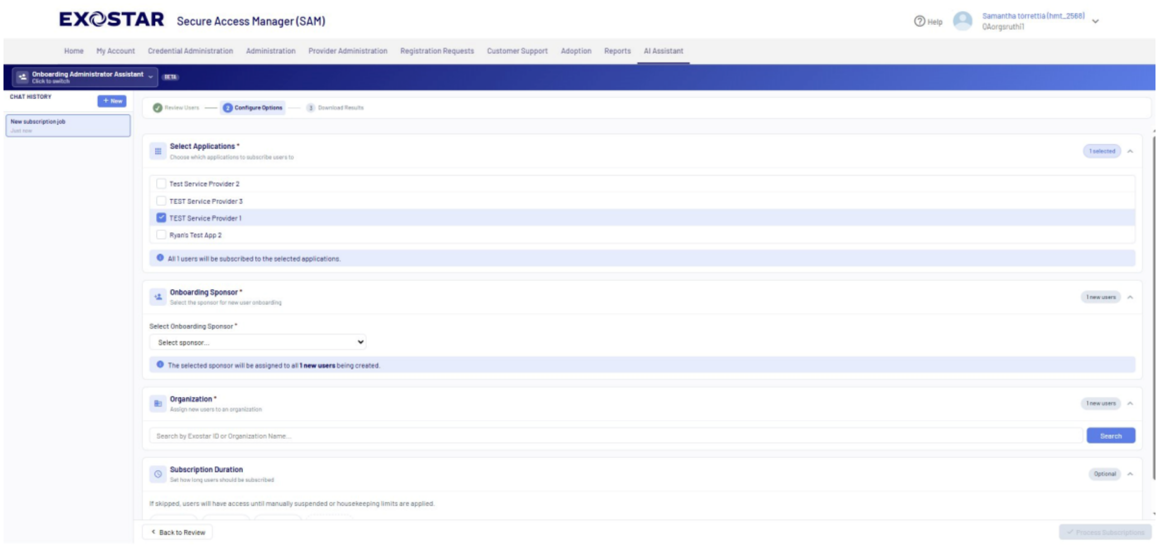

Figure 5 – Configure Options step showing application selection, onboarding sponsor, organization, and subscription duration

Once all required configuration fields are complete, click **Process Subscriptions** (or **Process Unsubscriptions**) to submit the job.

STEP 6: JOB PROCESSING

After submitting the job, a loading screen will be displayed while the assistant processes the users. A progress indicator and status message will confirm that the job is running. Do not close or navigate away from the page while processing is in progress.

Once processing is complete, the results will be displayed automatically.

STEP 7: VIEW AND DOWNLOAD RESULTS

The final step (Download Results) displays a summary of the completed job, including:

- Number of new users created
- Number of users successfully subscribed or unsubscribed
- Number of users already subscribed (skipped)
- Applications involved in the job

- Job metadata (submission time, submitted by, etc.)

Downloading the job report

Click **Download Report** to export a full record of the job in **.xlsx** format. The report includes each user's profile details and the outcome of the action applied to them.

- **Subscribe report filename:** subscription_report_<timestamp>.xlsx (e.g., subscription_report_2026-03-17_0930.xlsx)
- **Unsubscribe report filename:** unsubscribe_report_<timestamp>.xlsx (e.g., unsubscribe_report_2026-03-17_0930.xlsx)

Click **Start New Job** to return to the assistant landing page and begin a new session.

FREQUENTLY ASKED QUESTIONS

Do I need to use a specific template for my file upload?

No. The AI-assisted file parser can read most common spreadsheet formats (.csv, .xlsx, .xls) without requiring a specific template. The minimum required field is the email address, which is used to identify whether users already exist in SAM.

What happens if a user in my file does not exist in SAM?

For the Subscribe flow: the user will be identified as a new user. You will need to complete any missing required profile fields in the Review Users step before the job can be processed. The assistant will create the user account and subscribe them to the selected applications.

For the Unsubscribe flow: users who are not found in SAM will be skipped. They will appear in the Review Users table with a 'Not Found' status and will not be included in the job output.

What is the maximum number of users I can include in a single job?

The file upload supports a maximum of 5,000 users per file. If your file exceeds this limit, an error message will be displayed. Split your file into smaller batches and run multiple jobs.

Can I edit a user's email address in the Review Users step?

No. The email address is used as the unique identifier and cannot be edited at this stage. If an email address is incorrect, you will need to remove the user from your file, correct the entry, and re-upload the file.

I have 3 in-progress chats and cannot start a new one. What should I do?

The tool allows a maximum of 3 in-progress chat sessions at a time. To start a new session, complete or delete one of your existing in-progress chats from the Chat History panel. In-progress chats can be deleted using the delete option in the chat history list.

Will users receive a notification when they are subscribed or unsubscribed?

Yes. Users will receive an email notification informing them of the change to their application access.

The assistant is not responding as expected. What should I do?

As this is a Beta feature, you may occasionally encounter unexpected behaviour. Please use the Customer Support resources within SAM to report the issue and share your feedback. Your input helps improve the assistant for all users.