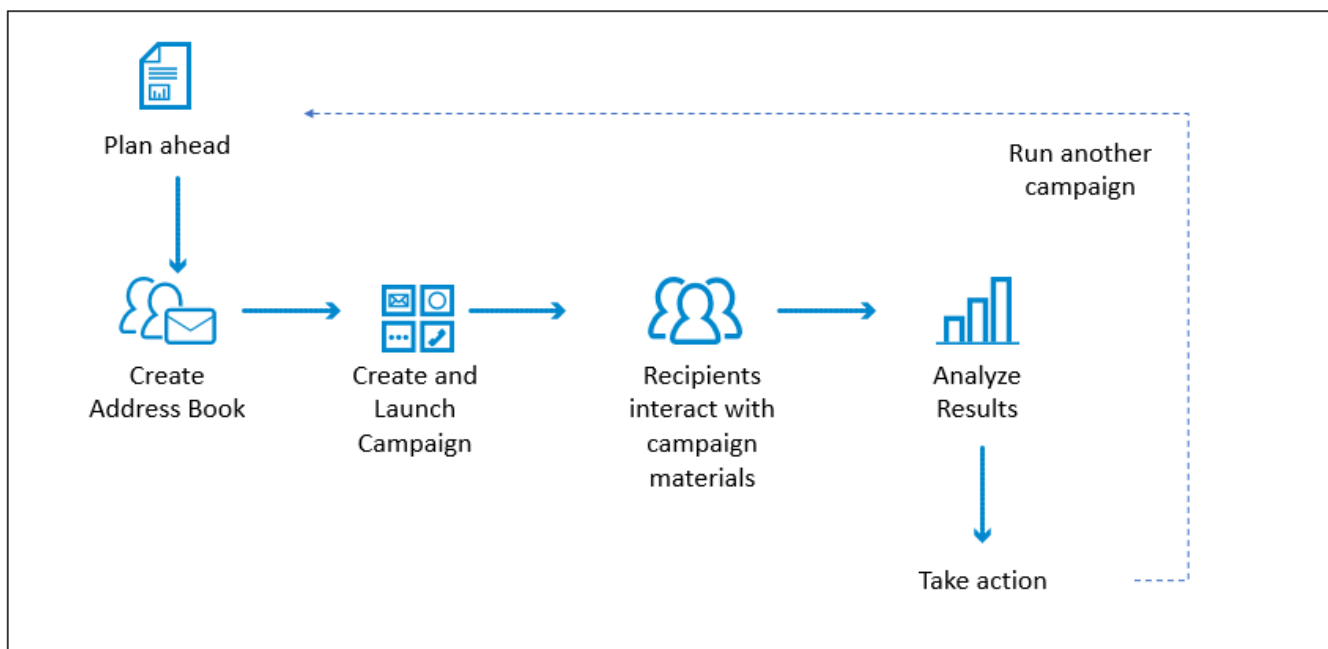


Getting Started: Workflow Basics

<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.

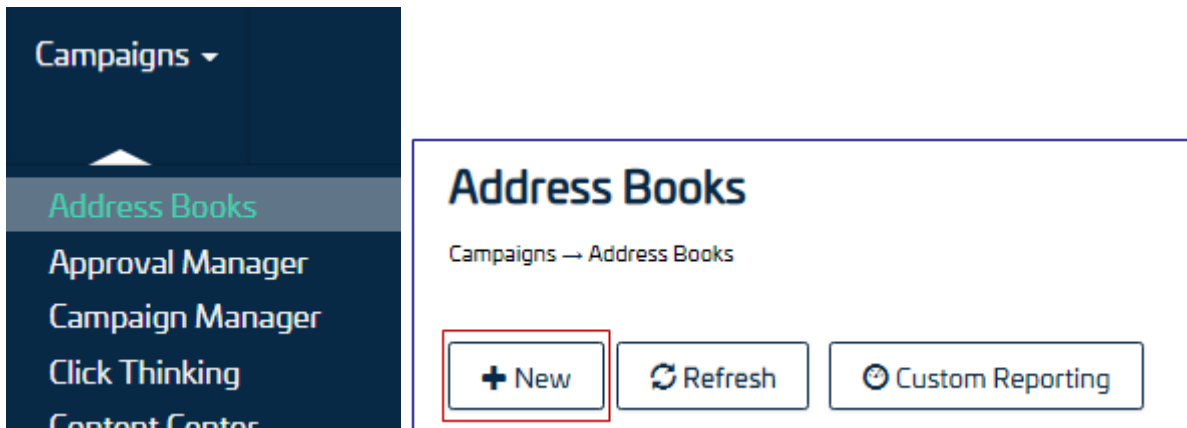
At the start of the process, consider what your objectives are.

- 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.

GENERAL SETTINGS

Address Book Name

Description

Active

Email Addresses

Active Address Count
 0

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.

IMPORT PROCESSING

Import Action Request

Upload an Import File:
 AddressesWWConf.csv

Email Address

First Name

Last Name

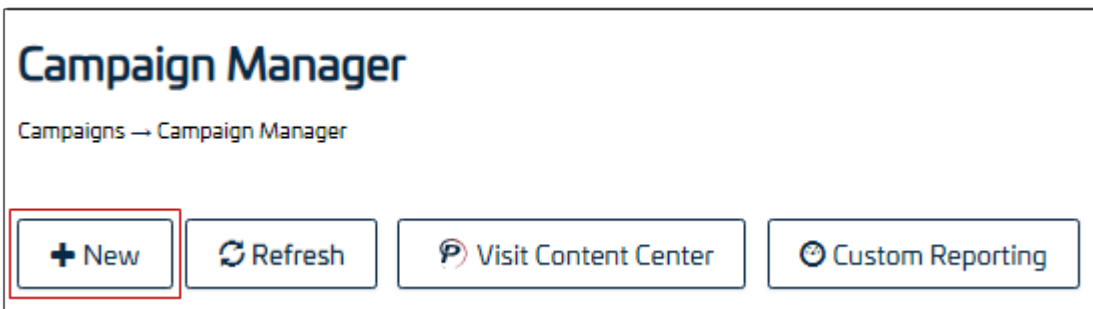
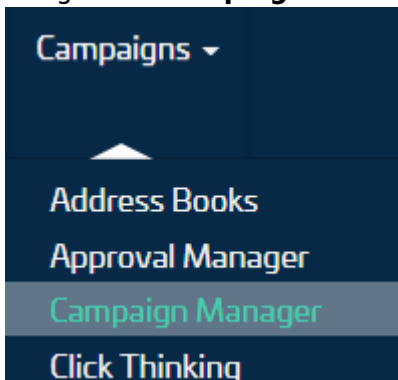
The column # in the upload file that will be assigned to this address element.

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

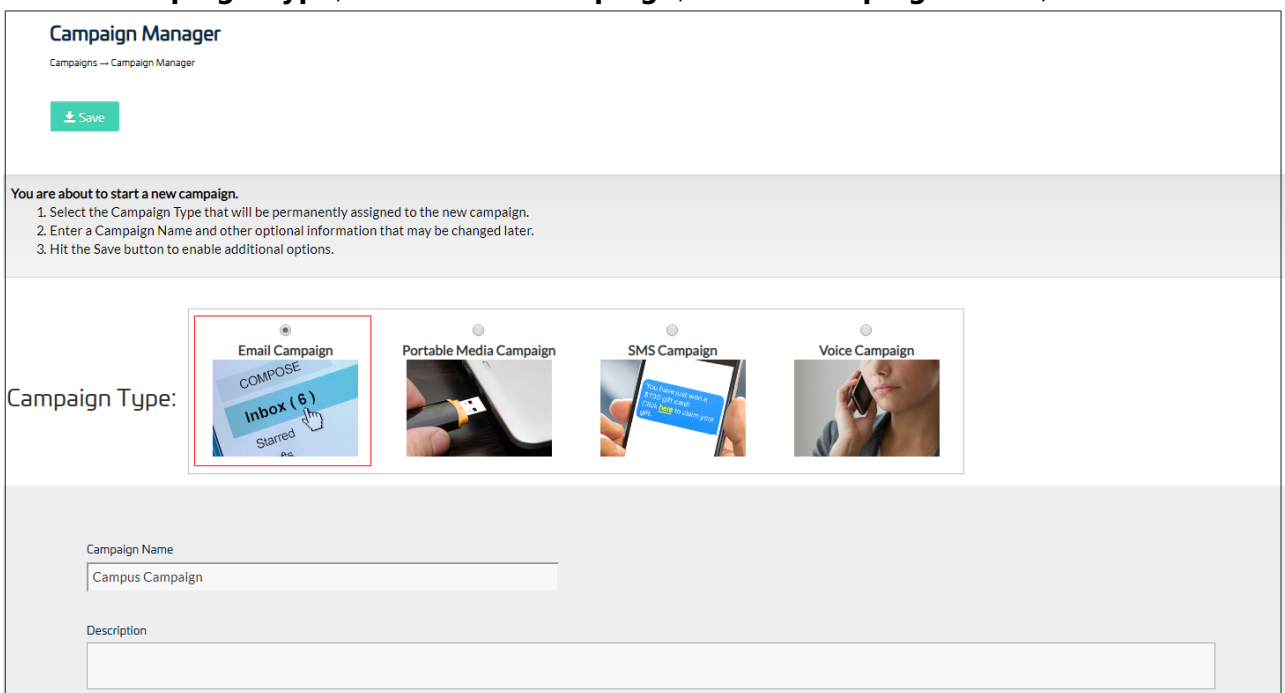
For more information, refer to [Address Books](#).

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**.

SCHEDULING

Schedule Based Upon

Start Date <input type="text" value="2019-01-07 09:00"/>	End Date <input type="text" value="2019-01-18 12:00"/>	Cutoff Date <input type="text" value="2019-02-01 12:00"/>
---	---	--

Sunday
 Monday
 Saturday
 Tuesday
 Wednesday
 Thursday
 Friday

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

TARGETS

Emails to Send

The max # of emails to be scheduled for delivery attempts. The actual # sent will not exceed the # of Matching Entries.

Select Address Books

Address Books:
 CampusAddresses
You may select more than one address book.

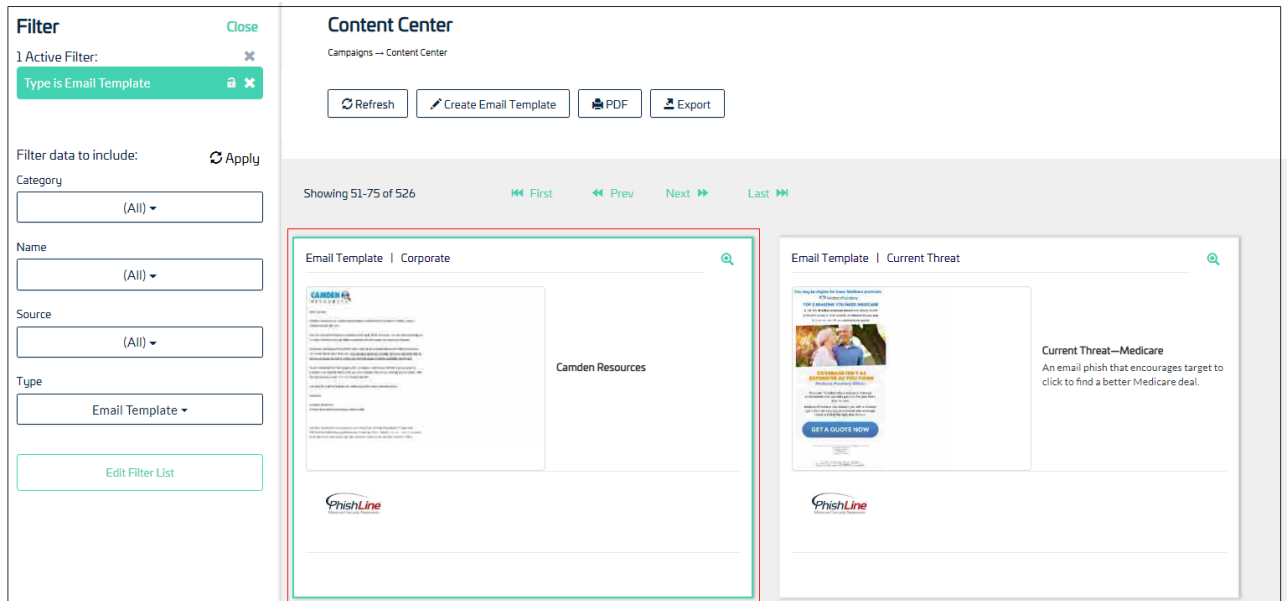
Enforce Template Uniqueness

5. In the **Content** section, select at least one **Email Template, Landing Page, Email Address for Sender** and **Web Server**.

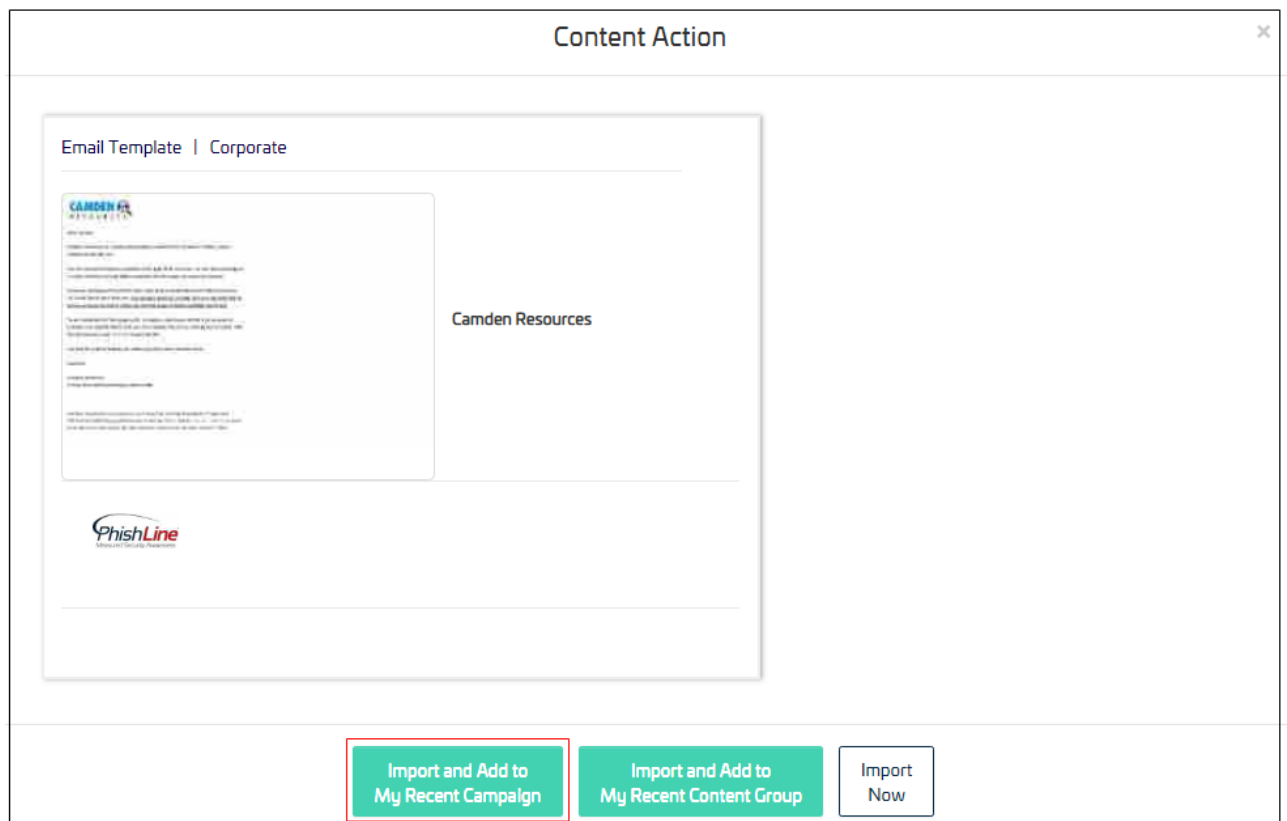
Note: When asked if you want to save the current campaign, then select the content, select **Yes**.

CONTENT

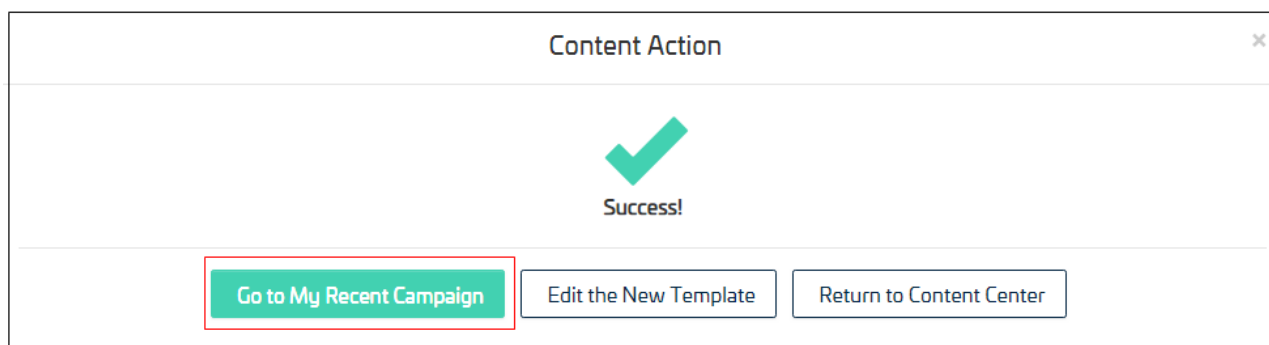
For an Email Template: Click **Add New Email Template**. In the Content Center, click the template you want to use.



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

1. flowchart.pptx.png
2. AddressMenu.png
3. AddressNew.png
4. AddressSettings.png
5. AddressImport.png
6. campaignMenu.png
7. campaignNew.png
8. campaignEmail.png
9. campaignScheduling.png
10. campaignTarget.png
11. campaignContent.png
12. CampaignContentCenter.png
13. campaignContentAction.png
14. contentSuccess.png

© Barracuda Networks Inc., 2022 The information contained within this document is confidential and proprietary to Barracuda Networks Inc. No portion of this document may be copied, distributed, publicized or used for other than internal documentary purposes without the written consent of an official representative of Barracuda Networks Inc. All specifications are subject to change without notice. Barracuda Networks Inc. assumes no responsibility for any inaccuracies in this document. Barracuda Networks Inc. reserves the right to change, modify, transfer, or otherwise revise this publication without notice.