Getting Started: Workflow Basics

https://campus.barracuda.com/doc/78808973/
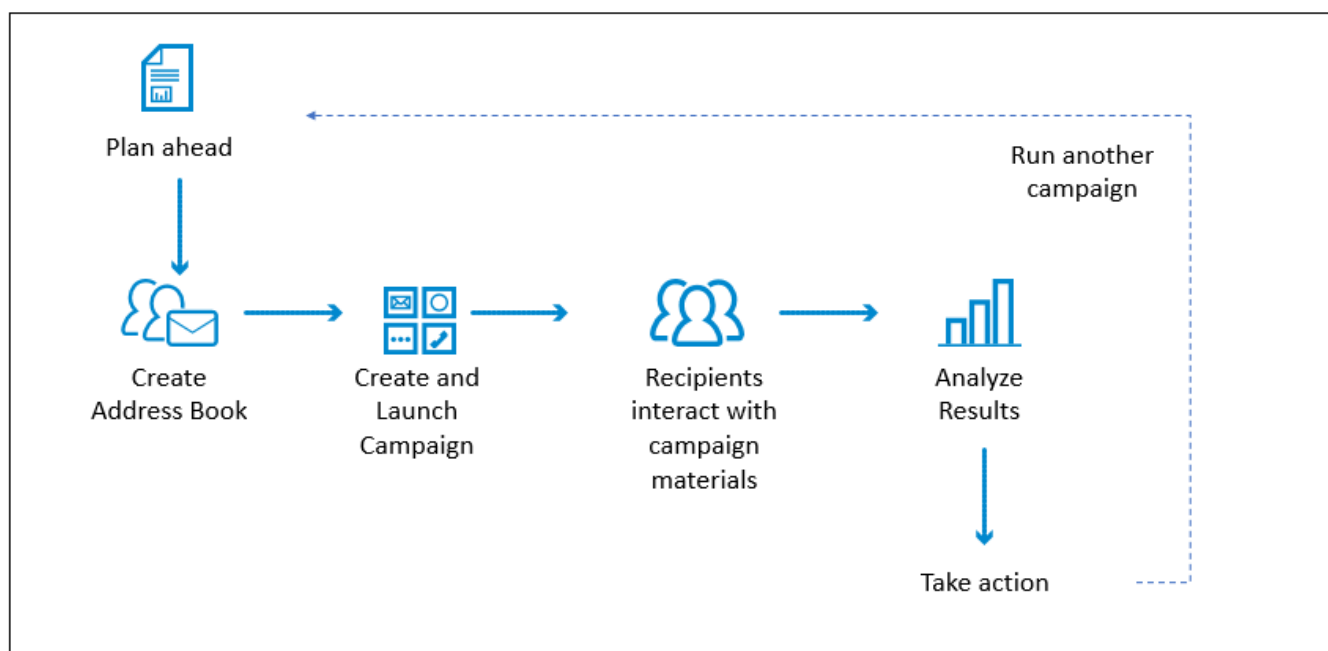
The following diagram depicts the overall process of using Security Awareness Training to help your users learn to keep your organization safe.

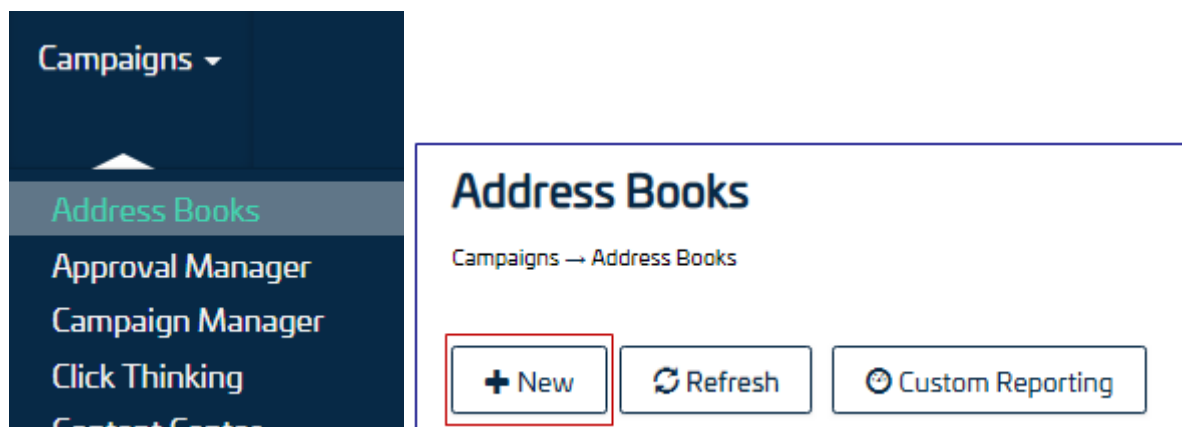Click each phase of the process to learn more.

At the start of the process, consider what your objectives are.

- What types of campaigns do you want to run?
- What have been problems in the past?
- Consider your time frame and targets.

Determine which users will be targeted by each campaign.

To set up an Address Book

1. Navigate to **Campaigns** > **Address Books**, then click **New**.

2. Enter a **Name** and optional **Description** for the Address Book. In the **Upload an Import File** section, select an address book file from your local machine. Click **Save**.

3. On the new page, scroll to the **General Settings** section. Ensure that the **Active** check box is selected.

4. Scroll to the **Import Processing** section. Use the pull-down menus to map the columns (fields) in the Security Awareness Training address book to the corresponding columns in your data file.
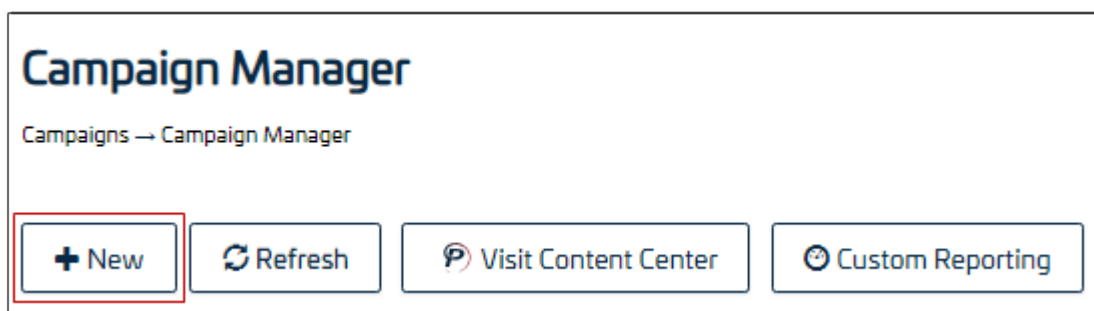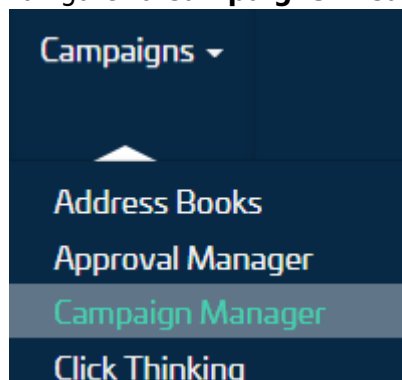

5. For **Import Action Request**, select **Perform an import when I hit the Save Button**.
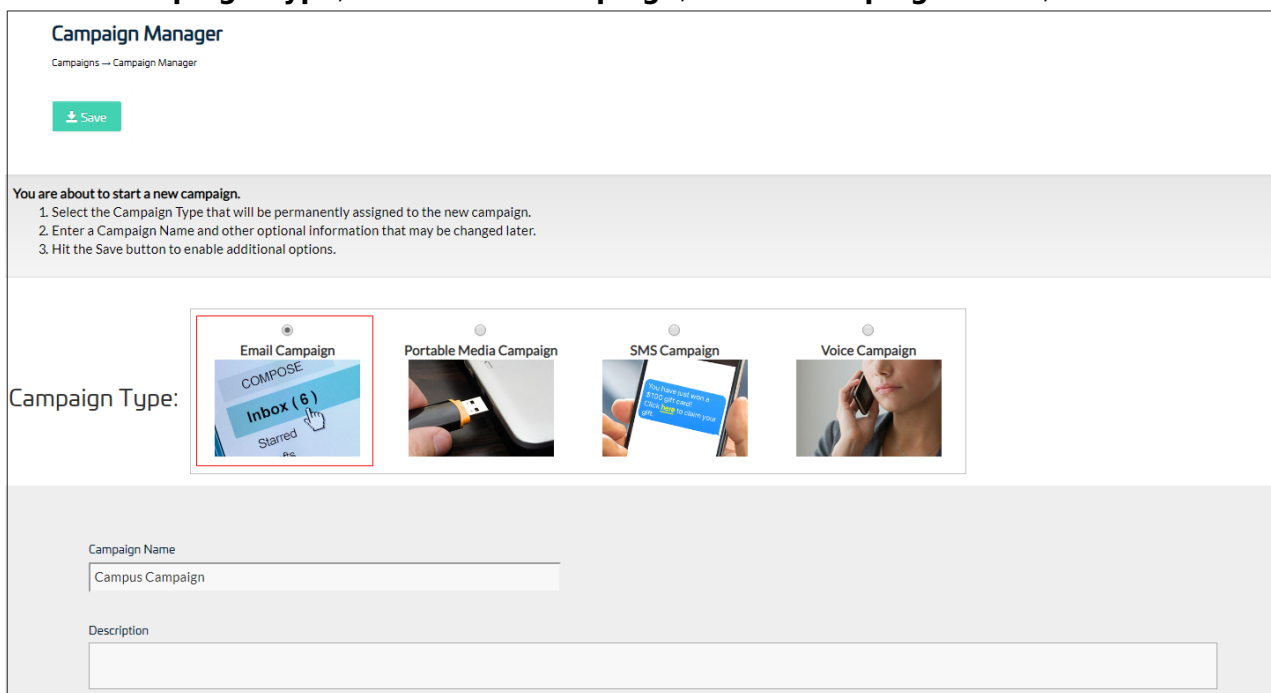
6. Click **Save**.

For more information, refer to Address Books.

To design a Campaign

1. Navigate to **Campaigns** > **Campaign Manager**, then click **New**.

2. For the **Campaign Type**, select **Email Campaign**, enter a **Campaign Name**, then click **Save**.

3. On the new page, scroll down to the **Scheduling** section. Specify the **Start Date**, **End Date** and **Cutoff Date**.

4. In the **Targets** section, select the address book you previously uploaded and specify the number of emails to send.

5. In the **Content** section, select at least one **Email Template**, **Landing Page**, **Email Address for Sender** and **Web Server**.
Note: When asked if you want to save the current campaign, then select the content, select **Yes**.

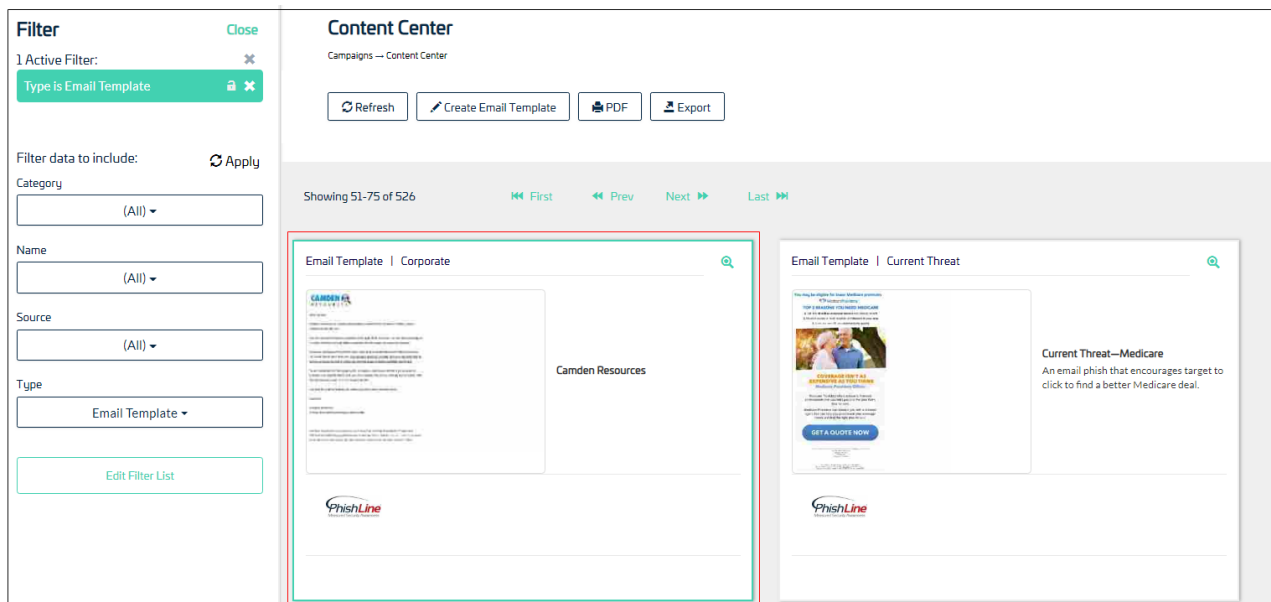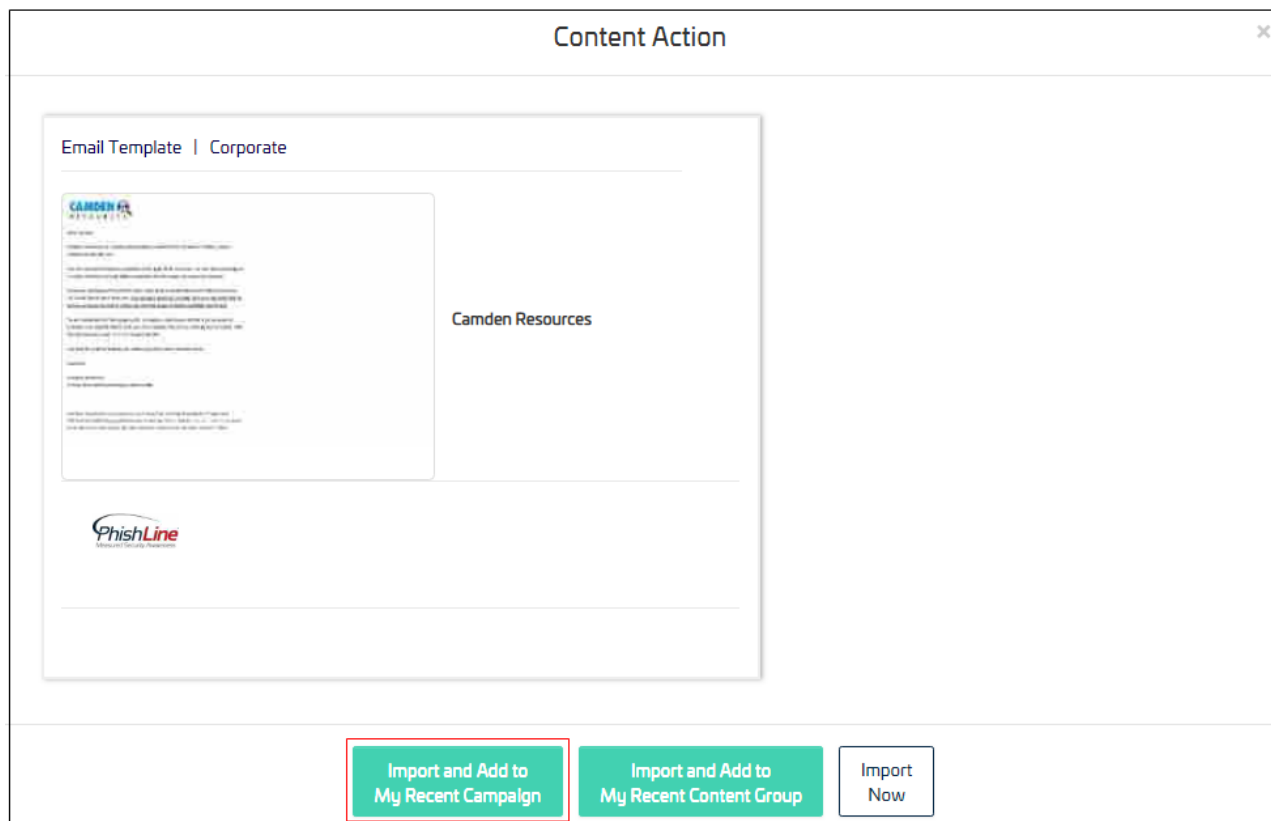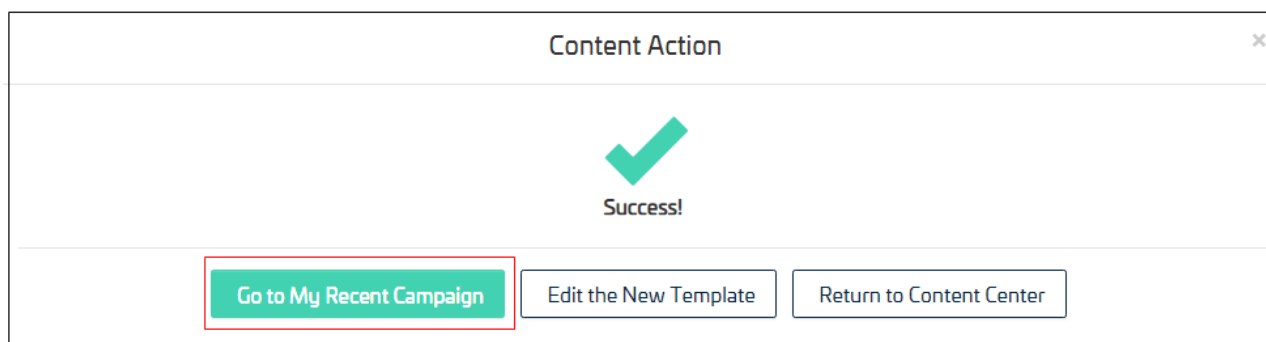For an Email Template: Click **Add New Email Template**. In the Content Center, click the template you want to use.

When prompted for action, select **Import and Add to My Recent Campaign**.

Click **Go to My Recent Campaign**.

Repeat these steps for **Landing Page**, **Email Address for Sender** and **Web Server**.

6. Click **Save**.

For more information, refer to Campaigns.

During the campaign period, users will interact with the campaign materials you sent them – via email, phone, text, etc.

You can start to analyze data at this point if you want a look into the results.

For the most accurate results, analyze the data after the campaign cut-off date is reached. Use the various tools available under the Results menu to help you analyze the results.

For details, refer to Results.

Use the results you receive to plan further action. Focus additional training in certain areas. Run additional campaigns.

Figures

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