

Creating and Generating a Portable Media Campaign

<https://campus.barracuda.com/doc/78152144/>

When you create a portable media campaign, you will create information to be placed on a portable media device, including specifying landing pages, web servers, and attachments. You will be able to find out what happens to each of the devices – whether they are responsibly turned into an administrator, or if someone clicks on an attachment and visits your landing pages.

Create the Basic Campaign

1. Navigate to **Campaigns > Campaign Manager**.
 2. Click **New**.
 3. For the **Campaign Type**, select **Portable Media Campaign**. The **Campaign Type** for a specific campaign cannot be changed later.
 4. Enter the following information. These values can be changed at any time.
 - **Campaign Name** – Enter a descriptive name for the campaign.
 - **Description** – Optional. Enter text to describe the campaign.
 - **Plan** – Optional. Select a plan associated with this campaign. Create and review plans under **Plan > Plan Manager**.
 - **Campaign Intent** – Select a reason why you are conducting this 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.

 - **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](#)
- **Category** – Optional. Enter a category, like **Spear Phishing Simulation** or **Training**

Reminder, to associate with this campaign for tracking purposes.

5. Click **Save**. The page refreshes. At the top of the page, you can edit the information you entered in Step 4.
6. **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:

- **Media Reporting Date** – Select the earliest date and time that data will be collected during the Go Live stage.
- **Cutoff Date** – Select a date and time when results will no longer be collected for reporting.

Specify Targets

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

- **Media Count** – For reporting purposes, specify the number of copies of physical media that will be distributed.

Specify the Content

1. In the **Content** section, 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.
2. Review the available Landing Pages and click the one you want to use in your campaign. You can optionally click **Create Landing Page Template** to create a new template.
 - If the content is *already imported* into your instance of <https://campus.barracuda.com/product/WAAS/doc/96019909/understanding-the-global-infrastructure>, 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.

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.
4. 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 Web Server for Landing Page**.
6. Select the **Web Server** associated with the landing page for this campaign, along with the **Protocol** you want to use and a **Subdomain**, if needed.
7. Click **Smart Attachments** to view attachments you have already added to this campaign. You can also add a new attachment here.
 - Click **New**. The **Smart Attachment Manager** displays. Select the **Smart Model** on which to base your attachment, then click **Save** to specify additional settings. Settings vary depending on the model file you select.
 - **Custom File Name** – Enter a name for your model attachment. Include the file extension and make sure it matches the model file type.
 - **Custom Text** – Enter text to display when the user opens the attachment.
 - **Custom Image** – Click **Browse** to select an image to display when the user opens the attachment. For more information, refer to [Image Gallery](#).
 - **File Type** – The type of file (Excel, PowerPoint, etc.) on which your model file is based.
 - **Digitally Signed** – Indicates whether the model file is digitally signed, making it appear to the user to be more trustworthy
 - **Model File** – Displays the title and file type you specified above.
 - **Model Mime Type** – Displays the Mime type for the file you specified.
 - **Model File Size** – Displays the size, in KBs, of the model file you specified.
 - **Last Updated** – Displays the timestamp for the last time you updated the file.
- Click **Save**, then click **Return to the Campaign Manager**.

Available Attachments

The following are types of Smart Attachments that are available for you to add to your campaign. Adding a model attachment can make your campaign appear to be more authentic to the user. Note that these are not actual attachments.

- **Executable** – Recommended for use in portable media campaigns, where a file named `setup.exe` or `install.exe` is expected to be delivered on a thumb drive or CD. Most email filters will remove executable attachments by default.
- **HTML - w/Load Content Button** – Displays a web page with instructions that the user

must click a button to view the content.

- **HTML - w/Meta Tags for Immediate Redirect** - Redirects users to a page where they can learn more about attacks.
- **PDF - Full Page - Clickable** - Displays a PDF file with instructions that the user must click a button to view the content.
- **PDF - Secure Full Page - Clickable** - Displays a PDF file with instructions that the user must click a link to view secure content.
- **PowerPoint - Replaceable Text and Image** - Displays a PowerPoint document that you can customize for your users.
- **Word - IP and User Name** - Displays a Word document that you can customize for your users. This attachment captures the local IP address of the user interacting with the file. In addition, if the user interacting with the file is on a Windows computer, this attachment also captures their user name.
- **Word - without Macro** - Displays a Word document you can customize for your users.
- **Word - Admin Only** - Displays a Word document you can customize for your users. If the user interacting with the file is on a Windows computer, this attachment also captures details about whether the user has local admin privileges on the machine they are using.
- **Word - IP Only** - Displays a Word document that you can customize for your users. This attachment captures the local IP address of the user interacting with the file.
- **Word - IP User Name and Admin** - Displays a Word document you can customize for your users. This attachment captures the local IP address of the user interacting with the file. In addition, if the user interacting with the file is on a Windows computer, this attachment also captures their user name and details about their local admin privileges on the machine they are using.
- **Word - Replaceable Text and Image** - Displays a Word document you can customize for your users.
- **Word - w/Load Content Button** - Displays a Word document with instructions that the user must click a button to view the content.
- **XSL - Budget** - Displays an Excel spreadsheet designed to look like a budget.
- **XLS - w/Load Content Button** - Displays an Excel spreadsheet with instructions that the user must click a button to view the content.
- **XSL - Wire Transfer** - Displays an Excel spreadsheet with links the user can click to approve or deny a wire transfer.
- **XSL - without Macro - Replaceable Text and Image** - Displays an Excel document you can customize for your users.

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

1. 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.
2. Optional. 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.

Note that you must put the campaign materials onto your portable media device. Be sure to read the instructions in the Approval part of the campaign, as described in the next article.

Proceed to [Approving a Portable Media Campaign and Going Live](#).

Figures

1. 2.generate.png

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