

Creating and Running an Automated Campaign

<https://campus.barracuda.com/doc/88539907/>

You must [create a Dynamic Address Book](#) before you can create your Automated Campaign. You specify which type of Automated Campaign you are running when you create the Dynamic Address Book.

Sections that are not mentioned in these steps are not used for Automated Campaigns. Scroll down on the Campaign page until you get to the section described in the next step of the instructions.

To create an Automated Campaign:

Create the Basic Campaign

1. Navigate to **Campaigns > Campaign Manager**.
2. Click **New**.
3. For the **Campaign Type**, select either **Email** or **Training**.
4. In the **Campaign Intent** field, select the appropriate intent. The available selections are based on your choice of **Campaign Type** above.

Email Campaign: Campaign Intent for Automated Campaigns (other values not shown here)

- 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 – Enables the campaign Administrator to send a follow-up email to a manager, letting them know which of their employees clicked a link in a campaign or still needs to complete their training. Emails are sent to each manager separately and concern users who report to that manager.

Training Campaign: Campaign Intent for Automated Campaigns (other values not shown here)

- Automated Education Campaign – A training campaign that is automatically sent to 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.
5. Enter the following information.
 - **Campaign Name** – Enter a descriptive name for the campaign. Note it is helpful to use the word Automated in the name for an Automated 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. Notice the **Automated Campaign** banner at the top of the page.
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.

Set the Schedule

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

- **Schedule Based Upon** – Select **Administrator's Time Zone**.
- **Start Date** – Select a future date and time on which to start the campaign.
- **End Date** – Select a future date and time on which to end the campaign, for example 30 minutes after the Start Date. Automated Campaigns go through cycles and will restart each time there is a new email added to the Dynamic Address Book. The end date can be up to one year after the Start Date.
- **Cutoff Date** – Select a date and time far in the future when results will no longer be collected for reporting. Select a date like January 1, 2030, to ensure that this Automated Campaign will keep running until you decide to stop it.

Note that you cannot change the days or hours that this automated campaign will be sent.

Specify Targets

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

- **Emails to Send** – For Automated Campaigns, enter 9,999,999.
- **Select Address Books** – Select only *one dynamic* address book to include in the campaign. Only dynamic address books are displayed in the list of available address books. The dynamic address book you choose must contain at least one email.

Note – For Immediate Feedback Automated Campaign types, there must be at least one address in the Dynamic Address Book you associated with this Automated Campaign. The easiest way to achieve this is to send yourself a Sample Email from the Campaign you will be watching and to perform the watched behavior – like clicking a link – to add an address in the Dynamic Address Book.

The following selections are optional.

- Click **Create New Address Books** to create a new dynamic address book. You are taken to the Address Books page. Be sure to save your work before leaving this page. Follow the instructions in [How to Create a Dynamic Address Book](#) .
To return to this page, navigate to **Campaigns > Campaign Manager**. Locate this campaign in the list and click the pencil button to edit the campaign.
- Click **Show Advanced Filters** to specify criteria to limit this campaign, for example, sending only to individuals in a certain country or with a certain hire date.
- Select the **Enforce Template Uniqueness** box to ensure that selected email templates were never used before with any of the target email addresses.

Specify the Content

This procedure is the same as specifying content for any other Email Campaign. The content you specify here is the content that is sent either to users who performed a certain behavior or to managers regarding their employees.

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.
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. The following step depends on the type of automated campaign you are creating:
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.
Click **Add New Email Account for Sending**
 - Specify an **Email Account Name** and **Email Server Domain** to create the sender address for your campaign emails.

Specify Training Reminders - For Training Campaigns - Optional

To enable training reminders:

1. Select the **Reminders On** checkbox. This option must be selected for training reminders to be sent.
2. Specify the following settings:
 - **Reminder Frequency** – Select how often you want the email reminders to be sent, after each user receives their initial training campaign email. Reminders will be sent to users

either until they complete the training or until the campaign cut-off date.

- **Reminder Send Hour** - Select the approximate time of day you want to send reminder emails. Emails are only sent on the days you specify in the **Schedule** section above.

You can change the scheduling information until the campaign cut-off date.

3. Optionally, select or create an email template to send as the training reminder.

You can select only one template for the training reminder. If you select multiple templates, the system will use the last one you select.

You can change the training reminder template before the campaign goes live.

1. Click **Add New Training Reminder 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 to find the one you want to use as a training reminder. You can optionally click **Create Email Template** at the top of the page to create a new template.
3. Click the magnifying glass for the template you select.
4. Select the appropriate action. Available actions depend on whether the content has already been imported into your instance of Security Awareness Training.

Note: You must edit the email template to include the training content. Editing the template is described in the **Customize the Email Template** section above. Consider copying/importing the template now, then customizing it when you get to the next section.

- If the content is *already imported* into your instance of Security Awareness Training, the following actions are available.
 - **Copy and Add as Training Reminder Template** - Duplicates the template and associates it with the current campaign. Click **Go to My Recent Campaign** to return to the campaign. Alternatively, click **Edit New Email Template** to edit the template immediately, or click **Close** to remain in the Content Center.
 - **Add as Training Reminder Template** - Associates this template with the current campaign. Click **Go to My Recent Campaign** to return to the campaign. Alternatively, click **Edit New Email Template** to edit the template immediately, or click **Close** to remain in the Content Center.
 - **Edit Now** - Opens the editor so you can customize the template. Note that this option does not associate the template with your campaign. After you edit the template, click **Save**, then click **Back to Recent 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 Now** - Adds the content to your instance. Click **Edit New Email Template** to edit the template immediately. Alternately, return to the recent campaign without editing or return to the Content Center.

Specify Approval Comments - Optional

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 - Optional

1. 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. Select the Exclude from Program Statistics box to exclude all activity from this campaign from Program Statistics.
3. 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.

Approve the Campaign

If you specified in the campaign that approval is required, you, or someone else in your organization, must approve the campaign.

Review all of the information in the campaign. If it is satisfactory, go to the **Approval** section, enter any **Approval Comments**, and change the **Approval Status** to **Approved**. If it needs work, enter any comments and change the **Approval Status** to **Rejected**.

For full details on approving a campaign, refer to [Approving a Training Campaign, Going Live, and Sending Reminders](#).

Trigger the Automated Campaign

These steps are specific for the type of Automated Campaign you are creating. Refer to the appropriate section below. For a reminder of which type of campaign you are running, refer to [Understanding Automated Campaigns](#)

Immediate Feedback Automated Campaign

The Dynamic Address Book takes about an hour to populate. You can then return to the Campaign Manager to Generate the Campaign and Go Live.

To Generate the Campaign:

Under **General Settings**, in the **Stage** area, click **Generate** . When prompted, click **Yes**. 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.

On-Demand Automated Campaign

First, generate the Campaign. On-Demand Automated Campaigns must be in the **Go Live** stage before you can send notifications.

In the Go Live stage, you can only send on-demand notifications *after* the Cut-Off Date, providing managers with an account of activities during the course of the campaign.

Follow the instructions in the previous section to generate the campaign.

If you performed the steps above correctly, the **Send Notification** or **Send Reminder(s)** button displays at the top of the Campaign page.



When you are ready to send notifications to managers, click **Send Notification**. Specify the report template you want to send to managers, then click **Create Notification Email Queue**.

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Send Notification

This feature is used to send a summary notification of the outbound messages in this campaign grouped by Manager Email Address found in the address book associated with this campaign.

- Select the Notification Campaign Template from the list below.
- Click the **Create Notification Email Queue** button to have the system review the notification request.
- The system will then validate and create a campaign notification email queue from the information you submitted.
- Follow the instructions on the screen for the next steps to follow in the process. Click the confirmation button to complete your notification request, or correct errors so you can confirm.

- **NOTE:** If this campaign is in stage 3. *Approve* it will only send notifications for Sample Emails that you have sent via the **Send Sample Email** button.

Notification Campaign Template: Dynamic: Manager Notification ▾

Create Notification Email Queue

A message displays, based on the content of your Dynamic Address Book:


- A warning message displays if you do not have any manager email addresses in your Dynamic Address Book. Go to your Dynamic Address Book and add manager email addresses. You are required to have at least one manager email address in the related Dynamic Address Book. Note that if your Dynamic Address Book has email addresses for some managers and not for others, only managers with email addresses will receive the on-demand notifications.
- A success message displays if you have manager email addresses in your Dynamic Address Book.

When you see the success message, click **Confirm and Send Notifications** to actually send the emails.

Sending Reminders

After the end date of the campaign, and before the cutoff date, you can send reminder emails to users who have not yet taken the training.

To send training reminders:

1. Between the end date and cutoff date of the campaign, open the Campaign Manager and locate the campaign.
2. Click the pencil icon  to view edit the campaign.
3. At the top of the page, click **Resend Training Emails**.
4. Read the message, then click **Queue Training Emails**. The system checks for users who have not yet completed training.
5. Read the message and note the number of recipients who will receive the reminder email. To send the emails, click **Confirm and Resend Training Email**.

Figures

1. 2.generate.png
2. sendReminders2.png
3. sendNot.png
4. pencil.png

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