



Breach Solutions Risk Management Site Set-Up and Training Manual

For Policyholders and OBLIC Staff

March 2026

Claims handling and breach response services are provided by Beazley USA Services, a member of Beazley Group. Beazley USA Services does not underwrite insurance for the Ohio Bar Liability Insurance Company. Policies purchased through the Ohio Bar Liability Insurance Co. are subject to the Ohio Bar Liability Insurance Co.'s underwriting processes.

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Introduction

Introduction

Your new Breach Solutions tool is an all-in-one cyber protection solution that equips your business with expert-led training modules and other features designed to enhance security awareness across your organization.

With Breach Solutions, you'll have access to a central admin dashboard, while your employees will each have their own staff portals. This guide walks you through every step to help you set up your account seamlessly.

Key Features

Training & education

You can set up risk assessments for your team, with actions tailored to their needs based on a quick cyber assessment. You'll also have the option to assign specific courses with video content and quizzes for employees to complete. In addition, they'll have access to trends, developments, and educational resources to further enhance their cybersecurity knowledge.

Phishing simulation

Our phishing simulator helps maintain vigilance across your organization by allowing you to schedule realistic phishing tests for employees. Choose from a variety of phishing templates, set up campaigns, and track employee performance to identify areas for improvement.

Policy management

Easily create, distribute, edit, activate, and manage company policies within the platform. Employees can access these policies anytime through their staff portal, ensuring they stay informed and compliant.

Procedures

Gain access to a library of downloadable procedure templates covering key compliance areas such as HIPAA, GDPR, and BCI. These resources help streamline your organization's cybersecurity and regulatory processes.

Admin Account & Set Up

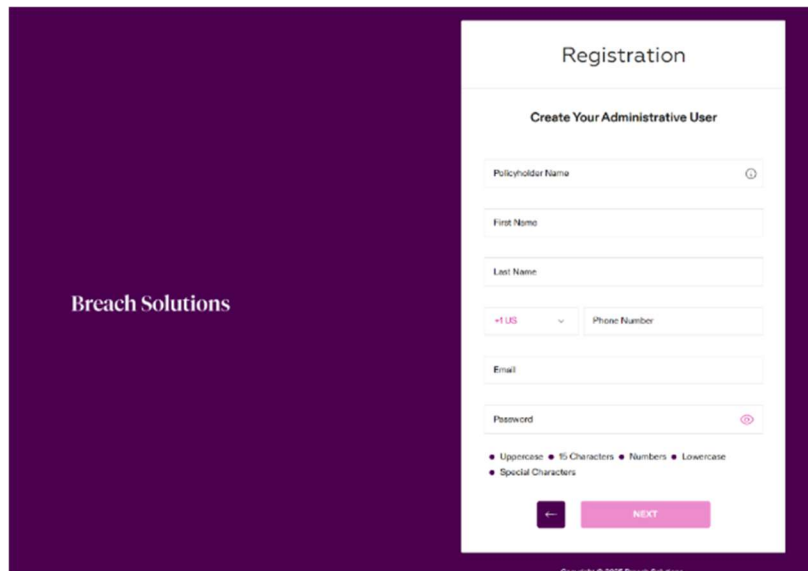
Registration & Activation

Accessing Breach Solutions is quick and simple.

Option 1:

When your legal professional liability policy with cyber response endorsement is issued by OBLIC, your underwriting representative will provide your firm with a link. This link is unique to OBLIC's license and available only to our policyholders.

*Registration screen when using **unique link** provided by OBLIC*

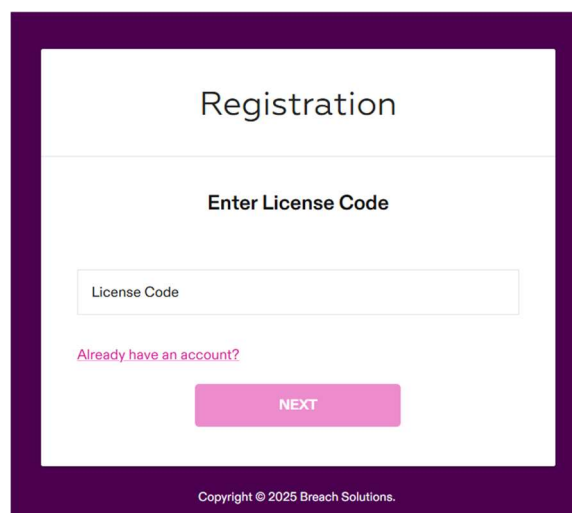


If you cannot locate the link provided by underwriting, contact Loss Prevention by emailing LossPrevention@OBLIC.com or call 614-488-7924 and ask for Loss Prevention.

Option 2:

Alternatively, you may be provided with a **license code** instead of the unique link. To use the **license code**, go to https://www.breachsolutions.com/en_US/signup and enter the **license code** when prompted, filling in your user details.


*Registration screen when entering **license code** provided by OBLIC*



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Please Note:

- This is for admin registrations only. Refer to page 31 for staff registration.
- Each email address can only be used to create one account.

 Please note: if you use a personal @gmail email address for admin registration, you will be unable to complete whitelisting, which means phishing simulation emails are likely to land in spam.

Setting Up Your New Account

Activating Your Account

- Once you've registered, you'll receive an activation email.
- Simply click the link in the email to verify your account and access the welcome screen.
- From there, click the 'Start' button and follow the on-screen steps to set up your account.

Setting Up Your Team


- At this stage, you'll have the option to:
- Add a list of staff email addresses via .CSV file
- Assign an additional administrative user to help manage the portal.
- Additional admin users will have the same admin privileges as the account owner, except they won't be able to manage user permissions.

1 Add Staff Emails

Add email addresses of staff members to send training guides and simulated phishing emails to.

2 Add Administrator

Add additional staff email addresses to send training material and simulated phishing emails to. Ensure you've whitelisted our systems to ensure the phishing emails reach your users. For more information on whitelisting, [click here](#).

 **UPLOAD .CSV**

If you'd prefer to do this later, you can skip these steps for now. You can always add staff emails or assign extra admin users at any time through the portal.

Whitelisting

Setting Up IP Whitelisting

What is Whitelisting?

To ensure the phishing simulator works effectively, you'll need to whitelist our IP address—and domains. This allows simulated phishing emails to be delivered to your staff's inboxes instead of being filtered into spam.

Whitelisting simply tells your email server that our sending domain is safe, ensuring our phishing templates are delivered directly to your company's inbox. Additionally, browser whitelisting may be required to ensure that when staff click on phishing test emails, they are directed to the correct landing pages without being blocked.

We've included links to our step-by-step guides on the next page. You can pass this information to your IT team, or if you use a managed services provider, they can set this up for you or assist with the process.



If this step isn't completed, your team may not receive the phishing test emails, reducing the effectiveness of the training.

Whitelisting Guides for Email

See these resources to learn more about Whitelisting for various email platforms and clients:

- [Google Workspace](#)
- [Microsoft Exchange 2013 and 2016](#)
- [Office 365 \(IP\)](#)
- [Office 365 \(Domain\)](#)
- [Gmail](#)
- [Whitelisting by Email Header](#)
- [Exchange Server 2019](#)

Whitelisting Guides for Web Browser

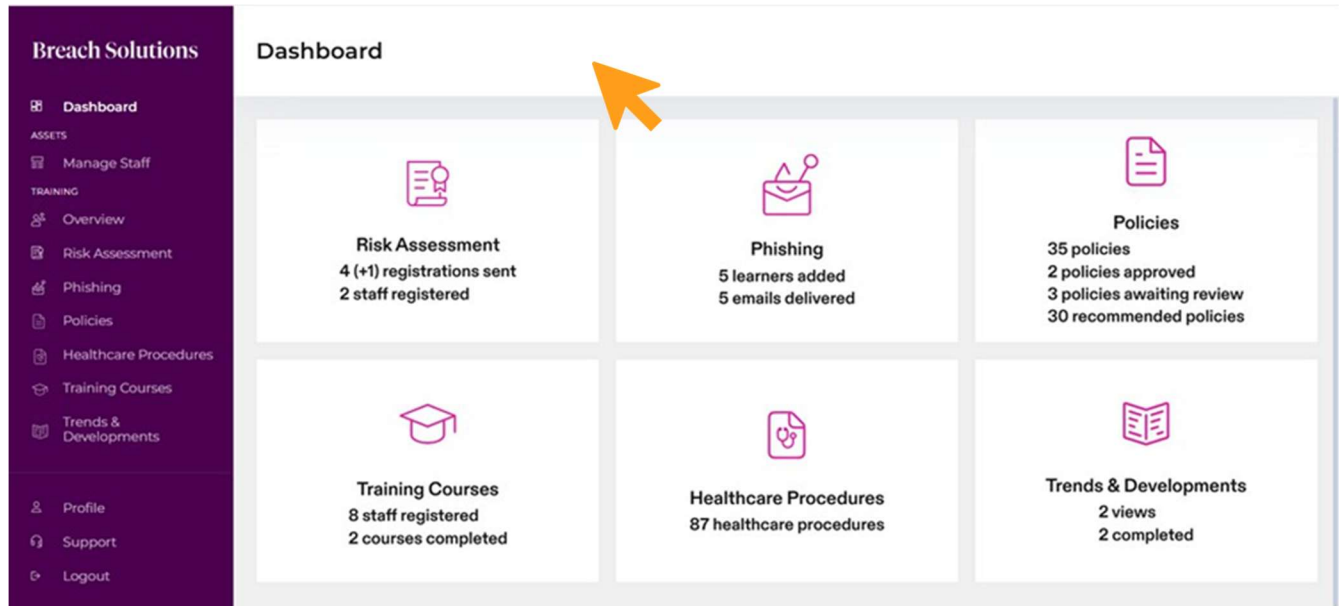
See these resources to ensure that the sending domain is recognized as safe by your browsers:

- [Google Safebrowsing \(Chrome\)](#)
- [Microsoft Edge](#)

Using Your New Dashboard

Overview

Welcome to your new dashboard! From here, you can access all the different modules by clicking on the squares. You can also navigate through them using the left-hand navigation bar.



Simply hover over the module you want to access, and you'll be taken to the main module screen. This dashboard view also provides a quick glance at overall progress and key statistics within each module.

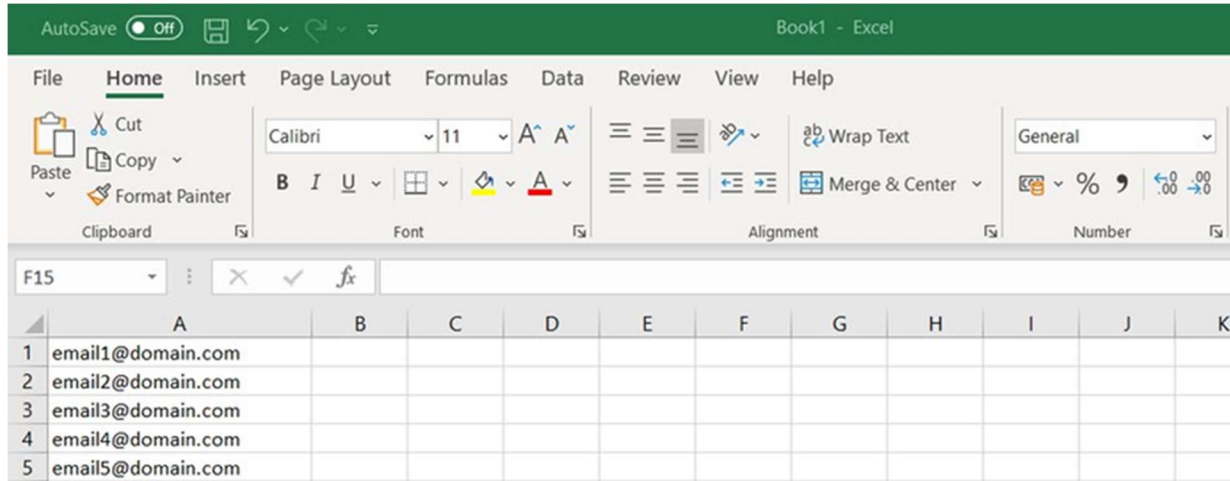
Adding Staff Emails

You can add staff email addresses to the system at any time, and these email addresses will receive invites for staff risk assessments/staff portal activation and will be sent phishing simulations. However, for employees to receive risk assessments or phishing, these modules must first be activated.

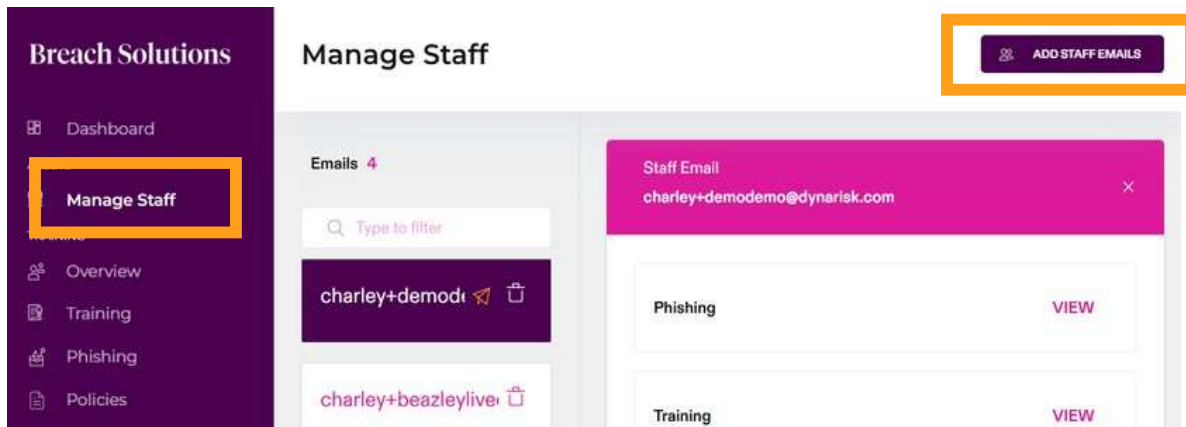
Once risk assessments or phishing are activated by the admin user, new email addresses will automatically receive their risk assessment invitations or future phishing campaigns once added to the system.

You can add new staff members by either typing in their email individually or by uploading a .CSV (Comma Separated Values) file.

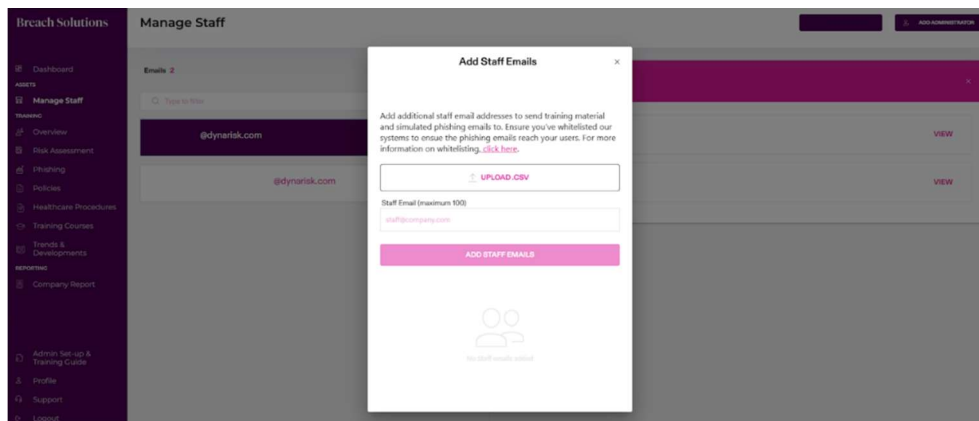
To upload your emails, please ensure they are in the correct format as shown below. The easiest way to do this is to open an Excel file, enter your emails, and then save it as a CSV.



Once you have formatted your file correctly, click on **‘Manage Staff’** on the navigation bar on the left.



Then, click **‘Add Staff Emails’** and upload your file, or type in the email.

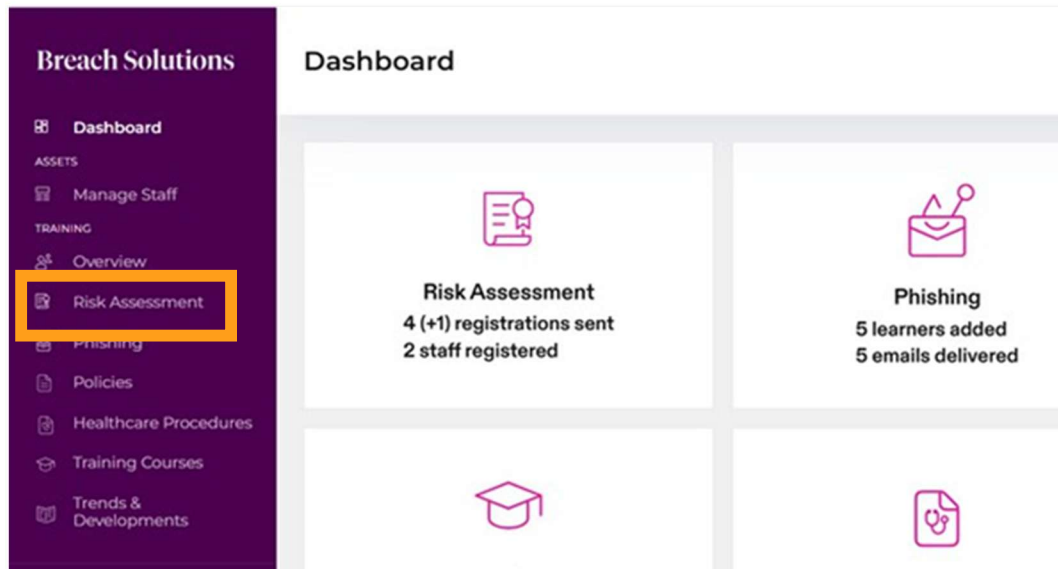


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Initiating Risk Assessments

Once you've added your staff email addresses to the account, you can initiate risk assessments for your team.

Simply click on the **'Risk Assessment'** tab and then the **'Start'** button to follow the guided steps.



Main Dashboard screen with tab options in left-hand navigation bar

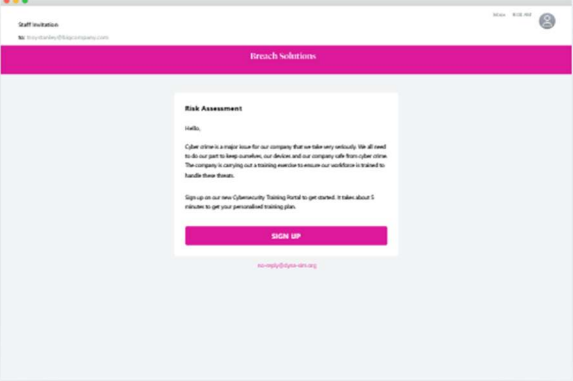
This activation will send an email to each staff member, inviting them to set up their accounts.

We recommend notifying your team via email in advance, so they know to expect the message and don't mistake it for spam.

Risk Assessment

- 1 Overview**
 - Invitation Email**

Staff will be sent an email invitation
 - Knowledge Assessment
 - Dashboard
 - Action Plan
 - Trends & Developments
- 2 Notify Staff
- 3 Test
- 4 Summary & Launch




NEXT

Any new staff members added to the system after risk assessments have commenced will automatically receive emails prompting them to activate their accounts and complete the risk assessment.

Monitoring Risk Assessments

Once the Risk Assessments have been activated, you can monitor the progress of employees at any time by visiting the ‘Risk Assessment’ module. The module will give you an overview of how each employee is progressing with their assessments and action plan.

Risk Assessment OPEN STAFF ACCOUNT

Staff	Cybersecurity Score	Given	Completed	Complete
 @dynarisk.com	000 / 999	0	0	0%
 @dynarisk.com	799 / 999	1	0	0%

The training score provides a quick overview of how cyber-safe an employee is, based on their risk assessment and training action plan. This reflects their cybersecurity score in their staff portal. You can also view the number of actions assigned to the employee, how many they have completed, and their completion rate.

For an overview of all actions that have been generated by the initial assessment, you can click on **‘Overview’**. This is a good way to gauge the common issues your employees are facing regarding their cyber knowledge or current practices.

Overview Search

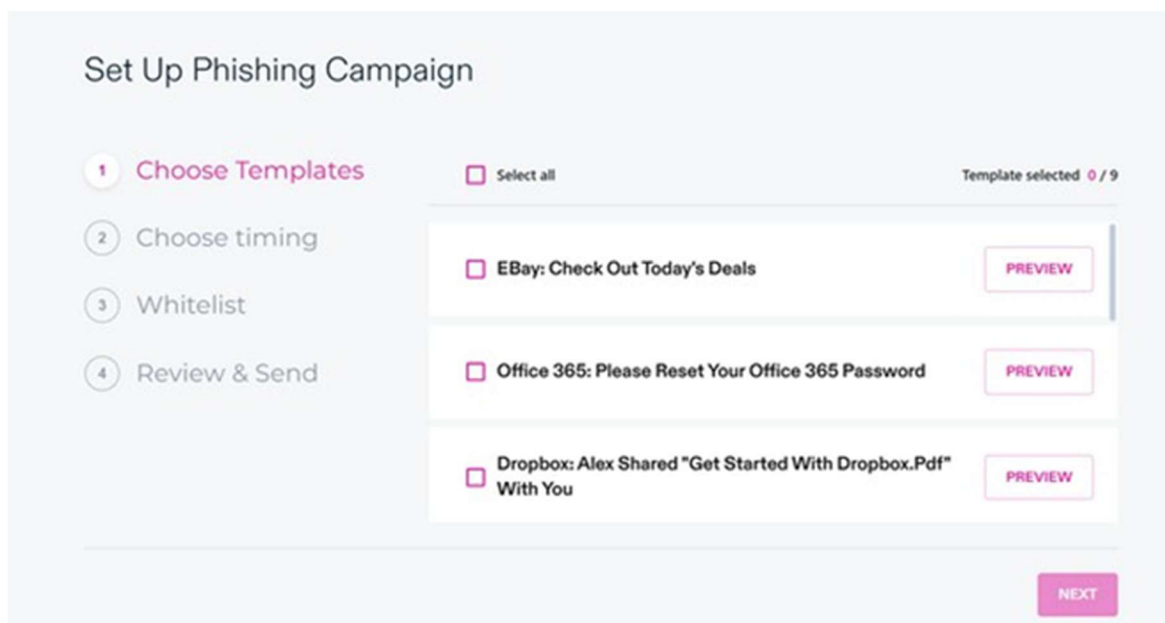
ACTION	ACTION PRIORITY	GENERATED	COMPLETED	COMPLETION RATIO
Spot Phishing Emails	high	1	0	0%

Phishing Simulation

The **phishing simulator** is an excellent tool for enhancing your staff's vigilance regarding email security. It encourages employees to adopt a mindset of analyzing emails before taking any action.

Our simulator offers a variety of **templates** that you can schedule for regular distribution to your team. These realistic-looking emails are designed to help employees identify the signs of phishing attempts. If someone accidentally clicks on a link or submits information, they will eventually be redirected to a landing page that alerts them.

Activating your phishing campaigns is simple. Just go to the **'Phishing'** tab in the left-hand navigation bar and follow the steps. You can select multiple templates, send yourself a test email, and choose when you'd like the campaign to be sent.



Process list to set up phishing campaign



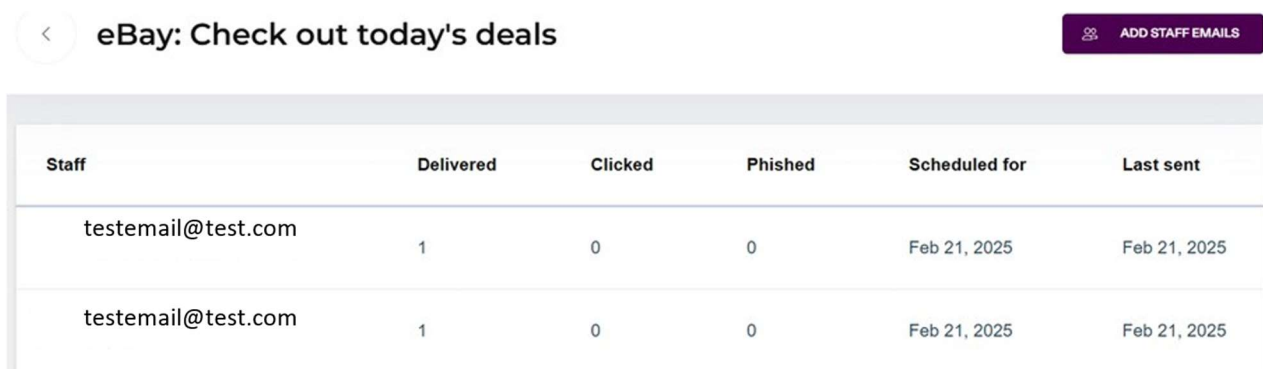
Remember! It's important to ensure whitelisting has been completed so that you and your staff receive these simulated phishing emails.

Tracking Phishing

Once phishing has been activated, you can head back to the 'Phishing' tab to monitor the progress of employees at any point.



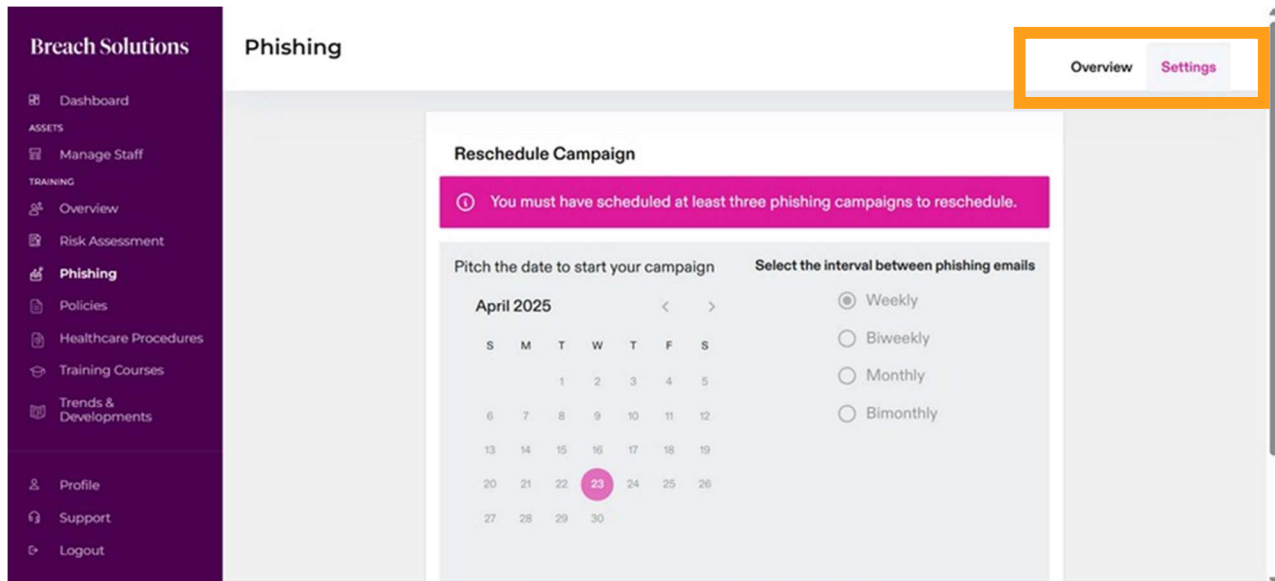
If you click on 'More Info,' you will see the details of which employees have accidentally interacted with the phishing template. "Clicked" indicates that an employee has clicked any link in the email, while "Phished" means they have submitted information that was captured on the associated landing page.



Staff	Delivered	Clicked	Phished	Scheduled for	Last sent
testemail@test.com	1	0	0	Feb 21, 2025	Feb 21, 2025
testemail@test.com	1	0	0	Feb 21, 2025	Feb 21, 2025

Amending Phishing Campaigns

If you need to reschedule or cancel a phishing campaign, simply click on the **'Settings'** tab in the main 'Phishing' overview.



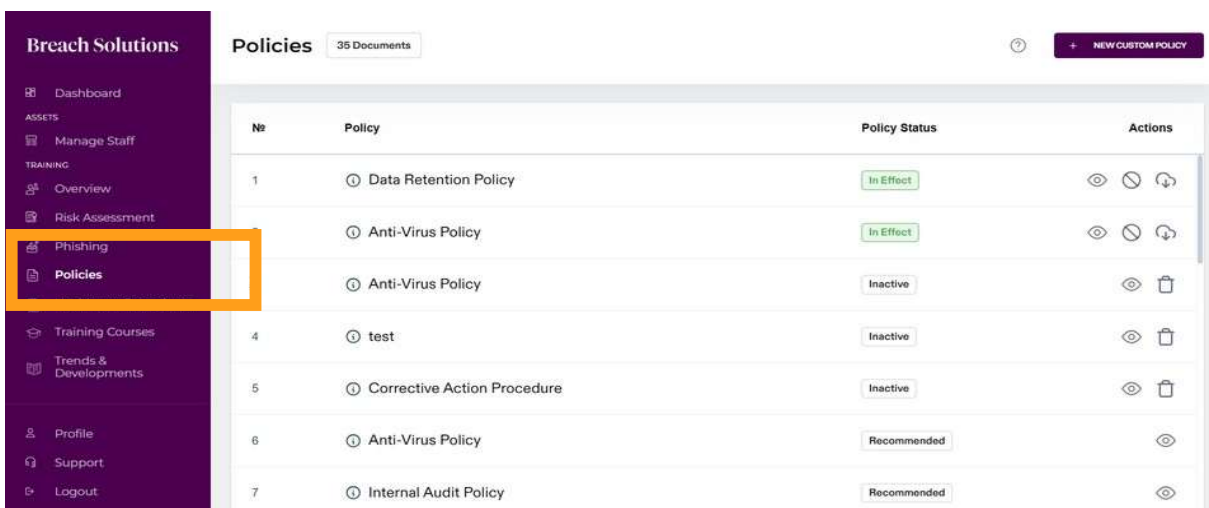
You can then reschedule your campaign by selecting a new date and hitting reschedule, or you can cancel the campaign altogether.

Note! You must have **at least three** phishing campaigns scheduled for future dates in order for you to be able to reschedule your campaigns.

Managing Policies

Establish and manage policies effortlessly with Breach Solutions. Simply navigate to the 'Policies' tab in the left-hand navigation bar to explore a variety of preloaded policy templates that can be edited. Or create your own custom policy and manage it through the Policies register.

Note! These are template documents. We recommend that you consult with legal counsel prior to implementation.

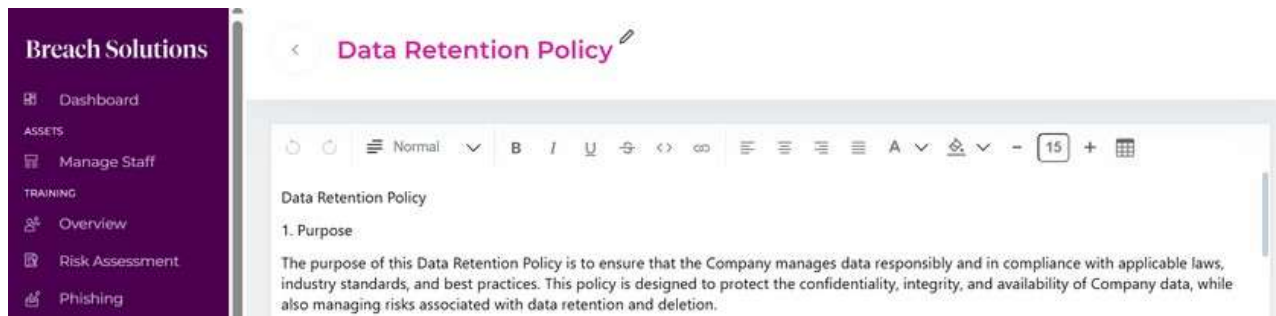


The tab will display all policies, allowing you to easily identify which ones are currently active (**In Effect**) and visible to employees in their staff portal. You can download, disable, or remove a policy at any time using the icons provided under the 'Actions' column.

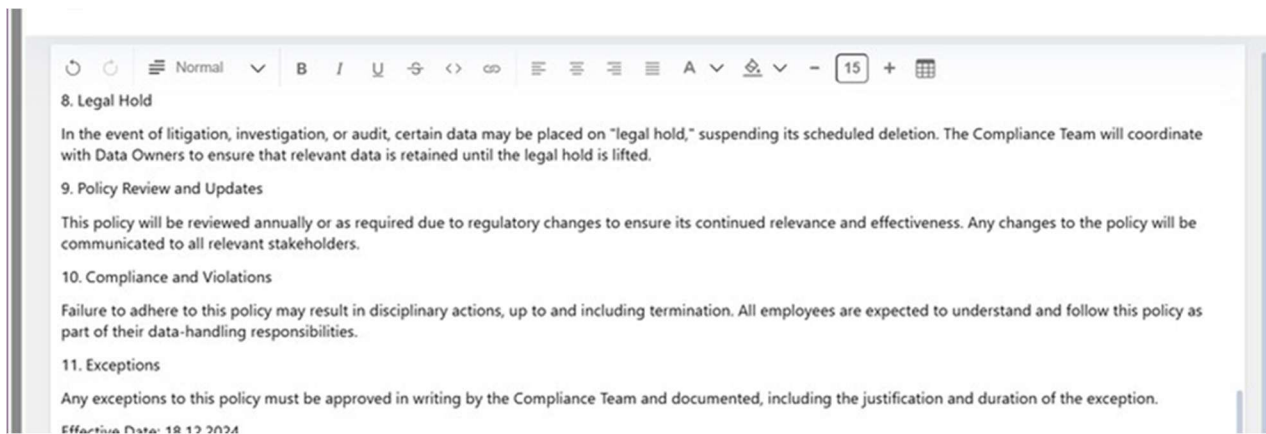


Activating and Creating Policies

To modify an existing template, simply click on it to access the editing screen, then select the ‘Edit’ option located at the bottom of the screen. Or if you want to create a new policy, press ‘New Custom Policy’ on the main screen.



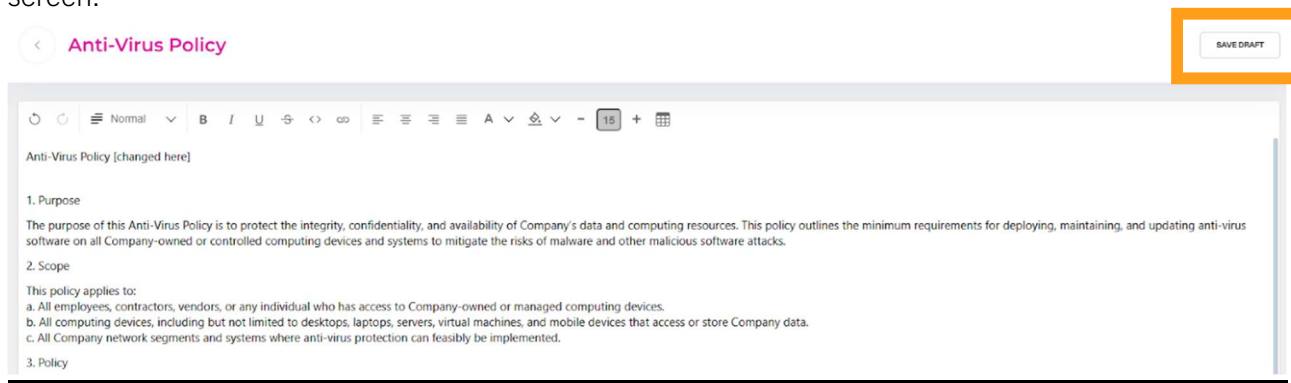
You will arrive at the editing screen, where you can make any necessary changes and include details such as who approved the policy and the date of approval.



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Publishing Policies

After making your amends or creating your policy, hit the **'Save Draft'** button at the top right of the screen.



Once you've saved a draft, you can 'Approve' the policy, or if you need to make further changes, just hit 'Save Changes' each time.



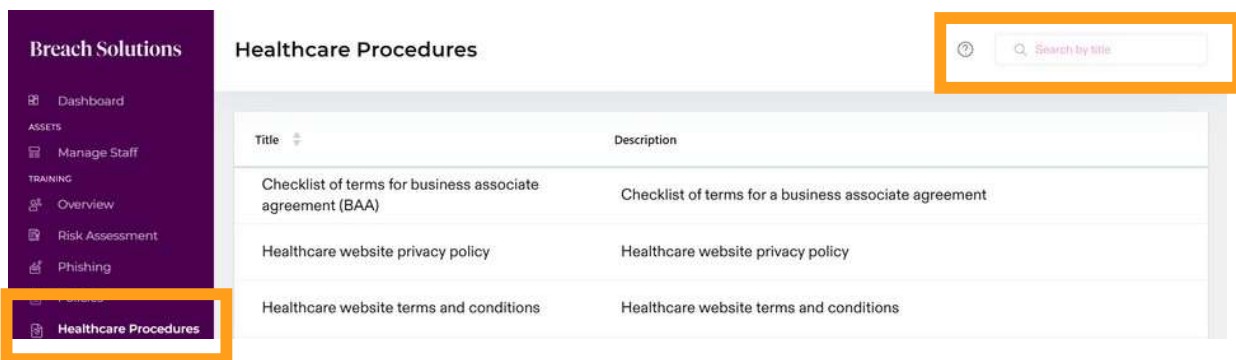
Once your policy is approved, you'll be able to see that this is **'In Effect'** in the main overview, which means employees will now be able to access this policy in their staff portal. As soon as new policies are added and approved, or changes are made and approved, employees will be emailed a notification.

Please be aware that the policy templates are a standardized collection located within the admin portal. ***These items serve as template documents, so we advise consulting with legal counsel before implementation.***

Healthcare Procedures

Our healthcare procedures tab in the left-hand navigation bar provides admin users with easy access to a variety of procedure templates for download. Just browse the available templates, select one, and click the download icon next to the desired item. To find a specific procedure, you can utilize the search bar located at the top right of the screen.

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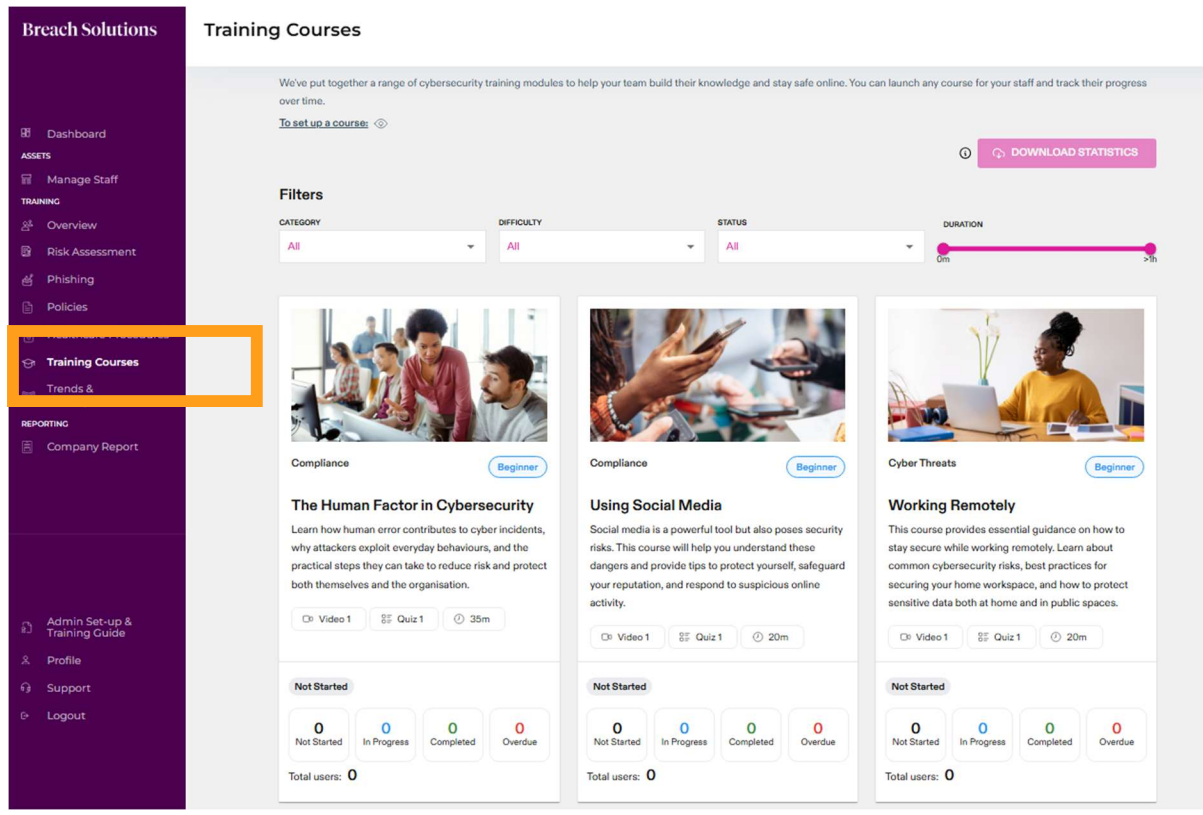


Please be aware that the procedure templates are a standardized collection located within the admin portal and are not editable. ***These items also serve as template documents, so we advise consulting with legal counsel before implementation.***

Furthermore, these templates are not accessible to staff members in their staff portal.

Training Course Overview

Our training courses aim to enhance employee development by providing specialized courses that build upon their risk assessment training. These courses address essential and comprehensive subjects using videos and quizzes. You can explore the range of available training courses and activate them for your team. The system will automatically send emails to the staff members once assigned, informing them of their assigned training courses using the email addresses already in the system. Employees will then be able to access the training course in their staff portals.



Breach Solutions Training Courses

We've put together a range of cybersecurity training modules to help your team build their knowledge and stay safe online. You can launch any course for your staff and track their progress over time.

[To set up a course:](#)

[DOWNLOAD STATISTICS](#)

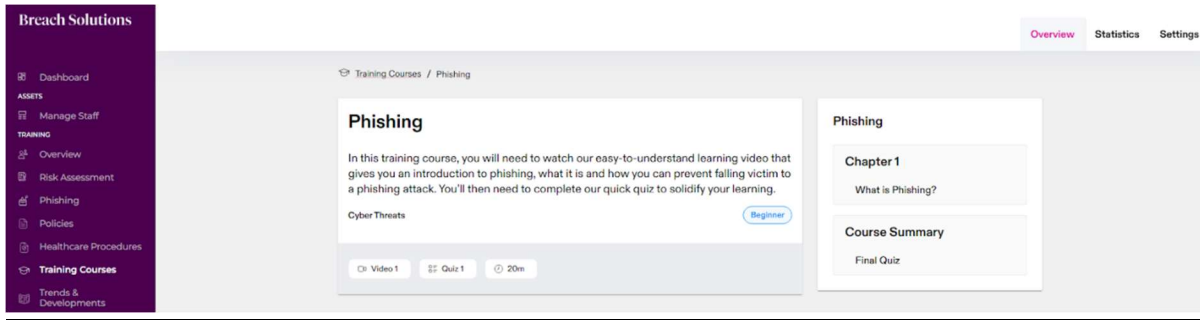
Filters

CATEGORY: All | DIFFICULTY: All | STATUS: All | DURATION: 0m - >h

Course Title	Category	Difficulty	Status	Duration	Not Started	In Progress	Completed	Overdue	Total users
The Human Factor in Cybersecurity	Compliance	Beginner	Not Started	35m	0	0	0	0	0
Using Social Media	Compliance	Beginner	Not Started	20m	0	0	0	0	0
Working Remotely	Cyber Threats	Beginner	Not Started	20m	0	0	0	0	0

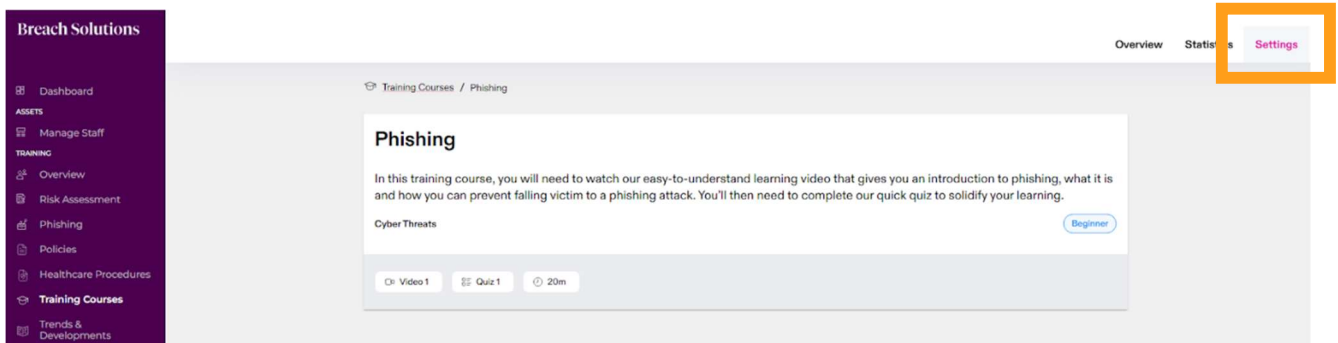
Assigning Training Courses

To assign a training course to employees, you first need to access the training course dashboard and choose the specific course you wish to assign.



Once you've clicked into a course, you'll be able to view all of the content, including the videos and quizzes. The quiz questions are prepopulated in the admin portal, allowing admin users to see the correct answers. Please note that the content of these courses cannot be amended.

Next, head to the 'Settings' tab at the top right of the screen on the training course you want to assign.

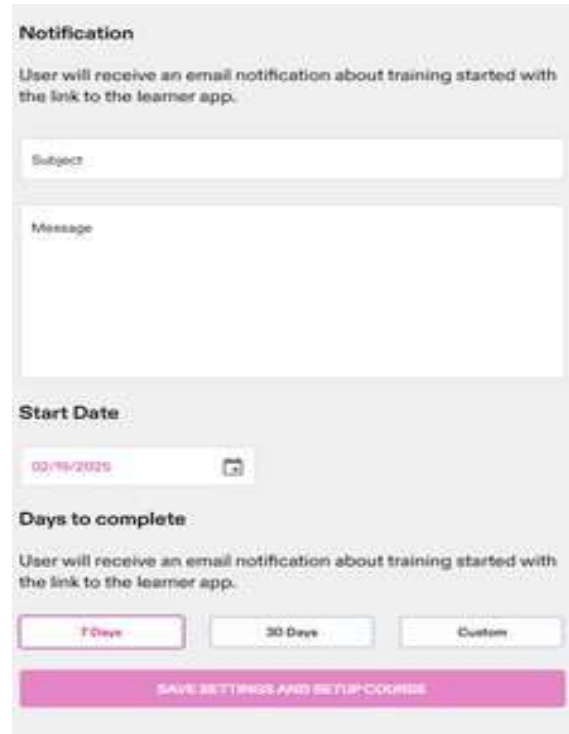


In the settings, scroll down to fill in the necessary details for assigning the course.

Here, you can choose the start date, specify the number of days the user has to complete the course, and enter a message that will be emailed to staff members to notify them of the new course assignment.

Please allow 10 minutes for training course to activate.

Note! Before a future training course begins, the admin user will be able to amend the course settings. However, once this is active, settings cannot be changed.



Notification
User will receive an email notification about training started with the link to the learner app.

Subject: _____

Message: _____

Start Date
02/19/2025

Days to complete
User will receive an email notification about training started with the link to the learner app.

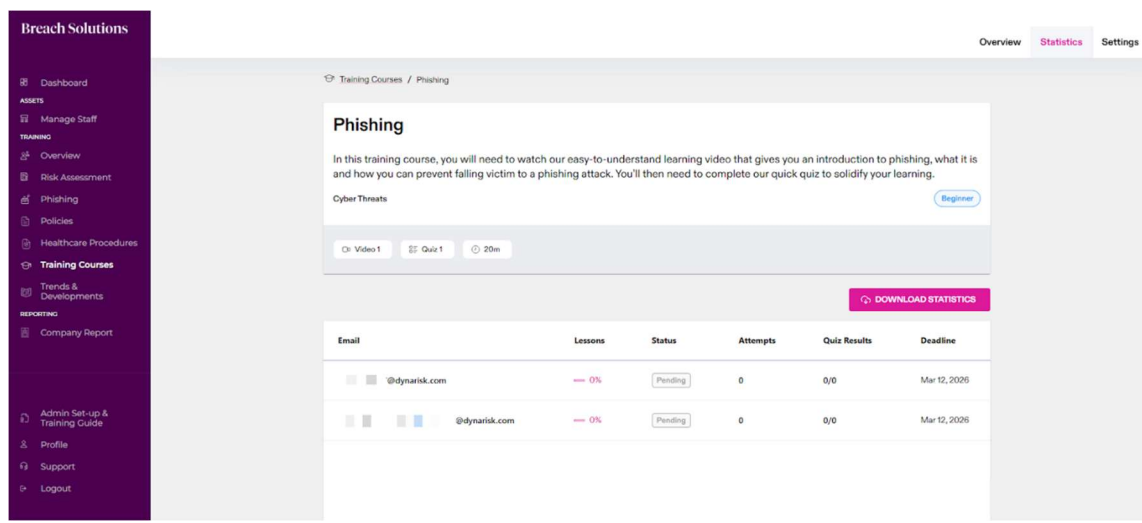
1 Days 30 Days Custom

SAVE SETTINGS AND SETUP COURSE

Monitoring Training Courses

Once your training courses are successfully activated, you will be able to see this in the course settings.

You'll be able to monitor the progress of employees at any stage by pressing the **'Statistics'** tab in the course overview screen. If an employee fails the course, they will need to retake it. They will be required to complete all of the video chapters again to be able to retake the quiz. They will be able to begin rewatching the videos immediately, however, they will only be able to reattempt the quiz after 16 hours following the first quiz completion. The admin user will be able to view total attempts, and quiz results in the **'Statistics'** screen. Admin users can also download statistics if required.



Breach Solutions

Dashboard / Training Courses / Phishing

Phishing

In this training course, you will need to watch our easy-to-understand learning video that gives you an introduction to phishing, what it is and how you can prevent falling victim to a phishing attack. You'll then need to complete our quick quiz to solidify your learning.

Cyber Threats [Beginner](#)

Video 1 Quiz 1 20m

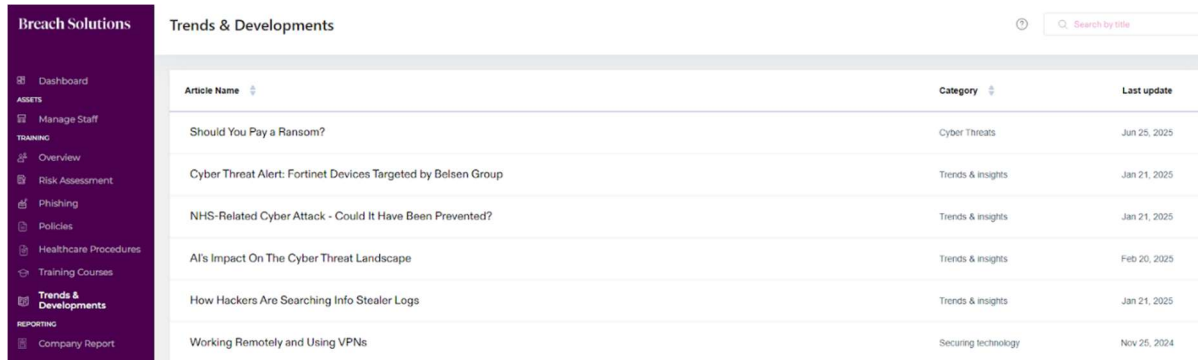
[DOWNLOAD STATISTICS](#)

Email	Lessons	Status	Attempts	Quiz Results	Deadline
@dynamrisk.com	0%	Pending	0	0/0	Mar 12, 2025
@dynamrisk.com	0%	Pending	0	0/0	Mar 12, 2025

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Trends and Developments

The ‘Trends & Developments’ tab provides your employees with a continuously updated library of cybersecurity content and insights to enhance their knowledge. This section serves as a valuable learning hub from guides and best practices to the latest trends and developments in the cybersecurity landscape. It complements their action plans (generated by the initial risk assessment) and training courses, offering extra materials to help them stay informed and proactive against cyber threats.



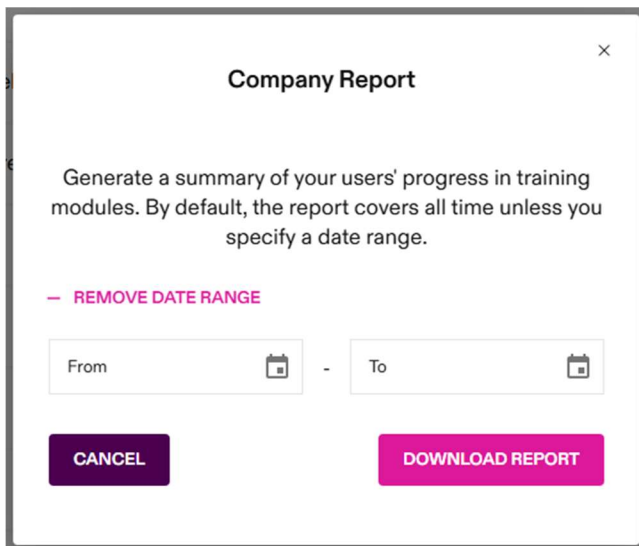
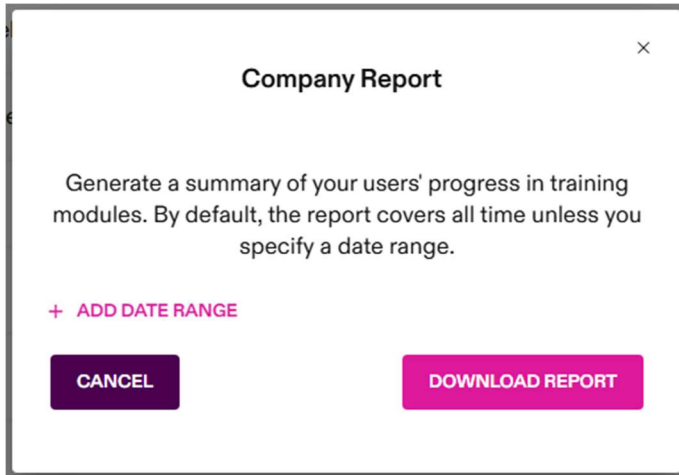
Article Name	Category	Last update
Should You Pay a Ransom?	Cyber Threats	Jun 25, 2025
Cyber Threat Alert: Fortinet Devices Targeted by Belsen Group	Trends & insights	Jan 21, 2025
NHS-Related Cyber Attack - Could It Have Been Prevented?	Trends & insights	Jan 21, 2025
AI's Impact On The Cyber Threat Landscape	Trends & insights	Feb 20, 2025
How Hackers Are Searching Info Stealer Logs	Trends & insights	Jan 21, 2025
Working Remotely and Using VPNs	Securing technology	Nov 25, 2024

Please be aware that these resources are not set by the admin, and articles cannot be edited.

Company Report

The Company Report provides a quick and easy way to generate a downloadable overview of employee performance across the platform.

Simply select the report to download year-to-date statistics or apply a custom date range to view performance for a specific period in time.



This report offers a holistic view of engagement across your organization, helping you understand how employees are interacting with the system and making progress with their assigned activities.

Admin Set-Up & Training Guide

The Admin Set-Up & Training Guide is a conveniently accessible version of this manual, hosted directly within the portal for easy reference at any time.



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Changing Account Details

In the 'Profile' tab, you can change details relating to your account. 'Admin details' enables you to change basic admin information. Please note that the account owner has access to all settings in the tab. However, additional admin users will not be able to access the 'Add Administrator' tab.

Profile

Admin Details Add Administrator Password

First Name

Last Name

+1 US Phone Number

Email @dynarisk.com

SAVE CHANGES

If you wish to change your password, you can do so by hitting the 'Password' tab.

Profile

Admin Details Add Administrator Password

Old Password

New Password

Confirm New Password

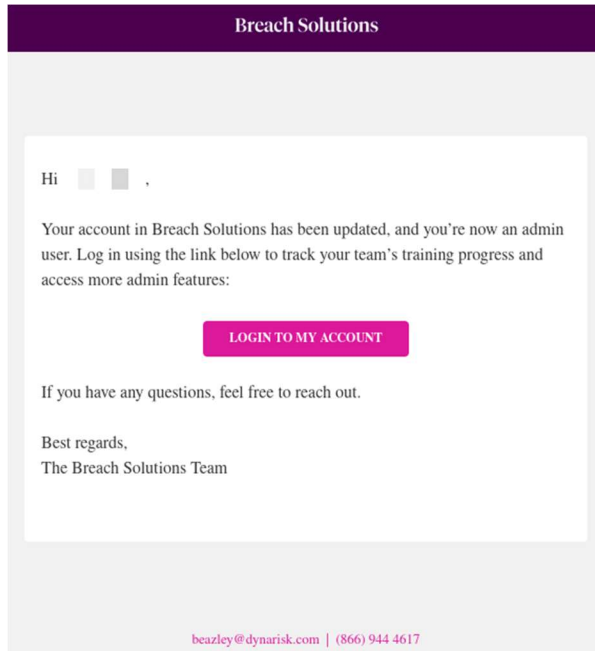
- Uppercase
- 15 Characters
- Numbers
- Lowercase
- Special Characters

SAVE CHANGES

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Adding New Admin Users

To give new users admin access, simply head to the ‘Manage Staff’ section and press ‘Add Administrator’.



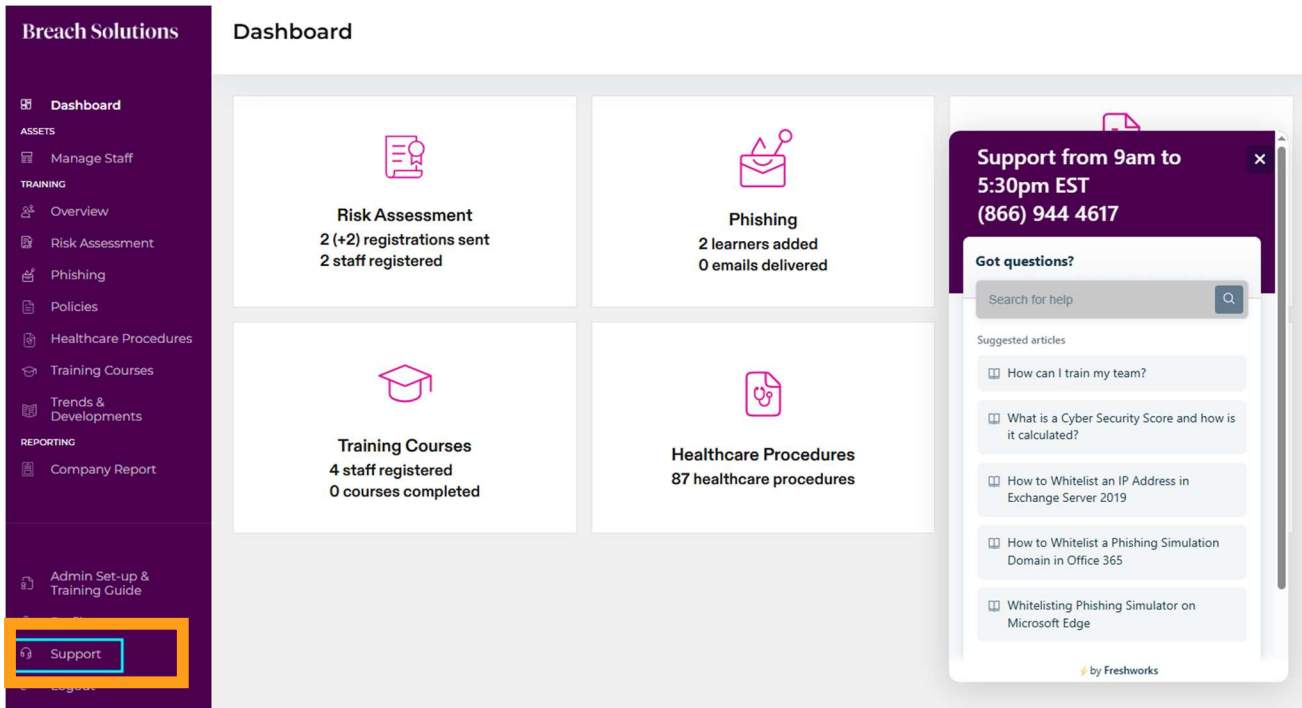
The user will then receive an email notification to alert them that they have been granted admin permissions. If they already have an existing account, they can use their staff account credentials to login to the admin view. If they are not an existing user, they will need to set up an account.



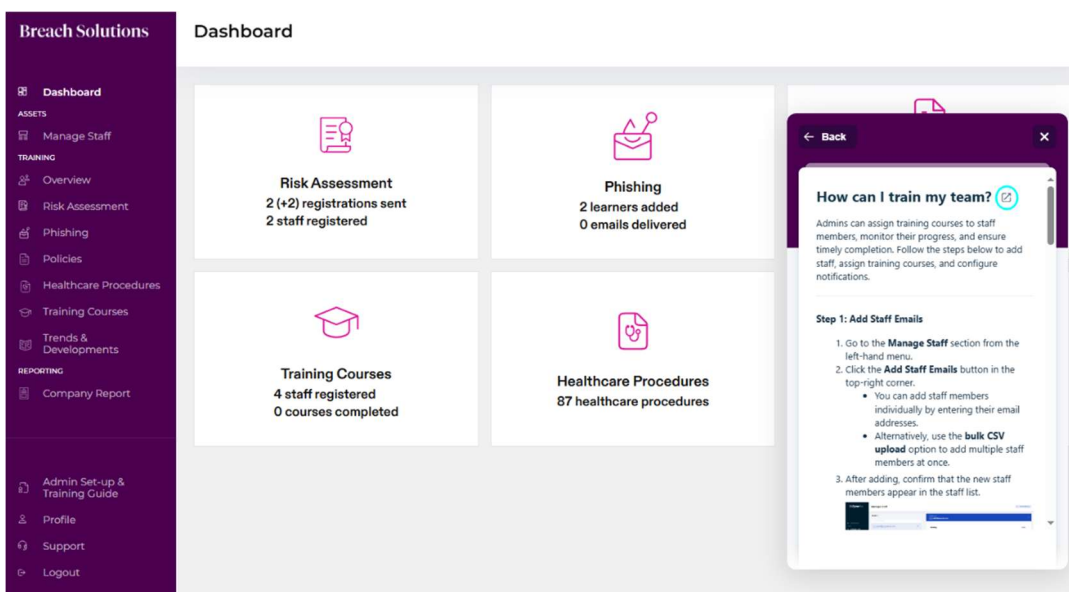
Note! Only the account owner is able to manage these settings.

Accessing Support for Administrators

You can access support via the ‘Support’ tab in the admin portal at the bottom of the left-hand navigation bar. You can search for FAQs or select the option to contact the support team.



To view the full library of FAQs, click on a suggested article, and press the icon to the right of the article title (circled).

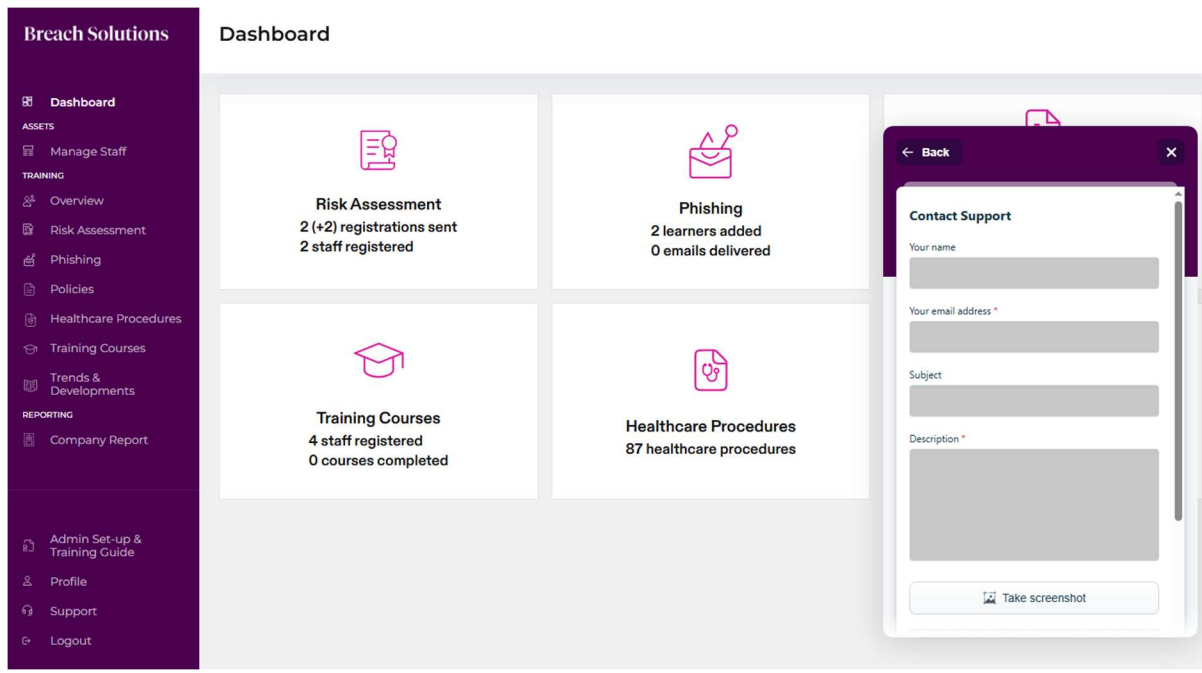


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Raising a Ticket

If needed, you can submit a support ticket to our team. Please include as much detail as possible and attach screenshots to support your request. This will help our support team resolve your issue more efficiently. Note that support hours are listed in the portal, and our team will aim to contact you within an hour of you raising the ticket.

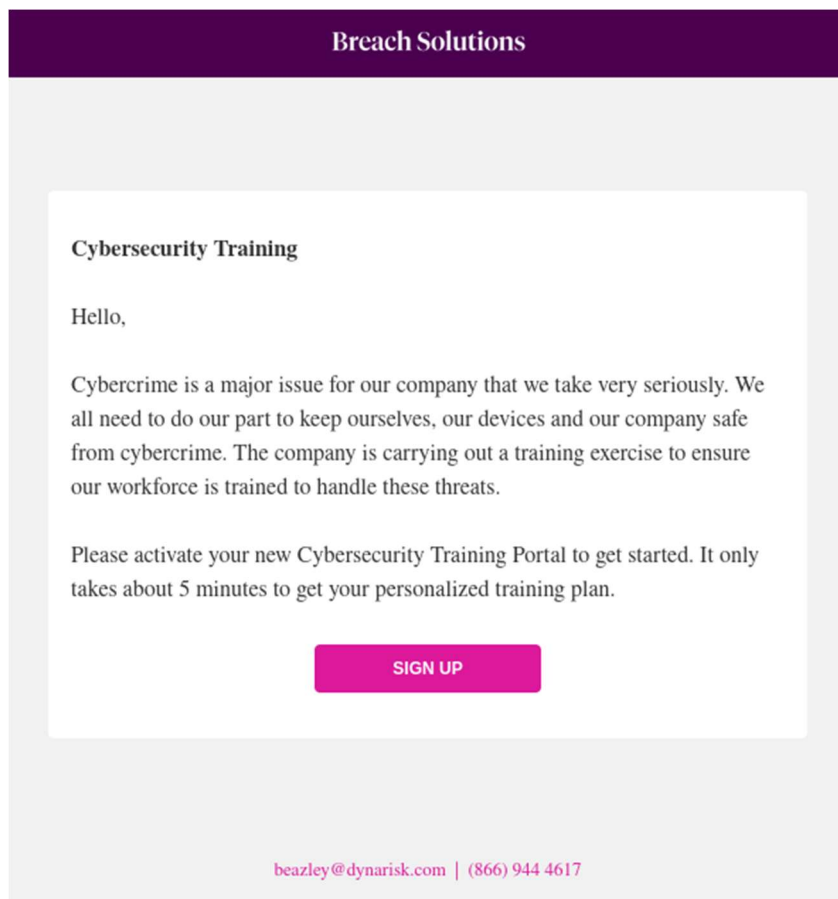
You can also contact the support team using the number **(866) 944-4617** during the specified working hours, or by reaching out to them directly via email at beazley@dynarisk.com.



Setting up Your Staff Portals

Activating a Staff Portal

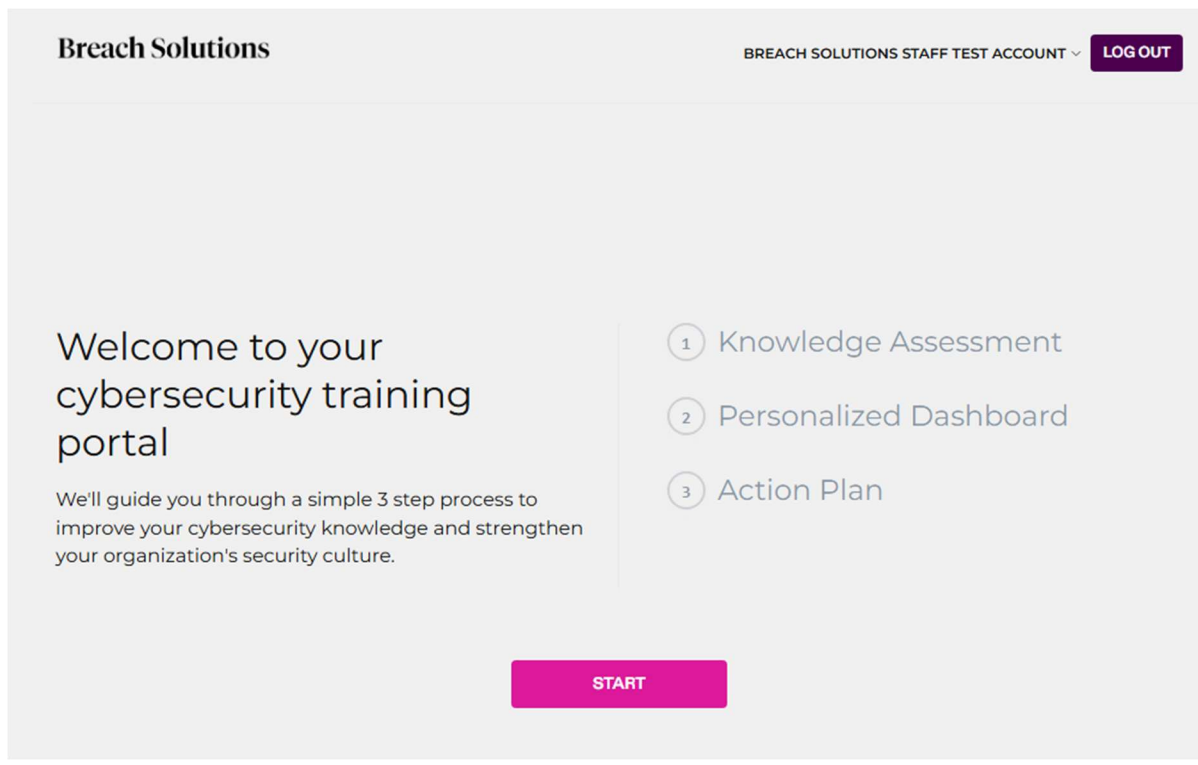
Staff are given access to a separate staff portal, which hosts their risk assessments and action plans, training courses, policies, and trends & developments. Once the admin initiates risk assessments, staff members will receive an invitation to set up their accounts. All staff whose email addresses are in the system at the time of initiation will receive an invite, and any new staff added thereafter will automatically receive an invitation upon being added to the system.



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Registration & Cybersecurity Risk Assessment

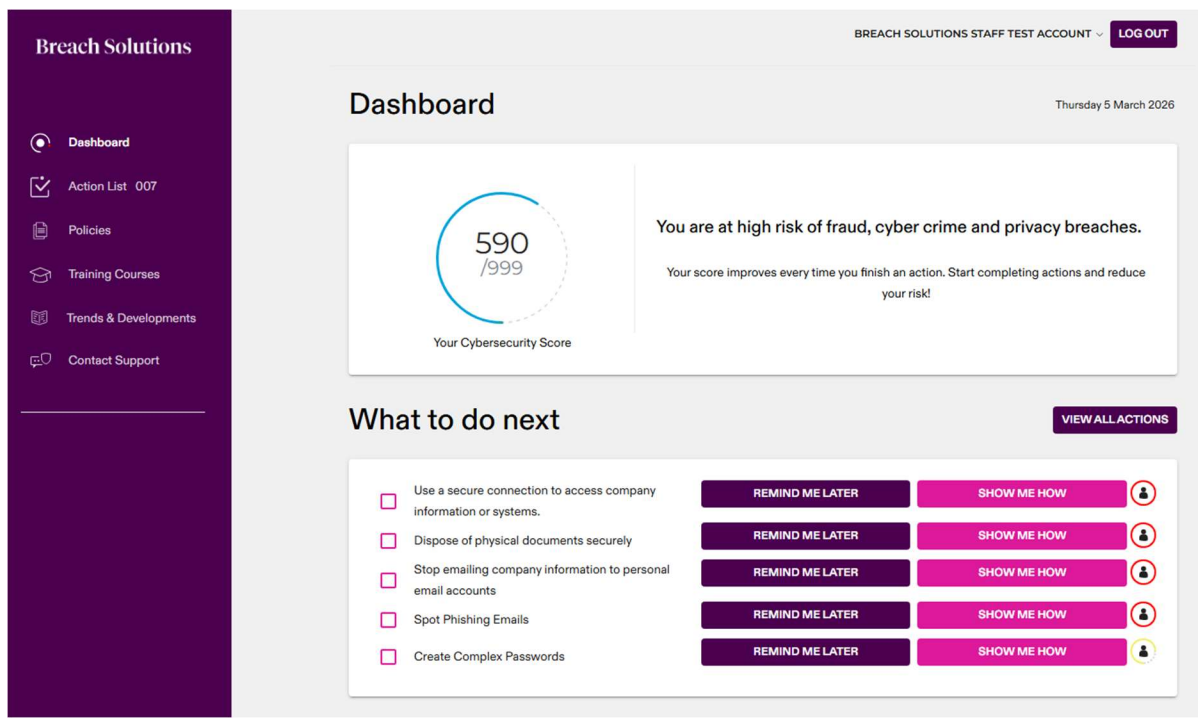
Once employees click the activation email, they will be directed to the staff portal, where they'll need to enter some basic details and complete a risk assessment. This assessment isn't a test but rather a way to identify knowledge gaps, allowing us to tailor the action plan to their specific needs.



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Staff Portal Main Dashboard

Once the employee activates their account, they will arrive at the main dashboard. Here, they can view their initial cybersecurity score along with a personalized cyber action plan. The score provides insight into their risk level, while the action plan offers bite-sized, step-by-step recommendations to help reduce that risk. This information is generated based on their assessment input.



Breach Solutions

BREACH SOLUTIONS STAFF TEST ACCOUNT [LOG OUT](#)

Dashboard

Thursday 5 March 2026

590 /999
Your Cybersecurity Score

You are at high risk of fraud, cyber crime and privacy breaches.

Your score improves every time you finish an action. Start completing actions and reduce your risk!

What to do next

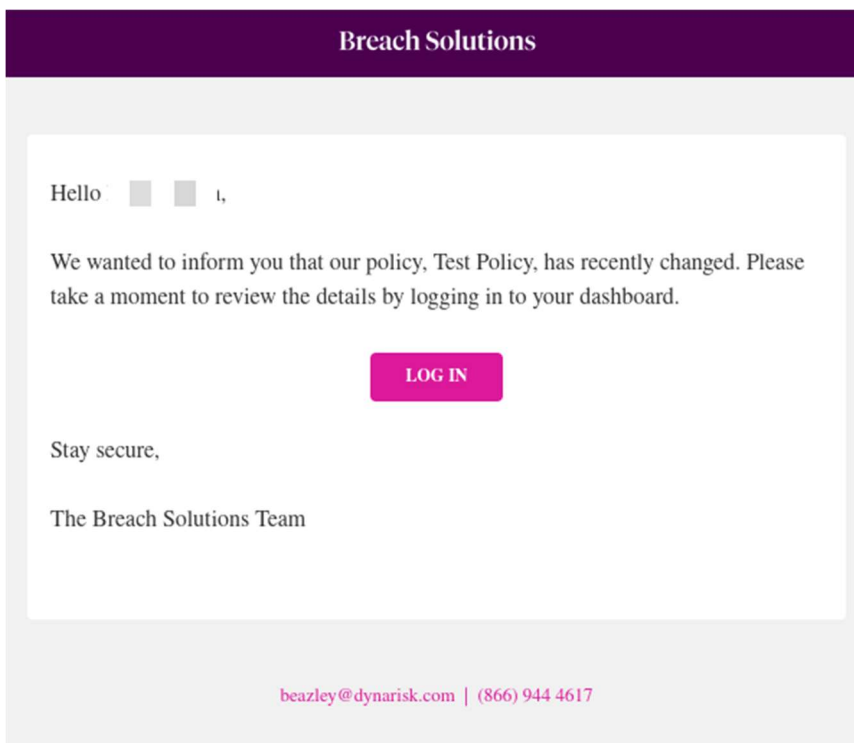
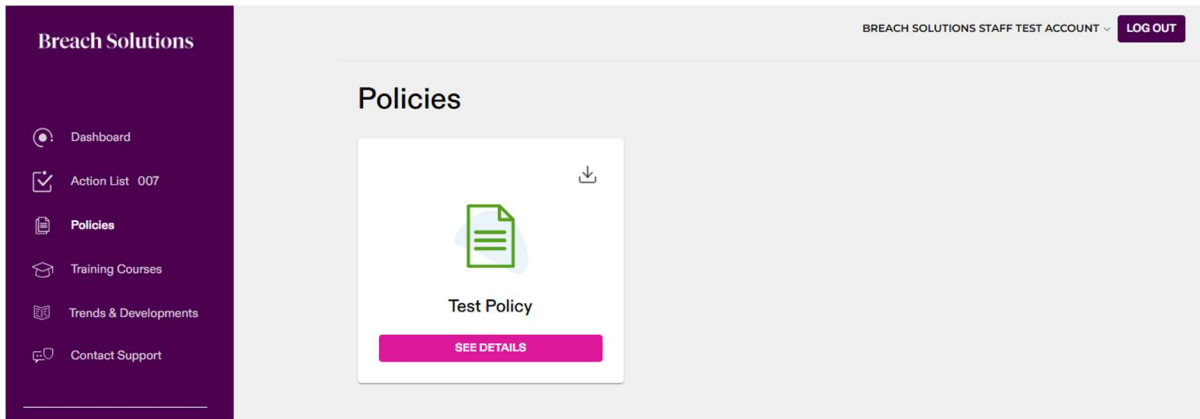
[VIEW ALL ACTIONS](#)

- Use a secure connection to access company information or systems. [REMIND ME LATER](#) [SHOW ME HOW](#)
- Dispose of physical documents securely. [REMIND ME LATER](#) [SHOW ME HOW](#)
- Stop emailing company information to personal email accounts. [REMIND ME LATER](#) [SHOW ME HOW](#)
- Spot Phishing Emails. [REMIND ME LATER](#) [SHOW ME HOW](#)
- Create Complex Passwords. [REMIND ME LATER](#) [SHOW ME HOW](#)

Once users complete an action, they can check it off, which will contribute to improving their cybersecurity score. Admin users have the ability to view both cybersecurity scores and training progress at any time through the admin dashboard.

Staff Policies

Staff can view active company policies set by the admin user under the 'Policy' tab. If an admin user adds a new policy or makes a change to an existing policy, staff members will also be alerted via email.



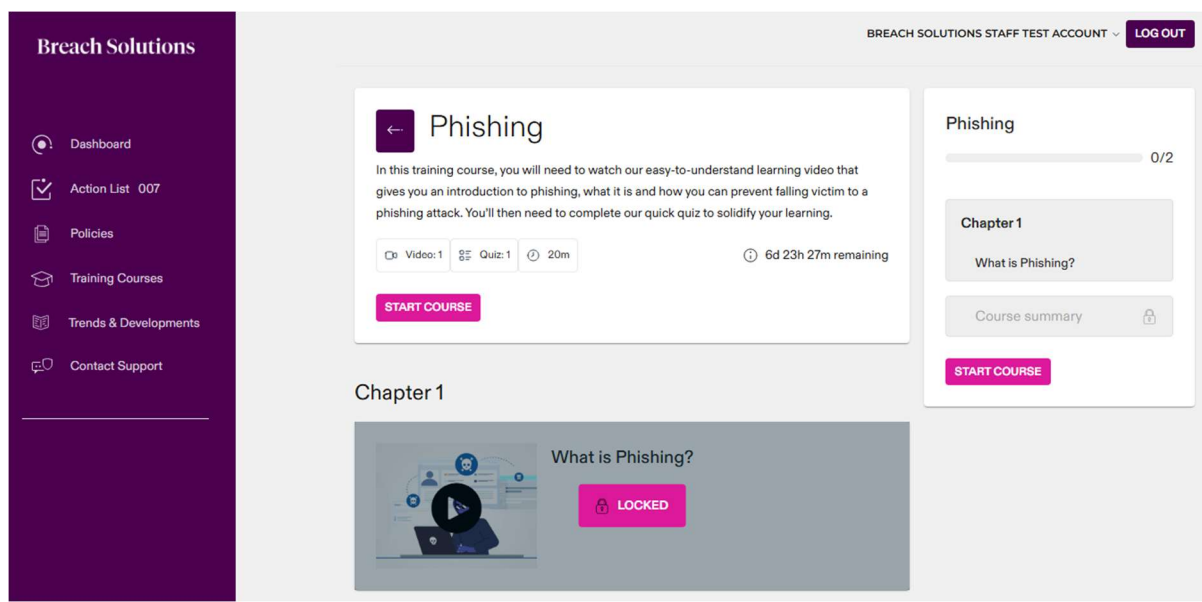
Claims handling and breach response services are provided by Beazley USA Services, a member of Beazley Group. Beazley USA Services does not underwrite insurance for the Ohio Bar Liability Insurance Company. Policies purchased through the Ohio Bar Liability Insurance Co. are subject to the Ohio Bar Liability Insurance Co.'s underwriting processes. 34

Staff Training Courses

Employees will have access to video training courses assigned by the admin user. They will receive email notifications and can then access the designated courses in the training tab.



To access a course, employees can click on the 'Training' tab and then click on the course they wish to access. Employees will see the course information, such as how many videos and quizzes are included, and an estimated duration of how long it takes to complete the course if completed in one go. The (i) icon tells the employee how long they have left until they reach the deadline set by the admin user to complete the course.



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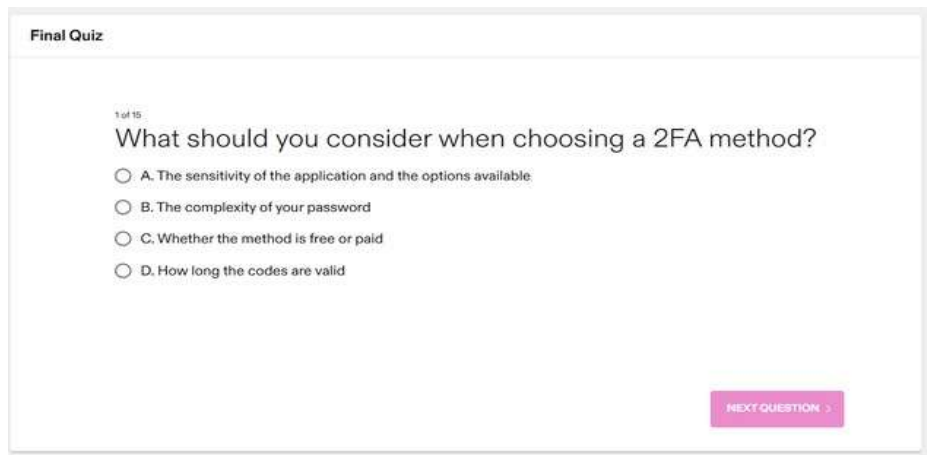
The employee can then work through the videos by clicking ‘Start Course’ and then clicking into each chapter, and can then complete the quiz at the end of the course.

Employees can work through the chapters at their own pace, logging in and out as required, as their progress will be saved.

However, please note that the quiz must be completed in one session; if the browser is interrupted or if the user logs out, the quiz will automatically restart.

Completing a Training Course

Once an employee has worked through the video chapter, they will be able to press ‘Complete video’. Once all video chapters have been completed, they will need to take a final quiz. The employee must score 80% or above to pass the course.



Get your PDF Certificate

DOWNLOAD CERTIFICATE 

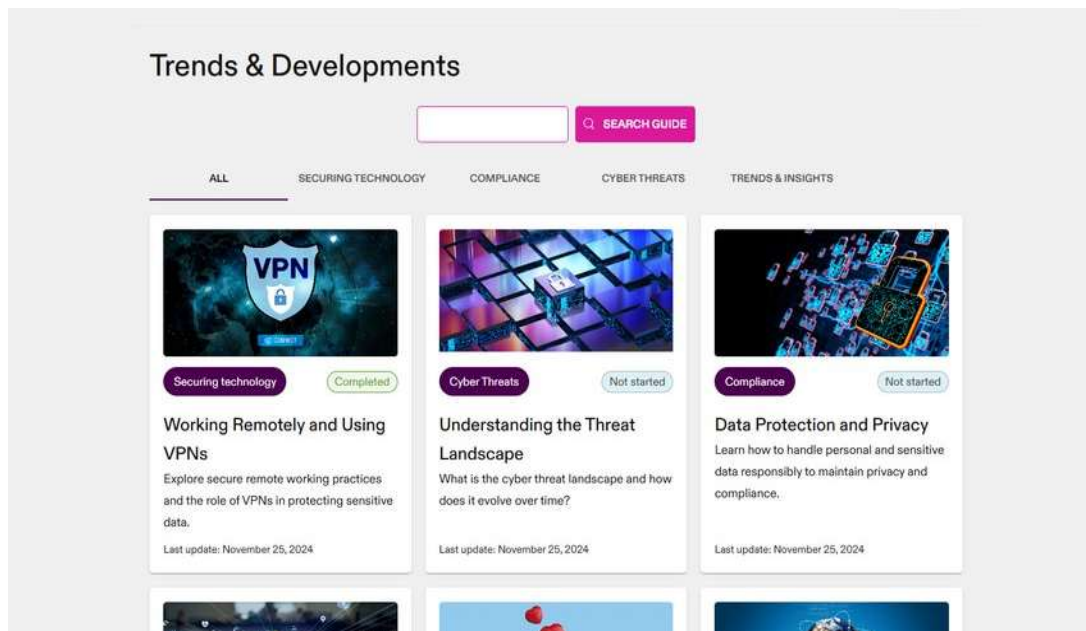


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Upon completion, the employee can download a pass certificate. If an employee fails the course, they will need to retake it. They will be required to complete all of the video chapters again to be able to retake the quiz. They will be able to begin rewatching the videos immediately, however, they will only be able to reattempt the quiz after 16 hours following the first quiz completion.

Trends & Developments

Employees have the ability to explore a comprehensive library of cyber trends, developments and insights, allowing them to view content across various categories. This library is automatically populated by the service provider, as per the admin portal and is not editable.



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Accessing Support for Employees

Employees can access support at any time by heading to the support tab. They can then either raise a support ticket or call the support helpline using the contact details shown in the portal. Our team will aim to respond to tickets within an hour of submission, within the specified support hours displayed.

Breach Solutions

BREACH SOLUTIONS STAFF TEST ACCOUNT **LOG OUT**

Contact Support

Name
This field is required

Email address
This field is required

+1 US Phone number

Subject

Message

SEND MESSAGE

Call us

Monday to Friday
Working hours
9am - 5:30pm EST
(866) 944-4617

Get started today!

Should you require any additional help, please utilize the support features available in either the admin portal or the staff portal and contact our support team.

OBLIC Loss Prevention & Risk Management Support

OBLIC can help. From supporting users accessing the Breach Solutions Risk Management site, to assisting with model policies, to helping identify an attempted social engineering scam, OBLIC's Loss Prevention attorneys are available. Contact us at **(614) 488-7924** or email LossPrevention@oblic.com.

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