Security Awareness Training Partner Guide

User Management

Azure AD Sync, On-Premise AD Sync, G-Suite Sync, and Bulk User Management

Telesystem
IT's About Trust

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www.TrustTelesystem.com

User Management

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User Management

Resources

- BSN Program Overview
- In-Portal Purchasing & Billing

- Find product-specific how-to guides in the Partner Resources page!

User Management Overview

Adding, updating, deleting, and deactivating users in the PII/PHI Protect portal can be done manually, by .csv file, by Azure Active Directory (Azure AD), or with our On-Prem solution.

General User Management – page 5

A quick overview of the basic user options including ad-hoc user creation, editing a user, and creating Tags.

Azure Active Directory Synchronization – setup starts on page 10 or page 20 – see below

Azure AD allows you to simply manage your PII Protect users for your Azure clients. Choose between Classic setup and Simple Setup.

Simple Setup - *Recommended

This syncing feature will take away all your syncing pain points. Quickly access your client's directory, verify counts and groups, then sync users within minutes. No more long waiting for initial syncs, no more Powershells, no more headaches!

Requirement: You must have a Global Admin account in the tenant you are syncing. Begin on Page 10

Classic Azure AD Sync

For Partners without access to a Global Admin account within their client's tenant, Classic Azure AD Sync will be your best option. Powershell script options will be provided but initial syncs will take up to 4 hours. No instant verification of set up is available.

For this set up process, begin on Page 20

On-Premise Ac ive Directory via our NEW Ac ive Directory Monitor and Sync Agent – setup starts on page 32

If you have clients that are using On-Premise, you can utilize Active Directory along with our new Active Directory Monitor and Sync solution to sync with the Security Awareness Training portal and simplify user management for your clients!

G-Suite Directory Synchronization – setup starts on page 42

G-Suite Directory Sync allows you to simply manage your PII Protect users for your G-Suite clients.

Bulk User Management via CSV Upload – setup starts on page 56

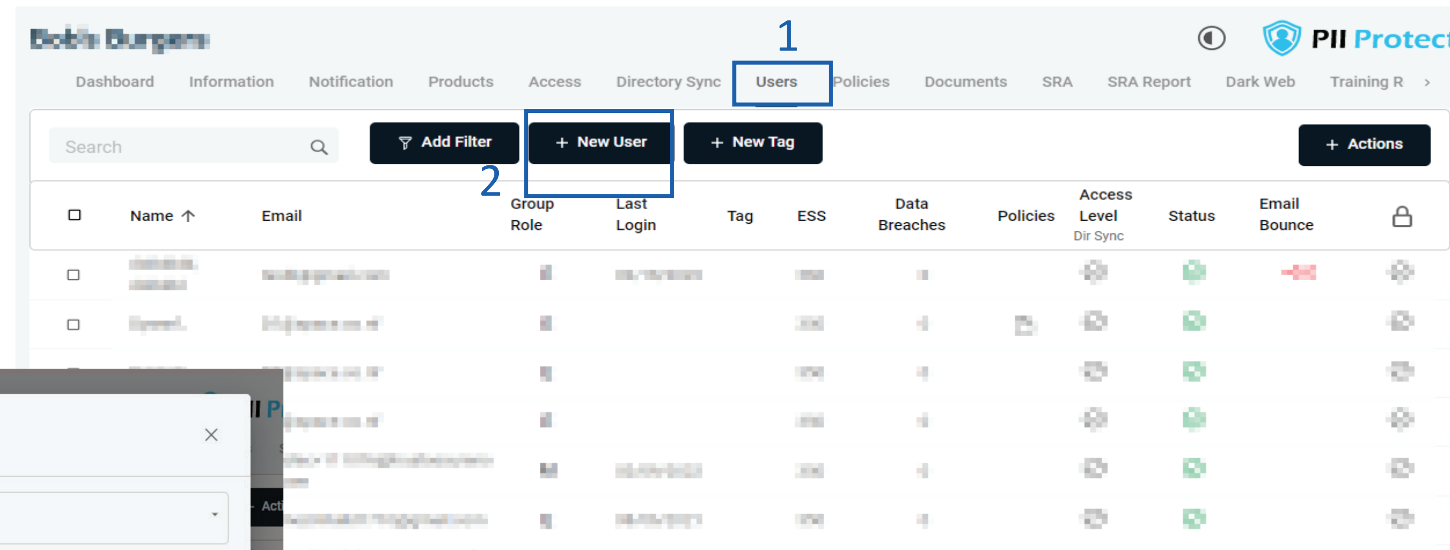
If you'd prefer to manage users manually, we provide a .csv that is available for adding, updating, or deactivating users inside the PII/PHI portal.

If you have any questions, please feel free to contact us at support@telesystem.us

General User Management – Creating a New User

We've made it easy for Partners to quickly add users on-the-fly. Though setting up synchronization tools are more beneficial for automation, ad-hoc user creation can help for smaller clients or trialing users.

Adding a New User



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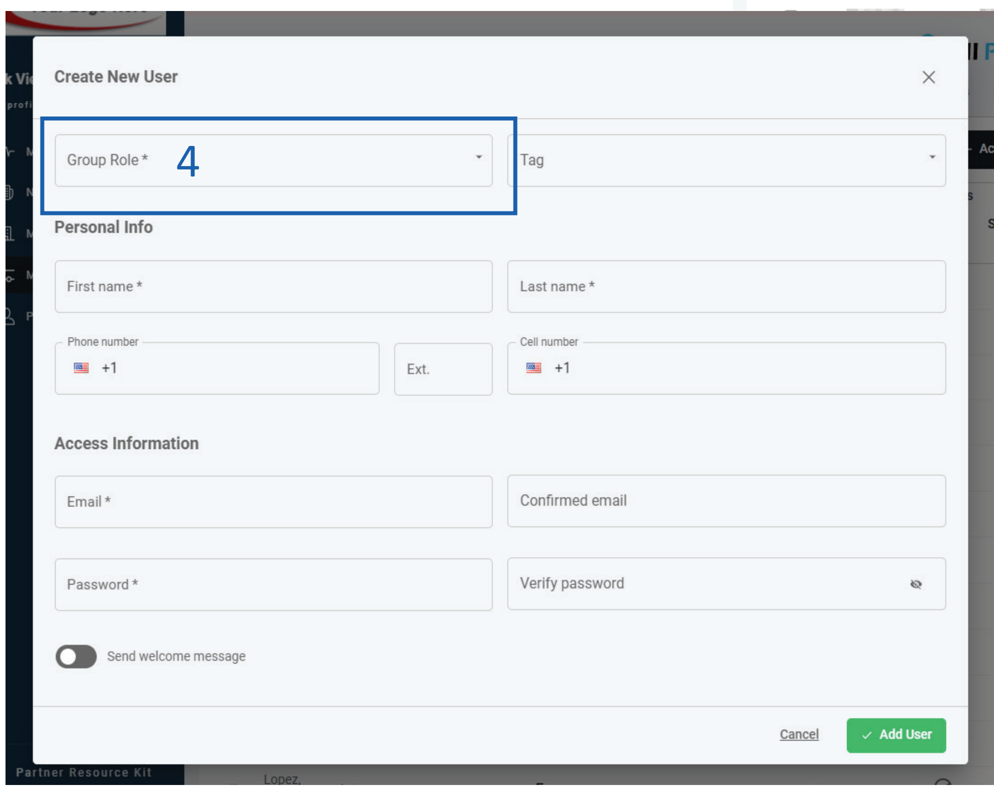

1. To add a new user, within your desired client, click the "Users" tab
2. To add a new user, click the "New User" button
3. A modal will appear with options to create a new user.
4. Group Role: Select the user's access level by role.

Employee: Basic access to interact with trainings and read-only document access

Manager: Full access to manage company account, employees, view reports, add/edit documents etc.

Manager Admin: Manager level access plus the ability to schedule and send phishing campaigns

Continued…

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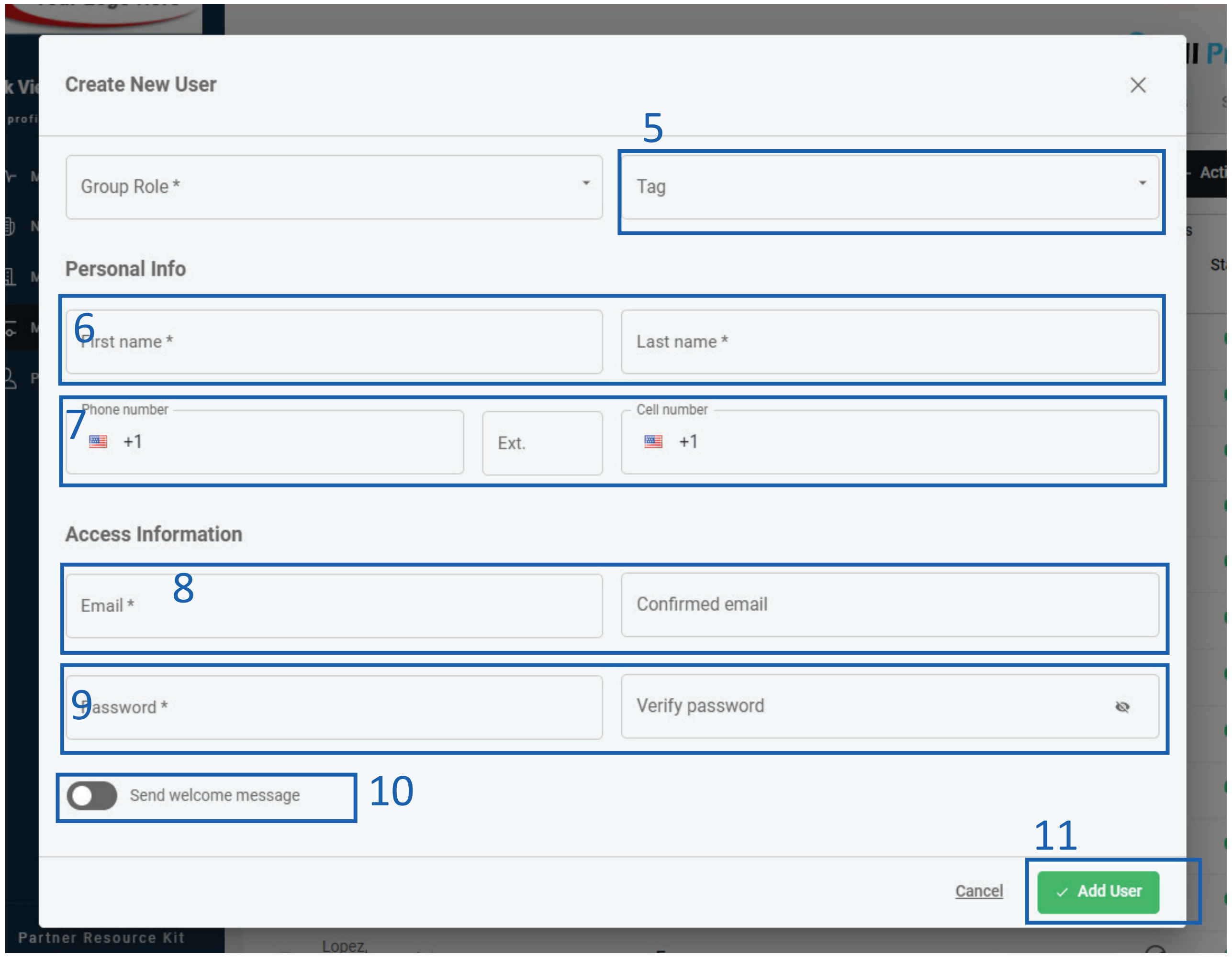


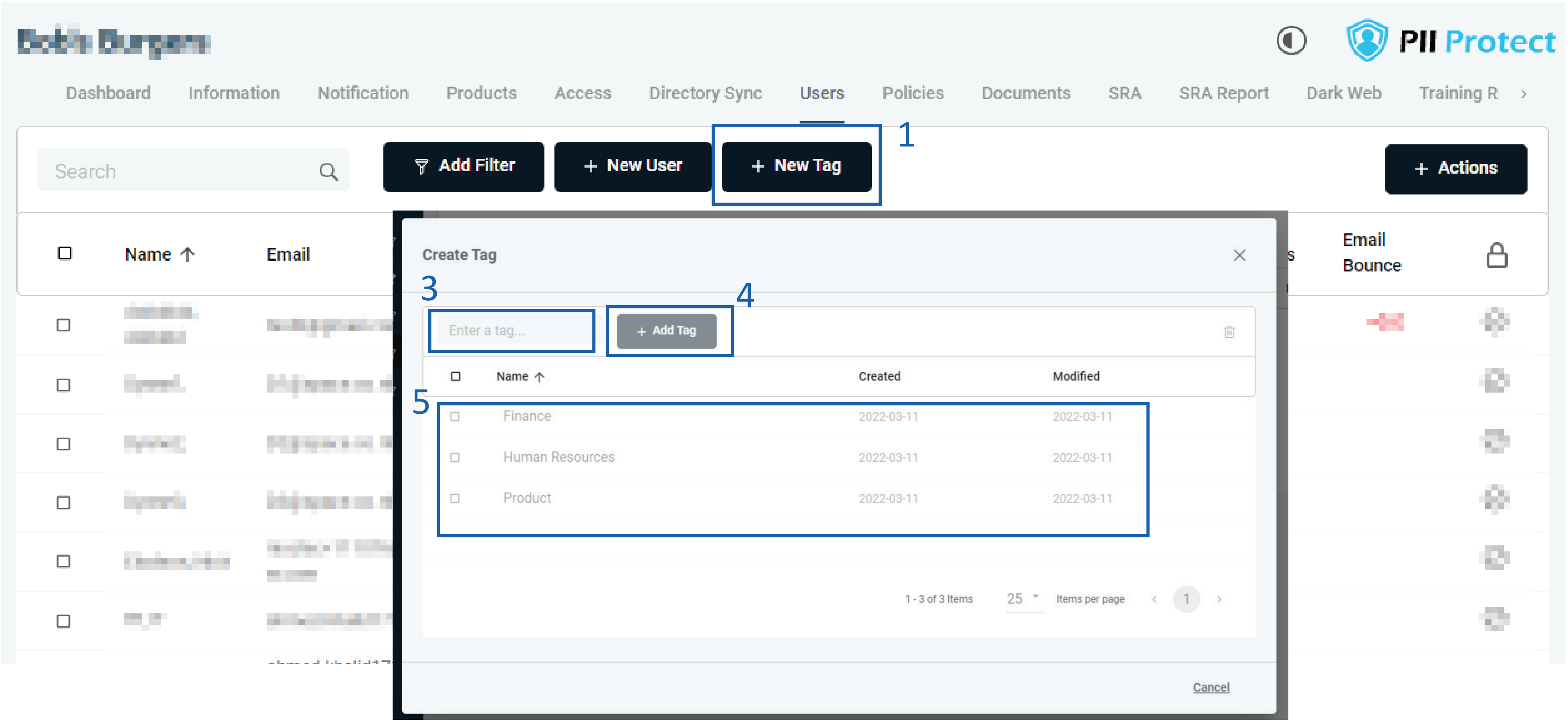
5. Tag: (optional) Select a pre-set tag for this user (for information on tag creation, see page 7)
6. First/Last name: required
7. Phone numbers: (optional) enter their work and/or cell phone numbers
8. Email: (required) this will be how the user accesses their account with. Must be a valid email.
9. Password: Password must be at least 6 characters in length. *Not required if "Send welcome message" is enabled (see below)
10. Send welcome message: If enabled, a welcome email will be sent to user's email once created. No password would be set upon creation screen, user would set their own password via the welcome message.
11. Click "Add User" button when ready

Note: If synchronization methods (Azure, On-Prem, Google) are enabled, creating users manually via this method will result in an error. The user should be set up via the appropriate sync method instructions.

General User Management – Adding Tags

Tags are an easy way to position users into groups to help with more accurate reporting and tracking. Tags can be set up within the "User" tab or can be created using any other synchronization method (Azure, On-Prem, Google, CSV)

Adding Tags

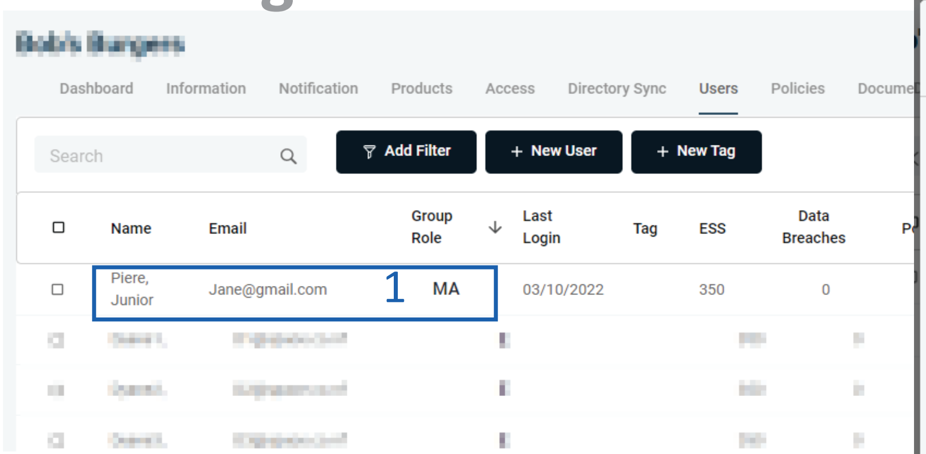


1. To create or manage tags, navigate to the "Users" section for the client, select "New Tag".
2. A modal will appear where existing tags will appear, and new tags can be entered or managed.
3. To add a new tag, type your desired tag name in the "Enter a tag" textbox.
4. Click "Add Tag".
5. The new tag should appear in the list below.
6. Users can be assigned tags when created individually or after creation by editing the user(s).

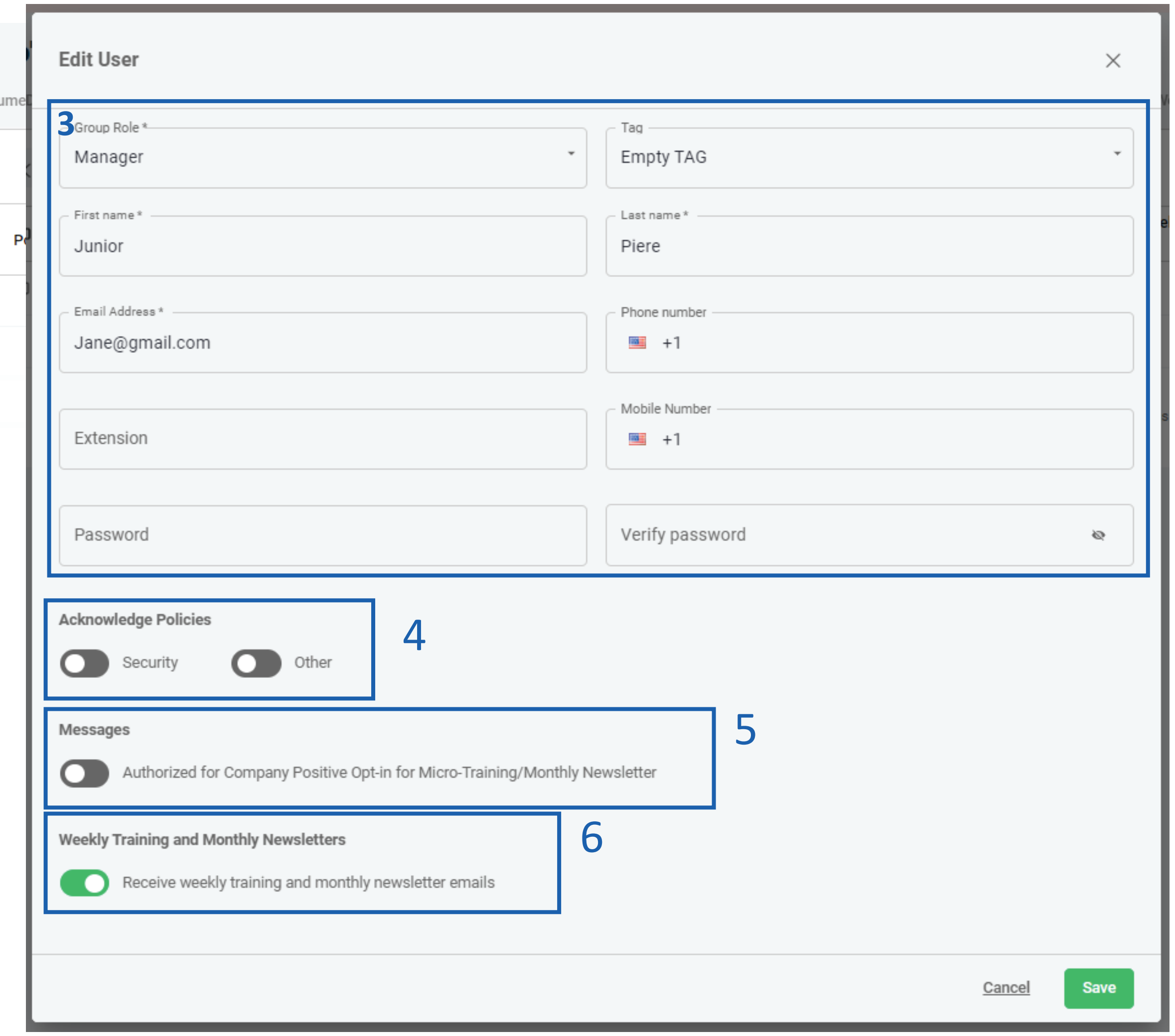
General User Management – Editing a User

After a user is created, their account details can be edited. Note: If certain directory sync or federated login options are enabled, some fields may not be editable within the PII Protect portal.

Editing an Existing User



1. To edit an employee, in the “Users” section, select/click the user you are editing.
2. A modal will appear with existing user data.
3. You can edit the Role, Tag, First/Last name, Email Address, Phone, and Password.
4. Acknowledge Policies: If slider is on (green) the user has acknowledged the provided policies and procedures. You may check or uncheck these here.
5. Messages: Here you can authorize this user (only for managers) for company positive opt-in for the weekly Micro Trainings. See this guide for reference.
6. Enable individual level access for weekly Micro Training emails to be sent to the user.



Note: Passwords must now meet certain complexity requirements. Passwords are measured compared to their overall crackability. If your password is rated as too risky, try adding an additional word or additional characters.

General User Management– Editing a User

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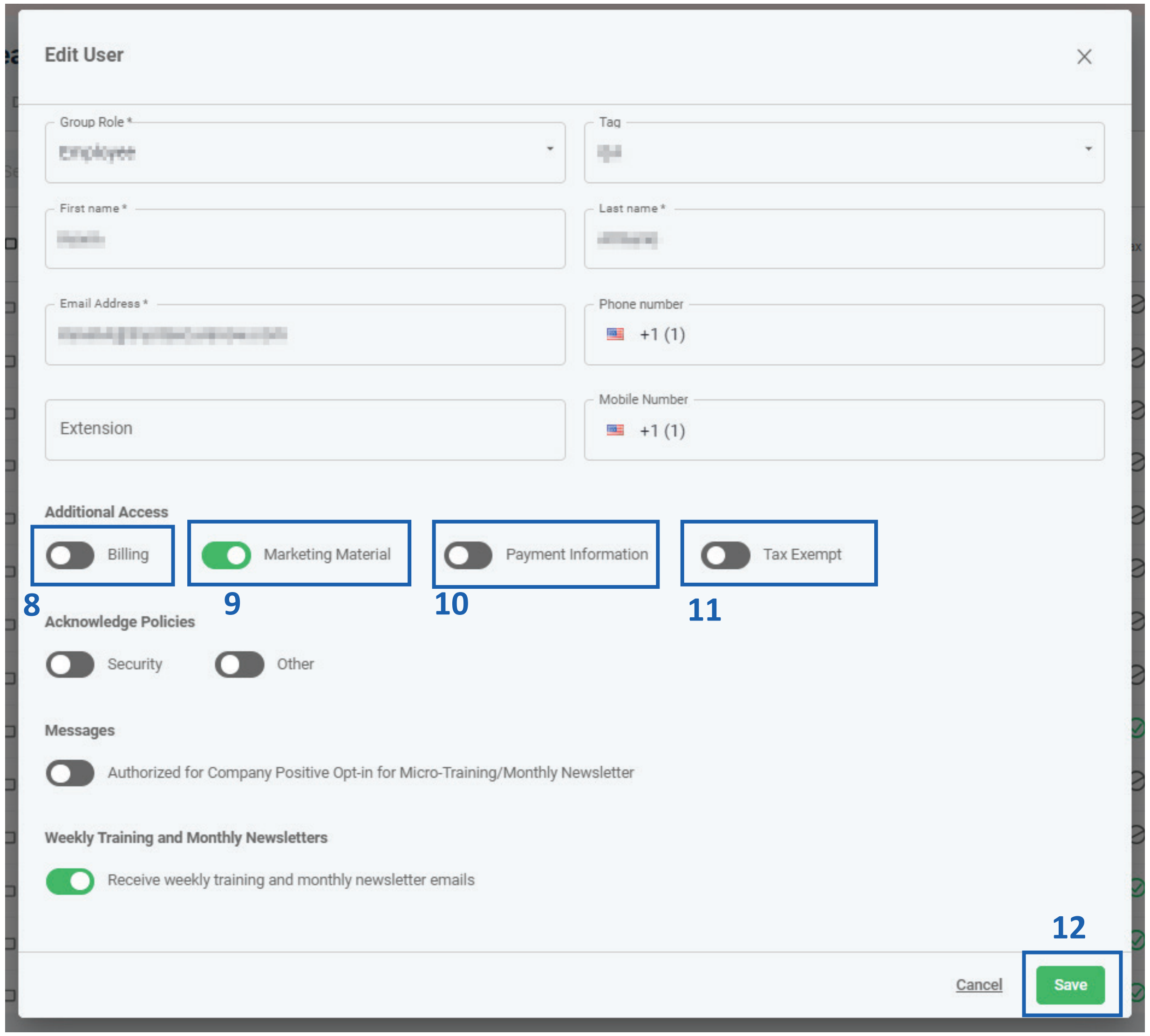
Editing an Existing User

7. Additional options may be available for users within YOUR MSP's tenant including;
8. Billing – Enables user to access billing tab of portal
9. Marketing Material – Enables user to access Partner Resource Kit
10. Payment Information – Enables the user to edit payment information
11. Tax Exempt – Enables user to access the Sales Tax Exemptions tab

12. Click the "Save" button to save any edits made

Note: If synchronization methods (Azure, On-Prem, Google) are enabled, editing users manually via this method may result in an error for certain fields. The user should be edited via the appropriate sync method instructions.



General User Management– Editing a User

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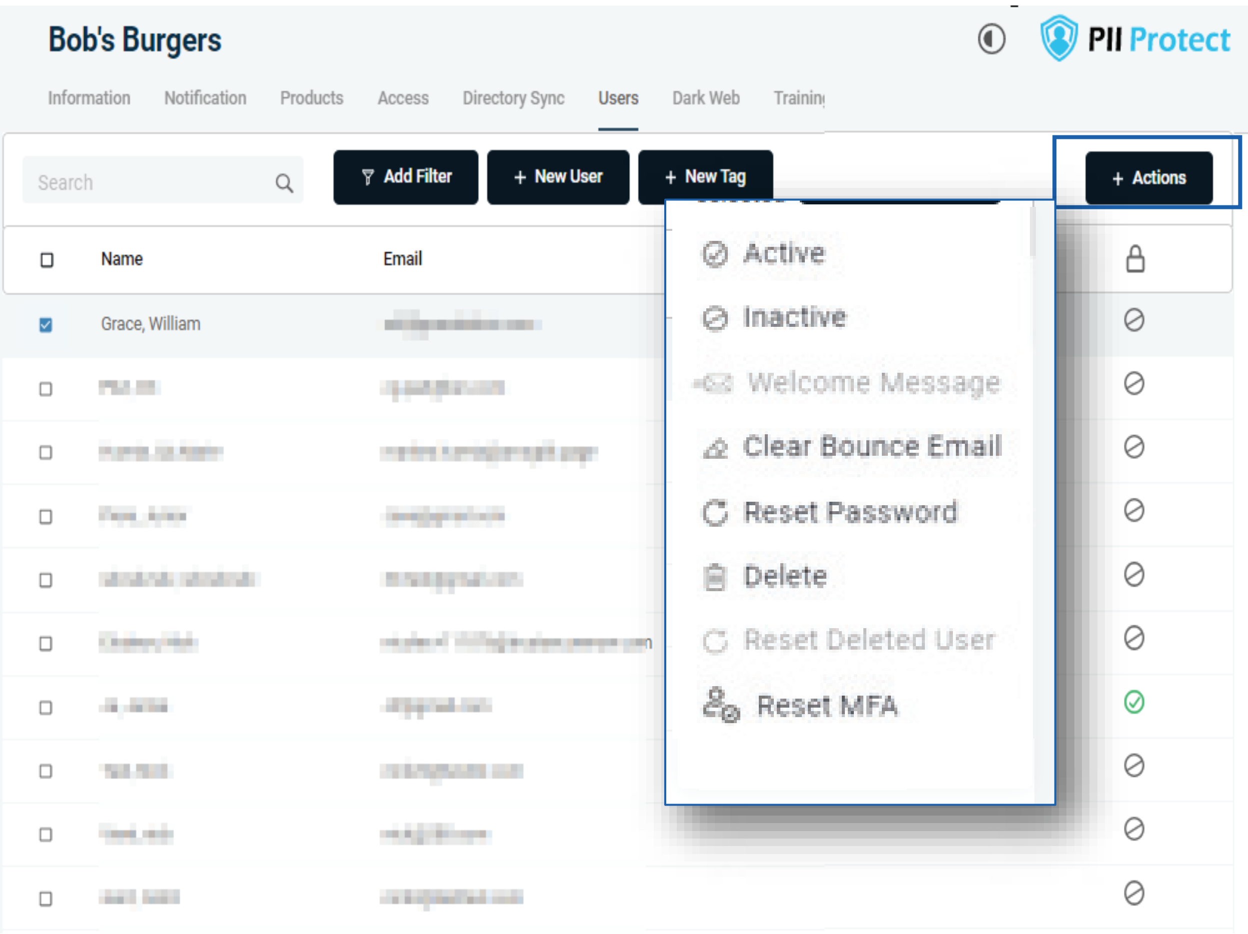
User Actions

1. Actions can be performed on any or multiple users. Use the checkbox options to select the user(s) you wish to perform the action on.

- Activating a User
- Inactivating a User
- Sending a Welcome Message
- Clearing a Bounced Email
- Resetting a Password
- Deleting a User
- And Resetting a Deleted User
- Resetting MFA*

Tip: Using the “select all” checkbox at the top of the table will only select all the users on the current page. Performing an action for all users would need to be done on a page-by-page basis.

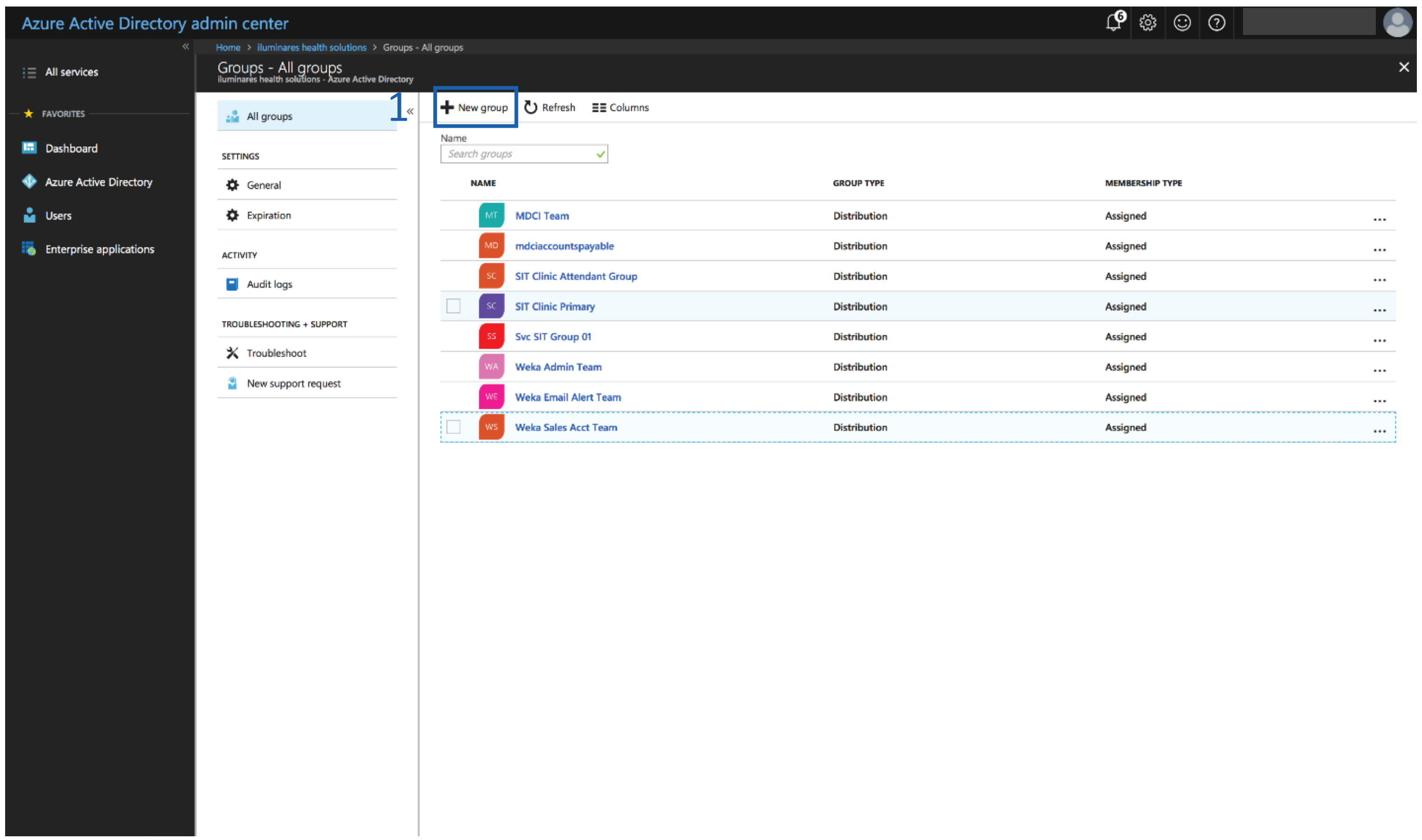
Tip: If native MFA is enabled, and user has issues accessing the portal, use the “Reset MFA” action.



Azure Act ve Directory Sync – Simple Setup

Our Azure Act ve Directory Synchronizat on feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Setup in Microsoft 365 Admin Center



1. Create Azure AD Sync Security Groups to define the portal access for each employee. The following two groups MUST be created:

BSN-Employees: Defines the users that will be enrolled in the portal as standard employees under that client.

BSN-Managers: Defines users in the manager role, supersedes BSN-Employees.

- Managers get access to reporting and employee data inside the PII/PHI Protect portal.

Note: When entering the above security groups, spaces are NOT permitted before, after, or within the string.

Important: If Azure AD Sync is enabled and these groups are NOT defined after the initial synchronization, there is a risk of users becoming deactivated in the portal and the users will be notified.

Azure Active Directory Sync – Simple Setup

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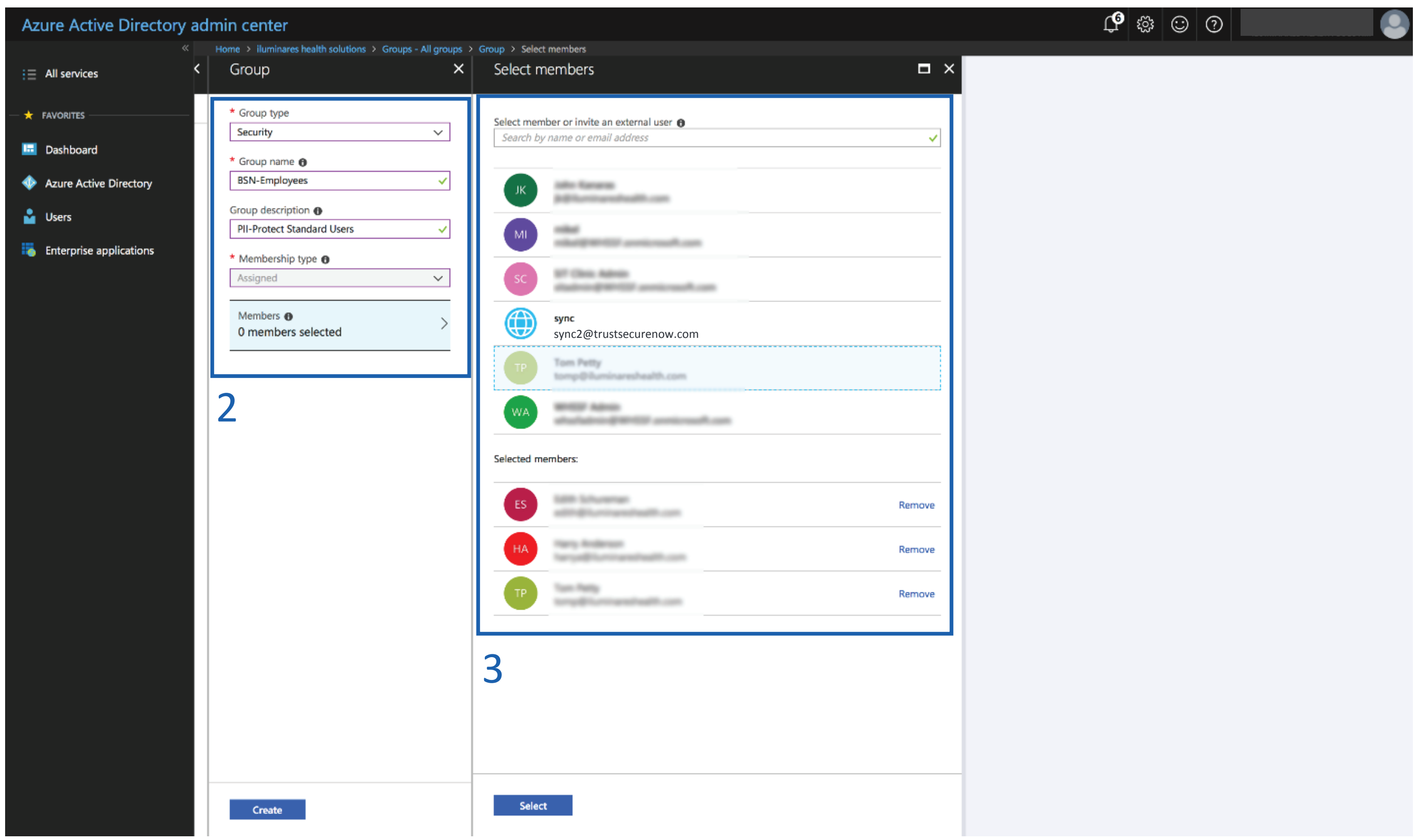

Important: For those using On-Premise along with Azure Sync to synchronize with the free tier or Azure AD: Nested group memberships are not supported for group-based assignment at this time.

2. Create the BSN-Employees group with the following parameters:

Group Type: Security
Group Name: BSN-Employees
Group Description: PII/PHI Protect Standard Users

3. Assign users to the group.

Note: Be sure not to assign non-user accounts to this group as portal accounts WILL be created for all users assigned to this group. If you assign users to this group and to the BSN-Manager group, the manager role will take precedence.

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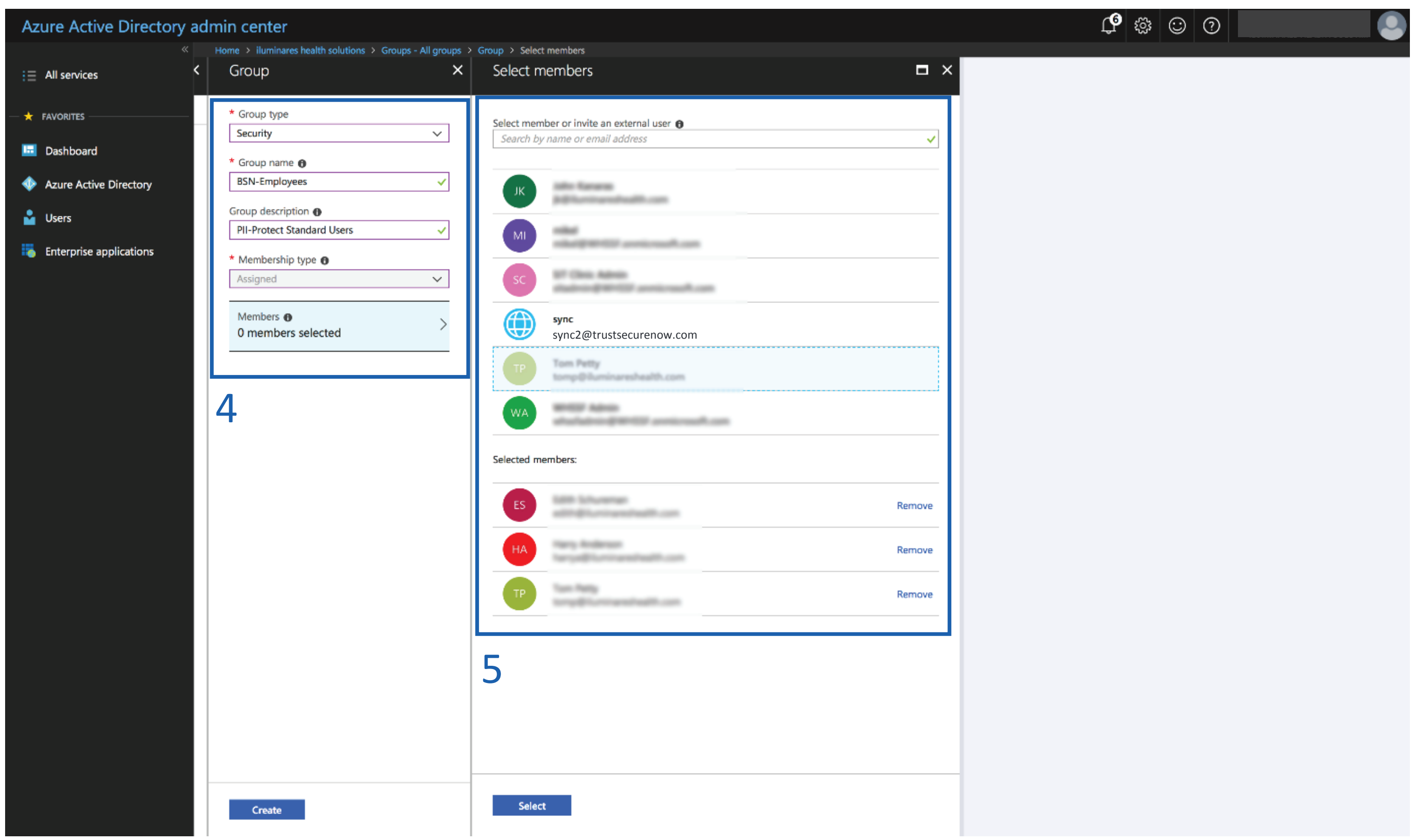

4. Create the **BSN-Managers** group with the following parameters:
   - Group Type: Security
   - Group Name: BSN-Managers
   - Group Description: PII/PHI Protect Manager Role
5. Assign users to the group. All managers will also have an employee account.

Optional Group: BSN-PartnerAdmins
   - Group Type: Security
   - Group Name: BSN-PartnerAdmins
   - Group Description: PII/PHI Protect Partner Administrator Role

- This user has the **highest** level of access and will have all administrative functions for all accounts within your portal. This group is to ONLY be used for your company's internal Security Awareness Training (SAT) account

Optional Group: Add the BSN-ManagerAdmins group to give select managers the ability to manage phishing campaigns as well as the bulk manage user functionality. Standard manager accounts do NOT have this functionality. Follow steps 2 - 3 using Group Name: BSN-ManagerAdmins and Group Description: PII/PHI Protect Manager Admin Role

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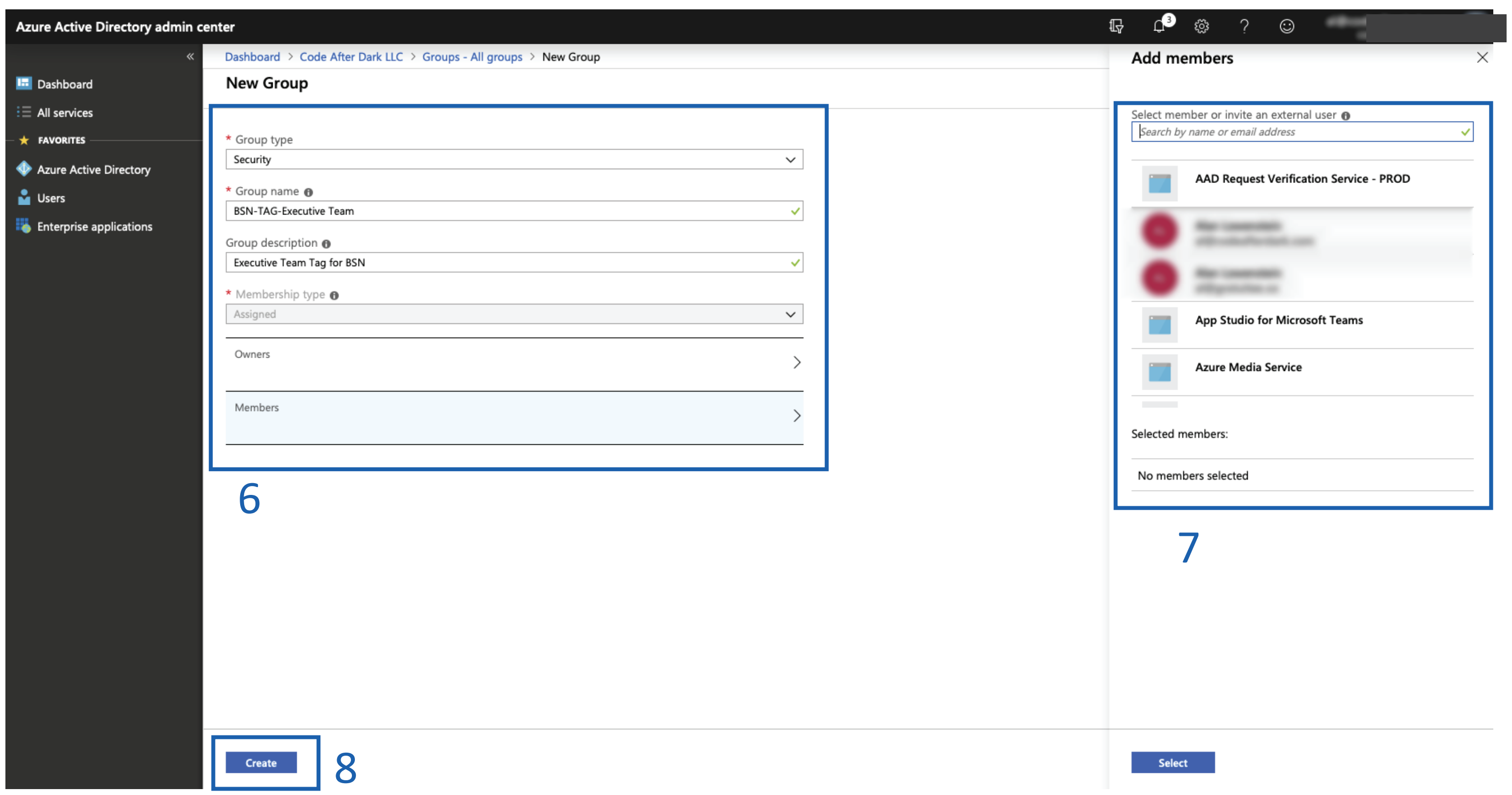

Important: For those using On-Premise along with Azure Sync to synchronize with the free tier or Azure AD: Nested group memberships are not supported for group-based assignment at this time.

6. **Optional:** Create Tag Groups.

Tags are used for creating specific groups, typically to separate users by department, to create groups you'd like to send specific phishing emails to, or to simplify tracking in the portal.

Group Type: Security
Group Name: BSN-TAG-tagname
*tagname will be the tag you want the users associated with.
Example: BSN-TAG-Executive Team, BSN-TAG-Finance, etc.
Group Description: Optional field if you would like to add details on the tag you created.

7. Assign users to the group.
8. Click "**Create**".

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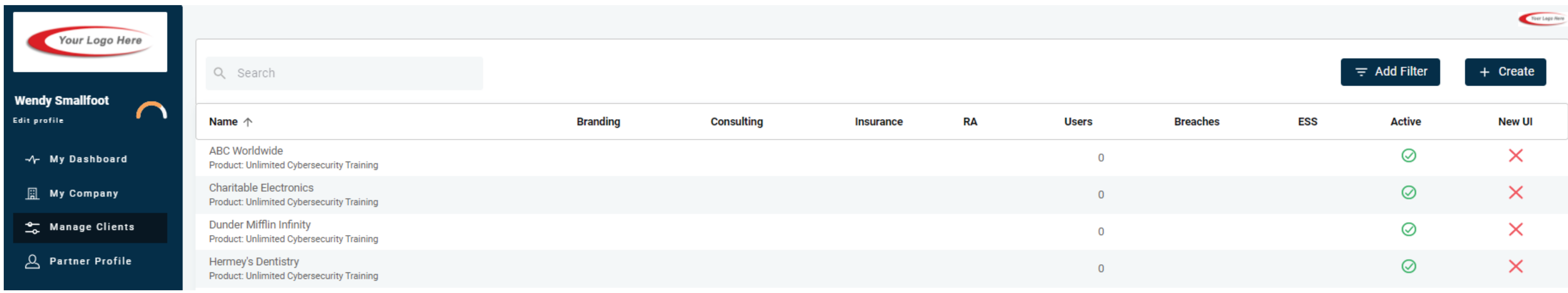
Configuration in the PII Protect Portal – Simple Setup

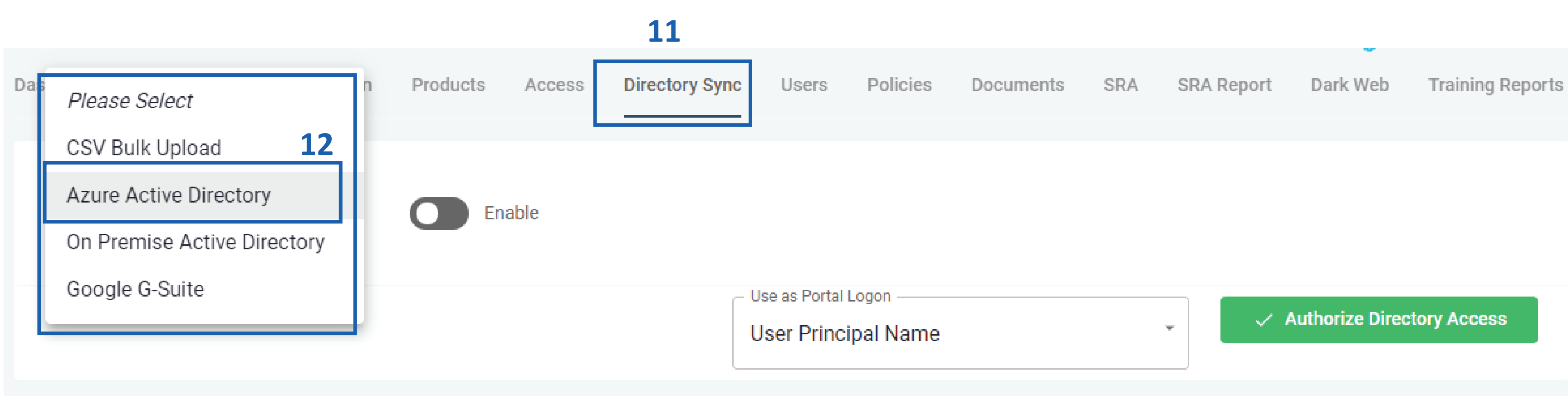


9. Login as a Partner Administrator to the PII-Protect portal [here](). Once logged in select "Manage Clients" to access your client list (above).

10. Select the client you want to sync with Azure Active Directory.

11. Select the "**Directory Sync**" tab

12. Use the Sync Type drop-down selector to select "Azure Active Directory"



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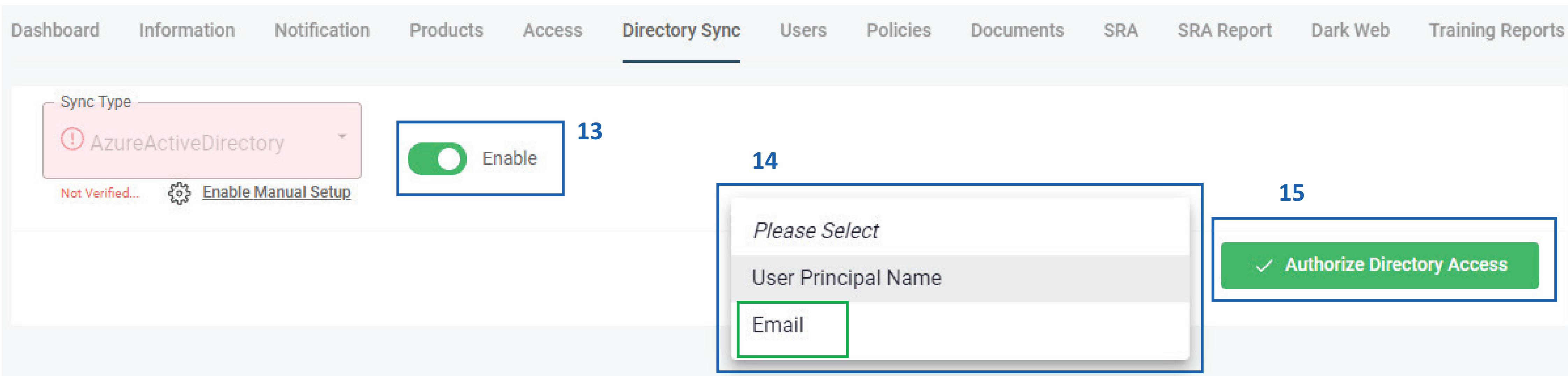
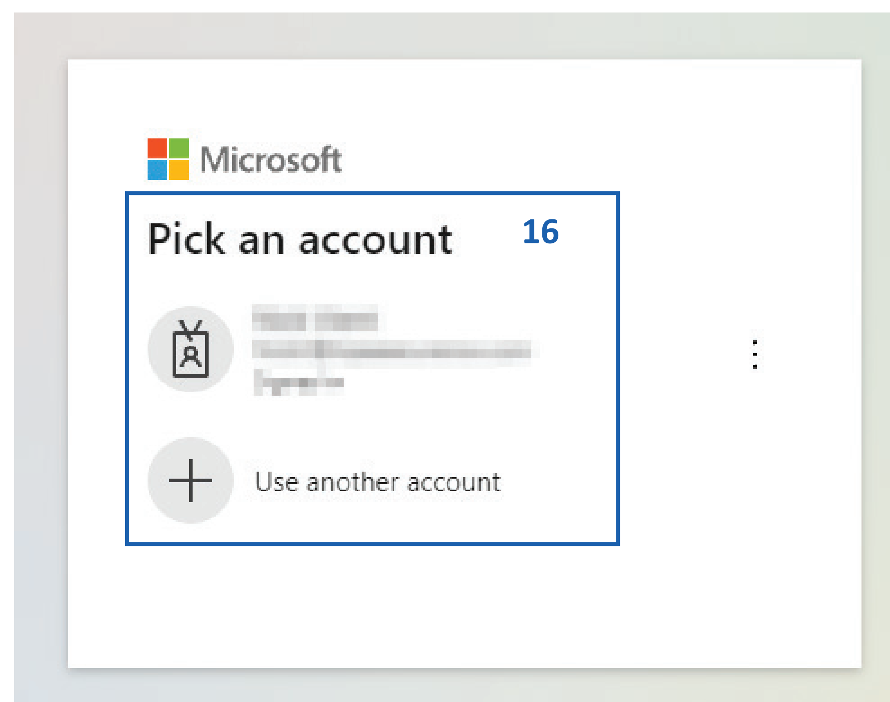


13. For Simple Setup, click the "**Enable**" button to begin (**not** the "Enable Manual Setup" button)
14. Select which option you would like to use as Portal Logon. **We highly recommend "Email"**
15. When ready, select the "**Authorize Directory Access**" button
16. You will be taken to the Microsoft sign on page. You MUST select/sign in with an account that is Global Admin within the client's tenant



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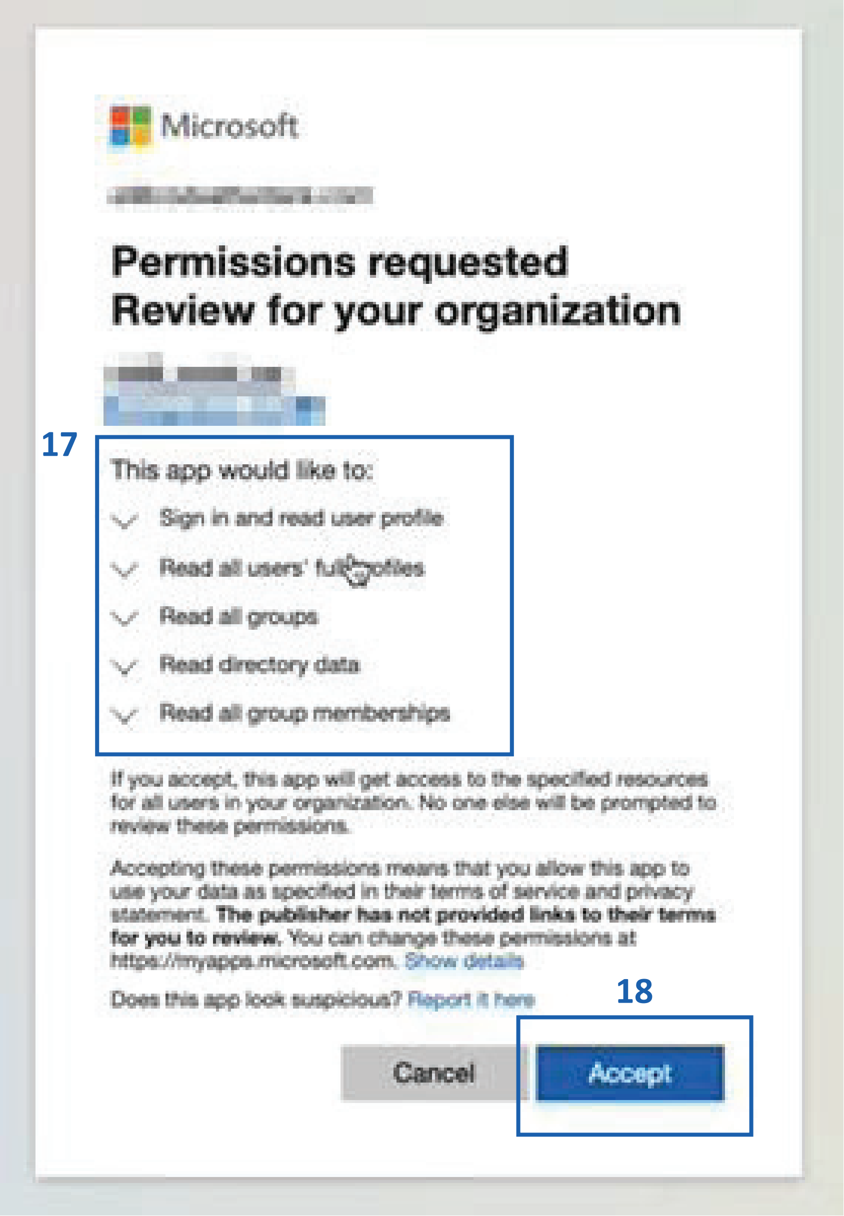
Configuration in the PII Protect Portal – Simple Setup

17. After signing into your Global Admin account within the tenant, you will be requested to accept the permissions required for this sync
18. Review the permissions then click "**Accept**"
19. A verification process will occur quickly to ensure that your account has the required access



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Configuration in the PII Protect Portal – Simple Setup

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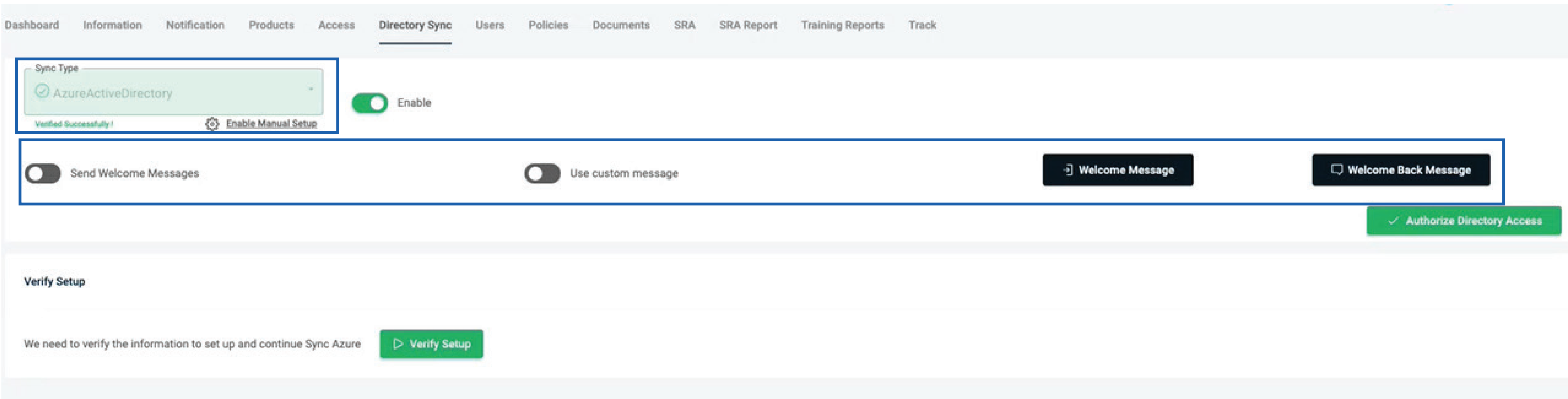


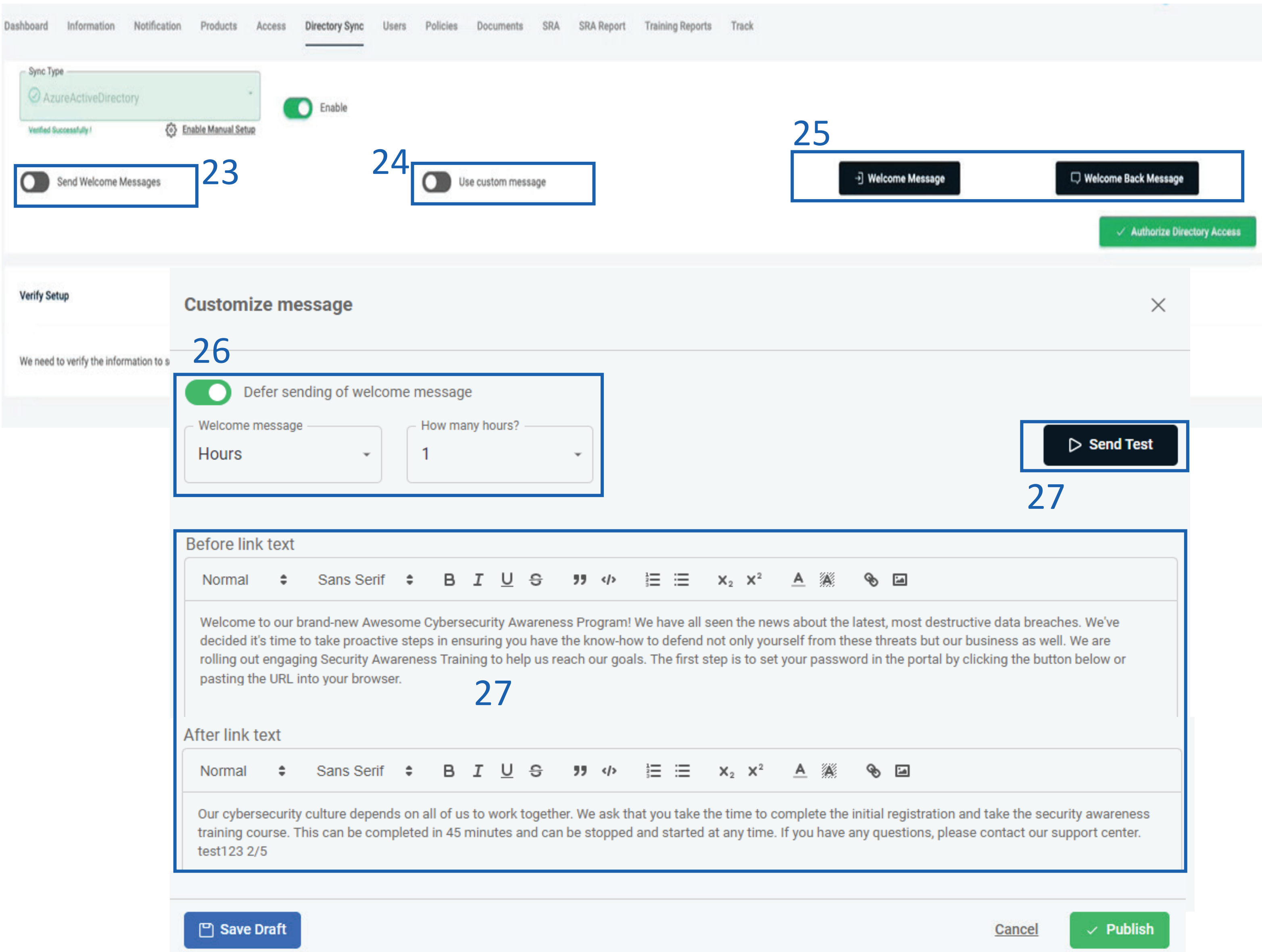
20. If successful, a "Verified Successfully!" notification will appear below the Azure Active Directory sync type

21. Before Authorizing Directory Access, we recommend configuring your Welcome Message options. More information on this is available in the next page.

Azure Active Directory Sync – Simple Setup

Setup Application Authentication with Azure AD on the client Azure AD Sync Settings Page. You will be required to run a Powershell Script and access Azure AD for the client you'll be configuring Application Authentication for.

Configure Messaging & Notification



Welcome Message: Email sent to new users added to the platform
Welcome Back Message: Email sent to reactivated users

22. You can configure how these welcome messages are sent to users during the sync.
23. "**Send Welcome Messages**" will send the welcome message to newly added employees during the sync.
24. "**Use Custom Message**" will enable welcome messages to be customized. Without this option checked, the standard messages will be sent based off the Global Messages in the Partner Profile.
25. Clicking "**Welcome Message**" or "**Welcome Back Message**" will allow you to adjust the message.
26. Messages can be deferred for a period of hours or days.
27. The text within the message can be adjusted and a test message can be sent to preview.

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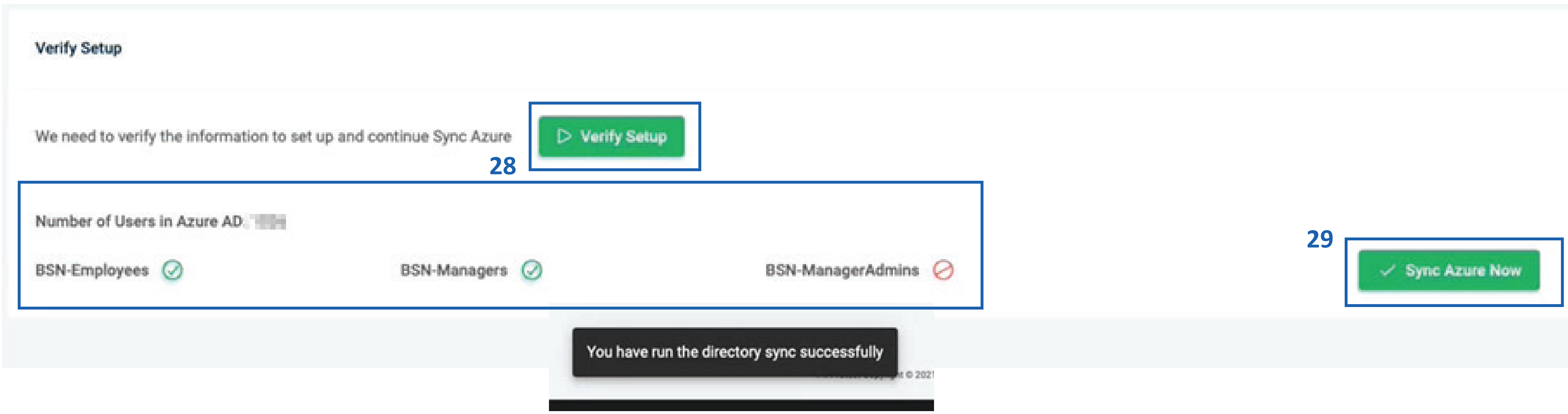

28. After you've set up your Message configurations, click the "**Verify Setup**" button – this will return the number of users within the Azure tenant and will confirm the sync groups used within the tenant

29. When you are ready, click the "**Sync Azure Now**" button. You will receive a confirmation at the bottom of the page that the sync has been run successfully!

You're all set!

- Depending on the user count within the tenant, the users should begin appearing within the User tab within the portal in **less than 5 minutes**!
- If your sync is in progress, you can't queue up multiple syncs. Please wait 15 minutes then retry if no users appear

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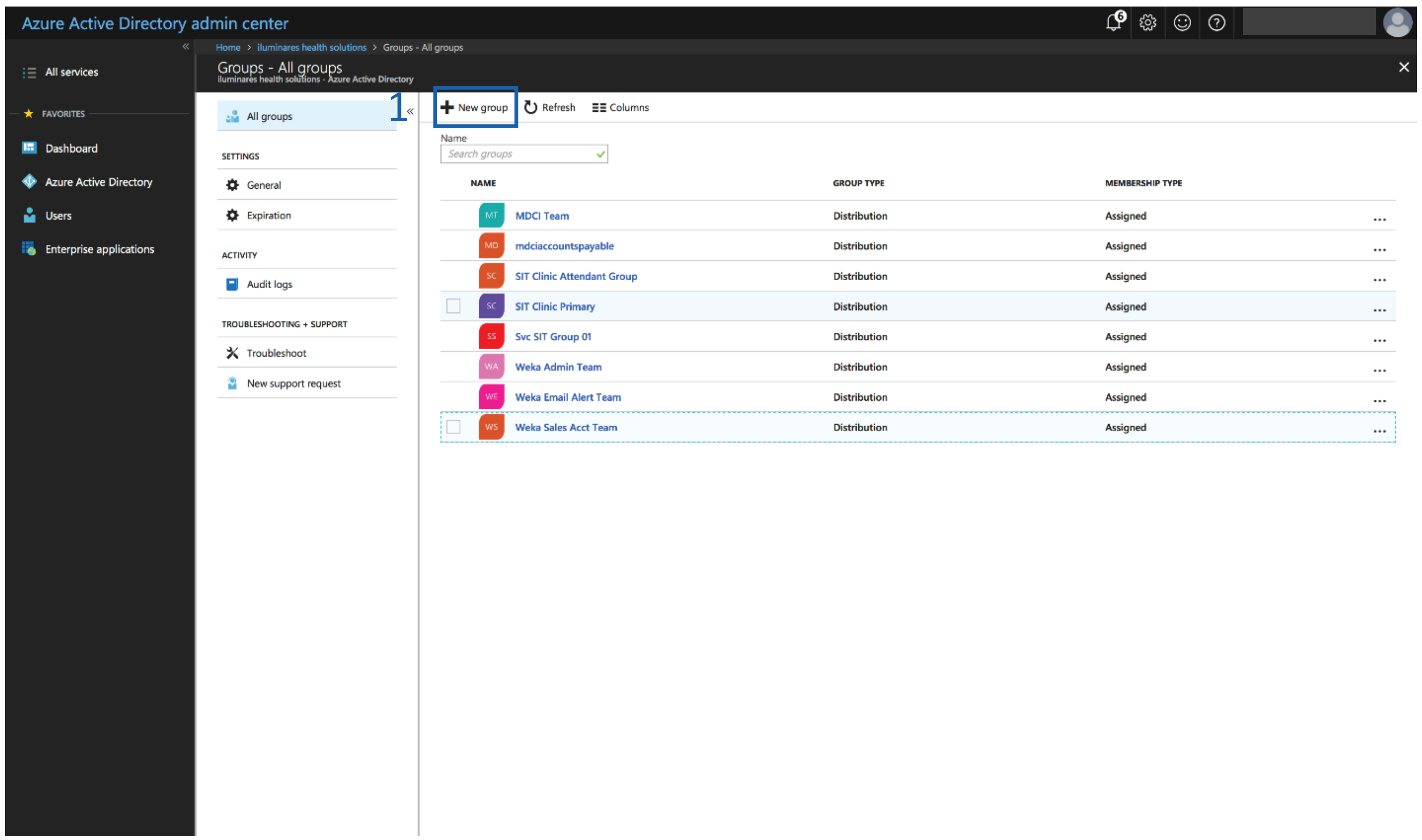

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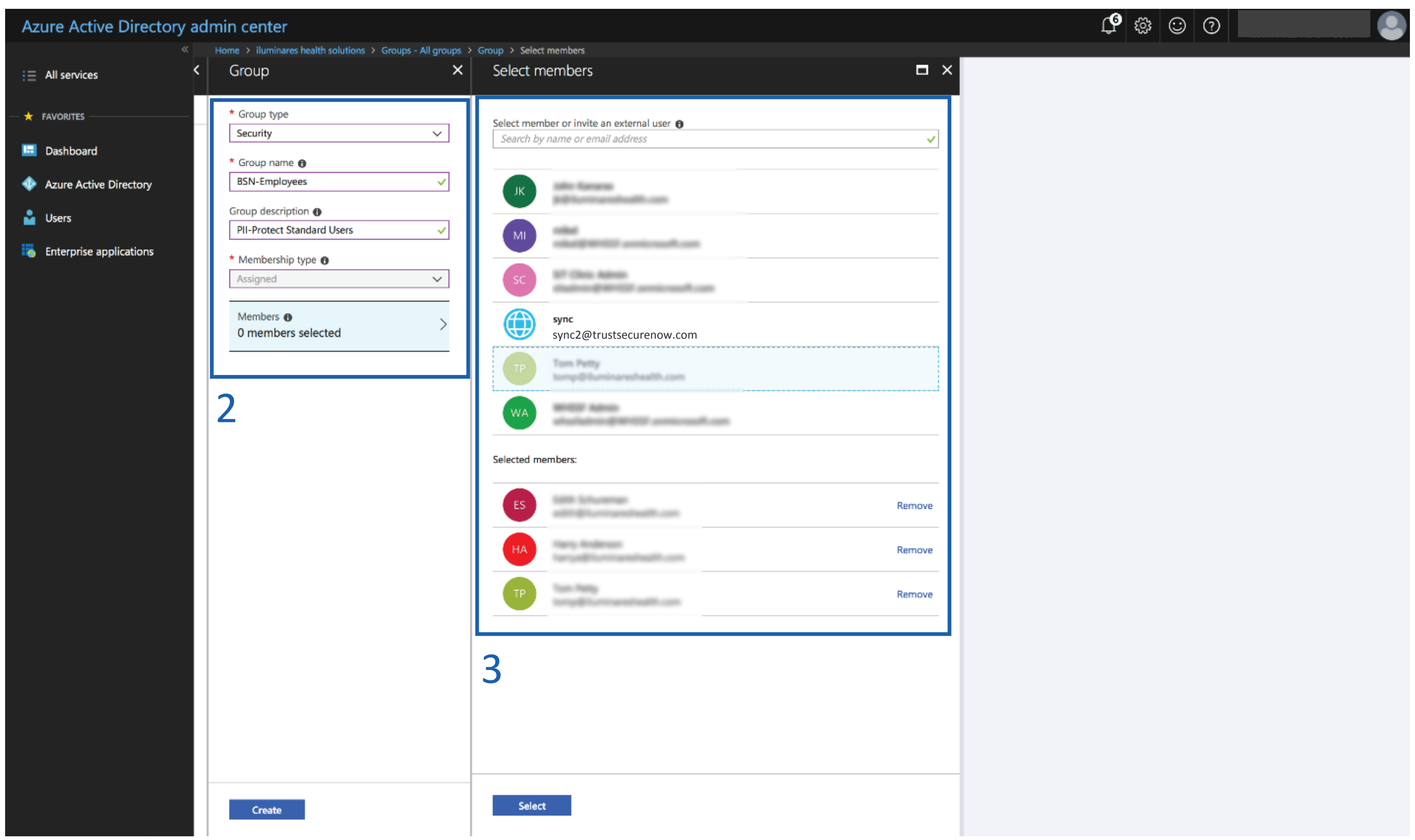

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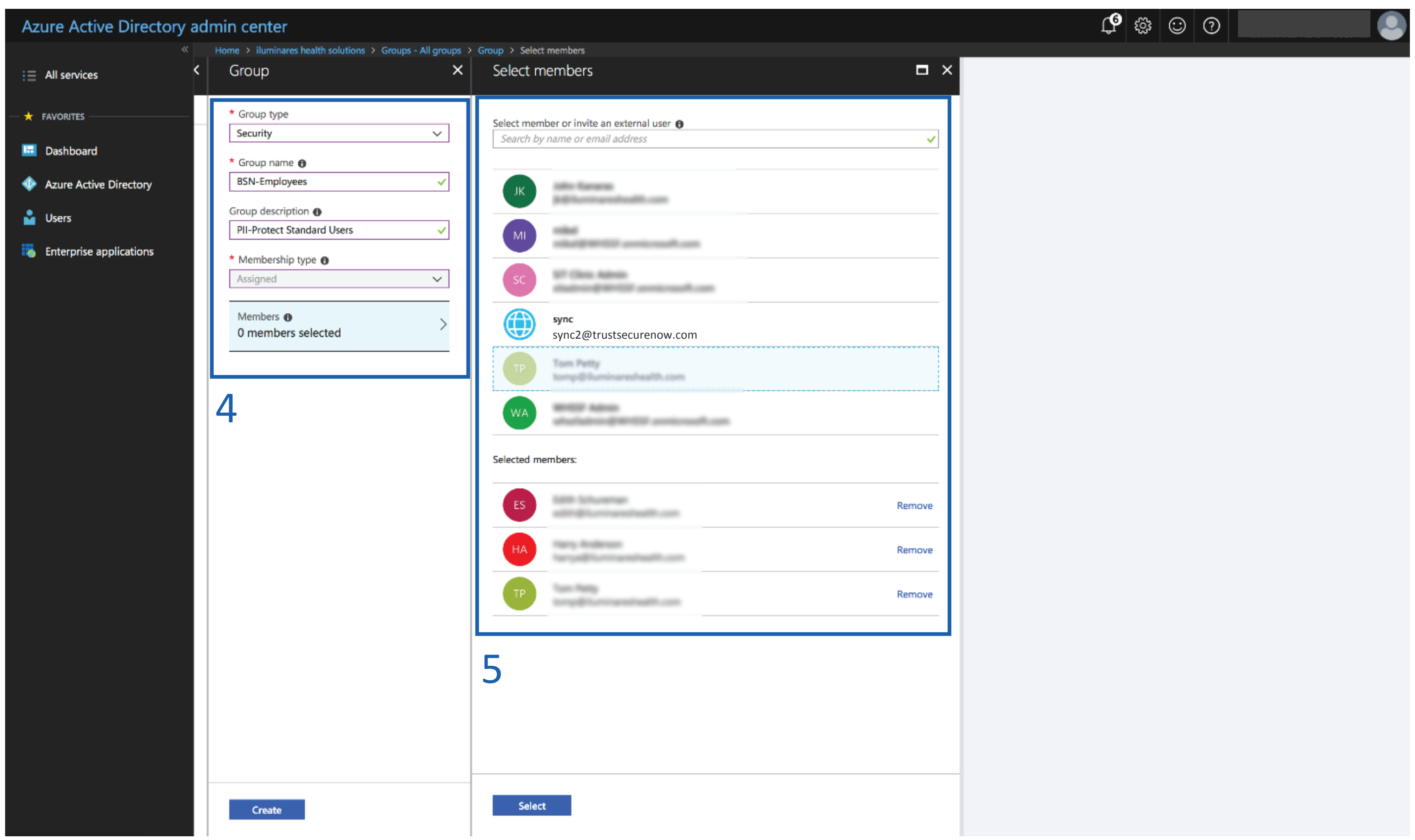

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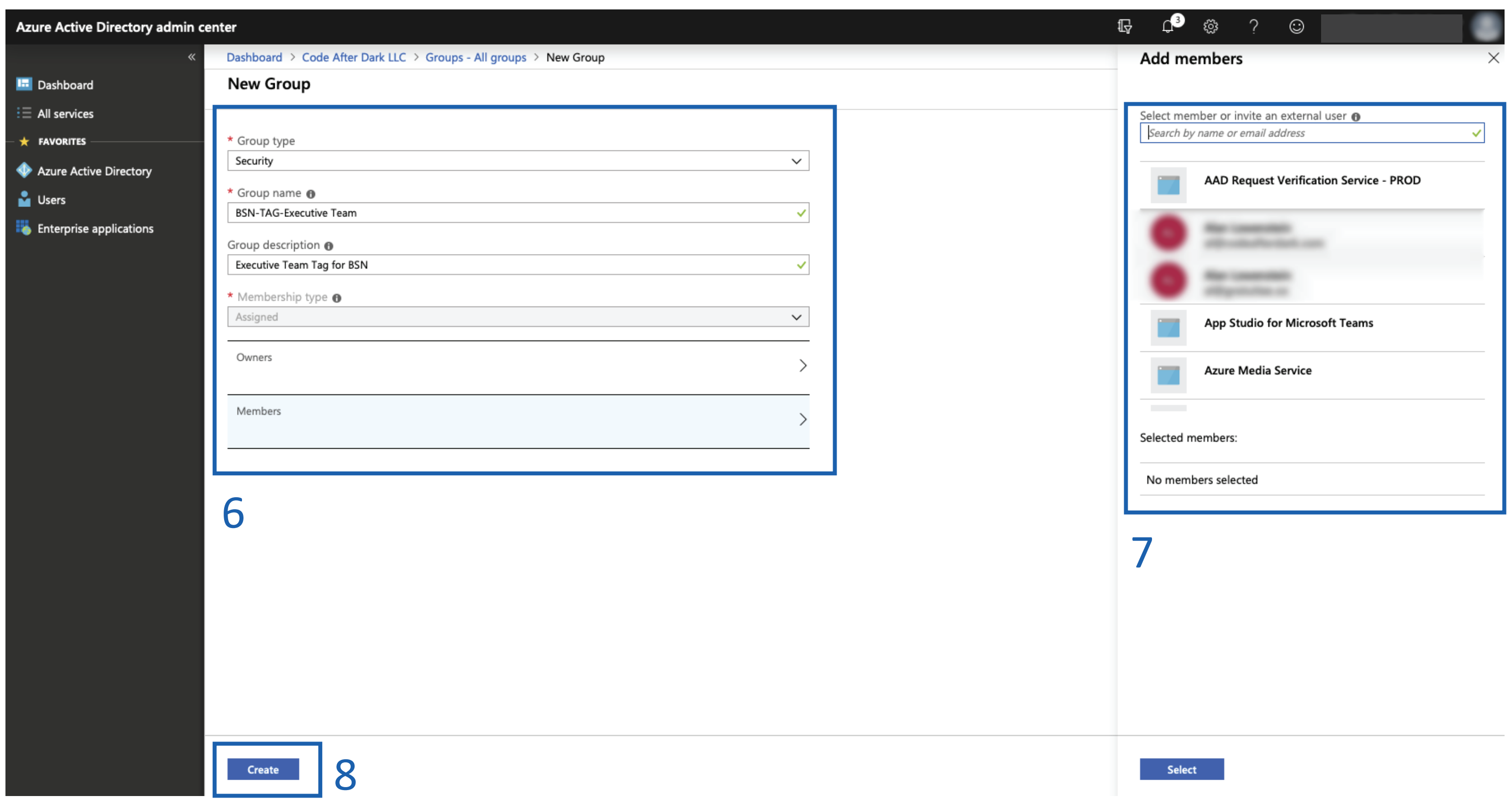

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7. Assign users to the group.
8. Click "**Create**".

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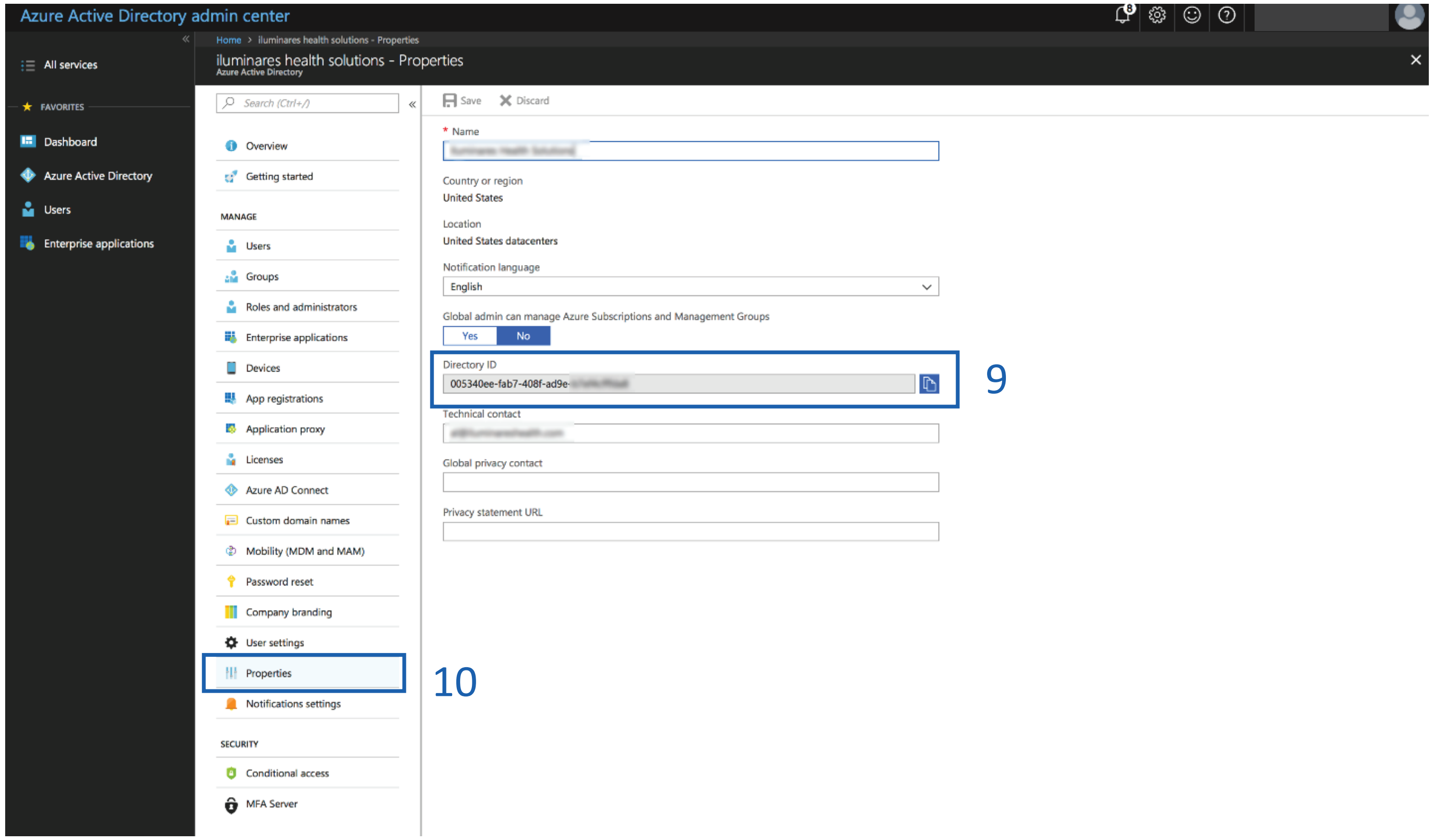

Sharing the Directory ID

9. Select the "**Properties**" tab.
10. Locate the "**Directory ID**" field and press the Copy button – The Directory ID information will identify this Azure Active Directory to the AAD Sync process. This value will be important in step 25 on page 23.

Important: Confirm that the email addresses of any current users in the portal (userID) are the same as their email address (userID) in Azure AD or else duplicate users will be created.

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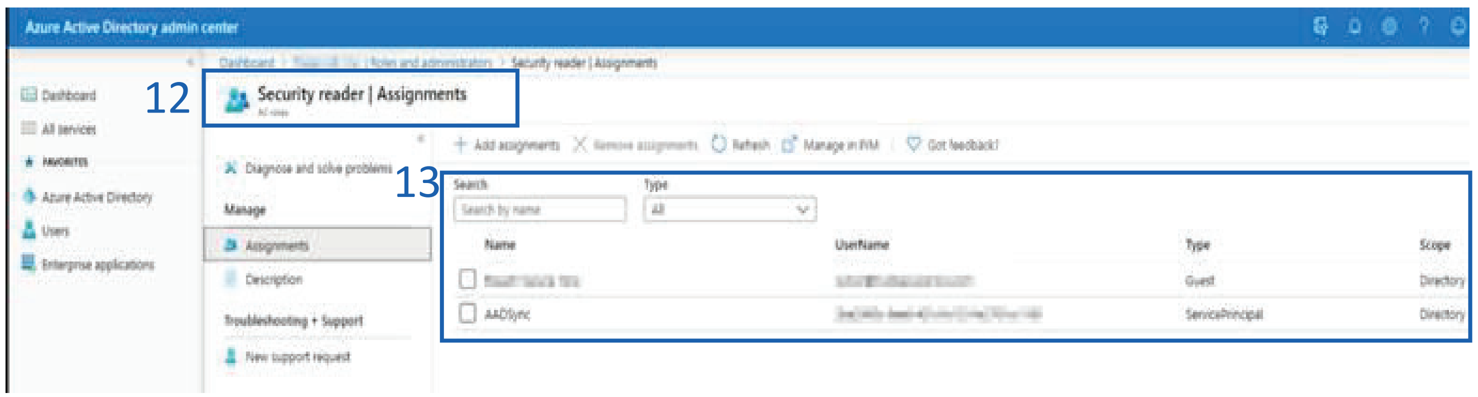
Setup in Microsoft 365 Admin Center



Assigning the Security Reader Role

11. Navigate to Roles
12. Search for the Security Reader Role and click on Assignments
13. Assign the role to a user that has global admin privileges

Important: The Security Reader Role must be assigned to at lease one user otherwise step 31 will produce errors

Azure Active Directory Sync – Classic Setup

Our Azure Active Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Configuration in the PII Protect Portal

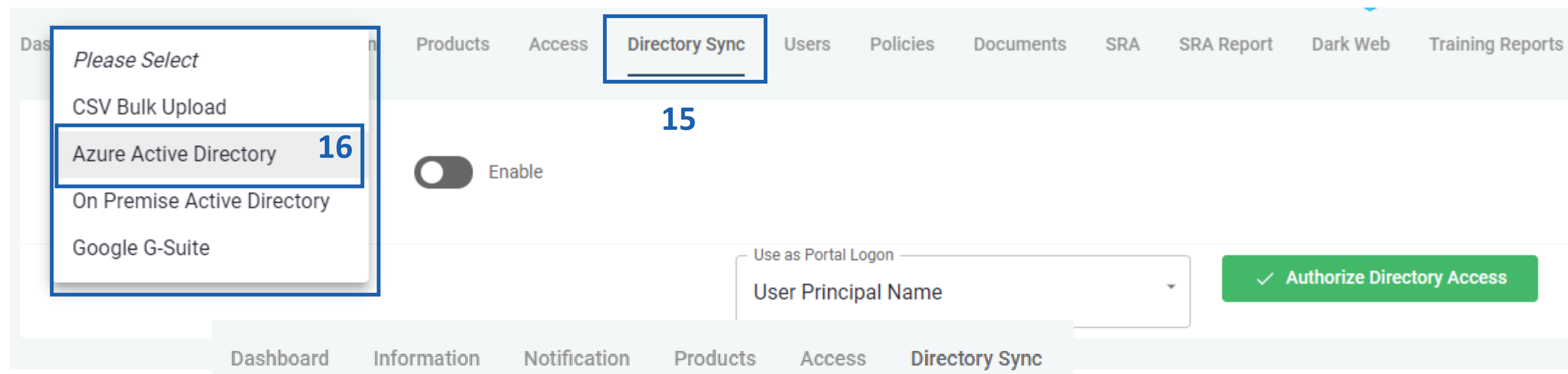
14. Login as a Partner Administrator to the PII-Protect portal [here](). Once logged in select "Manage Clients" to access your client list and select the client you want to sync with Azure Active Directory.

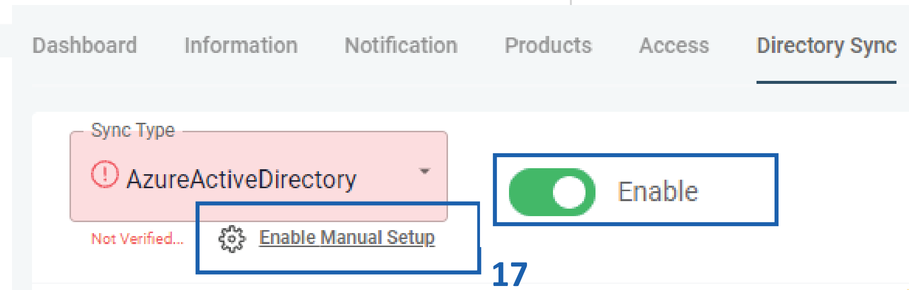
15. Select the "**Directory Sync**" tab

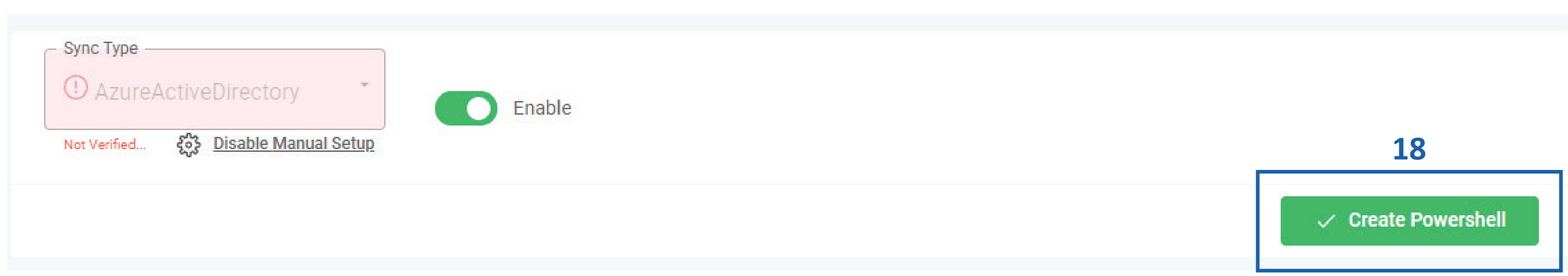
16. Use the Sync Type drop-down selector to select "Azure Active Directory"

17. Click the "**Enable Manual Setup**" button then click the "**Enable**" button

18. Click the "**Create Powershell**" button





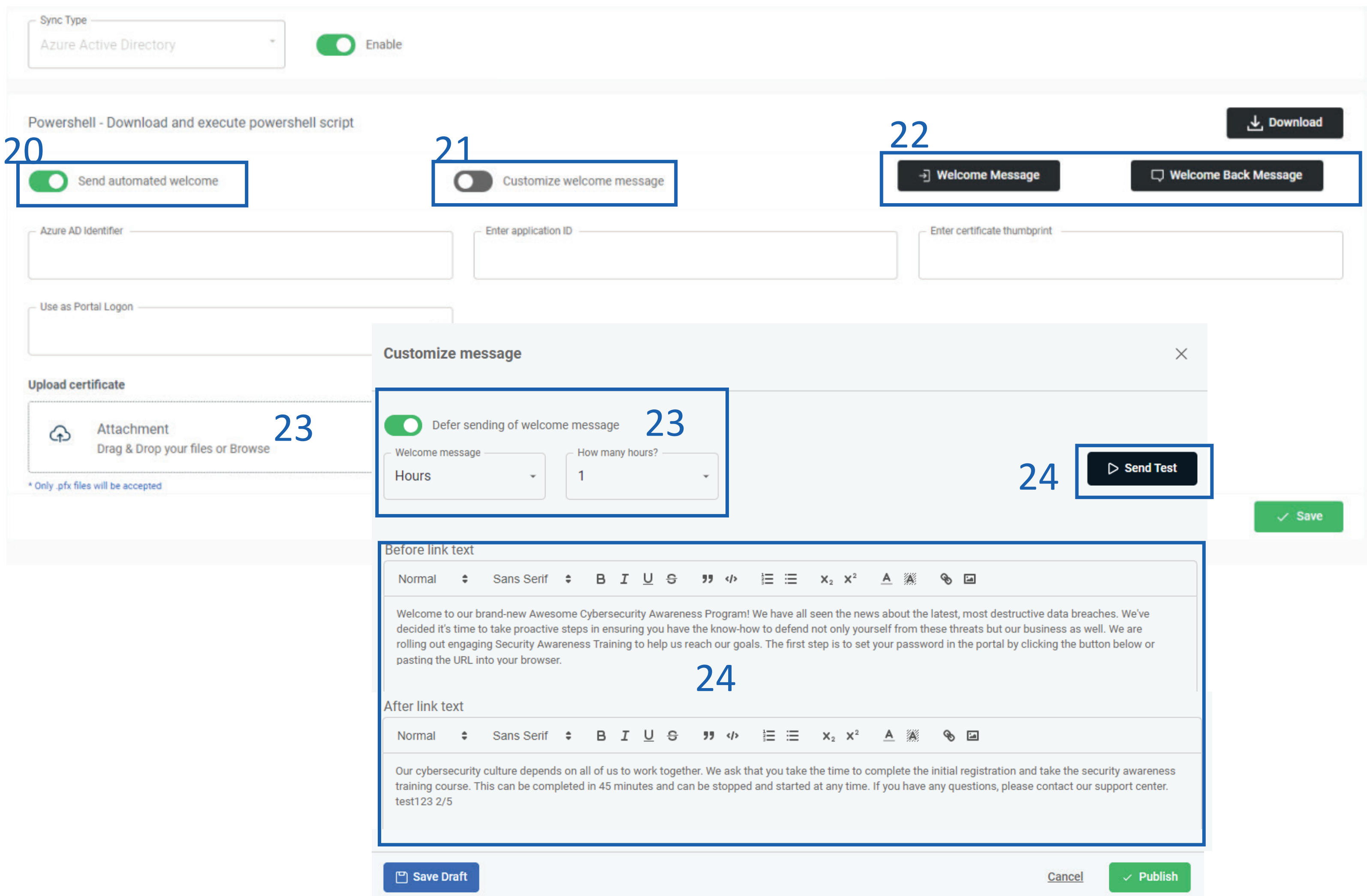


Important: These instructions are for Classic Azure setup. For Simple Setup, navigate to page 6.

Azure Active Directory Sync – Classic Setup

Setup Application Authentication with Azure AD on the client Azure AD Sync Settings Page. You will be required to run a Powershell Script and access Azure AD for the client you'll be configuring Application Authentication for.

Configure Messaging & Notification - Azure AD Sync Settings Page



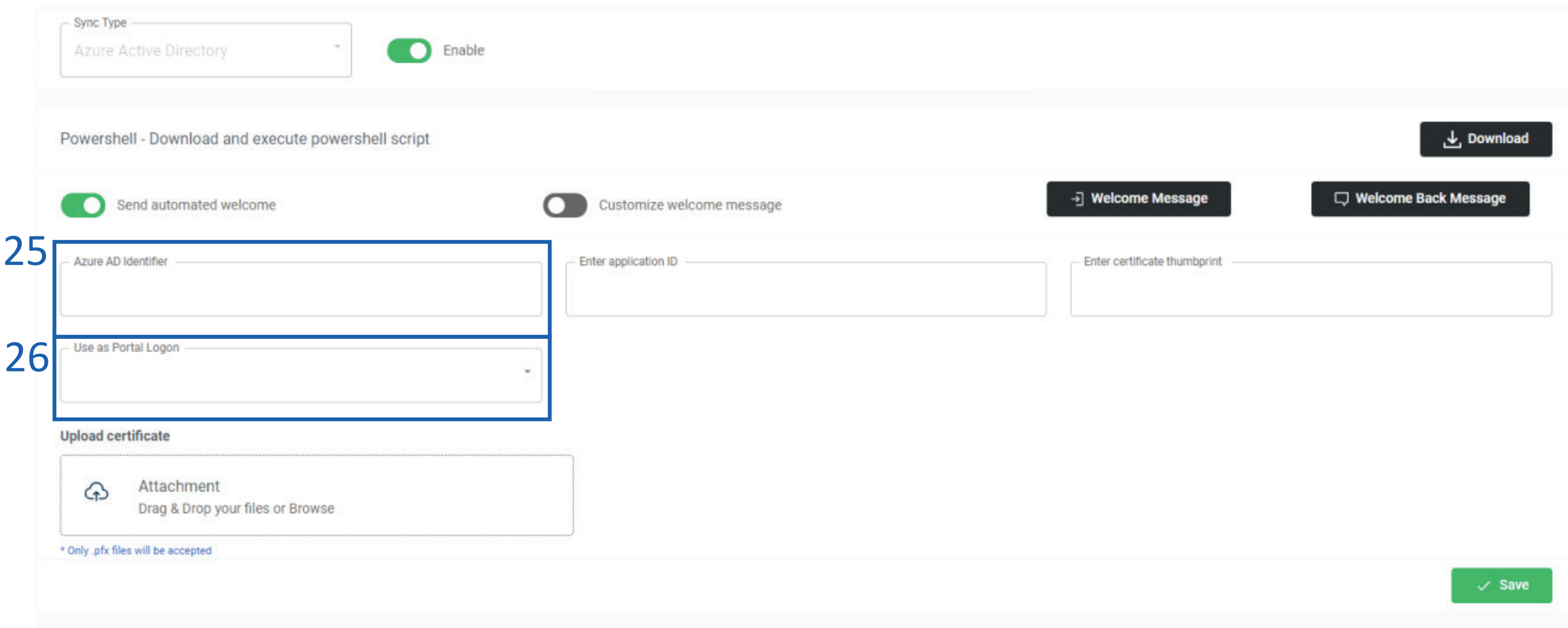
19. You can configure how these welcome messages are sent to users during the sync.
20. "**Send automated welcome**" will send the welcome message to newly added employees during the sync.
21. "**Customize welcome message**" will enable welcome messages to be customized. Without this option checked, the standard messages will be sent based off the Global Messages in the Partner Profile.
22. Clicking "**Welcome Message**" or "**Welcome Back Message**" will allow you to adjust the message.
23. Messages can be deferred for a period of hours or days.
24. The text within the message can be adjusted and a test message can be sent to preview.

Welcome Message: Email sent to new users added to the platform
Welcome Back Message: Email sent to reactivated users

Azure Active Directory Sync – Classic Setup

Our Azure Active Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Configuring Application Authentication - Azure AD Sync Settings Page



25. Paste the Azure Directory ID into the text box under "**Azure AD Identifier**". Note: Copy and paste the AAD Identifier (Directory ID) to mitigate translation error. Refer to page 19 to find your directory ID.

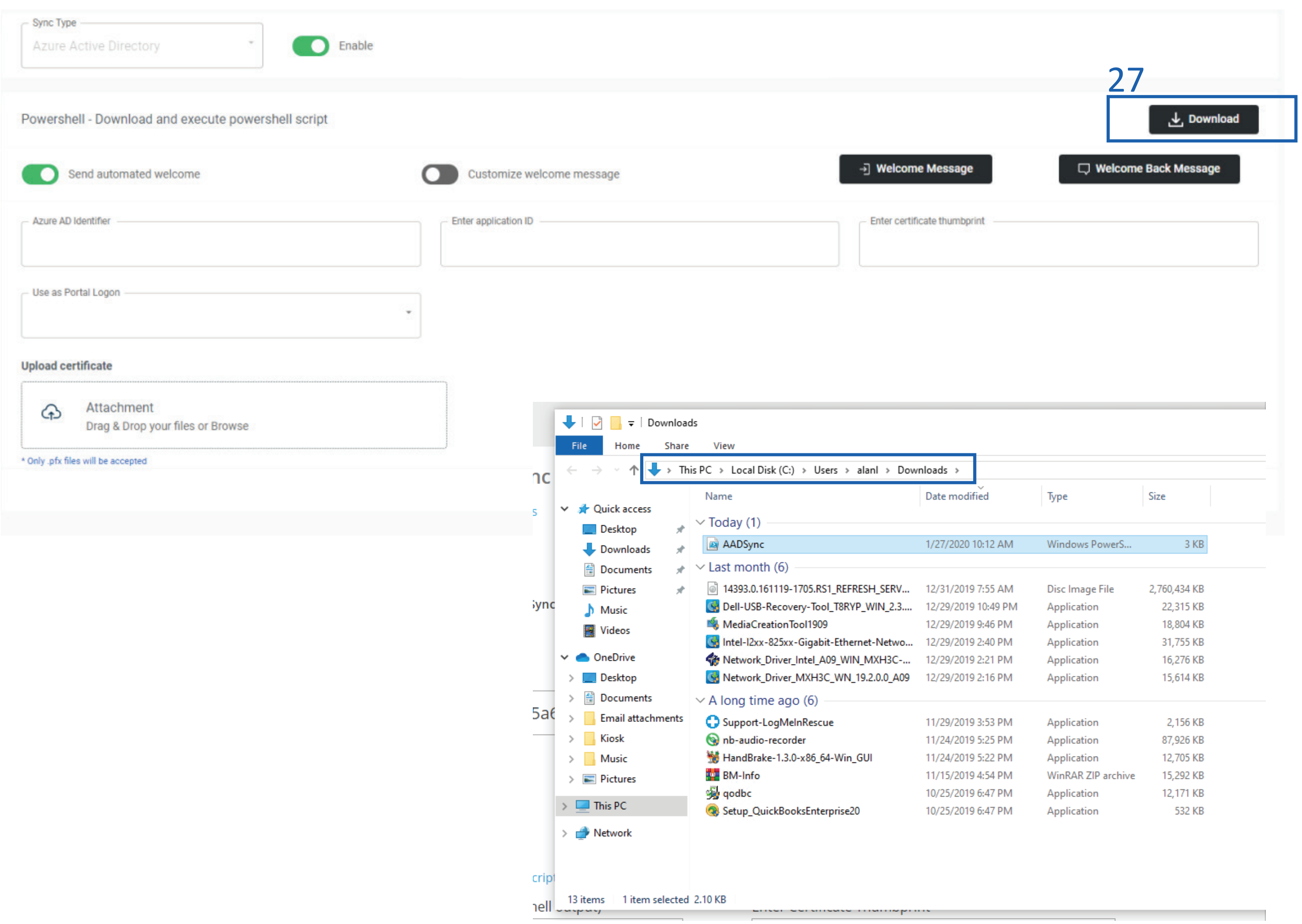
26. Click the "**Use as Portal Logon**" dropdown to choose between Email and UserPrincipalName as the user logon Username. **We highly recommend "Email"**

Important: Once Azure Active Directory is activated; you will not be able to add users to the portal outside of this method. Our portal will sync once every hour, which may cause a delay for your users to be updated.

Azure Active Directory Sync – Classic Setup

Setup Application Authentication with Azure AD on the client Azure AD Sync Settings Page. You will be required to run a Powershell Script and access Azure AD for the client you'll be configuring Application Authentication for.

Configuring Application Authentication - Azure AD Sync Settings Page

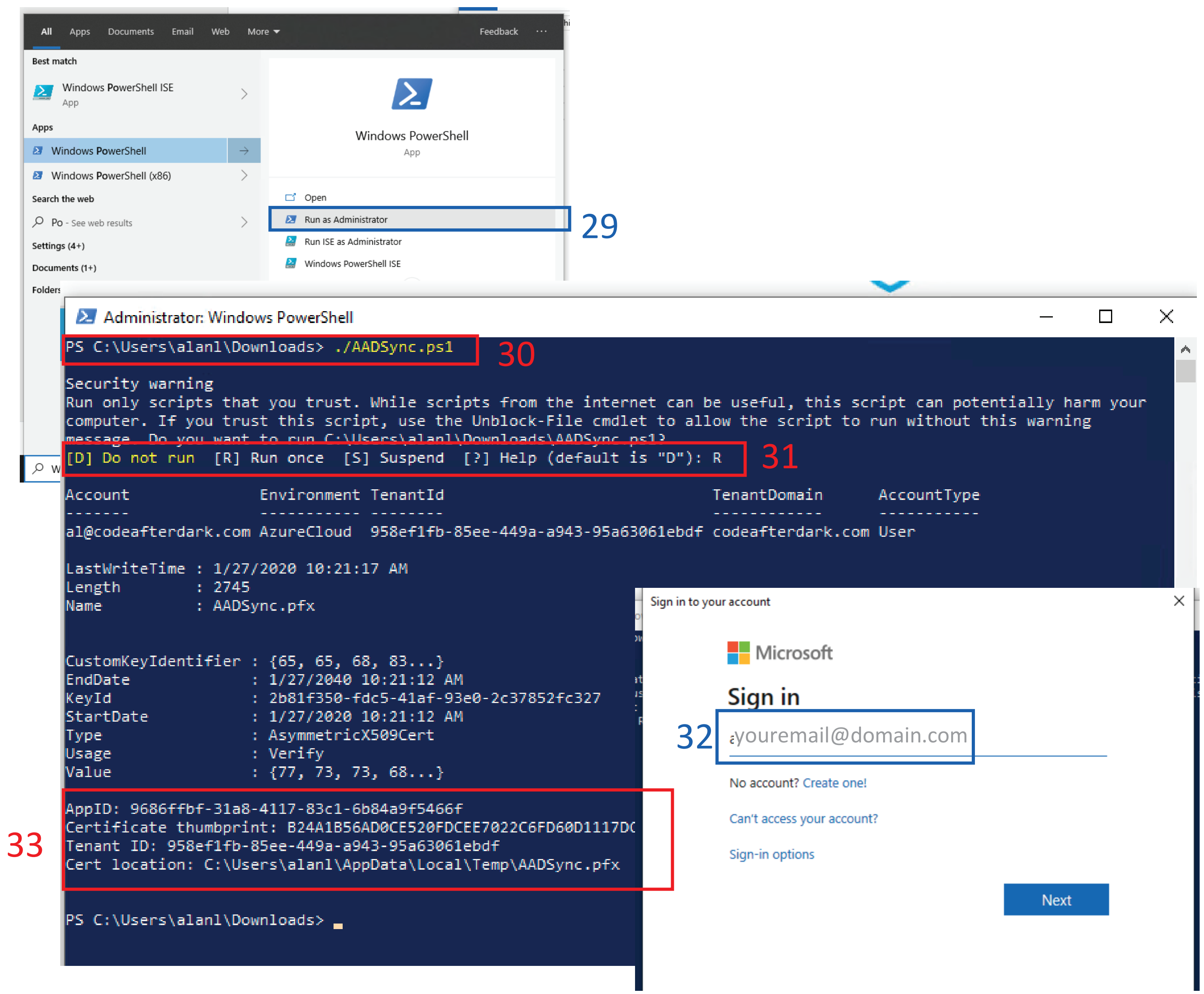


27. Click "**Download**" to download the powershell script
28. Click "**Show in Folder**" to open your File Explorer and note the file path.

Azure Active Directory Sync – Classic Setup

Setup Application Authentication with Azure AD on the client Azure AD Sync Settings Page. You will be required to run a Powershell Script and access Azure AD for the client you'll be configuring Application Authentication for.

Configuring Application Authentication – in Windows Powershell

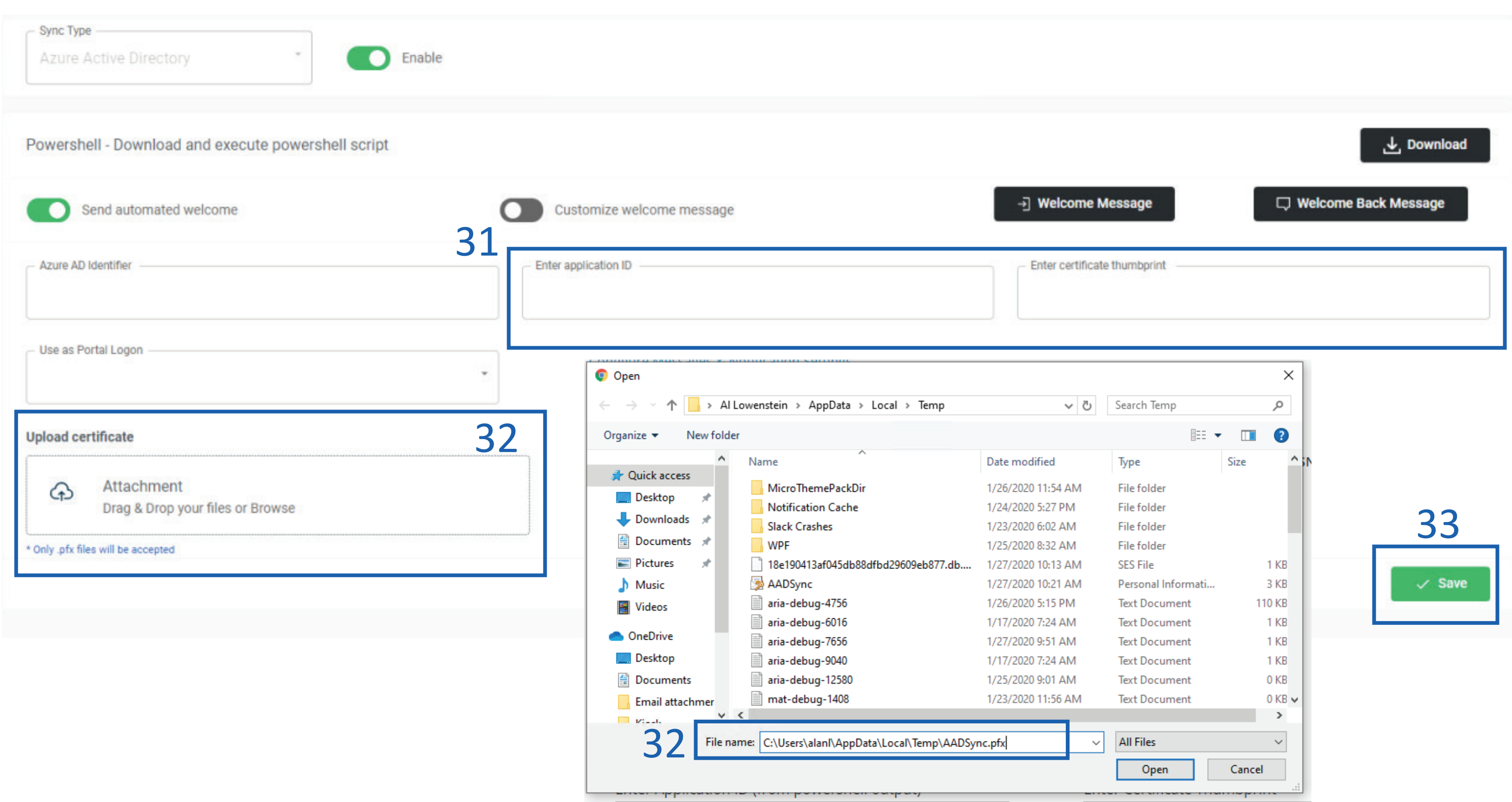


29. Run Windows Powershell as an Administrator
30. Navigate to the directory where the script is located as noted in step 28.
31. Install **AzureAD Module** and set execution policy to unrestricted. Then, execute the AADSync.ps1 Powershell script. Enter "R" to **Run once**
32. You will be prompted to sign into the Azure Account you are configuring Application Authentication for.
33. Note the information displayed when the script has completed running: AppID, Certificate thumbprint, and Cert location.

Azure Active Directory Sync – Classic Setup

Setup Application Authentication with Azure AD on the client Azure AD Sync Settings Page. You will be required to run a Powershell Script and access Azure AD for the client you'll be configuring Application Authentication for.

Configuring Application Authentication – Client Azure AD Sync Settings Page



34. Copy the Application ID and Certificate Thumbprint from the script and paste them into the "**Enter Application ID**" and "**Enter Certificate Thumbprint**" fields, respectively.

35. Click "**Attachment**" under the Upload Certificate section and paste the Certificate location file path in the "File Name" field in the file explorer and click "**Open**"

36. Click "**Save**" to save your changes.

Repeat steps 1-36 for each client!

Congratulations! Your client has been set up with Azure AD Sync!

Important: Once Azure Active Directory is activated; you will not be able to add users to the portal outside of this method. Our portal will sync once every hour, which may cause a delay for your users to be updated.

Note: The initial sync may take between 3 to 5 hours before users appear in your portal. After the initial sync, updates are processed hourly.

On-Premise Active Directory Sync Setup

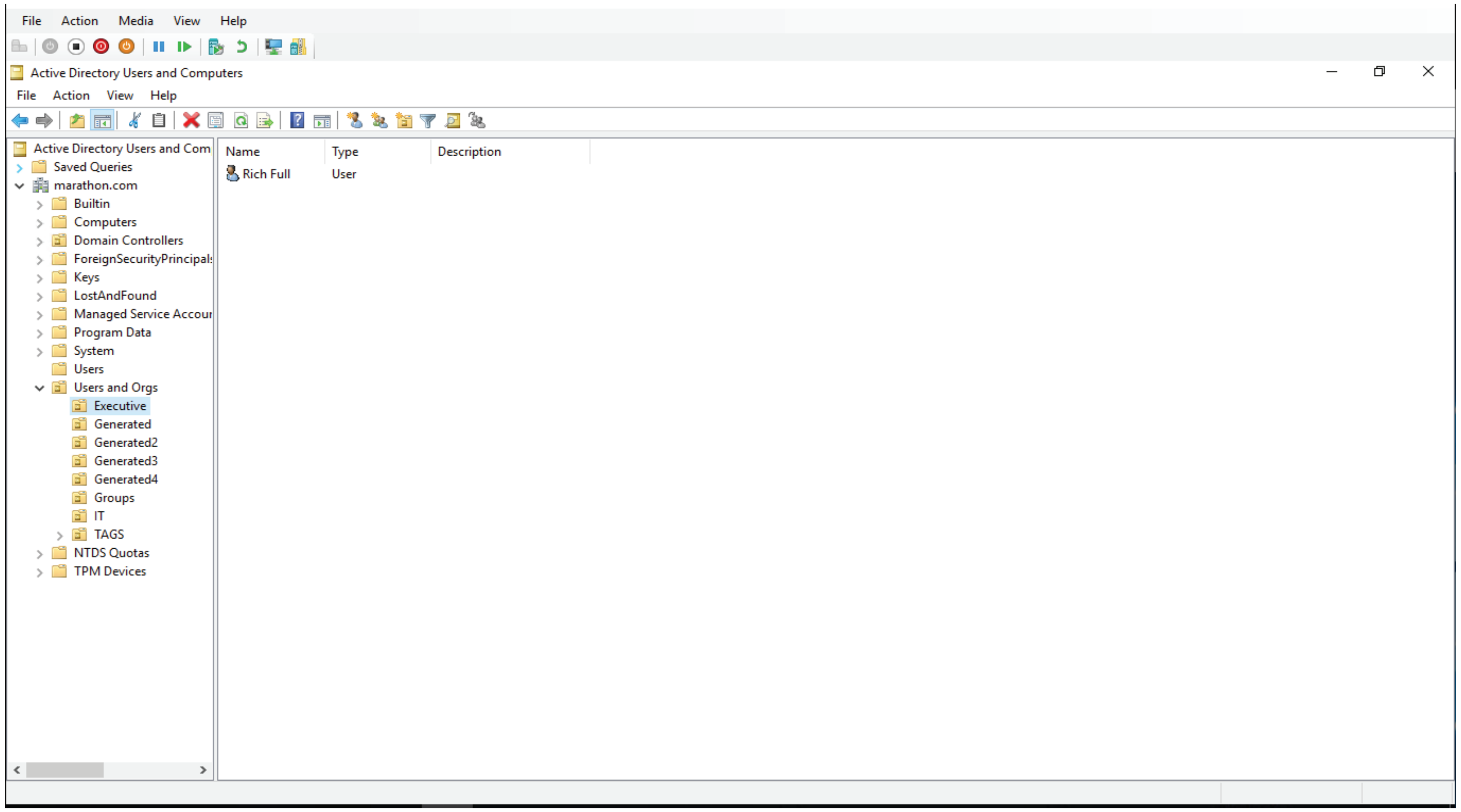
Simply configure your settings inside the Active Directory application, install our home -grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

Setup in Active Directory Users and Computers Application

Our On-Premise Active Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Note: Any previous setups using Rocket Cyber will continue to sync and the tool can still be utilized for future syncs. For more information on the Rocket Cyber On-Premise sync options, please contact: support@telesystem.us

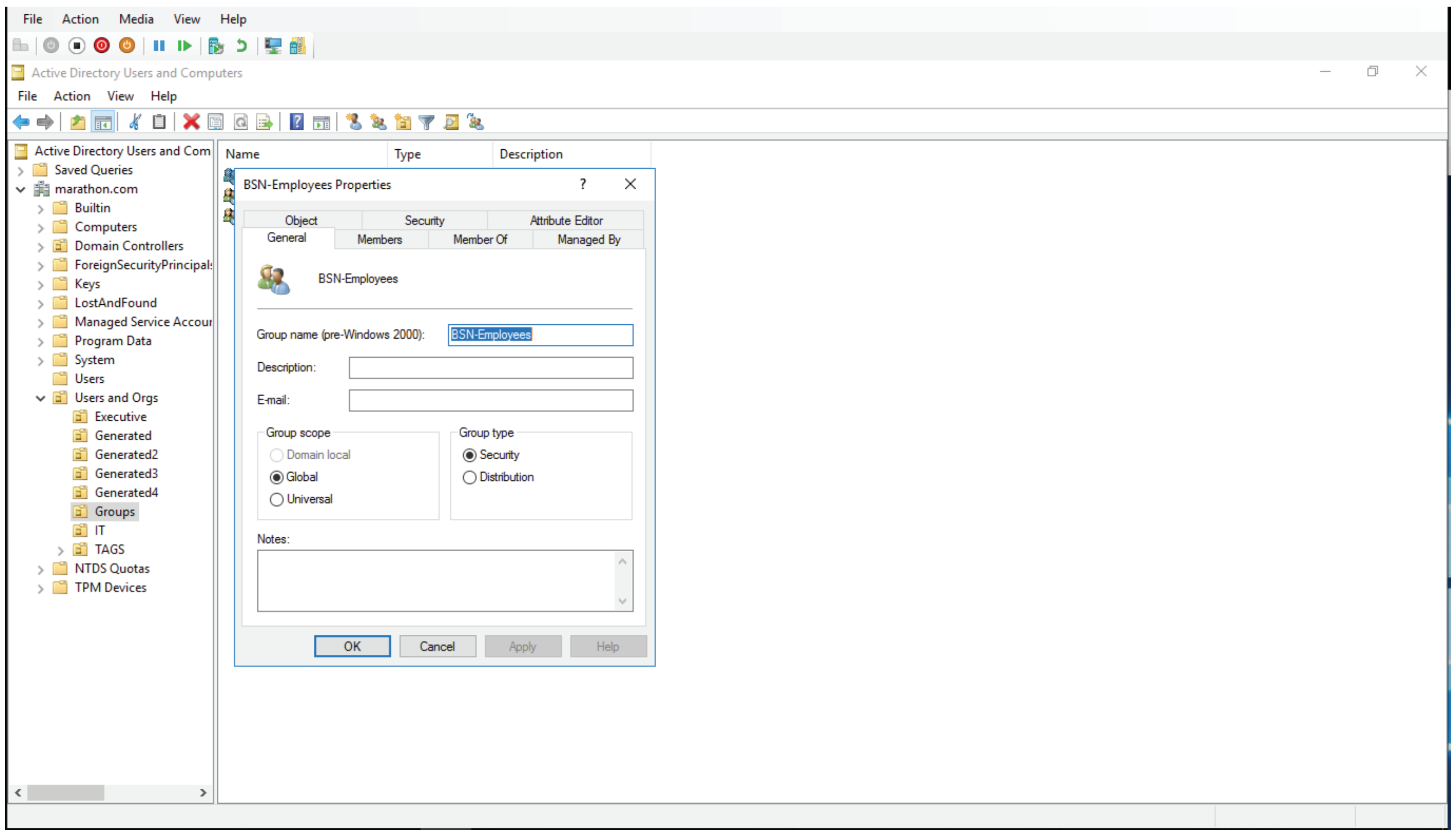
1. Open the Active Directory Users and Computers application



On-Premise Active Directory Sync Setup

Simply configure your settings inside the Active Directory application, install our home-grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

Setup in Active Directory Users and Computers Application



Important: Nested groups are not support. This means you cannot have a standard group for all employees and then include the employees' group in the BSN-Employees group. Each user must be placed individually within each of the BSN groups.

2. Under the "Users and Orgs" folder, right-click the "Groups" folder and click New → Group to create the **BSN-Employees** group with the following parameters:

Group Type: Security

Group Name: BSN-Employees

Group Description: PII/PHI Protect Standard Users

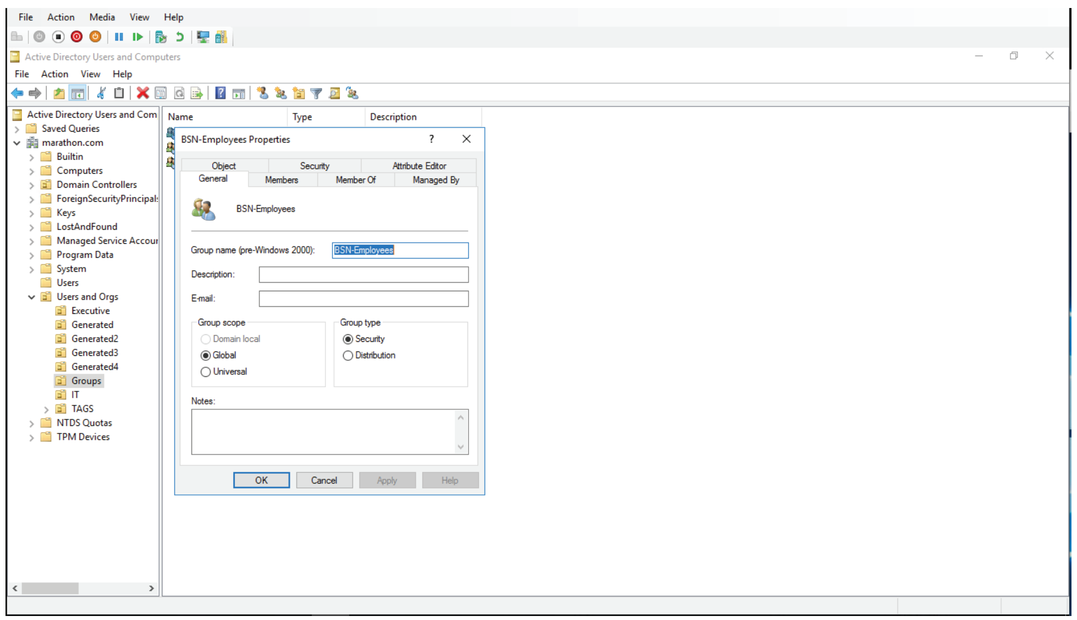
3. Add users that should have standard employee access to the PII/PHI Protect Portal

Note: Be sure not to assign non-user accounts to this group as portal accounts WILL be created for all users assigned to this group. If you assign users to this group and to the BSN-Manager group, the manager role will take precedence.

On-Premise Active Directory Sync Setup

Simply configure your settings inside the Active Directory application, install our home-grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

Setup in Active Directory Users and Computers Application



Important: When entering the above security groups, spaces are NOT permitted before, after, or within the string. The highest access level group will take precedence. For example, a user in the BSN-Managers group do not need to be added to the BSN-Employees group.

4. Create the following optional groups with the same parameters:

BSN-Managers – For client manager access

Group Description: PII/PHI Protect Manager Role

- Only assign users to this group that should have manager access and view employee progress.

BSN-ManagerAdmins – For client administrator-level access

Group Description: PII/PHI Protect Manager Admin role

- Only assign users to this group that should have manager access, view employee progress, manage phishing campaigns, and bulk upload users. Standard manager accounts do not have this functionality.

BSN-PartnerAdmins – for your internal MSP account only

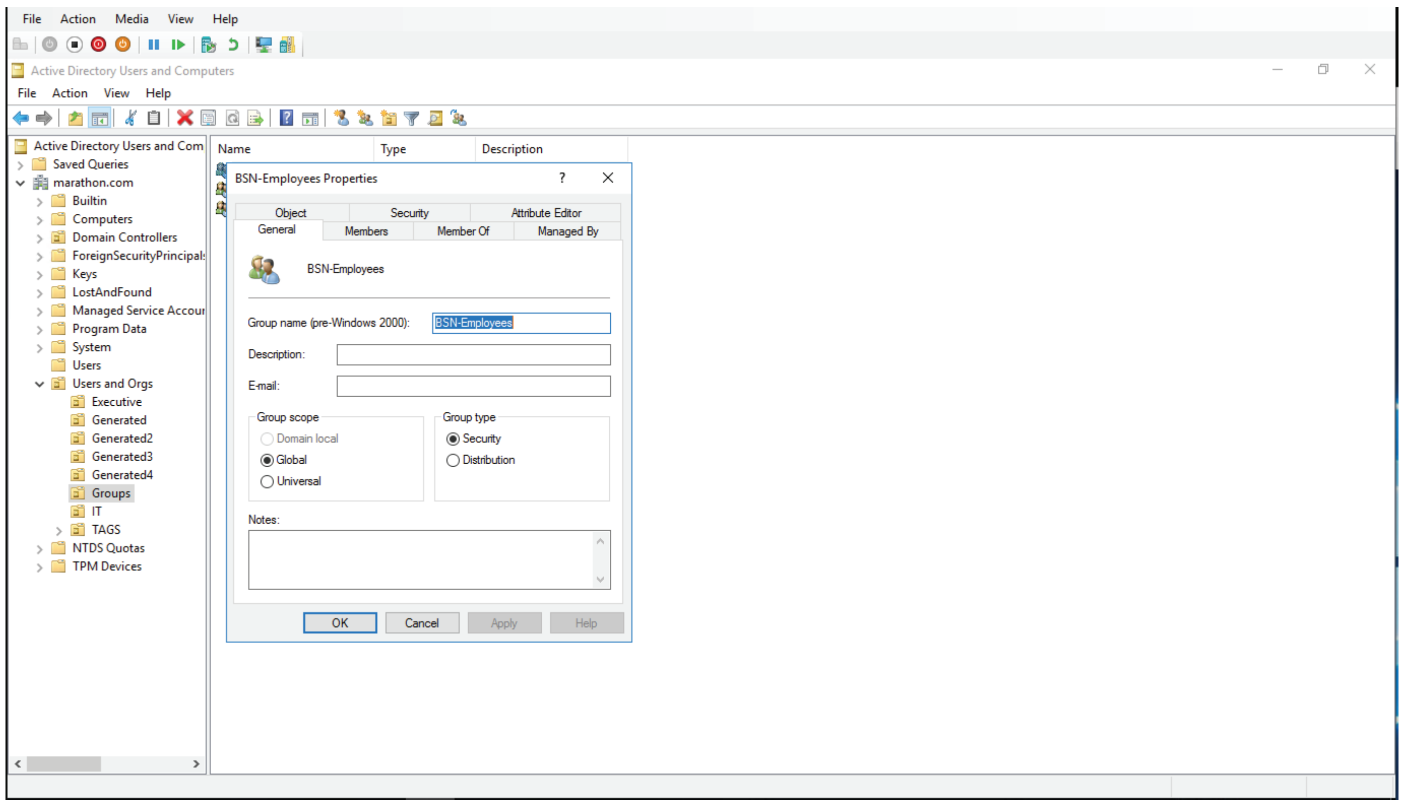
Group Description: PII/PHI Protect Partner Administrator Role

- This user has the **highest** level of access and will have all administrative functions for **all accounts** within your portal. This group is to ONLY be used for your company's internal Security Awareness Training (SAT) Account

On-Premise Active Directory Sync Setup

Simply configure your settings inside the Active Directory application, install our home-grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

Setup in Active Directory Users and Computers Application



Note: Use tags to track metrics for specific departments and sent targeted phishing campaigns.

5. **Optional:** Create Tag Groups.

Tags are used for creating specific groups, typically to separate users by department, to create groups you'd like to send specific phishing emails to, or to simplify tracking in the portal.

Group Type: Security

Group Name: BSN-TAG-tagname

*tagname will be the tag you want the users associated with.

Example: BSN-TAG-Executive Team, BSN-TAG-Finance, etc.

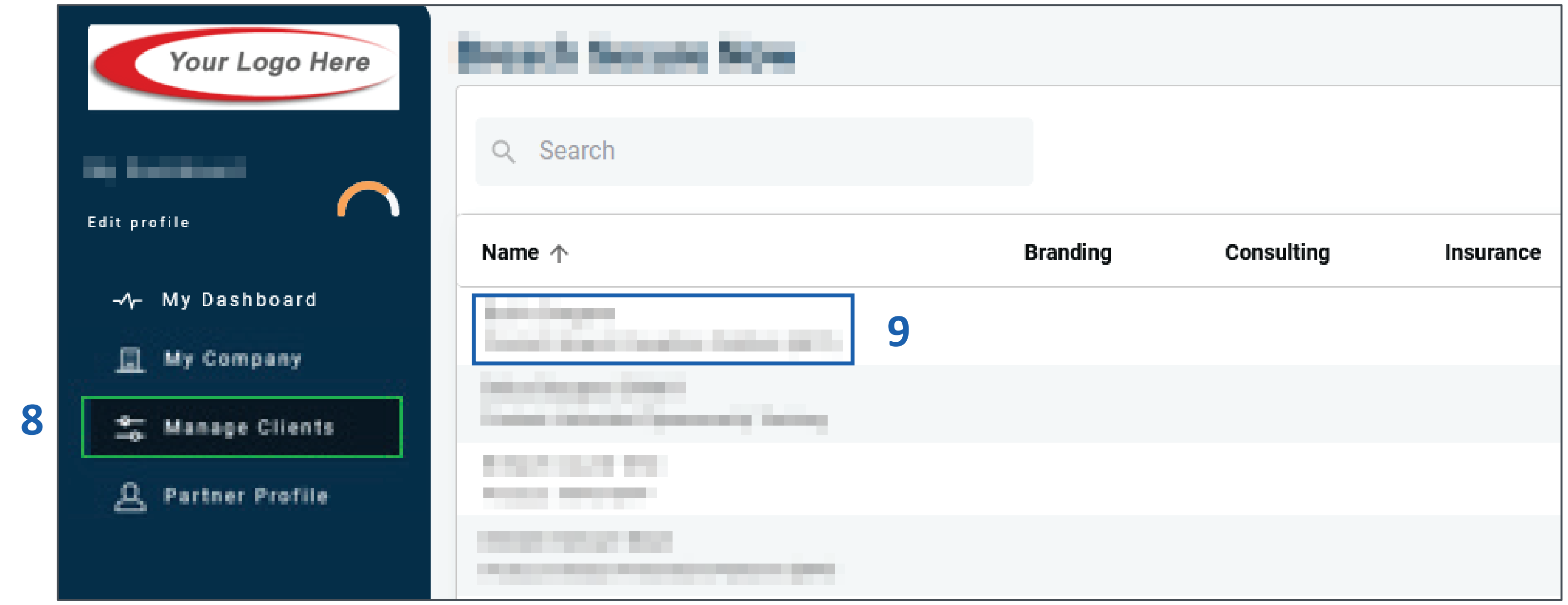
Group Description: Optional field if you would like to add details on the tag you created.

6. Assign users to the group. Note: Users must already be in one of the BSN-Employees, Managers, or PartnerAdmins groups.

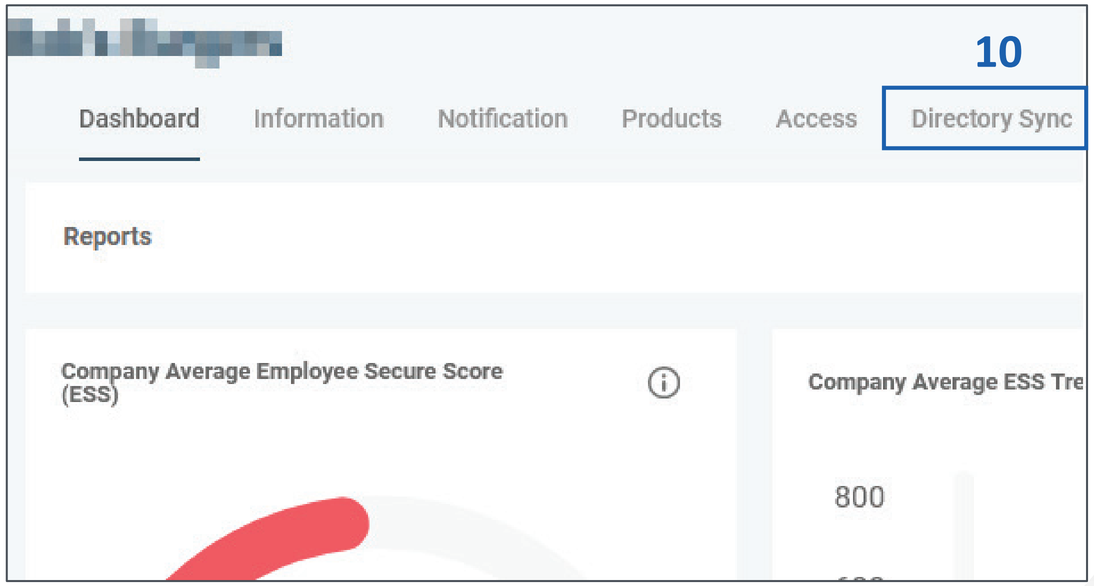
Configurations within the PII Protect Portal

Simply configure your settings inside the Active Directory application, install our home-grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

Navigating to the Directory Sync tab



7. Log in as a Partner Administrator to the PII-Protect portal [here](#).
8. Select the **"Manage Clients"** app.
9. Select the account you are setting up OnPrem AD sync on.
10. Select the **"Directory Sync"** tab.



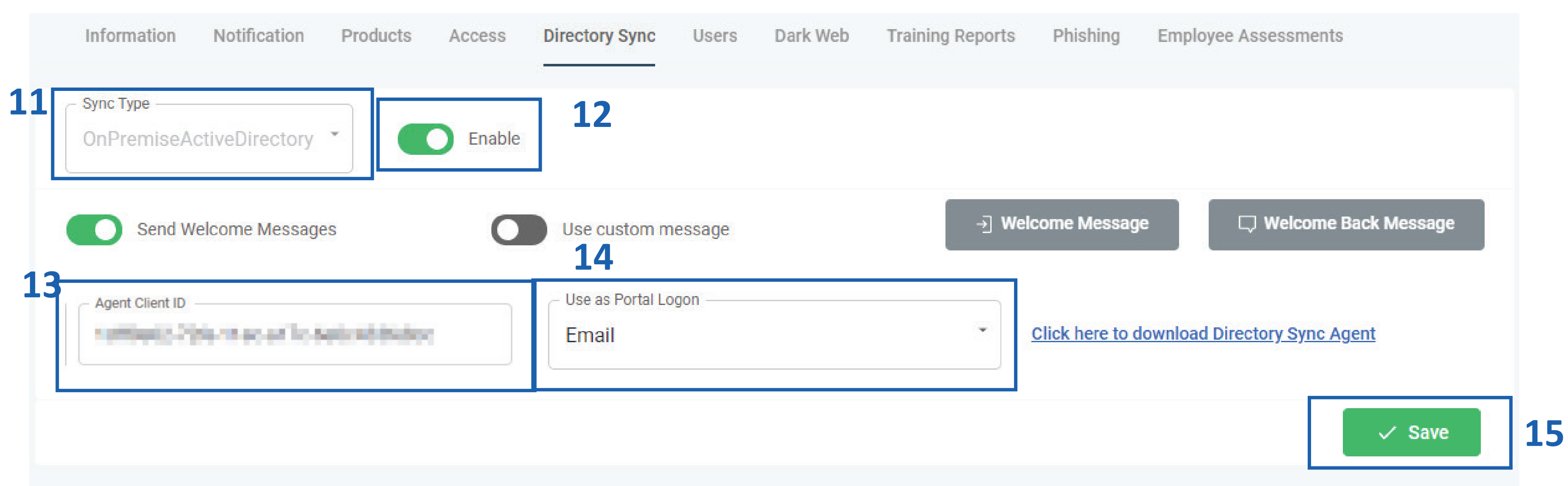
Configurations within the PII Protect Portal

Simply configure your settings inside the Active Directory application, install our home-grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

Enabling the sync

11. Under the Sync Type, select **"On Premise Active Directory"** from the Sync Type dropdown.
12. Enable the sync.
13. Copy the **"Agent Client ID"** and paste it somewhere for reference (i.e. Notepad).
14. Note your selection for **"use as portal login"** (email or UPN).
15. Select the **"Save"** button on the right.

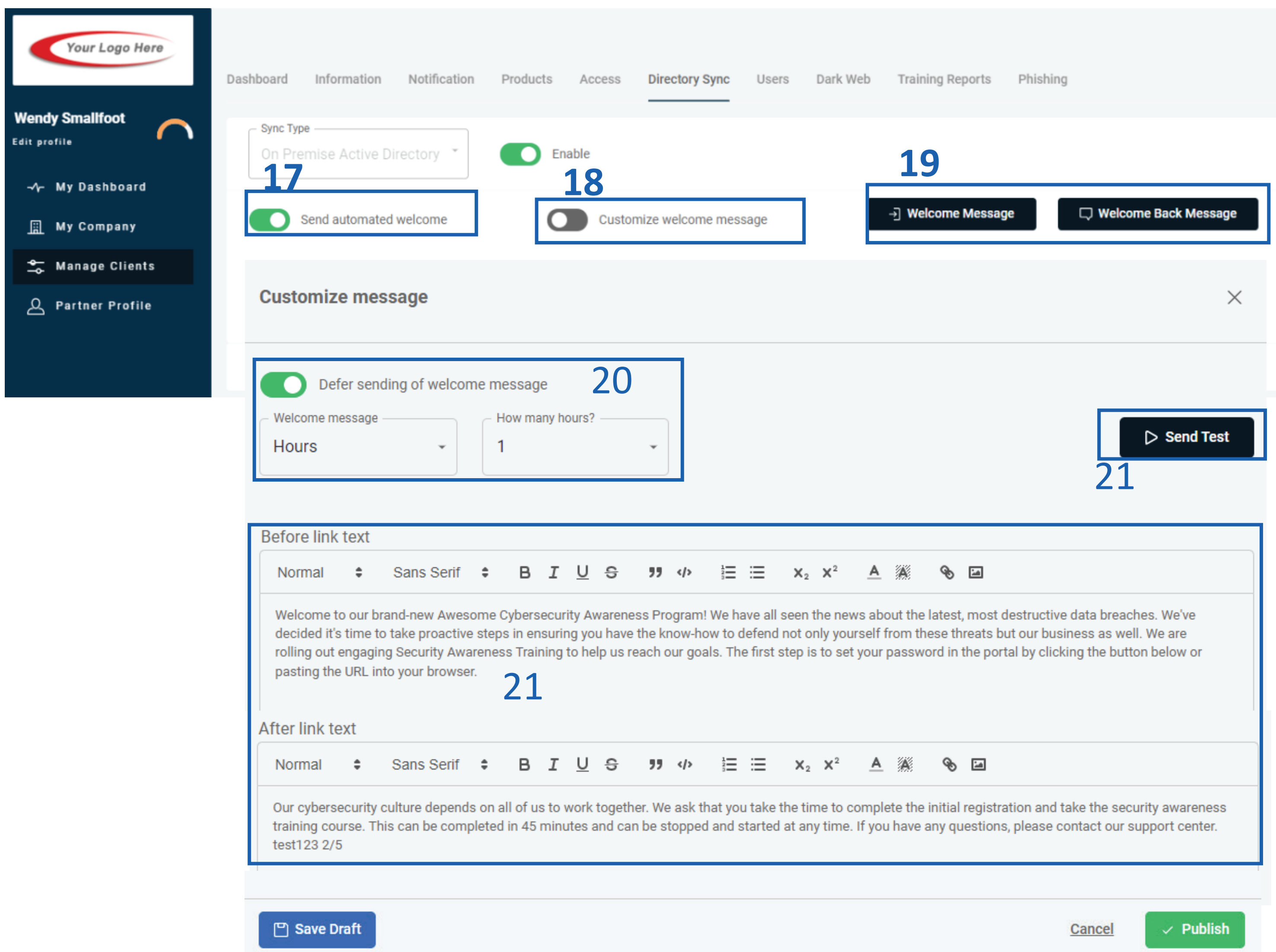
Note: If you do not save, the Client ID will not be held, which prevents the OnPrem agent from connecting.



Configurations within the PII Protect Portal

Simply configure your settings inside the Active Directory application, install our home-grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

Configuring Messaging & Notification – On-Premise AD Sync Settings Page



Welcome Message: Email sent to new users added to the platform
Welcome Back Message: Email sent to reactivated users

16. Before downloading the agent, consider configuring how Welcome messages are sent to users during the sync.
17. "**Send automated welcome**" will send the welcome message to newly added employees during the sync.
18. "**Customize welcome message**" will enable welcome messages to be customized. Without this option checked, the standard messages will be sent based off the Global Messages in the Partner Profile.
19. Clicking "**Welcome Message**" or "**Welcome Back Message**" will allow you to adjust the message.
20. Messages can be deferred for a period of hours or days.
21. The text within the message can be adjusted and a test message can be sent to preview.

Downloading the On-Premise Directory Sync Agent

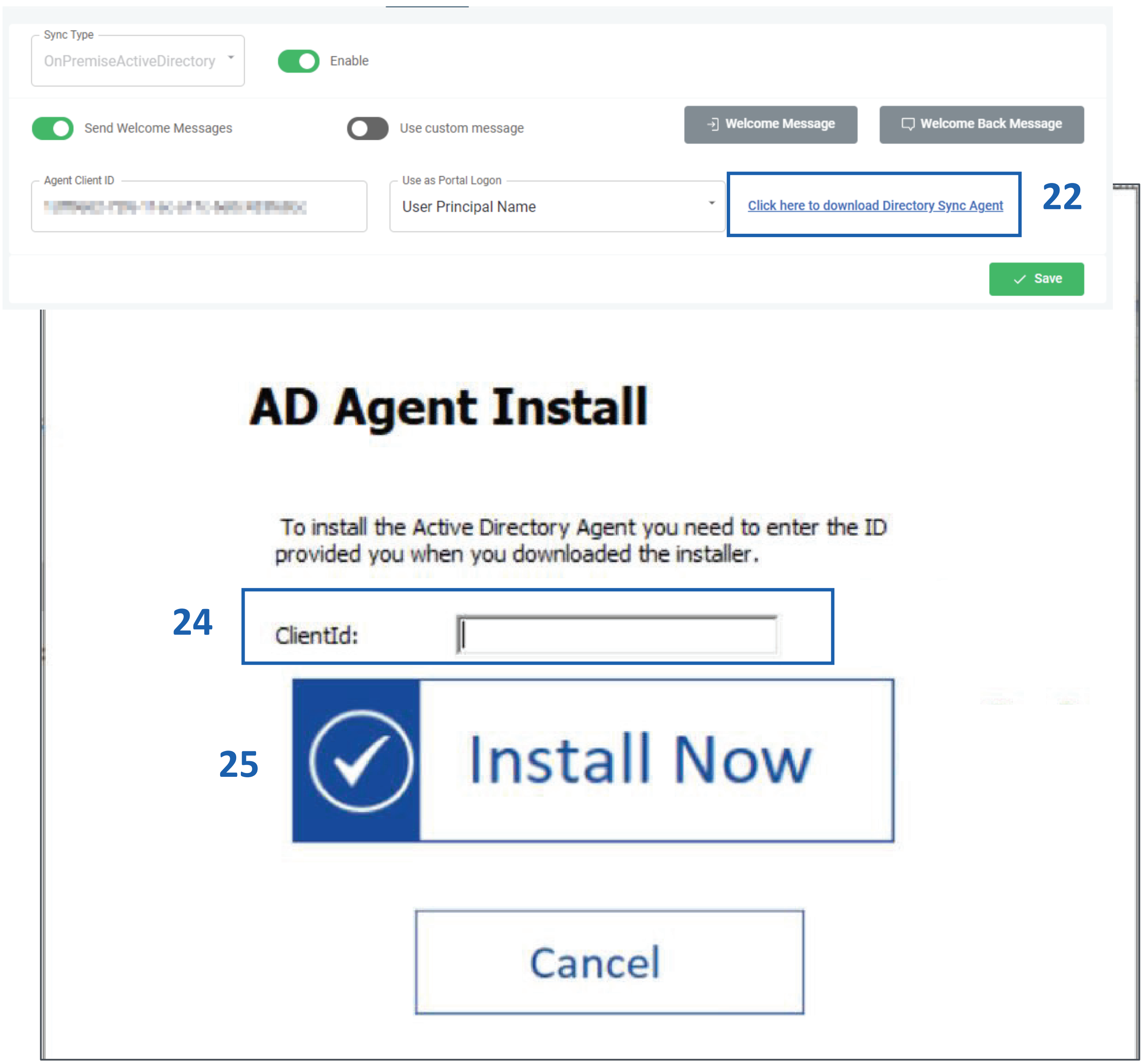
Simply configure your settings inside the Active Directory application, install our home-grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

Downloading and installing

22. Click the link "**Click here to download Directory Sync Agent**" to download the OnPrem AD sync installation file.
23. Run the installation file.
24. Paste the Client ID into the AD agent install window.
25. Select **"Install Now"**

Note: OnPrem Agent can only be installed on Windows Server 2016 or higher.

Note: When adding a new user to the groups:
   a. Make sure the email field is filled out for users under properties (automatically applied if connected to exchange server.)
   b. Add to a BSN security group.



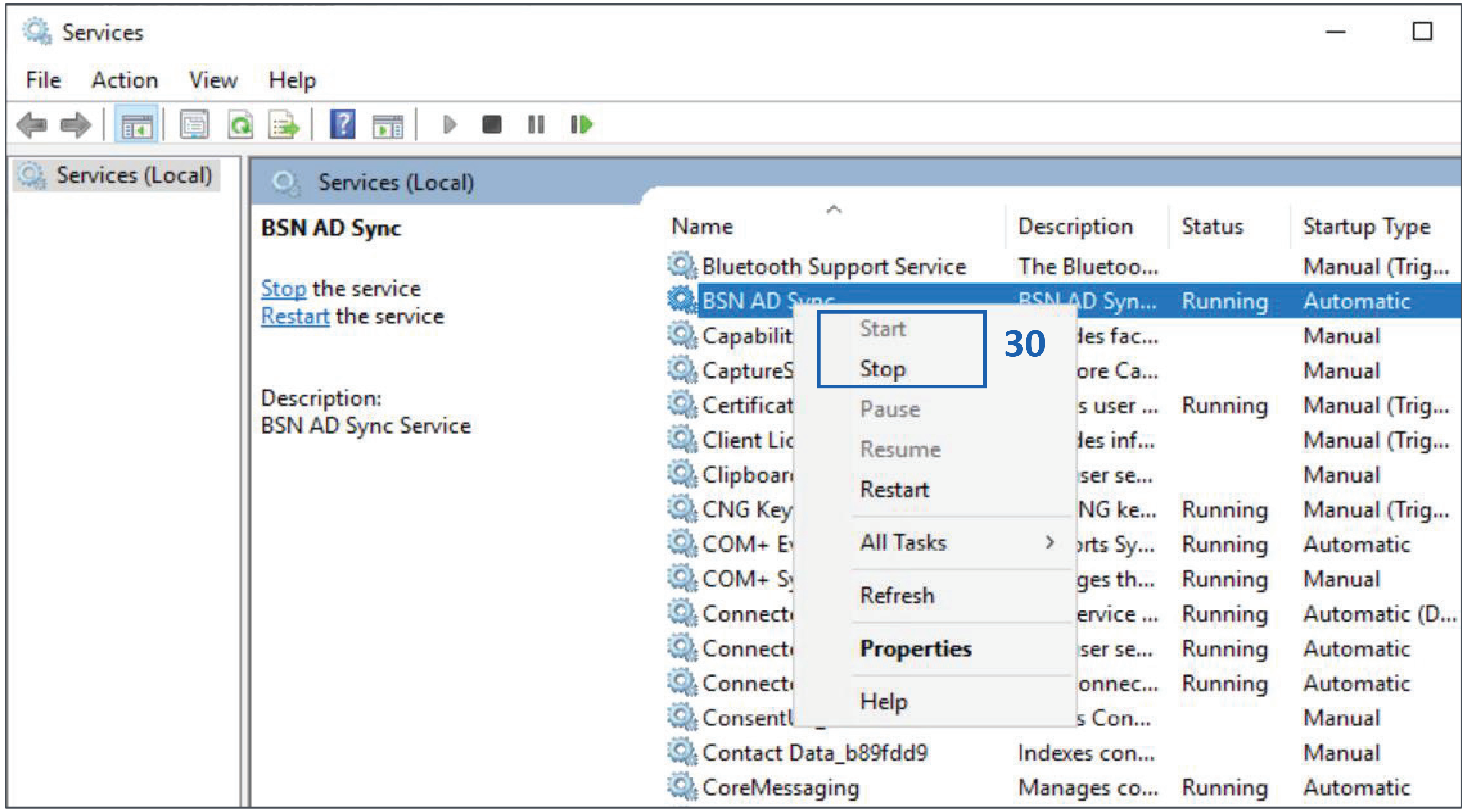
Downloading the On-Premise Directory Sync Agent

Simply configure your settings inside the Active Directory application, install our home-grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

Forced Sync

Congratulations! Your client's Active Directory is now syncing with the PII/PHI Protect Portal!

Note: The sync frequency is every 2 hours, but to sync right away, you need to start and stop the service.



26. Navigate to the **"Server Manager."**
27. Select **"Tools"** on the top right.
28. Select **"Services."**
29. Locate **"BSN ADSync"**
30. Right-click on the application and select **"Stop"** and then right-click and select **"Start."**
31. Refresh the PII-Protect portal and the user will be on the user list.

Additional Information for On-Premise Directory Sync

Simply configure your settings inside the Active Directory application, install our home-grown Active Directory Sync Agent, and setup in the Security Awareness Training portal to easily manage your user access for all your On-Premise AD clients.

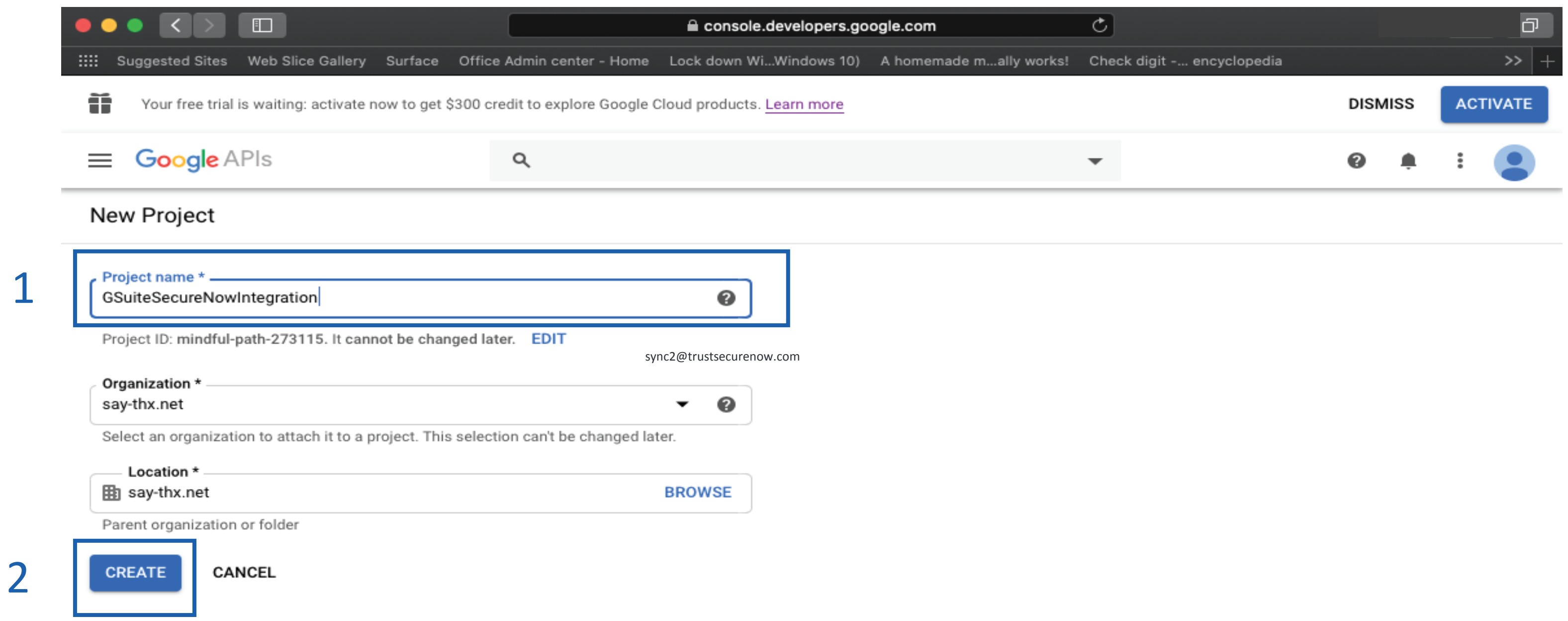
Noteworthy information

- If the user is deleted in PII-Protect, and not deleted on the agent, they will be readded.
- If the user is added in the PII-Protect portal with an email that is not on the directory, they will not be impacted and can be managed in the portal.
- If a user with the same email address is added in PII-Protect, it will link the two accounts and merge them. No duplicate will be created.
- It is recommended to preform all directory management from the agent side.

G-Suite Directory Sync Setup

Our G-Suite Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Setup in Google Console



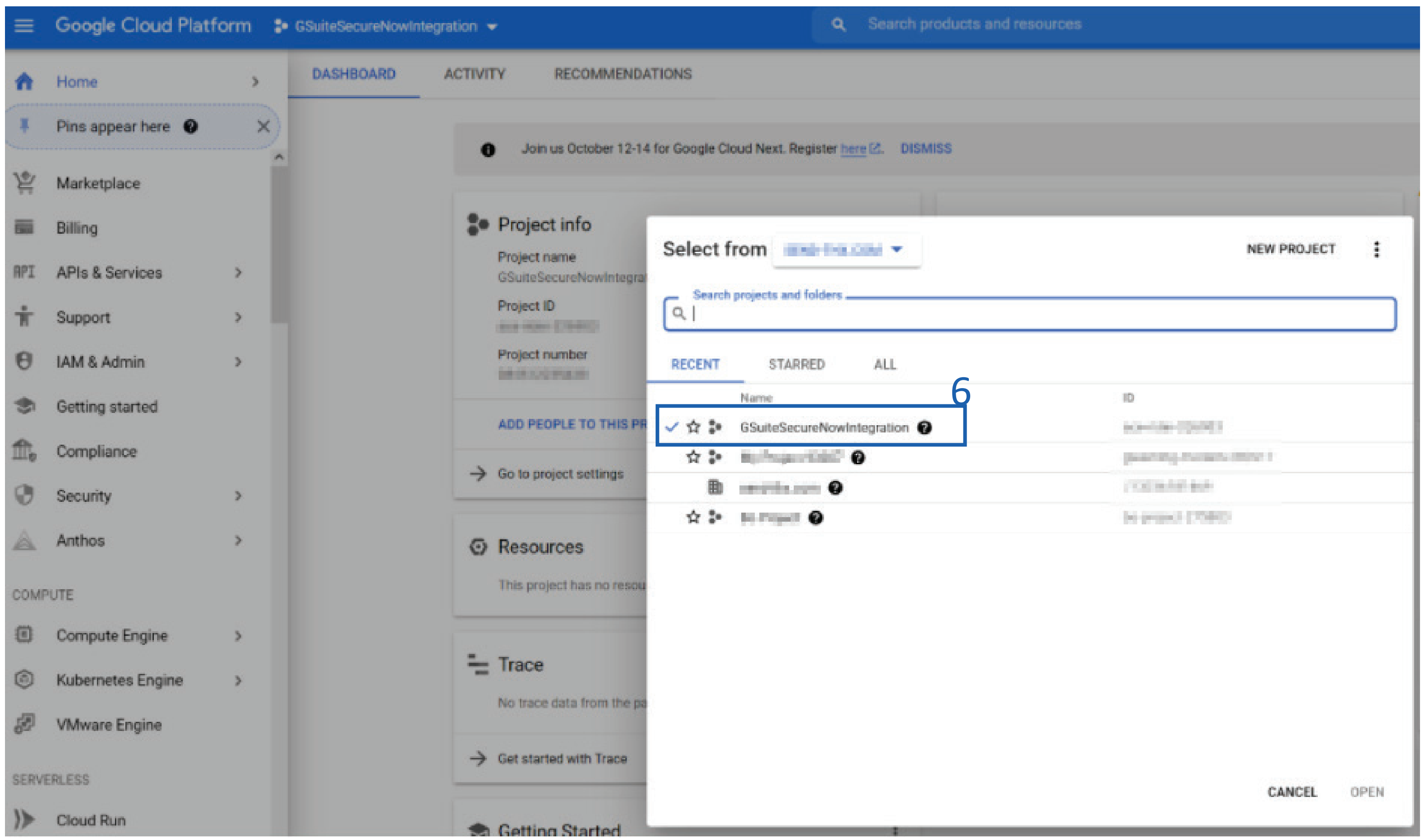
Create a new project to be used for the Security Awareness Training integration

1. Navigate to the following page: https://console.developers.google.com/projectcreate and sign into your account with your Admin credentials. If required, agree to the Terms and Services.
2. Type a unique name into the "**Project Name**" box, we suggest using: GSuiteSecureNowIntegration
3. Click the "**Create**" button to create the project.

G-Suite Directory Sync Setup

Our G-Suite Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Setup in Google Console



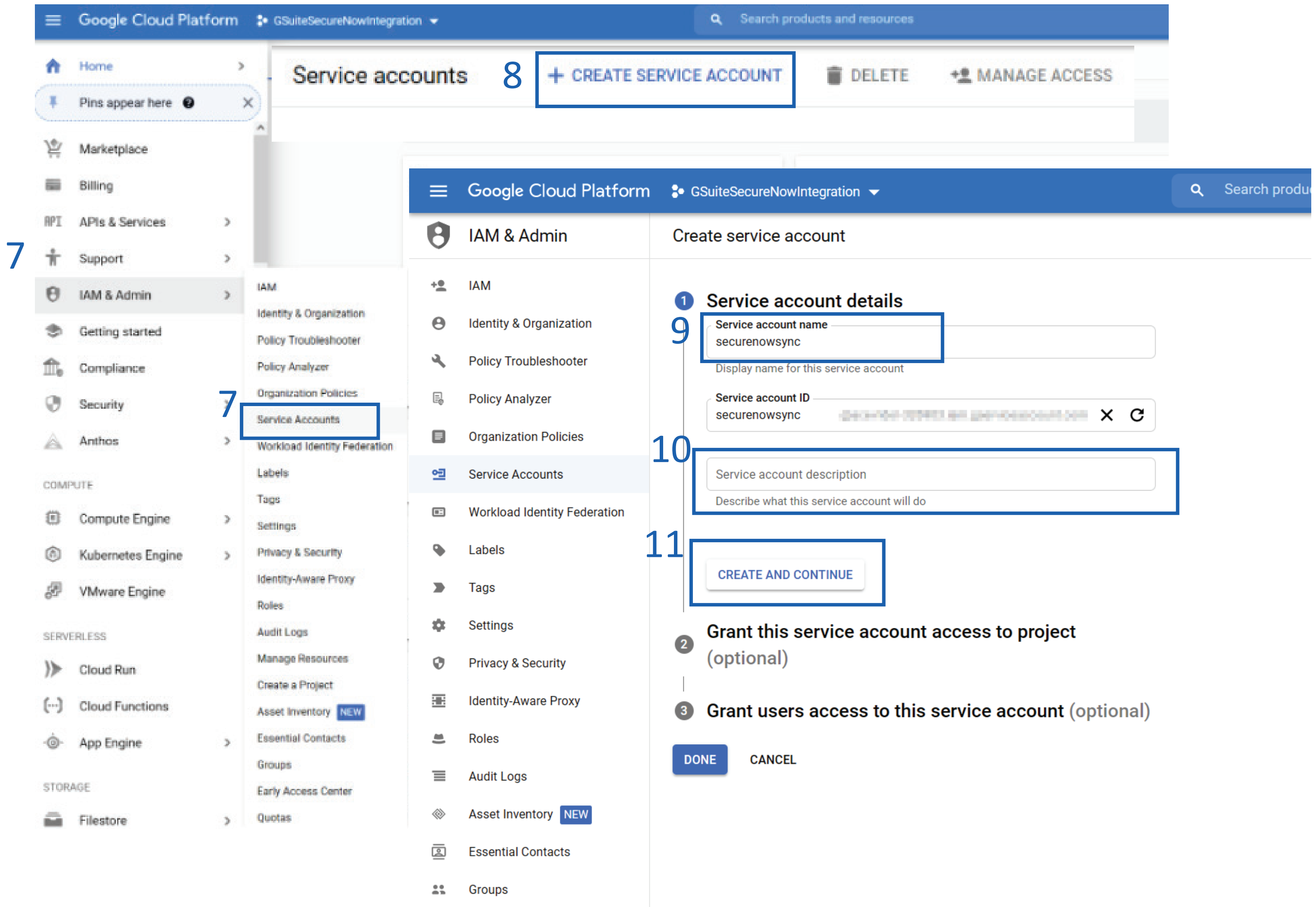
Create a service account to be used for this project

5. Navigate to the following page: https://console.cloud.google.com/projectselector2/iam-admin/serviceaccounts?supportedpurview=project
6. Select the name of the project you just created: GSuiteSecureNowIntegration

G-Suite Directory Sync Setup

Our G-Suite Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Setup in Google Console



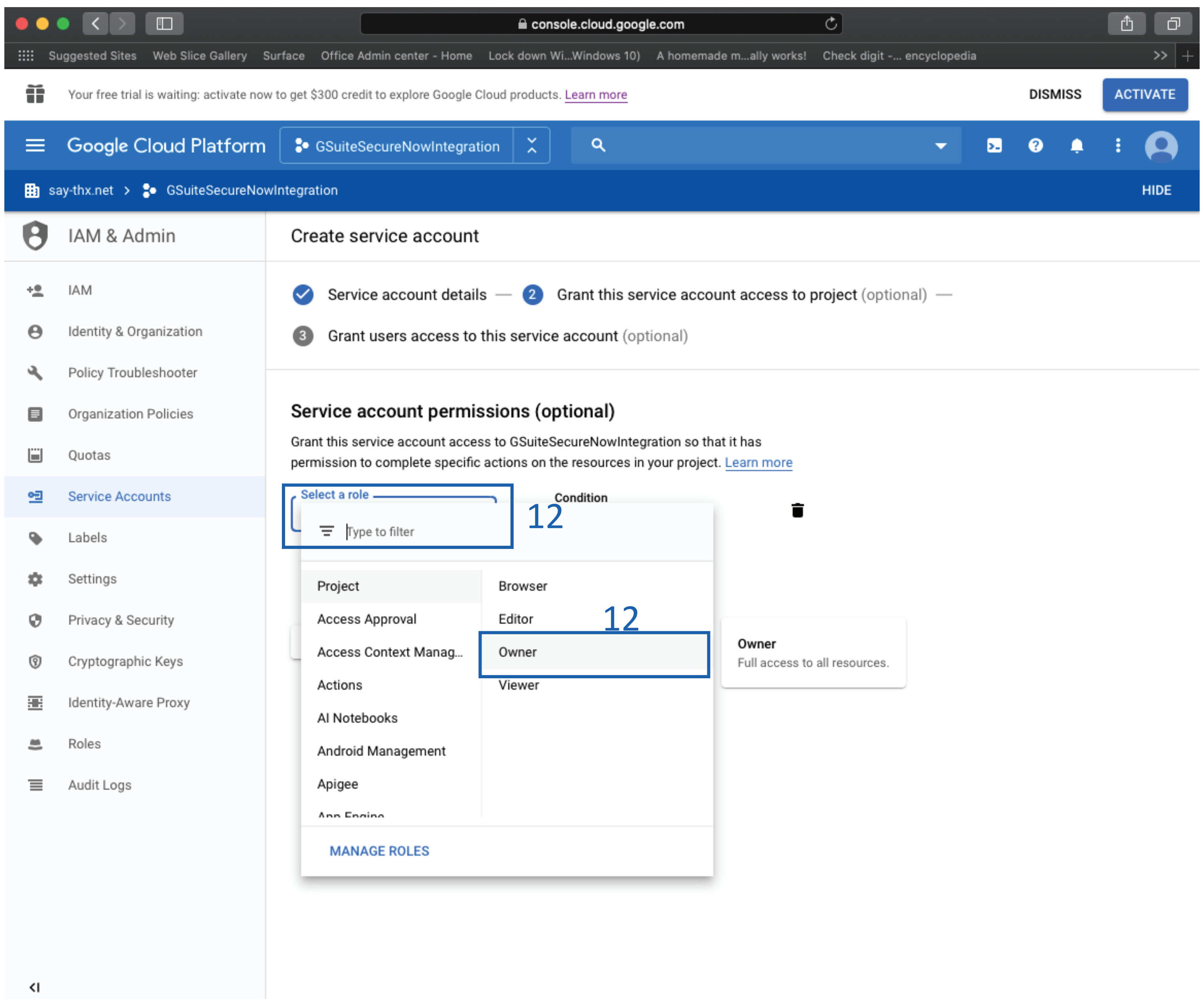
Create a service account to be used for this project

7. On the left sidebar, select "**IAM & Admin**" then select "**Service Accounts**"
8. Click the "**+ Create Service Account**" button at the top of the page.
9. Enter the Service account name: securenowsync
10. Enter an optional "**Service account description**."
11. Click the "**Create and Continue**" button.

G-Suite Directory Sync Setup

Our G-Suite Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Setup in Google Console



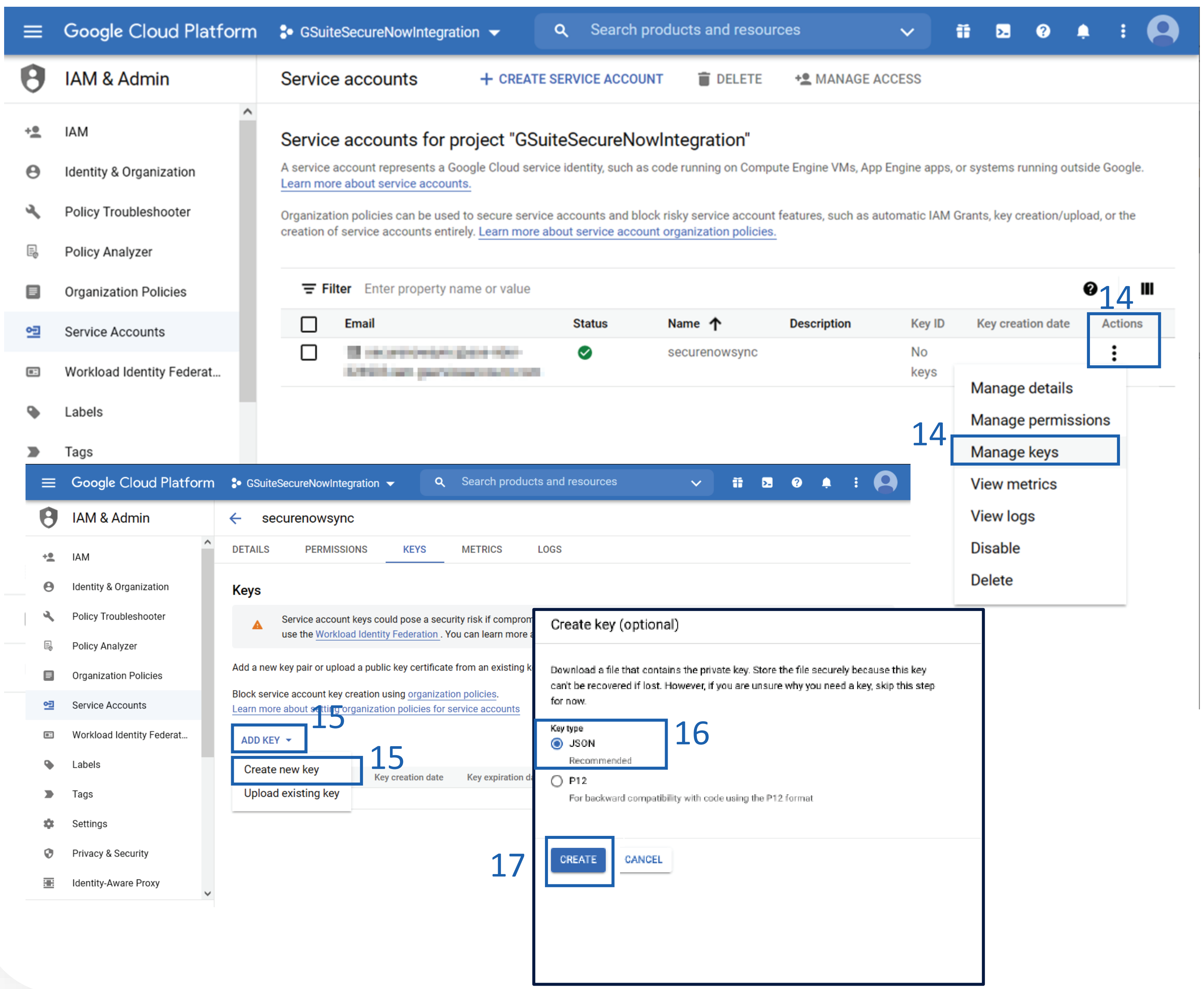
Create a service account to be used for this project

12. Click "**Select a role**" and choose "**Owner**" to grant service account access to the project owner.
13. Click "**Continue**."

G-Suite Directory Sync Setup

Our G-Suite Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Setup in Google Console



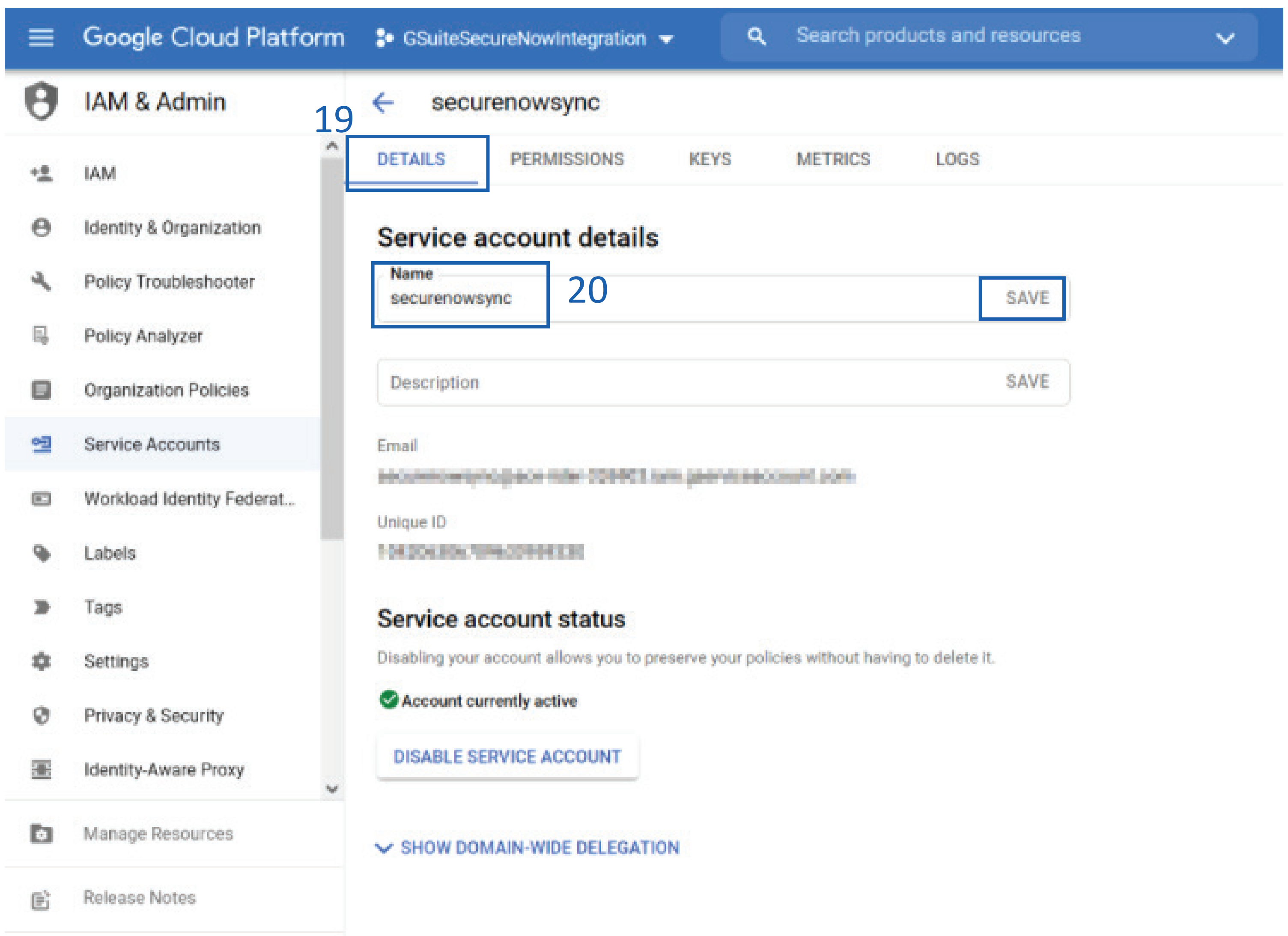
Create a service account to be used for this project

14. In the "Actions" column, click the three vertical dots, then click the "**Manage Keys**" option.
15. Click the "**Add Key**" dropdown and select "**Create new key**"
16. In the sidebar that appears, select the "**JSON**" key type.
17. Click the "**Create**" button. The JSON file will be downloaded to your local computer. Store this somewhere safe, you will need to reference this later.
18. Once the file has been downloaded and saved, click the "**Done**" button.

G-Suite Directory Sync Setup

Our G-Suite Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Setup in Google Console



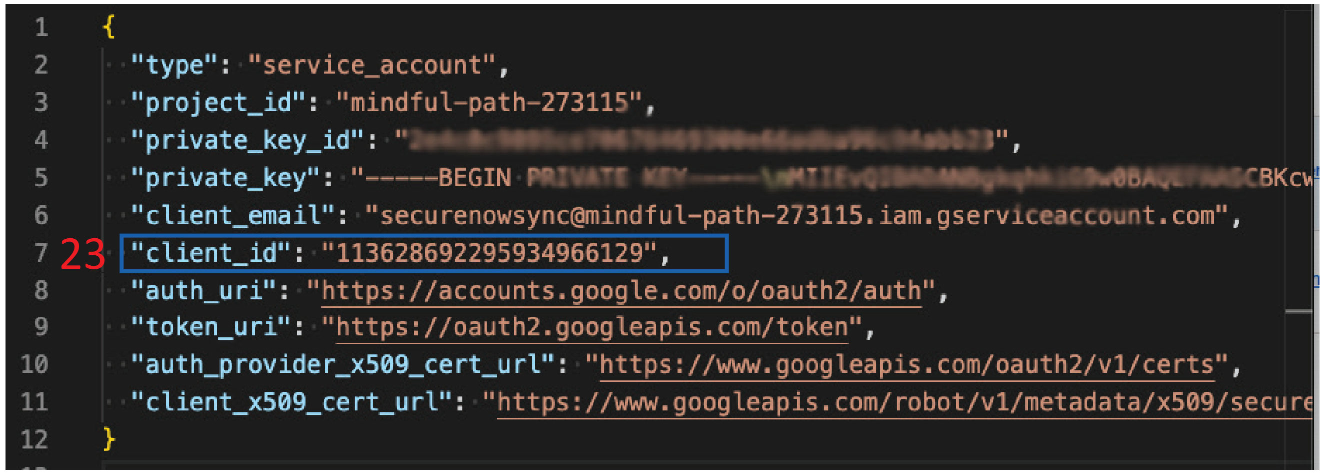
Enable G-Suite Domain-Wide Delegation

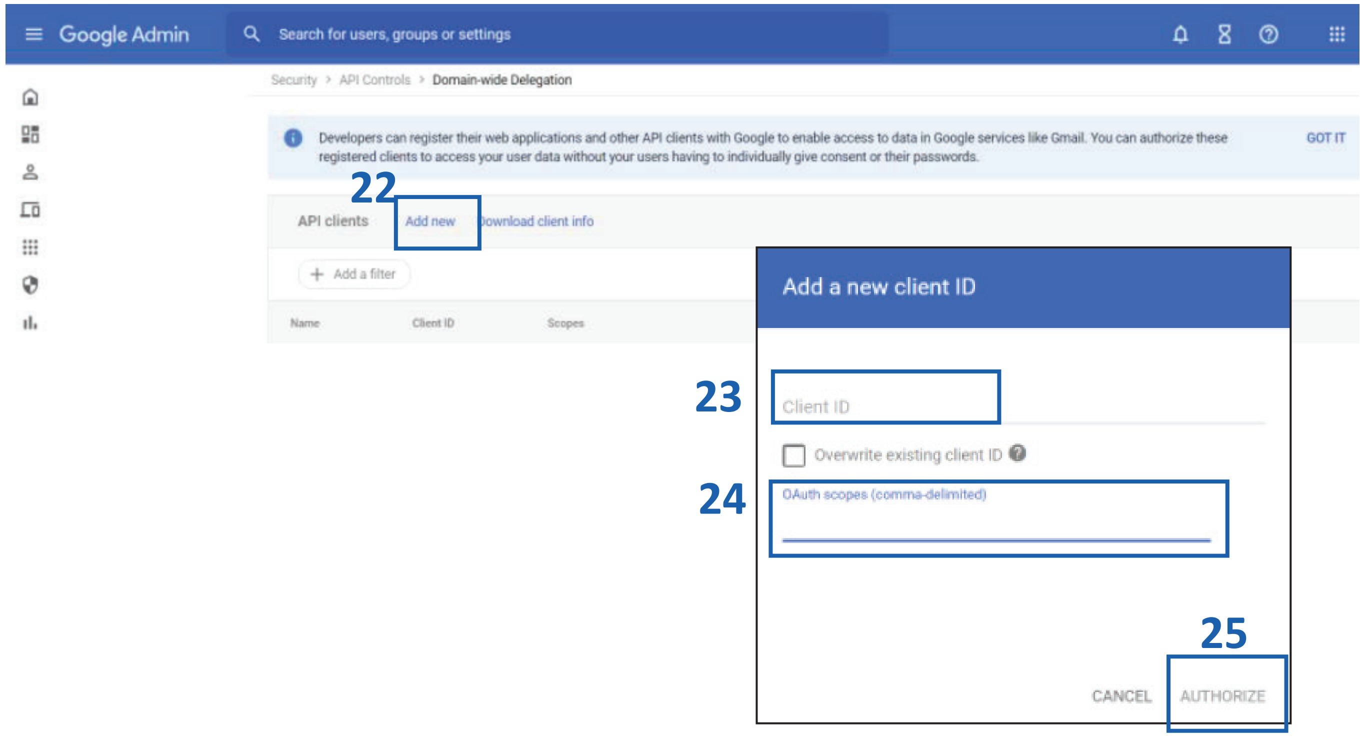
19. Click the "**Details**" section to modify your securenowsync service account.
20. Type in "securenowsync" in the "Name" field and click save

G-Suite Directory Sync Setup

Our G-Suite Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Setup in Google Console





Delegate domain-wide authority to the service account

21. Navigate to: https://admin.google.com/ac/owl/domainwidedelegation
22. Click the "**Add new**" button
23. Locate and open the JSON file downloaded in step 17 on page 39 with any file editor. Copy the "client_id" value (excluding quotation marks) and paste that value into the **Client ID** field.
24. Paste the following value into the **OAuth Scopes** field: https://www.googleapis.com/auth/admin.directory.user.readonly,https://www.googleapis.com/auth/admin.directory.group.readonly,https://www.googleapis.com/auth/admin.directory.customer.readonly
25. Click the "**Authorize**" button and the new scope will appear.

G-Suite Directory Sync Setup

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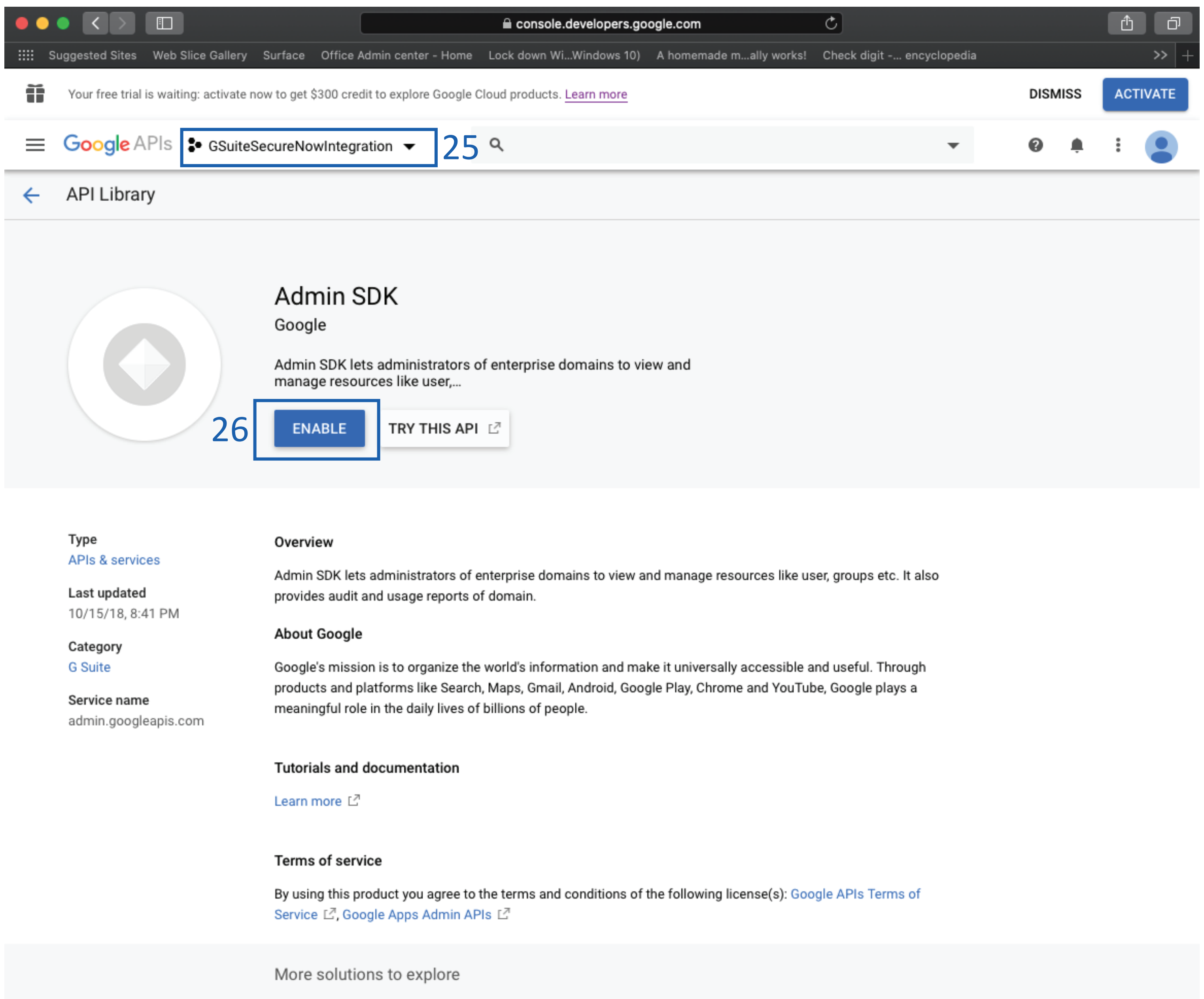
Setup in Google Console



Enable Admin API for the project

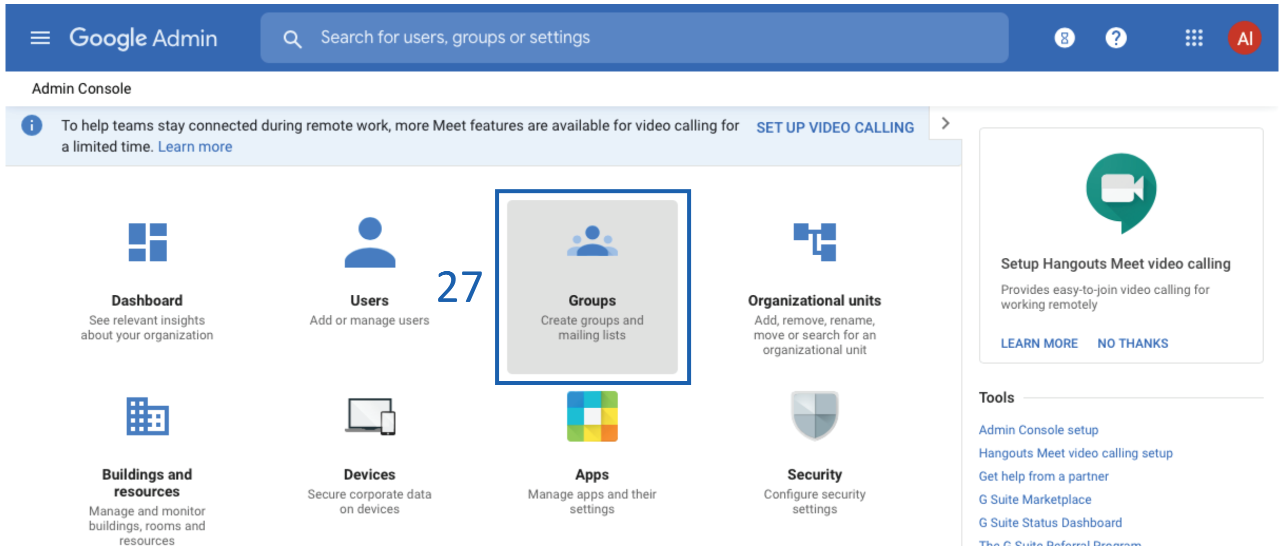
24. Navigate to: https://console.developers.google.com/apis/library/admin.googleapis.com
25. Confirm the GSuiteSecureNowIntegration project is selected next to the Google API logo. Click the dropdown and select this project if it is not shown by default.
26. Click "**Enable**" button.

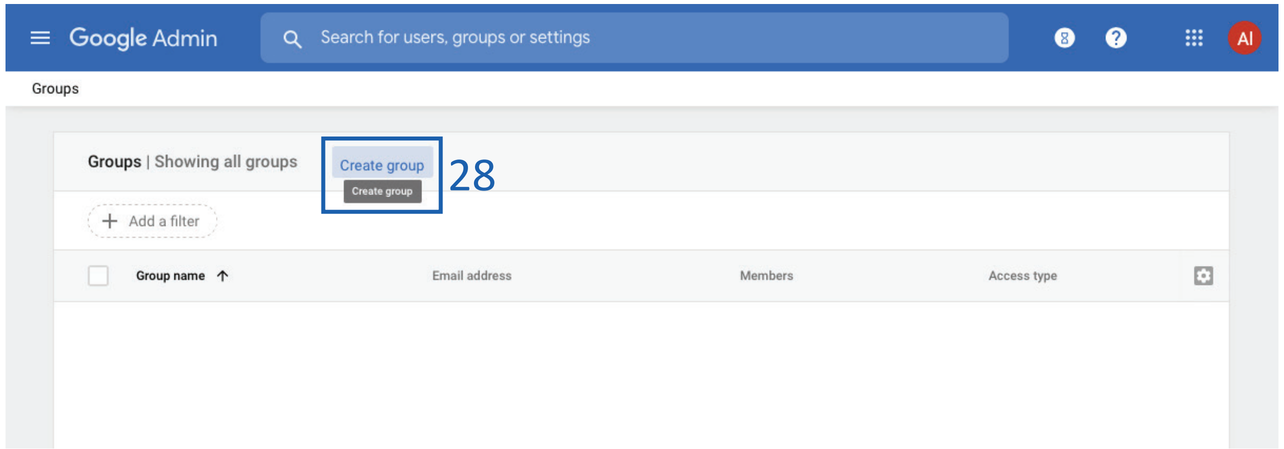
That's it! Your G-Suite Project is setup! Continue to the next page to setup Groups inside the Google Console.

G-Suite Directory Sync Setup

Our G-Suite Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Creation of User Groups in Google Console





Create groups for designating the level of access inside the portal. The possible access levels are listed from lowest to highest and contain all features of the lower access levels:

- BSN-Employees – basic employee access
- BSN-Managers – access to reporting within a client
- BSN-ManagerAdmins – access to manage phishing and bulk manage users within a client
- BSN-PartnerAdmins – This user has the **highest** level of access and will have all administrative functions for all accounts within your portal. This group is to ONLY be used for your company's internal account

Follow the steps below for creating all desired groups:

27. Inside the Google Admin Console, click "**Groups**" to open the Groups dashboard
28. Inside the Groups dashboard, click "**Create group**"

G-Suite Directory Sync Setup

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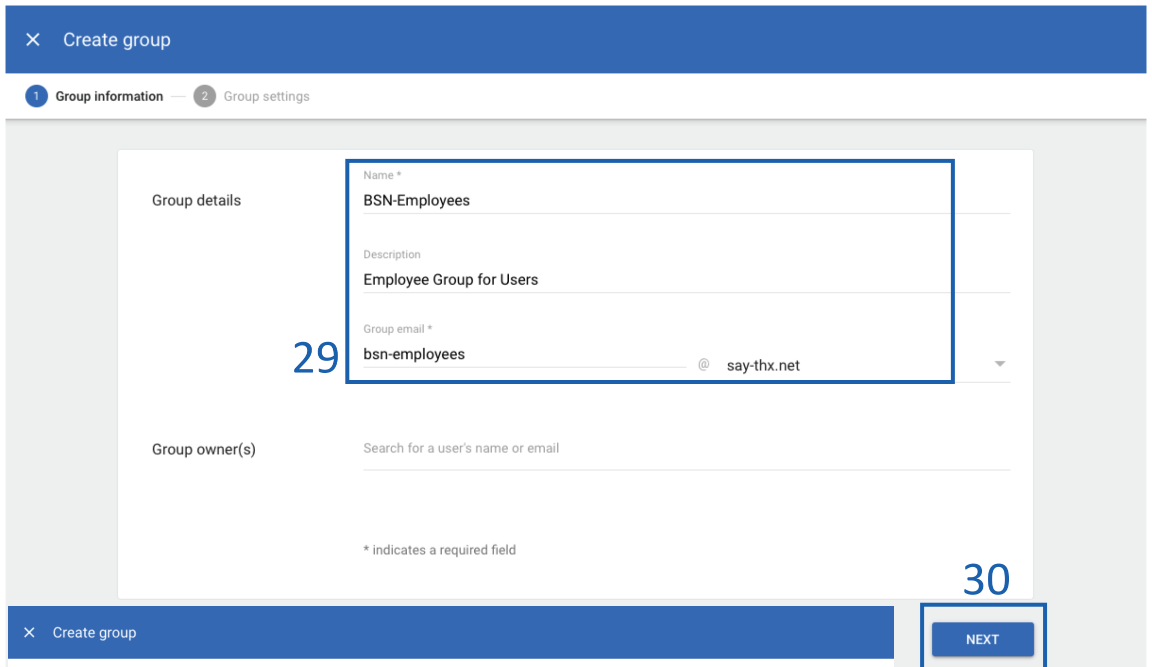

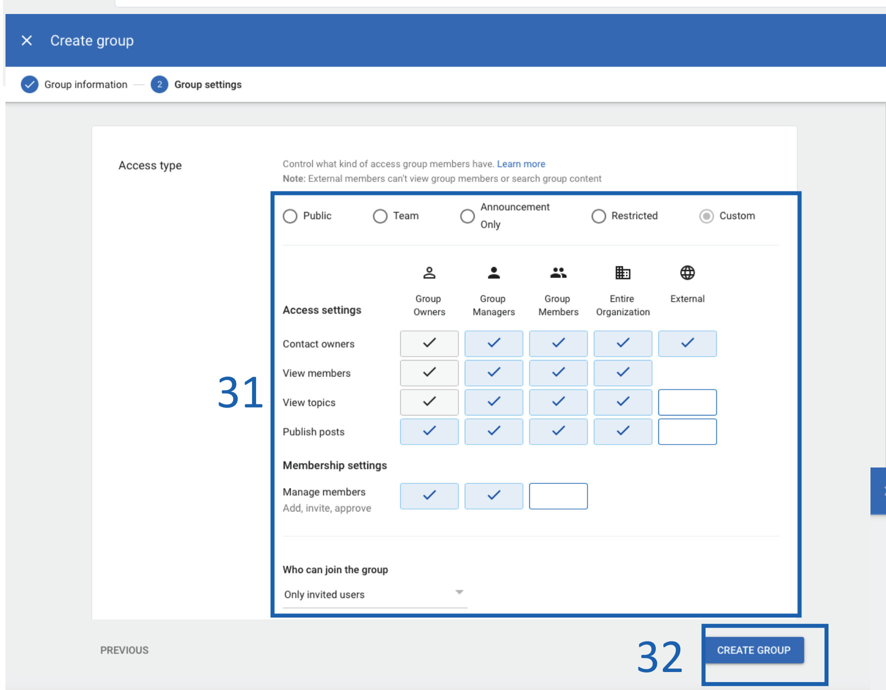

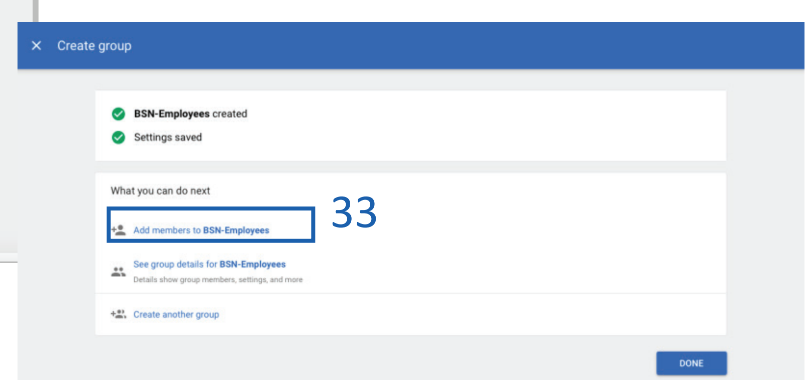

29. Provide the following "**Group Details**" for the desired group:

- Name - BSN-Employees
  - Description – Employee group for users
  - Group email – bsn-employees
- Name - BSN-Managers
  - Description – Manager group for users
  - Group email – bsn-managers
- Name – BSN-ManagerAdmins
  - Description – Manager Admin group for users
  - Group email – bsn-manageradmins
- Name – BSN-PartnerAdmins

This is to ONLY be used for your company's internal account

  - Description – Partner Admin group
  - Group email – bsn-partneradmins
- See next page for Tag descriptions (Optional)

30. Click "**Next**"
31. Setup desired access settings
32. Click "**Create Group**"
33. Click to add users to the created group

G-Suite Directory Sync Setup

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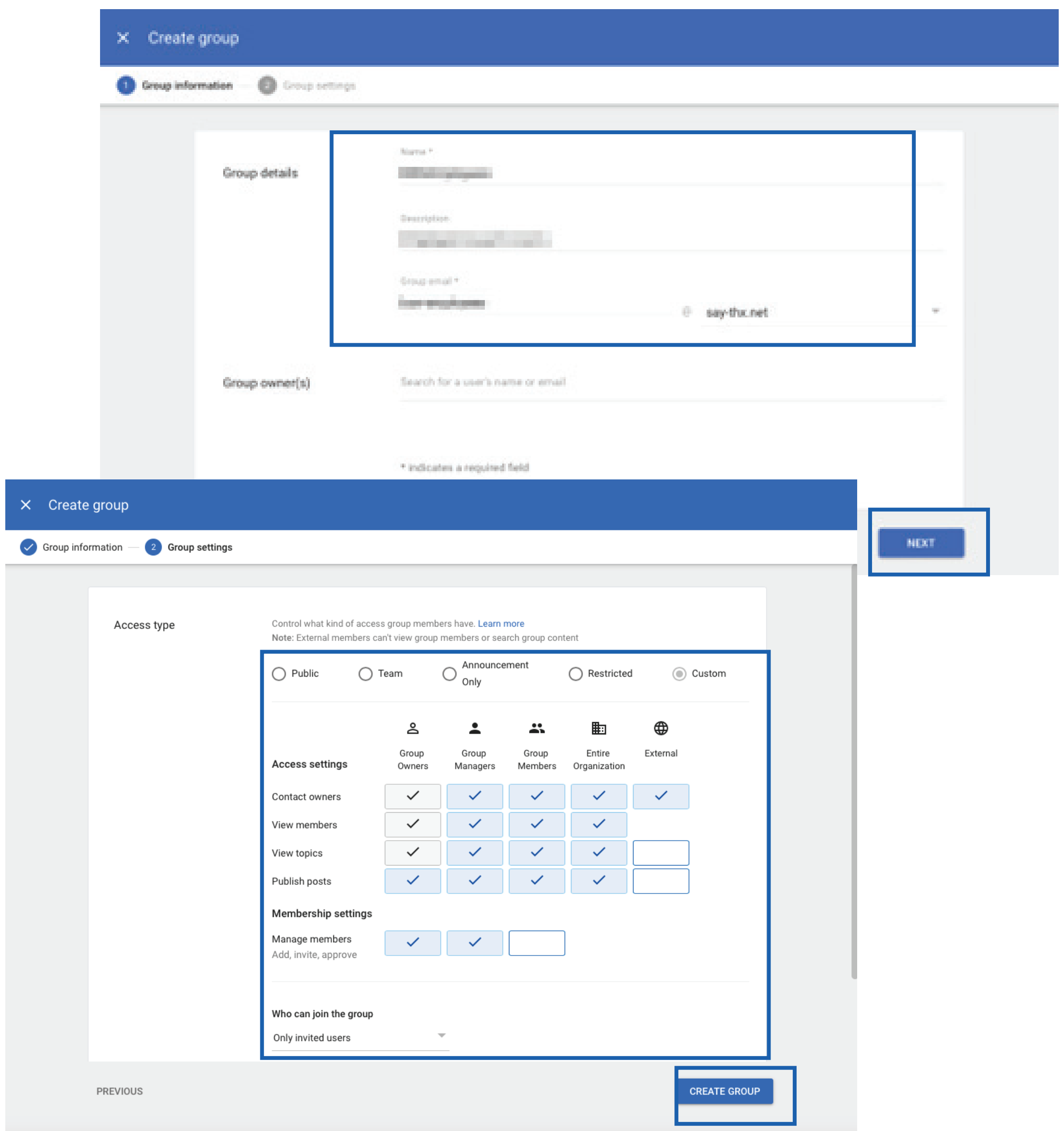
Creation of Tags Groups in Google Console - Optional



Optional: Create Tag Groups.
Tags are used for creating specific groups, typically to separate users by department, to create groups you'd like to send specific phishing emails to, or to simplify tracking in the portal.

Group Name: BSN-TAG-tagname
*tagname will be the tag you want the users associated with.
Example: BSN-TAG-Executive Team, BSN-TAG-Finance, etc.
Group Description: Optional field if you would like to add details on the tag you created.

Back in your Groups dashboard, create another group using the process on the previous page but using the Tag selections above.

G-Suite Directory Sync Setup

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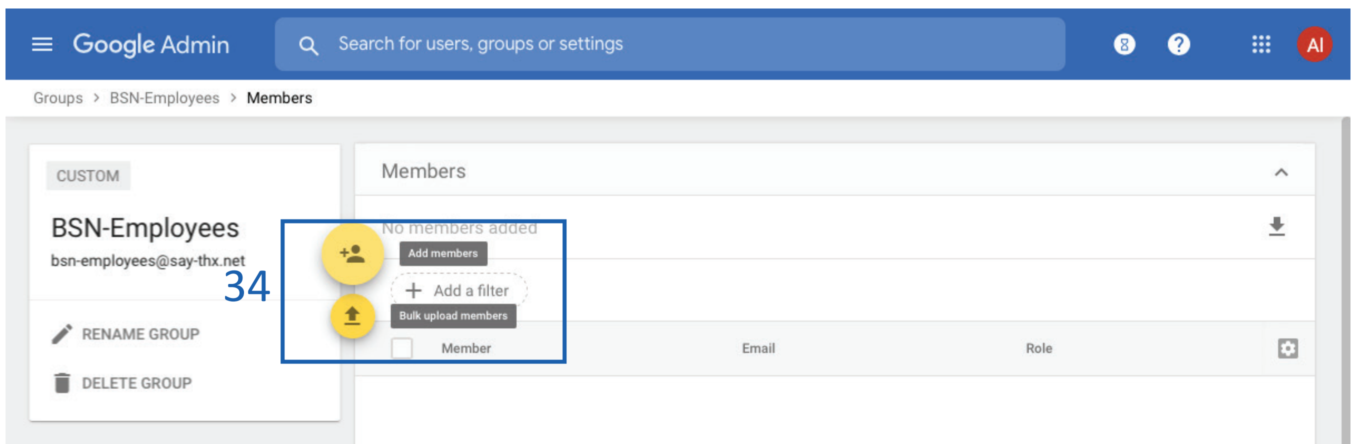
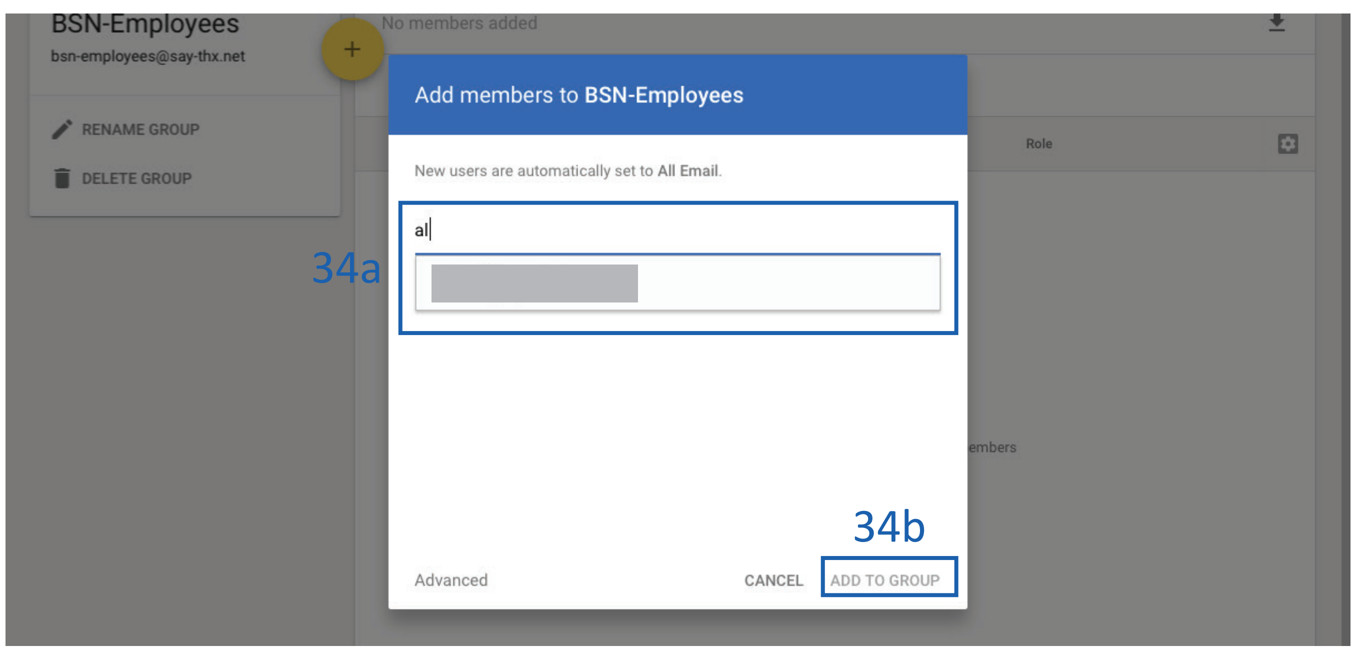
Adding Members to a Group in Google Console





Inside the Group Details dashboard:

34. Add members to the desired group:

a) Click the **add user icon** to add users one at a time:

- Begin typing the name of the user you would like to add to the group, click the user's email address, and click "Add to Group"

b) Or click the bulk upload members to import users in bulk

35. Repeat for all desired groups

Note: A user can only be in one access group. Access levels are on a hierarchy. All access levels contain the functionality as the access levels below it, simply add users to the highest level of access they should have. However, the user can be in one access group as well as one Tag group.

G-Suite Directory Sync Setup

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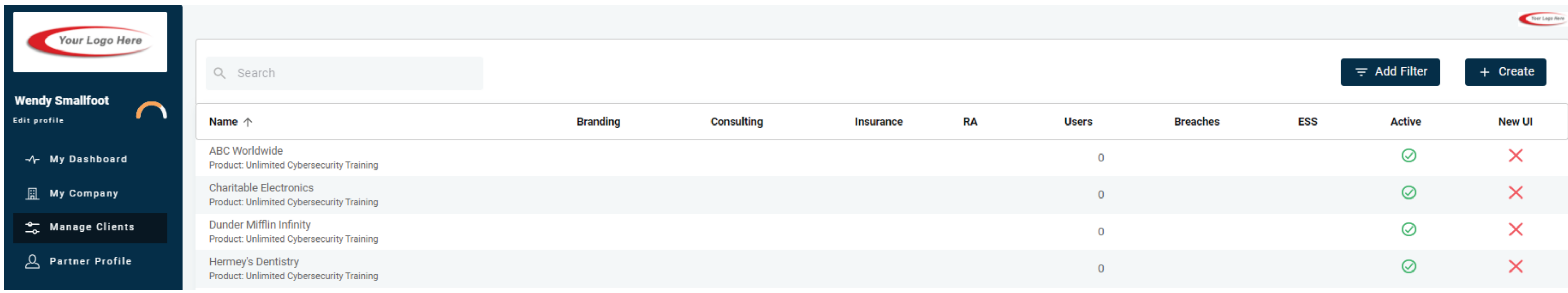
Configuration in the PII Protect Portal

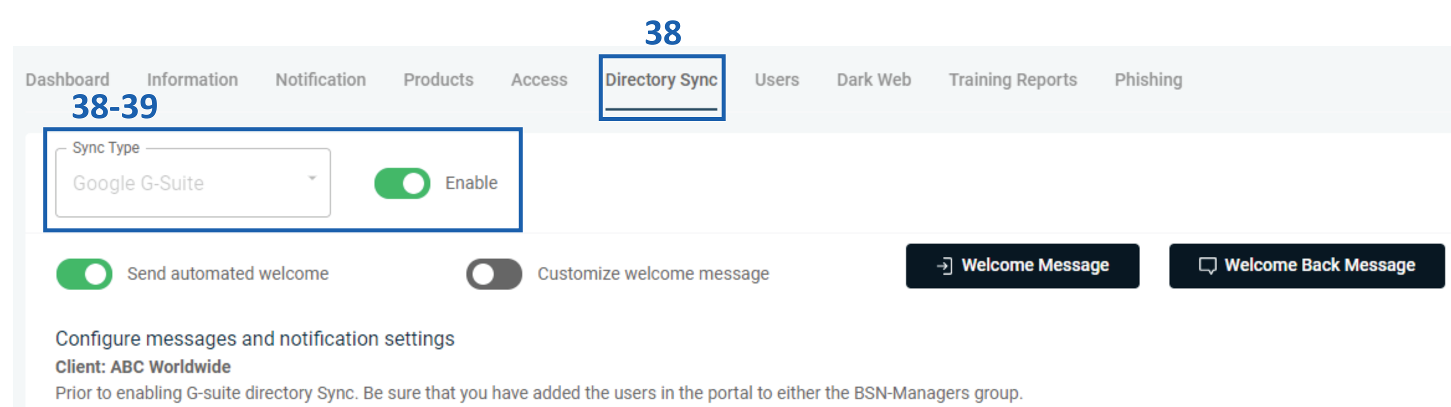


36. Login as a Partner Administrator to the PII-Protect portal [here](). Once logged in select "Manage Clients" to access your client list (above).

37. Select the client you want to sync with Google Workspace/G-Suite Sync.

38. Select the "**Directory Sync**" tab and use the Sync Type drop-down selector to select "Google G-Suite".

39. Click "**Enable**"



G-Suite Directory Sync Setup

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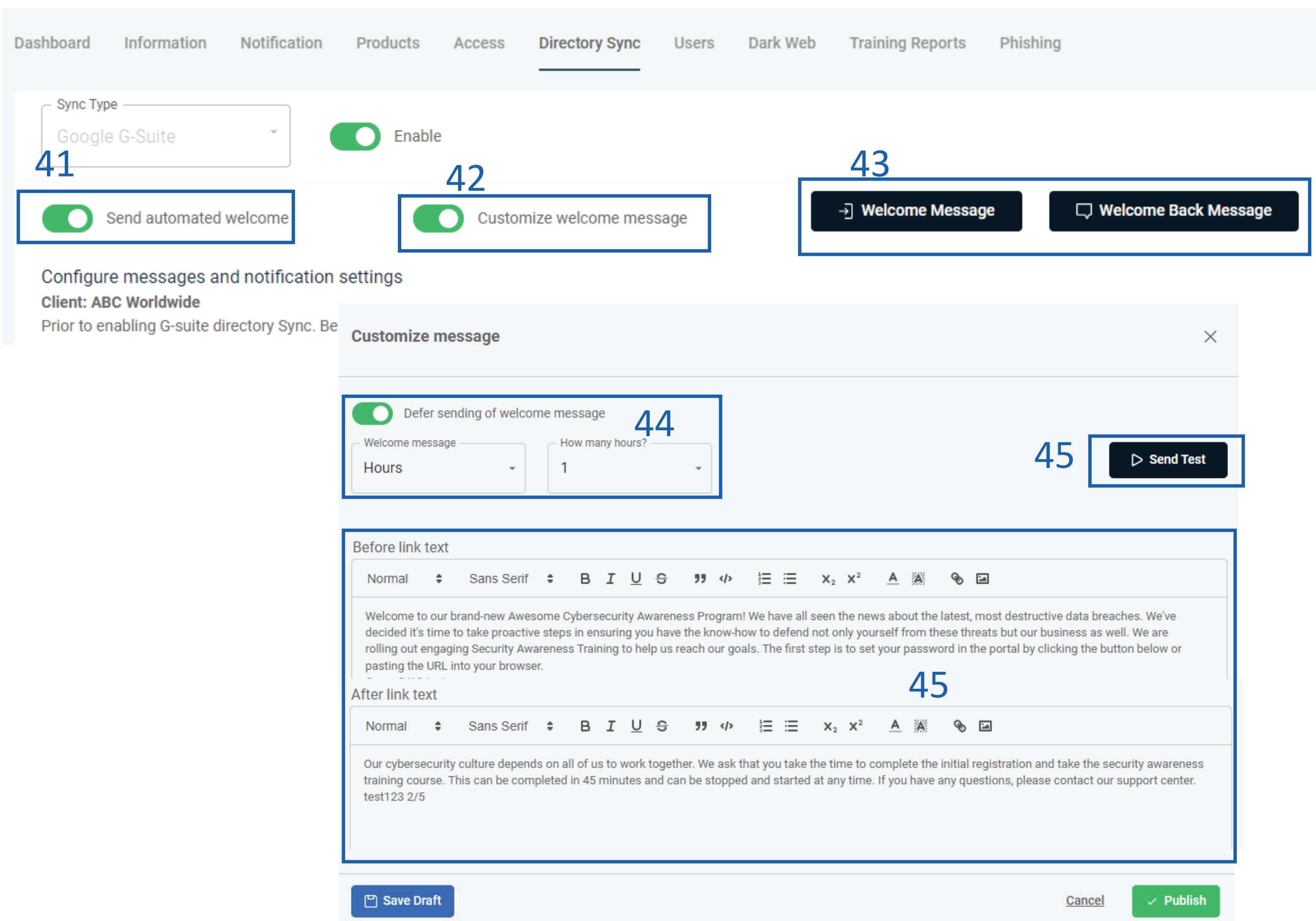
Configuring Messaging & Notification Settings – G-Suite Sync Settings Page



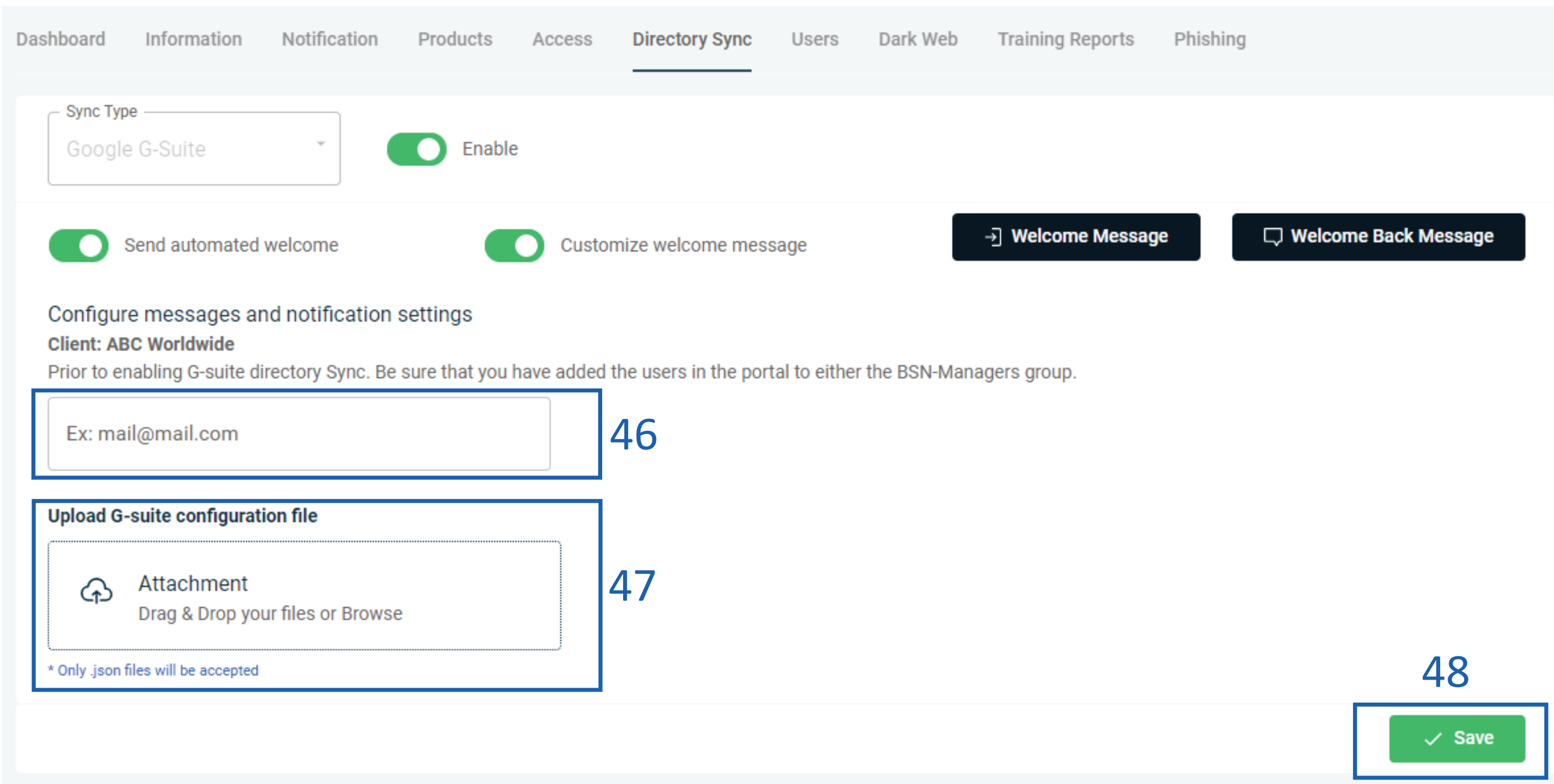
Welcome Message: Email sent to new users added to the platform
Welcome Back Message: Email sent to reactivated users

40. You can configure how these welcome messages are sent to users during the sync.
41. "**Send automated welcome**" will send the welcome message to newly added employees during the sync.
42. "**Customize welcome message**" will enable welcome messages to be customized. Without this option checked, the standard messages will be sent based off the Global Messages in the Partner Profile.
43. Clicking "**Welcome Message**" or "**Welcome Back Message**" will allow you to adjust the message.
44. Messages can be deferred for a period of hours or days.
45. The text within the message can be adjusted and a test message can be sent to preview.

G-Suite Directory Sync Setup

Our G-Suite Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Add, Modify, or Deactivate users as soon as they're in your client's system so they can get up to speed on cybersecurity, without a hitch.

Configuring Application Authentication – G-Suite Sync Settings Page



46. Input your **G-Suite Admin Email Address**

47. Click the "**Choose File**" button and select the JSON file that was downloaded on page 28.

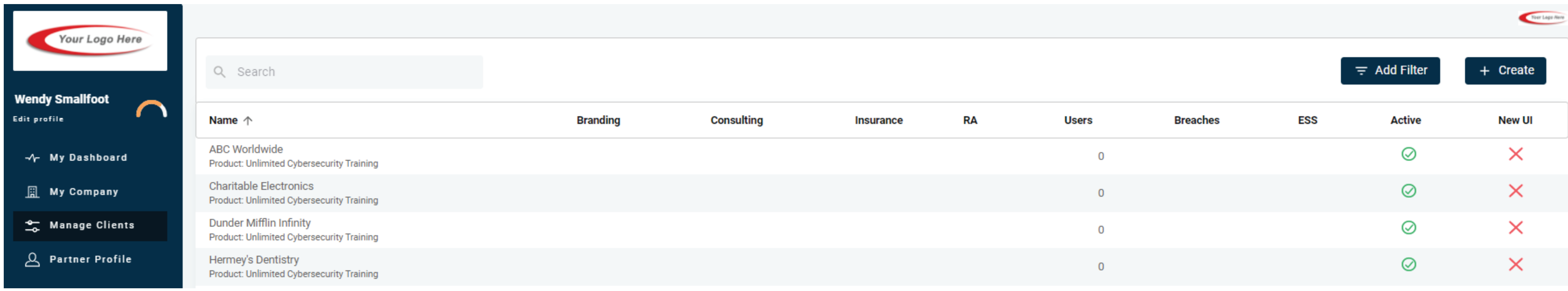
48. Click " **Save** " to save your changes and finalize G-Suite synchronization for this client! Repeat steps 1 – 50 for each client!

Important: Once G-Suite Directory is activated; you will not be able to add users to the portal outside of this method. Our portal will sync once every hour, which may cause a delay for your users to be updated.

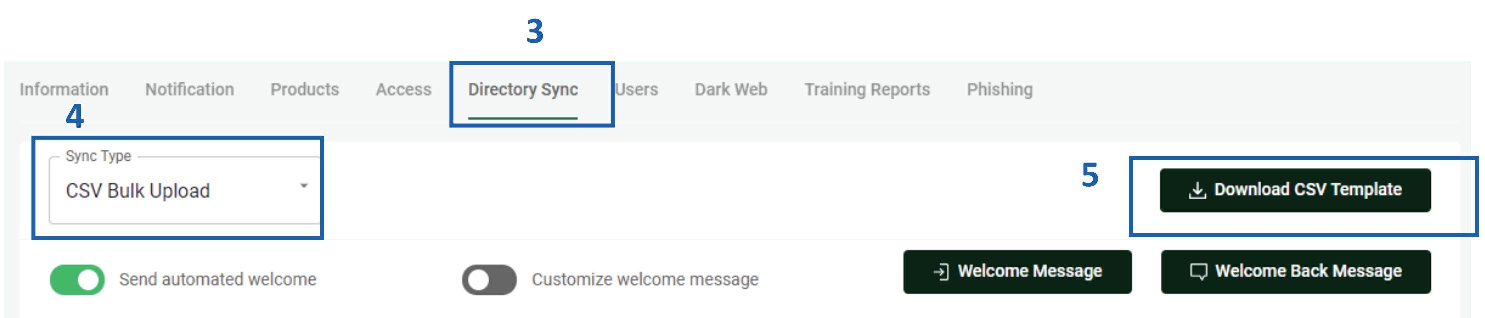
Bulk User Management via CSV

Managing users in bulk with our CSV template has never been easier. In just a few clicks, users can get onboarded into your client's PII/PHI Protect portal and start working towards cybersecurity awareness in minutes.

Configuration in the PII Protect Portal



1. Login as a Partner Administrator to the PII-Protect portal [here](). Once logged in select "Manage Clients" to access your client list (above).



2. Select the client you want to sync with Azure Active Directory.

3. Select the "**Directory Sync**" tab and use the Sync Type drop-down selector to select "Google G-Suite".

4. Click "**Download CSV Template**" to download the current list of users inside the portal you'd like to modify. If you are uploading new users to the portal, a blank template will download.

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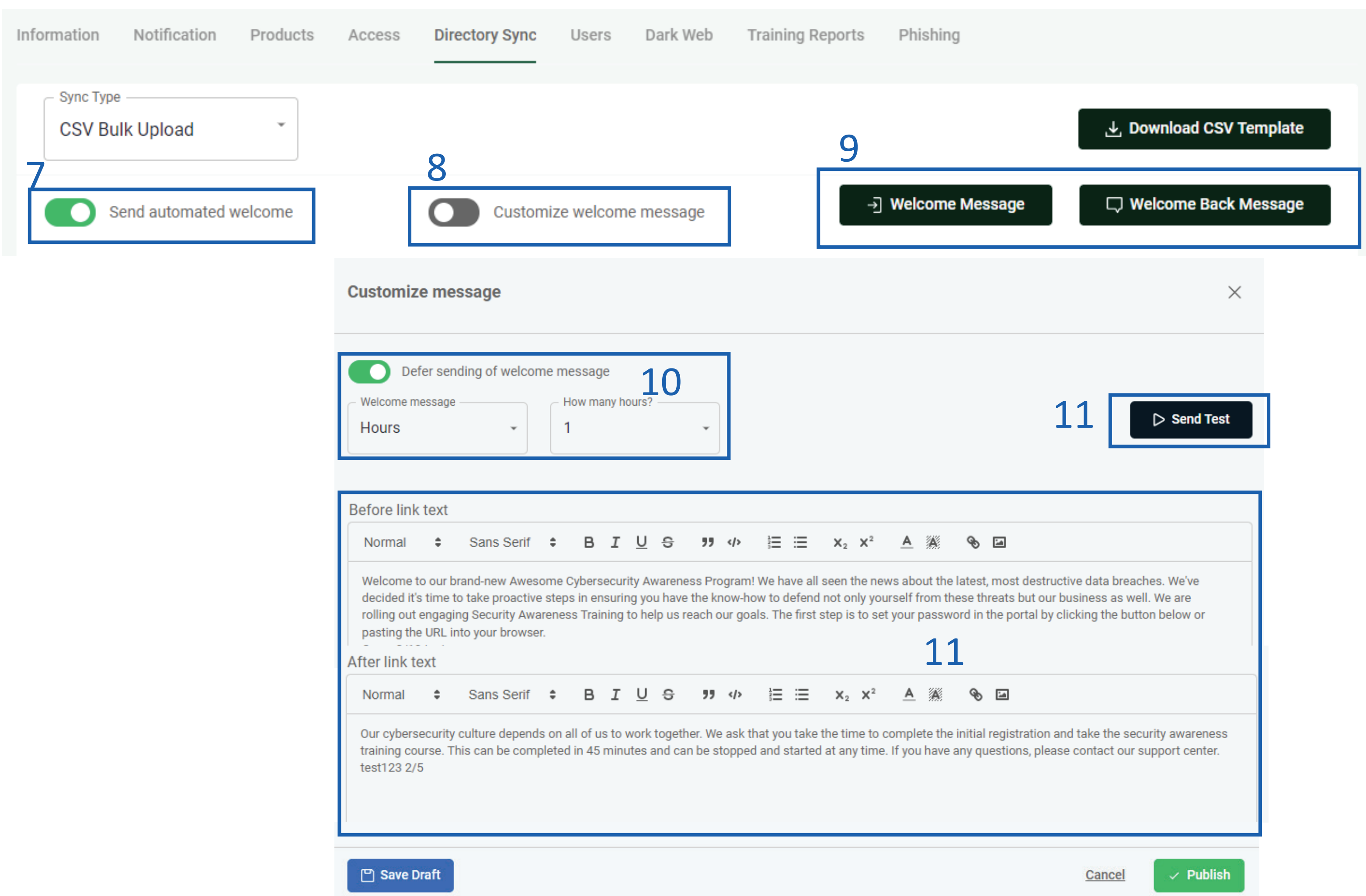
Configuring Messaging & Notification Settings – CSV Bulk Upload Settings Page



Welcome Message: Email sent to new users added to the platform
Welcome Back Message: Email sent to reactivated users

6. You can configure how these welcome messages are sent to users during the sync.
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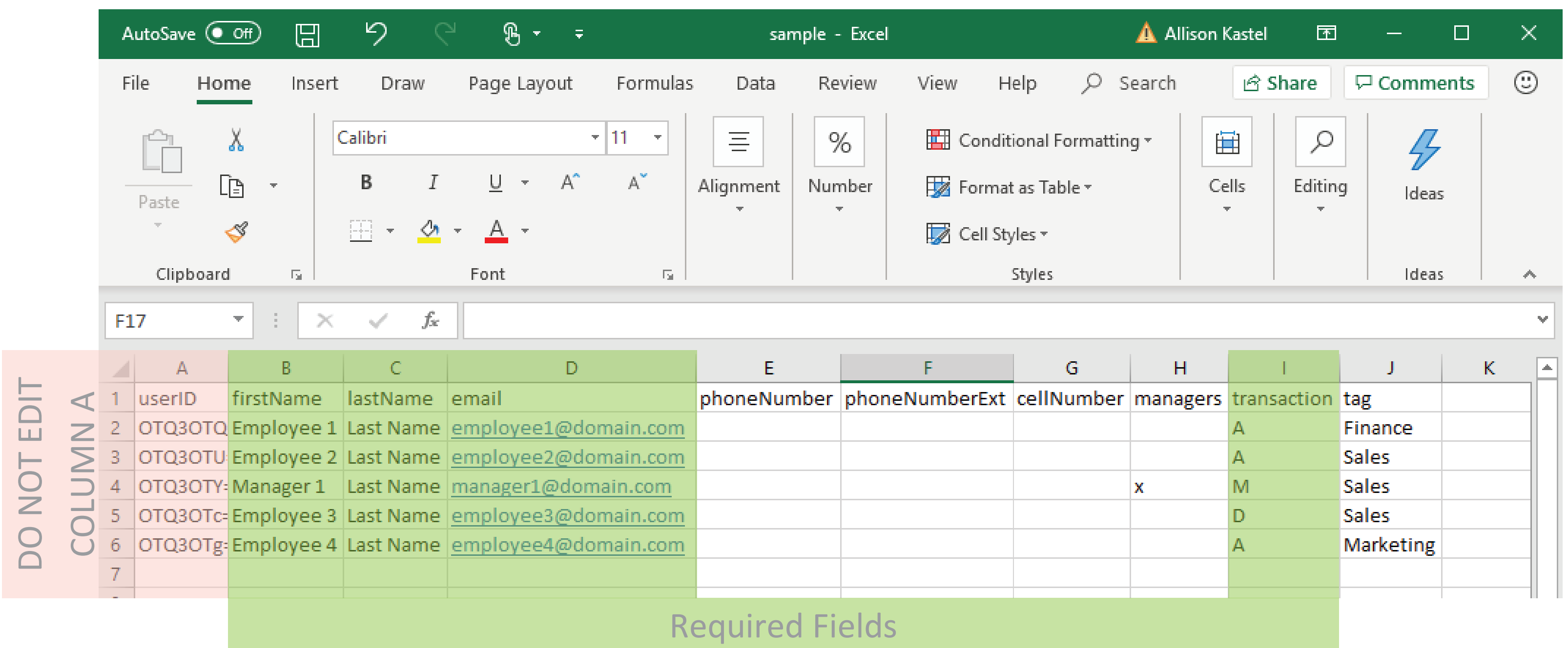
CSV Template Modification & Uploading



Transaction column key: This column prompts the system to take one of the following actions when importing your user file into the system and is used to manage access to the system. This field **MUST** be completed for each user in this file or else you will receive an error.

A - Add or reactivate user (user will be notified)

D - Deactivate user (user will *not* be notified)

M - Modify user information (default for existing users)

12. Modify the required fields as needed.

Note: Do NOT modify header names or column A or your upload will fail.

Required Fields:

- firstName
- lastName
- email
- transaction

Optional Fields:

- managers

    - Place an "X" in this column to assign manager access to this user. Leave this column blank for employees.

- phoneNumber & phoneNumberExt
- Tag

    - Use tags to send filtered phishing emails and have access to more detailed reporting based on department.

Bulk User Management via CSV

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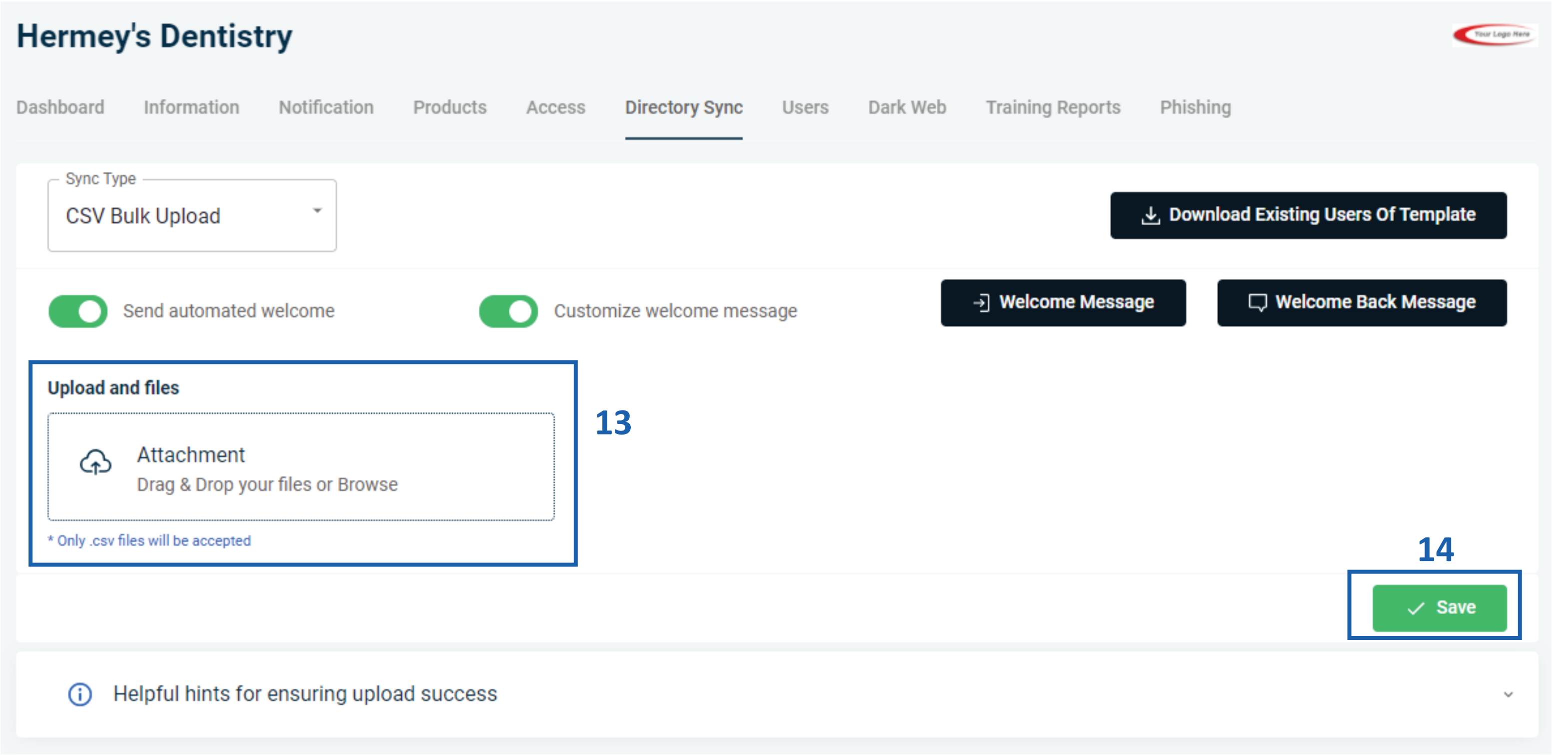
CSV Template Modification & Uploading



13. Once your file is formatted correctly, saved locally, and ready for import, navigate back to your Bulk Manage Users page (refer to pages 39– 41) for the client you wish to edit and click the "**Choose File**" button. Select the file you would like to upload and hit "**Open**".

14. Click "**Save**" to upload the file and begin processing.

Congratulations! You've successfully uploaded a file to modify the users for that client! If you receive any errors or have any questions, reach out to us at support@telesystem.us

IMPORTANT: Please note that user uploads are processed every 15 minutes, so there may be a delay for your changes to show.

You're All Set!

Questions? Comments? Want a 1-on-1 onboarding with our Support team?

Email: support@telesystem.us
Phone: (888) 808 – 6111