



# **SP Admin Bulk Actions Guide**

Secure Access Manager (SAM)

Date: March 2026 | Version: 1.0

## REVISION HISTORY

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

## OVERVIEW

The SP Admin Bulk Actions feature allows Service Provider (SP) Administrators to perform application access management actions—such as subscribing, suspending, unsuspending, and deleting subscriptions—for multiple users simultaneously. This eliminates the need to process each user individually, significantly reducing administrative effort when managing large user populations.

SP Admins can identify their target user set using either a query builder or by uploading a pre-prepared CSV or XLSX file. Once users are identified and applications are selected, the action is processed in bulk and results are available for download on the Bulk Jobs Board.

### Supported bulk actions

Action	Description
Subscribe Applications	Subscribes the selected users to the chosen application(s), granting them access.
Suspend Applications	Suspends the selected users' access to the chosen application(s). Suspended users cannot log in to the application until their access is unsuspending.
Unsuspend Applications	Restores access for users whose application subscriptions were previously suspended.
Delete Subscriptions	Permanently removes the selected users' subscriptions from the chosen application(s). This action cannot be undone.

### Prerequisites

To use Bulk Actions, you must:

- Have an active SP Admin role in SAM.
- Be assigned as SP Admin for at least one application.
- Have access to the Provider Administration section of SAM.

## ACCESSING BULK ACTIONS

Bulk Actions are accessed from within the Provider Administration area of SAM.

### Steps to access the Bulk Jobs Board

1. Log in to SAM and navigate to the **Provider Administration** tab.
2. Locate the **To access Bulk Actions click here** link and click it.

- You will be taken to the **Bulk Jobs Board**, where you can initiate new bulk jobs and review previously run jobs.

## THE BULK JOBS BOARD

The Bulk Jobs Board is the central hub for all bulk action activity. From this page, SP Admins can start a new bulk job and review the status and results of previously run jobs.

The board displays the following information for each previous job:

- Row #: A sequential identifier for each job.
- User List Name: The source of the user list (e.g., Query Generated or the name of an uploaded file).
- Action Taken: The bulk action that was applied (e.g., Subscribe Applications).
- Job Start / Job End: The timestamps when the job began and completed processing.
- Status: The completion status of the job (e.g., complete).
- Total: The total number of users included in the job.
- Success: The number of users for whom the action was applied successfully.
- Fail: The number of users for whom the action failed.

**Note:** SP Admins will only see jobs that they personally initiated. Jobs run by other administrators will not appear on your Bulk Jobs Board.

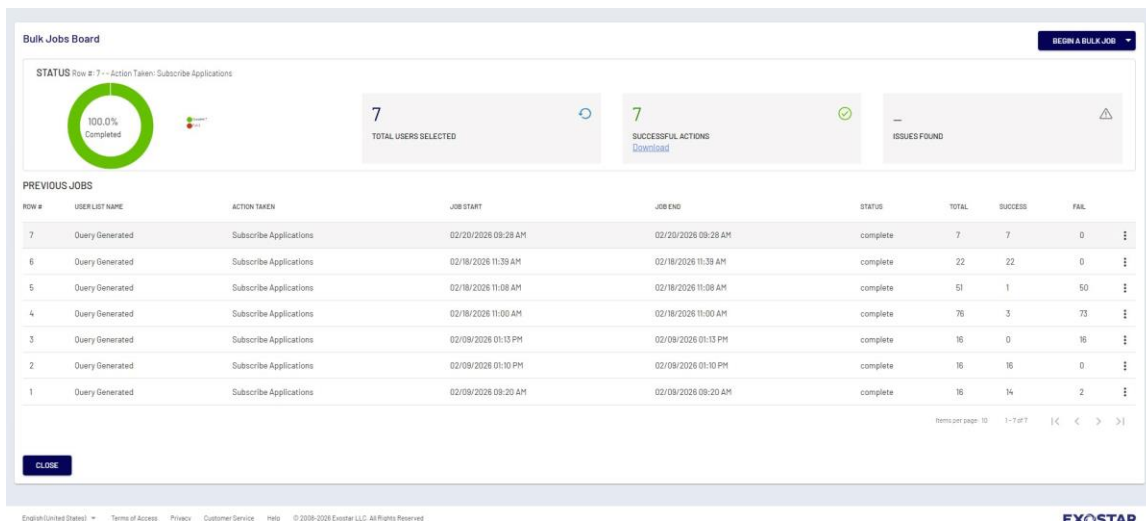


Figure 1 – Bulk Jobs Board showing job status summary and previous jobs list

### Status panel

The status panel at the top of the Bulk Jobs Board displays a real-time summary of the most recently selected or running job, including:

- Total Users Selected: The number of users targeted by the job.
- Successful Actions: The number of users for whom the action completed successfully. A Download link is provided to export a list of successful records.
- Issues Found: The number of users for whom the action encountered an error.

- A progress indicator (donut chart) showing completion percentage.

## STARTING A BULK JOB

To begin a new bulk action, click the **Begin a Bulk Job** button in the upper-right corner of the Bulk Jobs Board. A dropdown menu will appear with the available bulk action types.

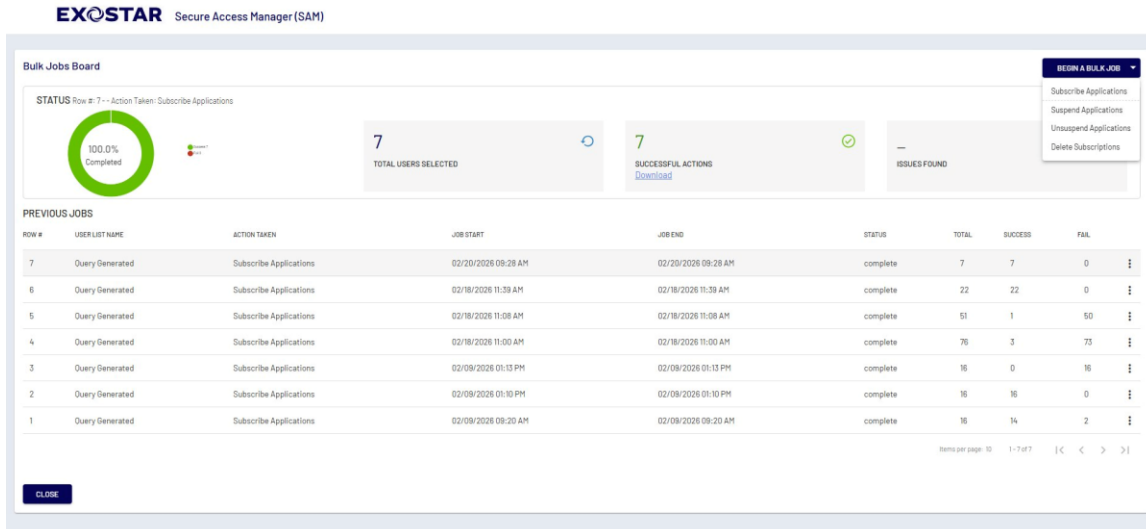


Figure 2 – Begin a Bulk Job dropdown menu showing available action types

### Select an action type

Select one of the following actions from the dropdown:

- Subscribe Applications
- Suspend Applications
- Unsuspend Applications
- Delete Subscriptions

After selecting an action, you will be taken to the bulk action workflow page, where you will identify your target users and select the application(s) for the action.

## IDENTIFYING TARGET USERS

On the bulk action workflow page, you must identify the users you wish to include in the job. There are two methods available: using the query builder or uploading a file. These two methods are mutually exclusive – selecting one will disable the other.

**Note:** You must use either the query builder or the file upload method – you cannot use both in the same job. Once you begin using one method, the other will become unavailable for that job.

### Method 1: Query builder

The query builder allows you to search for users using one or more filter conditions. Conditions can be combined using AND or OR logic, and rule groups can be added to build more complex queries.

To use the query builder:

4. Under **Find Users**, configure your filter criteria by selecting a field (e.g., Last Name), a condition (e.g., Is), and a value (e.g., Smith).
5. Click **+ Add Rule** to add additional filter conditions, or click **+ Add Rule Group** to create nested logic.
6. Click **Run Query** to execute the search. Results will appear in the **User Query and Filter Results** section below.
7. Review the results. The total number of matching users is shown above the results table. Use **Modify Column Headers** to customise which columns are displayed.

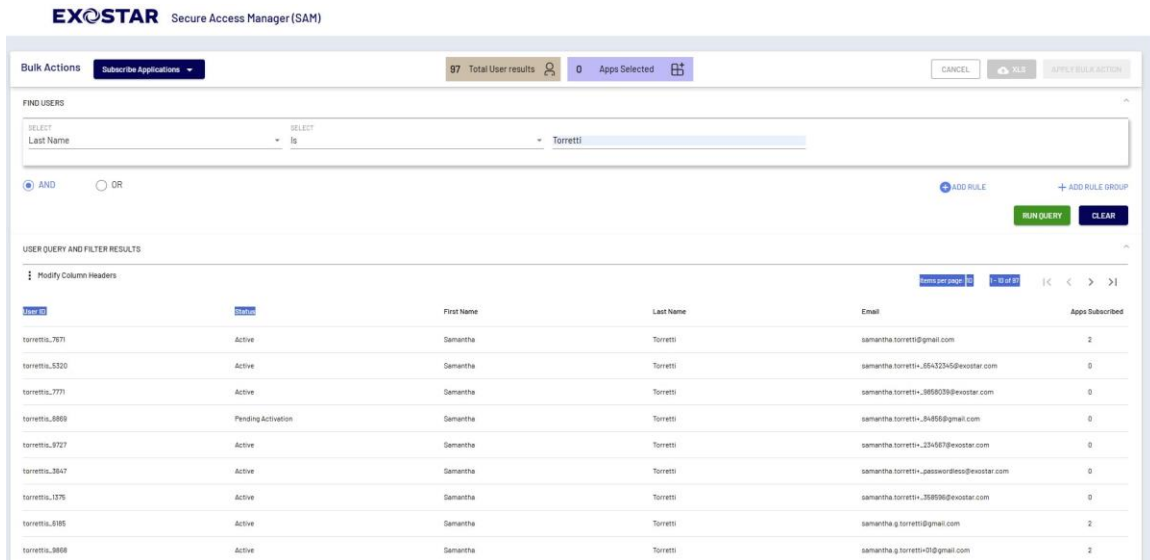


Figure 3 – Query builder and User Query and Filter Results section

## Method 2: CSV / XLSX file upload

If you already have a prepared list of users, you can upload it directly using the provided CSV or XLSX template. This method is useful when your user list is derived from an external source or has been prepared in advance. The template includes two identifier columns – Email Address and User ID – and the tool will match users based on whichever column is populated.

To use the file upload method:

8. **Download the provided template file** (CSV or XLSX format). The template defines the required column structure for the upload.
9. **Populate the template** with your users' identifiers. The template contains an **Email Address** column and a **User ID** column. You may populate either or both columns – users can be identified by Email Address only, User ID only, or both. At least one identifier must be provided per row.
10. **Upload the completed file** using the file upload control on the bulk action workflow page.
11. **The system will validate the file** and populate the User Query and Filter Results section with the matched users.

**Note:** If you upload an invalid file (incorrect format, missing required columns, or unsupported file type), an error notification will be displayed. Correct the file and re-upload before proceeding.

## SELECTING APPLICATIONS

After your target users have been identified, scroll down to the **Select Applications for Bulk Action** section.

This section displays a list of applications for which you hold the SP Admin role. Only applications you are authorised to administer will appear in this list.

The application list includes the following columns:

- **Select:** Checkbox to include the application in the bulk action.
- **Provider:** The name of the organisation or entity that owns the application.
- **Application:** The name of the application.

To select applications:

12. Check the checkbox next to one or more applications you wish to apply the bulk action to.
13. Once your selections are complete, click **Apply Bulk Action** to submit the job.

SELECT	PROVIDER	APPLICATION	SPONSOR CODES
<input type="checkbox"/>	Exostar LLC	TSP_5	_____
<input type="checkbox"/>	Exostar LLC	TEST Service Provider 1	_____
<input type="checkbox"/>	Applian BPM	KPH	_____
<input type="checkbox"/>	Exostar	Clinical Trial Access Manager	_____
<input type="checkbox"/>	exostar	QA_TEST3	_____
<input type="checkbox"/>	Smart App LLC	APP_SMART	_____
<input type="checkbox"/>	Exostar	Test_Test9	_____
<input type="checkbox"/>	Exostar	Ryan's Test App 2	_____
<input type="checkbox"/>	Exostar	MEDIPLUSPRO	_____
<input type="checkbox"/>	Exostar	OPENBOOK	_____

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*Figure 4 – Select Applications for Bulk Action section*

**Note:** The application list is scoped to your SP Admin permissions. Applications for which you do not hold an SP Admin role will not appear in this list.

## REVIEWING RESULTS ON THE BULK JOBS BOARD

After clicking **Apply Bulk Action**, you will be returned to the Bulk Jobs Board. The job will be processed and its results will be reflected in the status panel and the Previous Jobs table.

### Downloading results

Both successful and failed action records are available for download from the Bulk Jobs Board:

- **Successful Actions:** Click the Download link in the Successful Actions tile of the status panel to export a list of users for whom the action was successfully applied.
- **Failed Actions:** Click the three-dot menu (: ) on the right side of any job row in the Previous Jobs table to access download options for that job’s failure records.

## Understanding failure reasons

When a bulk action fails for one or more users, the failure record will include a reason code. The table below describes the possible failure reasons:

Failure Reason	Explanation
State_mismatch	The user is already in the status that the action would produce, or is in a status that prevents the action from being applied. Examples: attempting to subscribe a user whose access is suspended, or suspending a user whose access is already suspended.
Forbidden	The SP Admin does not have permission to perform the action for the affected user. This is typically an edge case and may indicate that the user does not fall within the SP Admin's scope of administration.

## FREQUENTLY ASKED QUESTIONS

### Why can't I use both the query builder and file upload at the same time?

The tool enforces mutual exclusivity between the two user identification methods. Once you begin using one method, the other is disabled for that job. This prevents conflicting user lists from being applied to the same action. To switch methods, clear the current input and start again.

### Why does an application not appear in my application list?

The application list only displays applications for which you hold the SP Admin role. If an application you expect to see is not listed, confirm with your system administrator that your SP Admin permissions for that application are correctly configured.

### I can see jobs on the Bulk Jobs Board that I did not run – is this expected?

No. Each SP Admin can only see jobs they personally initiated. If you are seeing unexpected jobs, contact your system administrator.

### What happens if a Subscribe action is run for a user whose access is already suspended?

The action will fail for that user with a State\_mismatch error. A user in suspended status cannot be directly subscribed via bulk action. The suspension must first be resolved before the subscription action can be applied.

### Will users receive a notification after a bulk action is applied?

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