Agenda

Now that you have gotten your account set up, you are ready to launch your first campaign. In this meeting we will cover:

- ❑ An overview of two items that were covered in Implementation pt. 1
  - ❑ Learner Groups
  - ❑ PhishNotify
- ❑ PhishSim Campaign Creation
- ❑ AwareEd Campaign Creation
- ❑ Analytics
  - • Auto-reports
  - • Data Browser

Implementation 1 - Overview

Here is a refresher of two items that were covered during the first Implementation Call that you may find useful for your first campaign:

- **Group Creation** – For your first campaign, you may want to run a campaign to a specific group of learners. In the SecurityIQ platform, you can create two different types of groups:
    - <u>Static Groups:</u> This is where you can manually add and remove learners to/from the group
    - <u>Dynamic Groups:</u> With these types of groups you can select different learner's attributes or actions. Once these filters are selected, the group will query your learner base to add the learners who meet the specified criteria.

- **PhishNotify -** PhishNotify is a great tool for identifying potentially malicious emails that come into your learner's inbox, as well as simulated phishing emails sent out through SecurityIQ. This tool is available on Outlook, Office365, and Gmail as a Chrome Extension. You can access the different tools, as well as the Plugin Installation Instructions, in your Account Settings under the PhishNotify Section

PhishSim Campaigns

PhishSim Campaigns

What is a PhishSim Campaign? A PhishSim campaign is where you can assign simulated phishing email templates to go out to a specific group of learners. Each of the email templates that a learner receives will have an education associated to it; meaning that when they are phished, they will be brought to an education page. The education options available are:
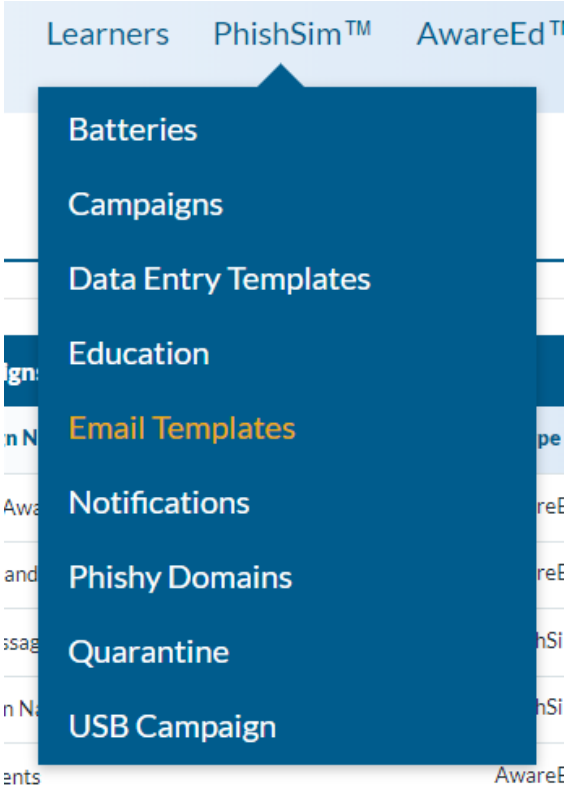
- Interactive training modules
- Static education page
- External URL
- Phishing Indicators

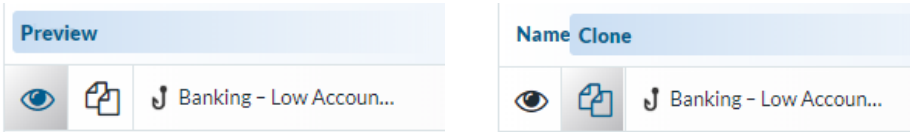You can also assign the type of attack for each email template. The different attack type options are:

- Drive-by
- Data Entry
- Attachment Attack
- Business Email Compromise

Email Templates

To access our Email Template library, login to SecurityIQ and locate PhishSim > Email Templates:

Learners   PhishSim™   AwareEd™

Batteries

Campaigns

Data Entry Templates

Education

Email Templates

Notifications

Phishy Domains

Quarantine

USB Campaign

Once you are on the Email Template page, you can preview and modify existing templates:

Preview

Banking – Low Accoun...

Name Clone

Banking – Low Accoun...

As well as, build Email Templates from Scratch:

New Template   ?

Email Template Editor

Tools: This will allow you to edit/add source code (HTML) to the email template.

From Email: You can change the from email by selecting the settings gear

Attack Type: This is where you can change the attack type of that specific email

Education: This is where you can change the education that a learner views after they get phished

Preview in Browser: This will allow you to preview as a learner, as well as send an email preview to yourself

Attack Types

Drive-by: This is where a learner clicks on any link in the PhishSim email that they receive

Attack Type:

Drive By	⌄

Attachment: This will add an attachment to the PhishSim Email that will track if a learner enables macros on that document

Attack Type:

Attachment	⌄

Difficulty:

★★★★★	⌄

Attachment Type:

-- select a file type --	⌄

Attachment Name:

Attachment Type:

-- select a file type --	⌄

-- select a file type --

Powerpoint

Word

Excel

Use Default Education

Data Entry: After a learner clicks on a link in the PhishSim email, they will be brought to a login page. SecurityIQ doesn't track the credentials being entered, as those are blank key strokes
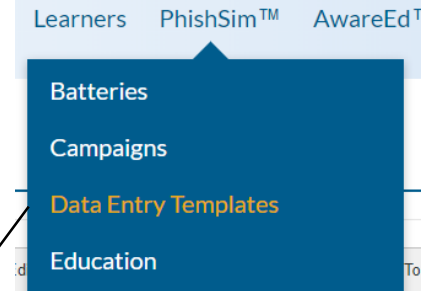
Attack Type:

Data Entry	⌄

Difficulty:

★★★★★	⌄

Site:

Mint Login(loginprotected.com)	⌄

Learners   PhishSim™   AwareEd™
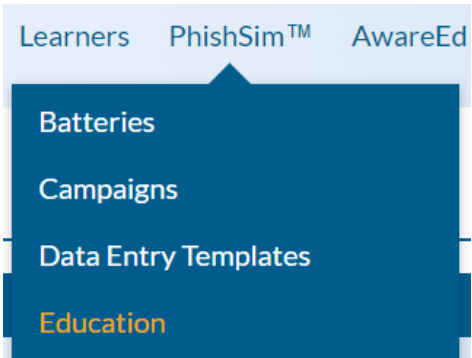
Batteries

Campaigns

Data Entry Templates

Education

To view a complete list of Data Entry Login Sites, please navigate to the Data Entry Template section in SecurityIQ

Business Email Compromise: These templates are requesting specific information for that learner and tracking to see if the responded back with sensitive information

PhishSim Education

To view all of the different types of education available for a PhishSim campaign, locate the Education section under PhishSim. On this page you will notice:

- o Five interactive AwareEd training video options
- o Pre-built static education pages

You can build custom education pages by selecting "New Education" in the top right corner. There are two other education options that you can assign learners to outside of Interactive and Static education pages

Phishing Indicators

When a leaner gets phished, they will be taken to a webpage that has a screen shot of the email that they were just phished on. Included on that screen will be specific call-outs to what the learner should have noticed prior to clicking on the link.

External Links

After a learner gets phished they will be redirected to an external link. To get this set-up, you will select "New Education" and insert the external URL that you will want to bring learners to.

PhishSim Batteries

After you have identified the email templates you will like to send to your learners, the next step would be to build a Battery. Think of a battery like a folder that contains the different templates you would like to launch in a campaign. To view available batteries, or to build one from scratch, navigate to "Batteries" under PhishSim:
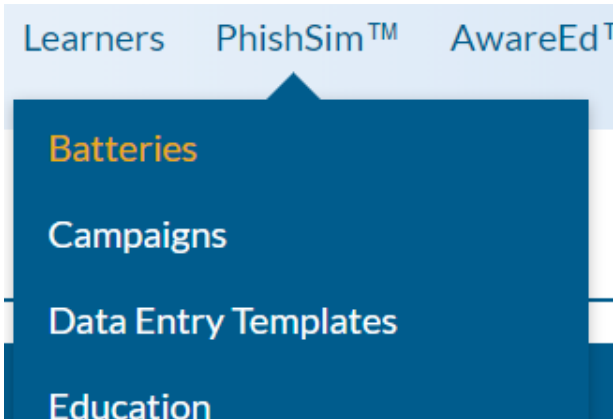
Select "New Battery" to select the specific templates that you would like the learners to receive during a campaign

We have pre-built Batteries that you can use during a campaign. The Batteries labeled Month 1-12 are part of our Security Excellence program. The Security Excellence program was built for those customer who want a plug-n-play option to schedule out a full year of campaigns to their learners.

Learners	PhishSim™	AwareEd™

Batteries
Campaigns
Data Entry Templates
Education

PhishSim / **Batteries**

New Battery | ?

Batteries			
Name		**Creator**	**Templates**
Baseline		SecurityIQ	3
Baseline - Blind		SecurityIQ	3
Month 1 - Establishing Baselines		SecurityIQ	3
Month 10 - Mobile, Wireless, and Rem...		SecurityIQ	4
Month 11 - Awareness Refresher		SecurityIQ	4
Month 12 - Advanced Awareness Topics		SecurityIQ	4
Month 2 - Phishing Deeper Dive		SecurityIQ	5

PhishSim Campaigns

After you have your Battery built, you are ready to schedule your campaign. To create and schedule a PhishSim campaign, navigate to Campaigns under PhishSim. On this page select "New Campaign":

1. **Campaign Name:** This isn't visible to the learners

2. **Branding:** Your default brand should be automatically selected. If you have multiple branding options, you can select the specific brand you want shown

3. **Learners:** This is where you can choose if you would want the campaign to go to…
   - All Learners
   - A Specific Learner Group
   - Individual Learners

4. **Content:** In this section you can select a specific template, battery, or category that you would like to send emails from simply by typing in the name.
   - Battery Options: By default, the learner will receive all of the templates that are selected. You can also choose how many templates each learner receives out of the battery or category by selecting "Send Random Phishing Templates". This option is recommended especially if using Categories, as some of our categories have 20+ templates

PhishSim Campaigns Continued

5. **Phished Actions**
   - Notification: This is a follow up email that gets sent to a phished learner that you can customize. You can also turn this follow up email off down in "Schedule"
   - Group: Prior to building your campaign, you can create a group that you would like phished learners to be added to

6. **Learner Replies:** This is for our Business Email Compromise attacks. By default, you can track if the person replied to the email. If you would like to see what the learner replied with, you would select the advance options that appears once the box is checked

7. **Schedule**
   - <u>Send Phishing Attacks Over Time:</u> This is where you can schedule out the email templates to be delivered to the learners over a period of time. For example: if you run a campaign for 30 days and you have three email templates going to each learner – the learner will receive those three email templates at random over the next 30 days
   - <u>Send Phishing Attacks at One Time:</u> This option will allow you to send out all of the templates at once. This option is great if you want to quickly test the email templates to see how they look – prior to deploying the campaign to all learners. To send out a quick test campaign, all you will need to do is select any time in the past. Once you schedule the campaign, the emails will get sent out as soon as our servers queue them up.

AwareEd Campaigns

What is an AwareEd Campaign? An AwareEd campaign consists of interactive training modules and/or assessments that you can enroll learners in for a certain period of time.

In this section, we will cover:
- How to navigate the Content Library
- Build Courses
- Build and Customize Assessments and Questions
- Create a Campaign

Content Library

To access our content library, navigate to AwareEd and select "Content Library". From there you can preview all the different modules and assessments that we have available.

Filter: In this section you can filter on Language, Content Type, Topic, Duration, and Exercise Count to narrow down your search

Modules: For each module, we have listed the:

- Description and Core Topics covered
- Number of Exercises: Our modules contain interactive exercises to keep the learner engaged, and test them on what they have learned
- Duration
- Available Languages

You can also add specific modules to a course by select the "+" symbol. Once selected, the module will be added to the course builder on the left-hand side

Course Builder

The course builder will appear in the Content Library once you have selected the "+" symbol on any of our modules and assessments.

Course Name: This is visible to the learner, so make sure that the name you choose is applicable to the learner.

Module Order: As you add content, it will be added in the module order section. You can rearrange the order of the content simply by dragging and dropping. You can also remove any content simply by selecting the "x"

Course Statistics: This will give you an overview of the number of modules in the course, total length, and the number of exercises included. Please note that the total length is the total length of the video + how long it takes the average learner to complete the exercises; it does not take in to account how long it takes learners to complete assessments.

Courses

To view the courses that you have built, or ones that we have built for you. Navigate to AwareEd and select "courses". On this page, you will see a number of courses that we have put together for specific job titles as well as courses that are part of our Security Excellence program

AwareEd / **Courses**

New Course | ?

Courses

Name	Creator	Modules
Month 4 - Malware	SecurityIQ	3
Month 5 - Social Engineering	SecurityIQ	4
Month 6 - Internet Security	SecurityIQ	4
Month 8 - Privacy and Data Security	SecurityIQ	2
Month 1 - Foundational Course 2	SecurityIQ	6
Month 9 - Removable Media	SecurityIQ	3
Month 10 - Mobile, Wireless, and Remote Access	SecurityIQ	4
Month 11 - Awareness Refresher Course 1	SecurityIQ	4
Month 11 - Awareness Refresher Course 2	SecurityIQ	4
Month 12 - Advanced Awareness Topics	SecurityIQ	4

Questions and Assessments

Assessments: These are quizzes that you can add to a course to test your learner on what they just learned.

You can view a list of pre-built questions and assessments by navigating to AwareEd and selecting either "questions" or "assessments".

- **Questions:** On this page, you can clone or create new questions from scratch
- **Assessments:** On this page, you can clone and make changes to existing assessments. You can also create assessments from scratch by selecting questions from our question library

AwareEd Campaign Creation

Once you have your course built with the selected modules and/or assessments, you are now ready to create your campaign. To accomplish this, please navigate to AwareEd and select "campaigns". Once on the campaigns page, click "new campaign".

- **Campaign Name:** This isn't visible to the learner, but will help you remember what content you deployed
- **Branding:** The branding option you select will be visible in the beginning of an AwareEd Module, on a learner's course page, and in the notification emails that they receive
- **Learners:** In this section you can select whether you want the campaign to be pushed out to:
  - All Learners
  - Learner Groups
  - Individual Learners
- **Courses:** In this section, you can locate the course that you would like to use by clicking on the dropdown menu. You can also select a default language from the dropdown. Please note that all of our modules are not available in every language, as well as the learner has the opportunity to select their preferred language on their course page
  - Begin Modules upon Page Upload: This will automatically start the videos
  - Require learners to retake failed assessments: If you have included an assessment, this will give the learner the opportunity to retake an assessment
  - Restrict access after campaign run completion: By default, learner will still have access to the training after the campaign run is complete. Select this option if you would like to restrict the learner from taking the training after the campaign has finished

AwareEd Campaign Creation Continued

o **Notifications:** These are emails that get sent out to the learner during the lifespan of the campaign. All of these notifications can be customized by navigating to the "Notifications" section under AwareEd

  o Enrollment Notification: Once you enroll the learners in a campaign, they will all receive an enrollment email. In this email, this will contain their unique training link that will bring them to the course page. Please note that no username or password is required for learners to access the training

  o Start and Finish Reminders: These emails will get sent out after the number of allotted days have passed

  o Completion Notification: A learner will receive this once they have completed their training

    o Completion Certificate: This will appear on the learner's course page once they have completed all of the training. This certificate cannot be customized at this time

o **Schedule:** In this section you can select what specific date you would like your campaign to start on, and how many days you would like it to run for.

  o Repeat: If you would like to repeat your campaign for additional runs, you can do so here. For example, if you initially scheduled the campaign for 30 days and had the repeat set to "1" – it would repeat the campaign for one additional 30 day run

o **Reset Enrollment:** This is only applicable if you have set up an EPP Integration

o **Reset Learner Progress:** If you have multiple runs in a campaign, the learners progress will reset once the new campaign run starts. If you would like to include only those learners who did not complete the training in the first box, you will need make sure the box isn't checked.

Reporting

Accessing Campaign Information

After you have launched the campaign, you can get real-time campaign information by:

- Hovering over the campaign name and select "Details"

- Then Select the bar graph on the right-hand side

- On this page, you will get an overview of who has been phished, who reported the attack using the PhishNotify plugin, etc.

Accessing Campaign Information Continued

Once in the Campaign Details, you can access two different types of reports:

1) **Auto-repots**

Campaign Details				
Name	**Future Runs**	**Learners**	**Education**	**Status**
Campaign Name	30 days x 5	1	3 Phishing Templates	Running

Once a campaign is launched, we automatically create a report specific to that campaign. To access the auto-report, simply click on the status of the campaign. This will bring you directly to the auto-report that will breakdown specifically what has happened in that campaign.

2) Learner activity report:

PhishSim / Campaigns / Campaign Name / **Campaign Run 1**   New Campaign   ?

Campaign Run Details								
Run	**Status**	**Start**	**End**	**Length**	**Learners**	**Templates**	**Open Rate**	**Phish Rate**
1	Complete	05/18/2018	05/18/2018	0 Days	1	3	100%	100%

When you select this option, it will download a .csv file of the learner information listed on that page.

Analytics

Data Browser: This is where you can build your own reports based off of learner timeline events, campaign data, groups, etc.

Auto-reports: These are pre-built Data-Browser reports that we have built and associated to different graphs for you to download as a PDF. These automatically get built for AwareEd and PhishSim campaigns. You can drill down on each section of the report by selecting the bar graph in the top right
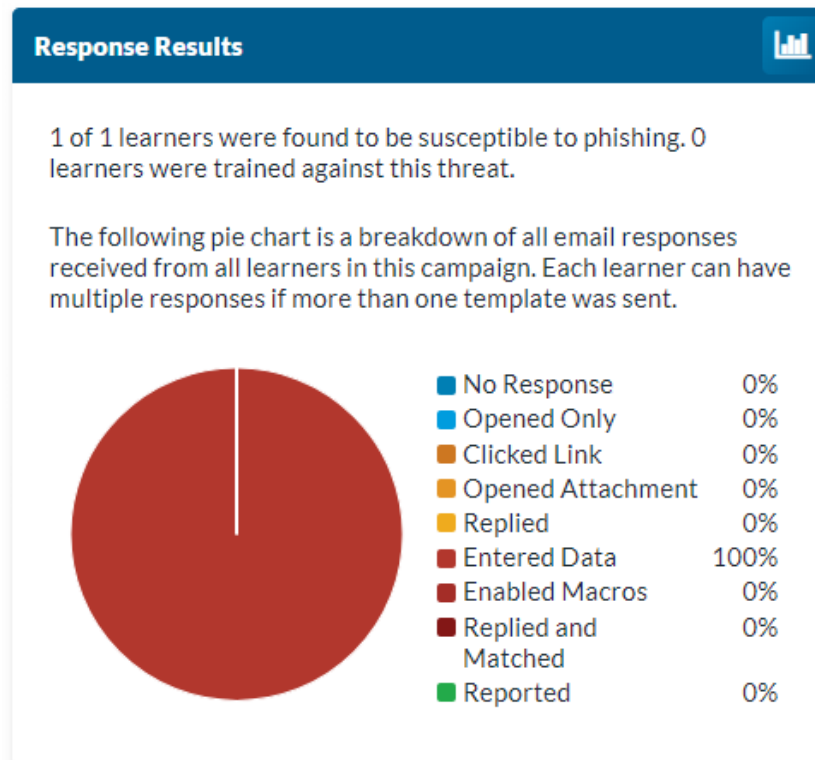
Where to go for additional support

You can contact support by clicking on the support ribbon in the SecurityIQ platform

How-to Videos: https://infosecinstitute.wistia.com/projects/nze2trlncp

User Manual: You can access our user manual two different ways in the platform. The first way is hovering over the settings gear in the top right corner and select "User Manual". The second way is to click the question mark in the top right of the page that will bring you directly to the part of the user manual that covers that section of SecurityIQ

Contact Information
- o Help Desk: (608) 492-0667 | customer-support@infosecinstitute.com