

Configure a New Automated Campaign

<https://campus.barracuda.com/doc/98219942/>

The following steps cover the initial creation and configuration of a new campaign. Note: you must have a [Dynamic Address Book](#) before you can create your 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** – Optional: 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: 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 sending the campaign emails.
- **End Date** – Select a future date and time on which to end the email delivery, 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.
- **Cutoff Date** – This is the actual end date of the campaign. 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.
 - When configuring an automated education campaign, if you use the reminder feature, reminders will continue to be sent to those that haven't completed the training until the cutoff date is reached.
- The remaining items in the scheduling section work just like those in a [standard campaign](#).

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. Optional: 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**. This is the button with the arrow in the blue circle in the upper-right corner of all pages.
- 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:
 - **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 a **Preview Image** using the **Browse** button to associate with this campaign. If no image is selected, the system will automatically choose one for you.

Save the Campaign

When you have completed all of the required actions above, click **Save** to save the campaign. The page refreshes.

The next step is to [Generate and Approve the Automated Campaign](#).

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