

Ver.2019.05.07

Bulk Manage Users .CSV Upload

Partner User Guide



Questions/Concerns?

Email: Operations@breachsecurenow.com Phone: (877) 275 – 4545

Bulk Manage Users Step-by-Step Guide

Step 1: Log in to your partner admin account and click “View” on a client

The screenshot shows a web interface for managing clients. At the top, there is a navigation bar with 'Home > Clients' on the left and 'Profile | Clients | Branded Information' on the right. Below the navigation bar, the word 'Clients' is displayed in red. A horizontal menu contains several action links: 'New Client', 'ESS Dashboard', 'Configure Sync Messages', 'Dark Web Monitoring', and 'Switch to Manager'. Below this menu, there are two buttons: 'Partner Resources <<' and 'Purchase BPP <<'. To the right of these buttons is a search input field with a 'Search' button. Below the search area is a table with the following columns: Name, Account Type, Manager Code, Employee Code, RA Completed, Registered Users, Created, Password Breaches, Active, and Actions. The table contains one row of data for a client named 'Company' with an account type of 'BPP', 16 registered users, created on 08/21/17 at 10:13 am, 36 password breaches, and is active. The 'View' button in the Actions column is highlighted in yellow.

| Name | Account Type | Manager Code | Employee Code | RA Completed | Registered Users | Created | Password Breaches | Active | Actions |
|---------|--------------|--------------|---------------|--------------|------------------|----------------------|-------------------|--------|---|
| Company | BPP | | | | 16 | 08/21/17 10:13 am | 36 | Yes | View Edit |

Step 2: Scroll down to the “Details” section and under users, select “Bulk Manage Users” to add, deactivate, or modify users via using the .CSV upload file here.

The screenshot shows the 'Details' section of the interface. It features a sub-section titled 'Users -Export List'. Below this title, there are three buttons: 'Bulk Manage Users', 'New User', and 'Enable Azure AAD Sync'. The 'Bulk Manage Users' button is highlighted with a red border.

Bulk Manage Users Step-by-Step Guide

Step 3: Click “Configure Messages & Notification Settings” to customize welcome emails and defer the sending of welcome emails in the event you want to send simulated phishing campaigns before users are aware of your cybersecurity program.

Please note these are global settings across all clients. You **must** enter an email address for notifications before uploading your file.

Email sent to new users to the platform

Choose the time the system should wait before sending messages to modified users.

Best email to send success and error message notifications to. This should be a ticketing system or distribution list.

The screenshot shows the 'Bulk Manage Users' configuration page. At the top, there's a breadcrumb 'Home > Bulk Manage Users' and navigation links 'Profile | Clients | Branded Information'. Below the title 'Bulk Manage Users', there's an 'Actions' section with a 'Back to Clients' link. A 'Configure Messages & Notification Settings' link is also present. A note states: 'Please Note: Message & Notification Settings are global settings across all clients.' Below this, there's a checkbox for 'Defer Sending Welcome Message' set to '2 days' with a 'Save' button. To the right, there's a text input for 'Email address to receive bulk upload notifications*' containing 'ticketingsystem@domain.com' and a 'Save' button. A table below lists message types with their respective 'Before Link Text' and 'After Link Text', and an 'Edit' button for each row.

| Message type | Before Link Text | After Link Text | Actions |
|----------------------|--|--|---------|
| Welcome Message | Welcome to our brand-new Cybersecurity Awareness Program! We've all seen the news about the latest, most destructive data breaches. We've decided it's time to take proactive steps in ensuring you have the know-how to defend not only yourself from these threats but our business as well. We are rolling out engaging Security Awareness Training to help us reach our goals. The first step is to set your password in the portal by clicking the button below or pasting the URL into your browser. | Our cybersecurity culture depends on all of us to work together. We ask that you take the time to complete the initial registration and take the security awareness training course. This can be completed in 45 minutes and can be stopped and started at any time. If you have any questions, please contact our support center. | Edit |
| Welcome Back Message | Welcome back! We're happy to have you re-enrolled in our Cybersecurity Awareness Program. To begin, please reset your password by clicking on the button below, or by pasting the link into your browser. | Thank you for resetting your password! If you have any questions, please contact our support center. | Edit |

Email sent to reactivated users

Customize messages and send test emails

Bulk Manage Users Step-by-Step Guide

Step 4: Customizing a message.

Text to show above
the password reset link

Message type you're
editing

The screenshot shows a web interface for editing a customized message. At the top, a breadcrumb trail reads 'Home > Customized Messages > Edit Customized Message' and a user profile section shows 'Profile | Clients | Branded Information'. Below this is a 'Customized Message' header. The main content area is titled 'Edit Customized Message' and shows the current message type as 'Welcome Message'. There are two text editors, each with a rich text toolbar. The first editor is labeled 'Before Link Text' and contains the text: 'Welcome to our brand-new Cybersecurity Awareness Program! We've all seen the news about the latest, most destructive data breaches. We've decided it's time to take proactive steps in ensuring you have the know-how to defend not only yourself from these threats but our business as well. We are rolling out engaging Security Awareness Training to help us reach our goals. The first step is to set your password in the portal by clicking the button below or pasting the URL into your browser.' The second editor is labeled 'After Link Text' and contains the text: 'Our cybersecurity culture depends on all of us to work together. We ask that you take the time to complete the initial registration and take the security awareness training course. This can be completed in 45 minutes and can be stopped and started at any time. If you have any questions, please contact our support center.' At the bottom left is a 'Submit' button, and at the bottom right is a 'Test Message' button.

Text to
show
below
the
password
reset link

Submit to save your changes and
return to the Bulk Manage Users
screen

Send a test message
to your email of
choice

Bulk Manage Users Step-by-Step Guide

Step 5: Click “Download CSV Bulk Upload 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.

Please Note:

Required Fields: firstName, lastName, email, transaction (**do not** change header names).

If the user will have a manager role, place an "X" in the manager column. Leave this field blank for employees.

Transaction column key: Used to manage user access

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)

| | A | B | C | D | E | F | G | H | I | J | K |
|---|---------|------------|-----------|--|-------------|----------------|------------|----------|-------------|-----------|---|
| 1 | userID | firstName | lastName | email | phoneNumber | phoneNumberExt | cellNumber | managers | transaction | tag | |
| 2 | OTQ3OTQ | Employee 1 | Last Name | employee1@domain.com | | | | | A | Finance | |
| 3 | OTQ3OTU | Employee 2 | Last Name | employee2@domain.com | | | | | A | Sales | |
| 4 | OTQ3OTY | Manager 1 | Last Name | manager1@domain.com | | | | x | M | Sales | |
| 5 | OTQ3OTc | Employee 3 | Last Name | employee3@domain.com | | | | | D | Sales | |
| 6 | OTQ3OTg | Employee 4 | Last Name | employee4@domain.com | | | | | A | Marketing | |
| 7 | | | | | | | | | | | |

Do not edit this column. An encrypted unique identifier allows our system to recognize users already in our system.

Grant manager access by marking the column with an “x” for that user

This field isn’t required, but by using this field you will be able to send filtered phishing emails and have access to more detailed reporting based on department.

Bulk Manage Users Step-by-Step Guide

Step 6: Once your file is formatted correctly and ready for import, navigate back to your Bulk Manage Users page for the client you wish to edit and click the “Choose File” button. Select the file you would like to upload and hit “Open”.

The screenshot shows the 'Bulk Manage Users' page. At the top, there is a navigation bar with 'Home > Bulk Manage Users' on the left and 'Profile | Clients | Branded Information' on the right. Below the navigation bar, the page title 'Bulk Manage Users' is displayed in red. Underneath, there are links for 'Actions: Back to Clients', 'Bulk Manage Users' (with a sub-link 'Download CSV Bulk Upload template'), and 'Configure Messages & Notification Settings'. The main section is titled 'Upload .CSV File' and includes helpful hints for ensuring upload success. It lists required fields (firstName, lastName, email, transaction) and provides instructions on how to use the transaction column key (A for Add, D for Deactivate, M for Modify). The client name is 'Bulk Upload client.' Below this, there is a note that only .csv files are accepted. A 'Choose File' button is highlighted with a red box, and a callout box points to it with the text 'Choose the file you wish to upload'. Below the file selection area, there is a 'Submit' button highlighted with a red box, and a callout box points to it with the text 'Hit submit to upload the file and begin processing'.

Choose the file you wish to upload

Hit submit to upload the file and begin processing

* Please note that user uploads are processed every 15 minutes, so there may be a delay for your changes to show. You will receive notification regarding the success of this upload to the email you are currently logged in under in addition to the email address set under the “Configure Messages & Notification Settings”.

Bulk Manage Users Step-by-Step Guide

CONGRATULATIONS!

Your Bulk Upload is Complete

Repeat this process for each of your clients



Questions/Concerns?

Email: Operations@breachsecurenow.com Phone: (877) 275 – 4545 7