Creating and Generating an Email Campaign

https://campus.barracuda.com/doc/75696248/

When you create a campaign, you will specify a schedule and the number of emails you want to send. Security Awareness Training will divide the number of emails into the schedule and create a plan for sending out the emails evenly during the time frame. You also specify the content of the campaign, including links, landing pages, and web servers.

To create a new campaign:

Create the Basic Campaign

1. Navigate to **Campaigns > Campaign Manager**.
2. Click **New**.
3. For the **Campaign Type**, select **Email Campaign**. The **Campaign Type** for a specific campaign cannot be changed later.
4. Select the **Campaign Intent**. Note that the values in this menu are based on the campaign type you select.
   - **Testing** – Most common selection. For a standard phishing campaign, this intent tracks and records results, like click count and message count, in the Program Term data.
   - **Testing (Excluded from Program Statistics)** – For a standard phishing campaign, but does not record the results in the Program Term data.
   - **Education Campaign** – For a campaign designed purely to train users, not to track whether users take any action, like clicking.
   - **Risk Based Surveys** – For a campaign designed solely to collect users' input on a survey.
   - **Announcements** – For a campaign designed solely to push out information, like sending the Click Thinking Newsletter, and not to track user actions.
   - **Immediate Feedback Automated Campaign*** – A campaign that automatically sends an email a user, based on a specified action in another campaign. For example, a user who clicks on a link in another campaign will automatically receive an email inviting them to take a training.
   - **On-Demand Automated Campaign***– Enable the campaign Administrator to send a follow-up email to a manager or employee, based on a specific action in a campaign. For example, you can send an email to a manager letting them know which of their employees clicked a link in a campaign.

   * For details on Automated Campaigns, follow instructions in How to Create an Automated Campaign

   > The system will recalculate Program Term data any time you change the Campaign Intent value. The recalculation time depends on the number of outbound records affected.

5. Enter the following information.
   - **Campaign Name** – Enter a descriptive name for the campaign.
   - **Enable Content Groups** – Select this box if you want to use Content Groups for all content in your email campaign. After you save the campaign, you cannot change his

value.
- **Allow Domains on Block List** – Optional. Select this option to override settings that do not allow campaigns to run with a blocked domain in either a sending email or landing page. Note that emails from blocked domains will likely be blocked from delivery and users will likely not be able to click links to these blocked domains, so your campaign results might not be accurate with this override.
6. Click **Save**. The page refreshes.
7. Optional. Edit the information you entered in Step 5.
8. Optional. Provide the following information:
    - **Description** – Enter text to describe the campaign.
    - **Plan** – Select a plan associated with this campaign. Create and review plans under **Plan > Plan Manager**.
    - **Category** – Enter a category, like **Spear Phishing Simulation** or **Training Reminder**, to associate with this campaign for tracking purposes.
9. Click **Save**. The page refreshes. At the top of the page, you can edit the information you entered in Step 4.
10. **Lifecycle Status** displays **Upcoming**. This is a new campaign and has not yet been activated.

Set the Schedule

In the **Scheduling** section, specify the following information. The system will randomly send campaign emails in the window you define with Start and End Dates.

- **Schedule Based Upon** – Select the time zone for which you want to base the campaign schedule.
    - **Administrator's Time Zone** – Use the time zone you set in **My Preferences** under the profile icon .
    - **Target's Time Zone** – Use the time zone for the target's location, as specified in the Address Book.
- **Start Date** – Select a date and time on which to start the campaign.
- **End Date** – Select a date and time on which to end the campaign, up to one year after the Start Date. Late messages (messages sent out after their scheduled time) can be sent up until the Cutoff Date.
- **Cutoff Date** – Select a date and time when results will no longer be collected for reporting. To ensure that you receive all of the results reporting, specify the Cutoff Date to be *after* the End Date. Having time between the End Date and Cutoff Date provides a cushion to account for factors that might delay a target's interacting with an email, like weekends and vacations.
- **Days of the Week** – Select one or more days of the week on which to send campaign emails.
- **Hour of Day "From", Hour of Day "Through"** – Select a time range during which you want to send campaign messages.

Specify Targets

In the **Targets** section, specify the following information:

- **Emails to Send** – Enter the number of emails you want to send in this campaign. The actual number of emails will not exceed the number of matching Address Book entries – in other words, each email address receives no more than one email from each campaign. If you specify fewer Emails to Send than the number of matching email addresses, the system will randomly select email addresses to receive the emails.
  Example: There are 50 matching email address entries. If you specify 50 emails to send, each address will receive an email. If you specify 20 emails to send, 20 of the email addresses will be randomly selected to receive the email.
  - **Set to X Matching Email Address Entries** – Click this shortcut button to set the **Emails to Send** based on the number of matching email address entries from your selected Address Books with Advanced Filters applied.
- **Use Address Book Groups** – Optional. Select to use a single Address Book Group, rather than specifying a large number of individual address books. Then select the specific Address Book Group below. For additional information about Address Book Groups, refer to How to Create an Address Book.
- **Select Address Books** – Select one or more Address Books to include in the campaign. Click the magnifying glass to view the number of entries of an Address Book and to edit it.
- **Create New Address Books** – Click to create a new Address Book. For details, refer to How to Create an Address Book.
- **Show Advanced Filters** – Click to display optional hidden filters.
  Advanced Filters are used to determine which addresses in an Address Book to use as targets for the campaign. These same fields are also present in Address Books. Entering information in these fields in the campaign filters Address Book entries based on these criteria. So you can decide to send only to employees of a certain company, at a certain site, and at a certain organization level – like sending email only to Barracuda Networks employees at the Campbell, California office who are at the Director level.
  Note that Advanced Filter fields do not support Boolean search terms.
  - **Start/End Hire Date** – Date range for hire date of recipients. Used, for example, to train new hires or to refresh users of a certain level of seniority.
  - **Organization Area** – Part of the organization, like department or division, corresponding to the email address entry.
  - **Organization Level** – 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.
  - **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**.
  - **Site/Location** – Descriptor for the location of the email address, like **Manufacturing** or **Downtown Branch**.
  - **State** – Geographic state 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.
  - **Program Term Group** – Automatically displays user level for contact selection.

- Employment Type – Descriptions of employment, like **Exempt**, **Non-Exempt**, **Seasonal**, **Temporary**, and so on.
      - **Cost Center** – Unit within the organization where costs related to the email address entry are charged.
      - **Custom Fields** – Enter any information you know to be in one of the custom fields in an Address Book.
  - **Enforce Template Uniqueness** – Select this checkbox to ensure that these email addresses have never received the email template you are about to specify.
  - **Content Group Match Column** – Select the address column you want to use to match addresses with the column value.

Specify the Content

Select one or more Content Groups to use in this campaign.

Refer to [Content Groups](#) for more information.

Continue with **Specify Approval Comments** below.

1. In the **Content** section, click **Add New Email Template**. In the dialog box, click **Yes** to save the current campaign and add the email template. The Content Center displays available email templates.
2. Review the available templates and click the one you want to use in your campaign. You can optionally click **Create Email Template** to create a new template.
   > Security Awareness Training includes a vast collection of templates. Use the filter in the left navigation pane to locate templates for specific categories, like Training Announcements or Ransomware.
   > To use the filter, select your criteria, then click **Apply**. The matching templates display in the Content Center page.
3. Select the appropriate action. Available actions depend on whether the content has already been imported into your instance of Security Awareness Training.
   - If the content is *already imported* into your instance of Security Awareness Training, the following actions are available:
     - **Copy and Add to My Recent Campaign** – Duplicates the template and associates it with the most recently accessed campaign. Following the steps in this article, that is the campaign you just created.
     - **Copy and Edit** – Duplicates the template and opens the editor so you can customize the template. Note that this option does not associate the template with your campaign.
     - **Add to My Recent Campaign** – Associates the template with the most recently accessed campaign. Following the steps in this article, that is the campaign you just created.
     - **Edit** – Opens the editor so you can customize the template. Note that this option does not associate the template with your campaign.

- If the content is *not already imported* into your instance of Security Awareness Training, the following actions are available:
  - **Import and Add to My Recent Campaign** – Adds the content to your instance and associates it with most recently accessed campaign. Following the steps in this article, that is the campaign you just created.
  - **Import and Edit** – Adds the content to your instance and opens the editor so you can customize the template.

4. To specify additional templates, click **Return to Content Center**. Repeat Step 3 to add more templates. If you add multiple templates, Security Awareness Training will randomly assign a template to each email address selected when you generate the campaign.
To continue creating your campaign, click **Go to My Recent Campaign.** If needed, you can also click **Back to Recent Campaign** in the upper-right corner of the **Content Center** page.

5. Back in the **Content** section of your campaign, click **Add New Landing Page**. In the dialog box, click **Yes** to save the current campaign and add the landing page. The Content Center displays available landing pages.

6. Follow the instructions in Steps 2-4 above, this time for landing pages. Select a template, then select the appropriate action.

7. Back in the **Content** section of your campaign, click **Add New Email Account for Sending**.
   - To optionally specify additional sending email addresses, click **Save** now. Add another address and repeat for each additional address. Then, continue the rest of the process below. If you add multiple email addresses here, Security Awareness Training will randomly assign a sender email address to each contact email address selected when you generate the campaign.

8. Select an **Email Account Name** from the list that will be the sender of your outbound campaign emails.

9. Select an **Email Server Domain** from the list that will be the domain of the sender of your outbound campaign emails.

10. Click **Add New Web Server for Landing Pages**.
    - To optionally specify additional web servers, click **Save** now. Add another web server and repeat for each additional server. Then, continue the rest of the process below. If you add multiple web servers here, Security Awareness Training will randomly assign a web server to each contact email address selected when you generate the campaign.

      Specify the following information:
    - **Protocol** – Select the HTTP or HTTPS protocol.
    - **Subdomain** – Optional. Specify a subdomain associated with the landing page.
    - **Web Server Host Domain** – Select the web server that hosts the landing page.
    - **Short URL** – Select the **Short URL** box if the web server uses shortened URLs.

Specify Approval Comments

If the **Approval Required** box is selected, this campaign must be approved before you can Go Live with the campaign. If you choose, you can enter comments to the reviewer in the **Approval Comments** box.

The **Approval Required** setting is configured in **Global Settings > Approvals > Campaign Approvals Required** . If approvals are required, you cannot move the campaign forward from **Approve** to **Go Live** mode without the proper approval. This setting does not affect your ability to move the campaign between **Design**, **Generate**, and **Approve** modes.

Specify Advanced Settings

All of these settings are optional.

- Select the **Hide Campaign Results** box to hide the results from view. The results will still be collected. You might choose to use this setting when a campaign is past its cutoff date, so only current campaigns display in the results.
- Select the **Exclude from Program Statistics** box to exclude all activity from this campaign from Program Statistics.
- Select an image to associate with this campaign. Click **Browse** to select the image.

Save the Campaign

When you have completed all of the required actions above, click **Save** to save the campaign. The page refreshes.

Generate the Campaign

Under **General Settings**, in the **Stage** area, click **Generate** . Click **Yes** when prompted. The campaign generates.
The generation process can take several minutes. You can move away from the screen or even log out without interrupting the generation process.

Proceed to [Approving an Email Campaign and Going Live](#).

Figures

1. profileIcon.png
2. 2.generate.png