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Security Awareness Training

ESSENTIALS SECURITY AWARENESS

Administrator Guide

April 2020

IRONCOVE SOLUTIONS

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OVERVIEW

This guide is designed to walk you through the basic setup and creation of a training assignments and phishing campaigns.

TRAINING ASSIGNMENTS

You can create scheduled and duration-based training assignment. Training assignments consist of one or more training modules. The training modules may contain lesson challenges for the user to complete.

CREATING A SCHEDULED TRAINING ASSIGNMENT

A Scheduled Training Assignment has a set Start and Due Date and users are added to the training assignment.

Use the steps below to create a Scheduled training assignment.

1. Click **Training** from the top menu bar.
2. Click the **Scheduled** tab under Manage Training Assignments.
3. Click +**Create Assignment**.

4. Enter a unique **Name** for the new training assignment. This name is used internally to identify the assignment and will not display to the end user. It will appear on reports and on the Scheduled Assignment table for reference.
5. The **Type** defaults to **Scheduled**.

> **Note:** If you change your mind at this point and you want to add a duration-based training assignment, select **Duration** from the drop-down list. The fields on the page will change accordingly. Refer to [Creating a Duration Training Assignment]() for more information.

6. Select the **Start date** users will be able to access this assignment.

   > **Notes:**
   >
   > - If you are using email notifications, the email will be sent at 12:01 AM Eastern Time on the selected date.
   > - If the start date is today, the assignment notification will go out within 30 minutes of creation.
   > - If you do not want the notification to be sent immediately, set the Start Date in the future.

7. Select the **Due date** by which the assignment must be completed.

   > **Notes:**
   >
   > - This is the date that is marked as the deadline for users in their **My Training** view.
   > - It is also when the Assignment is closed and no further users or groups can be added to it.
   > - There is a 30-day grace period for users to continue taking the assignment after the due date

8. In the **Notifications** section, select a **Training assignment** and **Training assignment completion** notification options from the drop-down list. You can choose to not send a notification, always send the active notification, or select the default notification.

   > **Note:** If the default notifications were selected, you have the option to click the **Preview Template** link to view the template and/or send a test email to a specified email address.

9. If you want to create a reminder email(s) to be sent out to users, click **+Create Reminder**, select the reminder type to send, and enter the **Send Date(s)**. If no reminders are needed, skip this section and go to the Modules section.

   > **Notes:**
   >
   > - You can schedule to send the same reminder on multiple days by separating the values with a comma. For example, if you want a reminder email sent out on June 15 and June 20 then enter Jun-15-2019, Jun-20-2019.
   > - You can add as many reminders as you would like up until the end date.
   > - You can have different reminders go out on different days but only one reminder can be active at a time.
   > - Reminders that have previously been sent out will be listed at the top.
   > - Only users who have not completed training will receive the reminder notifications.

10. In the **Modules** section, if you want all modules in this assignment to be completed prior to any other assignment in the user's training list, then select the **High priority assignment** check box. Otherwise, leave it blank. Assignments that are not marked as a high priority will be locked until all high priority ones are completed first.

11. Optionally, you can search, filter and sort the Available Modules list to locate the desired modules by:

- Typing all or part of the module name in the **Search Box** above the module list. As you type, modules matching the search criteria entered thus far will begin displaying. To clear contents entered in the box, click the X at the end of the search box.
- Clicking the **Filter** icon to filter the list by Custom Modules, Licensed Modules, or All Modules.
- Clicking the **Sort** icon to sort the list in ascending or descending order alphabetically or by module lesson count.

12. Under **Available Modules**, click the **plus sign (+)** sign next to each module or double-click the module name to add it to the **Included Modules** list on the right. You can only select one module at a time. The number of lessons in each module displays to the right of the module name.
13. If you want the modules to show in a specific completion order, select the **Enforce module completion order** box, and use your mouse to click on and drag the modules up and down into the appropriate order.
14. In the **Users** section, click on the box(es) next to the user(s) you want to add to the assignment. If you click in the check box next to **Email**, you can also select or deselect all of your users or select or deselect all users on the specific page.

> **Notes:** You can click the **Filter** icon to narrow the list of users based on Date Range (when the user was added to the system) and Groups. For Date Range, either:
>
> - Select one of the existing blue links (Today, Last 7 Days, or Last 30 Days);
> - Select a date range using the calendar by clicking on the first date and the last date of the range; or
> - Enter the date or date range in the textbox. If you enter a date in the textbox, use the MMM-DD-YYYY (three-character month abbreviation followed by a hyphen, then the two-digit date followed by a hyphen, and then the four-digit year). For example, May-13-2019. If adding a date range, add a space after the first date in the range followed by a hyphen and then the ending date in the range. For example, May-13-2019 - May 16-2019.

15. Click **+Add to Assignment**.
16. Click **Submit**. Your assignment now displays in the **Manage Training Assignments** table.

CREATING A DURATION TRAINING ASSIGNMENT

A duration-based (Duration) Training Assignment is designed to support long-running assignments, like new-hire training, where you need the assignment itself to be on-going while the users (such as, new hires) assigned to it are ever changing.

Since Duration assignments don't have a specific start and end date, the user's training assignment start and end dates need to be determined differently using the Enrollment Delay and Assignment Due Within fields. You will set the number of days after the user is added to the assignment in the Enrollment Delay field to trigger when the person will be enrolled in the training assignment as the Start Date. Then, you need to set the number of days after enrollment in the Assignment Due Within field to calculate the Due Date for the assignment. The system will automatically calculate and display the appropriate start and due dates for each user's training assignment. For example:

- ➢ User is added to assignment……May 1st
- ➢ Enrollment Delay setting…………7 days
- ➢ User's assignment Start Date……May 8th
- ➢ Assignment Due Within setting…10 days
- ➢ User's assignment Due Date……..May 18th

This type of assignment differs from Scheduled Assignments where each assignment has a set start and end date.

Use the steps below to create a Duration-based training assignment.

1. Click **Training** from the top menu bar.
2. Click the **Duration** tab under Manage Training Assignments.
3. Click **+Create Assignment**.

4. Enter a unique **Name** for the new training assignment. This name is used internally to identify the assignment and will not display to the end user. It will appear on reports and on the Scheduled Assignment table for reference.
5. The **Type** defaults to **Duration**.

   Note: If you change your mind at this point and you want to add a scheduled training assignment, select **Scheduled** from the drop-down list. The fields on the page will change accordingly. Refer to Creating a Scheduled Training Assignment for more information.

6. For **Enrollment Delay**, enter the number of days after the user is added to the assignment that enrollment begins (the Start Date). The value must be a whole number and can be zero. If zero is used, enrollment begins within 30 minutes of creation.

> **Note:** If you are using email notifications, the email will be sent at 12:01 AM Eastern Time on the selected date

7. For **Assignment Due Within**, enter the number of days after the user is enrolled that the assignment is due. This is the date that is marked as the Due Date for the user in their My Training view.

> **Note:** There is a 30-day grace period for users to continue taking the assignment after the due date.

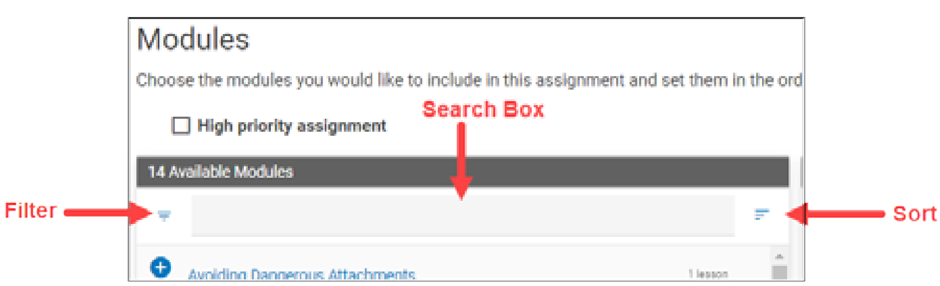
8. In the **Notifications** section, select a **Training assignment** and **Training assignment completion** notification options from the drop-down list. You can choose to not send a notification, always send the active notification, or select the default notification.

> **Note:** If the default notifications were selected, you have the option to click the **Preview Template** link to view the template and/or send a test email to a specified email address.

9. If you want to create a reminder email(s) to be sent out to users, click **+Create Reminder** and, in the **Reminder(s) Sent After** box, enter the number of days after the user is enrolled in the assignment to send out reminder email. If no reminders are needed, skip this section and go to the Modules section.

> **Notes:**
>
> - You can schedule to send the same reminder on multiple days by separating the values with a comma. For example, if you want a reminder email sent out 3 days after, 5 days after, and 7 days after enrollment, then enter 3, 5, 7.
> - You can add up to one reminder for each day for the length of the assignment (the Assignment Due Within days).
> - You can have different reminders go out on different days.
> - Reminders that have previously been sent out will be listed at the top.
> - Only users who have not completed training will receive the reminder notifications.

10. In the **Modules** section, if you want all modules in this assignment to be completed prior to any other assignment in the user's training list, then select the **High priority assignment** check box. Otherwise, leave it blank. Assignments that are not marked as a high priority will be locked until all high priority ones are completed first.
11. Optionally, you can search, filter, and sort the Available Modules list to locate the desired modules by:



- Typing all or part of the module name in the **Search Box** above the module list. As you type, modules matching the search criteria entered thus far will begin displaying. To clear contents entered in the box, click the X at the end of the search box.
- Clicking the **Filter** icon to filter the list by Custom Modules, Licensed Modules, or All Modules.
- Clicking the **Sort** icon to sort the list in ascending or descending order alphabetically or by module lesson count.

12. Under **Available Modules**, click the **plus sign (+)** sign next to each module or double-click the module name to add it to the **Included Modules** list on the right. You can only select one module at a time. The number of lessons in each module displays to the right of the module name.
13. If you want the modules to show in a specific completion order, select the **Enforce module completion order** box, and use your mouse to click on and drag the modules up and down into the appropriate order.
14. In the **Users** section, click on the box(es) next to the user(s) you want to add to the assignment. If you click in the check box next to **Email**, you can also select or deselect all of your users or select or deselect all users on the specific page.

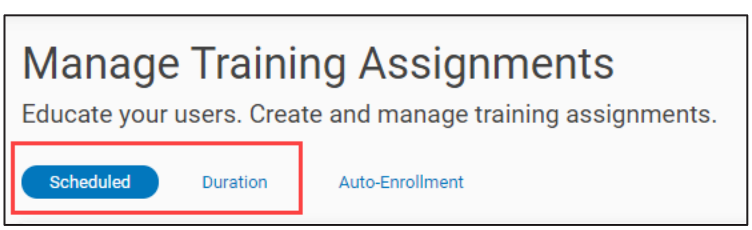
> **Notes:** You can click the **Filter** icon to narrow the list of users based on Date Range (when the user was added to the system) and Groups. For Date Range, either:
>
> - Select one of the existing blue links (Today, Last 7 Days, or Last 30 Days);
> - Select a date range using the calendar by clicking on the first date and the last date of the range; or
> - Enter the date or date range in the textbox. If you enter a date in the textbox, use the MMM-DD-YYYY (three-character month abbreviation followed by a hyphen, then the two-digit date followed by a hyphen, and then the four-digit year). For example, May-13-2019. If adding a date range, add a space after the first date in the range followed by a hyphen and then the ending date in the range. For example, May-13-2019 - May 16-2019.

15. Click **+Add to Assignment**.
16. Click **Submit**. Your assignment now displays in the **Manage Training Assignments** table.

EDITING A TRAINING ASSIGNMENT

Use the steps below to edit training assignment information.

1. Click **Training** from the top menu bar.
2. Depending on the type of assignment you want to delete, click the **Scheduled** or **Duration** tab.



3. Click the **Assignment Name** link.
4. On the Edit Assignment page, make the necessary changes.

   > **Note:** Users cannot be added after the due date has passed.

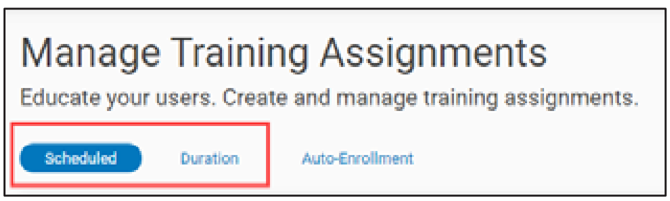
5. Click **Submit**.

DELETING A TRAINING ASSIGNMENT

You can delete a Scheduled or Duration training assignment from the Manage Training Assignment page or the Edit Assignment page.

Use the steps below to delete a Scheduled or Duration training assignment from the Manage Training Assignments page.

1. Click **Training** from the top menu bar.
2. Depending on the type of assignment you want to delete, click the **Scheduled** or **Duration** tab.

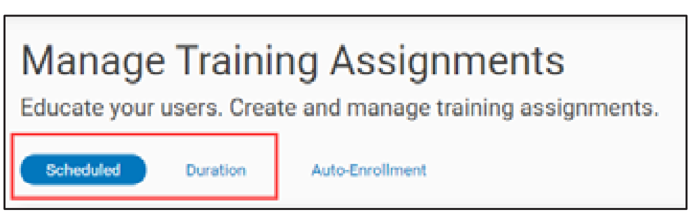


3. Click the box next to the **Assignment Name** to be deleted and click **Delete**.

4. When the confirmation message displays, click **Confirm** to delete the assignment.

Use the steps below to delete an assignment from the Edit Assignment page.

1. Click **Training** from the top menu bar.
2. Depending on the type of assignment you want to delete, click the **Scheduled** or **Duration** tab.

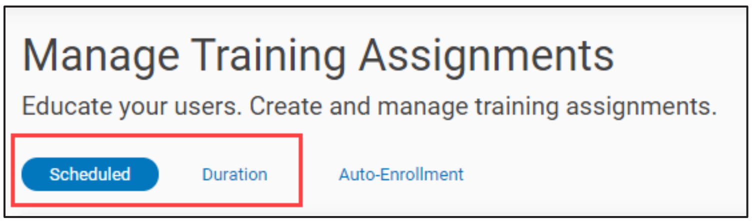


3. Click the **Assignment Name** link.
4. On the Edit Assignment page, scroll to the bottom and click **Delete Assignment**.
5. When the confirmation message displays, click **Confirm** to delete the assignment.

DELETING A TRAINING REMINDER

Use the steps below to delete a reminder from a scheduled or duration training assignment.

1. Click **Training** from the top menu bar.
2. Depending on the type of assignment you want to access, click the **Scheduled** or **Duration** tab.



3. Click on the **Assignment Name** link in the table.
4. On the Edit Assignment page, scroll down to the **Notifications** section.
5. Locate the Reminder to be deleted and click the **Delete Reminder** link underneath it. The reminder will be immediately deleted.
6. Scroll down and click **Submit**.

PHISHING CAMPAIGNS

Phishing campaigns test your organization's susceptibility to a variety of phishing and spear-phishing attacks. The phishing templates are based on current lures spotted "in the wild" by Proofpoint's industry-leading threat intelligence. The phishing threats that you can select from include ones with malicious links, requests for personal data, or embedded links.

When a user falls for the phish, you can select a Teachable Moment to display to the user when the file is opened or when personal information is entered. Teachable Moments:

- educate the user on how to avoid falling for these phishes or using bad USB devices;
- contains an Acknowledge button to track if the user read the Teachable Moment or just closed out the page; and
- can be customized in the Teachable Moment Library.

You can create different types of phishing campaigns using. Each is described below. The first four types are created using the same basic steps.

Drive-by Campaign	This campaign tries to get the user to click on a link to a simulated malicious website. When the user clicks the link, they are forwarded directly to a Teachable Moment. Refer to

	Creating a Drive-by, Data Entry, Classic Attachment or Attachment Campaign for more information.
Data Entry Phishing Campaign	This campaign tries to get the user to enter in their credentials or other information into a fake web site. Users are then sent to a Teachable Moment. **Note:** Passwords are not collected. Refer to Creating a Drive-by, Data Entry, Classic Attachment or Attachment Campaign for more information.
Classic Attachment Phishing Campaign	This campaign tries to get the user to open a simulated malicious DOC or HTML file attachment. When the user opens the file, a customized attachment displays. Refer to Creating a Drive-by, Data Entry, Classic Attachment or Attachment Campaign for more information.
Attachment Phishing Campaign	This campaign tries to get the user to open a simulated malicious PDF, DOCX or XLSX file attachment. When the user opens the file, a Teachable Moment or a standard message with a link to the Teachable Moment automatically displays. Refer to Creating a Drive-by, Data Entry, Classic Attachment or Attachment Campaign for more information.

CREATING A DRIVE-BY, DATA ENTRY, CLASSIC ATTACHMENT OR ATTACHMENT CAMPAIGN

These phishing campaigns try to get the user to click on a link to a simulated malicious website, enter personal information, or click on a file attachment to open it. When the user executes any of those actions, a Teachable Moment message displays.

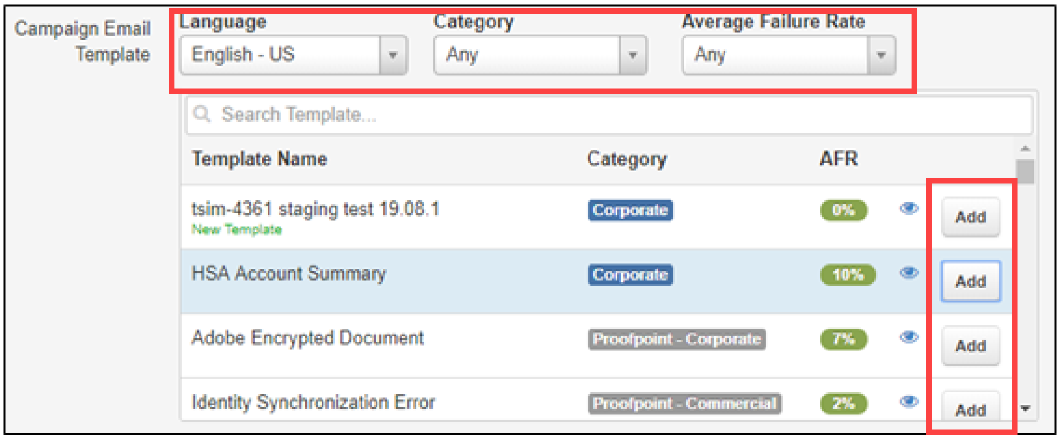
Use the steps below to create a Campaign.

1. Click **Phishing** from the top menu bar.
2. Click **New Campaign**.
3. Depending on the type of campaign you're creating, click one of the following buttons:
   - **Drive-by phishing campaign**
   - **Data Entry phishing campaign**
   - **Classic Attachment phishing campaign**
   - **Attachment phishing campaign**
4. Type the name of the campaign in the **Campaign Title** field. This field is required and must be unique. End users will not see the campaign name, so make it relevant and obvious to yourself and other administrators so it is easily to locate and identify.
5. For the **Campaign Email Template** section, select one or more Phishing Templates by clicking the **Add** button next to the desired Template Name. The templates will appear in the Selected Templates list.

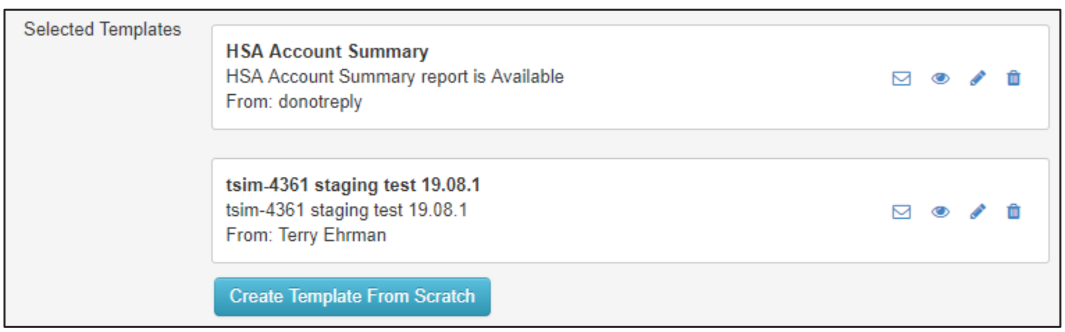
   > **Note:** You can create a simulated phishing campaign containing any number of email templates. Doing this reduces the likelihood that end users will alert others to your campaign, which helps maintain campaign data integrity. When used with Random

Scheduling below, recipients are more likely to receive different phishing emails on different dates and times, all within the same campaign. This provides the purest test of end user susceptibility to phishing attacks.

➢ ***Tip:*** You can filter the list using the Language, Category and Average Failure Rate (AFR) drop-down lists. For example, if you want to pick a template with a lower failure rate, sort on the AFR column.

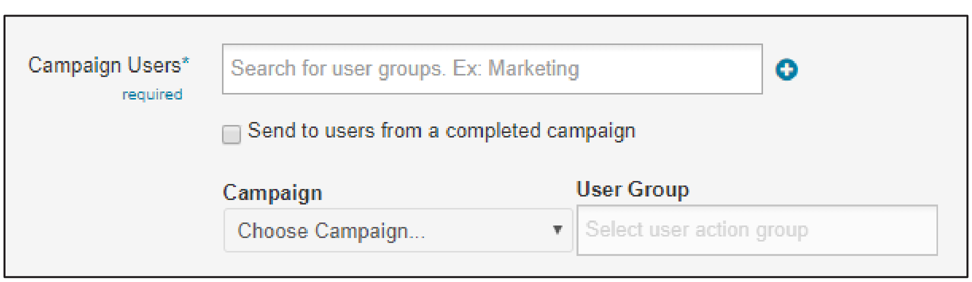


6. If needed, you can edit an email template from the Selected Templates list or create one from scratch. Refer to [Editing a Phishing Campaign Email Template]() for more information on editing an email template.



7. Add **Campaign Users** (user groups or properties) by clicking the **plus + icon** to view and select email groups and lists for the campaign.

   Note: The **Send to users from a completed campaign** checkbox is used if you want to create follow-up campaigns based off how the users performed in a previous campaign. Refer to [Creating a Follow Up Campaign]() for more information.



8. Select the **Phishing Link Teachable** Moment that will display to the user after the failed phish user by doing the following:

➢ ***Tip:*** To view the Teachable Moment in full screen, click its graphic in the Teachable Moment details section. This lets you review and evaluate the entire Teachable Moment that will be displayed to your end user. The Language drop-down in the upper right corner of the full screen layout can be used to select a different language in which to view the message.

Category	View all categories of Teachable Moments from the library or filter the list by selecting one category.
Language	View all languages available for the category of Teachable Moments selected or choose a language from the list to only view the Teachable Moments available in that language. **Note:** Language will default to the regional settings in the user's browser. If Multilingual is selected, the user will be able to select the language from a Language drop-down list in the upper right corner of the Teachable Moment.
Specific Teachable Moment	Select the desired Teachable Moment from the list. If you select Custom, enter the training URL for it in the **Custom URL** where your users will be directed.

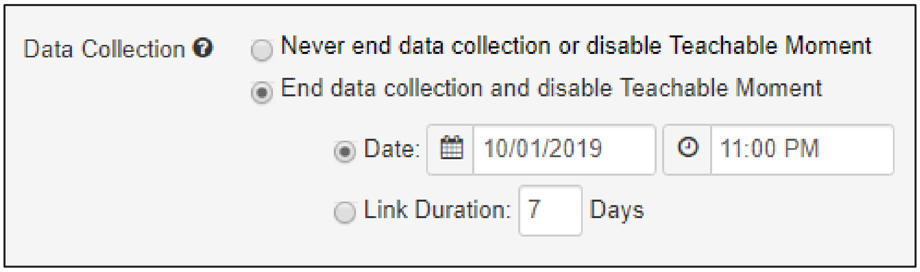
9. If you want to automatically enroll users into training modules when they fail the campaign conditions, select the **In-Depth Training Auto-Enrollment** checkbox. When this box is selected, do the following:

Assignment Name	Enter a name to identify the collection of training modules users will be required to complete
Training Modules	Click the checkboxes next to each Training or Custom Module that you want to include in the assignment.

10. In the **Data Collection** section, select how long you want to collect click data and how long you want to continue presenting Teachable Moments to users.

- **Never end data collection or disable Teachable Moment:** Select this option if you always want to collect data.

- **End data collection and disable Teachable Moment:** Select this option if you want to establish a start date/time or a link duration (number of days) based on when the email was sent to the user.



11. In the **Scheduling** section, set up the distribution schedule for this campaign. If you leave the checkboxes blank, the campaign will begin sending phishing emails immediately after saving it. Or, you can choose one of the options below for the campaign's schedule.
    - **Schedule Campaign:** Select this option if you want to enter a specific date and time when the phishing campaign emails to start.
    - **Random Scheduling:** Select this option if you want emails to go out randomly to users over the time frame set up, which is a good practice since it helps limit your users from alerting each other about the phishing email. This option enables you to add multiple email templates to the campaign. Choose the days of the week, time period, and date range when the campaign will send out emails. **Note:** If you set a Data Collection End date in the previous step, the Ending date for this field must be after it.

12. You can disable the detection of various browser plugin versions on a per-campaign basis. Select the checkbox(es) next to the desired Plugins in the **Plugin Detection** section. Click **More Info** on the page for additional details about this option.

13. The Network Checks **Weak Network Egress Detection** option is not selected by default. You can check the permissiveness of your user network(s) when a user clicks on a campaign link or opens an attachment from our attachment campaign. For detailed information on this option, go to Community and search for the article on weak network egress detection.

14. For User Data Options, select the **Anonymize User Data in Results** box if you want to anonymize the user data so that individual users cannot be identified, such as for GDPR compliance, if applicable.

    Notes: Selecting to anonymize the data:
    - Affects high level reports.
    - Is on a campaign by campaign basis.
    - Anonymizes First Name, Last Name and Email Address in reports.
    - User data is still shown under Advanced User Management.
    - Does not obfuscate data at the database level.

15. For Email Tracking Options, the **Track Email Opens** option is selected by default. This enables the system to track the emails where the user opened the email and downloaded the embedded remote images. Keeping this option checked is recommended.

    Note: Disabling this option will prevent tracking if an end user opens an email.

16. Click **Save Draft**.

17. Navigate to **Campaigns** > **Draft Campaigns**.

18. Click the **pencil icon** next to campaign name to edit it.

19. In the **Selected Templates** section of the **Campaign Details** page, click the **envelope icon** to send a test email. A message quickly displays letting you know that a test email is being send to your email account.

20. Review the test email and make any necessary changes.

21. When the campaign is ready to finalize, click **Create Campaign**.

22. Click **Create Campaign** again on the confirmation window to finalize the creation process.

CREATING A FOLLOW UP CAMPAIGN

Creating a follow-up campaign allows you to quickly and easily send out a new campaign without having to view reports and manually create new groups based on actions taken in previous campaigns.

Use the steps below to create follow-up campaigns based off how users performed in a previous campaign.

1. Click **Phishing** from the top menu bar.
2. Select the type of **Campaign** you wish to create.
3. Follow normal campaign creation process from Creating a Drive-by, Data Entry, Classic Attachment or Attachment Campaign, except do the following in the **Campaign Users** section:
    a. Check the **Send to users from a completed campaign** box.
    b. Select the Campaign from the drop-down list.
    c. Remove any unwanted actions from the **User Group** field.

The summary row will confirm the number of users to whom the new campaign will be sent.

WORKING WITH A CAMPAIGN

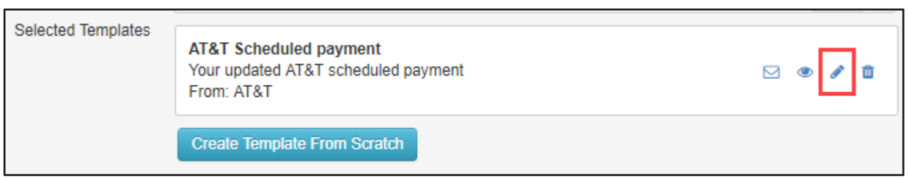
This section discusses how you can edit, clone, cancel, archive, restore, and delete a phishing campaign.

- Editing Data Entry Campaign Landing Page
- Editing Campaign Members
- Cloning a Campaign
- Canceling a Campaign in Progress
- Archiving a Campaign
- Restoring (Unarchiving) an Archived Campaign
- Deleting a Campaign

Editing Data Entry Campaign Landing Page Content

Use the steps below to edit the contents of the Data Entry Landing page of a Data Entry campaign.

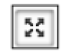
1. Click **Phishing** from the top menu bar.
2. Select the **Campaign** you wish to edit.
3. In the Selected Templates section, click the **pencil** icon of the template you wish to edit.



4. Click the **Message** tab.
5. Scroll down to the **Landing Page** section and click the maximize  button to view the section in full screen mode.

6. Use the text editor options to modify the text as needed. For example, you can change or bold text, delete content, or import your own images.

   IMPORTANT! Be careful with your edits! If you change the code associated with the button, it will prevent the campaign from running effectively.

7. Once you're finished editing the Landing Page content, click minimize  button to exit full screen mode.
8. Click **Send Test Email** to send a test email to the email address listed on the screen.
9. Click **Save** at the top of the screen.

> **Note:** To prevent our cloned web pages from being marked as phishing sites by third-party URL crawlers, we expire the URL for the data entry landing page 30 seconds after it is initially clicked. Future clicks that occur after the 30 second time (or multi-clicks) on the data entry campaign URL will display the Teachable Moment but will not display the data entry site.

Editing Campaign Members

You can only edit campaign members ***prior to*** the campaign's Start Date and Time. Once a campaign has started, you are unable edit members.

Cloning a Campaign

You can clone an existing or archived campaign by giving it a new campaign name and modifying its contents, if desired.

Use either option below to clone a campaign.

Option 1

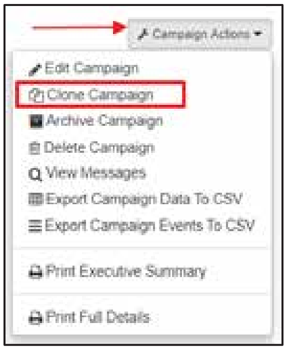
1. Click **Phishing** from the top menu bar.
2. Depending on the type of campaign you're cloning, click one of the tabs for **Active Campaigns** or **Archived Campaigns**.
3. Locate the desired **campaign title** in the table and click the **Clone icon** to its left.

4. The create a campaign window displays where you can proceed with modifying the content as needed for the cloned campaign. If necessary, refer to [Creating a Drive-by, Data Entry, Classic Attachment or Attachment Campaign]() for more information.

Option 2

1. Click **Phishing** from the top menu bar.
2. Depending on the type of campaign you're cloning, click one of the tabs for **Active Campaigns** or **Archived Campaigns**.
3. Click the desired **campaign title** in the table

4. Click the **Campaign Actions** drop-down list, then click **Clone Campaign**.



5. The create a campaign window displays where you can proceed with modifying the content as needed for the cloned campaign. If necessary, refer to <u>Creating a Drive-by, Data Entry, Classic Attachment or Attachment Campaign</u> for more information.

Canceling a Campaign in Progress

Use the steps below to cancel (stop) a campaign already in progress, which cancels all remaining emails.

> **Notes:**
>
> - You cannot pause a campaign. Once it has started, your only options are to cancel or delete it.
> - If you cancel a campaign in progress, you cannot resume it. You can, however, clone the campaign or delete it.
> - Cancelling a campaign will cancel all pending emails from being sent if the campaign is still sending.
> - Data collection will end for users who click on links.
> - Teachable Moments or Data Entry pages will not be displayed.
> - A campaign can be archived and unarchived after it has been cancelled.
> - The canceled campaign can be archived and will display in the Archived Campaigns tab in the Archived Email Campaign History table with the status of "Canceled."

1. Click **Phishing** from the top menu bar.
2. Depending on the campaign type to be cloned, click the **All Email Campaigns** tab.
3. Click the appropriate **campaign title** in the list to open the campaign details page.
4. Click the **Campaign Actions** drop-down list, then click **Edit Campaign**.
5. Scroll to the bottom of the campaign editor and click **Cancel Campaign**. All pending emails will be canceled. Also, data collection for user clicks will end. The campaign's status will be set to Canceled.

Archiving a Campaign

You can archive campaigns and their associated data. Archiving a campaign keeps the information in the system but removes it from the Campaign Overview list and from appearing on reports. Depending on the type of campaign, the information will be listed in the Archived Email Campaign History.

> **Notes:**
> - A campaign can be archived in any state except the "Sending Emails" state.
> - Since auto-enrolled users have 30 days after the end date to complete their assignment, they will still be able to complete their auto-enrollment assignment even after the campaign is archived provided it's within the 30 days.
> - Archiving simply toggles the campaigns within report views.

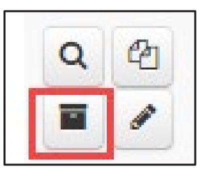
Be aware that, when campaigns are archived, the following will **not** occur:

- Notifications will NOT be sent.
- Data will NOT be collected.
- Teachable Moments will NOT be sent.

Use either option below to archive a campaign.

Option 1

1. Click **Phishing** from the top menu bar.
2. Click the **Active Campaigns** tab.
3. In the **All Email Campaign History** list, locate the appropriate **campaign title** in the table and click the **Archive Campaign** button to its left.

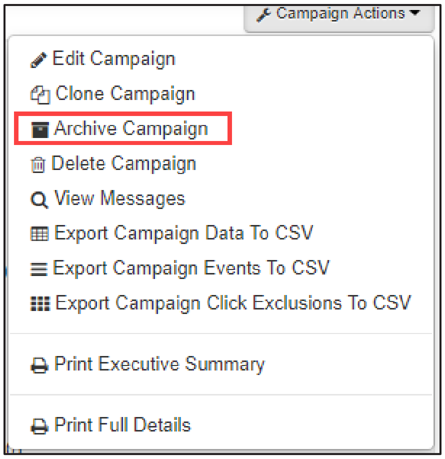


4. A confirmation message displays letting you know that the campaign will be hidden from the campaign overview listing. Click **Archive Campaign** to finalize the archiving process. The campaign will display on the Archive Campaigns tab in the Archived Email Campaign History table.

Option 2

1. Click **Phishing** from the top menu bar.
2. Click the **Active Campaigns** tab.
3. In the **All Email Campaign History** list, locate and click on the appropriate **campaign title** in the table to open the campaign details page.

4. Click the **Campaign Actions** drop-down list, then click **Archive Campaign**.



5. A confirmation message displays letting you know that the campaign will be hidden from the Campaign Overview list. Click **Archive Campaign** to finalize the archiving process. The campaign will display on the Archive Campaigns tab in the Archived Email Campaign History table.

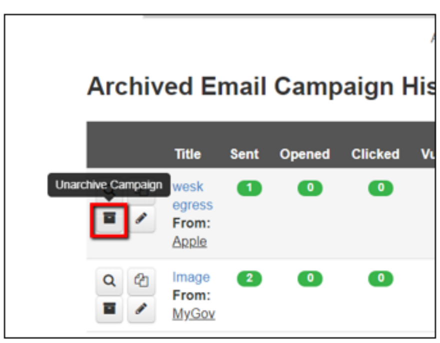
Restoring (Unarchiving) an Archived Campaign

If needed, you can restore (unarchive) the campaign from the archived state to its original state prior to the archive. For example, if the campaign was in a Completed state when it was archived, it will return to a Completed state.

Campaigns that were Pending or Running prior to archiving will return to their status and execute if they still fall within the Start and End Date/Time. If the End Date/Time has been reached, they will be set to a Complete status after being restored (unarchived).

Use the steps below to restore the archived campaign.

1. Click **Phishing** from the top menu bar.
2. Click the **Archived Campaigns** tab.
3. Locate the appropriate **campaign title** in the table and click the **Unarchive Campaign** button to its left.



4. A confirmation message displays letting you know that the campaign will be displayed in the Campaign Overview list. Click **Unarchive Campaign** to finalize the process. The campaign will display on the Active Campaigns tab in the All Email Campaign History table.

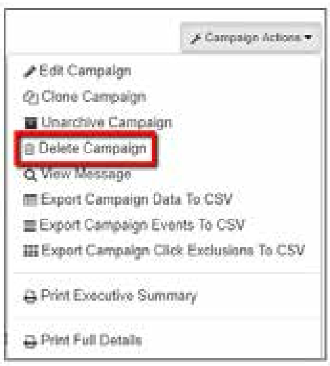
Deleting a Campaign

Deleting a campaign will remove it and all its data from the system and from reports. It's similar to destroying users. It's recommended that you delete a campaign only if there was an error with it and you don't consider the results valid. Otherwise, it is best to archive the campaign to retain all data and allow future analysis to include the data about your employees.

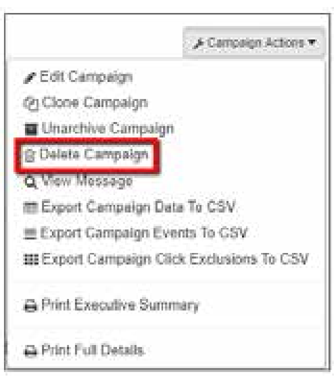
IMPORTANT! All data gathered during the campaign will be completely removed from the system when you delete the campaign.

Use the steps below to delete a campaign from the system.

1. Click **Phishing** from the top menu bar.
2. Depending on which type of campaign you're deleting, follow one of the options below.
   - *For Active Campaigns*
     a. Click the **Active Campaigns** tab.
     b. Click the appropriate **campaign title** in the table.
     c. Click the **Campaign Actions** drop-down list, then click **Delete Campaign**.



     d. Click **Delete Campaign** on the confirmation message that displays.
   - *For Archived Campaigns*
     a. Click the Archived Campaigns tab.
     b. Click the appropriate **campaign title** in the table.
     c. Click the **Campaign Actions** drop-down list, then click **Delete Campaign**.



     d. Click **Delete Campaign** on the confirmation message that displays.

- *For Draft Campaigns*
  a. Click the **Draft Campaigns** tab.
  b. Click the **X button** next to the appropriate title in the table.
  c. Click **Delete Campaign** on the confirmation message that displays.

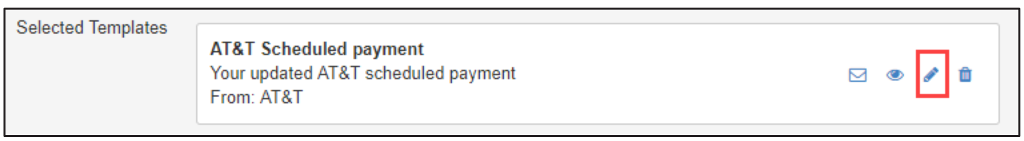
EDITING A PHISHING CAMPAIGN EMAIL TEMPLATE

You can use the content in the email templates as is or, if desired, you can customize them to meet your needs.

Editing a Drive-by Phishing Campaign Email Template

Use the steps below to edit an email template in a new, draft or not started Drive-by Campaign. This type of phishing campaign tries to get the user to click on a link.

1. Click **Phishing** from the top menu bar.
2. Create a new or open a draft or not started Drive-by campaign in edit mode to view the Campaign Details page.
3. In the **Selected Templates** section, click the **pencil icon** next to the desired template to edit it.



4. On the **Settings** tab, you can make the following edits:

Name	Enter a name for the template. This name is for your reference only and is not visible to the end user.
From Name	Enter a name that will appear in the email's From field.
Email Address	Enter a customized email address to be used to send the campaign. Or, you can select the **Use recipient's own email address** option to spoof the recipient's email address. **Note:** If you select this option, the phish will most likely be blocked by your mail filters. Please contact your mail administrator for assistance.
Reply To Email Address	Specify an internal email address if you would like to capture replies.
Email Subject	Enter the content for the Subject line that will appear on the email or use the following substitution strings to customize the subject: • %EMAIL% • %TIME% • %DATE% • %COMPANY%

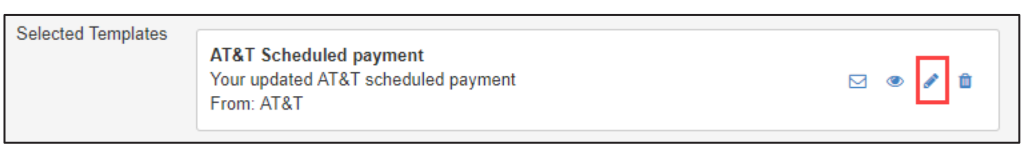
	• %FIRSTNAME% • %LASTNAME% For example, the %FIRSTNAME% and %LASTNAME% strings will enter the user's actual first and last name, making the email look even more legitimate
Landing Domain	Enter the domain for the Landing Page and select the subdomain from the list.
URL	Enter any extra information in the path after URL – subdirectories.
Phishing Link Preview	This field is read-only. It displays the link as it will appear to the end user.

5. On the **Message** tab, you can use the text editor to modify the body of the phishing Email Message that the end user will see. For example, you can make the email message more challenging or more obvious to spot, if desired. Commonly used editing tools on this window include:
    - **Source:** Used to edit the email's HTML source code.
    - **Maximize Edit Window buttons:** Useful when working on lengthy emails.
    - **Phishing Link button:** Used to add a link in template.
    - **Time, Date, and Shorter Date buttons:** Used to enter date and time information relative to your time zone.
    - **Image icon:** Used to upload and resize images in the email body.
6. Optionally, you can click **Send Test Email** to send a test email to the email address listed on the screen and review the information before saving it.
7. Click **Save**.

Editing a Data Entry Phishing Campaign Email Template

Use the steps below to edit an email template in a Data Entry Campaign. This type of phishing campaign tries to get the user to enter their credentials or other private information into a fake website.

1. Click **Phishing** from the top menu bar.
2. Create a new or open a draft or not started Data Entry campaign in edit mode to view the **Campaign Details** page.
3. In the **Selected Templates** section, click the **pencil icon** next to the desired template to edit it.



4. On the **Settings** tab, you can make the following edits:

Name	Enter a name for the template. This name is for your reference only and is not visible to the end user.

From Name	Enter a name that will appear in the email's From field.
Email Address	Enter a customized email address to be used to send the campaign. Or, you can select the **Use recipient's own email address** option to spoof the recipient's email address. **Note:** If you select this option, the phish will most likely be blocked by your mail filters. Please contact your mail administrator for assistance.
Reply To Email Address	Specify an internal email address if you would like to capture replies.
Email Subject	Enter the content for the Subject line that will appear on the email or use the following substitution strings to customize the subject: • %EMAIL% • %TIME% • %DATE% • %COMPANY% • %FIRSTNAME% • %LASTNAME% For example, the %FIRSTNAME% and %LASTNAME% strings will enter the user's first and last name, making the email look even more legitimate.
Landing Domain	Enter the domain for the Landing Page and select the subdomain from the list.
URL Path	Enter any extra information in the path after URL – subdirectories.
Phishing Link Preview	This field is read-only. It displays the link as it will appear to the end user.

5. On the **Message** tab, you can use the text editor to modify the body of the phishing Email Message that the user will see. For example, you can make the email message more challenging or more obvious to spot, if desired. Commonly used editing tools on this window include:
    - **Source:** Used to edit the email's HTML source code.
    - **Maximize Edit Window buttons:** Useful when working on lengthy emails.
    - **Phishing Link button:** Used to add a link in template.
    - **Time, Date, and Shorter Date buttons:** Used to enter date and time information relative to your time zone.
    - **Image icon:** Used to upload and resize images in the email body.

6. The **Landing Page** is the content that will display when the end user clicks the phishing link. You can do one of the following to set up the Landing Page content:
    - **Landing Page section:** If desired, use the text editor to modify the existing content displayed in the Landing Page section or leave it as is. Refer to Editing Data Entry Campaign Landing Page for the steps involved in modifying the Landing Page information, if needed.
    - **Cloned Site field:** Clone a different landing page by entering its full URL in the Clone Site field. The link URL will display to the user as the cloned site, but when the user clicks it, the fake Landing Page displays where their credentials are requested.

    > **Note:** Do not clone sites that you are not authorized to clone.
7. Optionally, you can click **Send Test Email** to send a test email to the email address listed on the screen and review the information before saving it.
8. Click **Save**.

Editing a Classic Attachment Phishing Campaign Email Template

Use the steps below to edit an email template in a Classic Attachment Campaign. This type of phishing campaign tries to get a user to open a simulated malicious DOC or HTML file attachment.

> **Note:** This is not the same as the Attachment Phishing Campaign email template, which is described in Editing an Attachment Phishing Campaign Email Template. It uses DOCX, PDF, or XLSX file attachments.

1. Click **Phishing** from the top menu bar.
2. Create a new or open a draft or not started Classic Attachment campaign in edit mode to view the Campaign Details page.
3. Locate the desired template in the **Selected Templates** section and click the **pencil icon** to edit it.

4. On the **Settings** tab, you can make the following edits:

Name	Enter a name for the template. This name is for your reference only and is not visible to the end user.
From Name	Enter a name that will appear in the email's From field.
Email Address	This lets you customize the email address used to send the campaign. Or, you can select the **Use recipient's own email address** option to spoof the recipient's email address. **Note:** If you select this option, the phish will most likely be blocked by your mail filters. Please contact your mail administrator for assistance.

Reply To Email Address	Specify an internal email address if you would like to capture replies.
Email Subject	Enter the content for the Subject line that will appear on the email or use the following substitution strings to customize the subject: • %EMAIL% • %TIME% • %DATE% • %COMPANY% • %FIRSTNAME% • %LASTNAME% For example, the %FIRSTNAME% and %LASTNAME% strings will enter the user's first and last name, making the email look even more legitimate.
Landing Domain	Enter the domain for the Landing Page and select the subdomain from the list.
Attachment Type	Select the file type for the phish attachment from list (PDF, XLSX, or DOCX). If the attachment is a zip file, check the Zip File box and enter the Password to open the zip file. **Note:** Be sure to include the zip file's Password in the email message if this option is used.
Attachment Filename	Enter a filename for the phishing attachment that the end user will see, or use the following substitution strings to customize it, or leave the field blank to let the system enter a random filename. • %EMAIL% • %TIME% • %DATE% • %COMPANY% • %FIRSTNAME% • %LASTNAME% For example, the %FIRSTNAME% and %LASTNAME% strings will enter the user's first and last name, making the email look even more legitimate.

5. On the **Message** tab, you can use the text editor to modify the body of the phishing Email Message that the user will see. For example, you can make the email message more challenging or more obvious to spot, if desired. Commonly used editing tools include:
    - **Source:** Used to edit the email's HTML source code.
    - **Maximize Edit Window buttons:** Useful when working on lengthy emails.
    - **Phishing Link button:** Used to add a link in template.

- **Time, Date, and Shorter Date buttons:** Used to enter date and time information relative to your time zone.
- **Image icon:** Used to upload and resize images in the email body.

6. The Attachment Content is the information that will display when the user clicks the attachment. You can do one of the following to set up the Attachment Content:
   - **Attachment Content:** If desired, use the text editor to modify the existing content displayed in the Attachment Content section or leave it as is.
   - **Import Custom Training:** You can import one of your custom Teachable Moments into this section by selecting it from the list and clicking **Import Template**.
7. Optionally, you can click **Send Test Email** to send a test email to the email address listed on the screen and review the information before saving it.
8. Click **Save**.

Editing an Attachment Phishing Campaign Email Template

Use the steps below to edit an email template in an Attachment Campaign. This type of phishing campaign tries to get the user to open a simulated malicious PDF, DOCX or XLSX file attachment.

> **Note:** This is not the same as the Classic Attachment Phishing Campaign email template, which is described in Editing a Classic Attachment Phishing Campaign Email Template. It uses DOC or HTML file attachments.

1. Click **Phishing** from the top menu bar.
2. Create a new or open a draft Attachment campaign to view the **Campaign Details** page.
3. Locate the desired template in the **Selected Templates** section and click the **pencil icon** to edit it.

4. On the **Settings** tab, you can make the following edits:

Name	Enter a name for the template. This name is for your reference only and is not visible to the end user.
From Name	Enter a name that will appear in the email's From field.
Email Address	This lets you customize the email address used to send the campaign. Or, you can select the **Use recipient's own email address** option to spoof the recipient's email address. **Note:** If you select this option, the phish will most likely be blocked by your mail filters. Please contact your mail administrator for assistance.
Reply To Email Address	Specify an internal email address if you would like to capture replies.

Email Subject	Enter the content for the Subject line that will appear on the email or use the following substitution strings to customize the subject: • %EMAIL% • %TIME% • %DATE% • %COMPANY% • %FIRSTNAME% • %LASTNAME% For example, the %FIRSTNAME% and %LASTNAME% strings will enter the user's first and last name, making the email look even more legitimate.
Landing Domain	Enter the domain for the Landing Page and select the subdomain from the list.
URL Path	Enter any extra information in the path after URL – subdirectories.
Phishing Link Preview	This field is read-only. It displays the link as it will appear to the end user.
Attachment Type	Select the file type for the phish attachment from list (PDF, XLSX, or DOCX). If the attachment is a zip file, check the Zip File box and enter the Password to open the zip file. **Note:** Be sure to include the zip file's Password in the email message if this option is used.
Attachment Filename	Enter a filename for the phishing attachment that the end user will see, or use the substitution strings below to customize it, or leave the field blank to let the system enter a random filename. • %EMAIL% • %TIME% • %DATE% • %COMPANY% • %FIRSTNAME% • %LASTNAME% For example, the %FIRSTNAME% and %LASTNAME% strings will enter the user's first and last name, making the email look even more legitimate.

5. On the **Message** tab, you can use the text editor to modify the body of the phishing Email Message that the user will see. For example, you can make the email message more challenging or more obvious to spot, if desired. Commonly used editing tools include:
   - **Source:** Used to edit the email's HTML source code.
   - **Maximize Edit Window buttons:** Useful when working on lengthy emails.

- **Phishing Link button:** Used to add a link in template.
- **Time, Date, and Shorter Date buttons:** Used to enter date and time information relative to your time zone.
- **Image icon:** Used to upload and resize images in the email body.

6. Optionally, you can click **Send Test Email** to send a test email to the email address listed on the screen and review the information before saving it.
7. Click **Save**.

Previewing a Phishing Email Template

Use the steps below to preview a Phishing template.

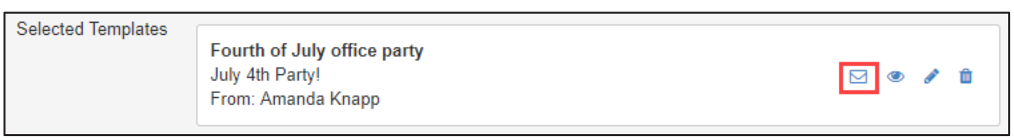
1. Click **Phishing** from the top menu bar.
2. Create a new or open a draft campaign to view the **Campaign Details** page.
3. Locate the desired template in the **Selected Templates** section and click the **eye icon** to preview the template.

4. Review the information and make any necessary changes.

Sending a Test Phishing Email

Use the steps below to send a test phishing email to yourself to review before finalizing or sending out a phishing campaign.

1. Click **Phishing** from the top menu bar.
2. Create a new or open a draft campaign to view the **Campaign Details** page.
3. Locate the desired template in the **Selected Templates** section and click the **envelope icon** to send a test email.



After clicking the envelope icon, a message quickly displays letting you know that a test email is being send to your email account.

4. Review the test email and make any necessary changes. The URL for the data entry landing page will **expire after five minutes** for test emails.

REPORTS

There are number of reporting dashboards available in Security Awareness training that you can reference to see the status of training assignments, phishing campaigns, and user progress. The data can be downloaded to CSV format for use in other business tools.

- Company Training Report Card
- Phishing Campaign Overview Report
- Individual Phishing Campaign Details
- Raw Campaign Data CSV Reports

COMPANY TRAINING REPORT CARD

The Company Training Report Card provides an at-a-glance view of average scores per module, users who are overdue on completing their assignments, and assignment-level summary of users' progress status (not started, in progress, completed) and the completion rate.

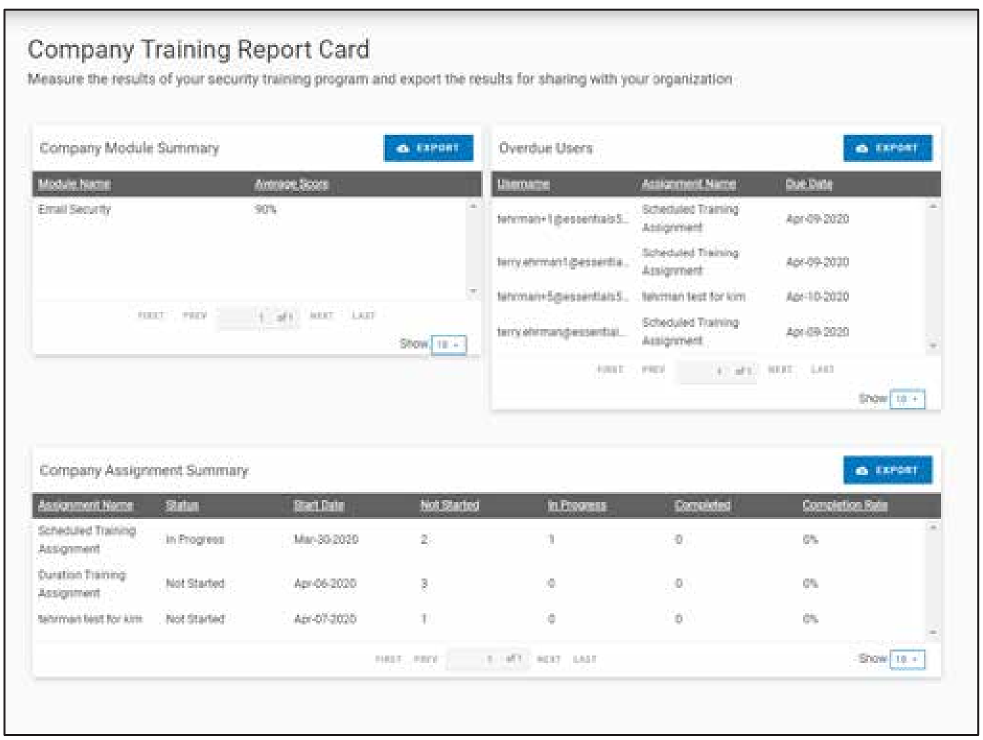
Benefits

- Quickly view the status of your training programs, including progress status (completed, not started, in progress), average scores and completion rates.
- Easily identify the users who are overdue on completing their assignments.

Key Features

- Option to export (download) each section of information to CSV.

To view the Company Training Report Card, click **Reports** in the top navigation bar



PHISHING CAMPAIGN OVERVIEW REPORT

The Campaign Overview Report provides an at-a-glance view into the short-term phishing performance of simulated phishing campaigns and associated user activity. Information displayed includes:

- Click rate
- Multiple clicks
- No response
- Open messages
- Attachment opened
- Users who reported the mock phish
- Users who acknowledged viewing the Teachable Moment
- Browser vulnerabilities
- Compromised users (provided credentials to a fake site)

Benefits

- Quickly view the organization's recent phishing campaign performance, analyze trends, and determine next steps in your program.
- Scan campaign results side-by-side and determine which campaigns are most effective for the organization.

Key Features

- Provides a bar chart of campaigns detailing and comparing the results with the ability to display campaigns over a period of up to a year.
- Displays a list of all the campaigns, overall results, create, start and end dates, status, and creator of each campaign. They can be filtered by status, shown as numbers or percentages.
- Option to Export Campaigns to CSV. Also hamburger menus are available for the charts to save the information to as a graphic (.PNG, .JPEG) file, SVG file, or PDF file.

To view the phishing campaign information:

1. Click **Phishing** in the top navigation bar.
2. From the **Active Campaigns** tab, view the **Recent Campaign** overview chart and **All Email Campaign History**, which provides statistical details about each campaign, including visibility into past, current, and pending campaigns.

INDIVIDUAL PHISHING CAMPAIGN DETAILS

Within the Active Campaigns tab, each campaign can be accessed to provide administrators with statistical details in a variety of reports. You can easily analyze comprehensive details of each campaign to determine riskiest users, geography, IP addresses, devices (desktop vs mobile), and browser plug-in vulnerabilities.

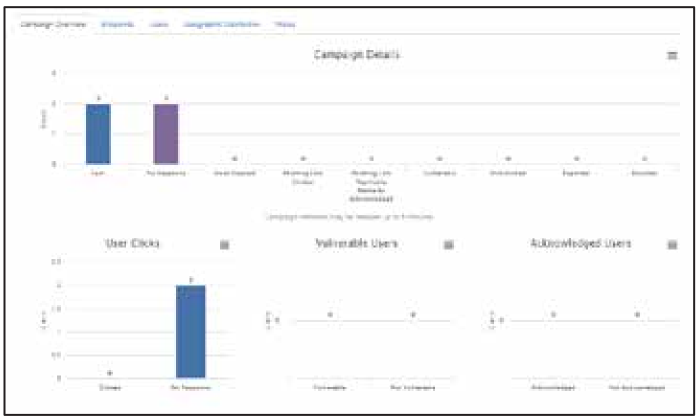
To view individual email campaign information:

1. Click **Phishing** in the top navigation bar.
2. From the **Active Campaigns** tab, click the **title** of an email campaign listed the **All Email Campaign History** table.

> **Note:** Use the hamburger menus ☰ for each chart to save the information to as a graphic (PNG, JPEG) file, SVG file, or PDF file.

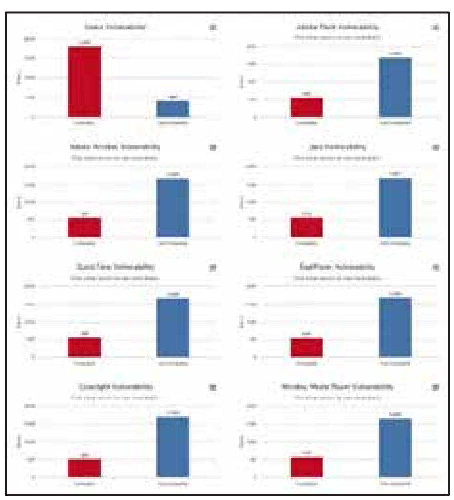
Campaign Overview Report

On the **Campaign Overview** tab, view relevant incident response data such as campaign details at the user level, number of user clicks and no responses, vulnerable and non-vulnerable users, and so forth.



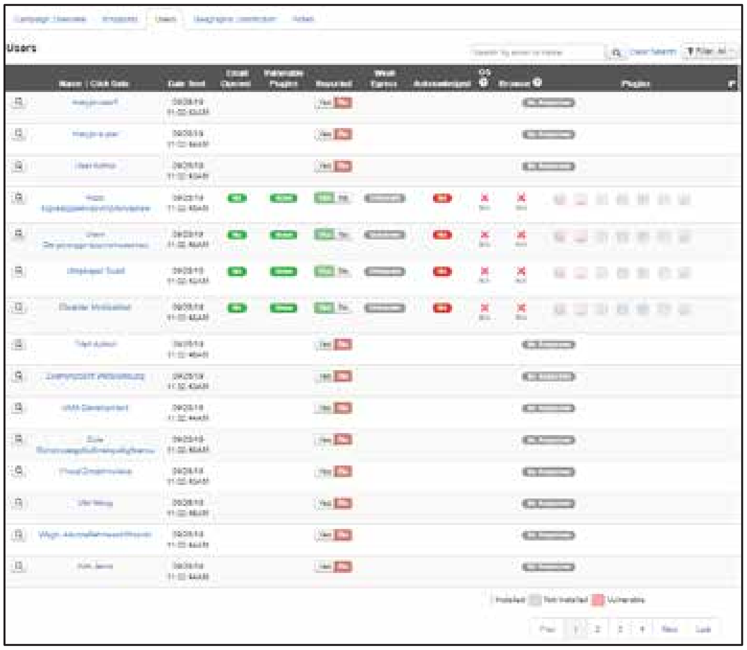
Endpoints Report

On the **Endpoints** tab, view the types of devices (desktop vs. mobile), operating systems, browsers, and browser versions that were used by employees who fell for a mock phishing email. Also reports on out-of-date and potentially vulnerable third-party plug-ins (via the optional Weak Network Egress feature).



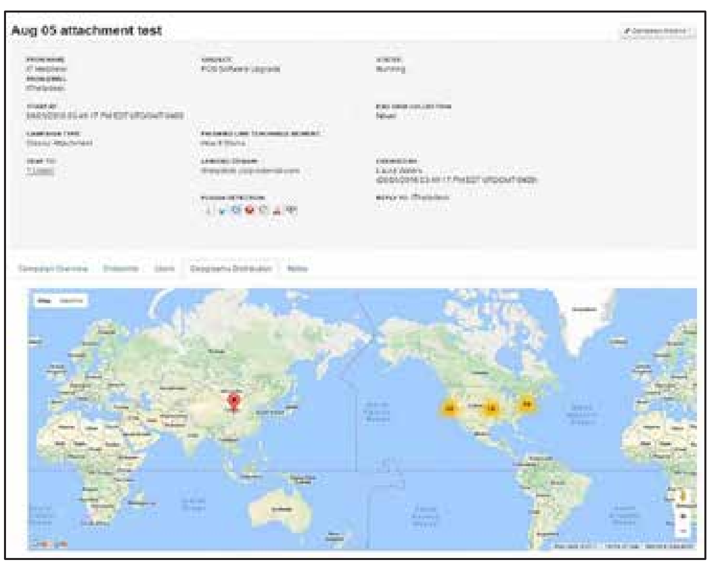
Users Report

On the **Users** tab, click a user's name to view detailed and complete user activity, including clicks, opens, and reported phish. Also identifies out-of-date third-party browser plug-ins and detection of off-end points (via the optional Weak Network Egress feature).



Geographic Distribution Report

On the **Geographic Distribution** tab, view worldwide mapping of user activity per campaign, which helps identify anomalies in the organization's data regions with high levels of susceptibility.



RAW CAMPAIGN DATA CSV REPORTS

The raw campaign data provides user and user's equipment details that are not available in other reports, reflecting all information available on campaigns in one report. Administrators can export all campaign data to CSV and build custom charts based on desired fields and statistics.

Benefit

Simple export of comprehensive data for quick and easy import into the organization's preferred analysis tool for evaluation.

Key Features

- Provides raw data of all campaigns within a selected range, which enables administrators to manipulate and create different charts from the results.
- Displays details about campaigns such as campaign title, type, template used, from name and from email fields, summarized results, and many other fields.
- Export in CSV only.

To view raw campaign data, do the following:

1. Click **Phishing** in the top navigation bar.
2. From the **Active Campaigns** tab, you can do any of the following to generate raw data results:
   - Click the **Export Campaigns To CSV** link alongside the **All Email Campaign History** table. You are given the option to export **Campaign History** or **Campaign Details** for a selected date range.
   - Click the **title** of an email campaign listed the **All Email Campaign History** table. Then, click the **Campaign Actions** button in the upper right and select one of the options: **Export Campaign Data to CSV** or **Export Campaign Events to CSV.** (**Note:** You can also select to view and print an Executive Summary or Full Details report.)