Creating a Risk Analysis Survey

https://campus.barracuda.com/doc/86541064/

Barracuda PhishLine includes a standard risk analysis survey, described in Risk Analysis. You can also create a custom survey to evaluate the riskiness of your users' responses.

Surveys include the following components:

- **Sections** are containers for your questions and help you to structure your survey. You can have one or more Sections in your survey. Sections can be used in multiple surveys.
- **Questions** are the prompts for the users to answer. The first question is often an introduction, not requiring a response from the survey taker. Similarly, the last question is often a wrap-up not requiring a response.
- **Answers** are the response choices available to the survey taker.

Creating a Survey

To create a survey:

Step 1: Create a Section

1. Navigate to **Education > Sections**.
2. In the Section Manager, click **New** to create a new Section.
3. Provide the following information for the new Section:
    - **Section Name** – Enter a unique name. Remember this name might be used in more than one survey.
    - **Section Name English** – Optional. If you need to translate the original Section Name.
    - **Section Sequence** – Optional. Specify a number for this section to be placed in a sequence in a survey. Lower numbers appear early. If left blank, the system will sort based on Section Name.
    - **Section Color Code** – Optional. HTML code for color of this section in the results.
    - **Section Required** – Select this option to ensure survey takers respond to questions within this section.
4. Click **Save**.

Step 2: Create Opening Question

Opening (and closing) questions are designed to provide information and do not request a response.

1. Navigate to **Education > Questions**.
2. In the Question Manager, click **New** to create a new Question.
3. Provide the following information for the new Question, ignoring the other fields:
    - **Question Identifier** – A unique identifier for this question.
    - **Question Sequence #** – Optional. For an opening question, enter **1**.
4. Click **Save**.

5. Scroll down to **Reference Materials**. Enter your introductory text in the **Question Reference Material** field.
6. Scroll down to **Sections**. Select the Section you created earlier.
7. Click **Save**.

Step 3: Create Survey Questions and Answers

These Questions and Answers are the main body of the survey.

1. Navigate to **Education > Questions**.
2. In the Question Manager, click **New** to create a new Question.
3. Provide the following information for the new Question:
    - **Question Identifier** – A unique identifier for this question.
    - **Element Name** – [Ignore this field.]
    - **Question Sequence #** – Specify a number for this Question to be placed in sequence within the section. Lower numbers appear earlier. Increment the number each time you create a new Question.
    - **Question Category** – Optional. Specify what type of Question this is.
    - **Question Status** – [Ignore this field.]
    - **Question Type** – [Ignore this field.]
    - **Question Prompt** – The actual Question users will see in the survey.
    - **Question Narrative** – Optional. Add notes of background about the question. This information will not be seen by respondents.
4. Click **Save**. The page refreshes.
5. Scroll down to **Sections**. Select the Section you created earlier.
6. Click **Save** again.
7. Scroll down to **Answers**. Select a Template. Some templates, like Custom, enable you to create custom content. Others, like True/False, have preset values.
8. Click **Save**. The page refreshes.
9. Scroll down to **Answers** and click **Insert**.
10. Provide the following information for the new Answer:
    - **Answer Sequence #** – Specify a number for this Answer to be placed in sequence within the Question. Lower numbers appear earlier. Increment the number each time you create a new Answer.
    - **Answer** – The actual Answer users will see in the survey.
    - **Answer is Default** – [Ignore this field.]
    - **Answer is Correct** – [Ignore this field.]

      The **Answer Impact Score** and **Answer Likelihood Score** are scored with respect to a scale of your choosing. You can create your own scale or use a standard scale, like 1-5, where 1 is the least severe/likely and 5 is the most severe/likely. Whichever scale you choose, be consistent with your scale and your scoring.
    - **Answer Impact Score** – Optional. Determine a score for how severely your organization would be affected if a user chose or took the action described in this Answer.
    - **Answer Likelihood Score** – Optional. Determine a score for the probability that a user would choose or take the action described in this Answer.

    - **Answer Reference Material** – Optional. Add notes or references about the Answer.
11. Click **Save**.
12. Scroll down to **Sections**. Select the Section you created earlier.
13. Click **Save** again.
14. Repeat steps 7-13 for each Answer in the current Question. Increment the **Answer Sequence #** for each Answer. After you create the last Answer, continue with Step 11 below.
15. In the top right corner of the page, click **Return to the Question Manager**.
16. Repeat steps 2-15 for as many Questions as you want in your survey. Increment the **Sequence #** for each question.
17. Click **Save**.

Step 4: Create the Closing Question

Like the opening Question, the closing Question provides information and does not ask for a response. Follow the process described in Step 2: Create Opening Question. For the Sequence #, enter a number greater than the number of the last Question you just created.

After you create the closing Question, continue with Step 5: Create the Training Template.

Step 5: Create the Training Template

1. Navigate to **Education > Training Content**.
2. Click **Create Training Template**.
3. Provide the following information for the Training Template:
    1. **Training Template Type** – Select **Standard**.
    2. **Training Template Name** – A unique name for the Training Template.
    3. **Description** – Optional. A description of this Training Template.
4. Click **Save**. The page refreshes.
5. Scroll down past the **Description**.
6. Mark the Template as **Active**.
7. Optionally provide a **Start Date** and/or **End Date**, if you want the survey to be available during certain dates. Note that if you select a Start Date in the future, you will not be able to preview your Survey.
8. Scroll down and click **Select Sections** and select one or more Sections to include in the Template.
9. Click **Save**. The page refreshes.
10. Scroll down the page to the web address. Copy the URL – this is the link to the training you just created.

Step 6: Distribute the Survey

1. Be sure you have the URL you copied in the previous step.
2. Choose a method to contact your users, for example through email, and provide this link to the survey.

Editing the Survey

DO NOT edit the Survey after you have made it available to survey takers. This would change the survey and invalidate your results.

Before you release your survey, you might need to update a Question or fix a typo.

1. Navigate to **Education > Training Content**. Across the top of the screen, there are buttons for Sections and Questions. Click the button corresponding to the component you want to edit. Edit Answers within their parent Question.
2. In the table that appears, locate the component you want to edit and click its associated pencil Edit icon .
3. After you make your changes, click **Save**.

Survey Results

To view your survey results, navigate to **Education > Risk Analysis**. In the left navigation panel, in the **Active Filter** field, click the green box and select the survey you created. View the results as described in Risk Analysis.

Figures

1. editButton.png

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