

Creating a New Client and Configuring User Management

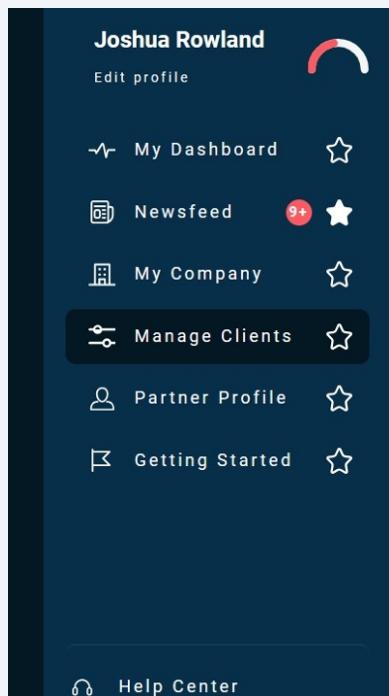


- 1 Navigate to <https://portal.pii-protect.com/#/clients>

- 2 Click "New Client"

A screenshot of the PHI Protect client management interface. At the top, there's a search bar with the placeholder 'h' and a 'Consulting' category selected. To the right are buttons for 'Add Filter' and '+ New Client'. Below the header is a table with columns: Branding, Consulting, Insurance, RA, Users, Approx Breaches, ESS, Industry (with an info icon), and Active. A red circular badge with the number '462' is visible above the 'Approx Breaches' column. The 'New Client' button is highlighted with a yellow circle. The bottom of the screen shows a partial view of a table with data rows.

3 Click this text field.



INIT Consulting

Create New Client

Company Name

Industry ⓘ

4 Enter the client name

5

Select Industry

The INIT Consulting interface shows a 'Create New Client' form. On the left, there is a vertical sidebar with five star icons. The main area has a header 'INIT Consulting'. The 'Create New Client' form includes fields for 'Company Name' (Mears Machine) and 'Industry' (Manufacturing). A blue box highlights the 'Industry' field. A green box highlights the 'Create' button. There are also 'Cancel' and info buttons.

INIT Consulting

Create New Client

Company Name
Mears Machine

Industry Manufacturing

Cancel Create

6

Click "Create"

The INIT Consulting interface shows a 'Create New Client' form. The 'Industry' field is set to 'Manufacturing'. A green box highlights the 'Create' button, which is marked with a checkmark icon. Other buttons include 'Cancel' and an info button.

New Client

Name
Machine

Industry Manufacturing

Cancel Create

7 Click here.

The screenshot shows a mobile application interface. On the left is a sidebar with a dark blue background containing several items: "Dashboard" (with a star icon), "Newsfeed" (with a red notification badge showing "9+" and a star icon), "My Company" (with a star icon), "Manage Clients" (highlighted with a blue bar and a star icon), "Partner Profile" (with a star icon), "Getting Started" (with a star icon), "Support Center" (with a star icon), and "Partner Resource Kit" (with a star icon). To the right of the sidebar, there is a main content area. At the top, it says "Partner HIPAA Compliance Program | Client ID: 85161" with a red notification badge showing "3" and a red circular icon with the number "34". Below this, it says "Industry: Information Technology" and "Mears Machine". Under "Mears Machine", it lists "Product: Unlimited Cybersecurity Training | Client ID: 108673" with a red notification badge showing "0". Further down, it says "Industry: Manufacturing" and "Test Client Product: Unlimited".

8 Click "Training Configuration"

The screenshot shows a mobile application interface titled "Mears Machine". The top navigation bar includes tabs for "Information", "Notification", "Training Configuration" (which is highlighted with an orange circle), "Access", "User Management", and "Dark Web". Below the navigation, there are three sections: "Client Information", "Client Logo", and "Self-Registration Codes". The sidebar on the left is identical to the one in the previous screenshot, showing "Dashboard", "Newsfeed" (with a red notification badge showing "9+" and a star icon), "My Company" (with a star icon), "Clients" (highlighted with a blue bar and a star icon), "Partner Profile" (with a star icon), "Getting Started" (with a star icon), "Support Center" (with a star icon), and "Partner Resource Kit" (with a star icon).

9 Click "User Management"

The screenshot shows the PHI Protect interface. At the top, there is a navigation bar with tabs: Information, Notification, Training Configuration, Access, User Management (which is highlighted with an orange circle), Dark Web, Training Reports, Phish, and a dropdown arrow. Below the navigation bar, there are three cards representing different training courses:

- Security Training - 2023**: Published on 2023-01-01. Duration: 38 mins. Status: Unpublished.
- Cyber Security Training - 2024**: Published on 2024-01-01. Duration: 42 mins. Status: Published.
- Cyber Security Training - 2025**: Not calculated yet. Status: Scheduled for publication on 2025-01-01.

Each card has a "Unpublish Course" button at the bottom.

10 Click "Directory Sync"

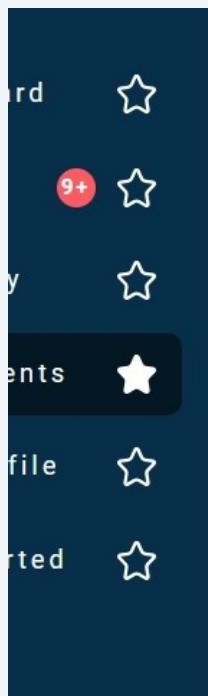
The screenshot shows the Mears Machine interface. At the top, there is a navigation bar with tabs: Information, Notification, Training Configuration, and a dropdown arrow. Below the navigation bar, there are two buttons with red circles: "Directory Sync" and "Single Sign-On".

On the left side, there is a sidebar with a user profile for "Joshua Rowland" and a list of menu items:

- My Dashboard
- Newsfeed (9+)
- My Company
- Manage Clients
- Partner Profile

Each item in the sidebar has a star icon next to it. At the bottom of the sidebar, there is a "Search" input field and a "CSV Bulk Upload" button.

11 Click "Please Select"



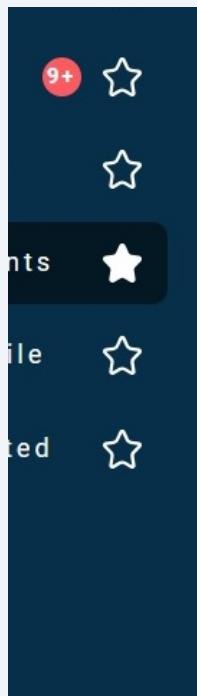
Welcome Message is configured to send immediately after sync.

Choose Your Sync Type

Please Select

A screenshot of a configuration interface. At the top, there's a message about a welcome message being sent immediately after sync. Below it, a section titled "Choose Your Sync Type" contains a dropdown menu. The menu has four options: "Please Select" (which is highlighted with an orange circle), "Azure Active Directory" (also highlighted with an orange circle), "On Premise Active Directory", and "Google Workspace".

12 Click "Azure Active Directory"



Choose Your Sync Type

Please Select

Azure Active Directory

On Premise Active Directory

Google Workspace

A screenshot of the same configuration interface as the previous step. The "Choose Your Sync Type" section is still present. The dropdown menu now shows the four options: "Please Select", "Azure Active Directory" (highlighted with an orange circle), "On Premise Active Directory", and "Google Workspace".

13 Click "Enable"

💡 Welcome Message is configured to send immediately after a new user is added.

Choose Your Sync Type

Send Welcome Message

Azure Active Directory



Enable

Not Verified...



[Enable Manual Setup](#)

Use as Portal Logon

User Principal Name

Authorize Directory Access

14 Click " Authorize Directory Access"

Send Welcome Message

Azure Active Directory



Enable

Not Verified...



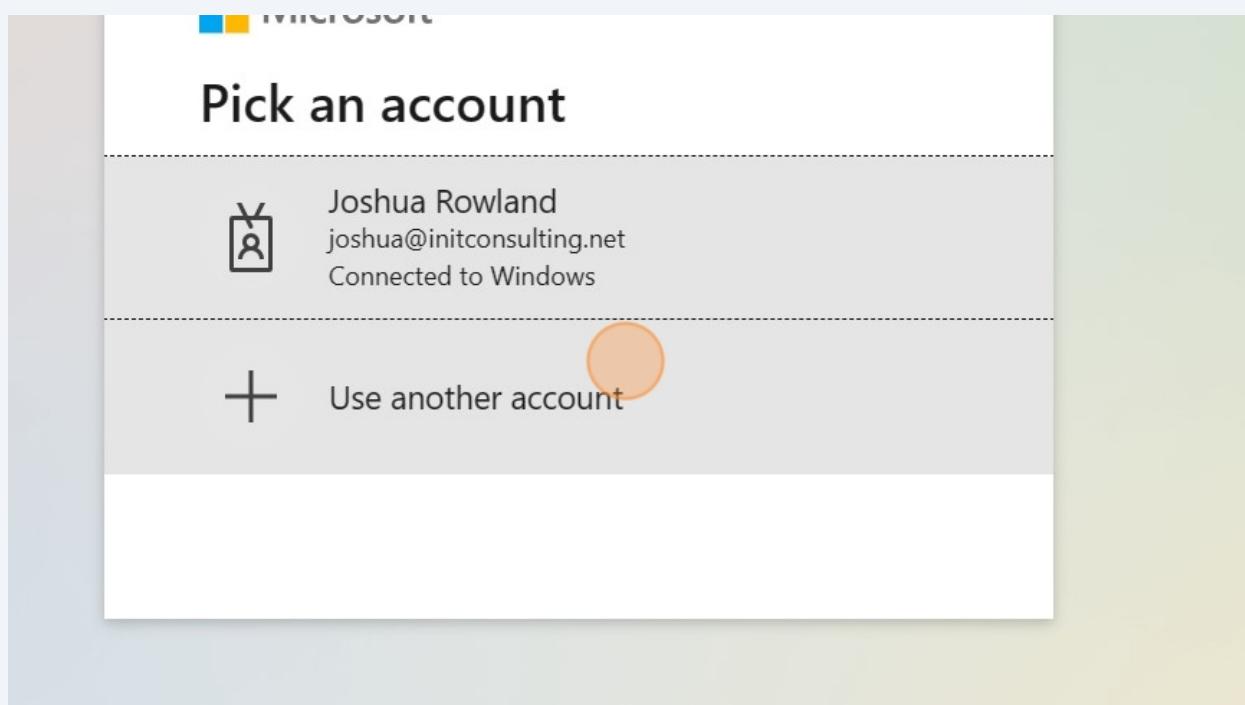
[Enable Manual Setup](#)

Use as Portal Logon

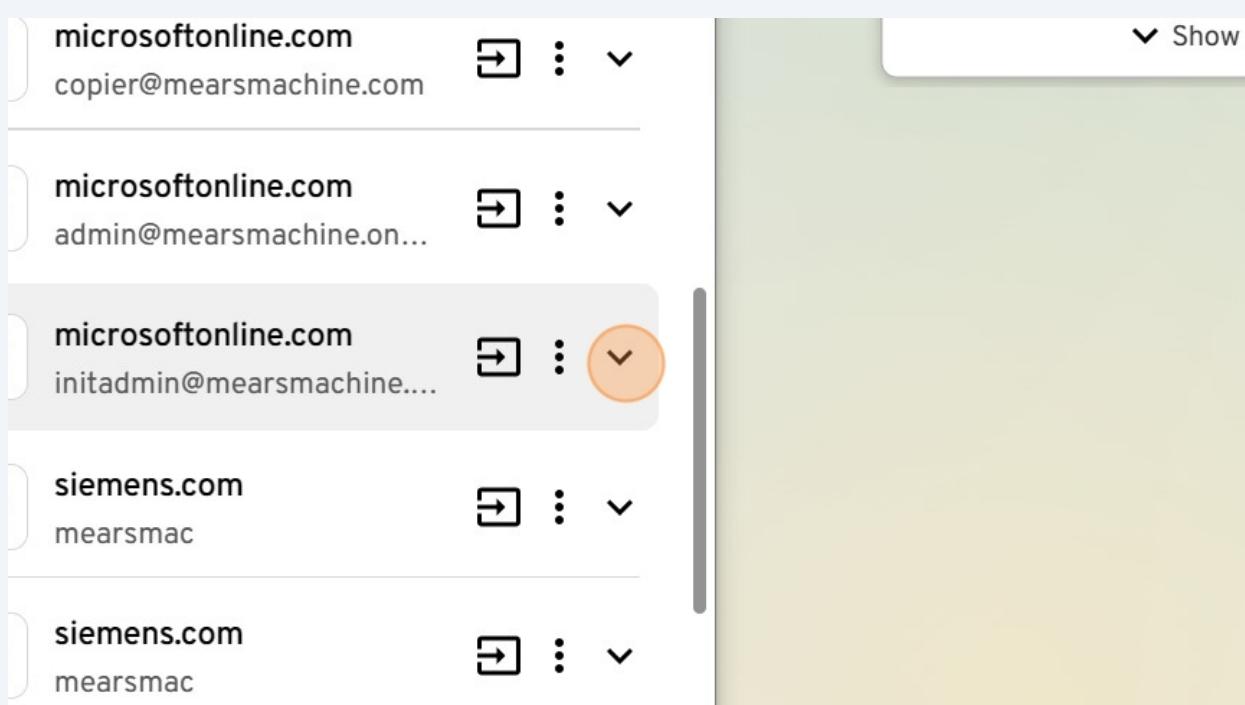
User Principal Name

Authorize Directory Access

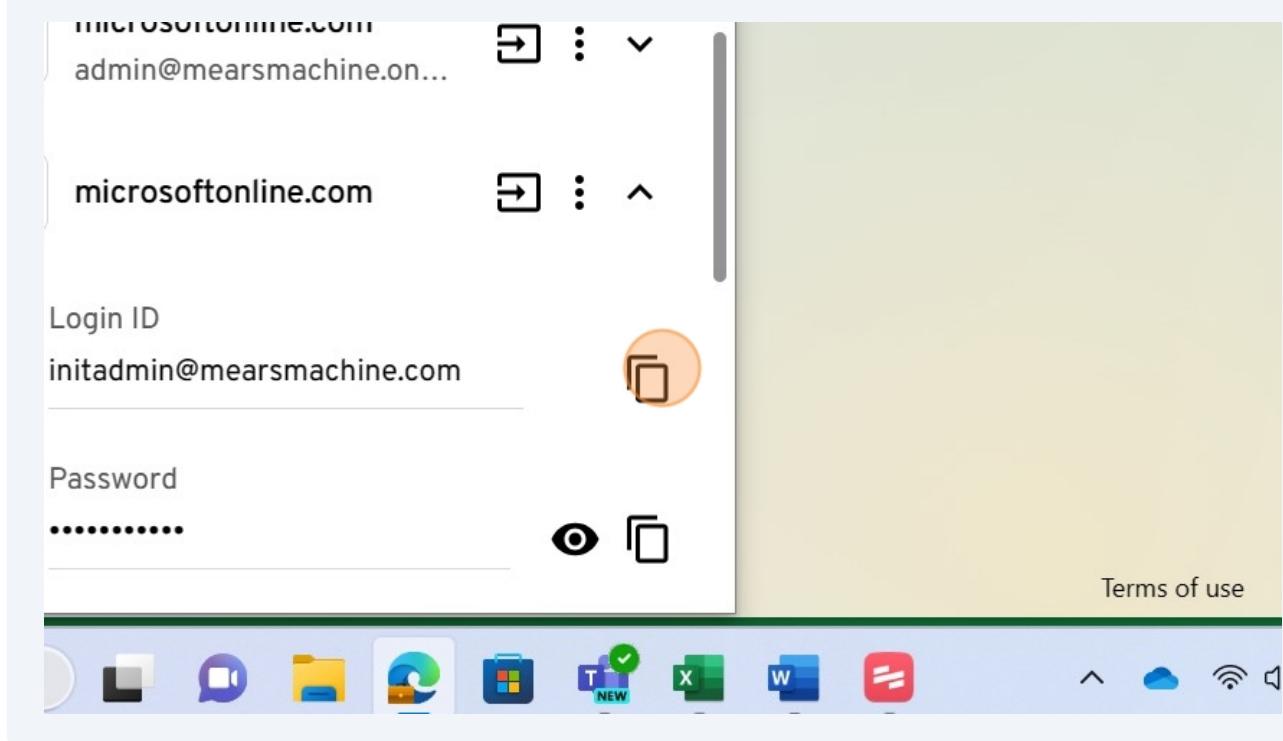
- 15** Sign into an admin account for the tenant



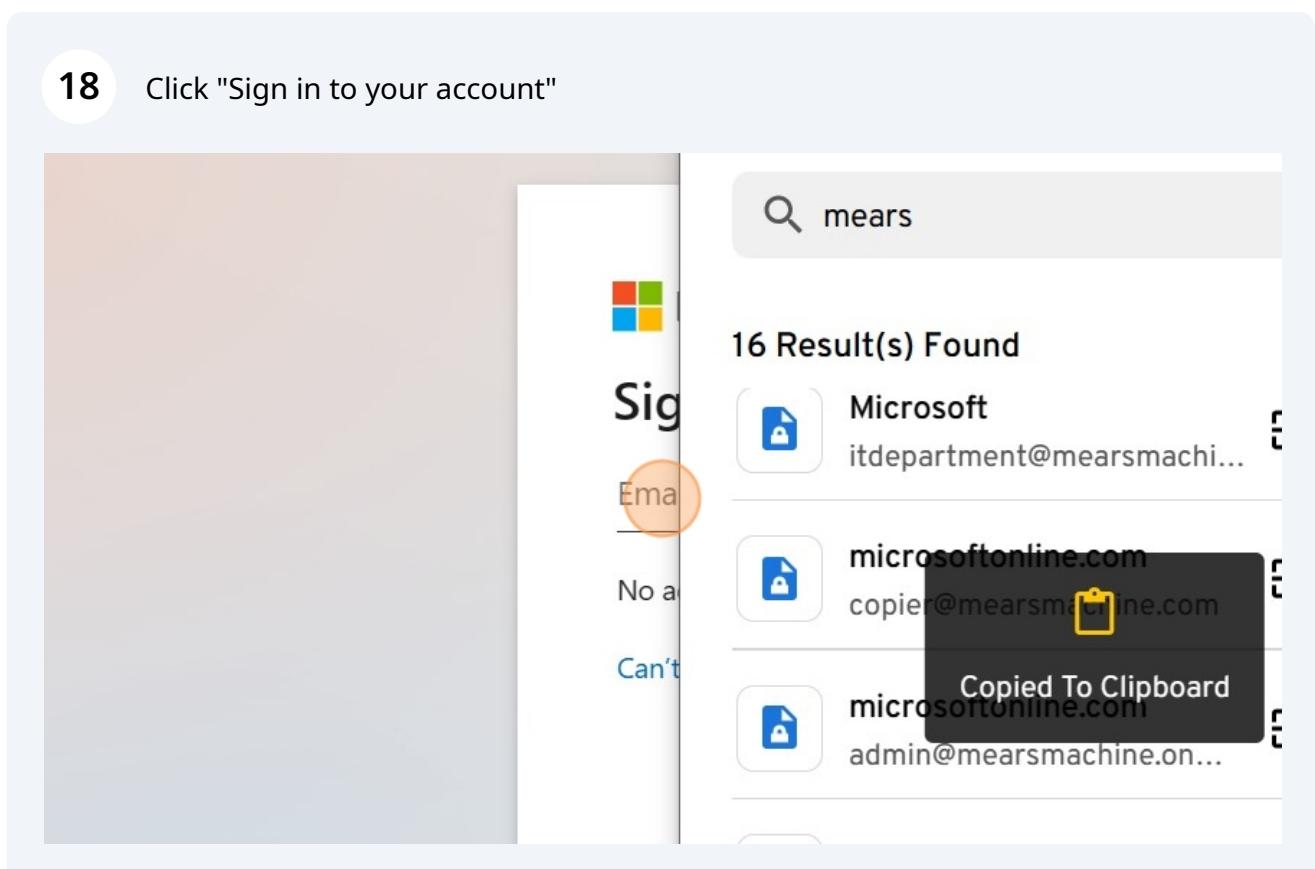
- 16** Click here



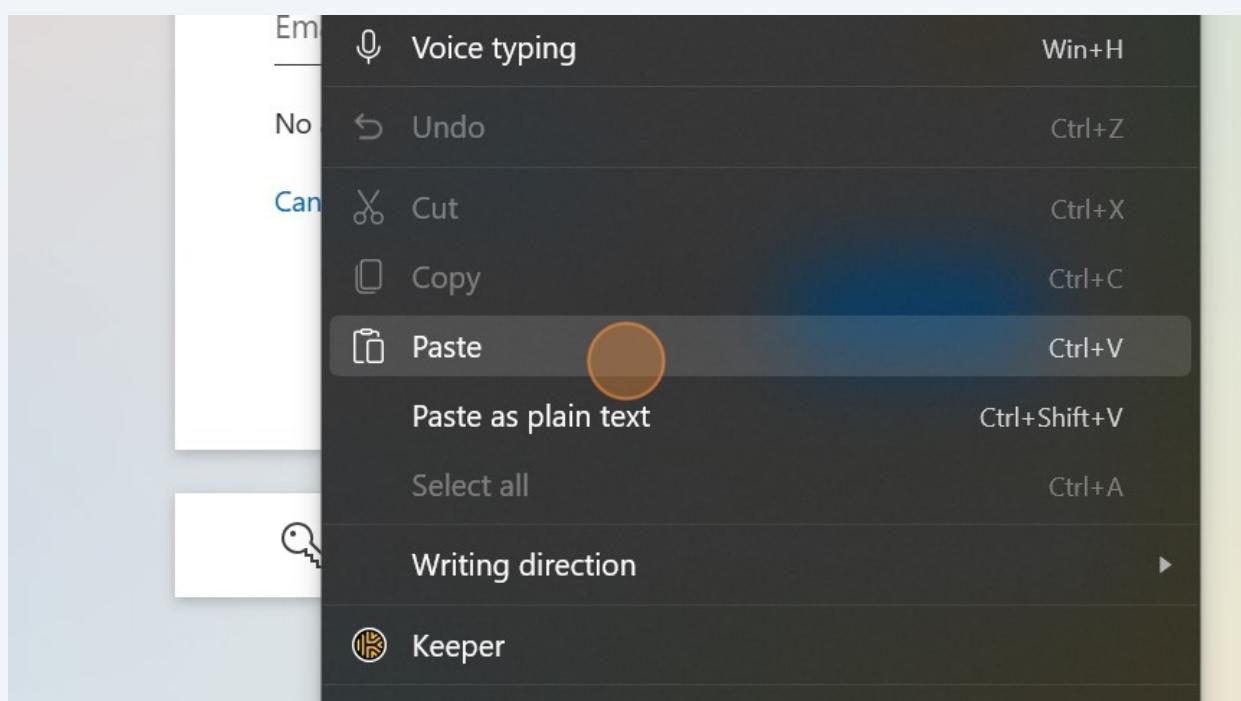
17 Click here



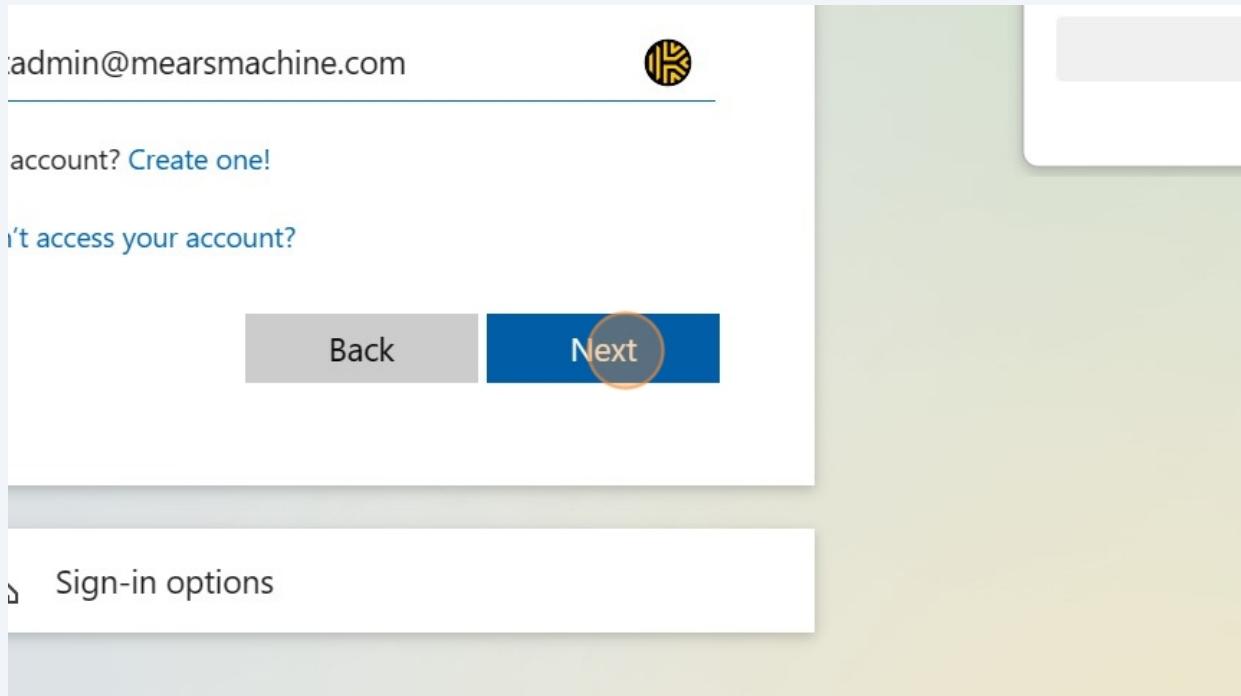
18 Click "Sign in to your account"



19 Click "Paste"

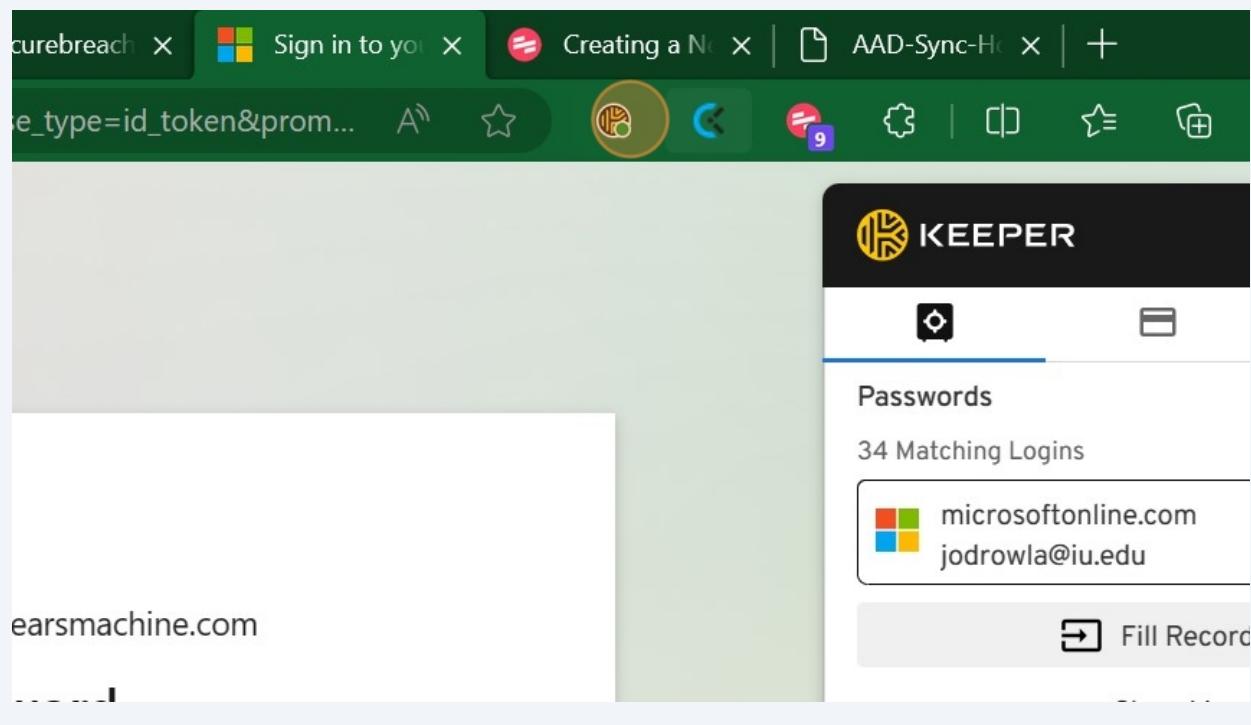


20 Click "Sign in to your account"



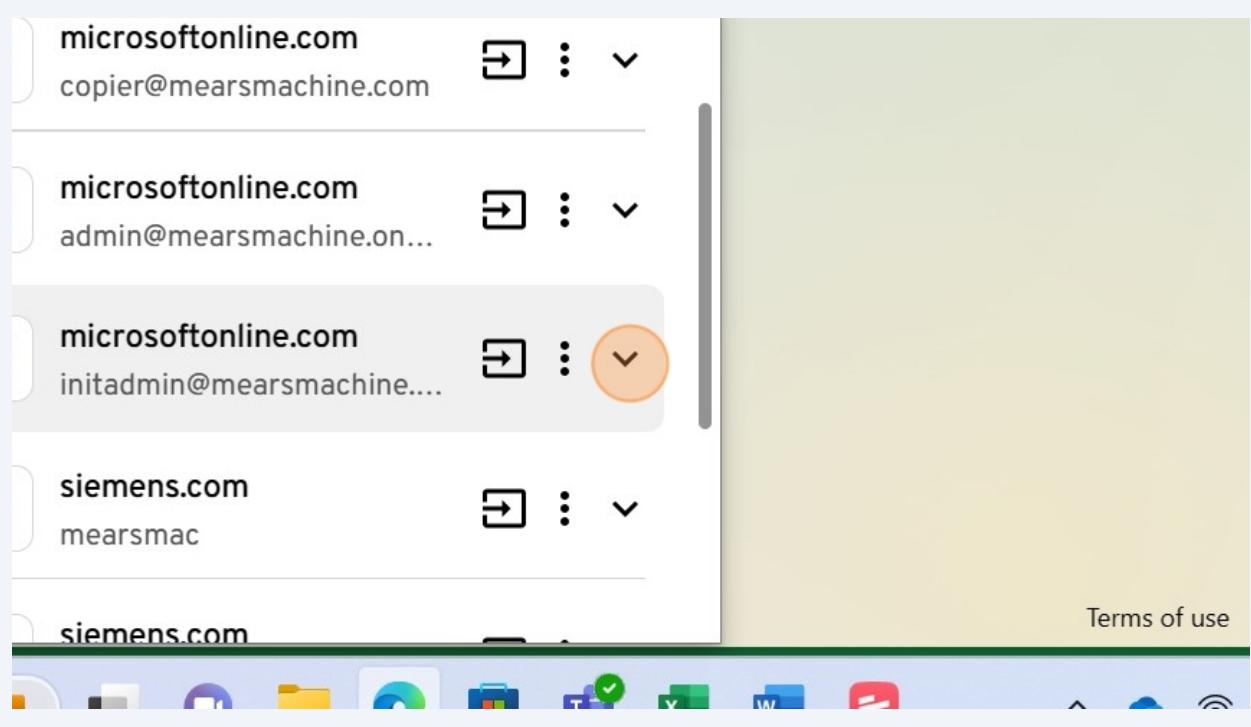
21

Click "Keeper
Has access to this site"

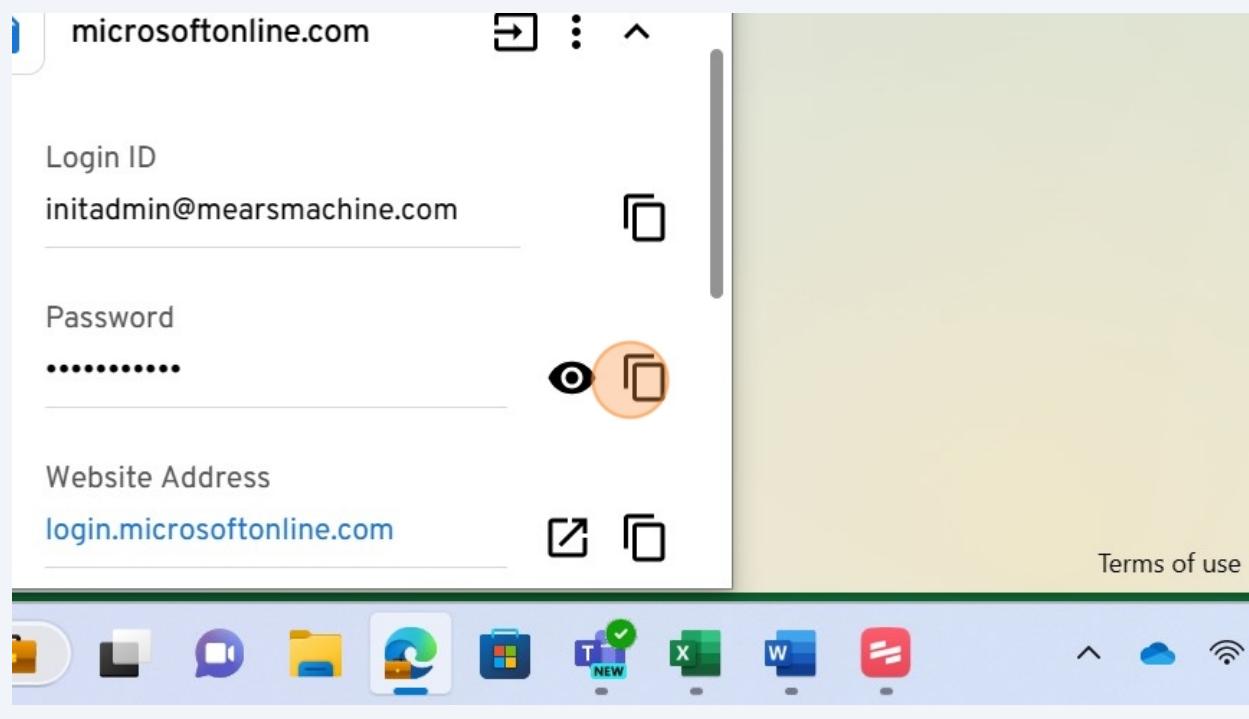


22

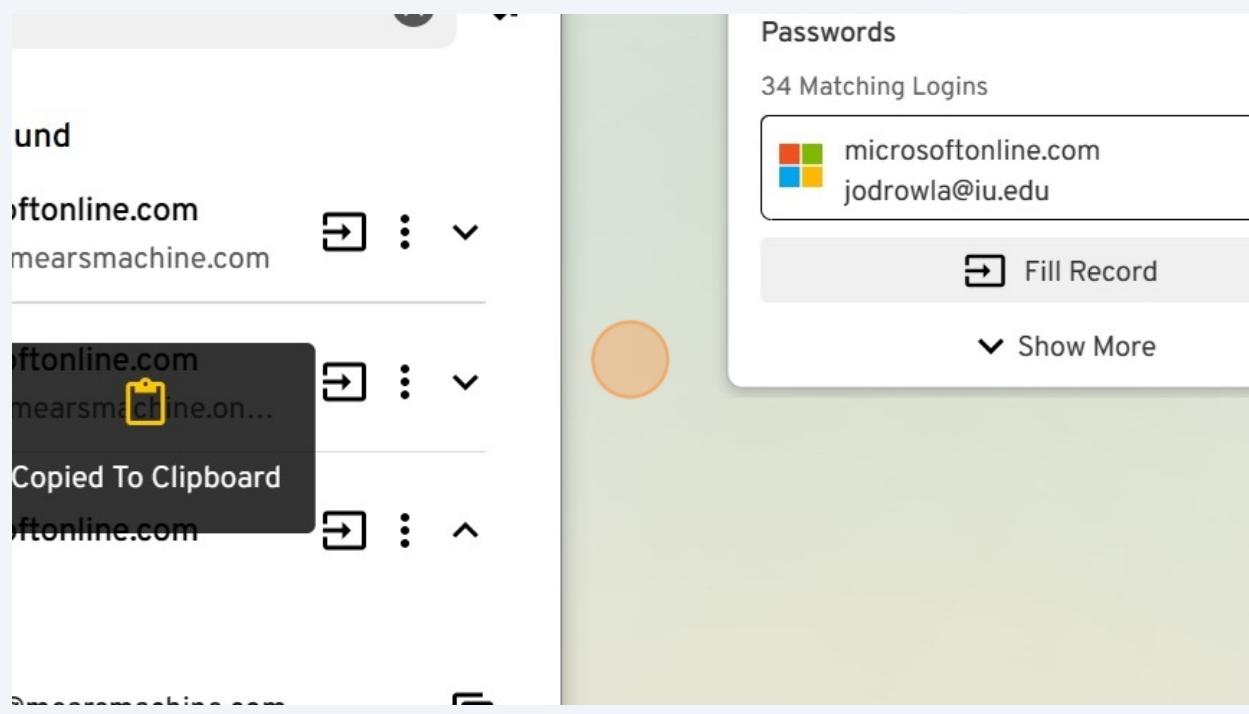
Click here



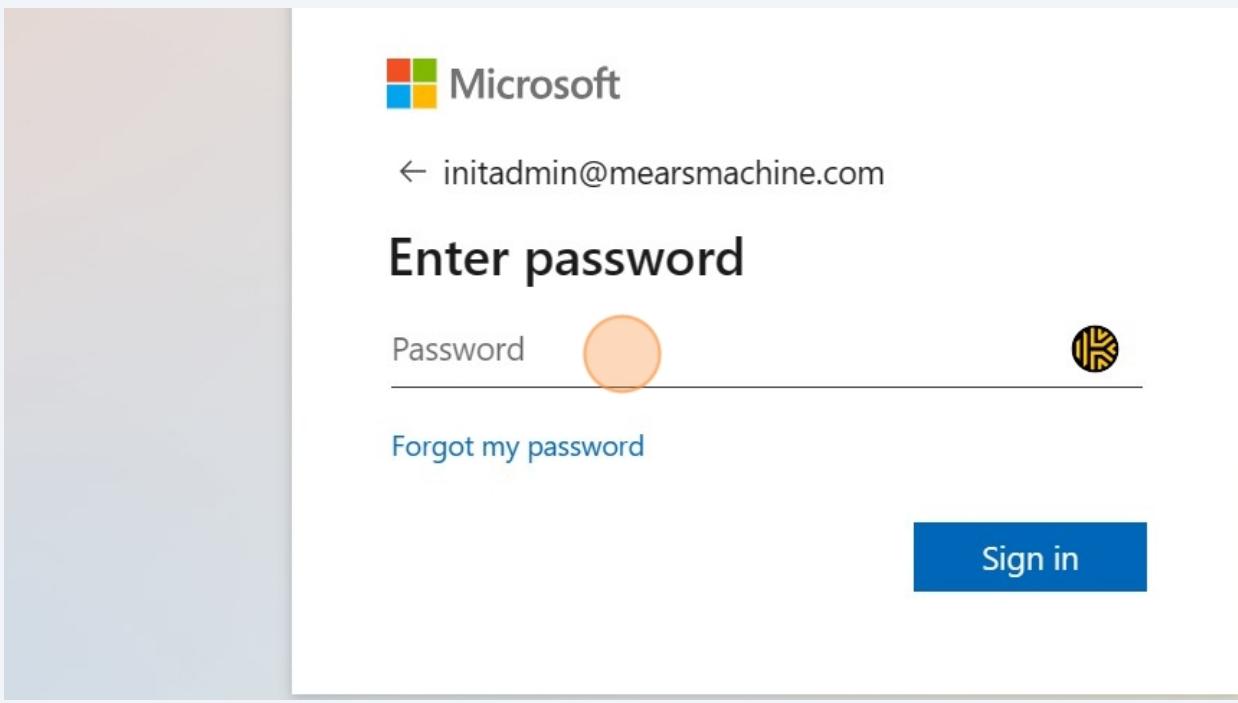
23 Click here



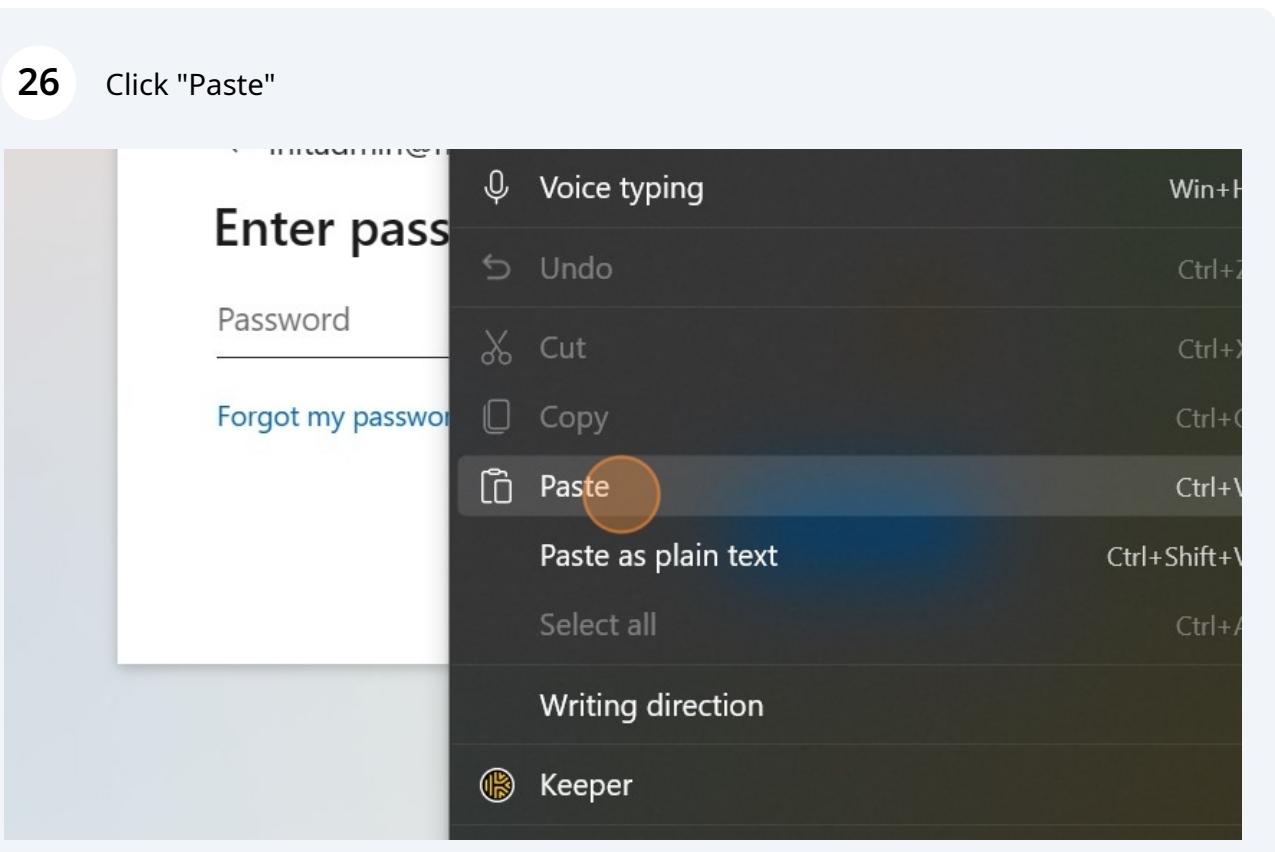
24 Click "Sign in to your account"



25 Right click "Microsoft"



26 Click "Paste"



27 Click "Sign in to your account"

Enter password

.....



[Forgot my password](#)

Sign in

28 Click "Sign in to your account"

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

Cancel

Accept



29 Click here

The screenshot shows a Microsoft Edge browser window with the Microsoft 365 admin center open. The address bar displays the URL <https://admin.microsoft.com>. The main content area is titled "Microsoft 365 admin center". A navigation bar at the top includes "InPrivate", "Home | Microsoft", and "AI". Below the title, there's a "Dashboard view" button and an "Add user" link. The main content area features a large heading "Install your Microsoft 365" and a sub-section "Let's get Skype for Business installed and activated on your device". On the left side of the dashboard, there's a sidebar with various links: Home, Users, Teams & groups (which is highlighted with an orange circle), Roles, Resources, Billing, and Settings.

30 Click here

This screenshot is similar to the previous one, showing the Microsoft 365 admin center dashboard in Microsoft Edge. The "Teams & groups" link in the sidebar is highlighted with an orange circle. The main content area contains the same "Install your Microsoft 365" section and sidebar links as the previous screenshot.

31 Click here

A screenshot of the Microsoft 365 Admin Center. On the left, there's a sidebar with a large redacted area. The main menu on the right includes 'Home', 'Users', 'Teams & groups' (which is expanded), 'Active teams & groups' (highlighted with an orange circle), 'Deleted groups', 'Shared mailboxes', 'Roles', and 'Resources'. The 'soft 365' watermark is visible on the right.

32 Click here

A screenshot of the Microsoft 365 Groups page. The top navigation bar shows 'store files', 'Microsoft 365' (selected), 'Distribution list', and 'Mail-enabled security group'. Below the bar, there's a search bar with 'Add a group (Shift+A+G)' and a button labeled 'Add a group' (highlighted with an orange circle). Other buttons include 'Export' and 'Refresh'. A table below lists a single group: 'Name ↑' followed by 'FTT Low Speed Shaft Schedule'. The left sidebar has sections for 'Employees' (highlighted with a red circle), 'PII/PHI Protection', and 'the group.'

33 Click here

The screenshot shows a Microsoft 365 security settings page. On the left, there is a sidebar with some text about PII/PHI Protect portal access. The main area has a section titled "Security" with a description: "Controls access to OneDrive and SharePoint and can manage Microsoft 365." Below this is a "Next" button. At the bottom, there is a ribbon with various icons.

34 Click here

The screenshot shows a Microsoft Groups creation form. On the left, there is a sidebar with some text about group creation. The main area has a "Basics" tab selected. It asks to enter basic info about the group. There is a "Name *" field containing "New group" and a "Description" field with the placeholder "Enter a description for your new group".

35 Click here

er that client.
users in the
s BSN-

cess to
ployee data
Protect portal.
above
re NOT
or within the

Enter a description for your new group



Back

Next

36 Click here

cess to
ployee data
Protect portal.
above
re NOT
or within the

Next



37 Click here

The screenshot shows the Microsoft 365 admin center interface. The URL in the browser is https://admin.microsoft.com. The page title is "Microsoft 365 admin center". The breadcrumb navigation shows "Home > Active teams and groups > Add a group". A blue circular icon labeled "Owners" is visible. The main heading is "Assign owners". A large orange circle highlights the "Add a group" button in the top right corner of the toolbar.

38 Click here

The screenshot shows the Microsoft 365 admin center interface. The URL in the browser is https://admin.microsoft.com. The page title is "Microsoft 365". The top navigation bar includes "Distribution list" and "Mail-enabled security". The toolbar features "Add a group" (highlighted with an orange circle), "Export", "Refresh", and "3 items". The main table lists two items: "FTT Low Speed Shaft Schedule" and "MMC". The table has columns for "Name" (with an up arrow) and other settings. A sidebar on the left contains partial text: "ith ease. Add, without a hitch.", "ployees group", "parameters:", "ployees", and "PHI Protect".

39 Click here

Creates an email address for a group of people.

the BSN-Employees group
e following parameters:

Mail-enabled security
A distribution list that can also be used to control SharePoint.

Security
Controls access to OneDrive and SharePoint and can be used to manage Microsoft 365.

sure not to assign non-user

File Explorer icon

Next button

40 Click here

the BSN-Employees group
e following parameters:

Security
Controls access to OneDrive and SharePoint and can be used to manage Microsoft 365.

Next button

File Explorer icon

41 Click here

The screenshot shows a mobile application interface. On the left, there is a vertical sidebar with some placeholder text: 'NOT within the' at the top and 'ase. Add, put a hitch.' below it. The main content area has a green header bar with the title 'Basics'. Below the header, there is a text input field labeled 'Name *' with the placeholder 'New group'. A large orange circle highlights the right edge of this input field. Below the name field is a section labeled 'Description' with a placeholder 'Enter a description for your new group'. The entire form is contained within a light gray rounded rectangle.

42 Click here

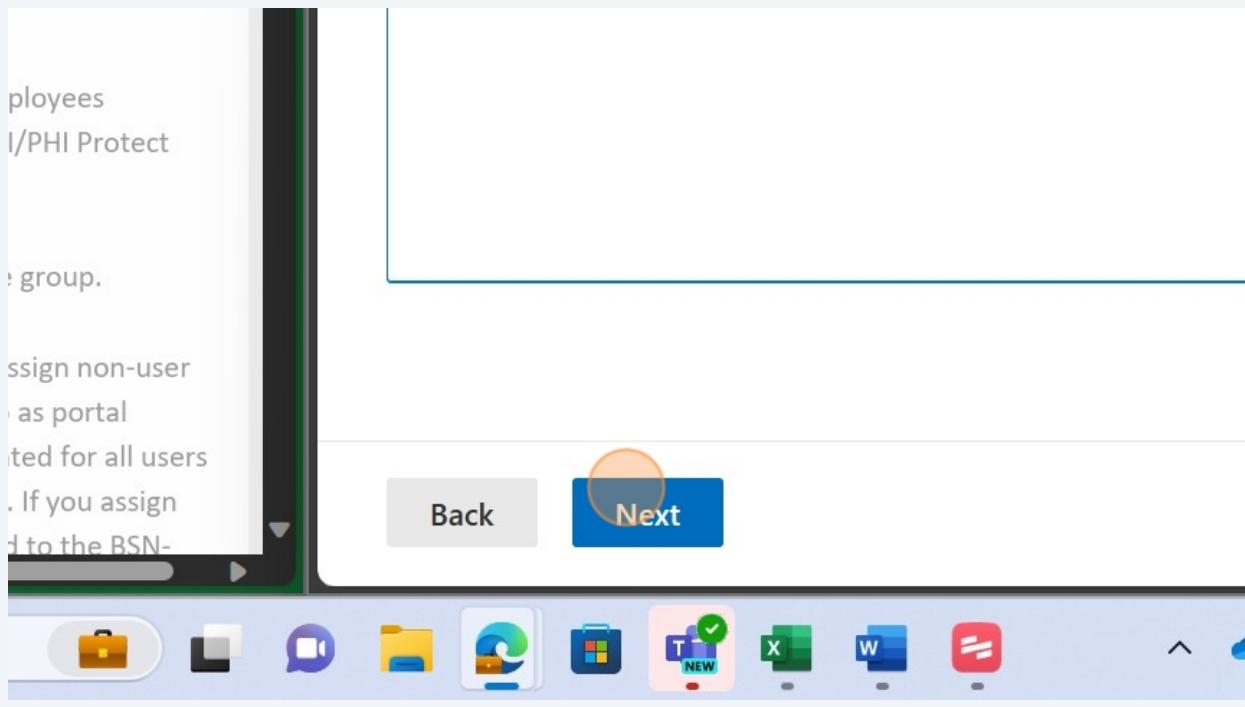
Name *

BSN-Employees

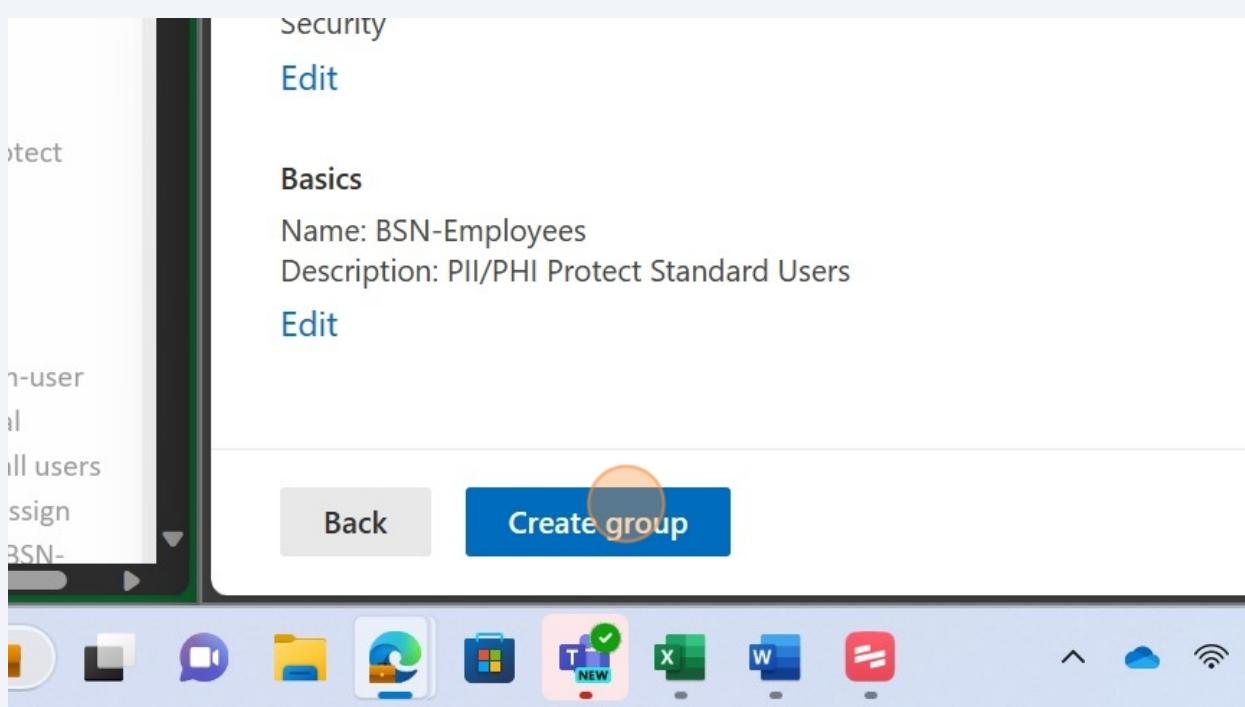
Description

Enter a description for your new group

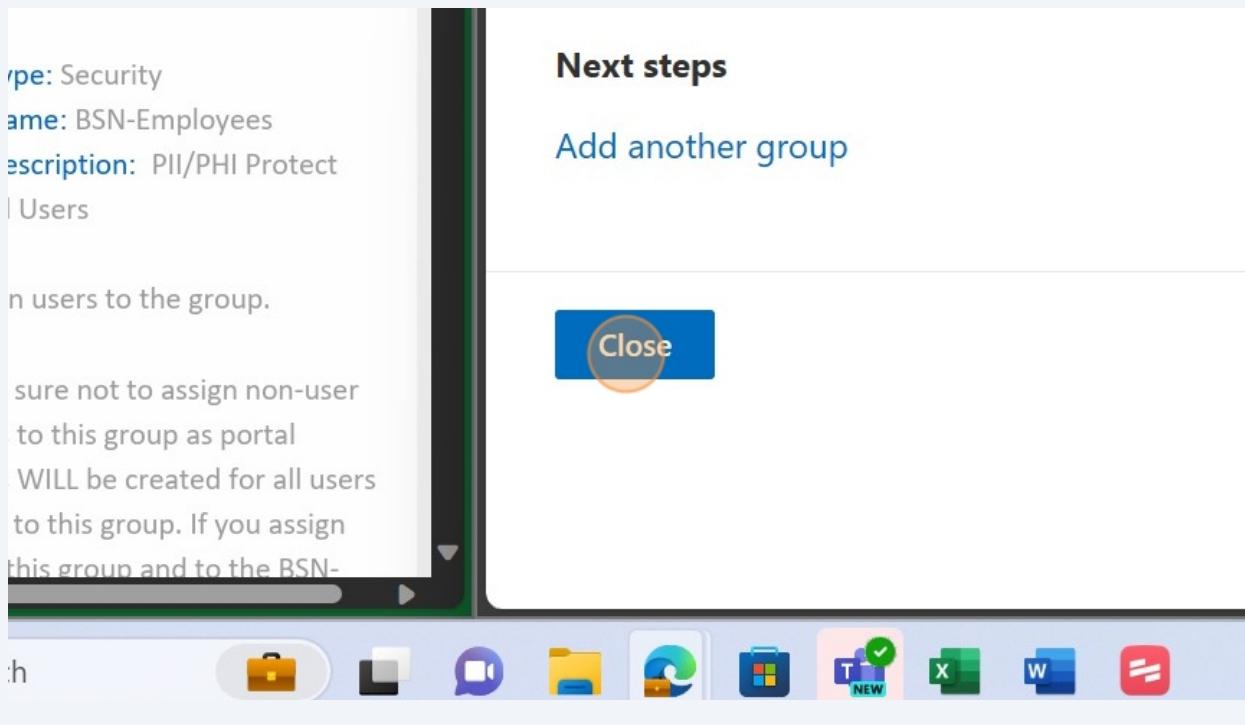
43 Click here



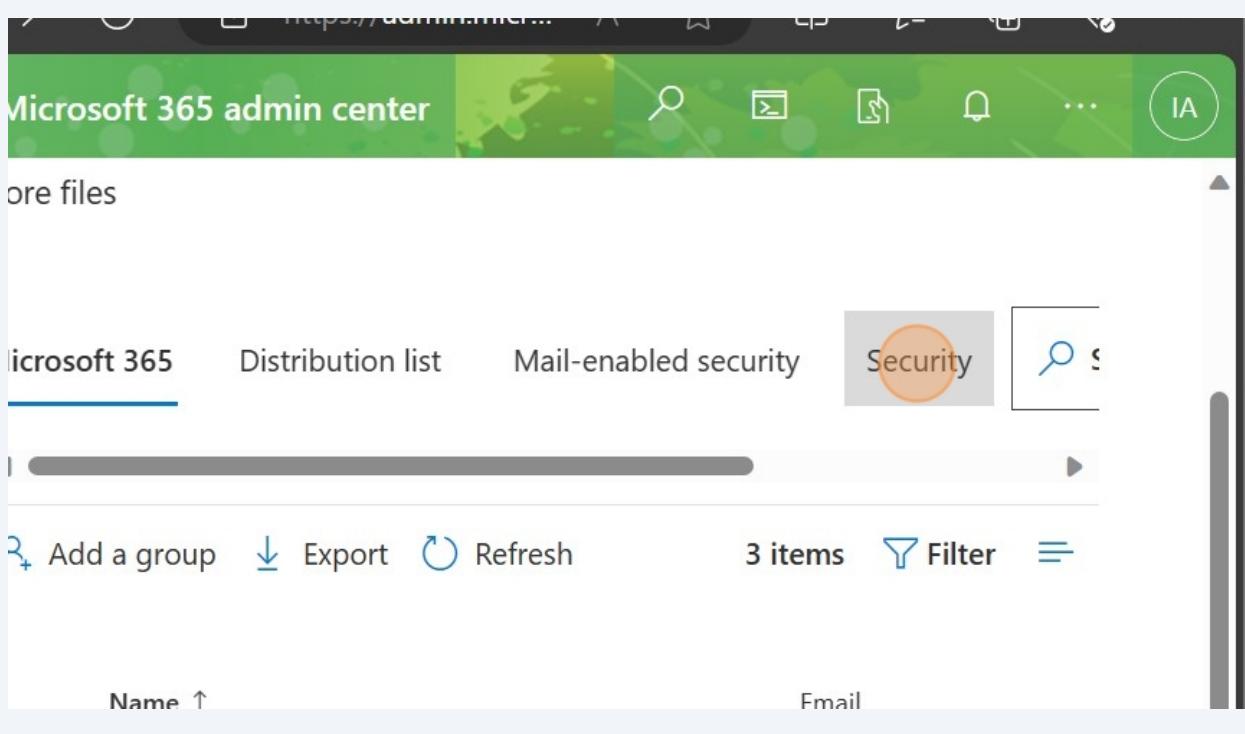
44 Click "Create group"



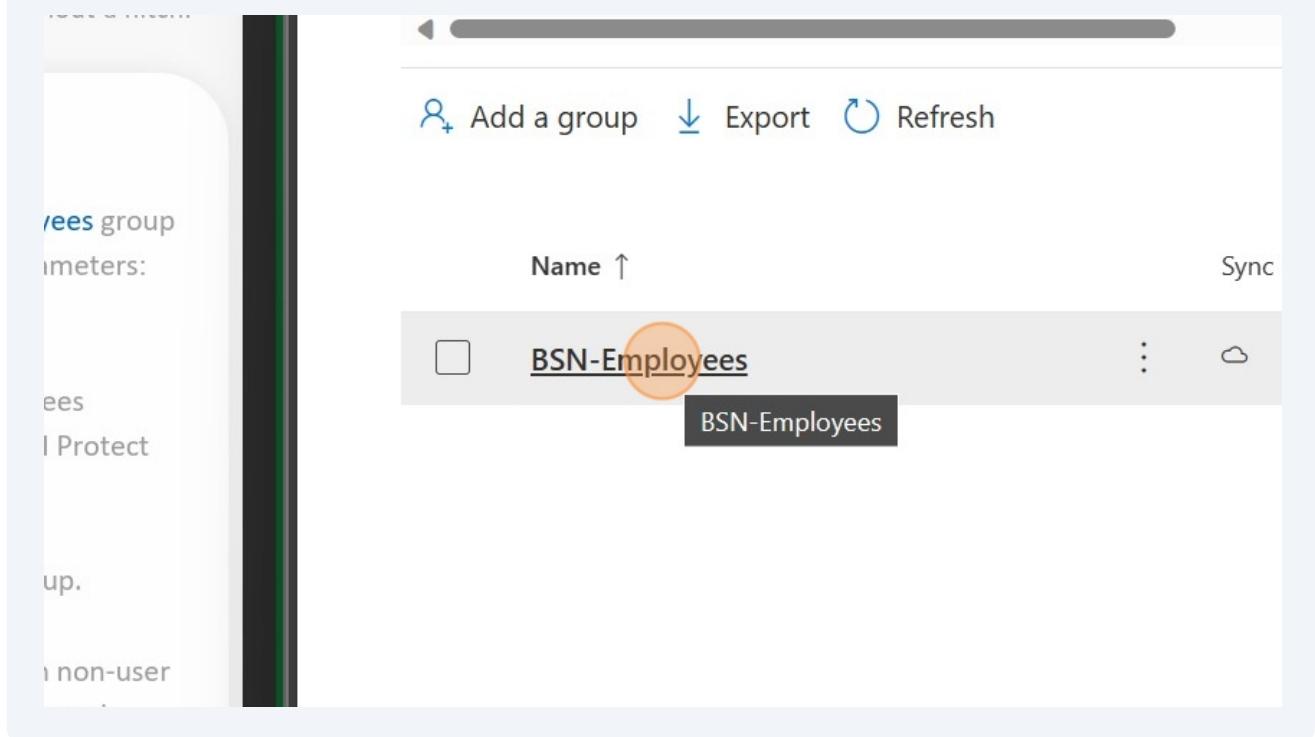
45 Click here



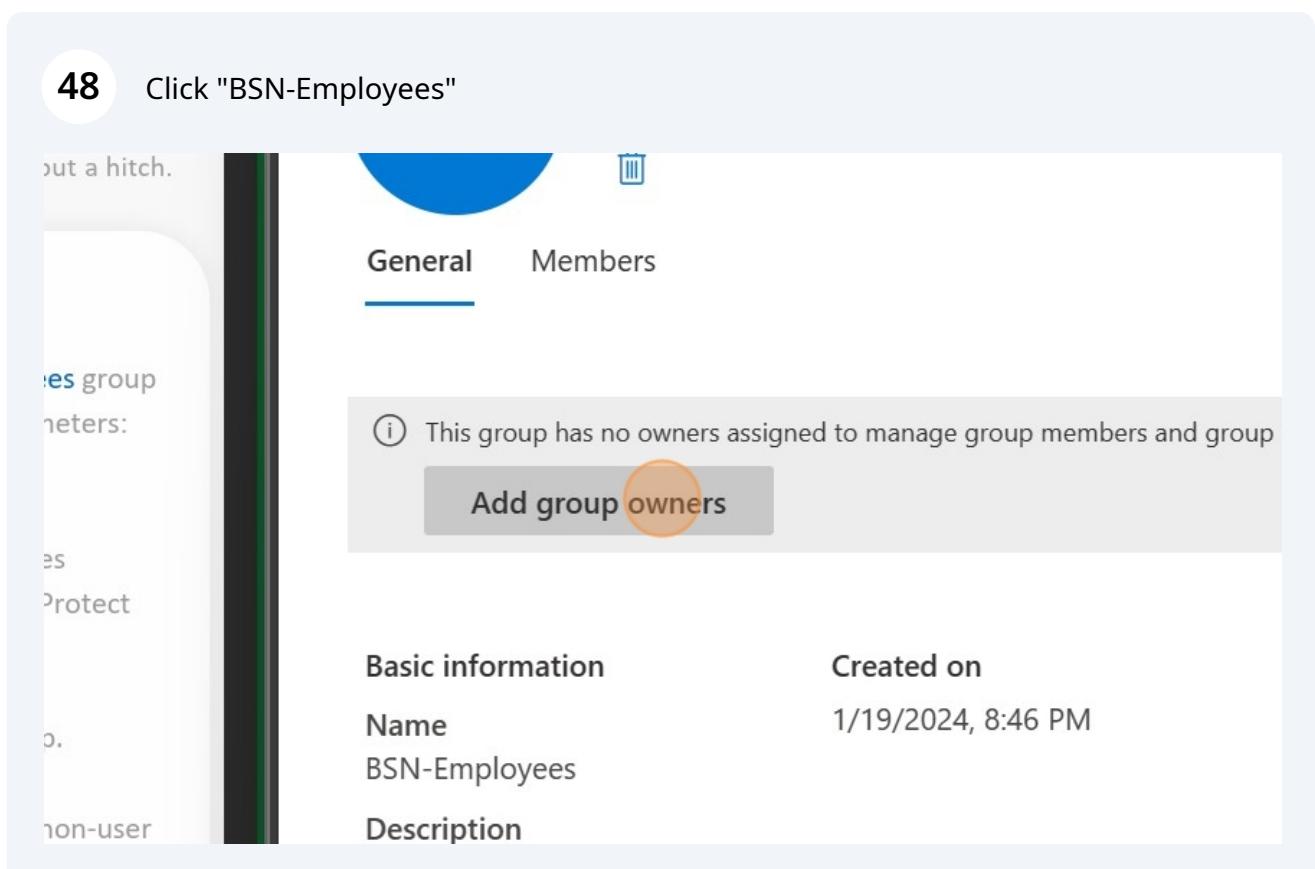
46 Click here



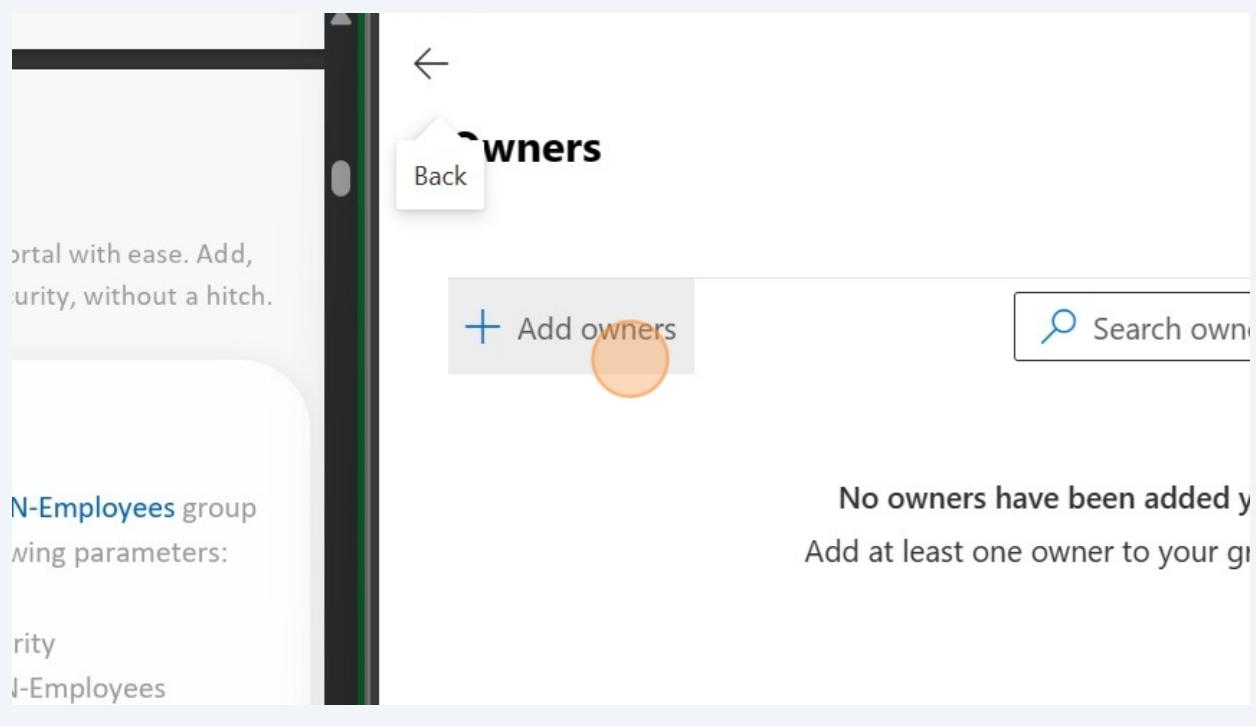
47 Click here



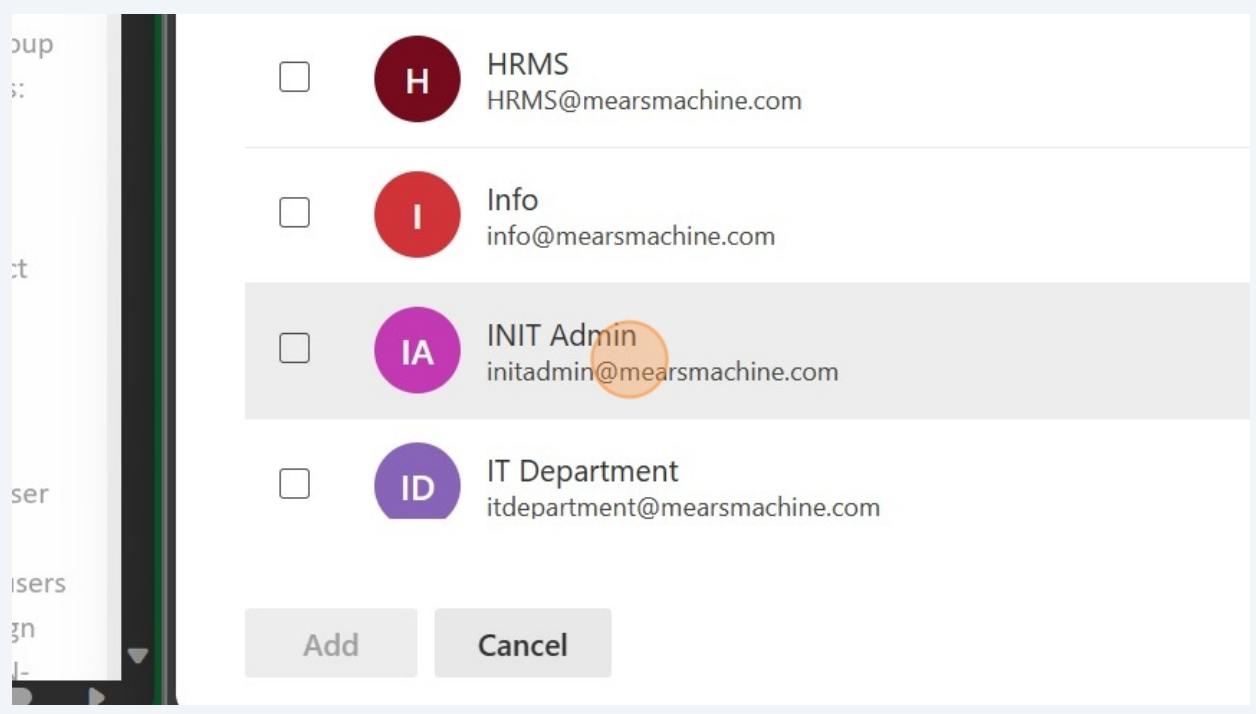
48 Click "BSN-Employees"



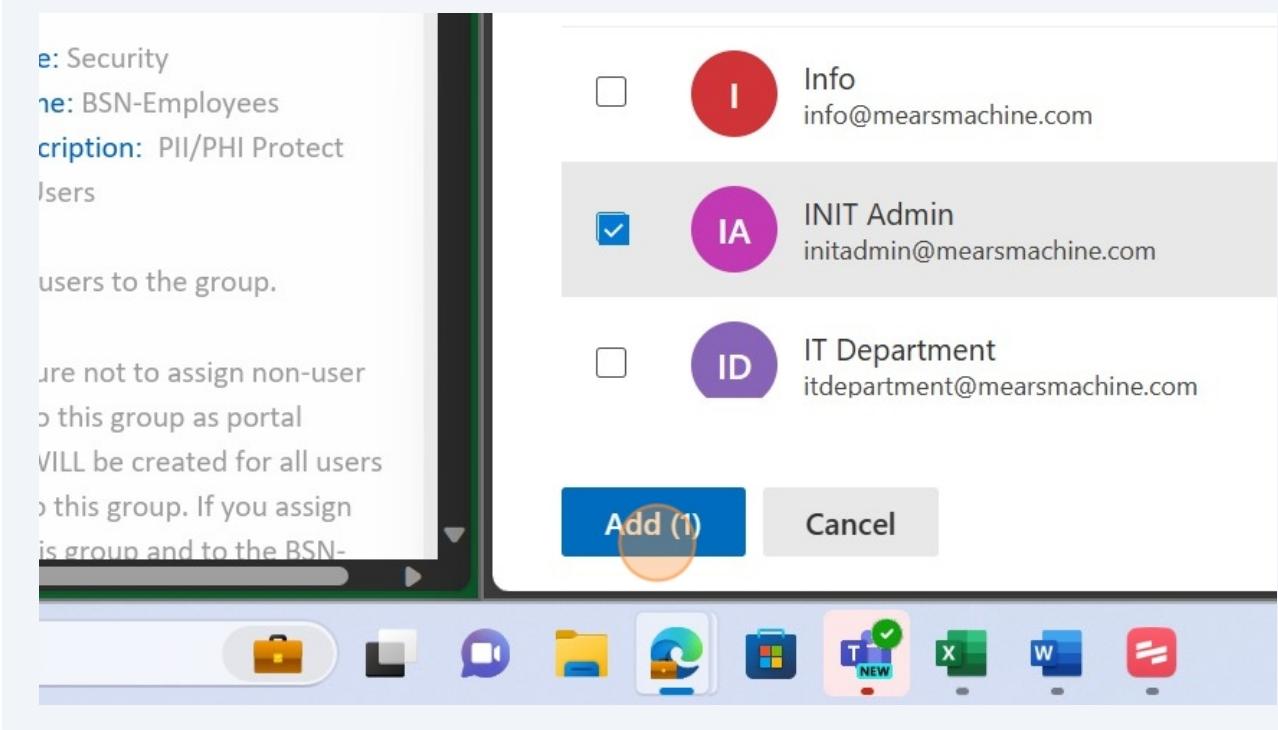
49 Click here



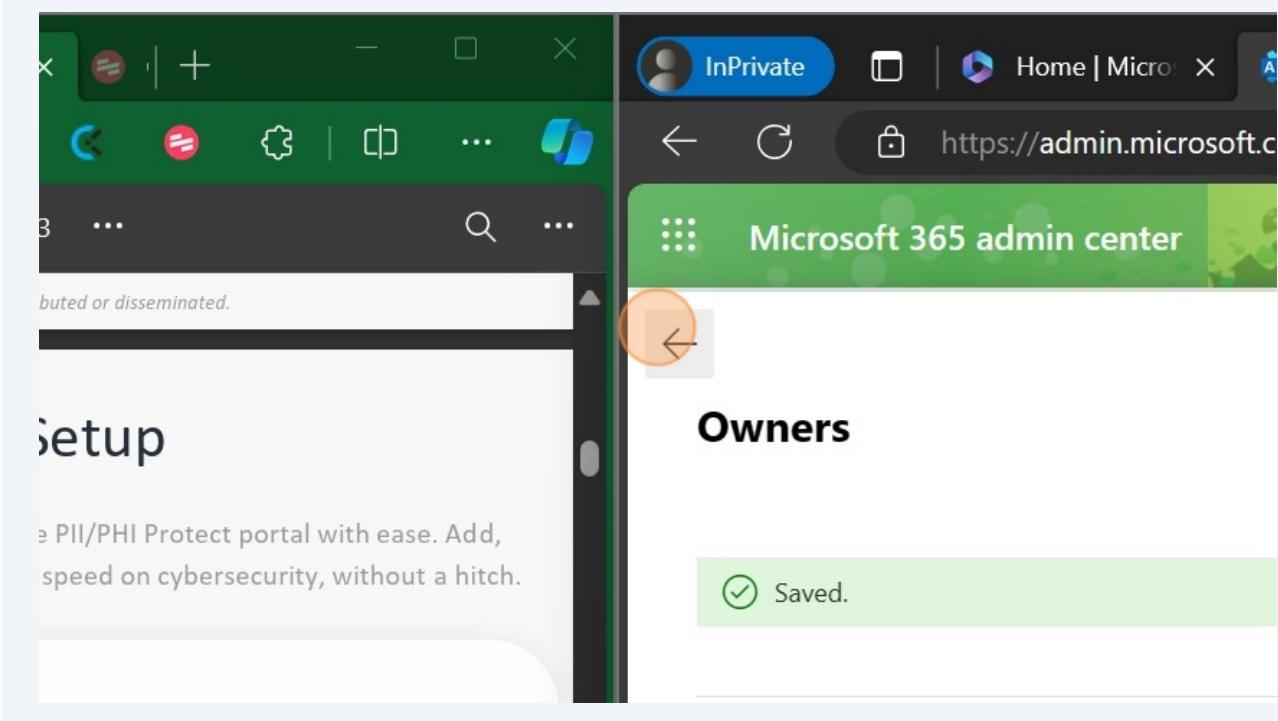
50 Click here



51 Click here



52 Click here



53 Click here

The screenshot shows a Microsoft Teams security group named 'BSN-Employees'. The group has a blue circular icon with a white letter 'B'. Below the icon, there are tabs for 'General' and 'Members', with 'Members' being the active tab (highlighted with an orange circle). The 'General' tab has a blue underline. To the right of the tabs, it says 'Security group • 1 owner • 0 members'. Below this, there is a small trash can icon. The main content area is divided into two columns: 'Basic information' and 'Created on'. Under 'Basic information', the name is listed as 'BSN-Employees'. Under 'Created on', the date and time are listed as '1/19/2024, 8:46 PM'. On the far left, there is a vertical sidebar with some partially visible text: 'with ease. Add, without a hitch.', 'ployees group parameters:', 'ployees /PHI Protect', and 'ees Protect'. A large orange circle highlights the 'Members' tab.

54 Click here

The screenshot shows the profile page for a user named 'INIT Admin' with the email address 'initadmin@mearsmachine.com'. The page includes a photo placeholder and a link to 'View all and manage owners'. Below this, there is a section for 'Members (0)' with a link to 'View all and manage members' (which is highlighted with an orange circle). At the bottom of the page is a ribbon with various icons: a briefcase, a document, a video camera, a folder, a gear, a task list (highlighted with an orange circle), an Excel sheet, a Word document, and a Powerpoint slide. The ribbon also features standard navigation icons like back, forward, and search.

55 Click here

the group.
to assign non-user
roup as portal
created for all users
oup. If you assign
and to the BSN-
ne manager role will



Members

+ Add members

Search r

No members have been ad

Add at least one member to yo

56 Click here

tect portal with ease. Add,
bersecurity, without a hitch.

BSN-Managers group with
ing parameters:
Type: Security
ame: BSN-Managers



BL

Backup Admin LhY4
backupadminLhY4@mearsmachine.cc



BS

Bob Schmidt
bob.schmidt@harrisonmanufacturing



B

Braxton
braxton@mearsmachine.com



BR

Bryan Barton

Add

Cancel

57 Click here

ted.

Select portal with ease. Add, security, without a hitch.

3SN-Managers group with parameters:

Type: Security
Name: BSN-Managers

Bob Schmidt bob.schmidt@harrisonmanufacturing.c

Braxton braxton@mearsmachine.com

Bryan Barton bbarton@mearsmachine.com

Caleb Serotko Cserotko@mearsmachine.com

Add (1) Cancel

This screenshot shows a user selection interface. On the left, there is a sidebar with the text "ted.", "Select portal with ease. Add, security, without a hitch.", "3SN-Managers group with parameters:", "Type: Security", and "Name: BSN-Managers". On the right, there is a list of users with checkboxes next to their names. The users listed are Bob Schmidt, Braxton, Bryan Barton, and Caleb Serotko. Below the list are two buttons: "Add (1)" and "Cancel".

58 Click here

Select portal with ease. Add, security, without a hitch.

3SN-Managers group with parameters:

Type: Security
Name: BSN-Managers

Bryan Barton bbarton@mearsmachine.com

Caleb Serotko Cserotko@mearsmachine.com

Carl Pritchett cpritchett@mearsmachine.com

Chris Inman

Add (2) Cancel

This screenshot shows a user selection interface. On the left, there is a sidebar with the text "Select portal with ease. Add, security, without a hitch.", "3SN-Managers group with parameters:", "Type: Security", and "Name: BSN-Managers". On the right, there is a list of users with checkboxes next to their names. The users listed are Bryan Barton, Caleb Serotko, Carl Pritchett, and Chris Inman. Below the list are two buttons: "Add (2)" and "Cancel".

59 Click here

The screenshot shows a list of users for selection. Each user has a checkbox to their left and a circular icon with initials to their right. The users listed are:

- Caleb Serotko (checkbox unchecked, CS icon)
- Carl Pritchett (checkbox checked, CP icon)
- Chris Inman (checkbox unchecked, CI icon)
- conf (checkbox unchecked, C icon)

At the bottom of the list are two buttons: "Add (3)" and "Cancel".

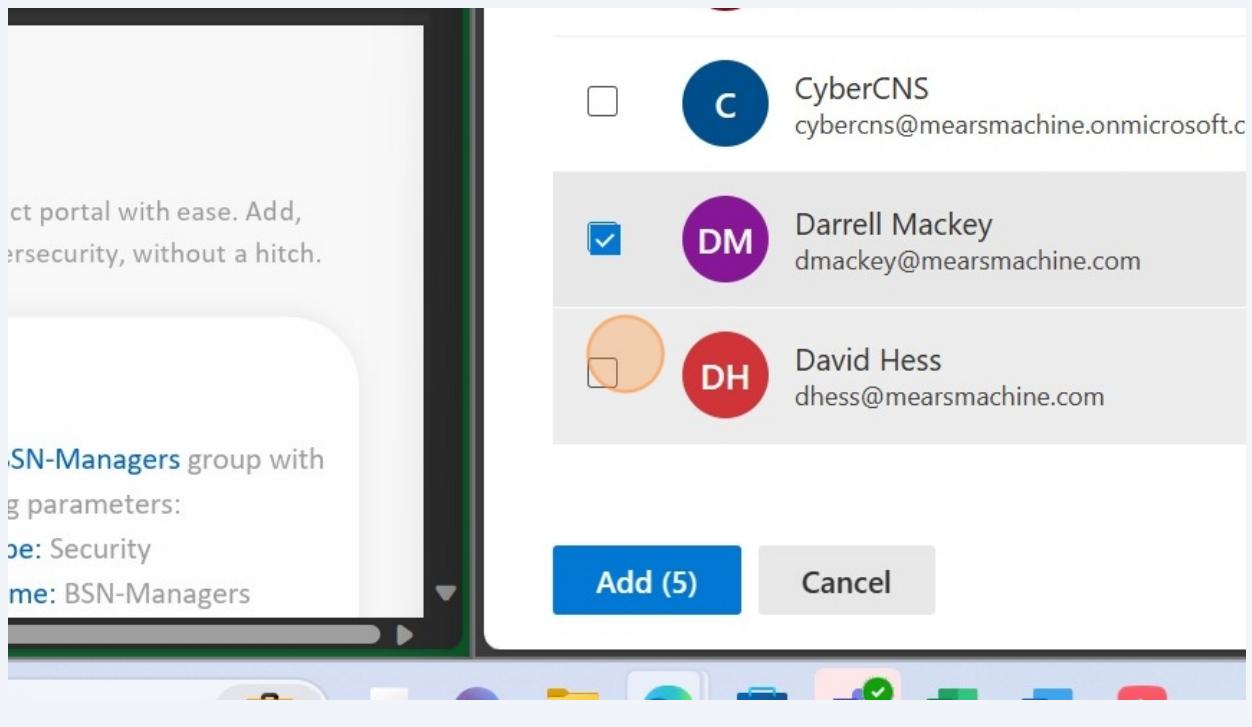
60 Click here

The screenshot shows a list of users for selection. Each user has a checkbox to their left and a circular icon with initials to their right. The users listed are:

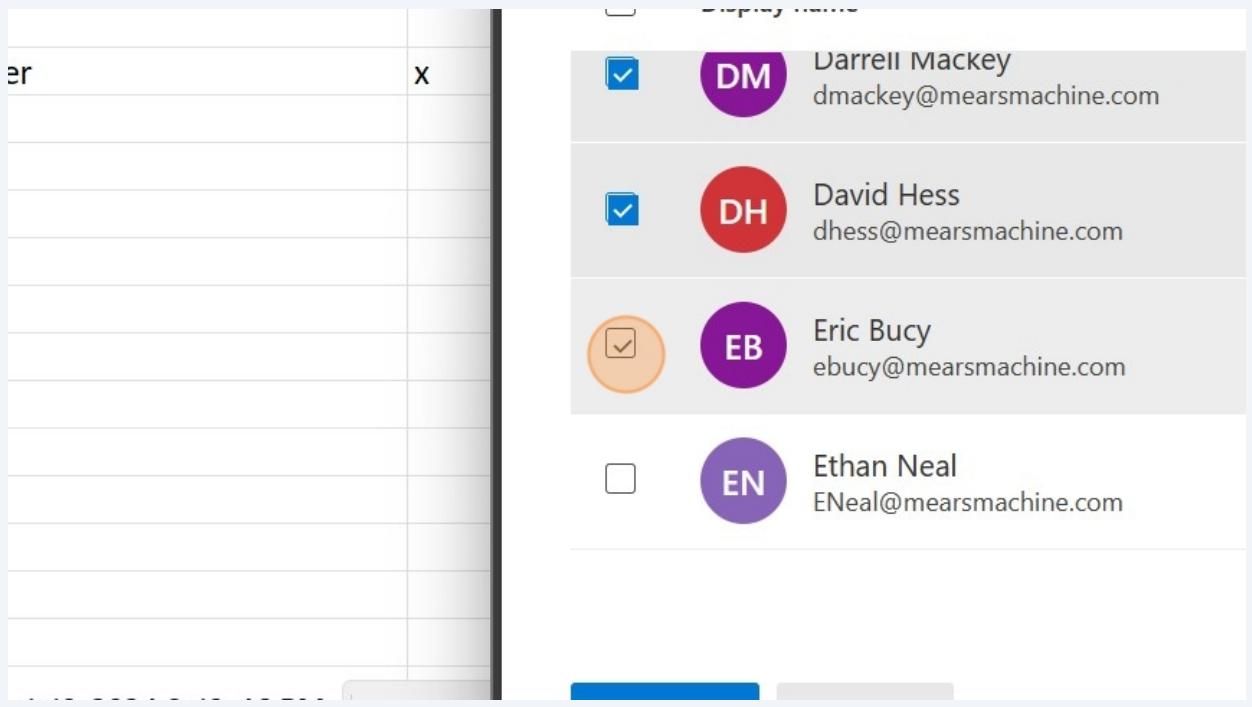
- Corey Wade (checkbox unchecked, CW icon)
- CyberCNS (checkbox unchecked, C icon)
- Darrell Mackey (checkbox checked, DM icon)
- David Hess (checkbox unchecked, DH icon)

At the bottom of the list are two buttons: "Add (3)" and "Cancel".

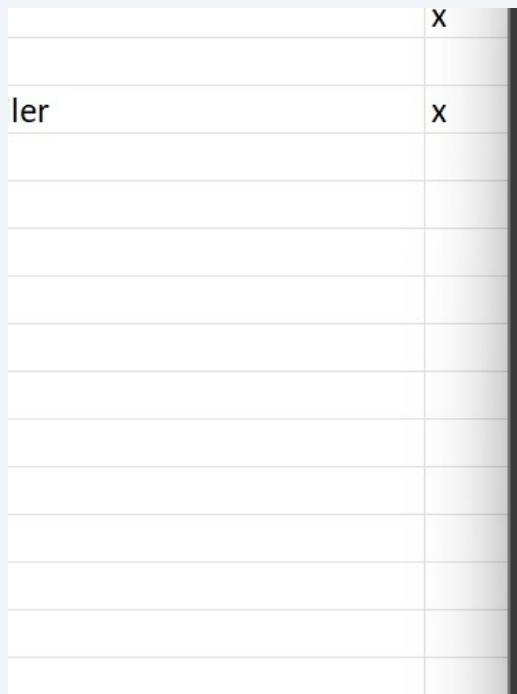
61 Click here



62 Click here

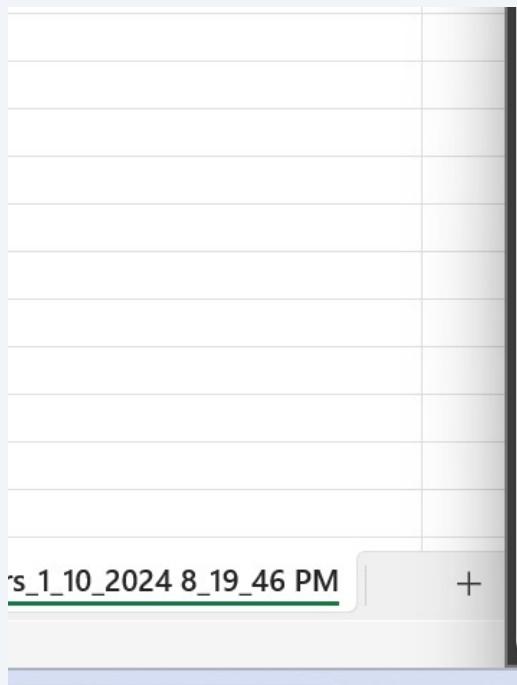


63 Click here



- Display name**
-  ebucy@mearsmachine.com
-  Ethan Neal
ENeal@mearsmachine.com
-  Freiberger
mfreiburger@mearsmachine.com
-  Gabrielle Gahwiler
ggahwiler@harrisonmanufacturing.c
-  George Cox

64 Click here



-  Freiberger
mfreiburger@mearsmachine.com
-  Gabrielle Gahwiler
ggahwiler@harrisonmanufacturing.c
-  George Cox
gcox@mearsmachine.com

Add (8) **Cancel**

65 Click here

A screenshot of a mobile application interface. On the left, there is a large, empty text input field with a placeholder 'er' and an 'X' button at the top right. Below the input field is a timestamp: s_1_10_2024 8_19_46 PM. To the right of the input field is a plus sign (+) button. At the bottom right are two buttons: a blue 'Add (9)' button and a grey 'Cancel' button. The main area contains a list of four contacts, each with a checkbox and a circular icon:

- IA** INIT Admin
initadmin@mearsmachine.com
- ID** IT Department
itdepartment@mearsmachine.com
- JF** Jake Fields
jfields@mearsmachine.com
- JC** James Cady
jcady@mearsmachine.com

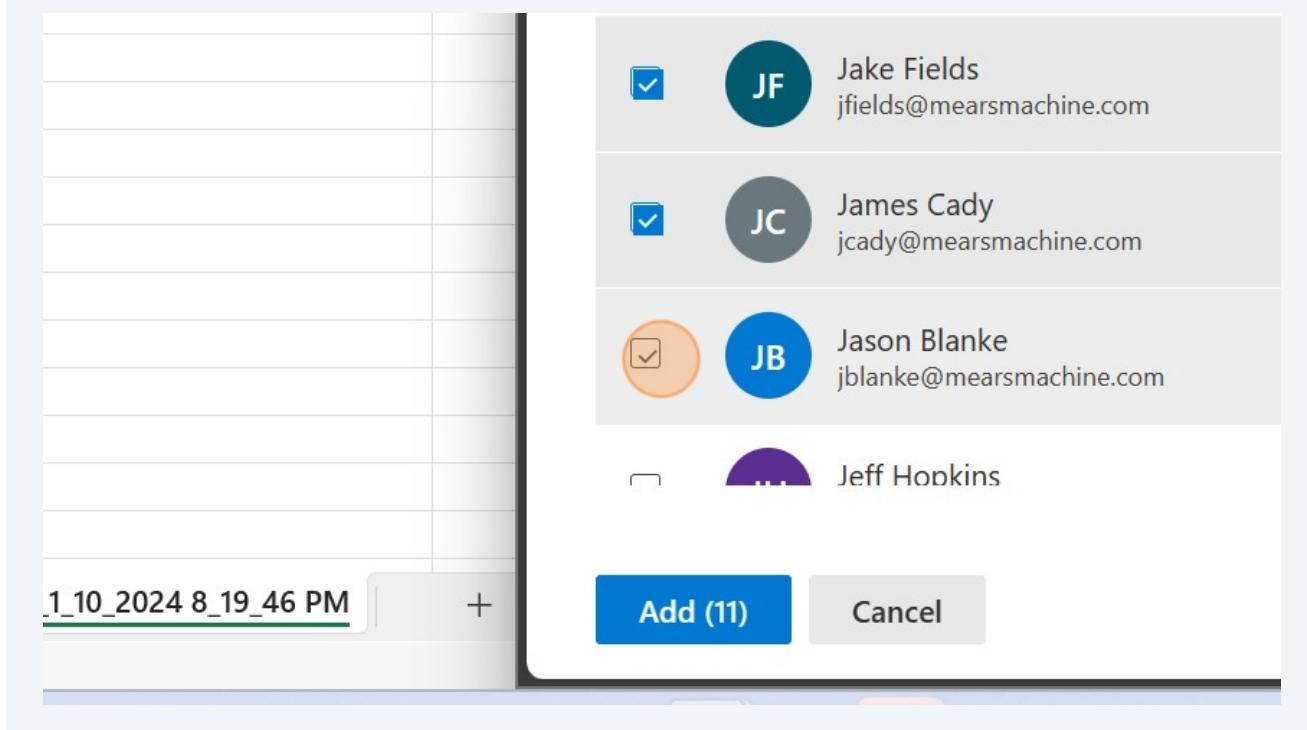
66 Click here

A screenshot of a mobile application interface, similar to the previous one. On the left, there is a large, empty text input field with a placeholder 'er' and an 'X' button at the top right. Below the input field is a timestamp: _1_10_2024 8_19_46 PM. To the right of the input field is a plus sign (+) button. At the bottom right are two buttons: a blue 'Add (10)' button and a grey 'Cancel' button. The main area contains a list of five contacts, each with a checkbox and a circular icon. The second contact, 'JF', has a checked checkbox and is highlighted with a grey background:

- ID** IT Department
itdepartment@mearsmachine.com
- JF** Jake Fields
jfields@mearsmachine.com
- JC** James Cady
jcady@mearsmachine.com
- JB** Jason Blanke
iblanke@mearsmachine.com

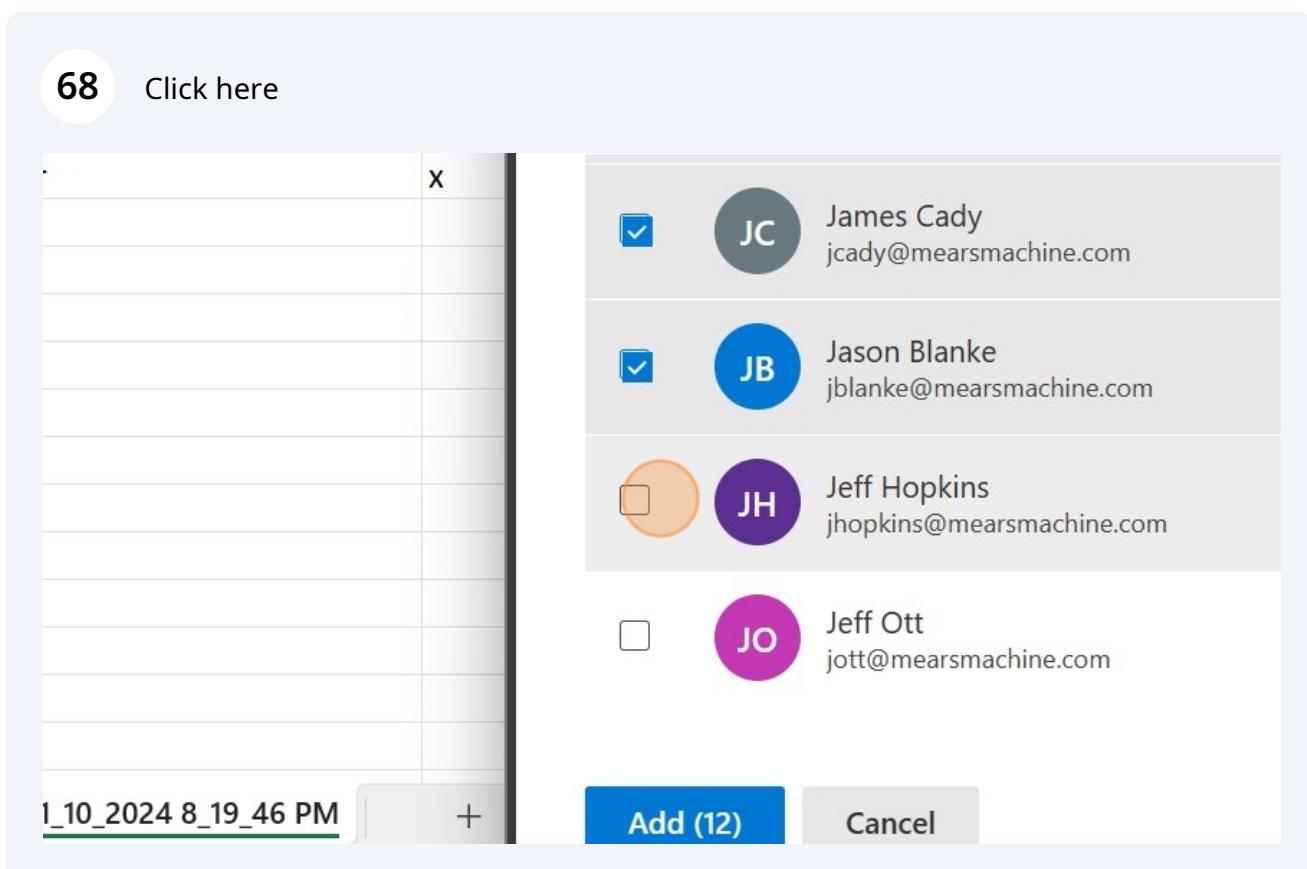
67

Click here



68

Click here



69 Click here

The screenshot shows a mobile application interface. On the left side, there is a vertical list of names: "er" and "X". On the right side, there is a list of contacts with checkboxes and icons. The contacts are as follows:

- Jason Blanke
JB jblanke@mearsmachine.com
- Jeff Hopkins
JH jhopkins@mearsmachine.com
- Jeff Ott
JO jott@mearsmachine.com
- Jenny Mears
JM jenny@mearsmachine.com
- Jesse Greene
JM jesse@mearsmachine.com

70 Click here

The screenshot shows a mobile application interface. On the left side, there is a vertical list of names: "er" and "X". On the right side, there is a list of contacts with checkboxes and icons. The contacts are as follows:

- Jeff Ott
JO jott@mearsmachine.com
- Jenny Mears
JM jenny@mearsmachine.com
- Jesse Greene
JG jgreene@mearsmachine.com
- Jonny McLain
JM jmclain@mearsmachine.com

71

[Click here](#)

- Display name**
 jolt@mearsmachine.com
- JM** Jenny Mears
jenny@mearsmachine.com
- JG** Jesse Greene
jgreene@mearsmachine.com
- JM** Jonny McLain
jmclain@mearsmachine.com
- JB** Justin Bosaw
jbosaw@mearsmachine.com

72

[Click here](#)

<input type="checkbox"/>	Display name	
<input checked="" type="checkbox"/>	JM	Jenny Mears jenny@mearsmachine.com
<input checked="" type="checkbox"/>	JG	Jesse Greene jgreene@mearsmachine.com
<input checked="" type="checkbox"/>	JM	Jonny McLain jmclain@mearsmachine.com
<input type="checkbox"/>	JB	Justin Bosaw jbosaw@mearsmachine.com
—	Kalob Dunham	

73 Click here

A screenshot of a mobile application interface. On the left, there is a large, light gray area with horizontal lines resembling a notepad or list. At the bottom of this area, the text "1 10 2024 8 19 46 PM" is displayed. To the right of this is a vertical black bar. To the right of the bar is a list of four contacts, each with a circular icon containing initials and a checkmark or not. The contacts are:

- Jesse Greene (checkmark, purple circle) - jgreene@mearsmachine.com
- Jonny McLain (checkmark, dark red circle) - jmclain@mearsmachine.com
- Justin Bosaw (empty circle, orange circle) - jbosaw@mearsmachine.com
- Kaleb Dunham (empty circle, brown circle) - kaleb.dunham@harrisonmanufacturing

At the bottom right of the screen are two buttons: "Add (17)" in blue and "Cancel" in gray.

74 Click here

A screenshot of a mobile application interface, similar to the one above. On the left, there is a large, light gray area with horizontal lines. At the bottom of this area, the text "1_10_2024 8_19_46 PM" is displayed. To the right of this is a vertical black bar. To the right of the bar is a list of five contacts, each with a circular icon containing initials and a checkmark or not. The contacts are:

- Jonny McLain (checkmark, dark red circle) - jmclain@mearsmachine.com
- Justin Bosaw (checkmark, dark red circle) - jbosaw@mearsmachine.com
- Kaleb Dunham (checkmark, orange circle) - kaleb.dunham@harrisonmanufacturing
- Ken Clodfelter (empty circle, dark gray circle) - kcldofelter@mearsmachine.com

At the bottom right of the screen are two buttons: "Add (18)" in blue and "Cancel" in gray.

75 Click here

A screenshot of a Microsoft Teams search interface. On the left is a note-taking area with a timestamp: 's_1_10_2024 8_19_46 PM'. To its right is a search bar with the placeholder 'Search' and a '+' button. A blue 'Add (19)' button is positioned above a 'Cancel' button. Below the search bar is a horizontal toolbar with icons for various Microsoft applications: Outlook, Photos, Teams, OneDrive, Edge, File Explorer, Task View, Microsoft Teams (highlighted with a green checkmark), Excel, Word, and Power BI.

The main area displays a list of contacts:

- Justin Bosaw
jbosaw@mearsmachine.com
- Kaleb Dunham
kaleb.dunham@harrisonmanufacturi
- Ken Clodfelter
kclodfelter@mearsmachine.com

76 Click here

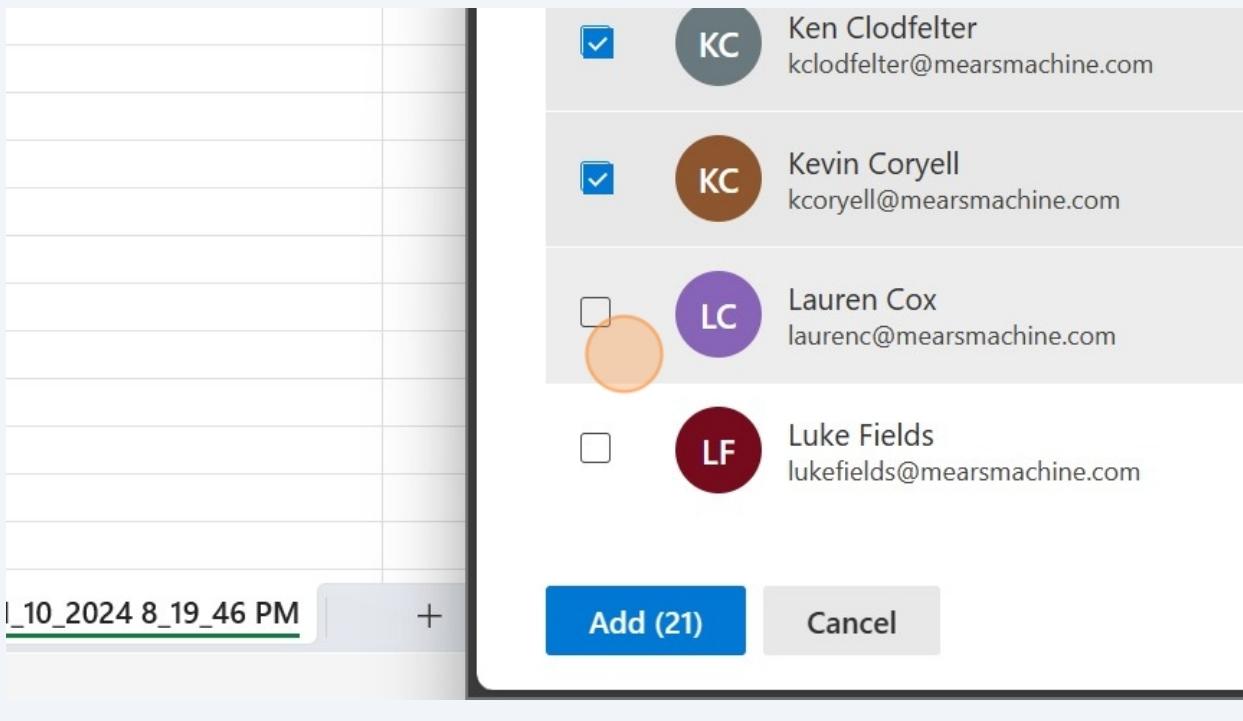
A screenshot of a Microsoft Teams search interface, similar to the one above. It features a note-taking area on the left and a search bar with a placeholder 'Search' and a '+' button. A blue 'Add (19)' button is above a 'Cancel' button. Below the search bar is a horizontal toolbar with the same set of Microsoft application icons.

The main area displays a list of contacts, each preceded by a checkbox:

- KC Ken Clodfelter
kclodfelter@mearsmachine.com
- KC Kevin Coryell
kcoryell@mearsmachine.com
- LC Lauren Cox
laurenc@mearsmachine.com
- LF Luke Fields
lukefields@mearsmachine.com

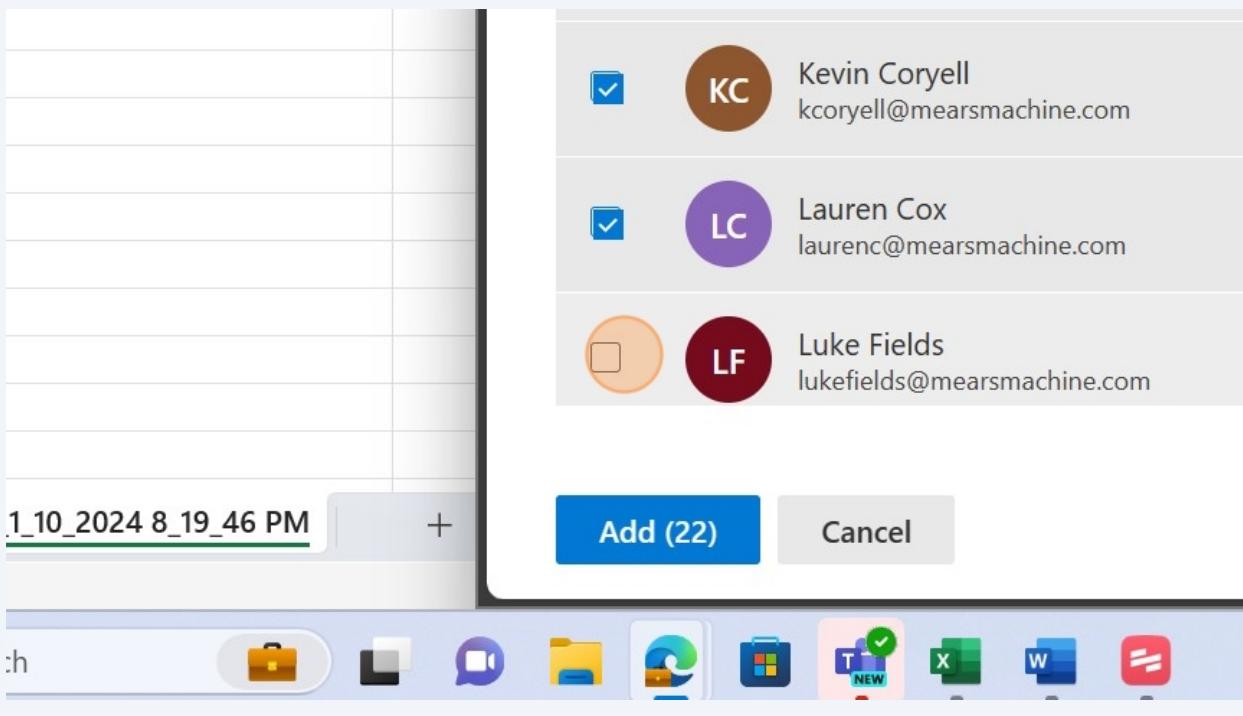
77

Click here

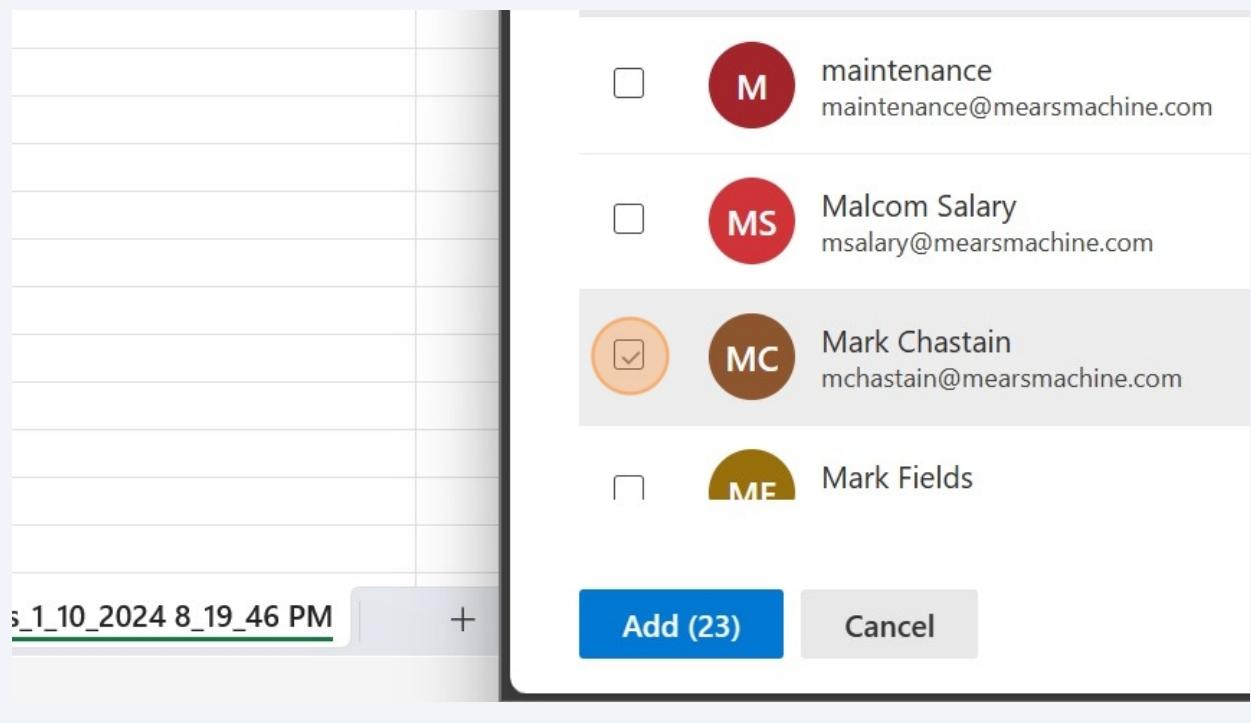


78

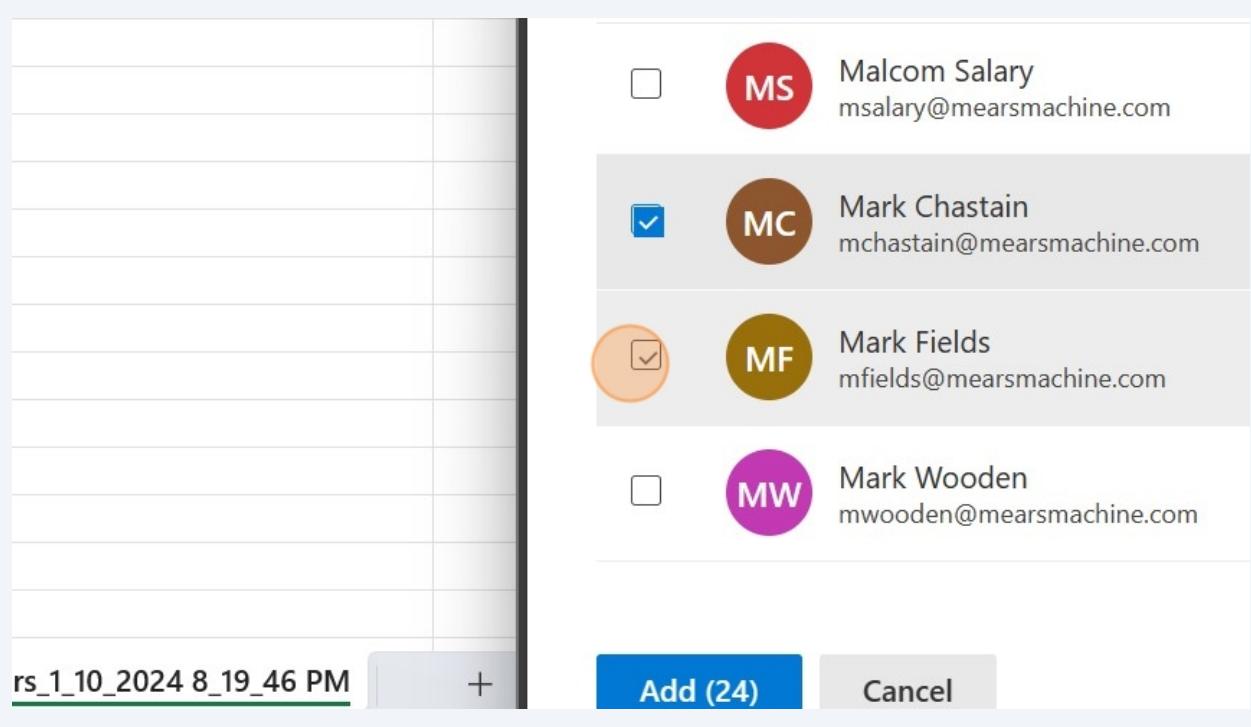
Click here



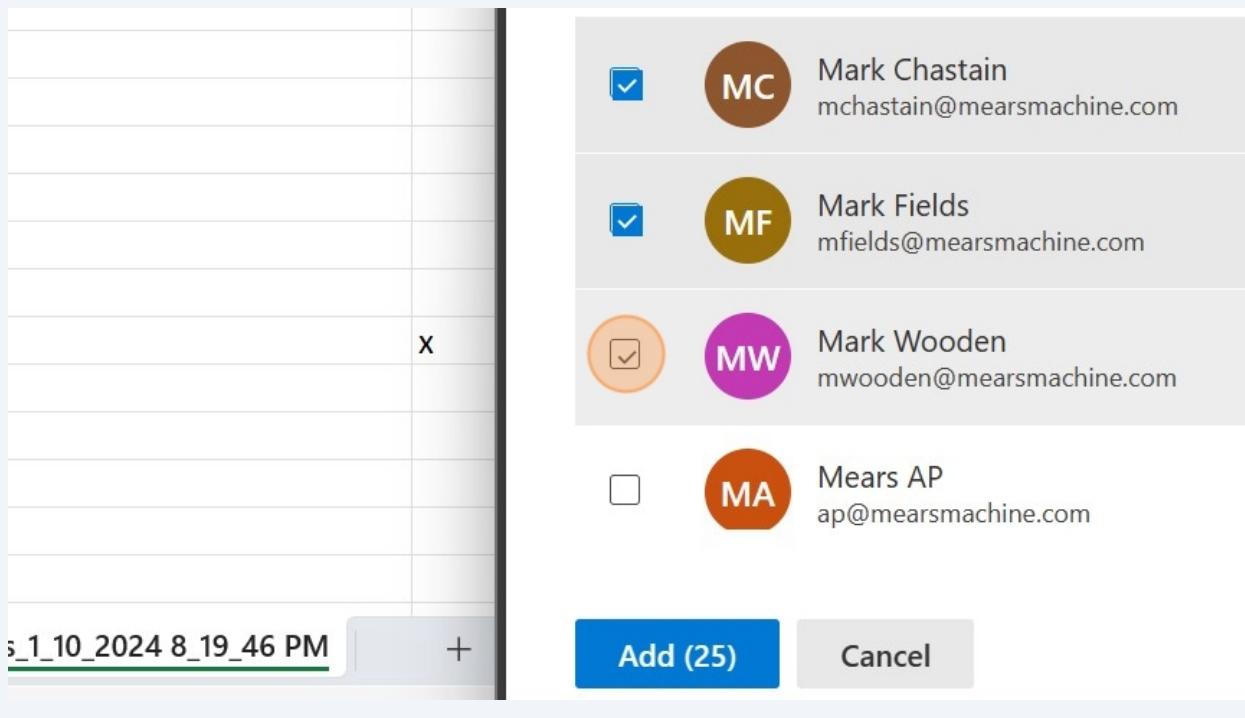
79 Click here



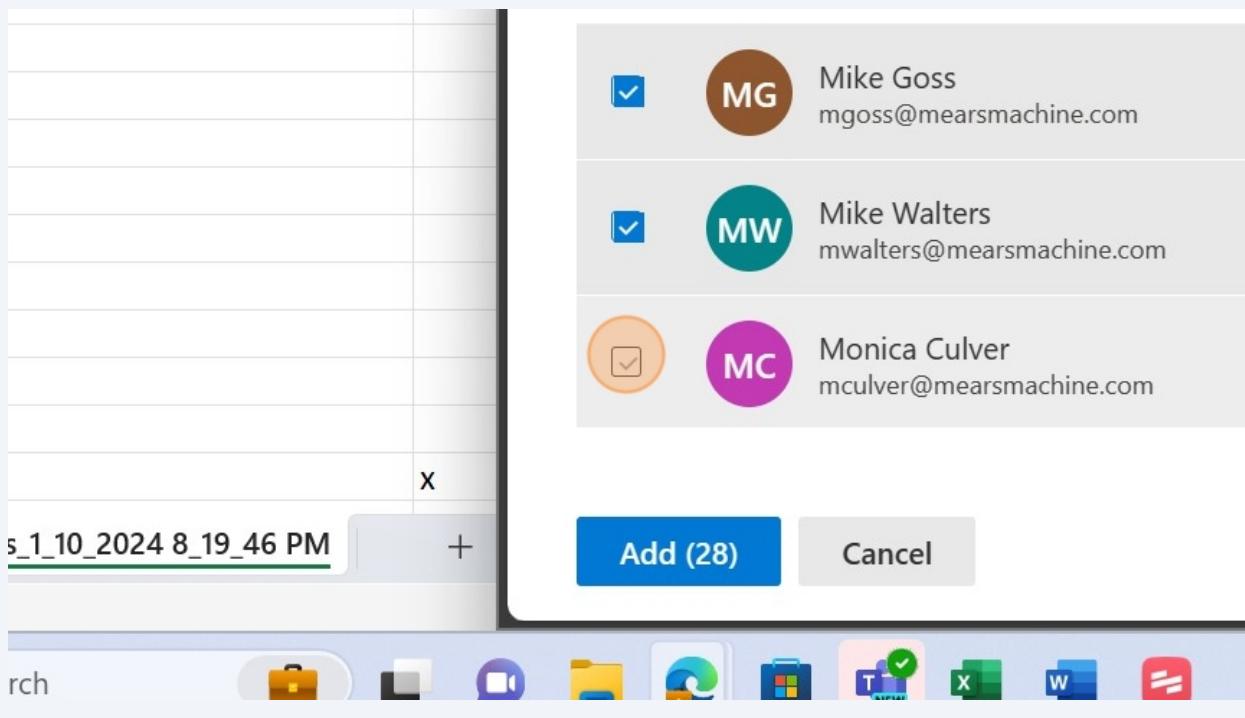
80 Click here



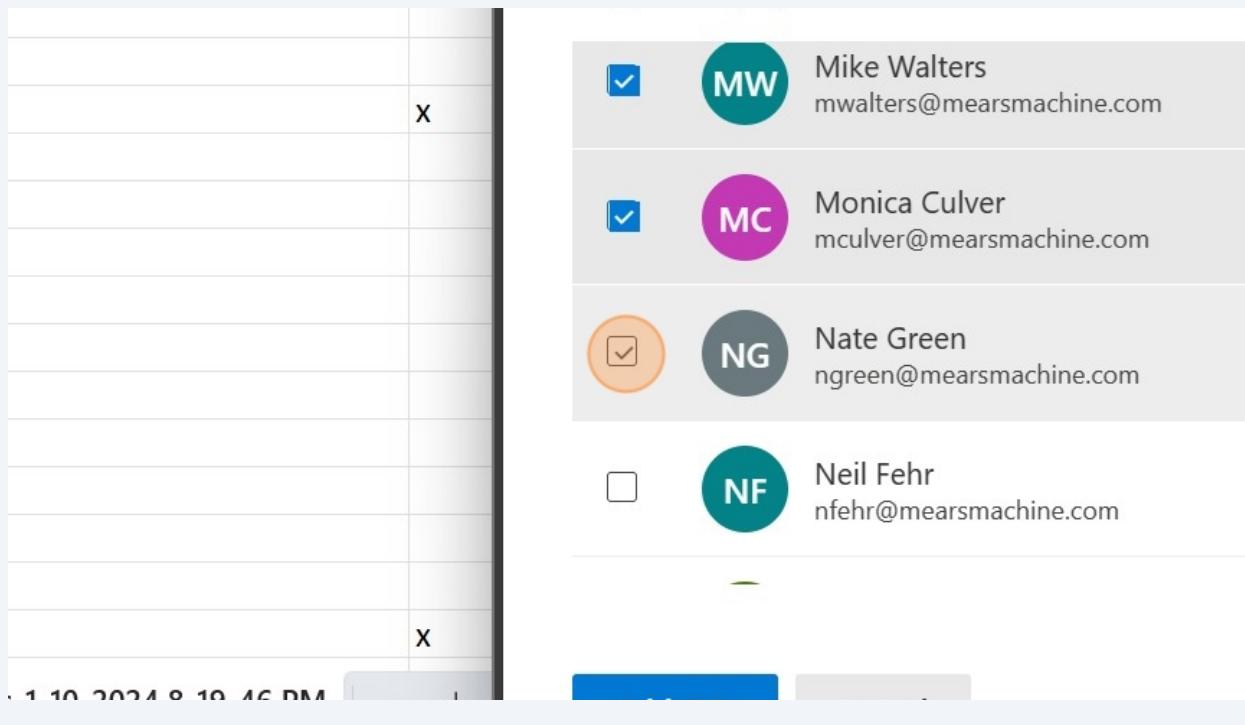
81 Click here



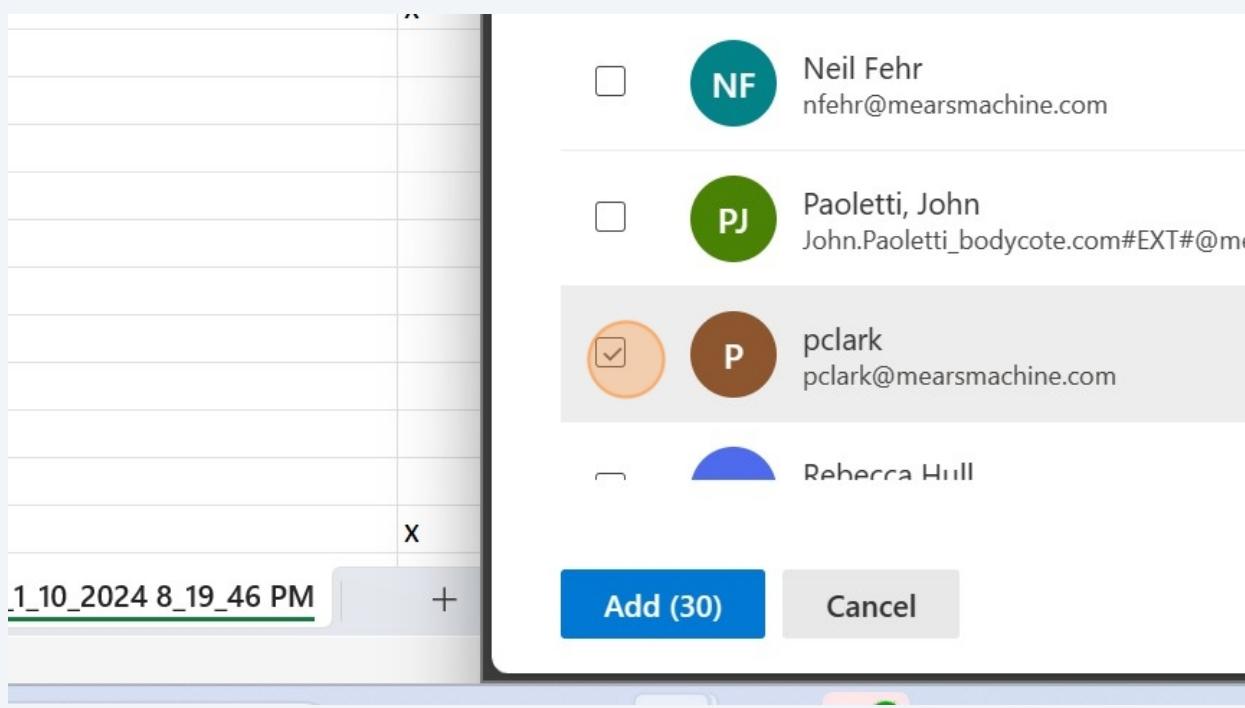
82 Click "Select group member"



83 Click here



84 Click here



85 Click here

A screenshot of a mobile application interface showing a list of contacts for selection. On the left, there is a vertical list of names with an 'X' icon at the top of each entry. The first entry is 'pc Clark' with a checked checkbox and a brown circular icon containing a white 'P'. The second entry is 'Rebecca Hull' with an unchecked checkbox and a blue circular icon containing a white 'RH'. The third entry is 'Rick Perry' with a checked checkbox and an orange circular icon containing a white 'RP'. The fourth entry is 'riley demeter' with an unchecked checkbox and a red circular icon containing a white 'RD'. At the bottom of the list are two buttons: 'Add (31)' in blue and 'Cancel' in grey.

pc Clark
pcClark@mearsmachine.com

Rebecca Hull
rhull@hmith.com

Rick Perry
rperry@mearsmachine.com

riley demeter
rdemeter@hmith.com

Add (31) Cancel

86 Click here

A screenshot of a mobile application interface showing a list of contacts. On the left, there is a vertical list of names with an 'X' icon at the top of each entry. The first entry is 'Display name' with an unchecked checkbox and a blue circular icon. The second entry is 'riley demeter' with an unchecked checkbox and a red circular icon containing a white 'RD'. The third entry is 'Roger Mears' with an unchecked checkbox and an orange circular icon containing a white 'RM'. The fourth entry is 'Roger Mears' with an unchecked checkbox and a green circular icon containing a white 'RM'. The fifth entry is 'Roger Pablo' with an unchecked checkbox and a blue circular icon containing a white 'RP'. At the bottom of the list are three dots indicating more entries.

Display name
rperry@mearsmachine.com

riley demeter
rdemeter@hmith.com

Roger Mears
rogermears@mearsmachine.com

Roger Mears
rmeairs@mearsmachine.com

Roger Pablo

87

Click here

A screenshot of a mobile application interface showing a list of contacts for selection. The contacts are listed in a scrollable list with a light gray background. Each contact entry includes a small circular icon with initials (RD, RM, RM, RP), a name, and an email address. To the left of each contact is a small square checkbox. At the bottom of the list are two buttons: a blue "Add (33)" button and a gray "Cancel" button. On the far left, there is a vertical column with a large "X" at the top and a date and time stamp "2024 8_19_46 PM" followed by a plus sign. A thin vertical black bar separates this column from the main contact list.

<input type="checkbox"/>	RD	riley demeter rdemeter@hmith.com
<input checked="" type="checkbox"/>	RM	Roger Mears rogermears@mearsmachine.com
<input checked="" type="checkbox"/>	RM	Roger Mears rmears@mearsmachine.com
<input type="checkbox"/>	RP	Roger Pablo

2024 8_19_46 PM + Add (33) Cancel

88

Click here

A screenshot of a mobile application interface showing a list of contacts for selection. The contacts are listed in a scrollable list with a light gray background. Each contact entry includes a small circular icon with initials (SJ, SH, SE), a name, and an email address. To the left of each contact is a small square checkbox. At the bottom of the list are two buttons: a blue "Add (34)" button and a gray "Cancel" button. On the far left, there is a vertical column with a large "X" at the top and a date and time stamp "2024 8_19_46 PM" followed by a plus sign. A thin vertical black bar separates this column from the main contact list.

<input type="checkbox"/>	SJ	Sajka, Raymond J. (GRC-H000)[H raymond.j.sajka_nasa.gov#EXT#@mea
<input type="checkbox"/>	SH	Sam Hull Sam.Hull@harrisonmanufacturing.con
<input checked="" type="checkbox"/>	SE	Sam Elliott sell Elliott@mearsmachine.com

2024 8_19_46 PM + Add (34) Cancel

rch

89 Click here

A screenshot of a mobile application interface. On the left, there is a vertical list of names and descriptions, some preceded by an 'X' and followed by a checkmark. The list includes "GRC-H000)[HX5 Sierra]" and ". (GRC-H000)[HX5 Sierra]". On the right, a modal window displays a list of users with circular icons containing initials. The first user, "Sam Elliott" (SE), has a checked checkbox and is highlighted in purple. The second user, "Samantha Runyan" (SR), has an unchecked checkbox and is highlighted in grey. The third user, "terry helton" (TH), has a checked checkbox and is highlighted in orange. The fourth user, "Test User" (TU), has an unchecked checkbox and is highlighted in green. At the bottom of the modal are "Add (35)" and "Cancel" buttons.

GRC-H000)[HX5 Sierra]
. (GRC-H000)[HX5 Sierra]

Sam Elliott
sellio@mearsmachine.com

Samantha Runyan
samantha.runyan@harrisonmanufactu

terry helton
thelton@mearsmachine.com

Test User
TestUser@mearsmachine.com

10_10_2024 8_19_46 PM + Add (35) Cancel

90 Click here

A screenshot of a mobile application interface, similar to the one above. On the left, there is a vertical list of names and descriptions, some preceded by an 'X' and followed by a checkmark. The list includes "GRC-H000)[HX5 Sierra]" and ". (GRC-H000)[HX5 Sierra]". On the right, a modal window displays a list of users with circular icons containing initials. The first user, "terry helton" (TH), has a checked checkbox and is highlighted in teal. The second user, "Test User" (TU), has an unchecked checkbox and is highlighted in green. The third user, "Travis Knauer" (TK), has a checked checkbox and is highlighted in orange. The fourth user, "Travis Smith" (TS), has an unchecked checkbox and is highlighted in brown. At the bottom of the modal is a blue "Add" button.

GRC-H000)[HX5 Sierra]
. (GRC-H000)[HX5 Sierra]

terry helton
thelton@mearsmachine.com

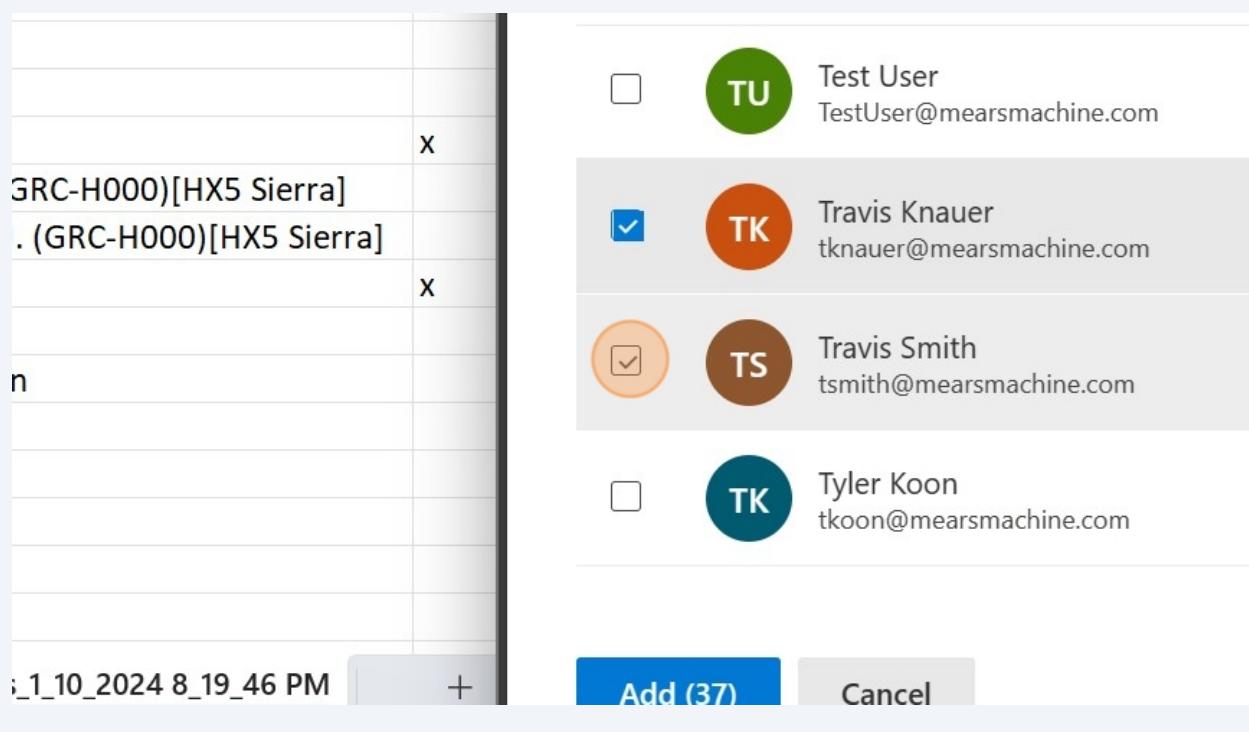
Test User
TestUser@mearsmachine.com

Travis Knauer
tknauer@mearsmachine.com

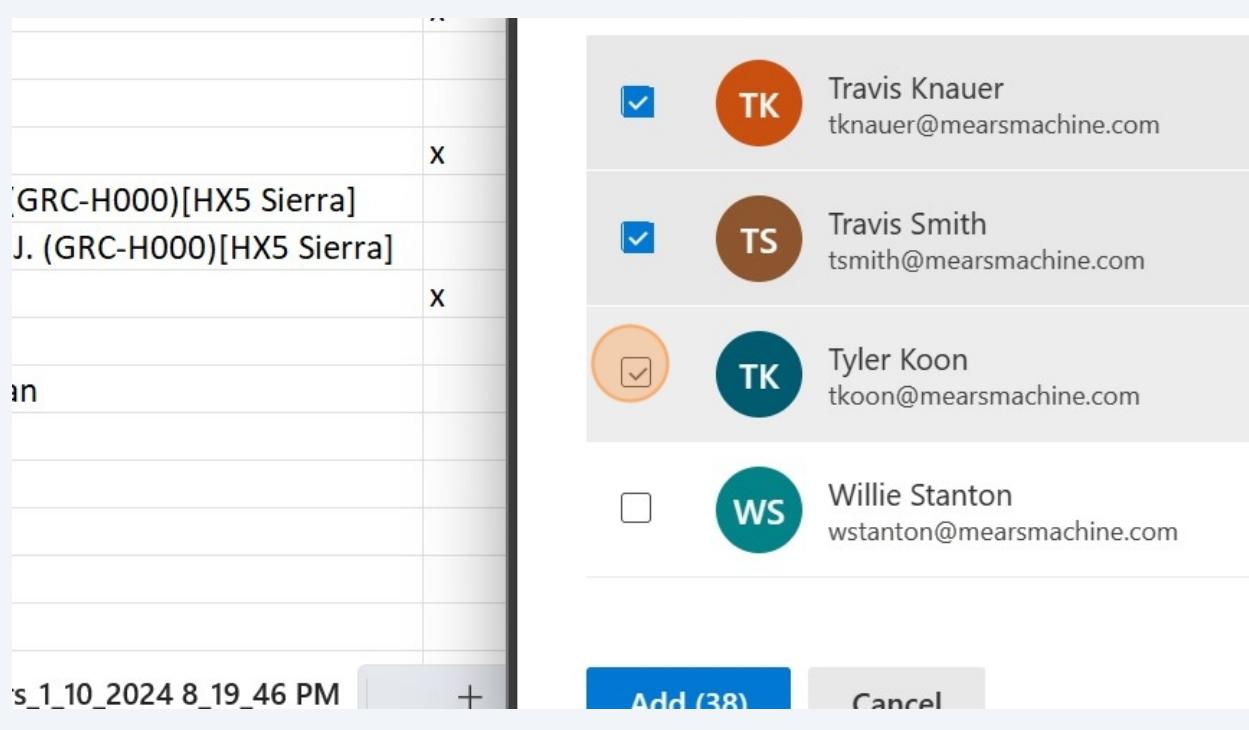
Travis Smith
tsmith@mearsmachine.com

Add

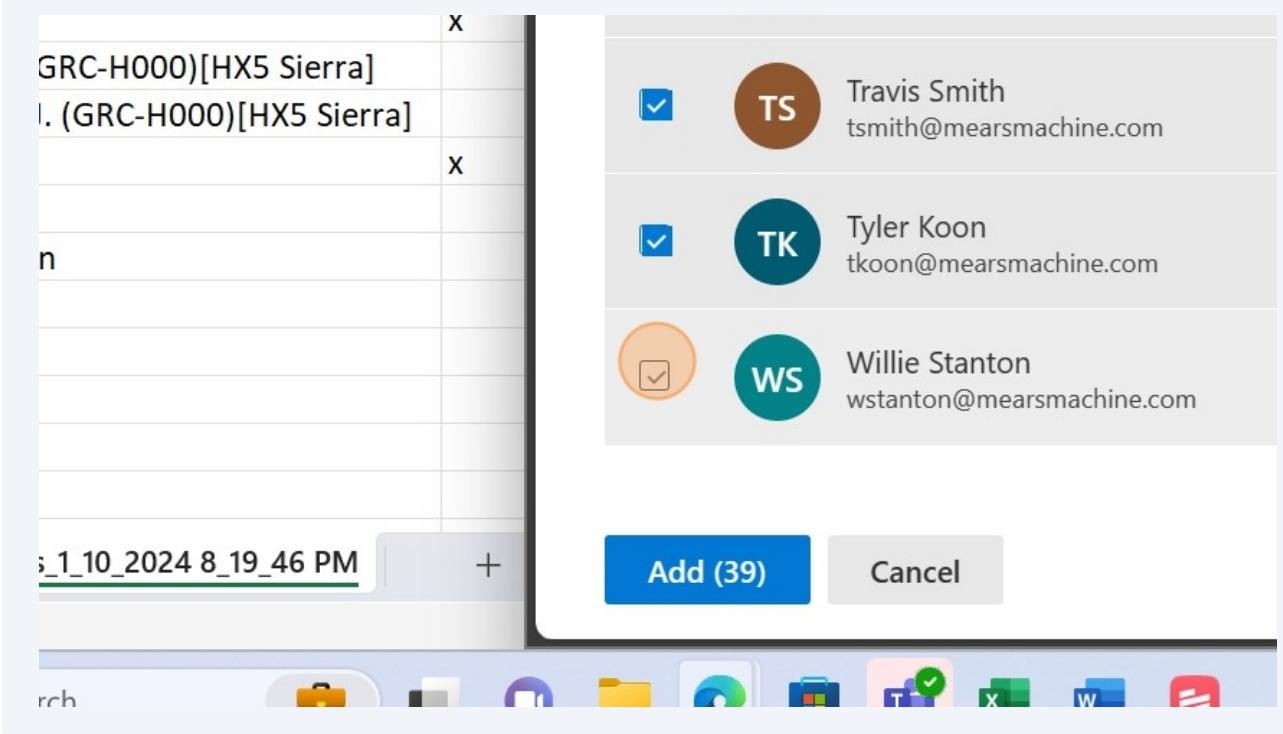
91 Click here



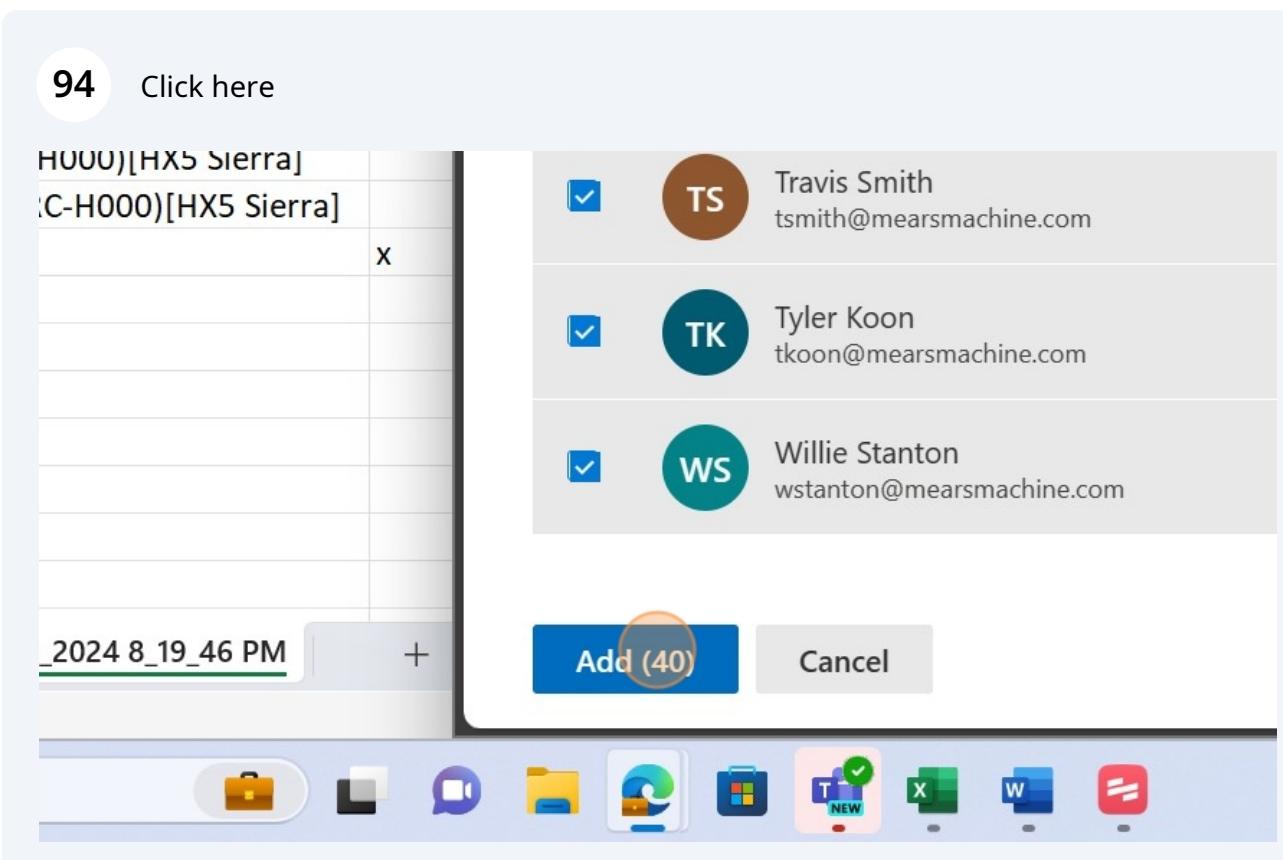
92 Click "Select group member"



93 Click here



94 Click here



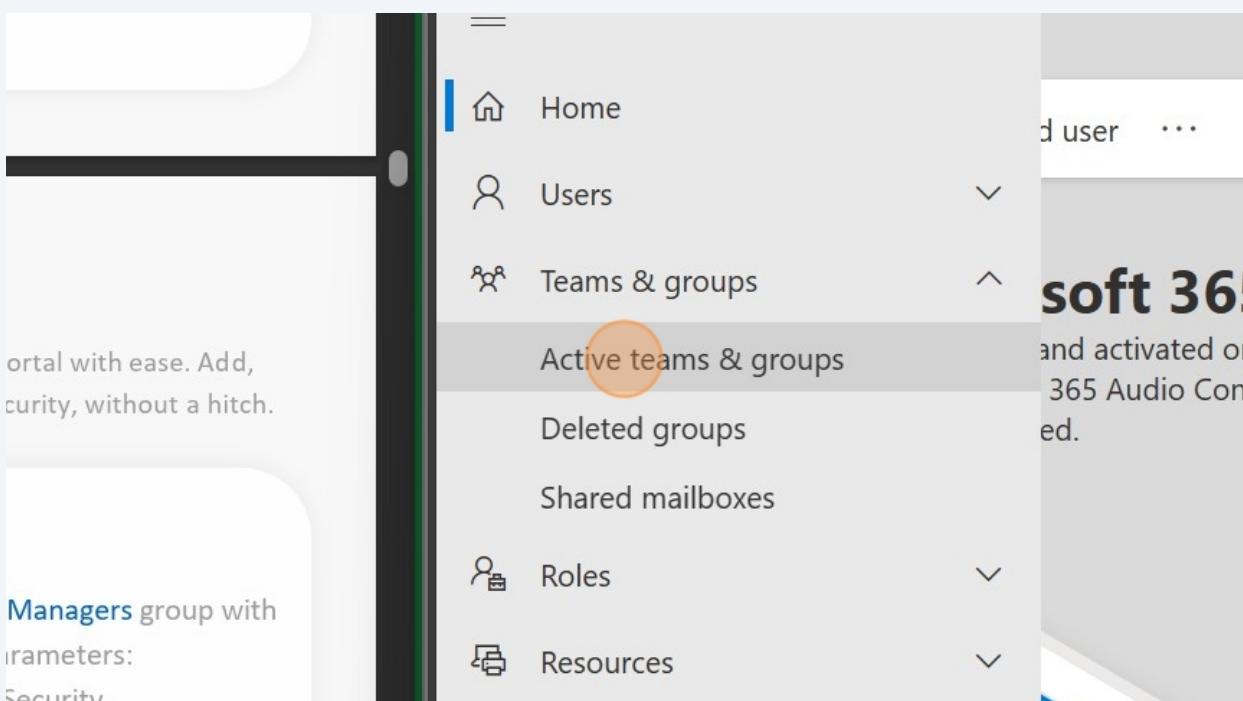
95 Click here

The screenshot shows a Microsoft Edge browser window with the Microsoft 365 admin center loaded. In the top right corner of the main content area, there is a three-dot menu icon. A callout bubble with the number '95' and the text 'Click here' points to this icon. The rest of the screen displays various administrative settings and a promotional message about installing Skype for Business.

96 Click here

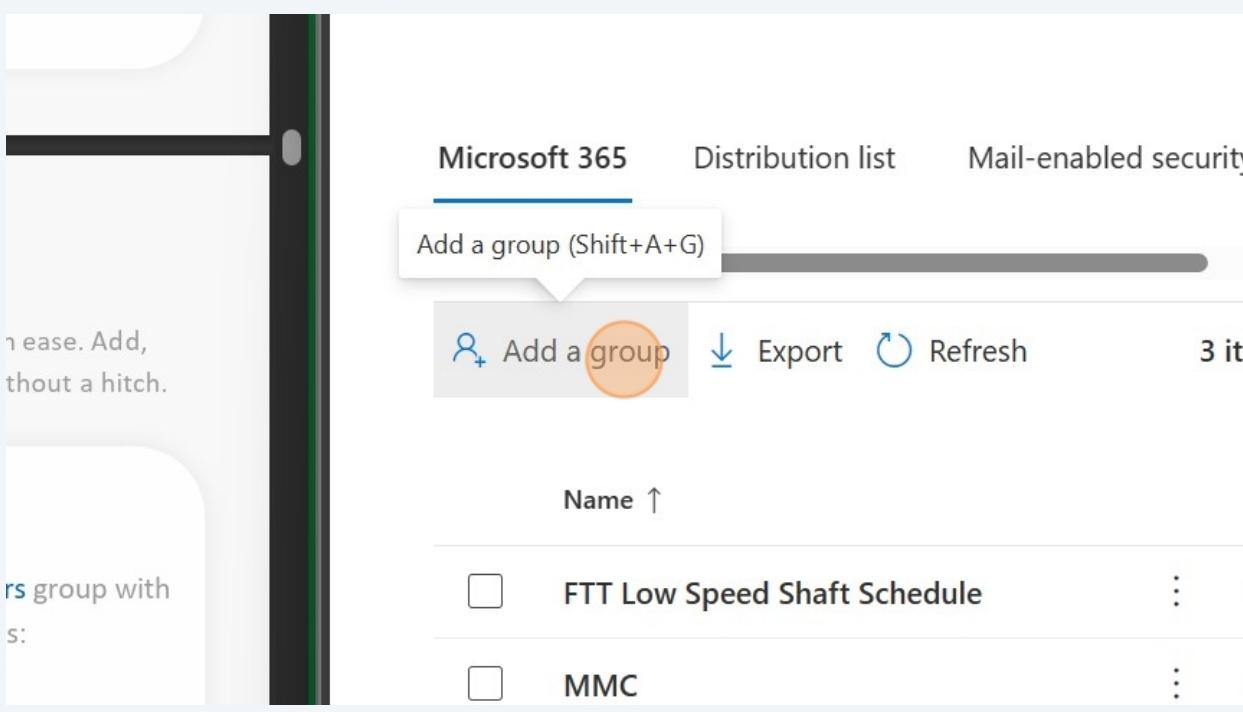
The screenshot shows the Microsoft 365 admin center navigation menu. The 'Teams & groups' item in the list is highlighted with a callout bubble containing the number '96' and the text 'Click here'. The menu also includes options for Home, Users, Roles, Resources, Billing, and Settings.

97 Click here



Managers group with
parameters:
Security

98 Click here



rs group with
s:

99 Click here

Managers group with
meters:
Security
SN-Managers
on: PII/PHI Protect

: group. All managers
employee account.
PartnerAdmins
Security
SN-PartnerAdmins
on: PII/PHI Protect

Creates an email address for a group of people.

Mail-enabled security

A distribution list that can also be used to control access to SharePoint.

Security

Controls access to OneDrive and SharePoint and can be used with Management for Microsoft 365.

100 Click here

BSN-Managers group with
g parameters:
ope: Security
ame: BSN-Managers
escription: PII/PHI Protect
Role
to the group. All managers
an employee account.
BSN-PartnerAdmins
ope: Security
ame: BSN-PartnerAdmins
escription: PII/PHI Protect

Security

Controls access to OneDrive and SharePoint and can be used with Management for Microsoft 365.

Next

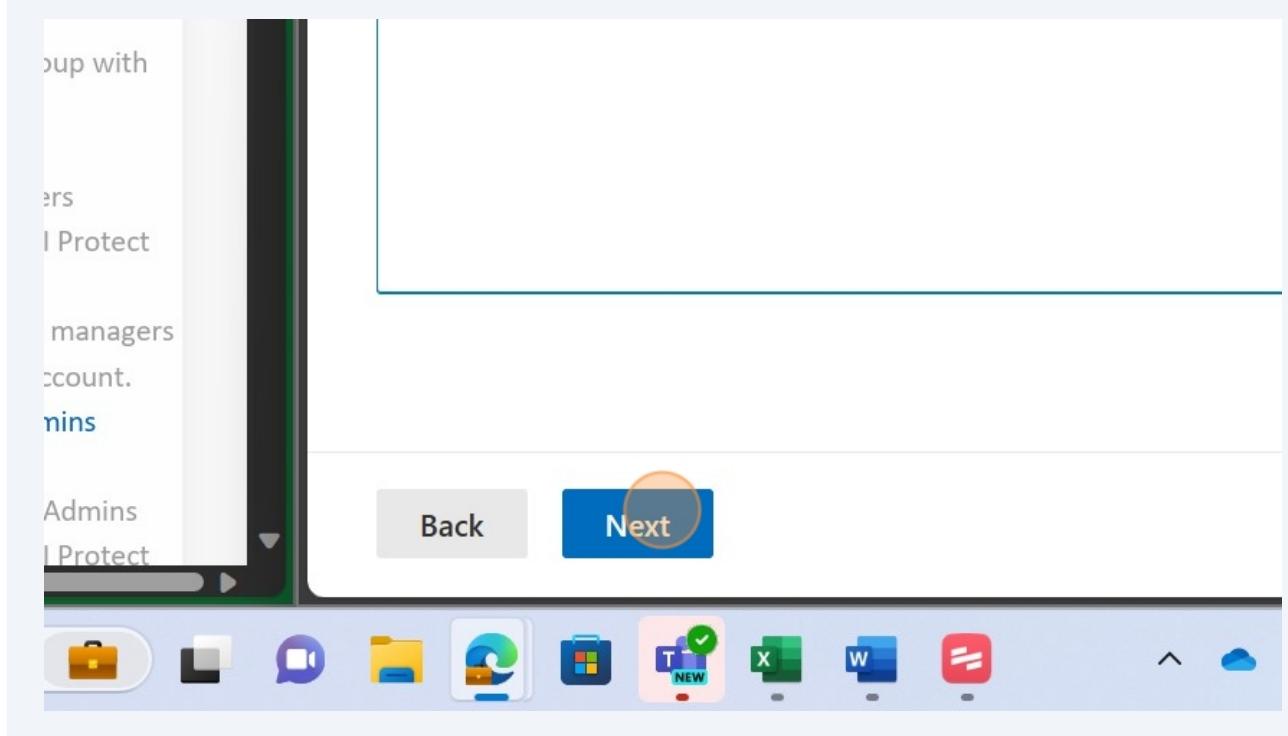
101 Click here

The screenshot shows a user interface for creating a new group. At the top, there's a header with three horizontal lines and the word 'Basics'. Below it is a sub-instruction: 'To get started, fill out some basic info about the group you'd like to create.' The main form area starts with a 'Name *' field containing 'New group', which is highlighted with an orange circle. Below this is a 'Description' field with the placeholder 'Enter a description for your new group'.

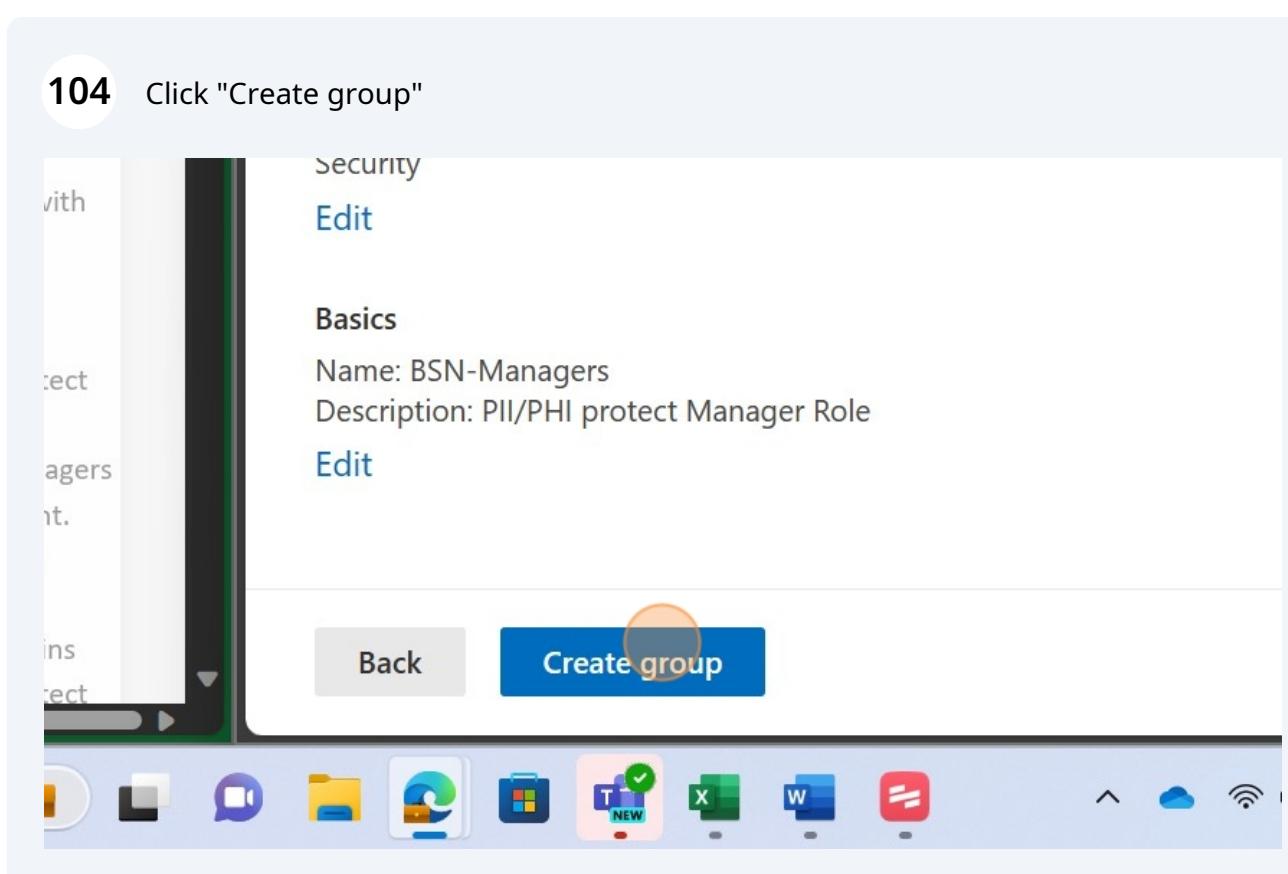
102 Click here

This screenshot shows the same group creation interface as the previous one, but with a different state. The 'Name *' field now contains the text 'BSN-Managers', which is also highlighted with an orange circle. The 'Description' field remains empty with its placeholder text.

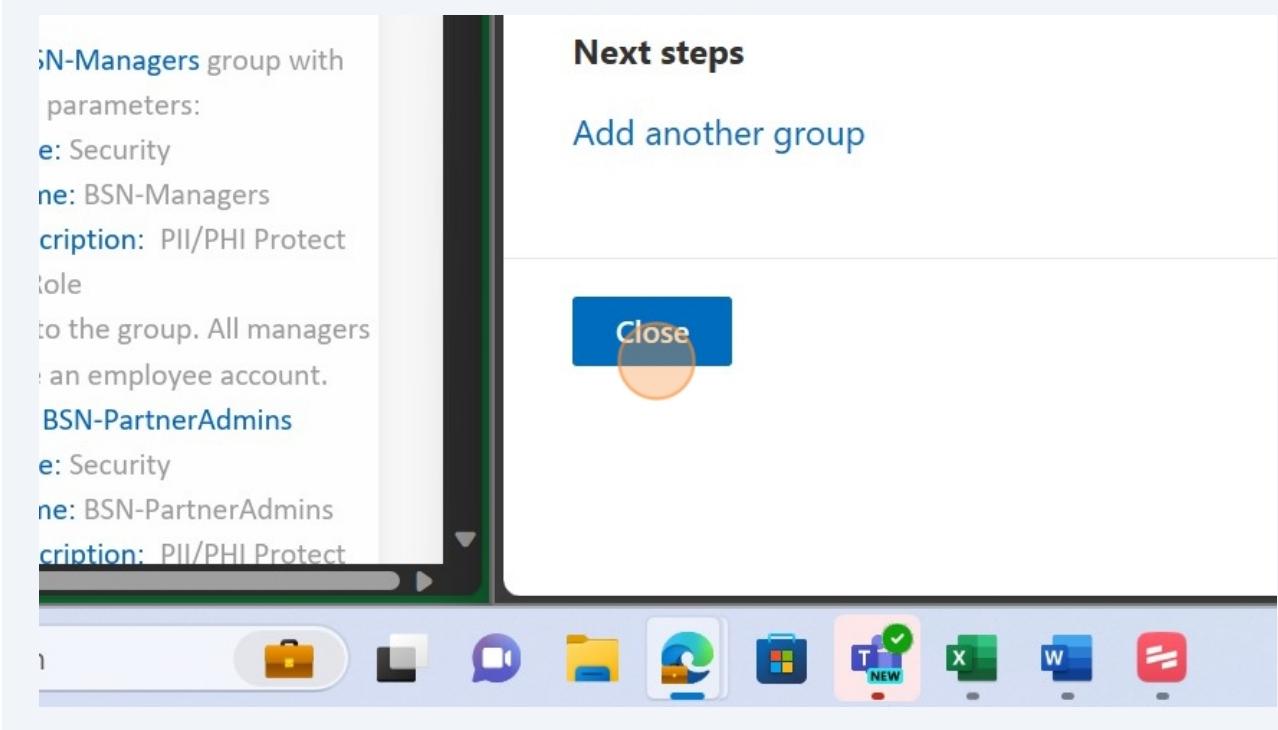
103 Click here



104 Click "Create group"



105 Click here



106 Click here

A screenshot of the Microsoft 365 Groups page. At the top, there are links for 'About Groups', 'Using Teams And SharePoint', and 'Where to'. Below that, there's a search bar with a magnifying glass icon and a 'Security' button. The main area shows a list of groups: 'Microsoft 365' (selected), 'Distribution list', and 'Mail-enabled security'. At the bottom, there are buttons for 'Add a group', 'Export', 'Refresh', '3 items', 'Filter', and a settings icon. A search bar at the very bottom allows filtering by 'Name' or 'Email'.

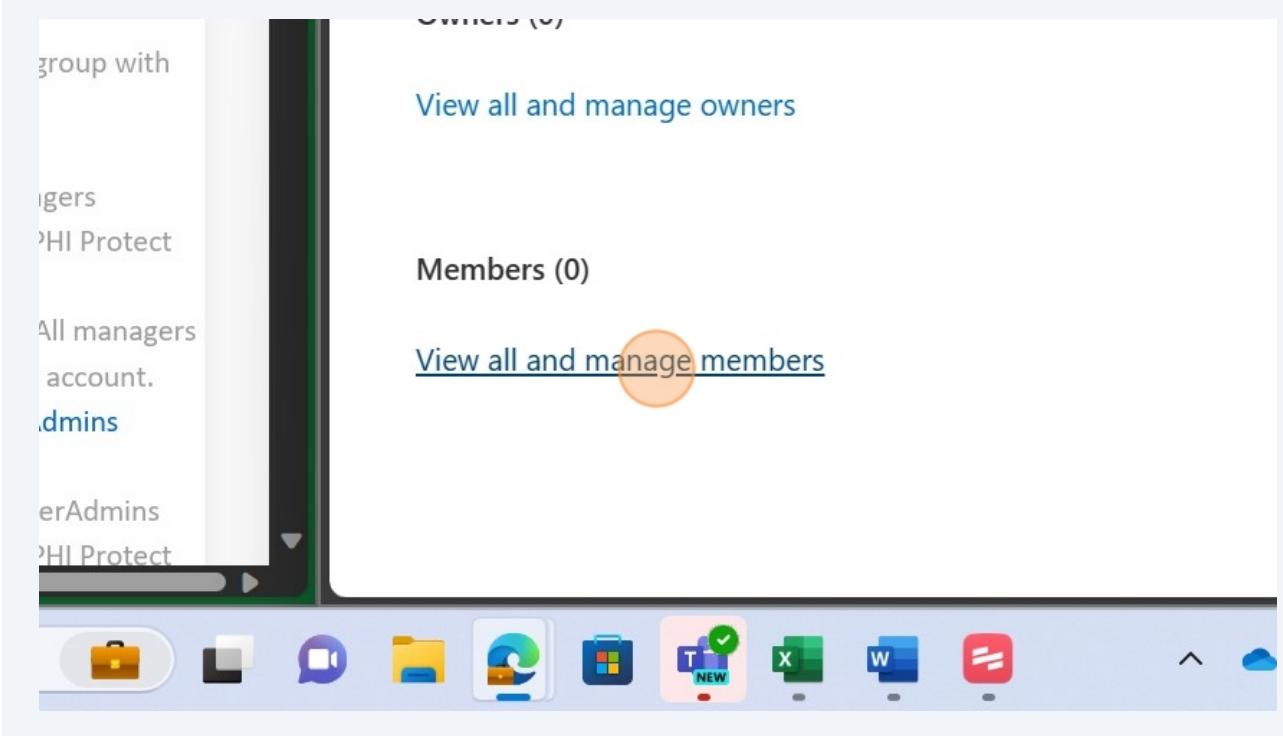
107 Click here

A screenshot of a web-based application interface. At the top, there are three buttons: 'Add a group' (with a plus sign), 'Export' (with a downward arrow), and 'Refresh' (with a circular arrow). To the left, there is a vertical sidebar with some partially visible text: 'Add, hitch.', 'with', 'protect', 'managers', 'ount.', and 'is'. The main area displays a table with two rows. The first row contains a checkbox, the name 'BSN-Employees', and a 'Sync state' column with a cloud icon. The second row, which is highlighted with a light gray background and has its entire row bordered by a thin orange circle, contains a checkbox, the name 'BSN-Managers', and a 'Sync state' column with a cloud icon. The table has a header row with the text 'Name ↑'.

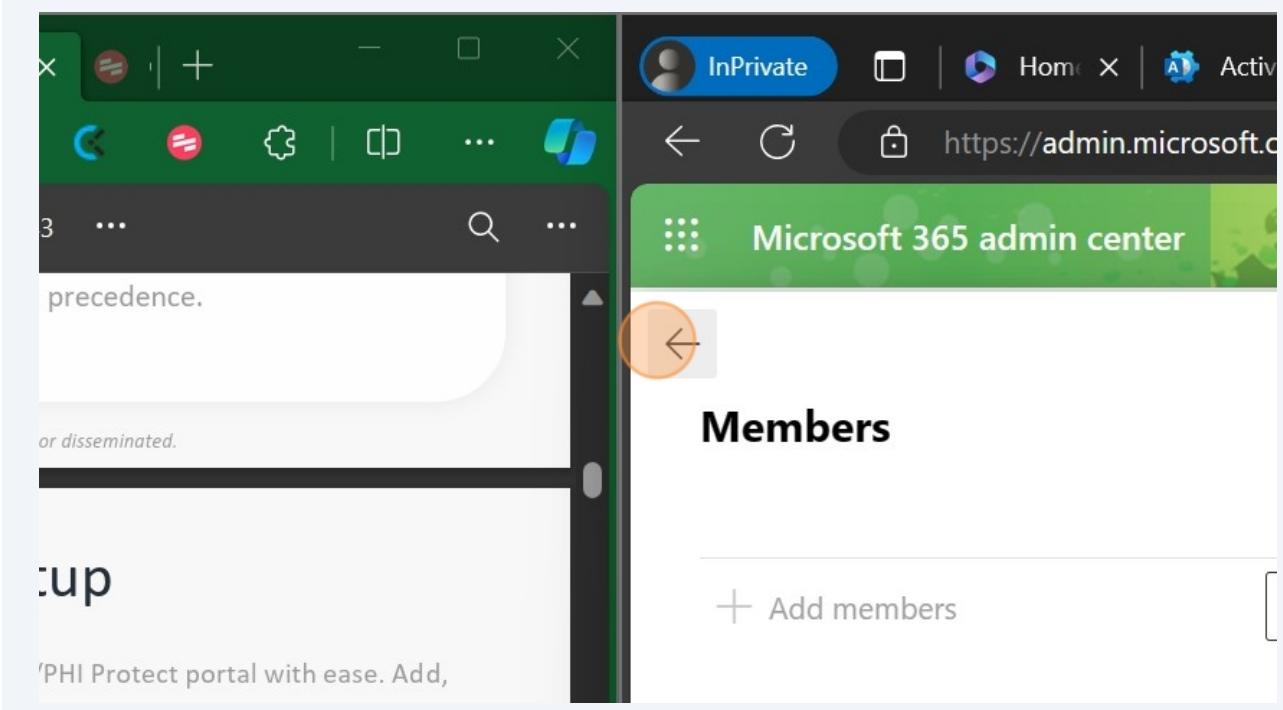
108 Click here

A screenshot of a web-based application interface showing the details of a security group named 'BSN-Managers'. The group is identified by a large blue circle containing a white letter 'B'. To the right of the circle, the text 'BSN-Managers' is displayed in bold, followed by 'Security group • 0 owners • 0 members'. Below this, there is a small trash can icon. Underneath the group name, there are two tabs: 'General' (which is underlined in blue) and 'Members' (which is highlighted with a thin orange circle). A callout message at the bottom left says, 'ⓘ This group has no owners assigned to manage group members and gro...', with a button labeled 'Add group owners' below it. To the left of the main content, there is a vertical sidebar with some partially visible text: 'e. Add, t a hitch.', 'oup with', and 'ers'.

109 Click here



110 Click here



111 Click here

with ease. Add, without a hitch.

gers group with
ters:
ty
Managers
PII/PHI Protect
cup. All managers
loyee account.
tnerAdmins

General **Members**

Owners (0)

[View all and manage owners](#)

Members (0)

[View all and manage members](#)

112 Click here

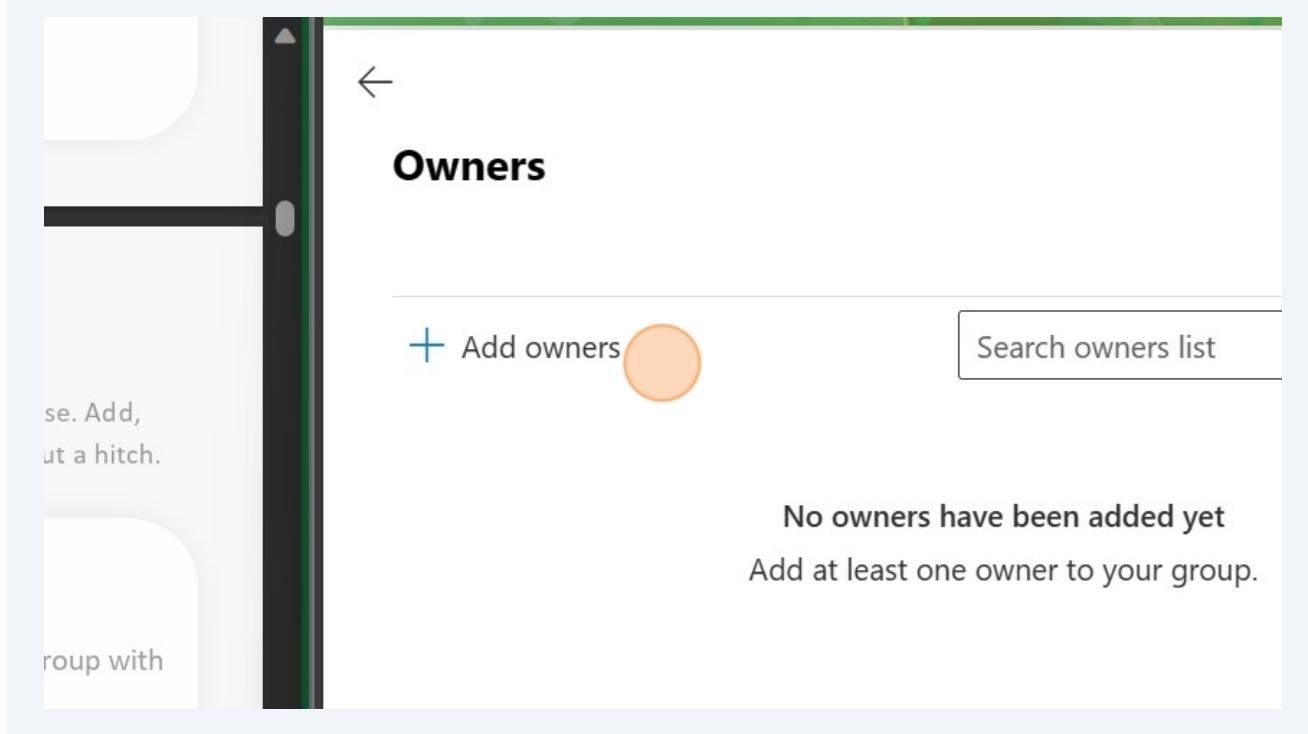
Owners

Add owners

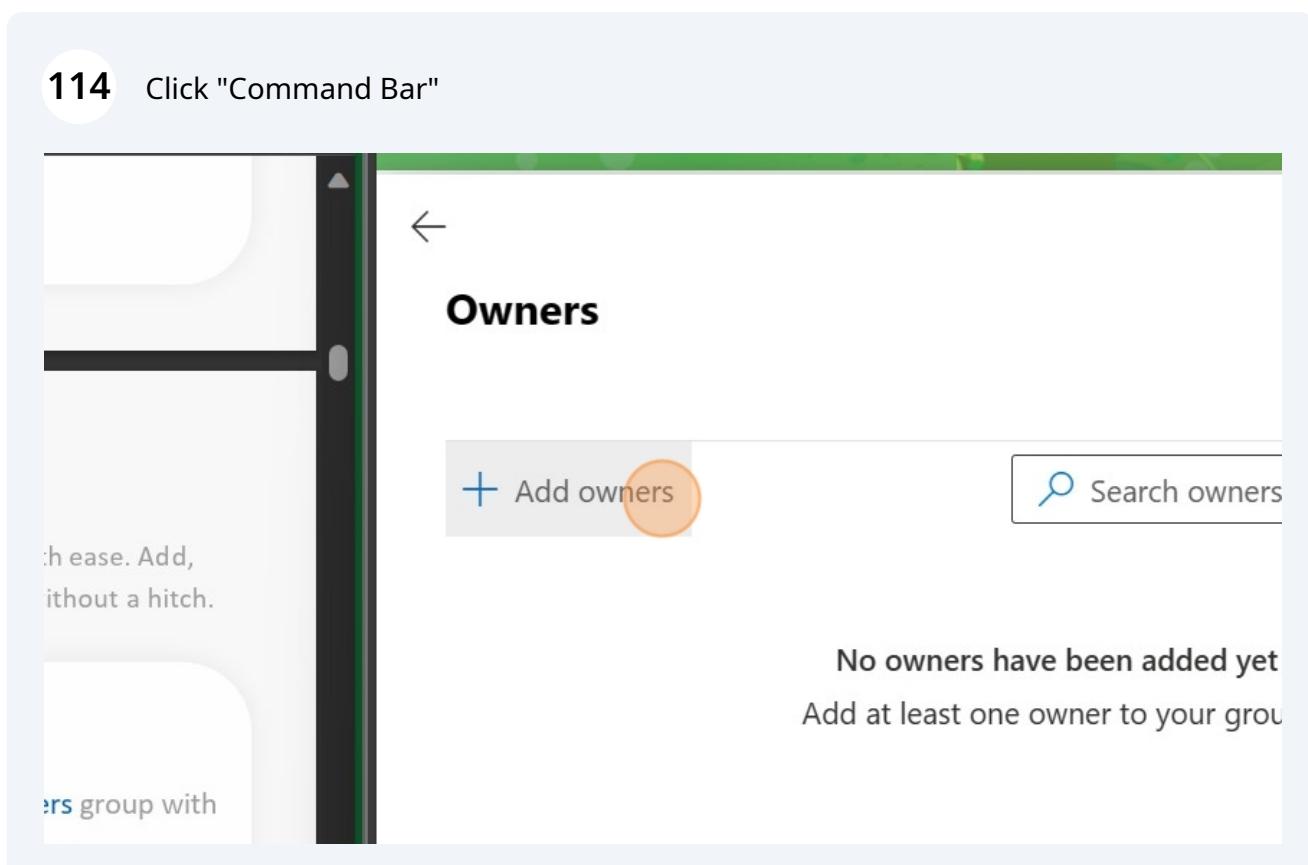
Search owners list

No owners have been added yet
Add at least one owner to your group.

113 Click here



114 Click "Command Bar"



115 Click here

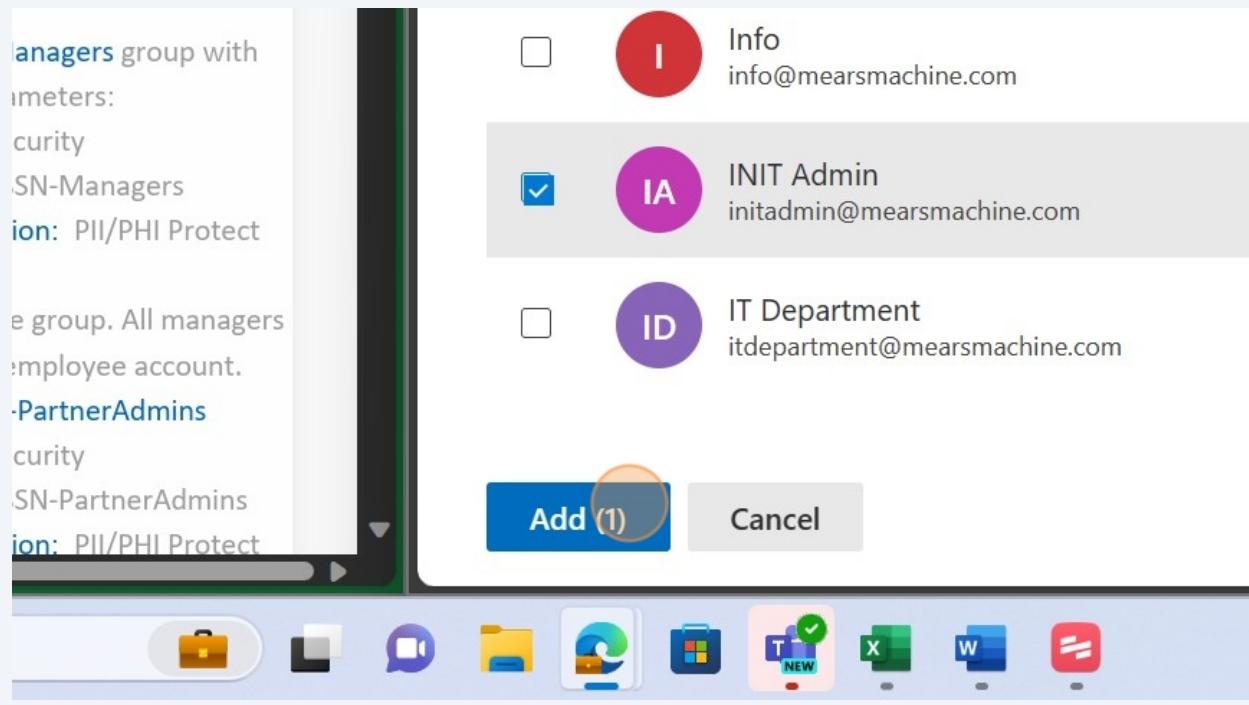
The screenshot shows the Microsoft 365 admin center interface. At the top, there's a green header bar with the title "Microsoft 365 admin center". Below the header, a left sidebar has a back arrow icon and the text "Add owners". A search bar labeled "Search for an owner" is present. Underneath, there's a checkbox labeled "Display name". The main area contains four user entries, each with a checkbox and a colored circular icon:

- Chris Inman (purple circle, CI) - Email: cinman@mearsmachine.com
- Info (red circle, I) - Email: info@mearsmachine.com
- INIT Admin (pink circle, IA) - Email: initadmin@mearsmachine.com
- IT Department (purple circle, ID) - Email: itdepartment@mearsmachine.com

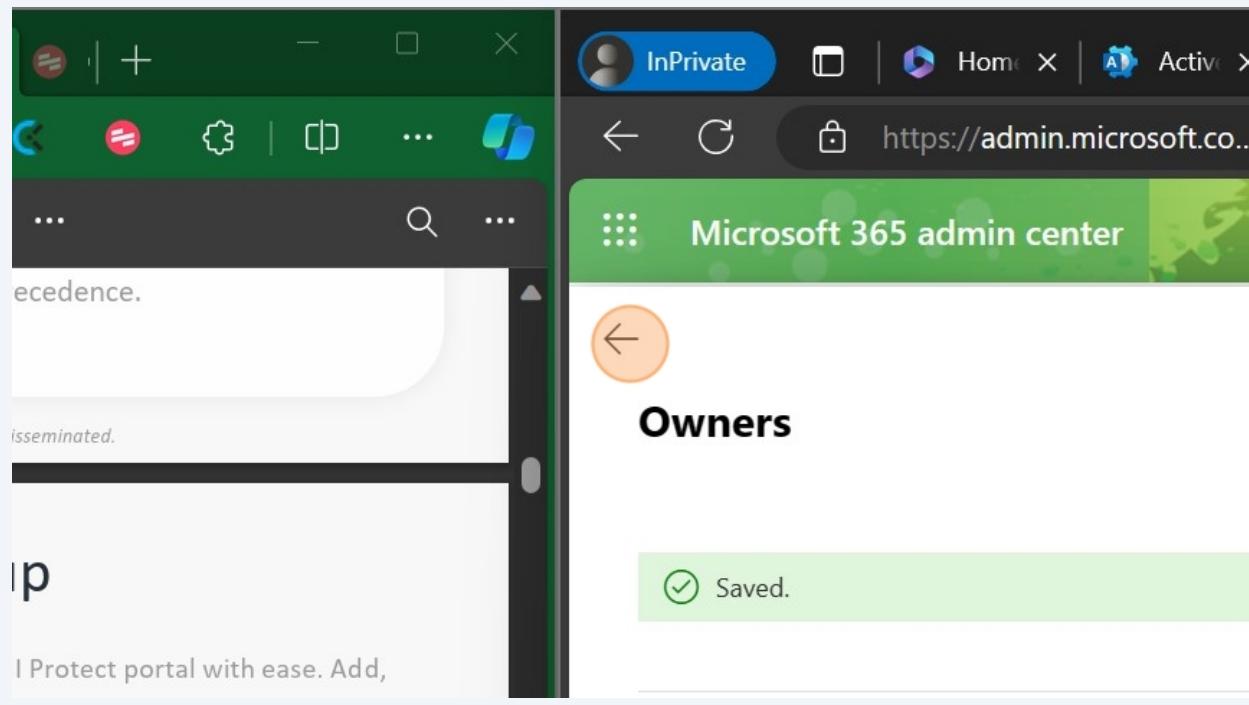
116 Click here

This screenshot is identical to the one above, showing the "Add owners" page in the Microsoft 365 admin center. The INIT Admin entry is highlighted with a gray background and an orange circle around the "IA" icon. The other three entries (Chris Inman, Info, and IT Department) are shown in white boxes.

117 Click here



118 Click here



119 Click here

The screenshot shows the Microsoft Teams navigation bar. The 'Members' tab is highlighted with a blue background and white text. To the left of the navigation bar, there is a sidebar with various group names listed. The 'Members' tab has a circled orange highlight around it.

nagers group with
meters:
urity
N-Managers
n: PII/PHI Protect

group. All managers
mployee account.
artnerAdmins
urity
N-PartnerAdmins
n: PII/PHI Protect

Owners (0)
[View all and manage owners](#)

Members (0)
[View all and manage members](#)

Icons in the navigation bar: Home, People, Video, File, Task, Microsoft Store, Excel, Word, Power BI.

120 Click here

The screenshot shows the 'Members' page in Microsoft Teams. The title 'Members' is at the top. Below it is a button labeled '+ Add members' with a circled orange highlight. To the right is a search bar labeled 'Search'. A message at the bottom says 'No members have been added' and 'Add at least one member to your team'.

Members

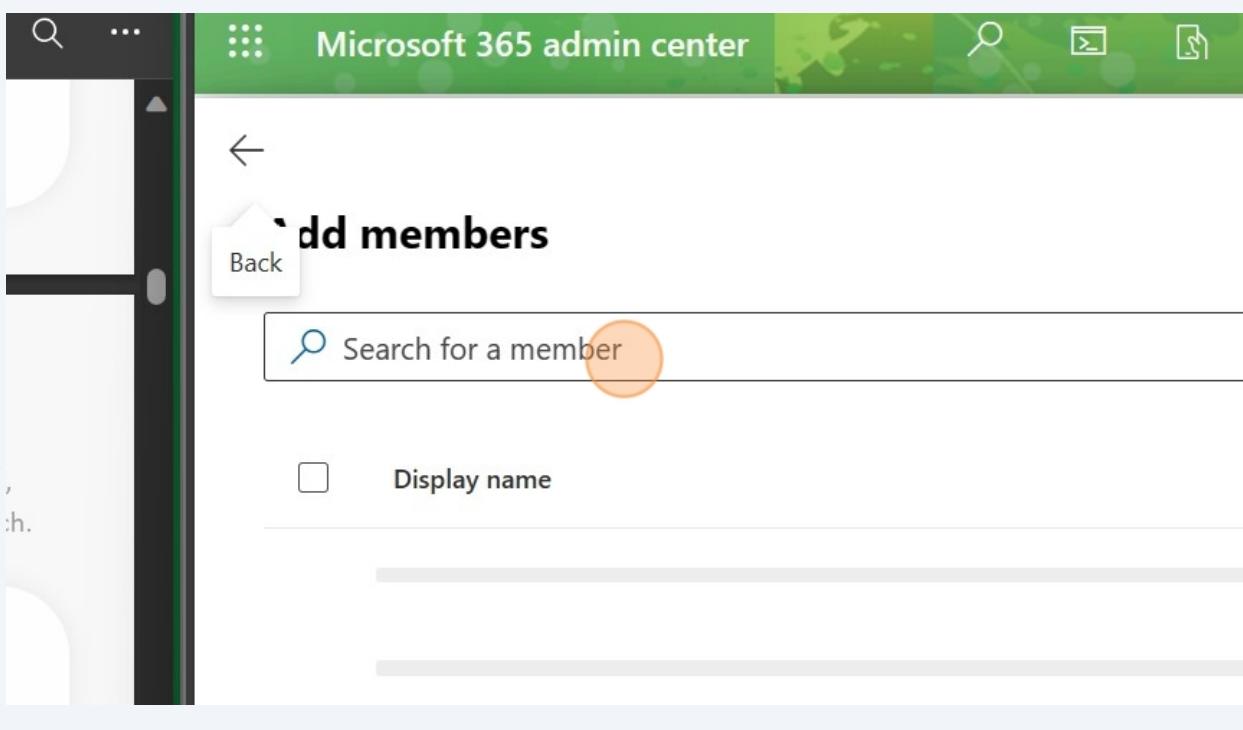
+ Add members

Search

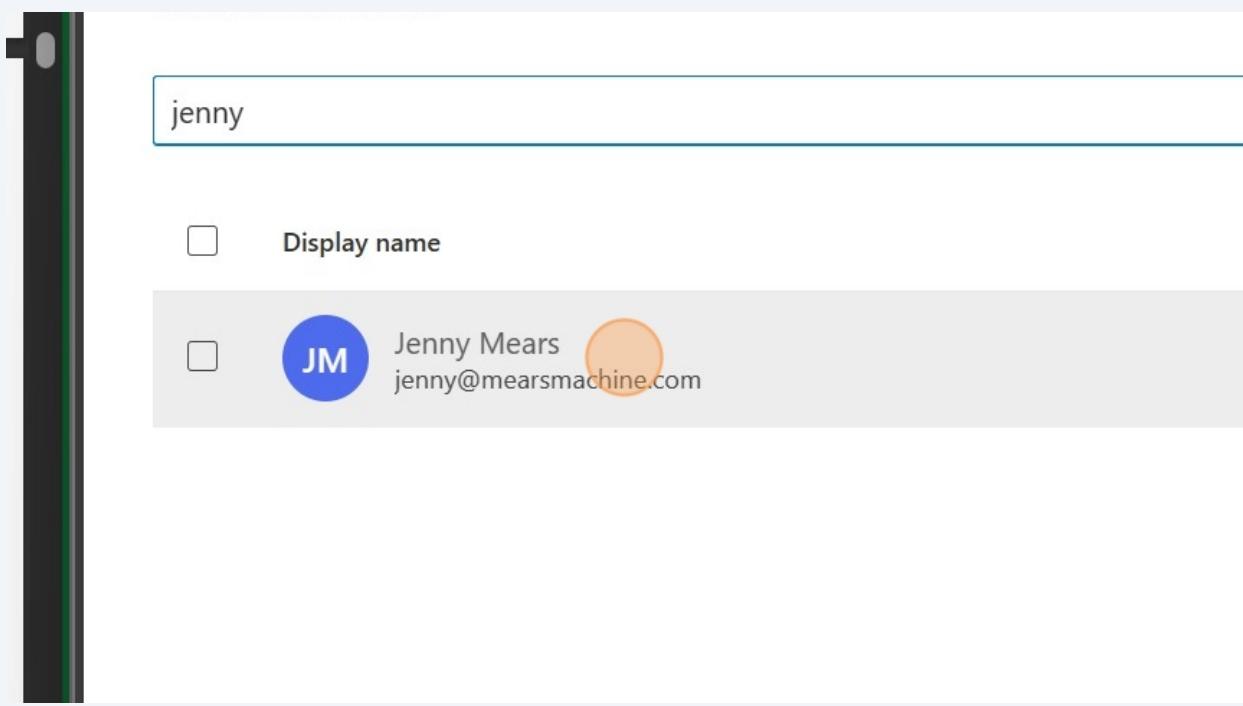
No members have been added
Add at least one member to your team

-Managers group with
parameters:

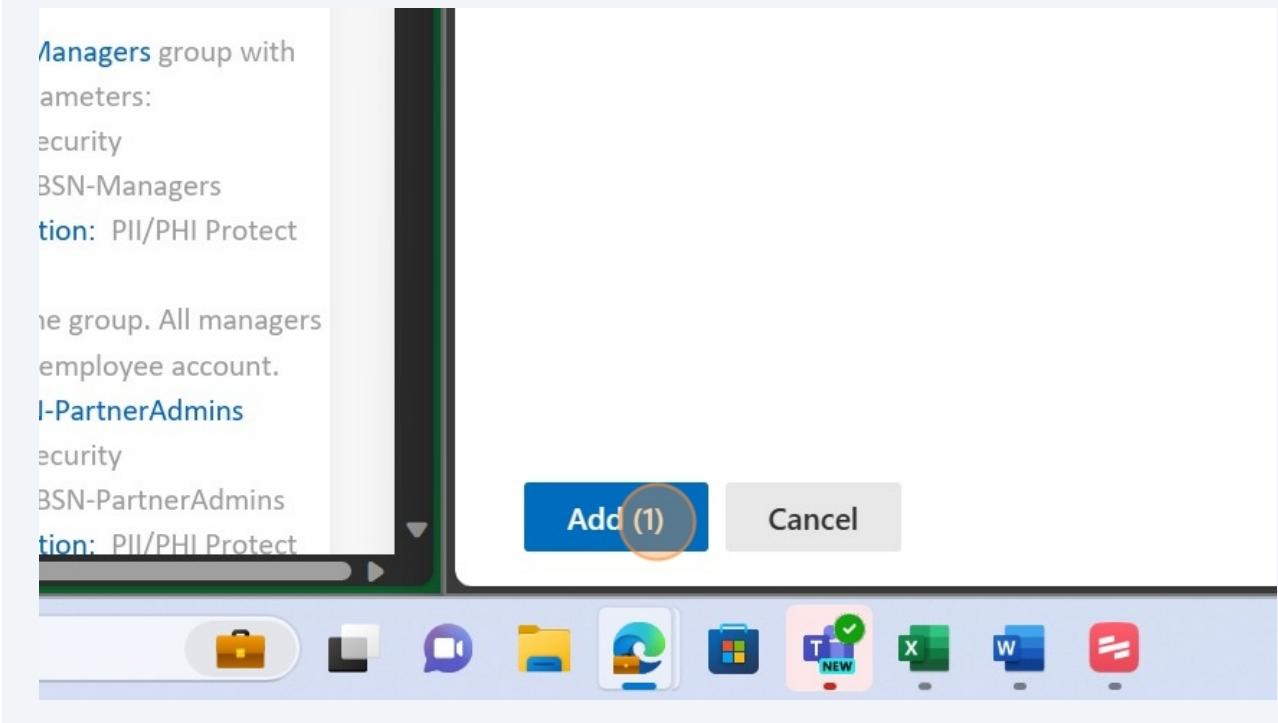
121 Click here



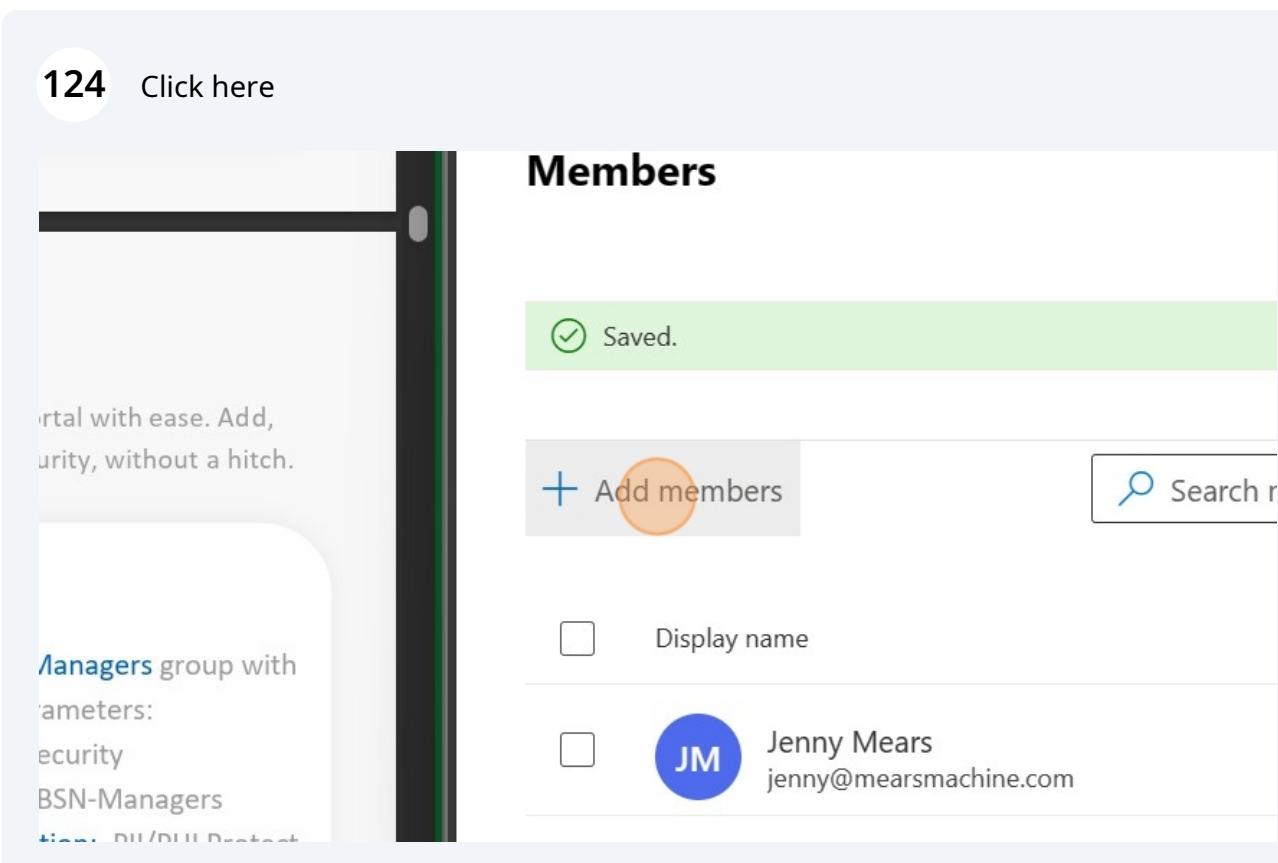
122 Click here



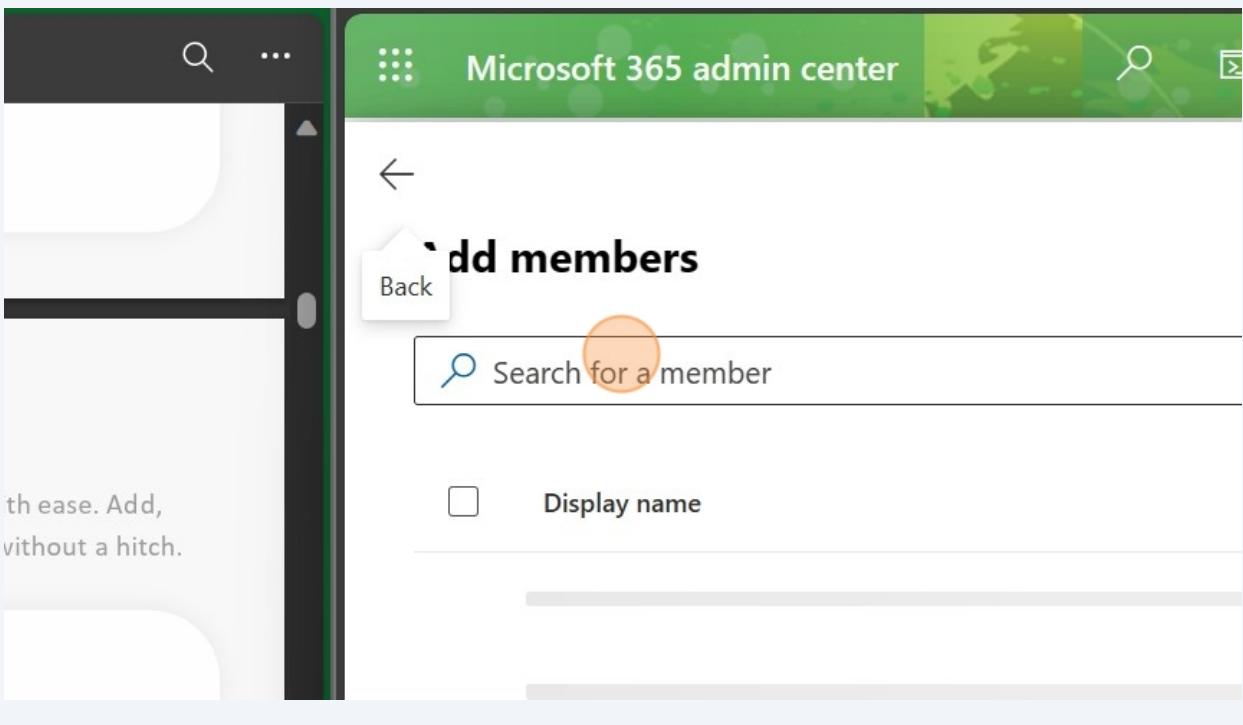
123 Click here



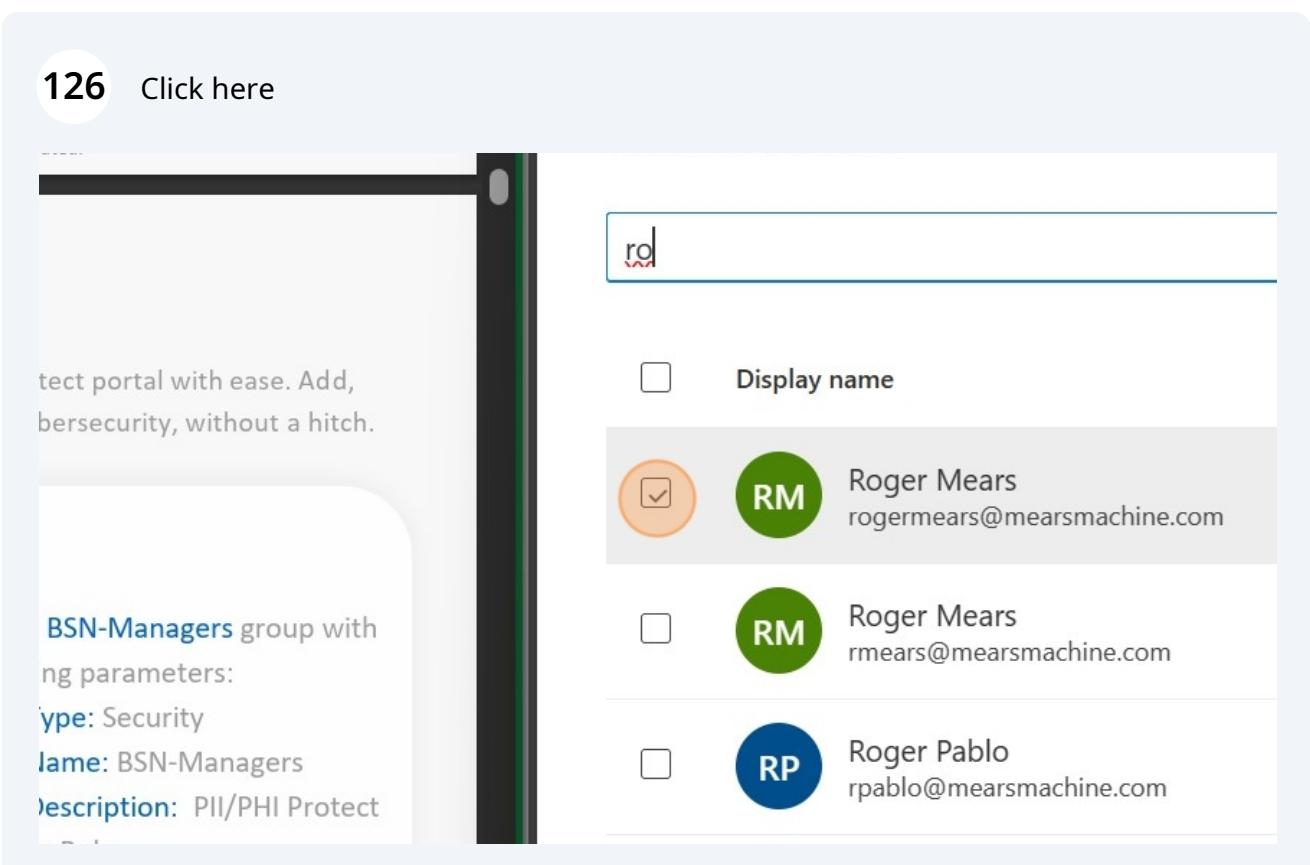
124 Click here



125 Click here



126 Click here



127 Click here

ect portal with ease. Add, ersecurity, without a hitch.

BSN-Managers group with ng parameters:
Type: Security
Name: BSN-Managers
Description: PII/PHI Protect Role s to the group. All managers /e an employee account.

Display name

RM Roger Mears rogermears@mearsmachine.com

RM Roger Mears rmears@mearsmachine.com

RP Roger Pablo rpablo@mearsmachine.com

128 Click here

Managers group with rameters:
ecurity
BSN-Managers
otion: PII/PHI Protect

he group. All managers employee account.

N-PartnerAdmins

ecurity

BSN-PartnerAdmins

otion: PII/PHI Protect

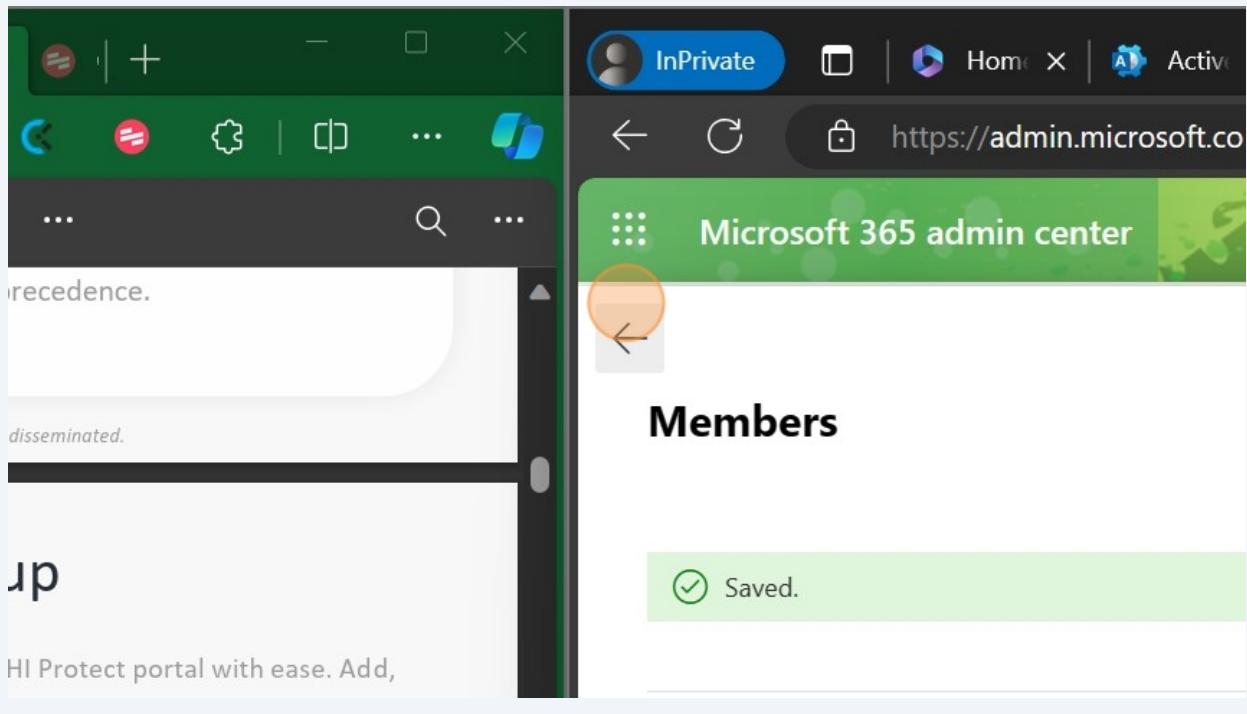
RM Roger Mears rmears@mearsmachine.com

RP Roger Pablo rpablo@mearsmachine.com

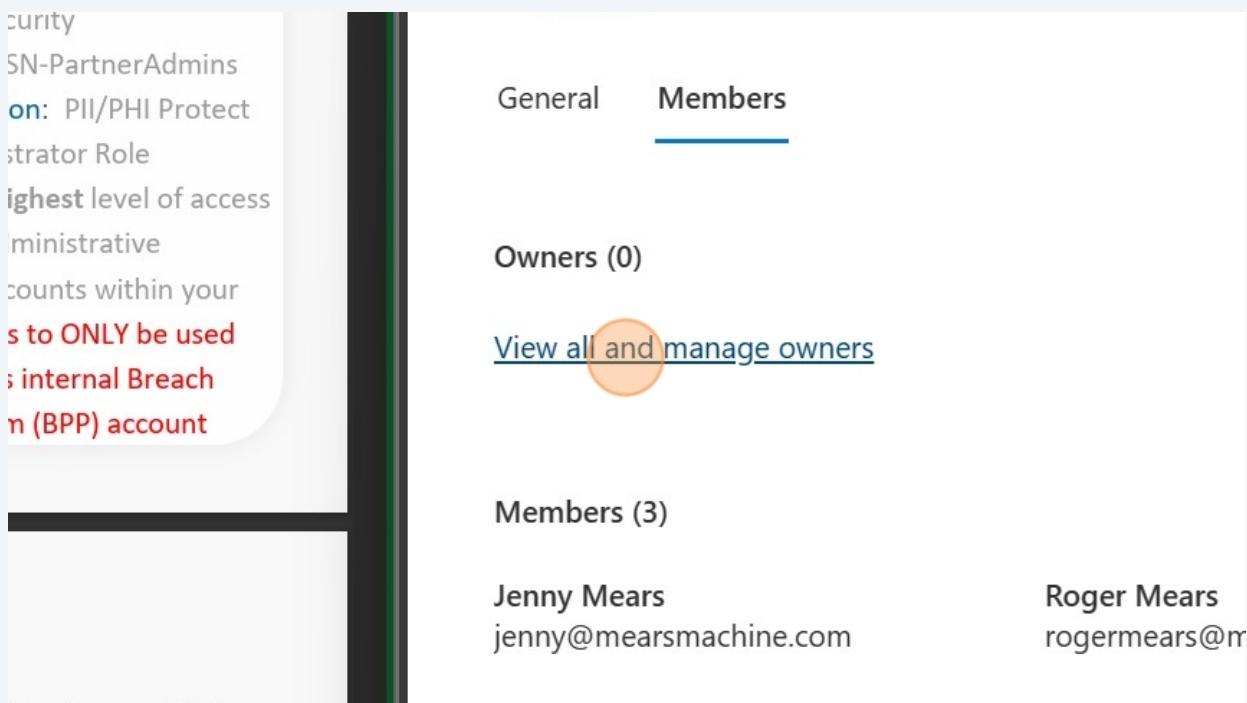
Add (2)

Cancel

129 Click here



130 Click here



131 Click here

The screenshot shows a Microsoft Edge browser window with the Microsoft 365 admin center open. The URL in the address bar is https://admin.microsoft.com. The page displays the 'Owners' section, which includes a back arrow icon and the word 'Owners'. Below this, there is a '+ Add owners' button and a search icon. A callout bubble with the number '131' is pointing to the 'Owners' section.

132 Click here

The screenshot shows a Microsoft Edge browser window displaying the 'Members' section of a group. The title 'Members (3)' is visible. Three members are listed: Jenny Mears (jenny@mearsmachine.com), Roger Mears (rogermears@mearsmach...), and another Roger Mears (rmears@mearsmachine.com). Below the member list is a link labeled 'View all and manage members'. A callout bubble with the number '132' is pointing to this link. On the left side of the screen, there is a vertical sidebar with some text and icons.

133 Click here

ave an employee account.
Group: BSN-PartnerAdmins
Type: Security
Name: BSN-PartnerAdmins
Description: PII/PHI Protect Administrator Role
as the **highest** level of access
ve all administrative
or all accounts within your
group is to ONLY be used
company's internal Breach Platform (BPP) account

ated.

+ Add members



Display name

- | | | |
|--------------------------|----|--|
| <input type="checkbox"/> | JM | Jenny Mears
jenny@mearsmachine.com |
| <input type="checkbox"/> | RM | Roger Mears
rogermears@mearsmachine.com |
| <input type="checkbox"/> | RM | Roger Mears
rmears@mearsmachine.com |

134 Click here

ame: BSN-PartnerAdmins
escription: PII/PHI Protect Administrator Role
is the **highest** level of access
ve all administrative
or all accounts within your
group is to ONLY be used
company's internal Breach Platform (BPP) account

ated.

Display name

- | | | |
|-------------------------------------|----|--|
| <input checked="" type="checkbox"/> | JM | Jenny Mears
jenny@mearsmachine.com |
| <input type="checkbox"/> | RM | Roger Mears
rogermears@mearsmachine.com |
| <input type="checkbox"/> | RM | Roger Mears
rmears@mearsmachine.com |

ect portal with ease. Add,

135 Click here

is the highest level of access
ve all administrative
or all accounts within your
group is to ONLY be used
company's internal Breach
Platform (BPP) account

ated.

ect portal with ease. Add,
persecurity, without a hitch.

- | | | |
|-------------------------------------|----|--|
| <input checked="" type="checkbox"/> | JM | Jenny Mears
jenny@mearsmachine.com |
| <input checked="" type="checkbox"/> | RM | Roger Mears
rogermears@mearsmachine.com |
| <input type="checkbox"/> | RM | Roger Mears
rmears@mearsmachine.com |

136 Click here

members

Add members

 Search members list



Display name



Jenny Mears
jenny@mearsmachine.com



137 Click here

The screenshot shows a list of members with two items selected. A context menu is open over the second item, containing options for removing the members. The menu items are: 'Remove members' (with an orange circle highlighting it) and '3 selected'.

Display name	Email
Jenny Mears	jenny@mearsmachine.com
Roger Mears	rogermears@mearsmachine.com

138 Click here

A confirmation dialog box is displayed, asking if the user is sure they want to remove the selected group members. The dialog has two buttons: 'Yes' (highlighted with an orange circle) and 'No'.

Are you sure you want to remove the group members?

Yes No

Display name	Email
Roger Mears	rogermears@mearsmachine.com
Roger Mears	rmears@mearsmachine.com

139 Click here

The screenshot shows the Microsoft 365 admin center interface. On the left, there's a sidebar with various administrative links. The main area is titled "Members". A green banner at the top says "Saved." with a checkmark icon. Below it, there's a button labeled "+ Add members" and a search bar with a magnifying glass icon labeled "Search members". A message in the center states "No members have been added yet" and "Add at least one member to your group".

140 Click here

The screenshot shows the "Add members" page within the Microsoft 365 admin center. At the top, there's a back arrow and a "Back" button. The main title is "Add members". Below it is a search bar with a magnifying glass icon and the placeholder text "Search for a member". There's also a checkbox labeled "Display name".

141 Click here

Display name

AG Andrew Greene admin@mearsmachine.onmicrosoft.com

AG Andrew Greene agreene@mearsmachine.com

AS Anthony Soney asoney@hmith.com

142 Click here

All accounts within your group is to ONLY be used company's internal Breach Platform (BPP) account.

Select portal with ease. Add, resecurity, without a hitch.

AG Andrew Greene agreene@mearsmachine.com

AS Anthony Soney asoney@hmith.com

Add (1) Cancel

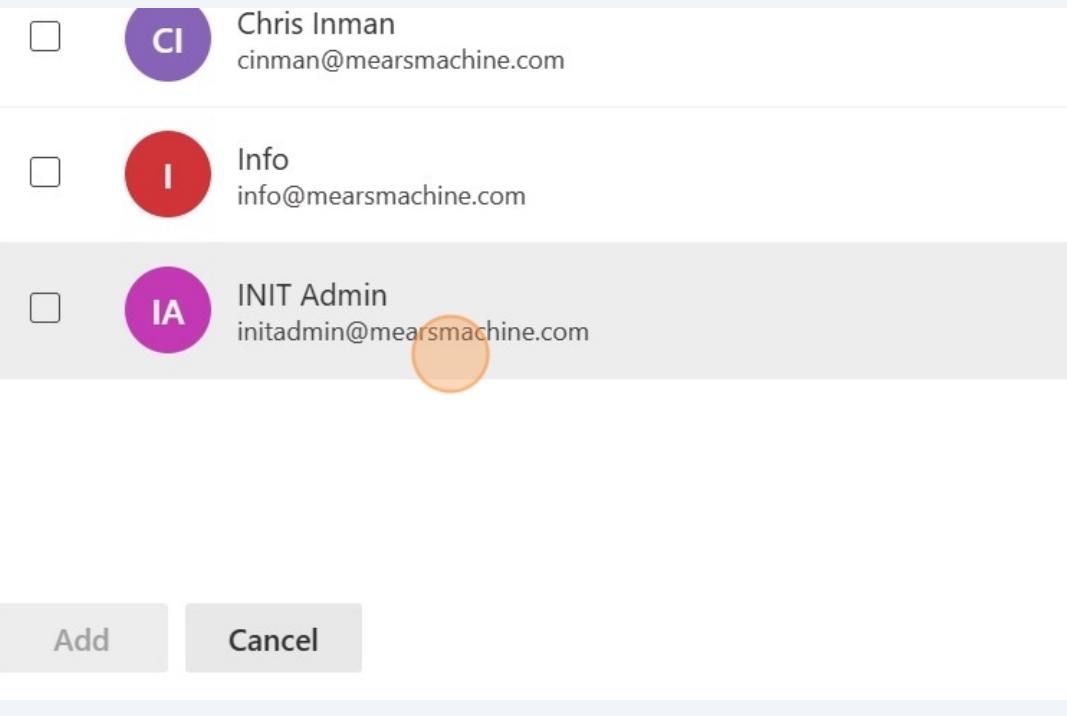
143 Click here

The screenshot shows the Microsoft 365 admin center interface. On the left, there is a vertical sidebar with various navigation options. In the center, the title "Members" is displayed above a list of users. At the top right, there is a green banner with the text "Saved." and a checkmark icon. Below the banner, there is a button labeled "+ Add members" with an orange circular highlight around it. To the right of the button is a search bar with the placeholder "Search". The user list includes a row for Andrew Greene, who has the initials "AG" in a green circle. There is also a checkbox labeled "Display name". The overall background is white with some green and grey accents.

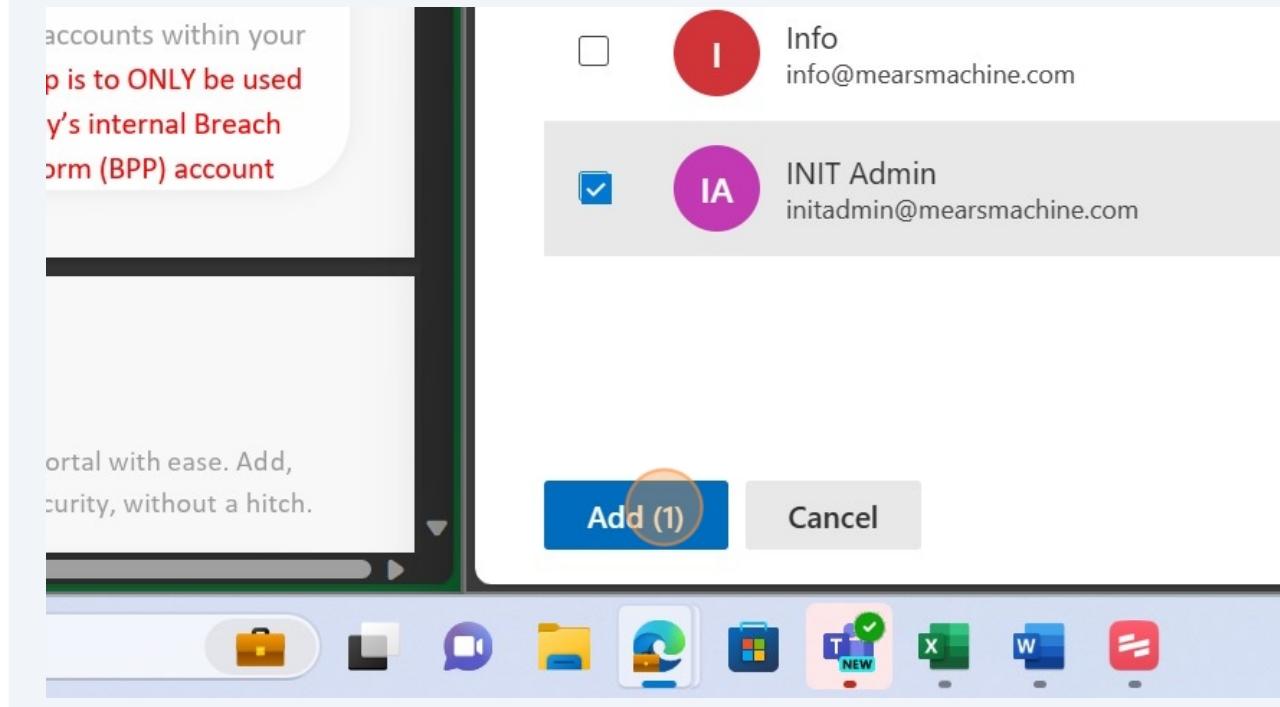
144 Click here

The screenshot shows the Microsoft 365 admin center interface. On the left, there is a vertical sidebar with various navigation options. In the center, the title "Add members" is displayed above a search bar with the placeholder "Search for a member". Below the search bar, there is a checkbox labeled "Display name". The overall background is white with some green and grey accents.

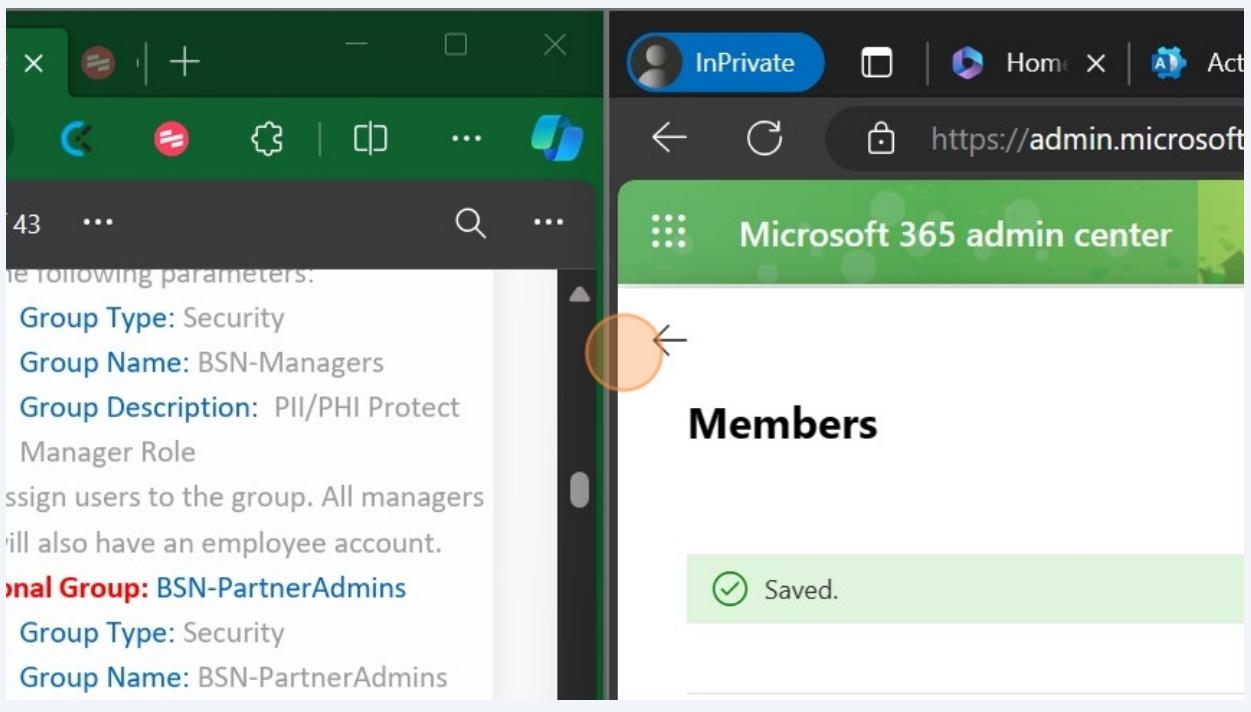
145 Click here



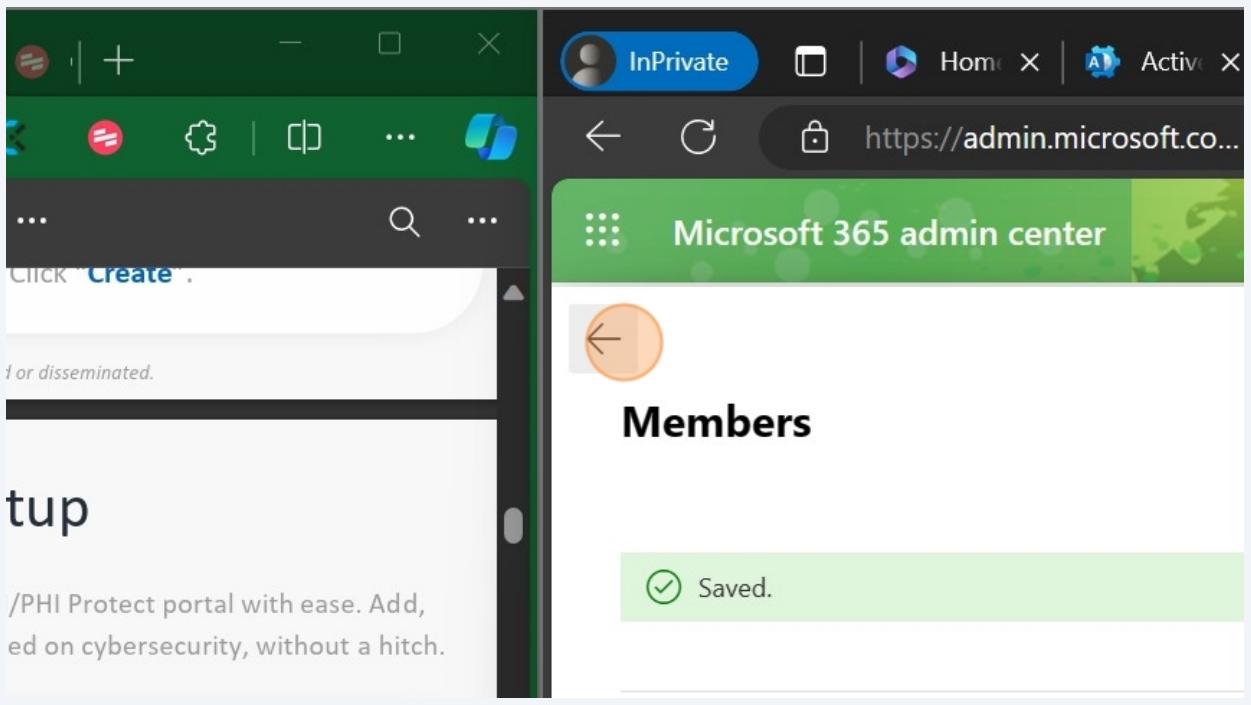
146 Click here



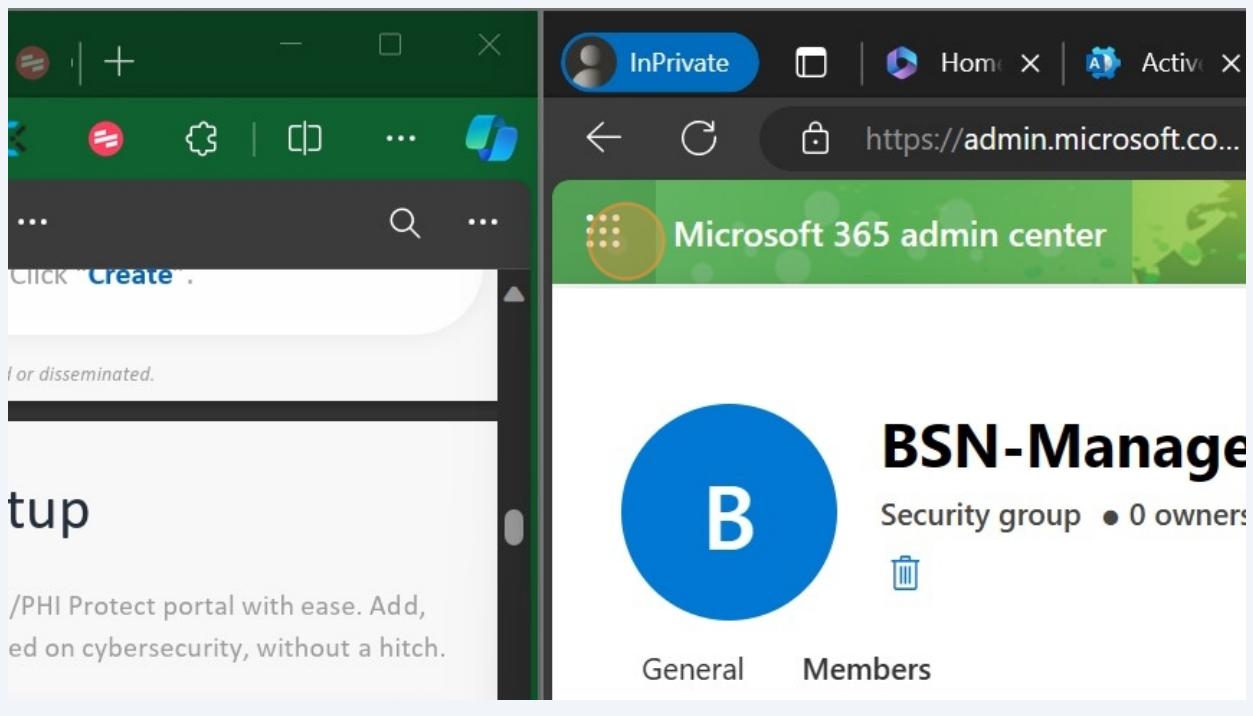
147 Click here



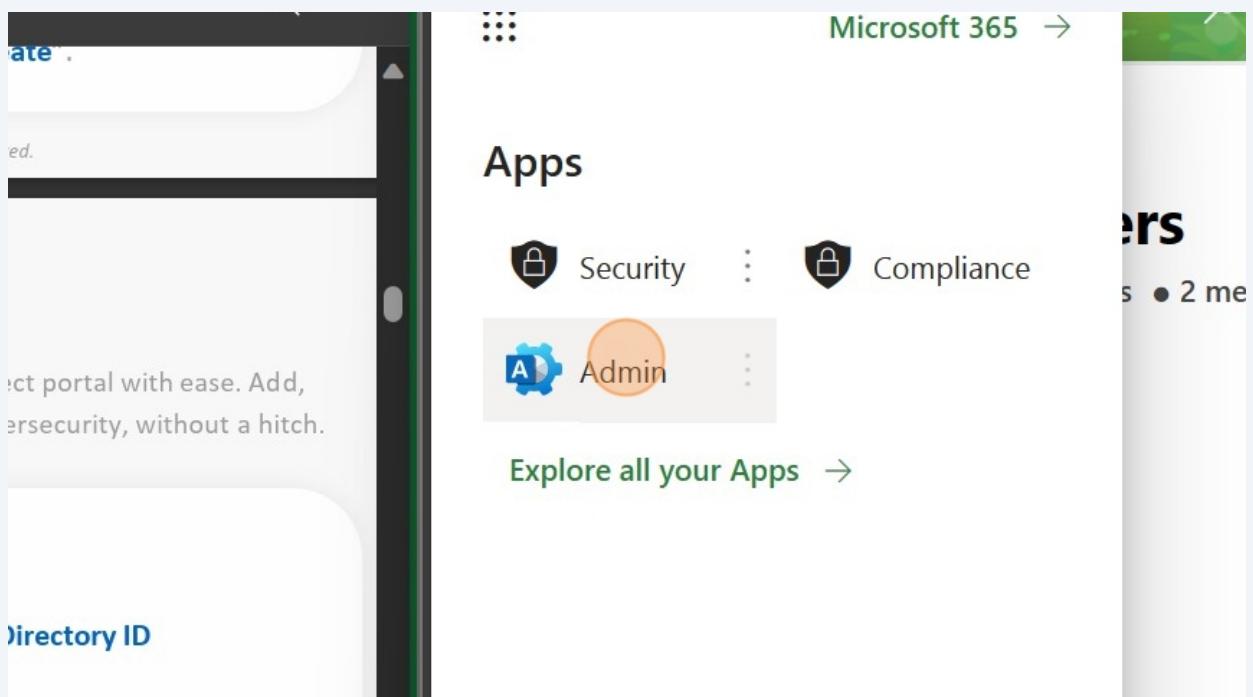
148 Click here



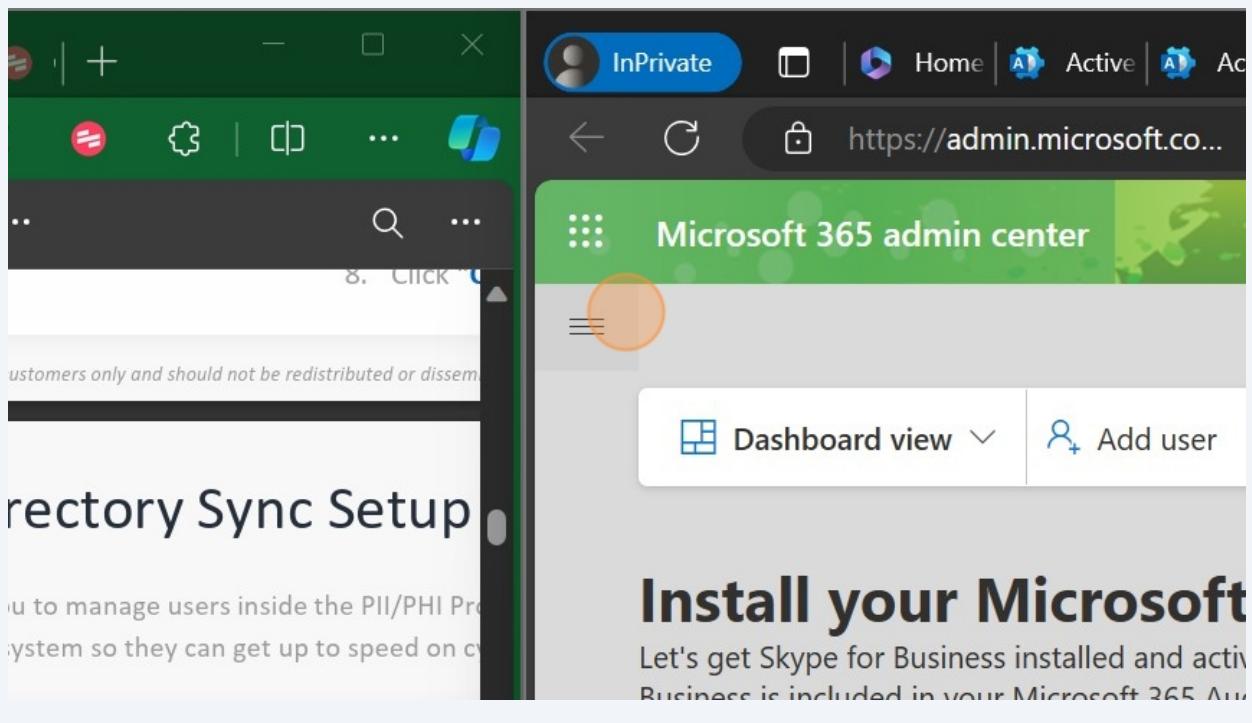
149 Click "App launcher"



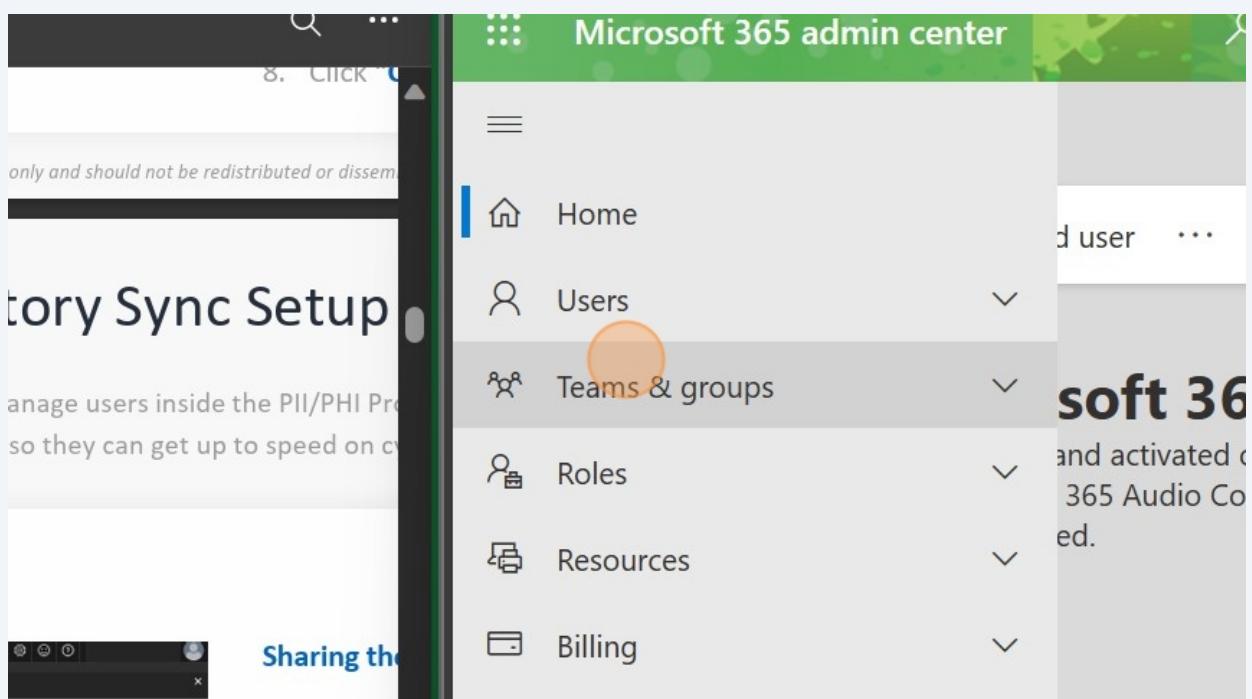
150 Click "Admin"



151 Click here



152 Click here



153 Click here

The screenshot shows the Microsoft 365 Admin Center interface. On the left, there's a sidebar with navigation links: Home, Users, Teams & groups, Active teams & groups (which is highlighted with a yellow circle), Deleted groups, Shared mailboxes, Roles, and Resources. The main content area has a heading 'Sync Setup' and some descriptive text. A progress bar at the bottom indicates steps 9 and 10.

154 Click here

The screenshot shows the Microsoft 365 Admin Center with the 'Active teams and groups' page selected. The top navigation bar includes links for Home, Active users, Active groups, and Active roles. Below the header, there's a breadcrumb trail 'Home > Active teams & groups' and a 'Enable Dark mode' button. The main content area features a large heading 'Active teams and groups' and several navigation links: 'About Groups', 'Using Teams And SharePoint', 'Where to store files', and 'More files'.

155 Click here

The screenshot shows a software interface with a sidebar on the left and a main content area on the right.

Left Sidebar:

- Shared mailboxes
- Roles
- Resources
- Billing
- Settings** (highlighted with an orange circle)
- ... Show all

Main Content Area:

- Add a group
- Export
- Re
- Name ↑
- FTT Low Speed Shaft Schedu
- MMC
- TRAINING MATRIX

156 Click here

The screenshot shows a software interface with a top navigation bar and several settings options.

Top Bar:

- Using Teams And SharePoint
- Where to store files

Left Side:

- Distribution list
- Mail-enabled security

Center:

- Security (highlighted with an orange circle)

Right Side:

- Search

Bottom Bar:

- Export
- Refresh
- Email
- Sync status

157 Click here

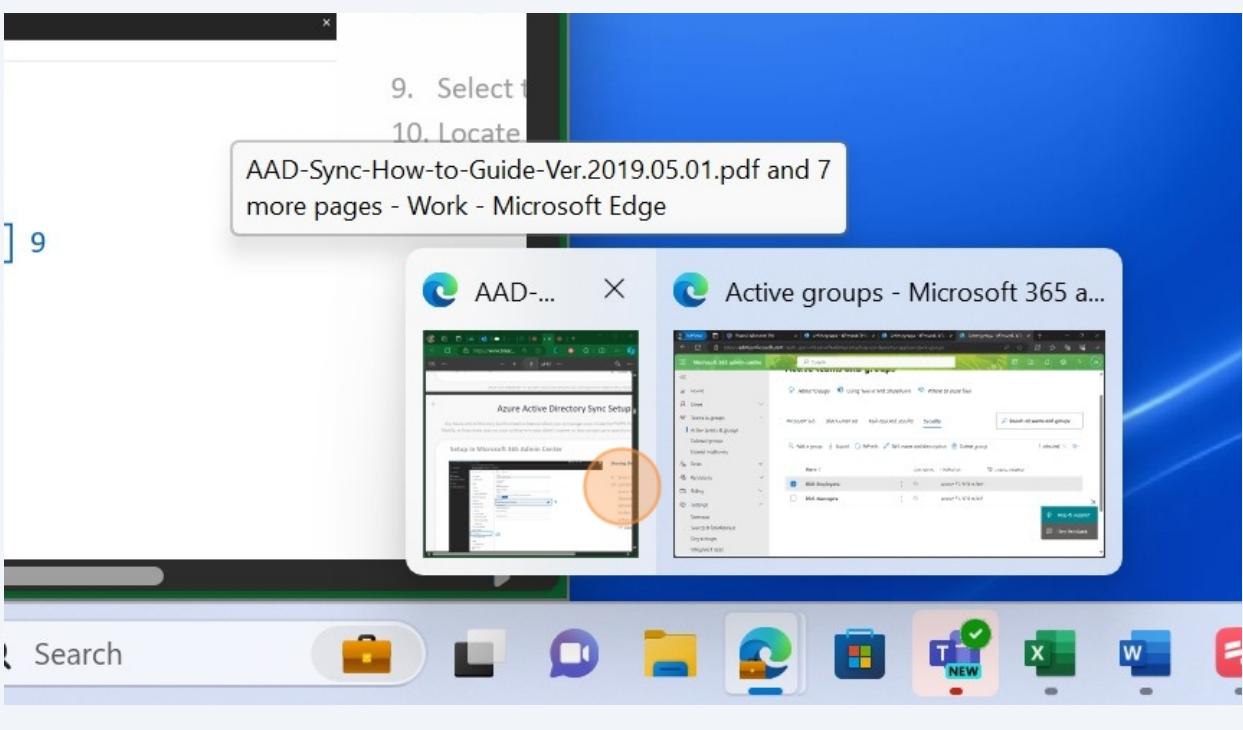
A screenshot of the Microsoft 365 Groups interface. On the left, there's a sidebar with arrows for navigation. At the top right, there are buttons for 'Add a group', 'Export', and 'Refresh'. Below these, a table lists groups. The first group, 'BSN-Employees', has its name underlined and is highlighted with an orange circle. The second group listed is 'BSN-Managers'. The table includes columns for Name, Sync status, and three dots for more options.

	Name ↑	Sync sta
<input type="checkbox"/>	<u>BSN-Employees</u>	⋮ ⚙️
<input type="checkbox"/>	BSN-Managers	⋮ ⚙️

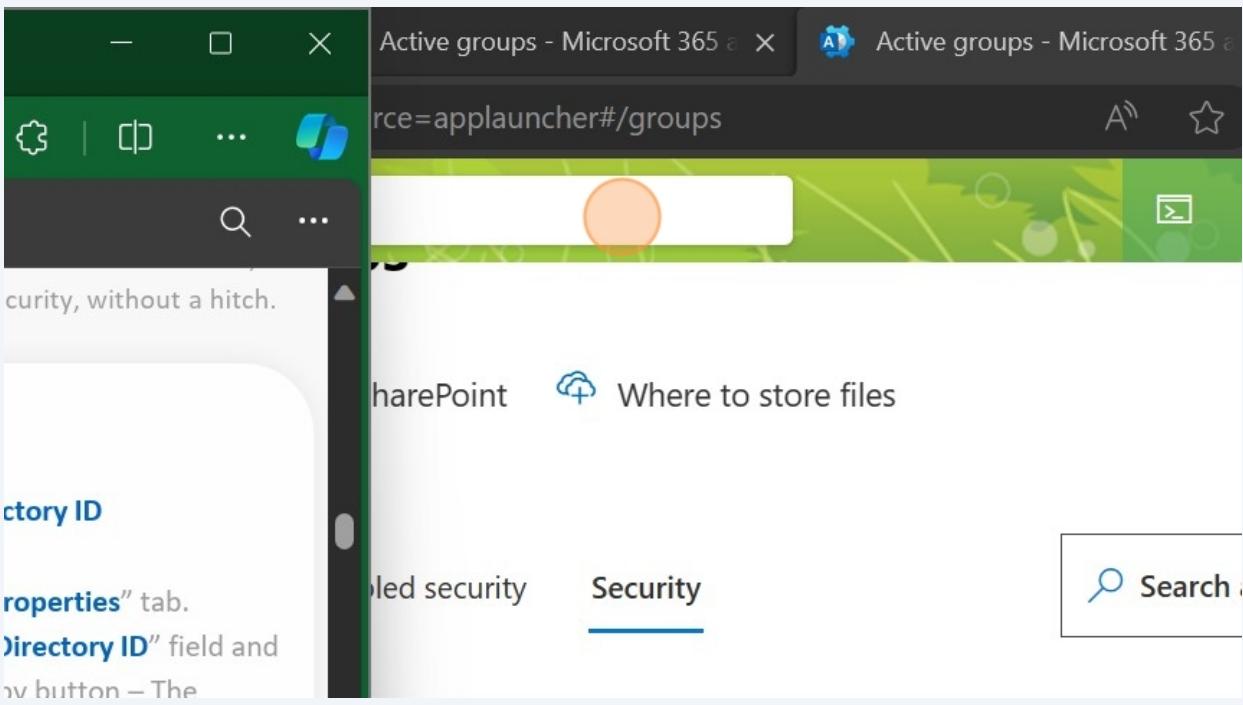
158 Click here

A screenshot of the Microsoft 365 Groups details page for the 'BSN-Employees' group. The title bar shows the group name and a back arrow. The main content area features a large blue circular icon with a white letter 'B'. The group name 'BSN-Employees' is displayed prominently in bold black text. Below it, it's identified as a 'Security group' with '1 owner' and '40 members'. There's a small trash can icon for deletion. At the bottom, there are tabs for 'General' and 'Members'.

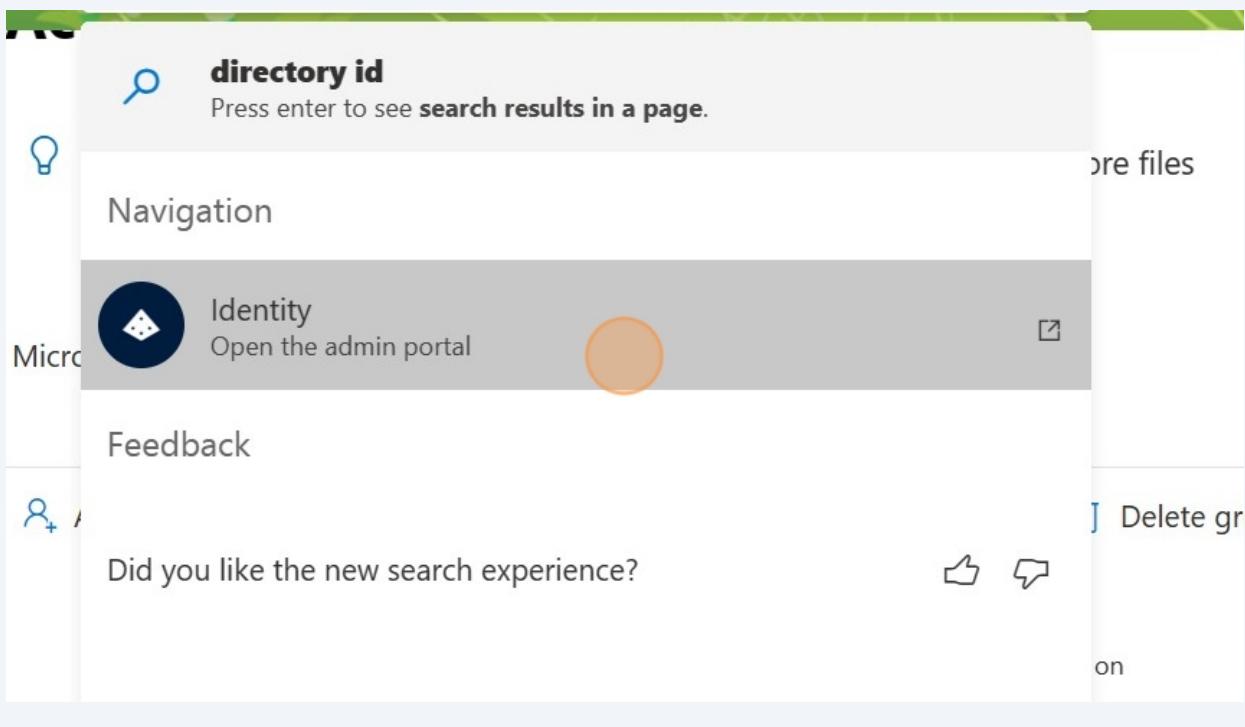
159 Click here



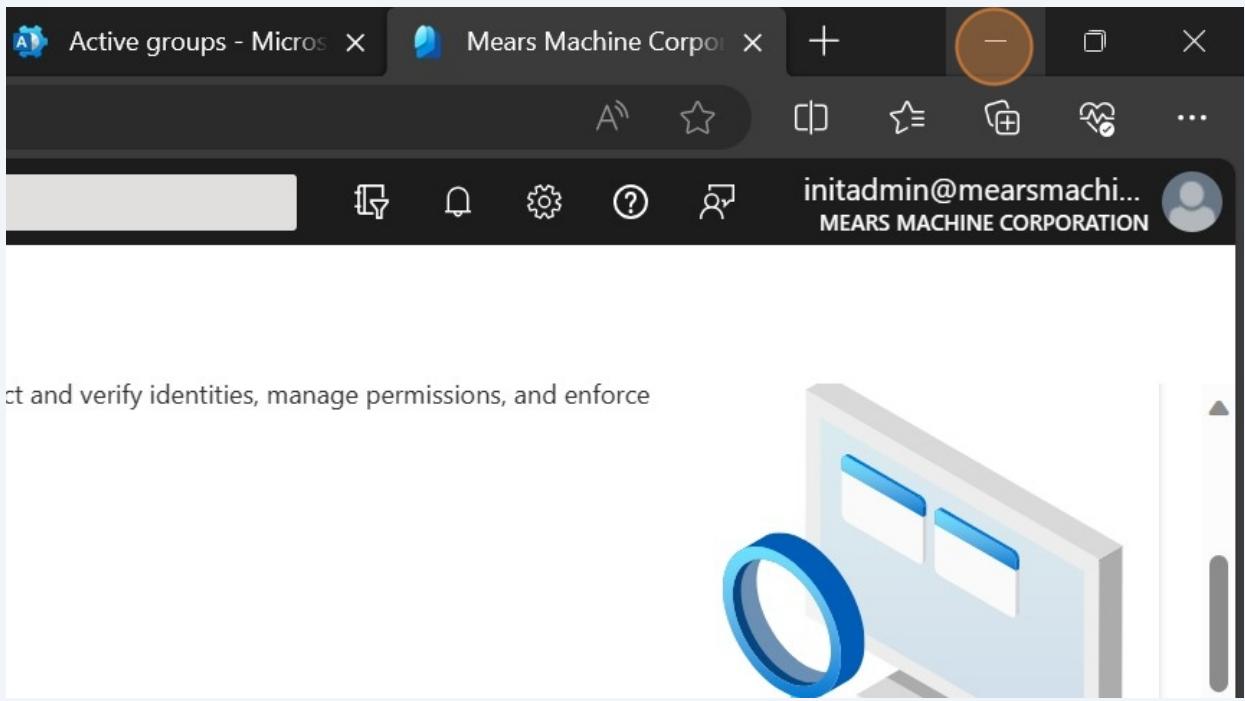
160 Click "Search box. Suggestions appear as you type."



161 Click here



162 Click here



163 Click here

They can get up to speed on cybersecurity, without a hitch.

Sharing the Directory ID

9. Select the “Properties” tab.
10. Locate the “Directory ID” field and press the Copy button – The

Conditional Formatting
Format as Table
Cell Styles
Styles

	C	D	E
Rebecca	Hull		
Rick	Perry		
rilev	deme		

164 Click here

m/wp-content/uploads/2019/05/AAD-Sync-How-to-Guide-Ve... PII Protected

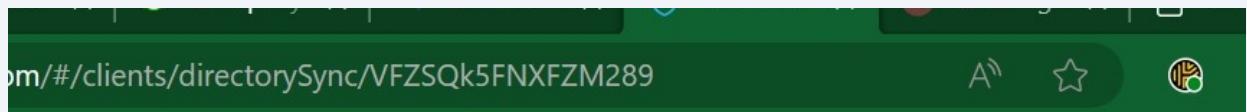
activate users as soon as they’re in your client’s system so they can get up to speed on cybersecurity, with

In Microsoft 365 Admin Center

Sharing the Directory ID

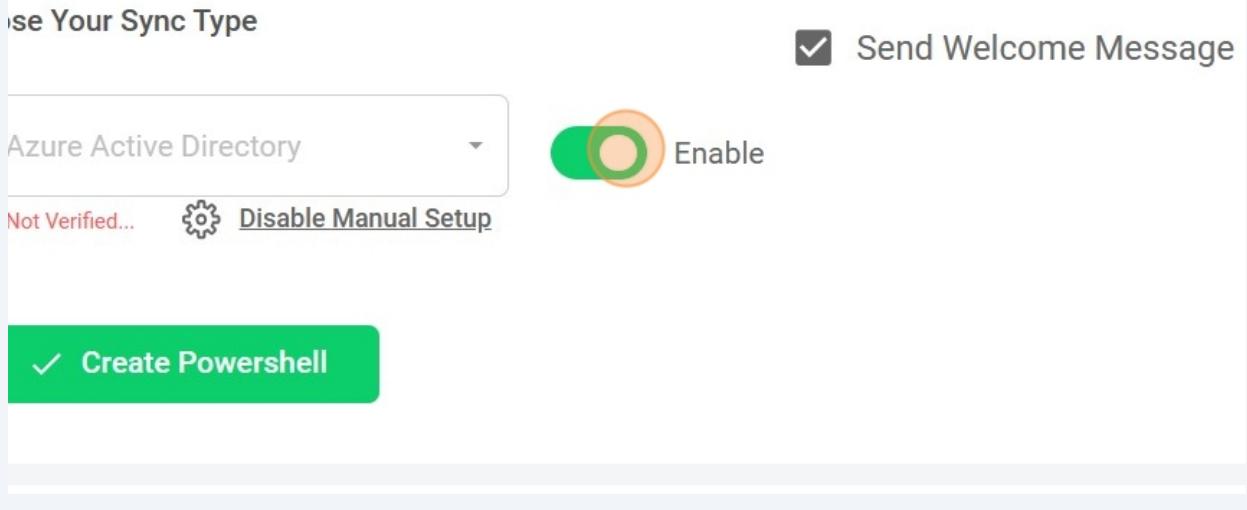
9. Select the “Properties” tab.
10. Locate the “Directory ID” field and press the Copy button –

165 Click "Welcome Message is configured to send "



166 Click "Enable"

Welcome Message is configured to send immediately after a new user is added



167 Click "Enable"

>Welcome Message is configured to send immediately after a new user is added

Choose Your Sync Type

Send Welcome Message

Azure Active Directory



Enable

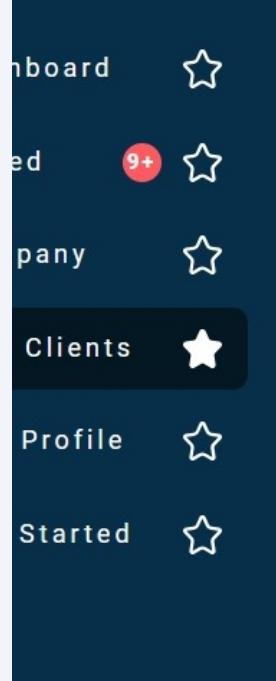
Not Verified...



Disable Manual Setup

Create Powershell

168 Click "Please Select"

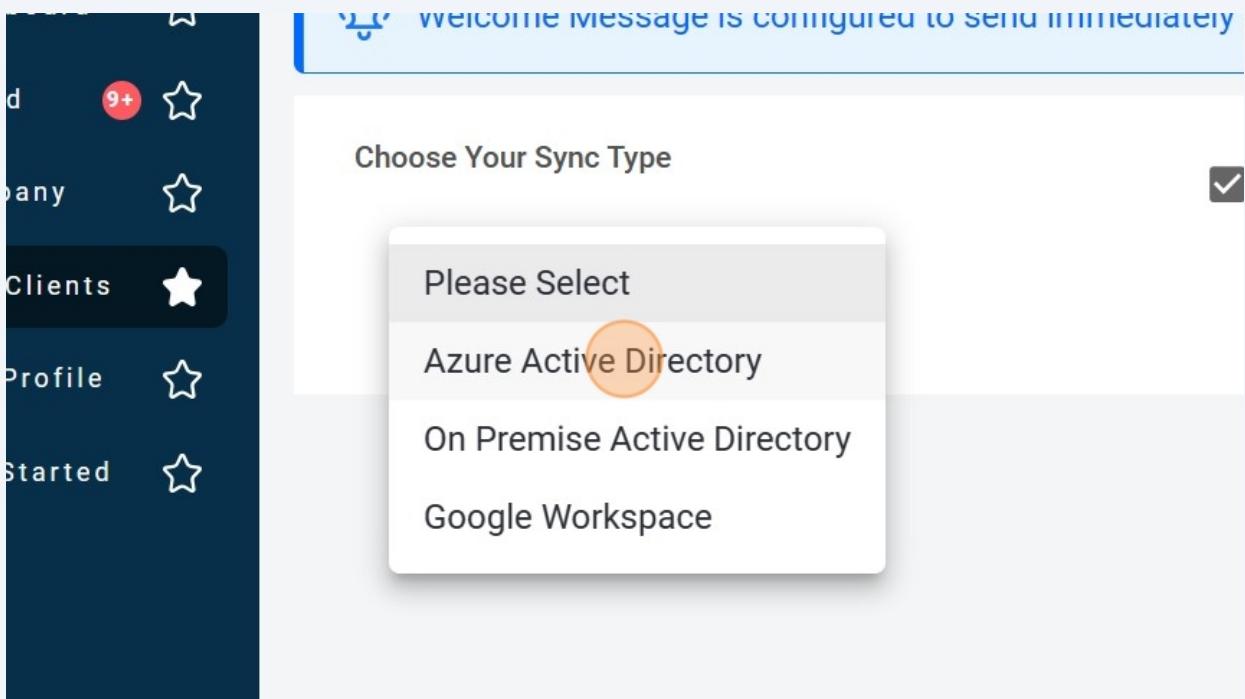


Welcome Message is configured to send immediately

Choose Your Sync Type

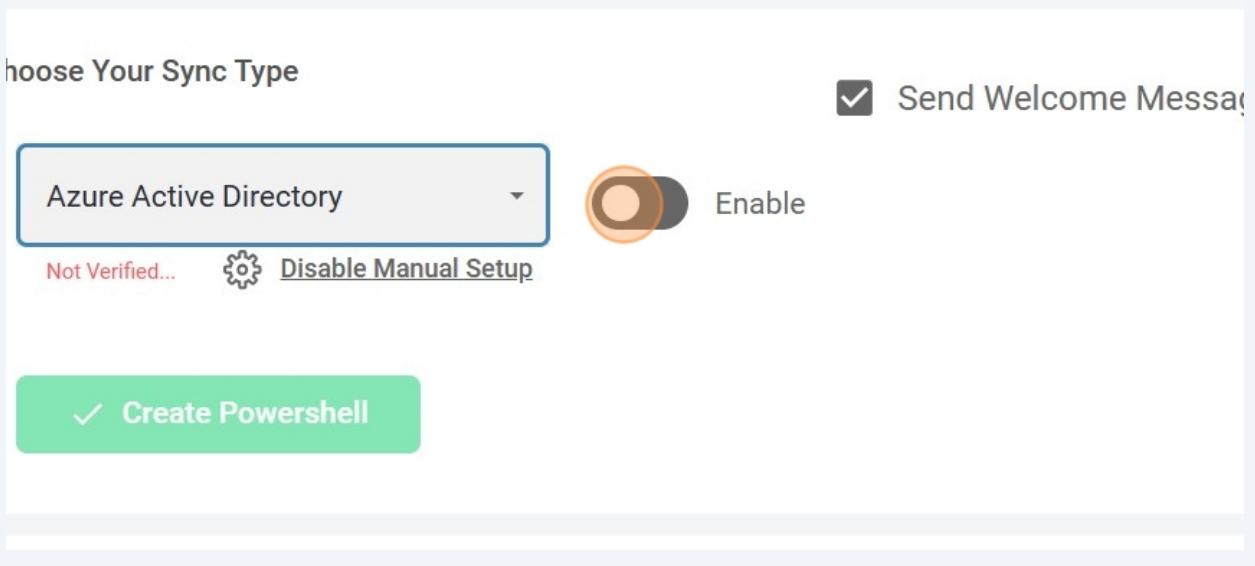
Please Select

169 Click "Azure Active Directory"

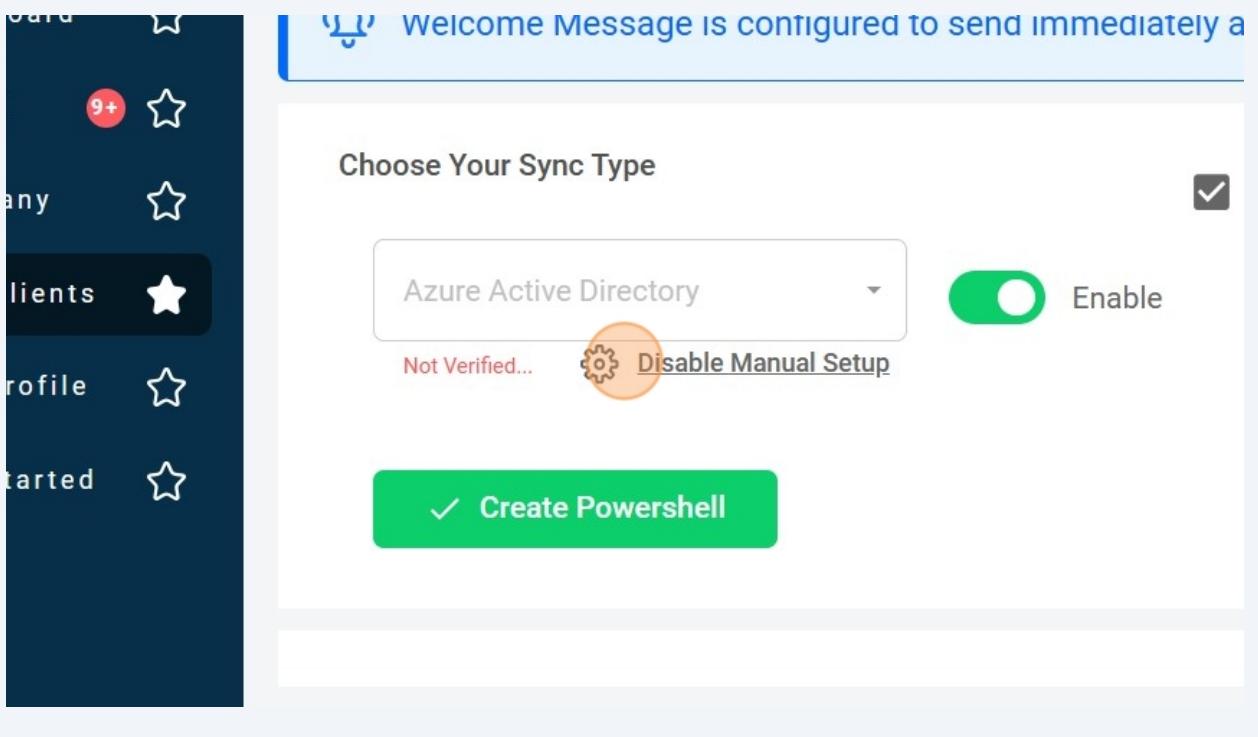


170 Click "Enable"

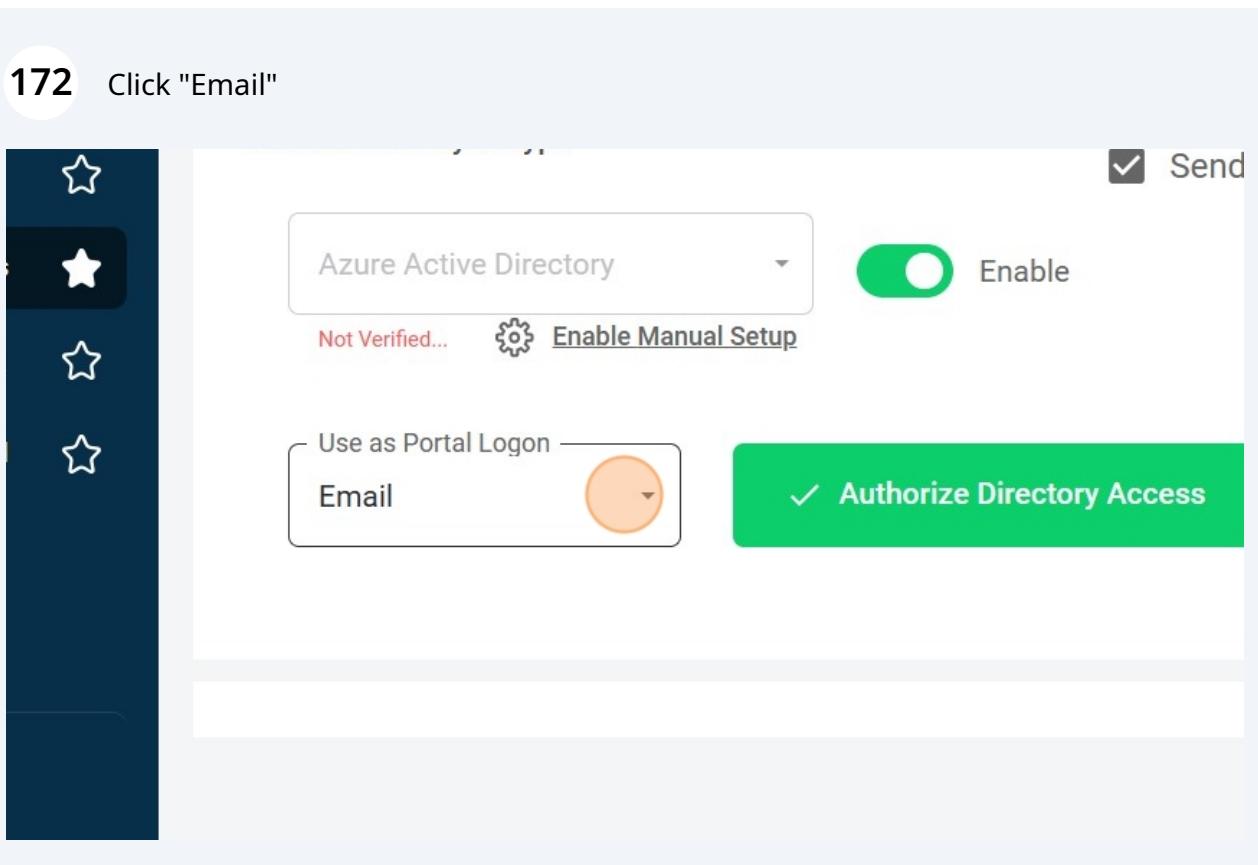
Welcome Message is configured to send immediately after a new user is added



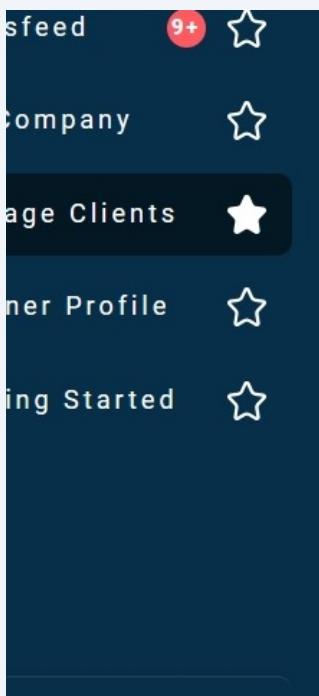
171 Click "Disable Manual Setup"



172 Click "Email"



173 Click here



Choose Your Sync Type

Azure Active Directory

Enable

Please Select

User Principal Name

Email

Manual Setup

Authorize Directory

174 Click "Authorize Directory Access"

Send Welcome Message

Azure Active Directory

Enable

Not Verified...



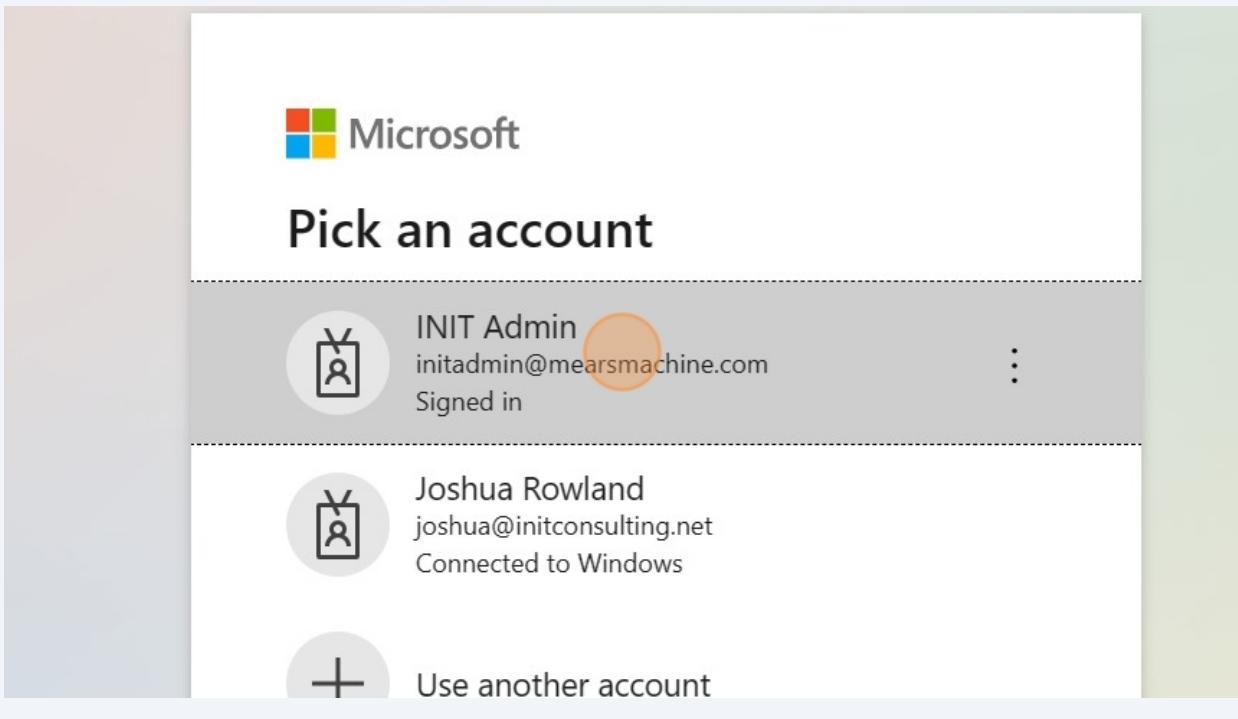
Enable Manual Setup

Use as Portal Logon

User Principal Name

Authorize Directory Access

175 Click "Sign in to your account"



176 Click "Sign in to your account"

I accept, this app will get access to the specified resources for
ers in your organization. No one else will be prompted to
w these permissions.

enting these permissions means that you allow this app to use
data as specified in their terms of service and privacy
ment. **The publisher has not provided links to their terms**
ou to review. You can change these permissions at
://myapps.microsoft.com. [Show details](#)

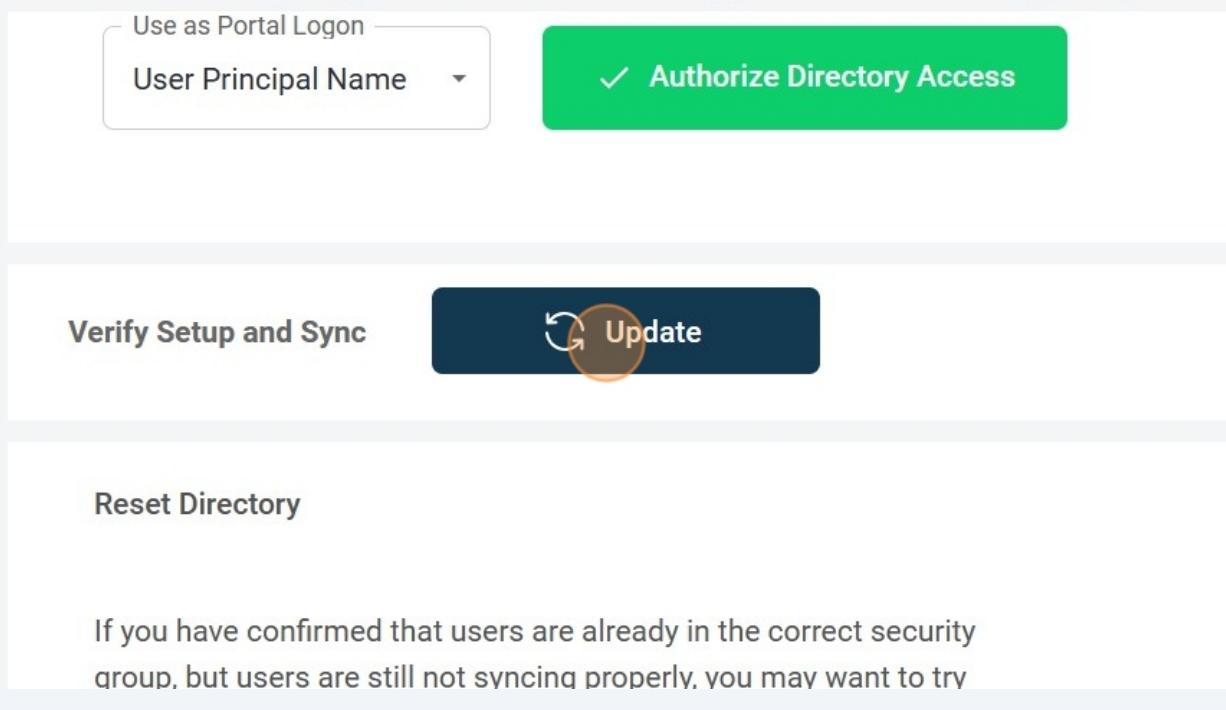
this app look suspicious? [Report it here](#)

Cancel

Accept



177 Click "Update"



178 Click "Sync Azure Now"

d BSN-ManagerAdmins: Group Not Found 

ct security
want to try

179 Click "Update"

User Management / Configure Directory Sync

Verify Setup and Sync

Update

BSN-Employees: Validated

BSN-Managers: Validated

BSN-ManagerAdmins: G

Reset Directory

180 Click here



Configure Directory Sync



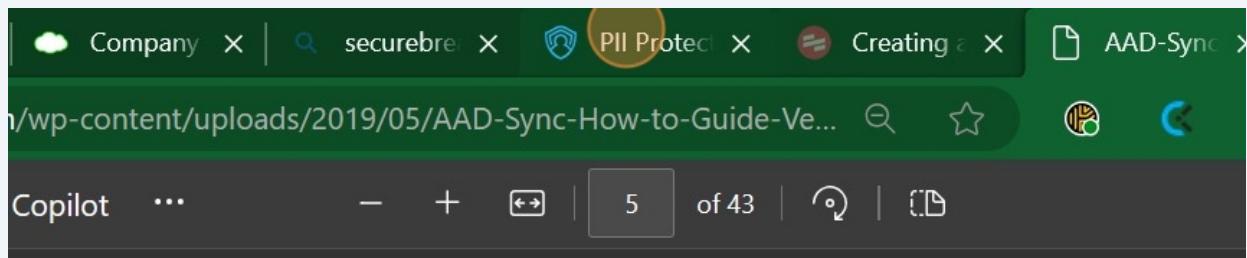
Update

Managers: Validated

BSN-ManagerAdmins: Group Not Found

Sync Azure Now

181 Click here

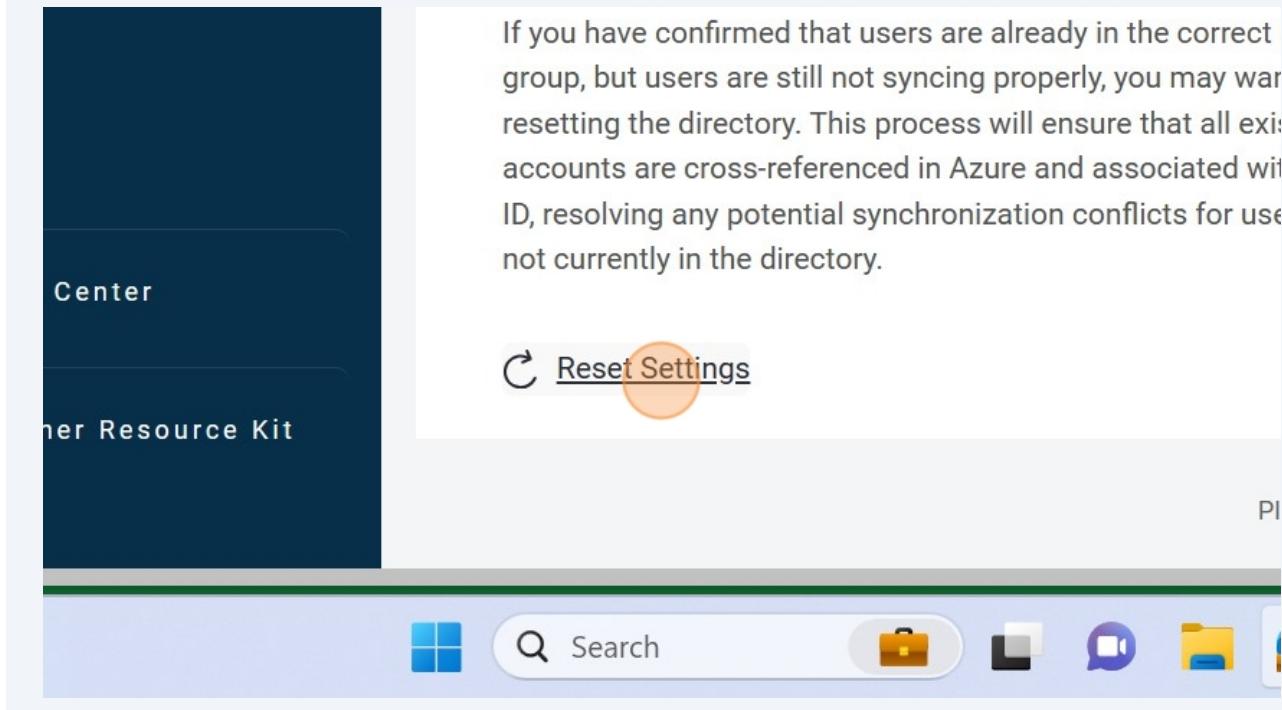


Azure Active Directory Sync Setup

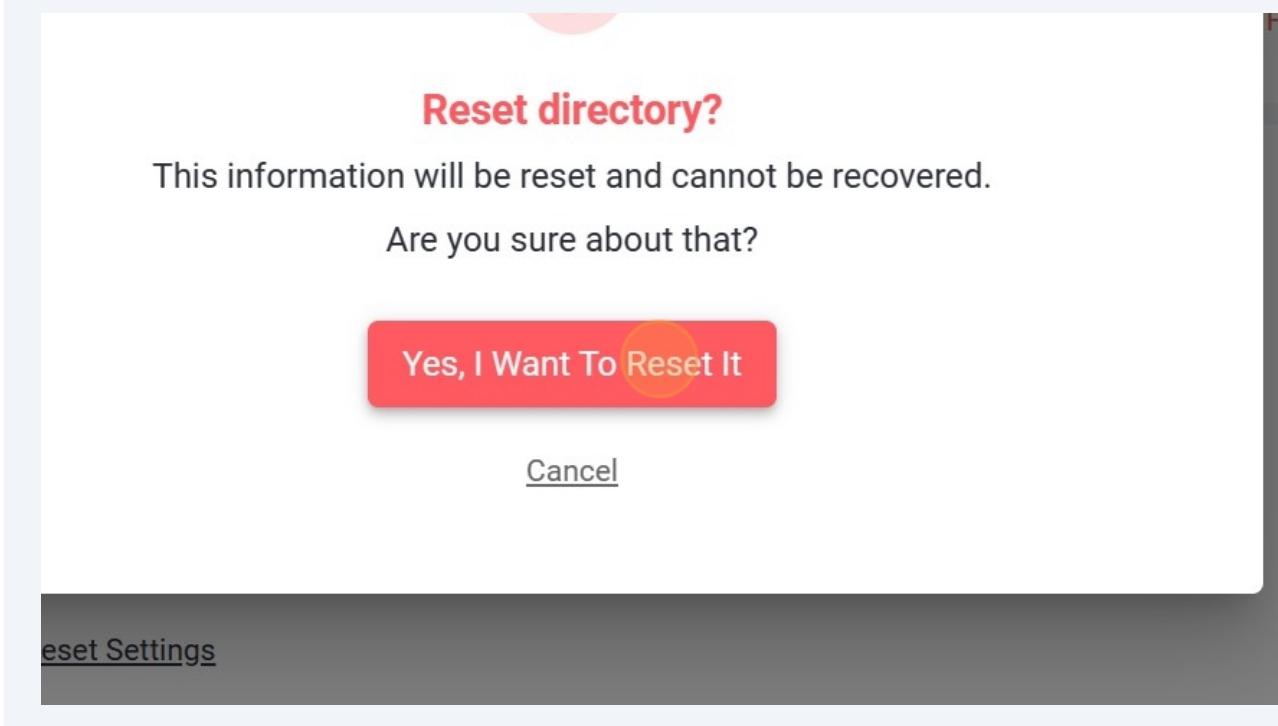
The Directory Synchronization feature allows you to manage users inside the PII/PHI Protect portal with ease. Integrate new or existing users as soon as they're in your client's system so they can get up to speed on cybersecurity, without ever leaving the portal.

1 Microsoft 365 Admin Center

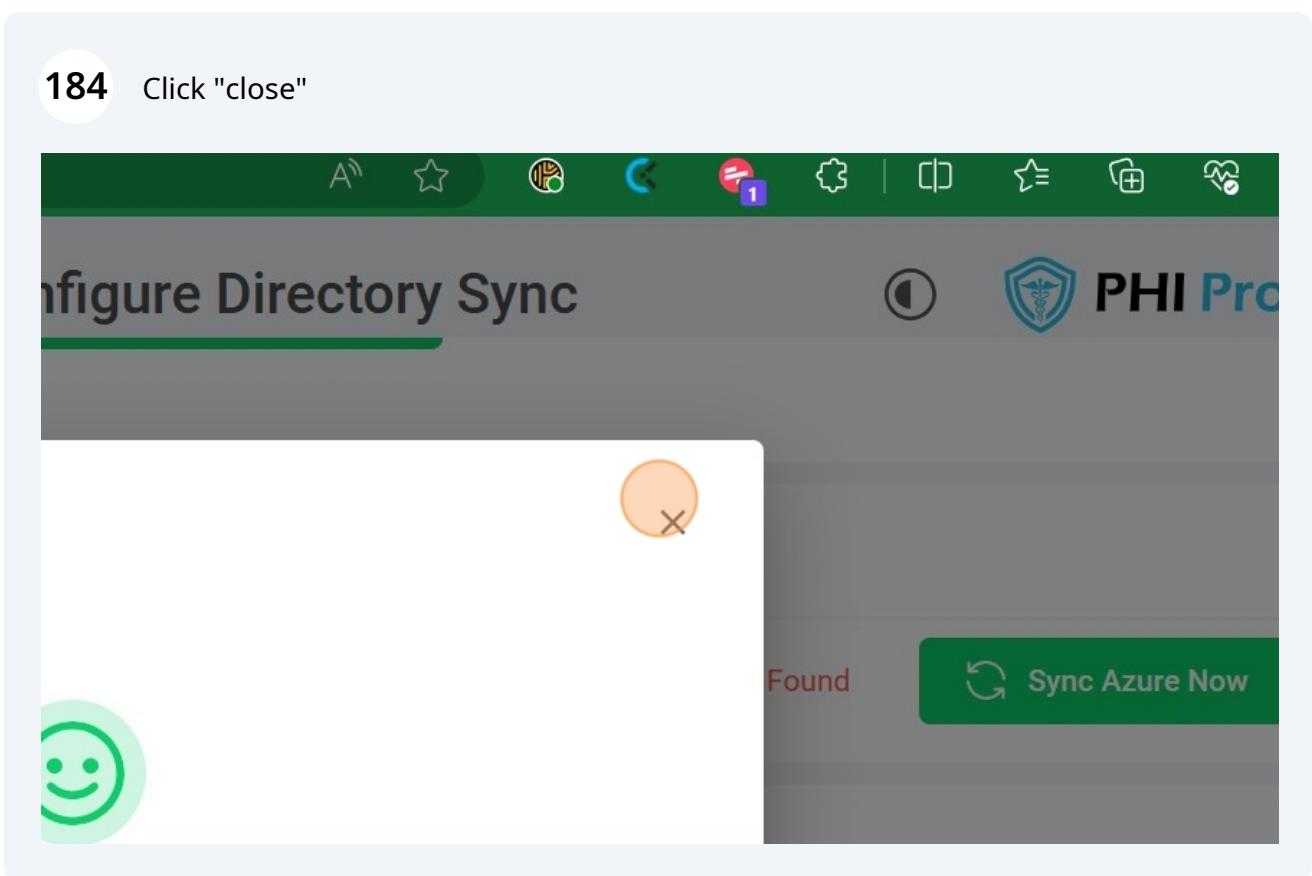
182 Click " Reset Settings"



183 Click "Yes, I Want To Reset It"



184 Click "close"



185 Click "Update"

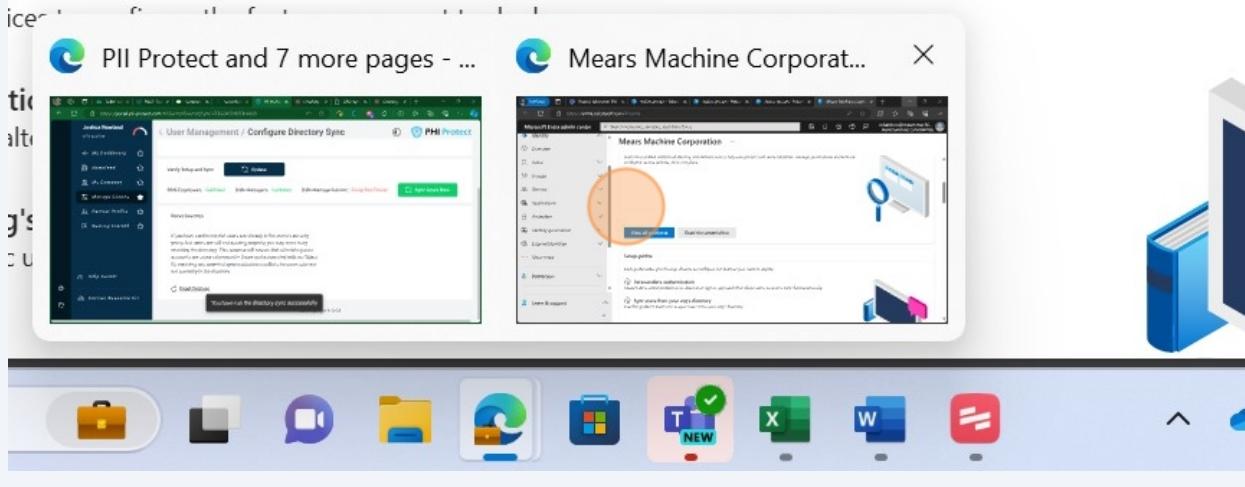
The screenshot shows a web browser interface with a green header bar containing a URL and several icons. Below the header, the main content area has a title 'User Management / Configure Directory Sync'. On the left, there's a link 'Verify Setup and Sync'. In the center, there are three status indicators: 'BSN-Employees: Validated' (green), 'BSN-Managers: Validated' (green), and 'BSN-ManagerAdmins: Group Not Found' (red). At the bottom, there's a 'Reset Directory' button. A large orange circle highlights the 'Update' button, which is located in a dark blue rectangular button below the status indicators.

186 Click "Sync Azure Now"

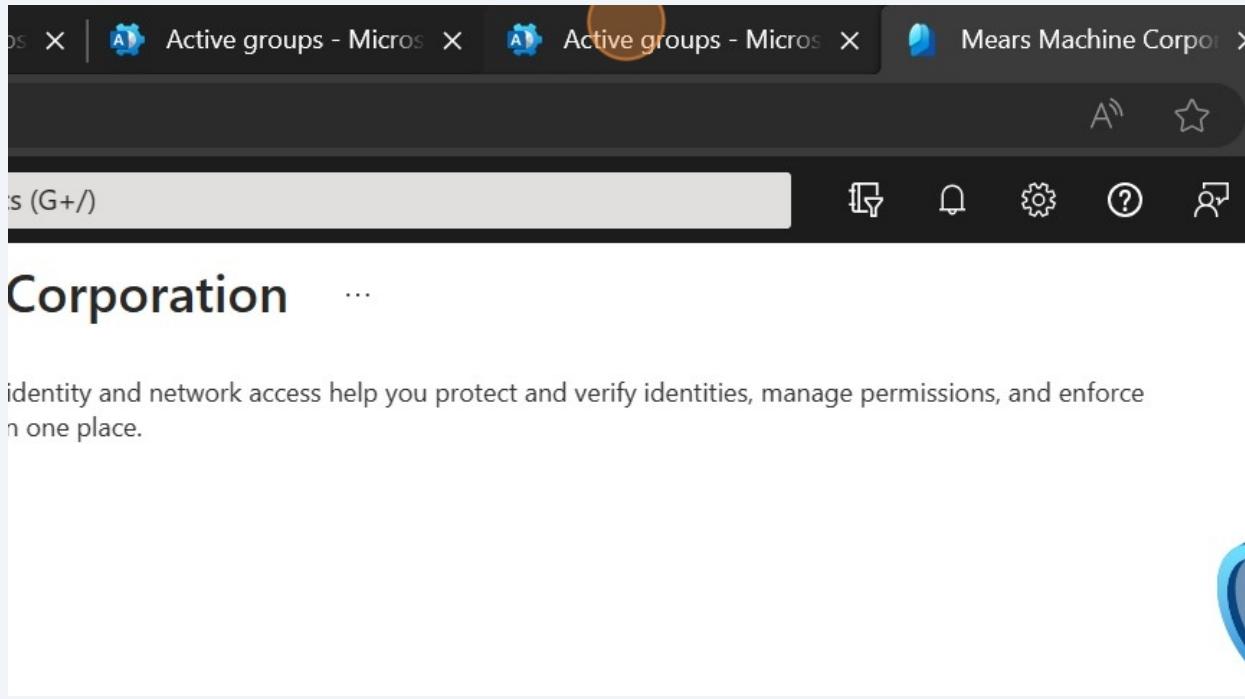
The screenshot shows a continuation of the previous page. It features a top navigation bar with various icons. Below it, a message 'd BSN-ManagerAdmins: Group Not Found' is displayed. Further down, there's a section with the text 'Protect security' and 'Want to try...'. A large orange circle highlights the 'Sync Azure Now' button, which is located in a green rectangular button at the bottom of the screen.

187 Click here

[Read documentation](#)



188 Click here



189 Click here

A screenshot of the Microsoft 365 Groups management interface. On the left, there's a sidebar with categories like 'Groups', 'Teams & groups', 'Groups', and 'Mailboxes'. The main area shows tabs for 'Microsoft 365', 'Distribution list', and 'Mail-enabled security'. Below these tabs is a toolbar with icons for 'Add a group' (highlighted with an orange circle), 'Export', 'Refresh', and 'Edit name'. A search bar labeled 'Name ↑' is followed by a list of groups: 'BSN-Employees' (with a checked checkbox) and 'BSN-Managers' (with an unchecked checkbox). Each group entry has a three-dot menu icon on the right.

190 Click here

A screenshot of a wizard or configuration step for creating a group. At the top, it says 'Creates an email address for a group of people.' Below this, there are two options: 'Mail-enabled security' (represented by an empty circle) and 'Security' (represented by a filled circle). The 'Security' option is highlighted with an orange circle. Below the options, there is descriptive text: 'Controls access to OneDrive and SharePoint and can 365.' At the bottom of the screen is a large blue 'Next' button.

191 Click here

Mail-enabled security

A distribution list that can also be used to control access to OneDrive and SharePoint.

Security

Controls access to OneDrive and SharePoint and can be used with Microsoft 365.

Next



Search



192 Click here

To get started, fill out some basic info about the group you'd like to create.

Name *

New group

Description

Enter a description for your new group

193 Click here

Name *

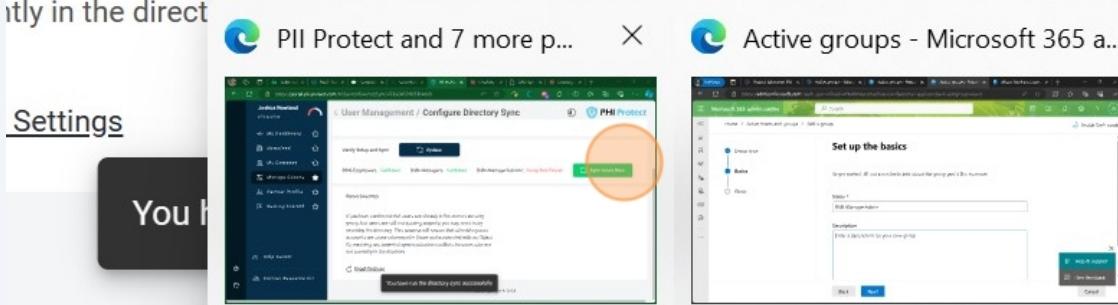
BSN-ManagerAdmin

Description

Enter a description for your new group

194 Click "Description"

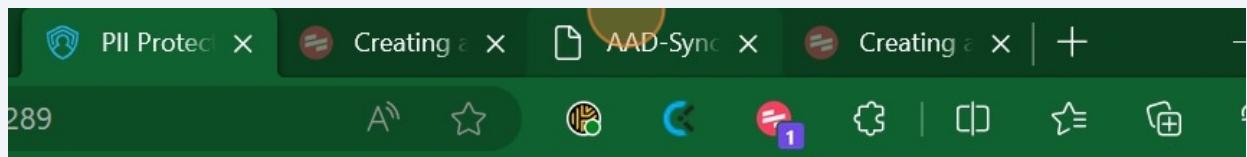
e confirmed that users are already in the correct security
: users are still not syncing properly, you may want to try
the directory. This process will ensure that all existing user
are cross-referenced in Azure and associated with an Object
ng any potential synchronization conflicts for users who are
ntly in the direct



ch



195 Click here



196 Click "PII/PHI Protect"

ter

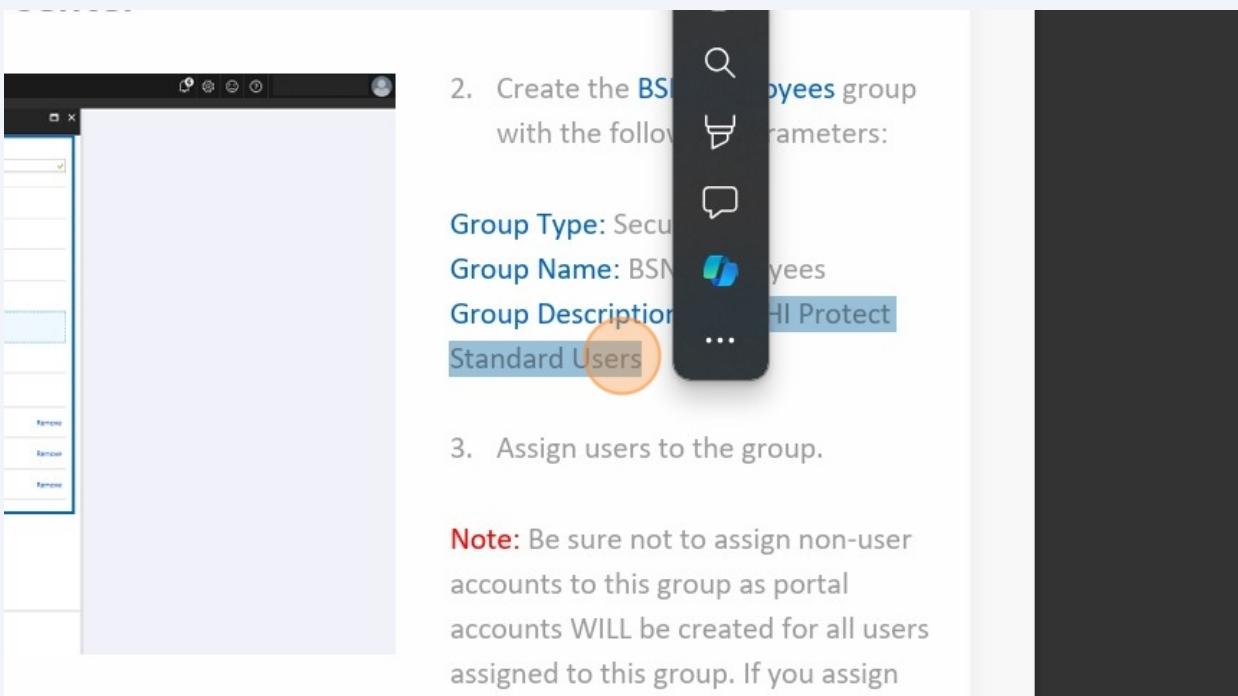
2. Create the **BSN-Employees** group with the following parameters:

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

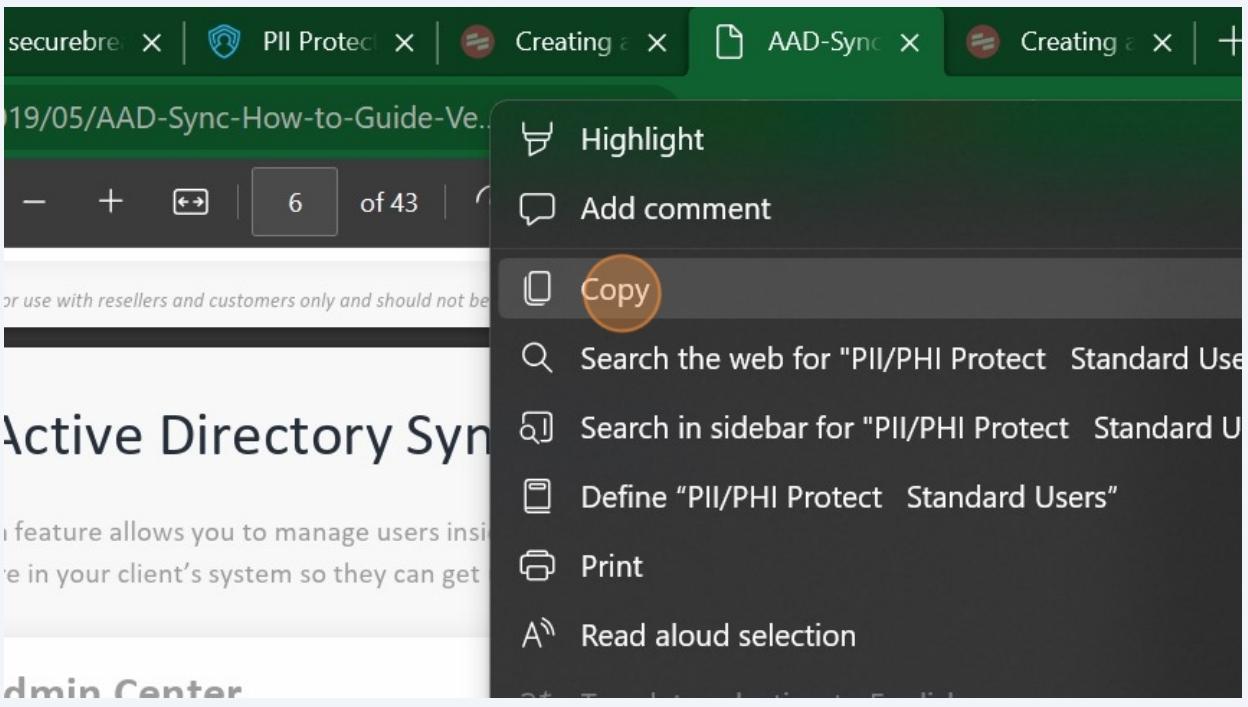
3. Assign users to the group.

Note: Be sure not to assign non-user accounts to this group as portal accounts WILL be created for all users

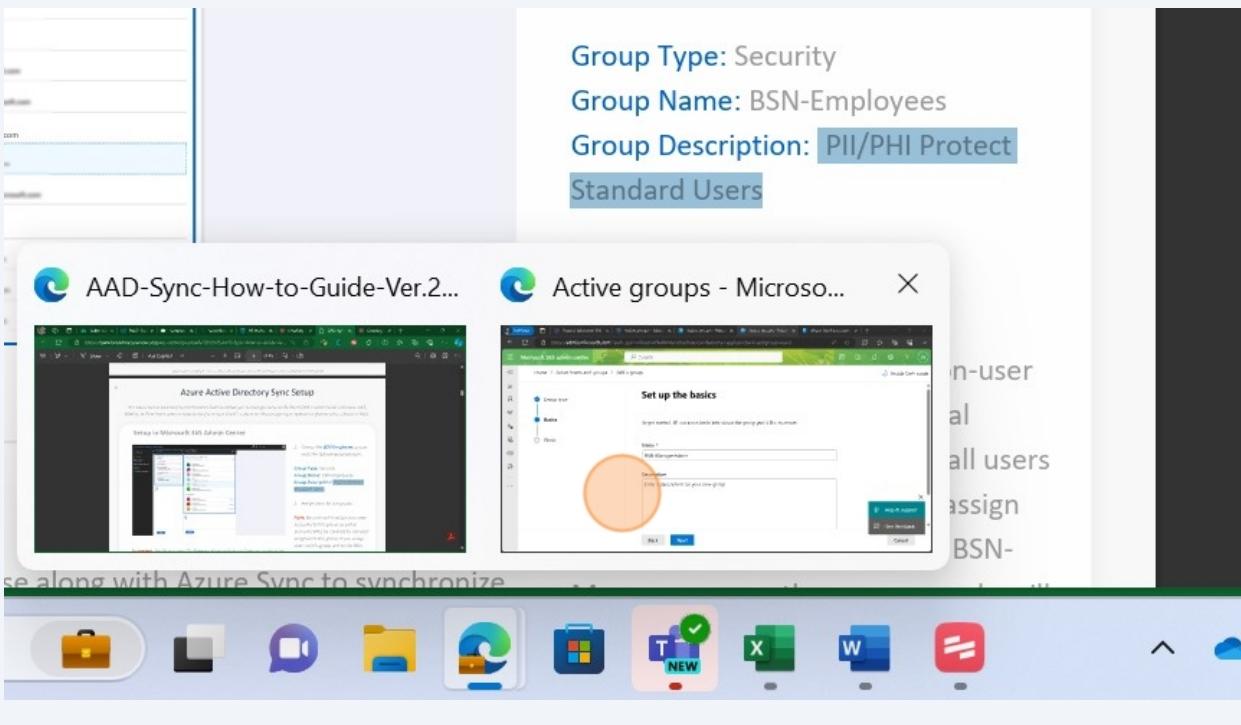
197 Right click here



198 Click "Copy"



199 Click here



200 Right click "Description"

Name *

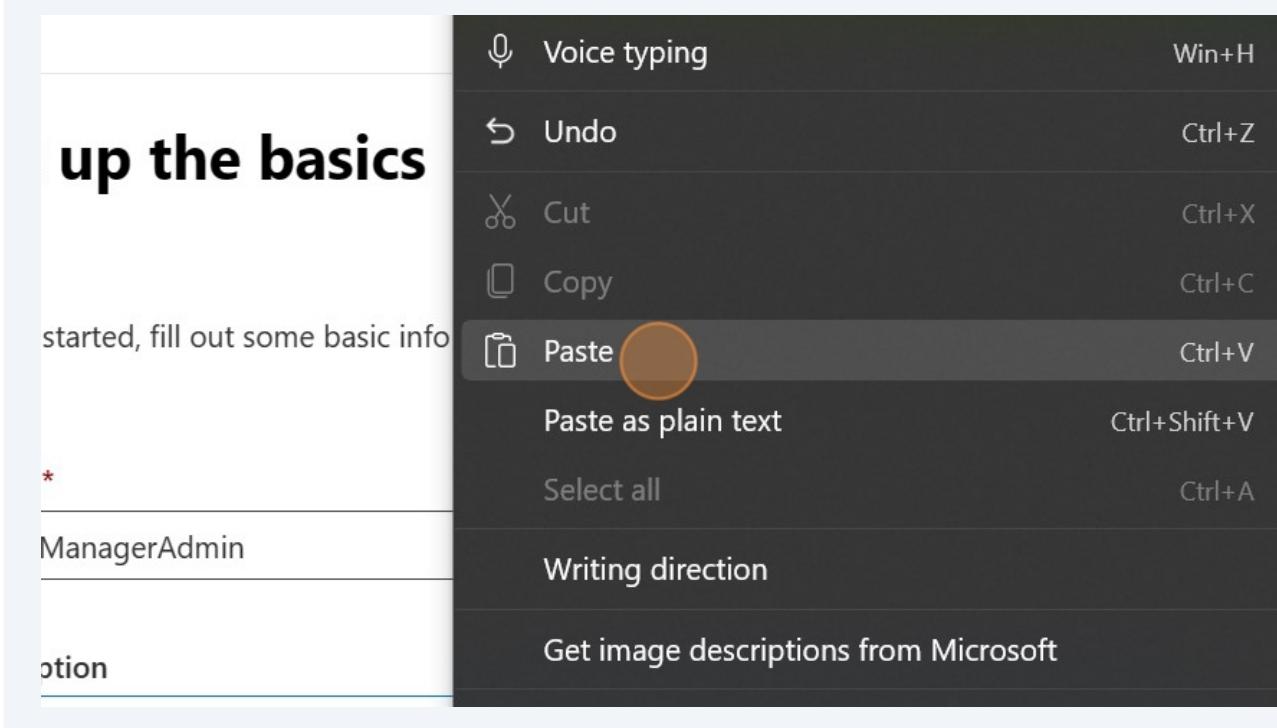
BSN-ManagerAdmin

Description

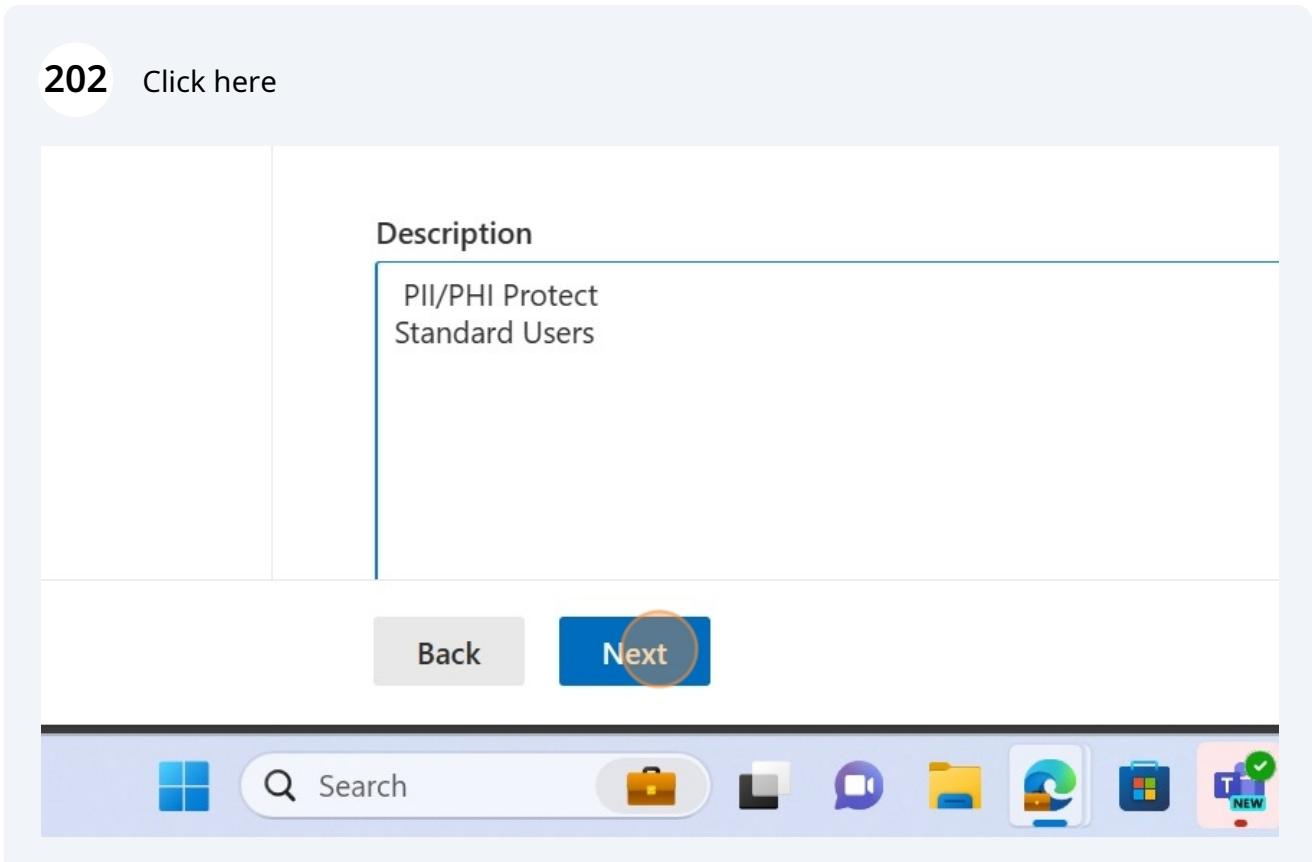
Enter a description for your new group

Back Next

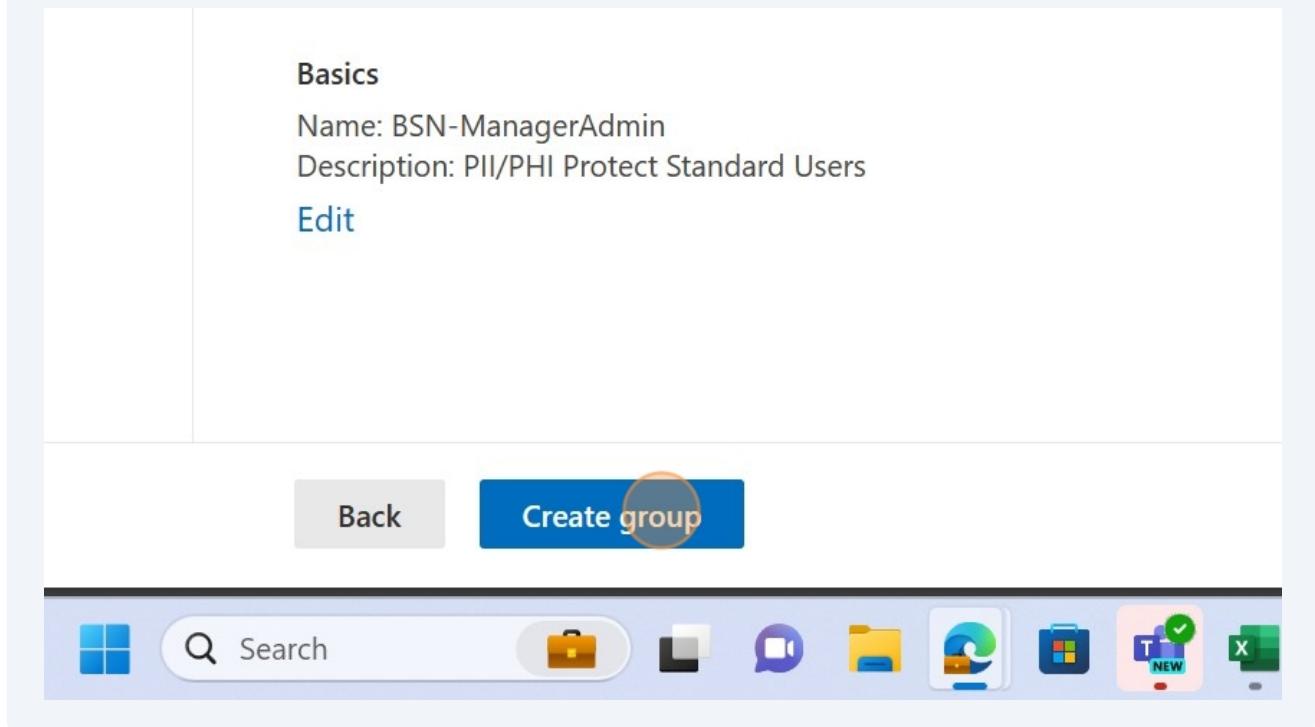
201 Click "Paste"



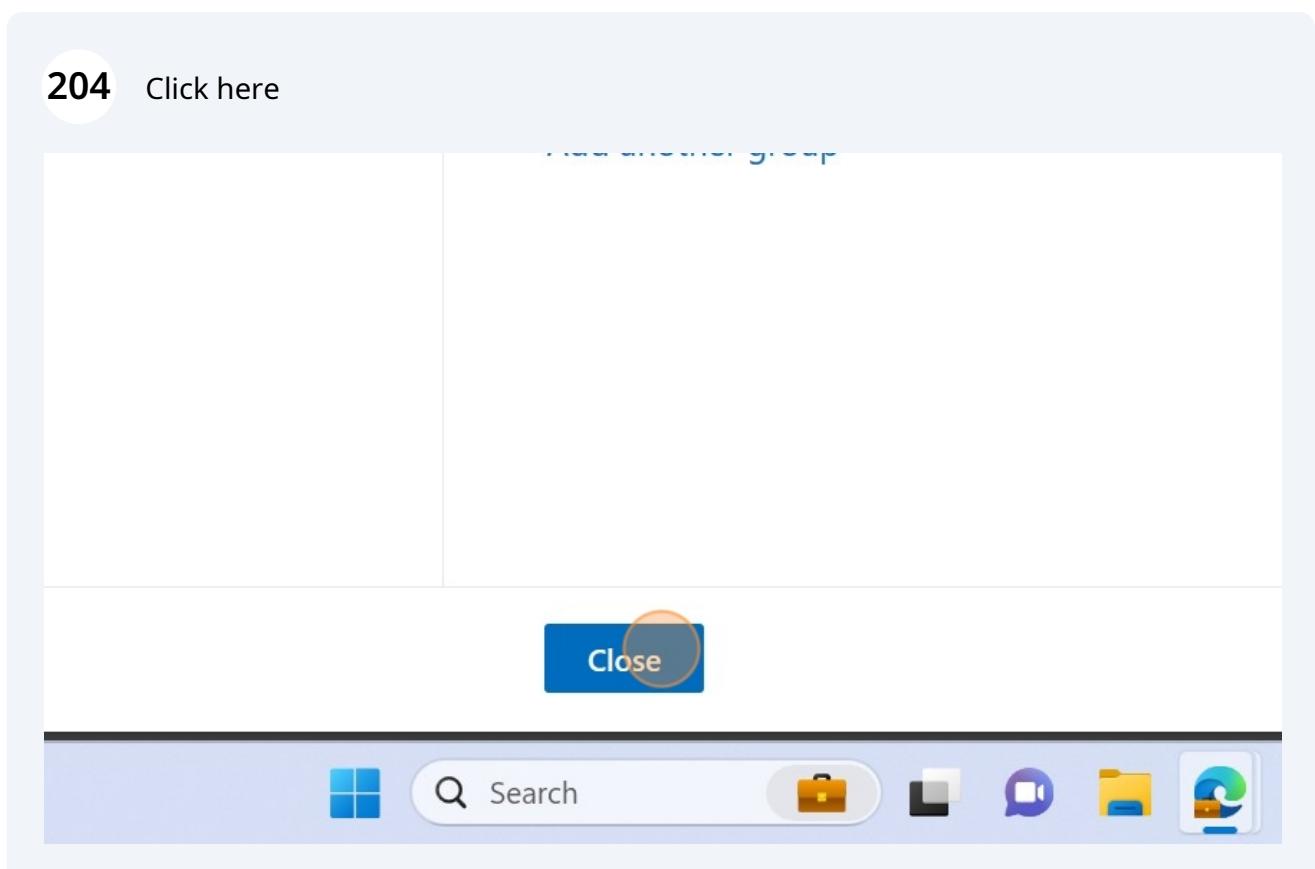
202 Click here



203 Click here



204 Click here



205 Click here

A screenshot of the Microsoft 365 Groups interface. On the left, there's a sidebar with collapsed sections like 'Teams & groups', 'Deleted groups', 'Archived mailboxes', 'Files', 'Sources', and 'Settings'. The main area has tabs at the top: 'About Groups', 'Using Teams And S', 'Microsoft 365' (which is highlighted with an orange circle), 'Distribution list' (also highlighted with an orange circle), and 'Mail-enabled security'. Below the tabs are buttons for 'Add a group', 'Export', and 'Refresh'. At the bottom, there are filters for 'Name ↑' and 'Email'.

206 Click here

A screenshot of the Microsoft 365 Groups interface, similar to the previous one but with a different URL in the address bar: //admin.microsoft.com/?auth_upn=initadmin%40microsoft.com&source=applauncher#. The main area shows the 'Distribution list' tab selected (highlighted with an orange circle). Other tabs include 'Microsoft 365', 'Mail-enabled security', and 'Security'. Below the tabs are buttons for 'Add a group', 'Export', and 'Refresh'. At the bottom, there are filters for 'Name ↑' and 'Email'.