BetterCloud Administrator Certification Study Guide

Breakdown of the Exam

BetterCloud's Administrator Certification Exam will consist of 50 items (questions) consisting of mostly discrete option multiple choice (or DOMC) items. If you have never taken an exam that is DOMC, you will want to visit [this page](#) to review what it is like. However, there are other types of items, including traditional multiple choice, true/false, matching, and build lists (where you put answers in the correct order to complete the item). You will have 90 minutes to complete the exam.

Exam sections and their weights:

Section	Exam %
General Product Proficiency *Covers the user interface and BetterCloud terminology*	10%
Integrations, Permissions, and BetterCloud's Dashboard *Capabilities of the Integration Center, and Dashboard, plus setting up Permissions*	10%
User's, Groups, and Files Grid Views *Covers the items, rows, and columns in each grid view. Also covers use cases and capabilities for Users, Groups, and Files.*	10%
Alerts and Workflows (including User Lifecycle Management) *Need to know the Alert section's UI, the three Alert Types, and how Alerts can be set up. For Workflows, the parts of Workflow Builder, what makes a Workflow valid, and use cases for automation (specifically around user lifecycle management) are all covered.*	30%
Security and Data Loss Prevention *You will need to know how BetterCloud can help you set up Alerts and Build Workflows for your security and data loss prevention use cases. Also covers Content Scanning in depth, including the three scan types, their capabilities, and when they should be used.*	20%
Discovering Applications *This section focuses on BetterCloud Discover, and how the platform allows you to understand how people are signing into what apps.*	10%
Audit, Troubleshoot, and Get Support *Covers the navigation, capabilities, and use cases for the Audit Log, how to troubleshoot your Actions and Workflows, as well as how you can get assistance from BetterCloud's Support section and team.*	10%

On the next page, you will see a breakdown of the exam's sections and subsections, covering everything you may be asked.

Exam Sections and Subsections

General Product Proficiency
- Understanding the platform's navigation
- Defining parts of the interface
- Recognizing SaaSOps use cases

Integrations, Permissions, and BetterCloud's Dashboard
- Identify the applications and best practices which should be used when installing BetterCloud
- Understand the capabilities and interface of the Integrations Center
- Identify, define, and compare Full Integration applications and Actions-Only Integration applications
- Explain how to assign permissions in BetterCloud
- Identify the sections and use cases for BetterCloud's Dashboard

User's, Groups, and Files Grid Views
- Explain the Grid Views in the Directory (Users and Groups)
- Use the Actions Engine menu to perform Actions on Users, Groups, and Assets
- Describe the functions and permissions of the Files Grid
- Explain the difference between the different sharing and visibility types
- Find and examine, alter, or delete shared files

Alerts and Workflows (including User Lifecycle Management)
- Identify and/or describe BetterCloud's three Alert types
- Understand how to create, customize, and utilize Alerts
- Explain how to properly use the WHEN, IF, and THEN sections of Workflow Builder
- Understand the principles of creating, saving, and publishing Workflows
- Understand Templates, when they should be used, and the benefits they provide
- Analyze User Lifecycle Management readiness, identifying how to use Workflows for Onboarding and Offboarding

Security and Data Loss Prevention
- Describe and identify the Security use cases BetterCloud can solve for
- Explain the use cases for the types of Scans you are able to perform

Discovering Applications
- Identify and evaluate BetterCloud Discover's use cases
- Review and correctly note the data points BetterCloud Discover surfaces in the platform

Audit, Troubleshoot, and Get Support
- Describe the function and use cases for BetterCloud's Audit Log
- Receive support through documentation and Live Chat
- Analyze and troubleshoot Workflows from the Workflow Results page

General Product Proficiency

**Understanding the Platform's Navigation**

This section of the BetterCloud Certified Administrator Exam looks to evaluate how well you know your way around the BetterCloud platform. From knowing the menu items and their subsections, to understanding where you would need to go to build automation within BetterCloud, it is best to have a handle on the following topics:

BetterCloud's Navigation Menu includes the following items:

- **Dashboard**: BetterCloud's landing page when you first sign in. ***No subsections.***
- **Alerts:** Listening for changes that occur within Fully Integrated applications, Alerts has two subsections: Manage, and Triggered.
  - *Manage:* The Manage subsection of Alerts is where you can go to View, Edit, Clone, and Create your BetterCloud Alerts.
  - *Triggered:* The Alerts that display in the Triggered section have met their conditions, and have returned results within BetterCloud.
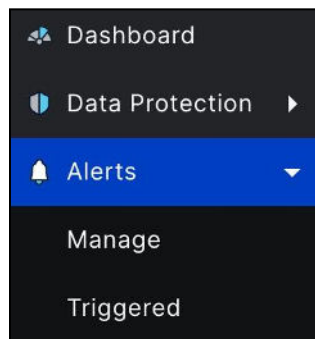

- **Directory:** The BetterCloud Directory houses all of your Users and Groups in two different Grid Views, broken up into their own separate subsections of the Navigation menu.
  - *Users:* Here, you can find all Users known to BetterCloud (and their metadata) from Full Integrations.
  - *Groups:* Here, you can find all Groups and the Group Members known to BetterCloud from Full Integrations.
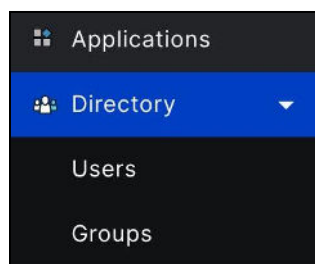
- **Files:** If you have Files or Folders from Box, Dropbox, Google (non-Shared Drives), Microsoft 365, or Slack, you will be able to find and take Action on them in the Data Protection section of BetterCloud.
    - *Data Exposure:* Shows file oversharing reports, including files shared externally and publicly
    - *Files:* Displays all known files in a Grid View, with rows for each file and columns for each piece of metadata.
    - *Content Scanning:* Allows you to create new File Audits, see File Audit results, and check on File Audits that are in progress.


- **Workflows:** Houses all created Workflows (no matter their status), and BetterCloud's Workflow Templates.
    - *New:* Allows you to create a brand new Workflow from scratch.
    - *Templates:* Allows you to create a Workflow with guidance based on BetterCloud's best practices.
    - *Manage:* Allows you to create new Workflows, but also see what Workflows are Published, Saved, and Inactive. Also allows you to Edit, Clone, Delete, Deactivate, and check Workflow Results.
    - *Activity Feed:* Allows you to view in progress and completed workflows from the last 30 days.
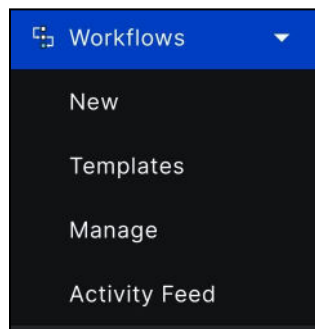
- **Integration Center:** Home for all Fully-Integrated Applications, Actions-Only Integrations, and where you would begin building Custom Integrations (if your organization has the BetterCloud API version of the platform). **No subsections.**
- **BetterCloud APIs:** *As this is the Administrator Certification, no part of this section will be covered within the exam.*

- **Privileges:** Allows you to grant your users access to BetterCloud.
  - *New:* Here, you can build new Roles for your users, limiting their access to specific parts of the application, or add users to Roles that already exist (like Super Admin).
  - *Manage:* Here you can see all of the Roles that have been created by yourself or others. You may also edit existing Roles, reassign users into different Roles, organize Roles, and create new Roles.
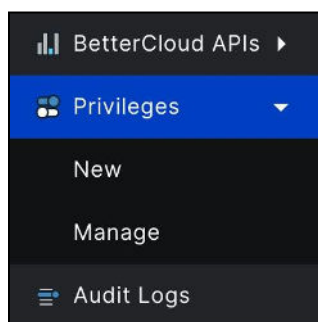
- **Audit Logs:** A full history of everything that has occurred within BetterCloud. Allows you to check activity, troubleshoot issues and provide additional information for BetterCloud's Support team. ***No subsections.***
- **Support:** Looking for documentation? Need to create a ticket or check the status of your issue? You can do so from this section. ***No subsections.***

Defining Parts of the Interface

In addition to the terms above, there are some specific terms BetterCloud uses to identify objects in the platform. In this portion of the General Product Proficiency section, you will be asked to define some terms that are either exclusive to BetterCloud, or identify how BetterCloud uses the term. For example, what is the "Dynamic Field Selector," and how would you use it? What is a "Workflow" or an "Alert" within the BetterCloud user interface? These are the types of questions you will need to know the answer to.

Parts of BetterCloud's User Interface Include:

- **Action:** Allows you to perform tasks on one, or on multiple users. These include things like resetting passwords, editing profiles, changing file sharing settings, archiving empty Channels, and adding Users to a Group.
- **Alerts:** These allow BetterCloud to listen for changes that occur within your Full Integrations. These can be used for tasks such as User Lifecycle Management, Security, Data Loss Prevention, and License Reclamation.
- **Assets:** These are objects that BetterCloud can find within your Full Integrations. They include things like Users, Groups, Files, Calendars, and Organizational Units.

- **Dashboard:** The landing page of BetterCloud, and the first thing you see when you log in. It provides you high-level information about your Integrations, Users, Files (and their sharing settings), Alerts, Workflows, Alert Trends, and the latest updates from BetterCloud. The Dashboard can be filtered by Instances of Full Integrations, providing details about only that specific instance of each application.

- **Dynamic Field Selector**: Two open brackets housed within a blue box (example:), helping you to automate Actions on one or many objects. The Dynamic Field Selector allows you to do things like:
    - Pass data like email address, first name, last name, title, and department for Users from one application to another (or as part of proactive communication).
    - Pass file/folder data like Name/Title, Description, Owner Name, Owner Email, Size, and Type into proactive communication.
    - Dynamically target a User, File, Group, or a User's Manager based on metadata known to BetterCloud.
- **File:** Files known to BetterCloud can come from the following Full Integrations: Box, Dropbox, Google, Microsoft 365, and Slack.
- **Group:** Groupings of Users. These can be anything from traditional Google Groups to things like Slack Channels and OneLogin Roles.
- **Integration:** These can be Full, Actions-Only, or Custom. To BetterCloud, an Integration is an application that has been connected (or "installed") into BetterCloud.
- **Instance:** An Instance is a single version of an Integration. BetterCloud allows you to have many Instances of, for example, Google. You may have an Instance of Google for your Full-Time employees, an Instance for Contractors, and an Instance for testing. All three of these Instances can be set up within BetterCloud. The _INTEGRATION_ is Google. The _INSTANCES_ are Full-Time, Contractors, and Testing.
- **Sync Times:** When an event occurs in BetterCloud, it needs to be sent _to_ the integrated application you made the change in. Before it can be reflected in BetterCloud, it needs to then sync _back into BetterCloud_. Changes in BetterCloud's UI are not instantaneous, and thus, are dependent on these sync times.
- **User:** Any account that is known to BetterCloud. These can be shared accounts, service accounts, dummy accounts, or real-life employee accounts. If the account is found in a Full Integration, it will be represented as a User.
- **Workflows:** At a high level, Workflows are a list of Actions that run in a specific order. They can automate Activity across your SaaS applications via WHEN, IF, and THEN logic when published, or be run On-Demand as Actions in their own right.

Recognizing SaaSOps Use Cases

SaaSOps is a practice that refers to how software-as-a-service (SaaS) applications are managed, secured, and discovered through centralized and automated operations (Ops), resulting in reduced friction, improved collaboration, and better employee experience. Through BetterCloud alone, you are able to Manage users and groups, Secure users and file, and Discover applications

users are authenticating with your organization's credentials. Understanding the ways BetterCloud can do this is the premise of this section of the exam.

You'll want to be able to identify the following information for this section:

- **Why would I want to run a Workflow On-Demand?** On-Demand Workflows allow you to run the same Workflow on multiple Users, Groups, Files, or Folders, altering each Action listed individually. This allows you to execute the Workflows exactly the way you want and run them ad-hoc.
- **What can BetterCloud Manage and BetterCloud Secure help me with?** BetterCloud Manage allows you to do things like bulk-edit profiles for Users, provision Users into applications and groups, and perform zero-touch, automated onboarding and offboarding. BetterCloud Secure allows you to perform tasks like securing files by removing file sharing links in an automated way, and scanning files for specific content to prevent data loss.
- **What tasks can administrators in BetterCloud perform?** BetterCloud allows you to perform Actions related to User Lifecycle Management, Data Loss Prevention, Security, and License Reclamation actions across multiple applications. This can be done as one-offs on Users, Groups, Files, and Folders, or as part of a Workflow which automates your response to WHEN/IF conditions being met. For Full Integrations, BetterCloud also listens for changes in applications, then Alerts you when defined criteria has been met. These Alerts can kick off Workflows.

# Integrations, Permissions, and BetterCloud's Dashboard

Identify the Applications and Best Practices Which Should Be Used When Installing BetterCloud

Installing BetterCloud is the first thing you need to do when starting your journey with BetterCloud. No matter if you are being added as an administrator in your organization or you will be setting up BetterCloud for the first time, understanding how to install BetterCloud is a key aspect of being a BetterCloud administrator. Please review the following as these features and best practices may be part of your Administrator Certification exam.

Below are some keys to ensuring your BetterCloud installation is successful:

- **What applications can I use as my Primary Integration when setting up BetterCloud?** Your Primary Integration is the application you chose to set up, along with Bettercloud, when you first set up the platform. Oftentimes, this will be your source of truth. Without a Primary Integration, BetterCloud cannot be installed, as the Directory and Files sections of BetterCloud need to reflect data from your Primary Integration. Without it, BetterCloud would have no data to display. The Primary Integrations you can set up with BetterCloud, as of today, are **Dropbox, Google Workspace, Microsoft 365, and Okta.**
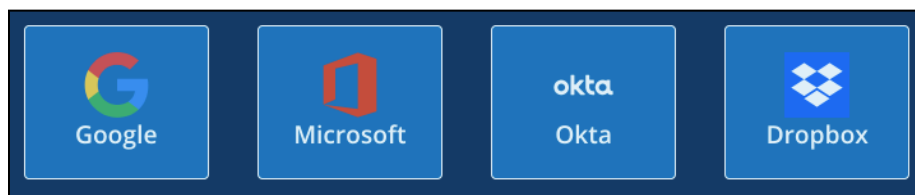
- **What if my source of truth is not a BetterCloud Integration?** If your source of truth is not any of these Primary Integrations you can first install alongside BetterCloud, you'll want to get *as close to your source of truth as possible*. For example, if your source of truth is BambooHR, and BambooHR is pushing users to Okta, you'll want to use Okta as your Primary Integration.
- **What type of account should I use to install BetterCloud?** When setting up BetterCloud, you should be using a service account with super administrator (or global admin, etc.) privileges. This will be an account that is not owned by any one individual in the organization, but instead can be accessed by more than one person. If an individual is connected to BetterCloud with their personal account, then leaves the company, automation and Alerts could stop functioning. Service accounts ensure uptime, reduce the risk of losing access to the platform, and can be excluded from multi-factor authentication policies.
- **Why do I need to accept scopes between BetterCloud and my Primary Application?** Accepting the scopes (or permissions) that BetterCloud requires to take action in your

Primary Application ensures BetterCloud can take administrative actions in the application. This includes things like resetting passwords, creating user accounts, and editing user profiles.

- **Why should I use an incognito window to install BetterCloud?** If you are using a web browser that permits you to have different profiles, you may have a profile for your work account, your personal account, and maybe a sandbox account or two. It can be easy to mistakenly install BetterCloud with your work account if you are using these profiles. By using a Guest or Incognito window to install BetterCloud, you are ensuring that you cannot mistakenly sign in as anyone else, as it will require you to use the Service Account's credentials to install BetterCloud.

Understand the Capabilities and Interface of the Integrations Center
BetterCloud's Integrations Center houses all of the applications that can be installed (or integrated with) the platform. Here, you can perform searches for integrations, view use cases and categories, see what integrations have already been installed, and see applications recommended to you.

*Below are some key things to know about BetterCloud's Integration Center:*

- **How can I find the Integration(s) I'm looking for?** Aside from being listed in alphabetical order, BetterCloud provides you with use cases, categories, and a search bar to look for Integrations by name.
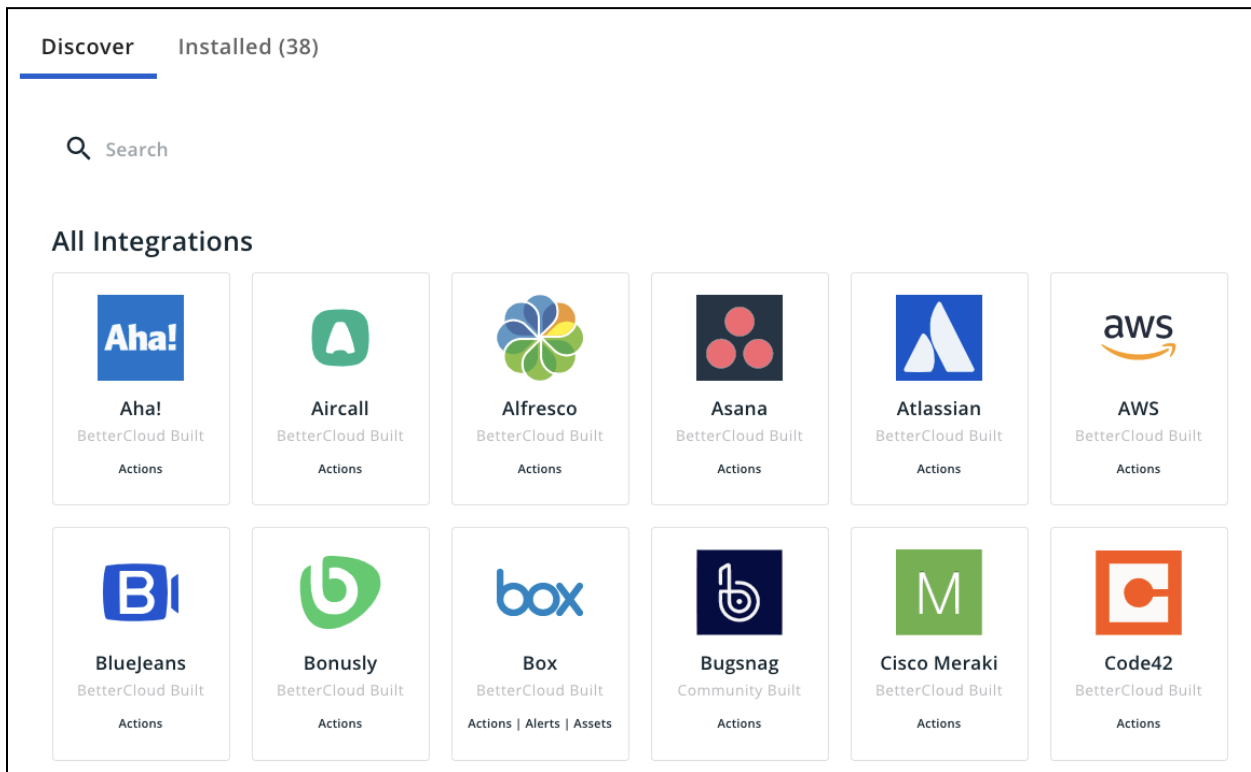
- **What information can I gather from an Integration's tile?** Based on an Integration's tile, you can also tell if each application is a Full Integration, or an Actions-Only Integration. Full Integrations will display "Actions | Alerts | Assets" below their name; however, Actions-Only Integrations will simply have "Actions" listed below the Integrations title.
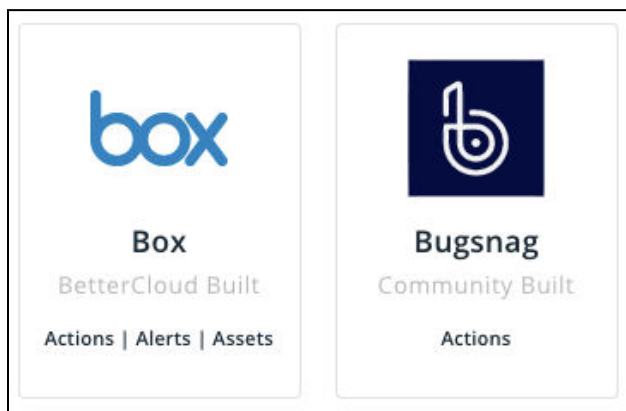
- **How can I install an Integration?** From the Integration Center, select the tile of the Integration you'd like to install. Click on the blue Install button below the Integration's title, then enter the required credentials (such as OAuth username and password or your API Secret and Key).
- **How can I remove Integrations I no longer need?** There are two tabs across the top of the Integration Center: Discover (to find Integrations) and Installed (to manage your Integrations). If you no longer need an Integration, you'll be able to uninstall an Integration from the Installed tab, with the exception of your Primary Integration.
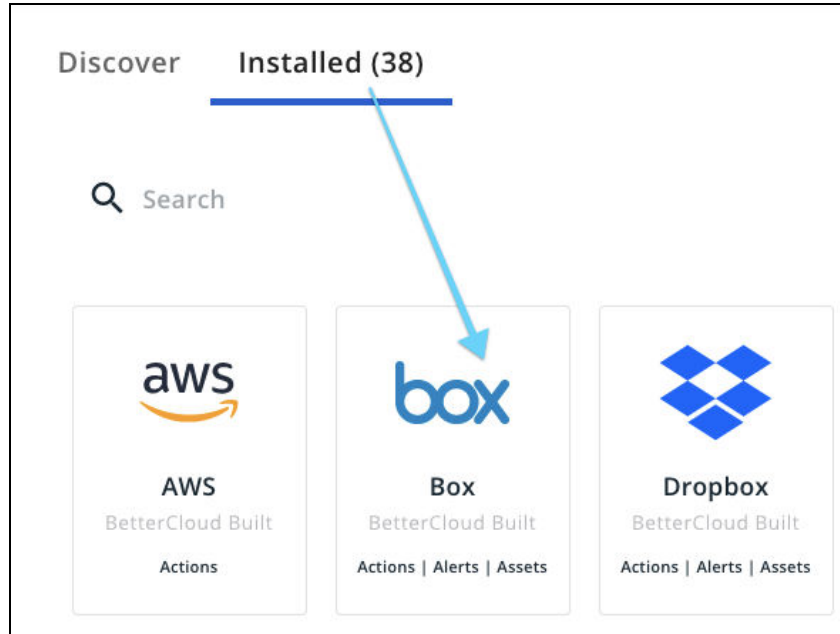
Identify, Define, and Compare Full Integration and Actions-Only Integration Applications
The information in this section is some of the most important information you will need to know as a BetterCloud Administrator, as it highlights the capabilities of the Integrations you can install into BetterCloud. It will serve you, not only in this section, but also in nearly all others across the entire platform. Understanding the difference between these two types of Integrations will significantly benefit you.

As noted in some of the previous sections, BetterCloud has two specific Integration types you will need to know about for this exam: **Full Integrations** and **Actions-Only Integrations**. BetterCloud does permit you to create Custom Integrations with the correct version of the platform, however, that topic is beyond the scope of this exam. There are a few key differences between Full Integration and Actions-Only Integrations.

Full Integrations allow you to:
- Ingest metadata from things like User, Groups, and Files (these are called Assets).
- See high-level data about these Integrations on the Dashboard.
- View Users and Groups that show up in the Directory.
- View Files in the Files section, scanning the content of known files (when applicable)
- Perform actions on listed Assets from the Actions Engine. This includes things like creating and disabling/deleting users, updating accounts, and altering file visibility.
    - Information can be passed from a Full Integration into any other Integration via the Dynamic Selector Field, such as Email, First Name, Last Name, Group Name, and things of that nature.

- ○ When taking action, you'll also often receive type-aheads when entering information into text boxes, as this is metadata that has been ingested.
- Build Custom Alerts from Template Alerts. System Alerts are set up when the Integration is installed.
- Set up Workflows via WHEN events and IF conditions.
- Add actions to any Workflow's THEN section.

Actions-Only Integrations allow you to:
- Perform actions from the Actions Engine. This includes things like creating and disabling/deleting accounts, updating accounts, and managing groups.
  - ○ Here, you will NOT get typeaheads. You will need to know (or pass along via the Dynamic Selector Field) the information housed in the Actions-Only Integration.
  - ○ However, if you know the information, you are still able to create users and groups, add users to groups, perform onboarding, offboarding, and mid-lifecycle management, etc.
- Add actions to any Workflow's in the THEN section.
  - ○ All that is listed in the subsection above applies here as well.
- Information can be passed from a Full Integration into an Actions-Only integration via the Dynamic Selector Field, such as Email, First Name, Last Name, Group Name, and things of that nature.

BetterCloud's current list of Full Integrations include...

- AzureAD
- Box
- Dropbox
- Google

- Microsoft (Office) 365
- Namely
- Okta
- OneLogin

- Salesforce
- Slack
- Workday
- ZenDesk
- Zoom

Broken down by sections, what will Full vs Actions-Only Integrations display?

| Section	Full Integration	Actions-Only Integration
Dashboard	Provides information about Alerts, Files, Integrations, Users, and Workflows	No data presented.
Alerts	System Alerts set up upon installation. Allows you to create Custom Alerts from Template Alerts	No Alert capabilities
Directory	Displays metadata from Users and Groups in grid views. Lists actions you can take in the Integration within the	Lists actions you can take in the Integration within the Actions Engine. **NO** Users or Groups will

|	Actions Engine.	display (no metadata ingested).
Data Protection	File metadata will display for Box, Dropbox, Google (individual drives), Microsoft 365 (OneDrive and SharePoint), and Slack. You can take actions on these files such as revoking shares, changing visibility, scanning them for content, in addition to viewing data oversharing reports.	No file metadata will display for Actions-Only Integrations.
Workflows	You can leverage these Integrations for all three Workflow sections: WHEN, IF, and THEN, meaning that Full Integrations are able to kick off Workflows when conditions are met.	You can leverage these integrations for the THEN section of Workflows, taking actions such as creating users, adding users to groups, and resetting passwords.
Integration Center	Allows you to utilize OAuth to install the application with Bettercloud. Listed on their tile as such: *Actions	Alerts	Assets*	Required things like API Key, API Secrets, Domain, Username, and things of that nature. Only Actions are listed on the tile

Explain How to Assign Permissions in BetterCloud

If you install BetterCloud as recommended, with a service account (ex. admin@domain.com), *your* assigned corporate account (ex. jdoe@domain.com) will not yet be set up as a Super Admin in BetterCloud. In fact, no other account will be set up with the exception of that service account. Therefore, you'll need to get other accounts access to BetterCloud, including your own.

*Below are some key things to know about BetterCloud's Permissions:*

- **Creating Roles**. When you need to give additional users or accounts access to BetterCloud, but do not want to give those users or accounts Super Admin access, you'll want to create **Roles**. For example, your HR and your Security teams may want to utilize BetterCloud for ULM or InfoSec purposes. When this is the case, you can create a Role, grant users or accounts access to that Role, and limit the access of the Role only to the specific sections of the platform that you'd like the Role's assigned users to see.
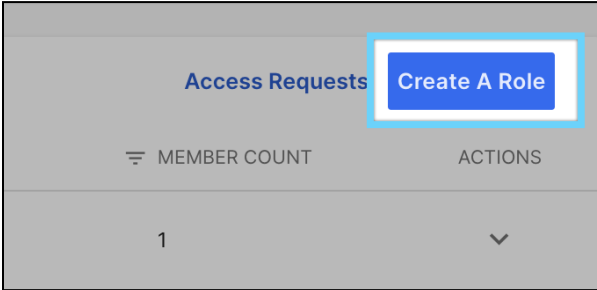
- **Limiting Access.** As mentioned, Roles allow you to limit access to the application only to specific sections, such as Alerts & Insights, Directory Management, Data Management, Workflows, and Integrations. You can grant users limited access to these sections, or any of their subsections. Access levels include Full, Create, Edit, Delete, and View.
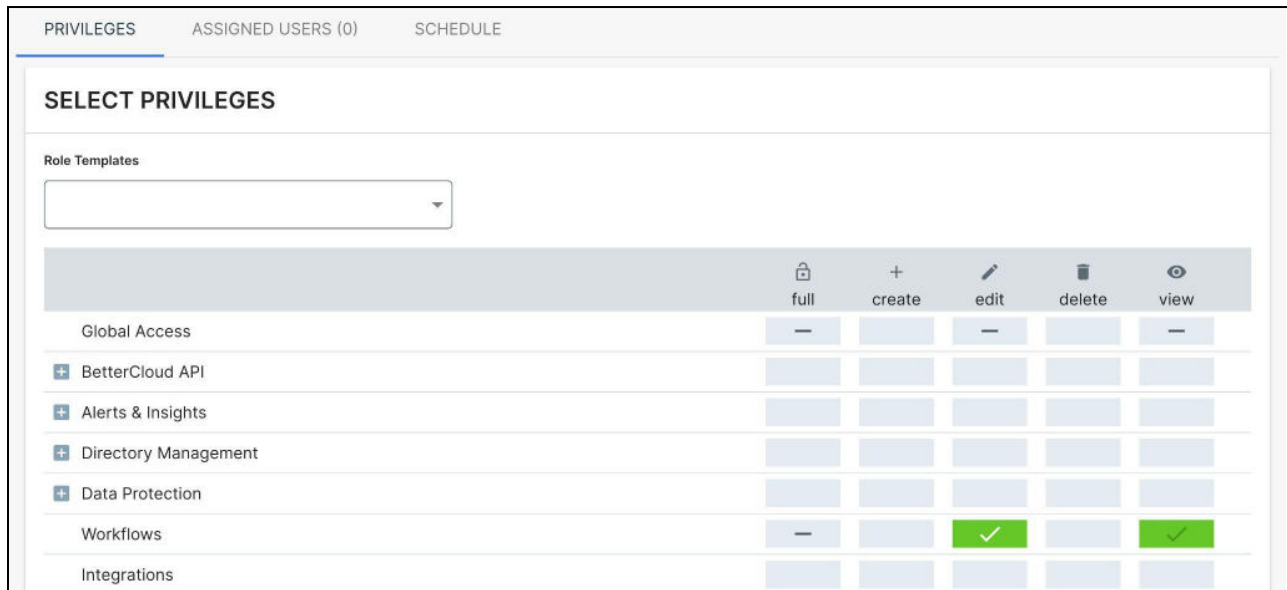

- **Access Requests.** If a user in your organization attempts to access BetterCloud without access, they can be prompted to submit an Access Request. From the Privileges > Manage page, you'll be able to review the requests and grant users access to BetterCloud.
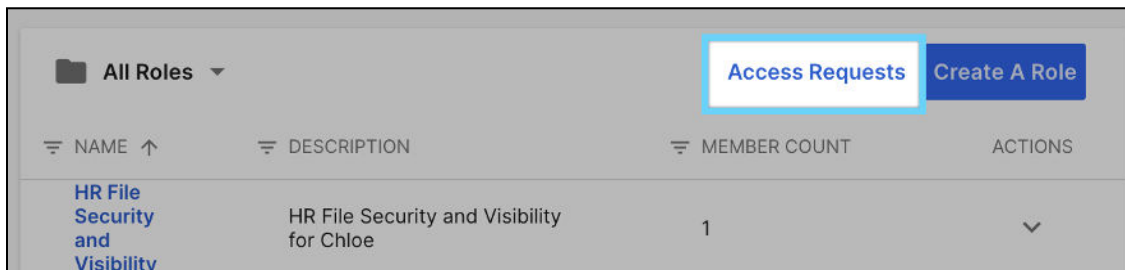

Identify the Sections and Use Cases for BetterCloud's Dashboard

BetterCloud's Dashboard is your landing page, providing you high-level information about your Full Integrations when you first sign into the platform. You can either see information about all of your Integrations, or filter the view of the Dashboard by Integration (or by Instance when you have multiple versions of an Integration). Below, you'll find a breakdown of the Dashboard and what information you can gather from it...
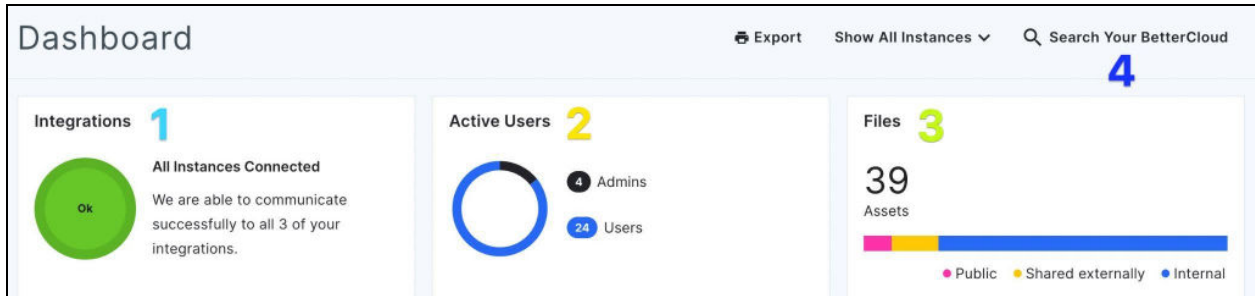
1. **Integrations:** Shows you the status of your Full Integrations and if they are successfully connected to BetterCloud. If they are not, the green circle presented will turn yellow. Will alter when you add a filter for specific Integrations or Instances.
2. **Active Users:** Displays the number of active users and admins you have across your Full Integrations. Will alter when you add a filter for specific Integrations or Instances.
3. All **Files** known to BetterCloud, broken down by Public, Shared Externally, and Internal. Will alter when you add a filter for specific Integrations or Instances.
4. **Search:** Allow you to search through BetterCloud's Users, Groups, Files, Alerts, Workflows, Support Articles, etc. To the left of search, you are able to filter by Integrations and Instances (as noted in the above three bullets, this will alter the Dashboard).
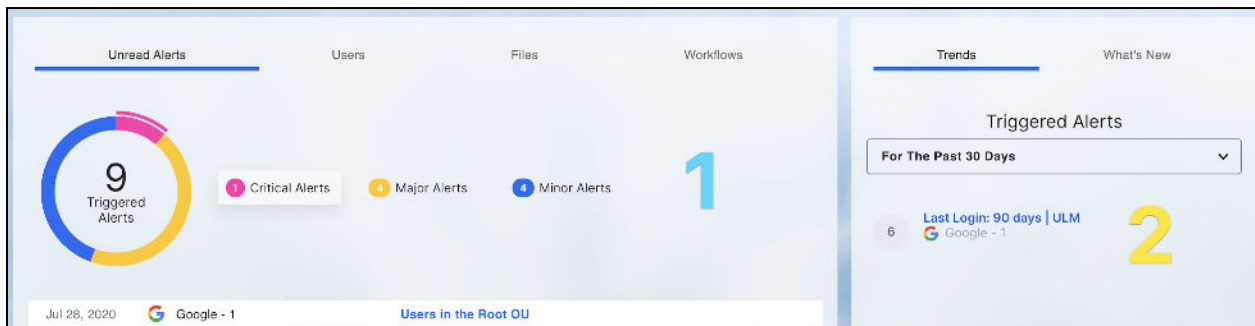
1. **Assets and Automations Tile:** Allows you to see, broken down by Integration, Unread Alerts, Users, Files, and Workflows. Again, this is only for Full Integrations.
2. **Trends and Updates:** Check your Trending Alerts for specific timeframes (ex. Today, For The Past 7 Days, For the Past 30 Days, etc), as well as the latest BetterCloud Updates.

User's, Groups, and Files Grid Views

**Explain the Grid Views in the Directory (Users and Groups)**

The Directory section of BetterCloud is composed of two sections: Users and Groups. You will be able to see metadata from both Users and Groups for all Full Integrations, but not for Actions-Only Integrations. However, you *will* be able to perform Actions via the Actions Engine for Actions-Only Integrations, including things like creating users, updating passwords, and adding users to groups.

Below are some key things to know about the Users and Groups Grid Views:

- **The User's Grid allows you to group users by Integration**. This feature allows you to see what users have access to which Full Integrations. Users, by default, are grouped together by their email address.
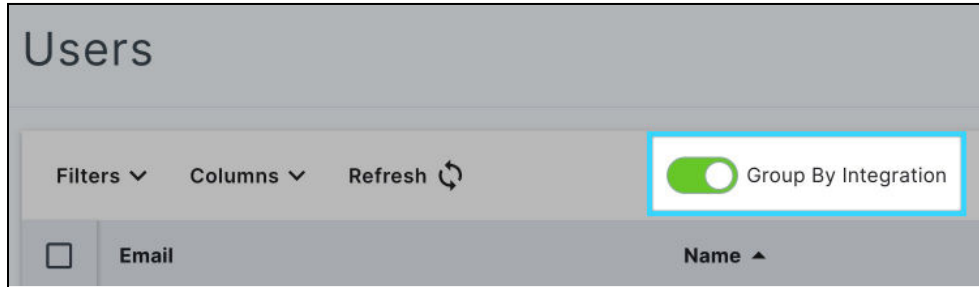
- **Columns in the Users and Groups Grid represent metadata synced into BetterCloud.** When you ungroup your Integrations, you are able to see additional columns. These columns include data that will display by default like Name, Email, and Integration. You can also add additional columns that Do NOT display by default such as Department, Title, and Manager. For Groups, you can see metadata like Name, Integration, and Member Count. Columns can be sorted and filtered to find the User(s) and Groups(s) that you are looking for.
- **The User 360 View.** When you click on the email address of a user in the Users Grid, this opens the User 360 view. It provides you with information about the User across all of your integrations, including profile information, groups the user belongs to, files the user owns, and settings on the user's account(s). If you wanted to take an action on an individual user, you could do so from here.
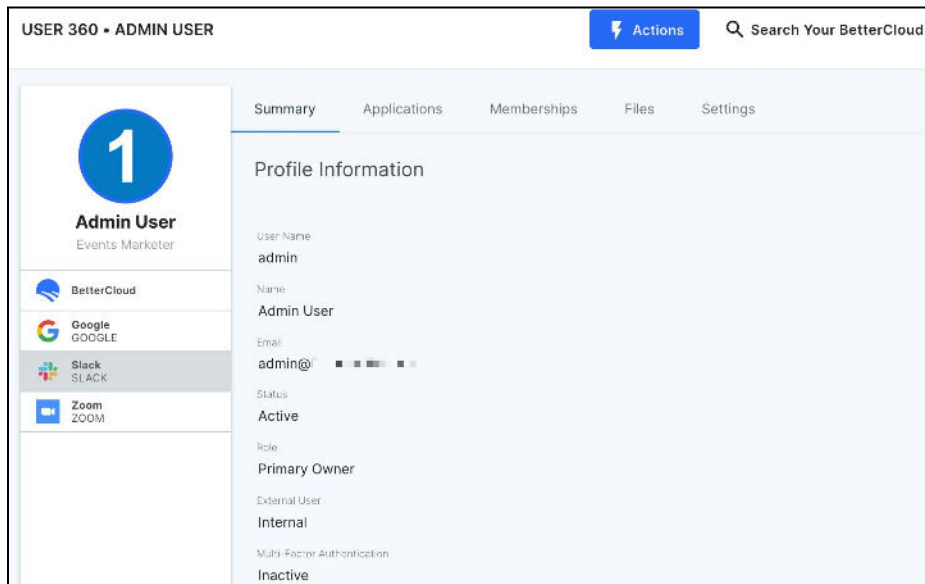
- **Viewing Groups and Group Members.** If you'd like to view metadata about Groups, expand Directory, then select Groups. This will display all Groups known to BetterCloud for your integrated Full Integrations. As with Users, columns will display metadata about the Groups such as Name, Email (when applicable), Type, and Member Count. As with the User's Grid, you can sort and filter these columns as needed. To view the members of a Group, click on the Group's name.
- **Getting IT some help.** You can set up a Role in BetterCloud for HR and Security employees, for example. With access only to the Directory, these employees would be able to do things like set up accounts, reset passwords, and disable/delete accounts.

Use the Actions Engine Menu to Perform Actions on Users, Groups, and Assets
Now that you know how to find the Users and Groups you are looking for in the Grid Views, you will need to know how you can take action on them via the Actions Engine. The Actions Engine allows you to:

- **Take Action on Multiple Users and Groups**. If you want to use the Actions Engine to take action on multiple Users or Groups, you will need to check the box to the left of each User or Group. This selects the items. Once selected, you can pick the Action that you want to run on the selected items. You can take actions such as editing profiles, resetting passwords, archiving/deleting Groups, and sending messages/emails to Group members.
- **Use the Dynamic Field Selector**. The Dynamic Field Selector allows you to pass information from one application to another. For example, you may want to select 50 users from the Users Grid and create new accounts for each in an Actions-Only Integration. Using a BetterCloud Action, you can take the selected user's email addresses and dynamically pass them into a field listed in the Action. In the background, this makes 50 different calls out to the application, each with the selected user's email address filling the field. Here is an example of what this looks like in BetterCloud. The Dynamic Field Selector button has been clicked, User's Email selected from Google, and the Email field filled in with a dynamic value.
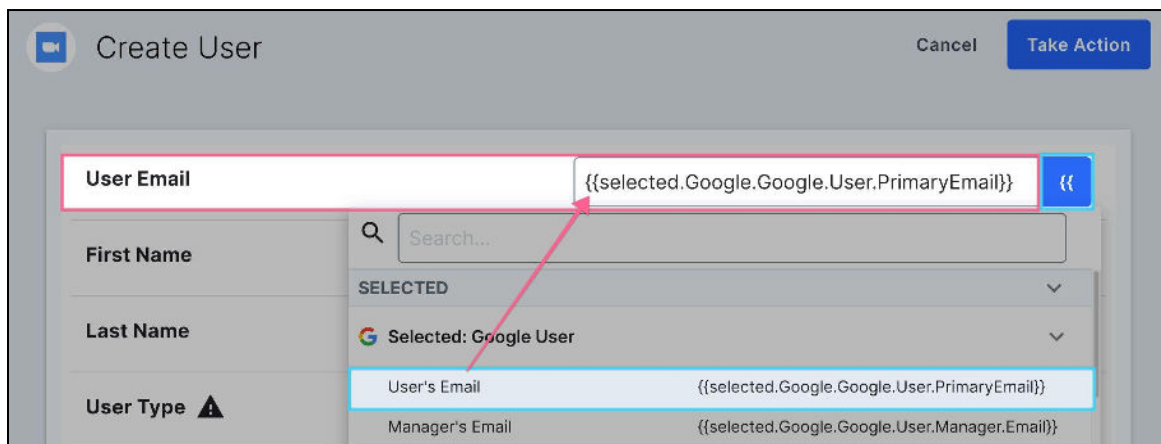
Using the example seen here, if you have selected Jon.Doe@domain.com, Jane.Smith@domain.com, and Bob.Reed@domain.com, Bettercloud will send three requests to the application:

Request 1: Email is Jon.Doe@domain.com
Request 2: Email is Jane.Smith@domain.com
Request 3: Email is Bob.Reed@domain.com

This is how BetterCloud's Dynamic Field Selector works, changing the dynamic value (seen as {{selected.Google.Google.User.PrimaryEmail}} in the above example) to be the value of the selected user's email address. This will work for many other applications and pieces of metadata, such as First Name, Last Name, Department, Title, and many more.

- **Select On-Demand Workflows**. Aside from selecting one-off Actions in the Actions Engine, you can also select any Workflow you've created, published or not, and run it as an "On-Demand Workflow." These Workflows will allow you to take multiple actions on Users or Groups, just as you would have if the Workflow started automatically. However, On-Demand Workflows give you the added ability to turn off Actions that do not need to be taken, and customize the values within those Actions. Below is an example of an On-Demand Workflow. Notice some Actions have been toggled off.

Describe the Functions and Permissions of the Files Grid and Explain the Difference Between the Different Sharing and Visibility Types

The Files Grid is what houses all files (and folders) that BetterCloud is able to ingest metadata for. This includes files and folders in the following Full Integrations: Box, Dropbox, Google, Microsoft 365 (OneDrive and SharePoint), and Slack. **Files for Actions-Only Integrations will not display in the Files Grid**. In this section, you will display knowledge of this grid view and how to navigate it.

Below are some key things to know about the Files Grid Views:

- **What Are Some of the Columns That Display On the Files Grid?** Similar to the Users and Groups Grids, you are able to sort and filter your columns in the Files Grid. The most popular columns include Name, Integration, Permission, Shared With, Owner, Date Created, and Last Updated. These are all pretty standard for a tool that allows you to manage files and folders; however, BetterCloud allows you to see this data in a single pane of glass across multiple Integrations, making the platform unique.

- **What is Internal vs. External vs. Public?** Internal files are only available to people who are managed users in your cloud storage system. For example, if your organization is BetterLabs, files that are **INTERNAL** would only be accessible to @betterlabs employees. External files have been shared to a user at a named domain. Therefore, a file shared to john.doe@salesforce.com and jane.smith@microsoft.com would be an **EXTERNAL** file. For files that can be viewed anonymously, these are classified as **PUBLIC**. They can be viewed by anyone with a link to the file, or by anyone who may find it via a search engine.
- **What is Shared With?** This column represents who has been given access to a file or folder. For example, if you see 5 Users and 4 Others, the 5 Users are specific accounts managed within your workspace. The 4 Others could be people outside your organization, or it means the file has a link that allows unknown users to view the file (includes people in your organization with a permission, like Anyone in Domain with Link or Anyone in Domain).
- **What Are the File/Folder Permissions?** Another unique feature of BetterCloud's Files Grid is the ability to see how files are being shared for all of your Integrations.

Knowing these Permission/Sharing terms and how they expose data will be critical, not only for this section, but for the exam as a whole. They are broken down below.

Term	Definition
Unshared *(Least Exposed)*	A file or folder only known to or shared with the Owner of the file (or the Owner + 1 other in 365).
Internal - Direct Share with User	Content explicitly shared with another, internal employee. Hidden from anyone who has not explicitly been given permission to the file/folder.
Internal - Anyone in Domain with Link	Any internal employee with a link to the file/folder can access this content. It's hidden from all who don't have a link to access the content.
Internal - Anyone in Domain	Any internal employee can find the file/folder, regardless if they have been shared explicitly or have a link. A search of all internal content will return this file/folder for the employee.
External - Link Share with User	***Specifically for OneDrive and SharePoint.*** A file has been explicitly shared with specific external users at a named domain (ex. john.doe@microsoft.com or jane.smith@gmail.com). Access provided via a single, unique link, accessible to the external users when they're logged into their account. Depending on how sharing was done by the owner/sharer, internal employees may also have access via this link.
External - Direct Share	A file has been shared explicitly with an external user or shared with a user outside of your Managed users list (ex. john.doe@microsoft.com).
External - Direct Share with External Domain	Shared explicitly with an external domain (Note: This permission can only be added via API for Google Drive).
Public - Accessible via Link	Anyone with the link or (when applicable) people with the link and password have access to this content. This does not need to be a name domain but instead can be sent to anyone via services such as Gmail, Outlook, or Yahoo. No way to track who has access to the file.
Public - Accessible via Search Engine *(Most Exposed)*	No restrictions. File/folder is crawled by search engines and can be found within public search results.

Find and Examine, Alter, or Delete Shared Files

Now that you understand how to find files you're looking for via the Files Grid View, you may want to take action on these files. In this section, we will look at the different ways you can take action on files and folders.

Below are some key things to know about actions you can take on Files and/or Folder:

- **Altering Sharing Settings.** This is a major use case for BetterCloud. Using the Permissions column, you can see the sharing settings on large groups of files. Perhaps you have two filters set up: Integration is Slack, Permission is Public - Accessible via Link. In this case, you can select the files, then alter their sharing permissions, changing the files from a public share to an internal share via an Action. Other Integrations allow you to get more granular, changing public shares to external shares, or only removing external collaborators. However, the idea is still the same: For Full Integrations (Box, Dropbox, Google Workspace, Microsoft 365, and Slack), BetterCloud will alter the permissions of files and folders in bulk.
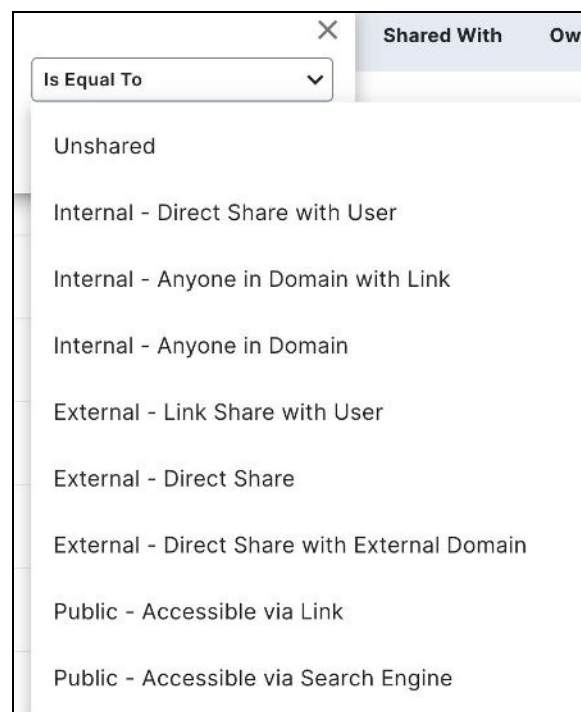
- **Removing Individual Collaborators.** Perhaps you'd like to pull an individual user off a file or folder. By viewing the asset, you can also do this. From the Files Grid, you are able to click the name of the file or folder, see who it has been shared with (example: jhunt7623@gmail.com), then remove that person from the file. This can also be done with internal users.

Alerts and Workflows (including User Lifecycle Management)

Identify and/or Describe BetterCloud's Three Alert Types

While it's great that you're able to find data in the Grid Views, it would be even better if you could be notified of issues BetterCloud finds. This can be done through **Alerts**. These Alerts allow you to proactively discover issues _for Full Integrations_. Alerts CANNOT be created for Actions-Only Integrations. This is because the Alerts listen for changes in the Full Integration, and when conditions are met, the Alert is triggered. Conditions can be based on metadata or actions, matching content within a file, or when events exceed a threshold.

Below are some key things to know about BetterCloud's 3 Alert Types:

- **System Alerts**. Set as Active as soon as a Full Integration is installed. These Alerts inform you of common issues BetterCloud sees in clients systems (Users in the Root OU, Empty Groups, Users without Titles, etc).
- **Template Alerts.** Help you build Custom Alerts for your Full Integrations. Their sole purpose is to be selected, then altered to fit your needs.
- **Custom Alerts.** Altered versions of Custom or System Alerts for your Full Integrations. They have conditions added to them, such as "AND" qualifiers, Content Scanning requirements, or a threshold. Thresholds can also be windowed (event occurs X times in Y minutes).

Custom	**User Forwarding Email | ULM**	G Google
Template	**Users: New Email Added to Forwarding List**	G Google
System	**Users: Email Forwarding Enabled**	G Google

Understand How to Create, Customize, and Utilize Alerts

Now that you know the differences between the Alert types, it's important to know how to set up your Alerts properly within BetterCloud. You'll want to build as many Alerts as you need, as there is no limit to the Alerts you can create in BetterCloud! This section will focus on altering your System Alerts, and building Custom Alerts from your Template Alerts.

Below are some key things to know about setting up your BetterCloud Alerts:

- **Two Alert Sections:** Alerts have two sections:
  - Manage, which allows you to set up/edit Alerts
  - Triggered, where you can see Alerts that have met their conditions. An Alert must be ACTIVE to be triggered. Inactive Alerts will not monitor events.
- **Finding the Right Alert for You.** You'll want to set up your Alerts based on each Integration. As with the other Grid Views, there are some columns to help you with this. You can sort and filter Alerts based on things like Name, Integration, Type, Description, Severity, and Status.
- **Setting Up Your Alerts.** By clicking on the name of a System or Custom Alert, you will be able to edit it. If you click on the name of a Template Alert, you will begin building a new Custom Alert. You are also able to duplicate Alerts if the Alert you plan to build in similar to another one already created.
  - When creating an Alert, you will need to give it a name, then set up its conditions.
  - Based on the type of event you are listening for, you will be able to set up different metadata for each Alert. For example, if you want to set up a Last Login Alert to monitor inactivity, you would be able to add conditions based on Email Address, Department, Title, Manager, etc. For files, you would not only be able to look at metadata like Name, Owner Email, etc, but you would also be able to set up Content Scanning, looking for matches on data within the body of a file. This includes predefined data, keywords, and Regular Expressions (REGEX). This will be covered in depth later.
  - To customize these Alerts further, you have the ability to set up thresholds, windowing (ex 5 events in a 10 minute window), and set the severity of an Alert for categorization purposes. *Severity has no impact on the Alert or on how it triggers.*
- **Alert Use Cases.** Alerts can be used to help with User LIfecycle Management (New User), File Security (Files Shared Externally), Email Forwarding (ex. Email Forwarded to Gmail), User Security (ex. Failed Login), and things of that nature. They would not be able to be used for physical security of your building (ex. Employee Card Swiped), Email Attachments (ex. Attached File Too Large), or to let you know when new Integrations have been set up.
- **Are There Limits to the Number of Alerts I Can Set Up?** No! Set up as many Alerts as you need!
- **My Alert Triggered. Now What?** The conditions of your Alert have been met! You can see a full history of the Alert (and what made it trigger) in the Alerts > Triggered section of BetterCloud. However, if you'd like to automate a response to an Alert being triggered, you will want to add the Alert to the WHEN section of a Workflow.

Explain How to Properly Use the WHEN, IF, and THEN Sections of Workflow Builder

Workflows are made up of three sections: **WHEN** (an event occurs), **IF** (it meets the listed conditions - this is optional), and **THEN** (perform the listed actions). Workflows are most commonly used to automate actions in your Full Integrations AND your Actions-Only Integrations. While only Full Integrations can natively be set as WHEN and IF conditions in your Workflow, any Integration type can be used in the THEN section.

Below are some key things to know about setting up your BetterCloud Workflows:

- **What Do I Need to Ensure My Workflows Run Automatically?** The bare minimum you need to execute a Workflow in an automated way is a WHEN event, and 1 THEN Action. You do not need an IF condition, as IF conditions *are always optional.* Therefore, WHEN the event occurs, at least one action will THEN be taken.
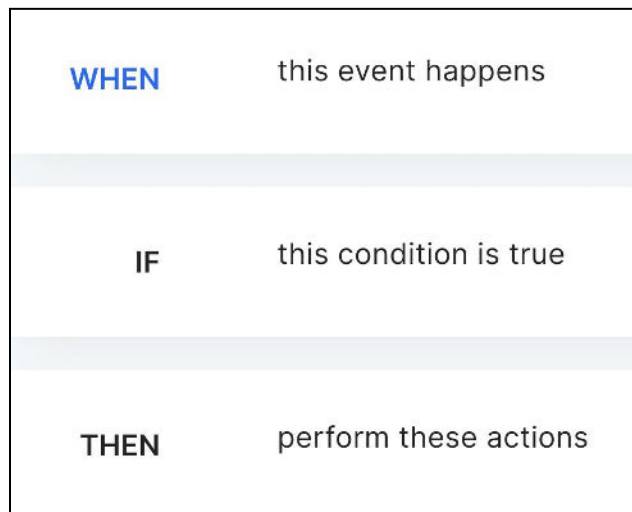
- **Why/When Do I Use IF?** Even though it's not required, IF conditions can be very useful to help narrow down who or what a Workflow will take action on. For example, if your WHEN event is "User Added to a Google Group," and there is no IF condition, the Workflow will run on *every single user added to any Google group*. Therefore, you may want to add IF conditions to the Workflow, such as IF Group is Sales OR IF Group is Marketing.

Understand the Principles of Creating, Saving, and Publishing Workflows

Now that you have an idea of what the parts of a Workflow are, it would be good to know what you need to do to ensure Workflows are properly created, saved (for review), or Published (to be run automatically).

Below are some key things to know about setting up your Workflow's Settings:

- **A Workflow Can Have Different Statuses. What Are They?** The two most used statuses are ACTIVE, which means that the Workflow will run automatically WHEN an event occurs (and optionally IF it's conditions are met) and DRAFT, which means that the Workflow will NOT begin automatically. A Workflow may also be set as INACTIVE, which means that it was ACTIVE at one point, but has since been turned off.
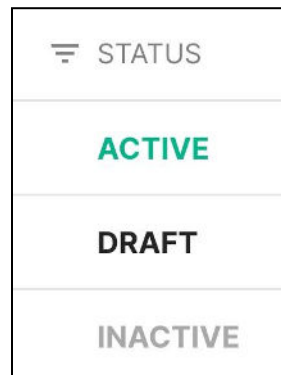
- **Why Would I Want a Workflow to be a Draft?** You may want a Workflow to be saved as a Draft for many reasons, but the two biggest and most common reasons are:
    - You'd like someone to review the Workflow before it is published.
    - You'd like to run it On-Demand exclusively.
- **Would I Ever Want My Workflow to NOT Run Automatically?** YES! As noted above, On-Demand Workflows can be a major help for your organization. If you need to run many actions on a random set of users, need to customize a Workflow each time it runs (altering its data or turning off THEN actions), or you want to test a Workflow before it is set as Active, you may want your workflow to be saved as a Draft before it is Published.
- **I'm Trying to Publish My Workflow, but It Won't Publish. What Gives?** Remember, your Workflow MUST have a Name, a WHEN event, and at least 1 THEN action. If this isn't the issue, the properties of your THEN actions may not be filled in. Issues within your actions could include things like…
    - I haven't identified who/what I want to take action on
    - I haven't completed a required section of the action's properties
    - I haven't made any changes, and therefore, there is nothing new to save/publish

Understand Templates, When They Should Be Used, and the Benefits They Provide

You want to get a head start when creating your new Workflow. Yes, you can duplicate Workflows that exist already, but none of your current Workflows meet your needs. Plus, you're not sure what best practices would be for your THEN actions. What can you do? Fortunately, BetterCloud offers Workflow Templates! With Template, you are able to pick from a list of use cases, select/deselect actions BetterCloud recommends, define your "trigger" events and conditions (WHEN/IF), then have BetterCloud build you your Workflow.

Below are some key things to know about Workflow Templates:

- **Do I Need to Do Anything Once a Workflow Template is Created for Me?** You do. Just like a template in a word processor, the shell is provided for you, but there are some details you'll need to fill in. BetterCloud's Workflow Templates will provide you with all of the recommended actions, who you plan to take action on, even filling in things like text within messages and CCing the Manager on important emails. However, if you plan to remove a user from things like Slack Channels or Google Shared Drives, you will need to fill in that information. Further, for Actions-Only Integrations, no metadata is being ingested, so you will need to know the name(s) of your assets you want to take action on.
- **Do I Need To Use All The Recommended Actions?** You do not! If there are actions listed in the template that you do not want to take, they may be deselected. Mistakenly deselect an action and want to get it back? No problem, you can add it back again!

Analyze User Lifecycle Management Readiness, Identifying How to Use Workflows for Onboarding and Offboarding

Ensuring your organization is ready to run onboarding and offboarding through BetterCloud does take a bit or work. There are some processes that need to be defined to know how you will trigger user lifecycle management events in BetterCloud, and understanding this is a key part of being a BetterCloud administrator. Remember: you will likely want to kick off onboarding and offboarding from your Primary Integration, which could be Dropbox, Google Workspace, Microsoft 365, or Okta. If none of these are your source of truth, you will need to determine how you are getting new users into your Primary Application.

Below are some key things to know about User Lifecycle Management readiness:

- **Walk Through Your Steps Manually or Diagram Your Processes.** This is a great way to understand what work you are doing, what work can be done through a Workflow, and what manual work you may still need to do. For example, adding a user to a folder could be done through BetterCloud, but walking a user around the office can not be.
- **Ensuring Profiles are Properly Filled In.** For all user lifecycle management, it's important to ensure that a user's profile is filled in as completely as possible in your Primary Integration. Things like Department, Title, Manage, Cost Center, and Location can be critical to ensuring onboarding and offboarding occur properly.
- **Ensure Your Users Are Organized.** When bringing users into your organization, and taking users out of your organization, you'll want to have an organizational methodology.

This could be Groups, Roles, Organizational Units, or things of that nature. Each application has different ways of organizing users, but the key theme here is that, no matter what application you are using, you have a way to identify users in an organized way. This will ensure they can be targeted as part of your user lifecycle management Workflows.

- **Knowing What Users Need for Onboarding.** You'll want to confer with people in your organization about things like department and location to ensure you know what specific users need when starting on their first day. What Department or Location will the user be working in? What applications will they need access to? What files and folders? Once this is known, you'll want to review your onboarding WHEN events and IF conditions, such as WHEN New User is Created, IF Department is Sales.

- **Knowing What Users Need for Offboarding.** Similarly, you will also want to speak with your Security or Legal groups, determining how long a user will need to be retained until they can be deleted, who transferred files and calendars should go to, and if you're offboarding different user types in various ways. Once this is known, you'll want to ensure you have a way to trigger your offboarding Workflows by reviewing your triggers such as WHEN User Added to Group, IF Group is Executives Offboarding.

- **Triggering Onboarding in BetterCloud.** If you want to begin your onboarding process in BetterCloud, this can be done through WHEN events such as User is Created, User Added to Group, or application-specific options such as User's Org Unit Changes or User Added to Role.

Security and Data Loss Prevention

Describe and Identify the Security and Data Loss Prevention Use Cases BetterCloud Can Solve For

Two additional use cases BetterCloud can help solve are security and data loss prevention, both for users and for data. These can be done through the Grid Views, Alerts, and Workflows. In fact, there are specific Alerts and Workflow Templates that will help you with your organization's security and data loss prevention needs.

Below are some key things to know about Security and Data Loss Prevention:

- **Alerts are for Full Integrations.** Just as with User Lifecycle Management use cases, Alerts can only be created for Full Integrations. This includes Full Integrations such as Box, Dropbox, Google, Microsoft 365, Okta, OneLogin, and Slack.
- **Security Use Cases.** Perhaps you're worried about brute force attacks or successful logins from service accounts (or even guest accounts). BetterCloud will allow you to set up Alerts for successful or unsuccessful login attempts from users and guests.
- **Data Loss Prevention Use Cases.** Through the Files Grid, you're able to see permissions (or sharing settings) for a file. You can answer questions such as "what files have been shared to the public?" Through Alerts, you can begin creating Alerts which will proactively inform you when sharing settings are set or changed. Therefore, if a file should never be shared to the public from Slack, you can set up an Alert that listens for any file shared publicly from Slack. You are also able to create Go-Forward policies, which are *proactive* content scans (covered more in the next section). These look within the body of files to see if any text within the file matches on data you've selected (such as credit card numbers or Social Security Numbers).
- **Remediating Issues with Workflows.** Just as with the user lifecycle management Alerts, you are able to take your System and Custom Alerts, then set them as WHEN events for your Workflows. This will help remediate security and data loss prevention issues by setting up THEN actions, alerting security teams, changing file sharing settings, or resetting passwords as needed.

Explain the Use Cases for the Types of Scans You Are Able to Perform

There are three types of Content Scans you can build in BetterCloud. They are Targeted Content Scans (formerly called Select Scans), File Audits, and Go-Forward Policies. Each serves a different purpose and is set up in a slightly different way. Understanding their differences, and when each should be used, is a critical part of your data loss prevention and security strategies.

Below are some key things to know about the three different Content Scanning types:

- **Files BetterCloud Can Scan.** Regardless of the scan type, BetterCloud is able to scan CSV, DOC, DOCX, PDF, PPT, PPTX, TXT, XLS, XLSX, and Google files (Docs, Sheets, Presentations, Drawings).

- **Scan Capabilities.** BetterCloud provides you with three ways to scan files. You can select from a pre-loaded library of terms, set up RegEx, and type a list of comma separated keywords. You are able to use any combination of all three as part of a content scan.
- **Targeted Content Scans (formerly Select Scans).** These *retroactive* scans are set up from the Files Grid, where you select up to 100 Files. You can mix and match Integrations, sort and filter by owner, and look for suspicious names. Once you've selected the Files you want to scan, you are able to click on Actions, then select Scan Content from the menu (below the BetterCloud heading).
- **File Audit.** A File Audit is a *retroactive* scan that will look at all files without limits. Instead of setting these up from the Files Grid, they will be set up from the Data Protection > Content Scanning section of BetterCloud. Want to scan every single file in Box, Dropbox, Google Workspace, Microsoft 365, and Slack? Go right ahead, mix and match your integrations. A File Audit will look through every file in those Integrations! As with Targeted Content Scans, you're able to select from a list of predefined data, build your own Regular Expression, or write out a list of comma separated Keywords. You can also focus only on specific types of files, based on their metadata. If you'd like to only see Public, Internal, or External files, you can make that selection. Only worried about a specific file owner? No problem! Define the file owner and that owner's files will be scanned.
- **Go-Forward Policy.** While Targeted Content Scans and File Audits are *retroactive*, taking a snapshot of your files and alerting you of issues, Go-Forward Policies are *proactive*. They will inform you whenever a new or edited file is in violation of your content scanning policy. Go-Forward Policies are set up by visiting the Alerts > Manage section of BetterCloud. They allow you to specify the data you are looking for, as well as the metadata that a file should match on (for example, based on Name, Type, etc). Just as with Targeted Content Scans and File Audits, you are able to set up a scan based on predefined data, build your own Regular Expression, or write out a list of comma separated Keywords. However, while Targeted Content Scans and File Audits let you know when a file is in violation ONCE, Go-Forward Policies will start monitoring new and edited files across your Full Integrations, informing you whenever a file is in violation of your policy from the time it is set up. Again, these are PROACTIVE, so they will not evaluate any files that already exist *unless they are edited.* Examples of these policies include the following Alerts...
    - **Files Shared to the Public** from Slack containing Credit Card Information
    - **Files Shared Externally** from Google containing your watermark
    - A **Sensitive Data Scan** (which evaluates files regardless of sharing setting) looking for Social Security Numbers
- **Building Go-Forward Policies Into Alerts.** With your Go-Forward policies set up as Alerts, you can treat them like any other Alert, adding them as your WHEN event in a Workflow. Let's say one of the above Alerts is triggered, and BetterCloud finds your watermark in a file shared externally. Your WHEN event would be the Alert, and the THEN actions could

be things like emailing the file owner, sending a direct message to your security team lead, and removing all external collaborators from the file.

Discovering Applications

Review and correctly note the data points BetterCloud Discover surfaces in the platform

BetterCloud Discover allows you to understand what applications your users are connecting to via different authentication methodologies. Much like the Users, Groups, and Files grid views, the Applications section of BetterCloud provides you with metadata about apps, allowing you to understand that users are accessing applications that may not be allowed or preferred.

Below are some key things to know about BetterCloud Discover:
- **Column Headings:** The following data is surfaced in the Applications section of BetterCloud: Application, Category, Users, Status, Discovered By, Discovered Date, Integration (hidden by default), and Permissions (also hidden by default).
- **Application** is the app which a user (or former user) has signed into with their professional credentials.
- **Category** is set up by BetterCloud to help group apps together.
- **Users** is a list of those employees/accounts who have signed into the application.
- **Status** shows if the application is New, In Review, Sanctioned, or Unsanctioned.
- **Discovered By** can be through Single Sign On (SSO), or SAML.
- **Discovered Date** is when BetterCloud first detected usage of the application.
- **Integration** is the application the app is connected through (for example, DocuSign may be integrated with it's parent, Salesforce. So the Integration will be Salesforce).
- **Permissions** inform you of the level of access the application has into your environment.

When clicking into an Application, you may see a bit of additional information. Some of that information on the Application's page includes…
- **Owner:** Who has been defined as the person responsible for the application in your org.
- **Similar Apps Discovered:** If other applications fall into the same category as the one selected, there may be multiple applications serving the same purpose.

Identify and evaluate BetterCloud Discover's use cases

With the information gathered above, BetterCloud can empower you to make decisions about these applications, set their status, and ultimately decide if these are applications you want your users leveraging.

Below are some key things to know about Discover's Use Cases and how your can leverage it:
- **Revoking Access to an Application:** If a user is leveraging an application you don't like, you can send them an email and communicate the issue right from within BetterCloud, or revoke access to that application (via OAuth).

- **Sanctioning/Unsanctioning:** If your application shouldn't be used, you can change the status of the application, making it "unsanctioned" so all other BetterCloud admins are aware this is not an application to be used by your organization.
- **Finding Similar Applications:** Have you found Trello and Todoist? How about Miro and LucidChart? Slack and Discord? These are all applications that may serve the same purpose for your users, and if you are paying for two applications to do one job, Discover may help you with cost savings.
- **Permissions:** That application can do WHAT?! Permissions allow you to see how an application is accessing your organization's data, which may help you decide if it should be sanctioned or unsanctioned.
- **Integration:** Apps are connecting to each other in different ways, causing a spider web of data. Understanding which applications are talking to each other is key to ensuring your organization's application list is clean and all connections are known.

Audit, Troubleshoot, and Get Support

Describe the Function and Use Cases for BetterCloud's Audit Log
To understand what is happening in BetterCloud, you will need to identify ways to use the Audit Log. BetterCloud's Audit Log captures all of the events that occur within the platform, such as Alerts being created, actions being taken from the Grid Views, and Workflows executing. As with many of the views in BetterCloud, the Audit Log allows you to sort, filter, and search through your records. Columns include things like Event, Type, and Full Text.

Below are some key things to know about the Audit Log:
- **Retained Data.** BetterCloud will retain data within your audit log for as long as you are a customer. While some organizations clear logs after 90 days, a year, or two years, BetterCloud keeps a full history of your activity within the Audit Log.
- **Exporting Data**. One of the most common use cases for the Audit Log is the ability to export your data. You can add filters, then export your data, or you can select all your rows and export the full Audit Log. You will be able to export up to 10,000 records.
- **Understanding Activity.** When sorting and filtering by Actor, you are able to see who took what actions within the platform. When an action is taken automatically, the "Actor" is recorded as the person/account who created the Workflow. However, when events are run as a one-off, including On-Demand Workflows, the person who executed the Action is recorded as the Actor.

Receive Support Through Documentation and Live Chat
If you end up needing a hand and something is not going as expected within the platform, you can get support from BetterCloud. This comes in two forms: support documentation and a live chat. Both of which will help you get to the root of your issue.

Below are some key things to know about getting support in BetterCloud:
- **Help, I Need Somebody!** If you want to talk to someone right then and there, BetterCloud's live chat connects you with a Support Specialist. BetterCloud does not use chatbots, so you will have someone walking you through your issue(s) from Monday to Friday, 9am-8pm EST.
- **How Can I Get Documentation?** You can get documentation or open a support ticket by clicking on the Support option within the Navigation pane. All of the support documents you see here can also be found on support.bettercloud.com. The website, support.bettercloud.com, also contains training videos and will bring you right to your open tickets.
- **Supporting Support with Job ID.** Related to the Audit Log, getting BetterCloud's Support team your Job ID is extremely helpful! This Job ID is not a standard column, but when you add it, you'll see the specific ID for the action that took place in BetterCloud. If you are running into issues, Job ID can help Support quickly discover your issue.

Analyze and Troubleshoot Workflows from the Workflow Results Page

When you'd like to do some of your own [troubleshooting of Workflows](#), you can check out it's results. This is retrieved when you go to Workflows > Manage, then view the results of a Workflow. Here you can see if Workflows were Successful, or if they Completed With Errors.

- **Another Helpful Item: Instance ID.** When a Workflow runs and has errors (or fails), it will have a unique Instance ID. Similar to Job ID, this will help Support look up the issue in BetterCloud's backend systems, getting raw logs from the Integrations with responses to API calls. This is retrieved when viewing Workflow results.
- **What Are the Workflow Statuses?** As mentioned above, a Workflow can provide a Success message, meaning that all Actions in the Workflow executed properly, or it may have Completed With Errors, meaning that some Actions in the THEN section were skipped or failed. In this case, you'll want to review the Actions that took place to see if a skipped Action was expected, or could be an error within the Workflow itself.
- **Reasons Why an Action May Be Skipped.** Actions may skip or fail for a variety of reasons. Perhaps you are trying to create a user in an application, and you do not have the version of the application that allows you to provision users into the application. BetterCloud will not get around this issue for you, and you will still be limited to the restrictions the target application places on you. Another reason is there was an error in the Properties of an Action. Perhaps you missed a required field, or a field was filled in with an incorrect value. For example, you may want to add a user to the "All employees" Asana Group. However, if you enter the name of the Group as "All employeeees," that Group will not be able to be found, and the Action will skip.

Questions? Feedback?

If you have any questions about the exam, please contact cte@bettercloud.com. Having technical issues with your version of BetterCloud? Feel free to use Live Chat, or email support@bettercloud.com.