

## How to Create an Address Book

<https://campus.barracuda.com/doc/75696220/>

You must create an Address Book of people who will receive your campaign emails.

There are several ways you can create an Address Book:

- **Import from Microsoft 365** – See **Importing from Microsoft 365** section below.
- **Import from LDAP** – See **Importing from LDAP** section below.
- **Upload a file manually (CSV or XLS)** – See **Importing from a Non-LDAP Data Source** section below.
- **Create the Address Book by hand**, entering one address at a time – See [How to Edit an Address Book](#).
- **Create a Dynamic Address Book**, which the system automatically populates, as part of an Automated Campaign – See [How to Create a Dynamic Address Book](#) and [Understanding Automated Campaigns](#).

Each Address Book is intended to be used with a single campaign. Creating a new Address Book for each campaign helps ensure an accurate list of recipients.

Depending on your data source, the import process is different and is described in separate sections in this article. Processes that are common, like verifying the data import, are described in common sections in this article. Click a section below to expand its content.

Before you can import data from your Microsoft 365 account, you must set up a connector between your Microsoft 365 account and Security Awareness Training.

### Required Access Level

To create the connection, you must have at least User .Read.All permissions, an elevated level of access, in the Microsoft 365 account. If you do not have the adequate access, a screen from Microsoft instructs you to submit the form to ask your organization's Office 365 Administrator for updated credentials. Your Office 365 Administrator can either accept or deny your request. In either case, you will receive an email from Microsoft. If your request was accepted while you were in the middle of Step 4 below, restart that part of the procedure.

To create an Address Book, importing data from an Microsoft 365 source:

1. You must have a configured connector between your Microsoft 365 account and Security Awareness Training.

- If you are unsure if a connector has been configured, go to **System > Microsoft 365 Connection Manager**. All connectors are listed.
  - If you need to configure a connector, follow the steps to [create a new connection](#).
2. Navigate to **Campaigns > Address Books**, then click **New**.
  3. For **Source Type**, select **Microsoft 365**.
  4. Enter a **Name** and optional **Description** for the Address Book.
  5. Click **Save**.
  6. In the **Microsoft 365 Connector** field, select the account you want to use to create this address book.  
Note that most organizations will have only one Microsoft 365 connector.
  7. Optionally specify an Address Book Group name. Each address book can belong to only one group. Groups can contain multiple address books. For additional information, refer to the [Address Book Group](#) section below.
  8. Select the **Active** check box.
  9. Scroll to the **Import Processing** section.
  10. For **Import Action Request**, select **Perform an import when I hit the Save Button**.
- Note:** There is no mapping for this type of address book creation.
11. Click **Save**.

Continue with **Common Operations** sections below and be sure to read the Microsoft 365 section at the bottom of this article.

Before you can import data from your LDAP source, you must map the data between the LDAP source and your Security Awareness Training Address Book.

**Before you perform the steps in this section**, configure data mapping from your Security Awareness Training Address Book to LDAP. Follow the instructions in described in [LDAP/AD Configuration Manager](#).

To create an Address Book, importing data from an LDAP source:

1. After you map the data, navigate to **Campaigns > Address Books**, then click **New**.
2. For **Source Type**, select **LDAP**.
3. Enter a **Name** and optional **Description** for the Address Book.
4. Click **Save**. The page refreshes.
5. In the **General Settings** section, under **LDAP Config Name**, select the name of your LDAP data source.
6. Optionally specify an Address Book Group name. Each address book can belong to only one group. Groups can contain multiple address books. For additional information, refer to the

[Address Book Group](#) section below.

7. Select the **Active** check box.
8. Scroll to the **Import Processing** section.
9. For **Import Action Request**, select **Perform an import when I hit the Save Button**.

**Note**

If you require more time to set up the import, select **Do not import when I hit the Save Button**.

10. Click **Save**.

Continue with **Common Operations** sections below.

### Before You Begin

If you are importing data from an existing *non-LDAP* data source, prepare the data to be imported.

1. In your existing address data source, export the data as a CSV or XLS file.
2. Save the file with a name and location you will remember for importing into Security Awareness Training.
3. Check that the file is not password protected. You cannot import password-protected files into Security Awareness Training. Continue with the instructions in **Importing Data** below.

### Importing Data

To create an Address Book, importing data from a file:

1. Navigate to **Campaigns > Address Books**, then click **New**.
2. For **Source Type**, select **Manual Entry/File Upload**.
3. Enter a **Name** and optional **Description** for the Address Book.
4. Click **Save**. The page refreshes.
5. In the **General Settings** section, optionally specify an Address Book Group name. Each address book can belong to only one group. Groups can contain multiple address books. For additional information, refer to the [Address Book Group](#) section below.
6. Select the **Active** check box.
7. Scroll to the **Import Processing** section.
8. Under **Upload an Import File**, click **Choose File**. Locate the CSV or XLS file you want to import.
9. Map the columns (fields) in the Security Awareness Training Address Book to the corresponding columns in your data file. For example, map the Email Address field to the column in your import file that contains the Email Address data.

**Note**

Mapping the email address field is required for non-LDAP data sources. You will likely also want to map at least First Name, Last Name, and Full Name.

You can choose to specify up to 40 of your columns as **Custom** fields.

A list of field names and their descriptions is at the end of this article.

10. For **Import Action Request**, select **Perform an import when I hit the Save Button**.

**Note**

If you require more time to set up the import, select **Do not import when I hit the Save Button**.

11. Click **Save**.

Continue with **Common Operations** sections below.

## Common Operations

Unless otherwise noted, the following sections describe operations that are common to both LDAP and non-LDAP sources.


### Verifying the Import

After the data is imported, take a moment to verify that the data was imported correctly.

1. When the page refreshes, locate the **Email Addresses** section.



The number displayed represents the number of email addresses in the Address Book. For a brand new Address Book, this is the number of email addresses you just imported.

2. Click **Email Addresses**. The **Detail** tab of the **Email Address Manager** displays.
3. Review the contents of the **Email Address** field and other fields you mapped. If needed, click the Edit button  for a different view of the information. Ensure that the content of each field matches the title of the field. For example, ensure that the contents of the **First Name** and **Last Name** fields are not switched.
4. Email addresses are automatically marked **Active**.
5. If everything looks fine, no further action is required on this Address Book at this time.  
If there is a problem, click **Return to the Address Books** and continue with **Fixing Mistakes** below.

### Fixing Mistakes

You can address any importing issues without having to restart the process.

1. Determine the cause of the problem and take the appropriate action.
  - **Imported file problem** – If the data file from your original data source was blank or had other issues:
    1. Export the file again from the original data source.
    2. Under **Upload an Import File**, specify the new file to upload.
  - **Improper field mapping** – If your field mapping was off and the imported data did not accurately match the field names, map the fields again.
2. For the **Import Action Request**, select **Delete unused email addresses, and then perform an Import when I hit the save button**.  
This action will delete the improperly imported addresses and import only the new data/data mapping that you just specified.
3. Click **Save**.
4. Verify your data as described above.

If you are reimporting data, for the **Import Action Request**, be sure to select **Delete unused email addresses, and then perform an Import when I hit the save button**. This removes the incorrect data and imports the correct data into the Address Book. You will have one accurate copy of each record.

If you select **Perform an import when I hit the Save Button**, as you did in the original import, the incorrectly imported data will remain in the Address Book and the new, corrected data will also be added to the Address Book, resulting in two versions of each record, one correct and one incorrect. If you accidentally choose this option when fixing mistakes, repeat the process using the **Delete unused email addresses, and then perform an Import when I hit the save button**.

## Address Book Fields

This list of fields can help you with the mapping process.

### Notes on fields:

1. Use the predefined fields first, rather than using Custom fields. For example, use the Country field, rather than defining a Custom field to include Country data.
2. It is best to be as consistent as possible so your filters will be applied consistently. For example, if you want to filter for Language Code in your campaign, you might want to specify the filter as **English**. But filtering for **English** will not match any entries using the ISO code of **en**.

## Field Names and Descriptions

Fields imported from Microsoft 365 sources are noted with a ‡ symbol. For Microsoft 365 field names, refer to [Microsoft 365 Connection Manager](#).

- **Email Address** <sup>†</sup> - (Required) Properly formatted email address for this contact.
- **First Name** <sup>†</sup> - First name associated with the contact email address.
- **Last Name** <sup>†</sup> - Last name associated with the contact email address.
- **Full Name** <sup>†</sup> Complete name associated with the contact email address, usually consisting of the first and last name, but can also include a middle name.
- **Personal Title** - Title associated with the contact email address, such as Dr., Mr., Ms., and so on.
- **Name Suffix** - Any descriptors that follow the full name, like Jr., III., Esq., and so on.
- **Hire Date** - The date this user associated with this email joined your organization. **Hire Date** must be in one of the following formats: YYYY-MM-DD, MM/DD/YYYY, DD-MM-YYYY, or YYYYMMDDHHMMSSZ.
- **Organization Area** - Part of the organization, like department or division, corresponding to the email address entry.
- **Organization Level** <sup>†</sup> - Title or management level corresponding to the email address entry.
- **Organization Tenure** - How long the person has been with the organization. Can be a numerical or alphabetical entry.
- **Mobile Phone** <sup>†</sup> - Mobile phone number associated with this contact email address that can be used for text messaging. (The ability to create and run new SMS and/or voice campaigns is currently unavailable in the product.)
- **Phone** - Phone number associated with this contact email address to receive voice messaging. (The ability to create and run new SMS and/or voice campaigns is currently unavailable in the product.)
- **Company** - Name of the organization corresponding to the email address entry.
- **Country** - Geographic country corresponding to the email address entry.
- **Region** - Geographic region where the email address is located, like **EMEA** or **Northeast**. You can also choose to use ISO region codes.
- **Site/Location** <sup>†</sup> - Descriptor for the location of the email address, like **Manufacturing** or **Downtown Branch**.
- **Language Code** <sup>†</sup> - The language code corresponding to this contact email address. This is usually the ISO language code.
- **Timezone** - Time zone associated with this contact email address. The time zone is used to determine when to send campaign emails. (Go to **System > Address Book Time Zone Mapper** to set the time zone.)
- **Street Address** - Geographic street address corresponding to the email address entry.
- **City** - Geographic city corresponding to the email address entry.
- **State** - Geographic state corresponding to the email address entry.
- **Zip Code** - Zip or other postal code for the geographical address corresponding to the email address entry.
- **Source** - The source of the email address. This field can be an Open Source Intelligence source or perhaps data from human resources or a response from a certain marketing campaign.
- **Customer Training URL** - If you are using an external training system, the URL for the external customer training.
- **Manager Email Address** - Email address of this Address Book entry's manager.
- **Manager Name** - Name of this Address Book entry's manager or supervisor.
- **Custom Fields** - Additional information that does not correspond to one of the fields above.

There are 40 available custom fields. Custom fields might have a generic name like **Custom1** or might have a custom name like **Cost Center**. Refer to [Custom Field Naming Utility and Custom Fields](#) for more information.

### Editing an Address Book / Creating Without Existing Data

To make small changes to imported data or to create an Address Book *without* importing data from an existing source, refer to the instructions in [How to Edit an Address Book](#).

- Automatically create a **Dynamic Address Book** as part of an Automated Campaign – See [How to Create a Dynamic Address Book](#) and [Understanding Automated Campaigns](#).

## Additional Information on Microsoft 365 Importing

### Importing Criteria

Security Awareness Training imports all enabled user accounts that meet the following criteria:

- Users must have a valid email address (not including @onmicrosoft.com email addresses)
- Users must have an email address that uses a domain that is authorized in Security Awareness Training. (See Domain Authorization.)
- The account is not an external or guest account.
- The account has an active, provisioned Exchange plan.

### Omitting Users from Campaigns

Depending on how you have configured Microsoft 365, the imports above might include some items that you do not want to include in phishing campaigns (e.g., service accounts, conference rooms).

Before the users are imported, edit the configuration and add specific email addresses to the Email Block List.

For additional information, refer to [Microsoft 365 Connection Manager](#).

## Address Book Groups

This topic is of interest to MSPs who might run a single campaign for hundreds of separate address books.

If you run the same campaign for multiple address books, using Address Book Groups can simplify your process. You can create a single Address Book Group and assign multiple address books to that group. Then, when creating a campaign, you can specify one Address Book Group, rather than specifying hundreds of individual address books.

Create an Address Book Group during the Address Book creation process, described above.



## Figures

1. viewEmailAddresses.png
2. editButton.png

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