Security Awareness Training
Admin Guide
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Chapter 1: Security Awareness Training Admin Guide

To use the Security Awareness Training Admin Guide, see the following topic:

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- Enabling Sites for Security Awareness Training ............................................. 3
- Enabling for Existing Sites ........................................................................... 4
- Enabling for New Sites ................................................................................ 11
Security Awareness Training Overview

This admin guide is intended to help administrators understand how to manage the Webroot Security Awareness Training (SAT) platform, along with the features and functionality available within the platform.

Webroot Security Awareness Training (SAT) is a hosted platform integrated with Webroot Global Site Manager (GSM) that includes a fully featured phishing simulator along with training courses pre-loaded onto our integrated Learning Management System (LMS). Both the phishing simulator and training courses are managed through campaigns.

A campaign is a single phishing simulation or training course sent to a select group of users that provides the basis for reporting and managing Security Awareness Training.

As our client, you will be able to build phishing simulations through our easy to use Simulation Wizard. Using the wizard, you will be able to:

- Import your company’s email target list.
- Add your bait email and lure page by choosing from our pre-canned templates, or writing your own content.
- Send test emails to test the simulation.
- Schedule and launch your simulation against your targets.
- See reports in real-time:
  - Email processing and delivery.
  - Email opens and clicks.
  - Data post attempts to the lure page.
Enabling Sites for Security Awareness Training

To enable Webroot Security Awareness Training within the web console, you can do either of the following:

- Enabling for Existing Sites on page 4
- Enabling for New Sites on page 11
Enabling for Existing Sites

Use the following procedure to enable Security Awareness Training for an existing site.

To enable for an existing site:

1. For the site you want to enable, in the Actions column click the Manage button.

The Summary tab displays with the Summary tab active.
2. Click the **Security Awareness Training** tab.

The Security Awareness Training tab displays.
3. Select the **Enable Security Awareness Training** checkbox.
4. In the Keycode Type area, select either the **Full** or **Free 30 Day Trial** radio button.
5. Click the **Save Changes** button.

6. At any time, in the Security Awareness Training tab, you can view the Security Awareness Training target user count.
7. After the settings are saved, as needed, click the **Go To Security Awareness Console** button.

8. Additionally, in the Site tab, you can launch the Security Awareness Training console by clicking the **Settings** icon in the Security Awareness Training column.
Enabling for New Sites

Use the following procedure to enable Security Awareness Training for a new site.

To enable for a new site:

1. Select the Enable Security Awareness Training checkbox on the final step of new site creation.

For more information, see Adding Sites in the GSM Admin Guide.
2. In the Keycode Type area, select either the **Full** or **Free 30 Day Trial** radio button.
3. Click the Finish button.
Chapter 2: Working With The Security Awareness Training Console

To start working with the Security Awareness Training console, see the following topics:

- Creating New Campaigns Overview ................................................................. 15
- Building Campaigns ......................................................................................... 16
- Selecting Sites ................................................................................................. 21
- Creating Campaign Schedules .......................................................................... 25
- Reviewing and Launching Campaigns .............................................................. 30
- Filtering by Phishing or Training ....................................................................... 35
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Creating New Campaigns Overview

There are four parts to creating a campaign.

- Building Campaigns on page 16
- Selecting Sites on page 21
- Creating Campaign Schedules on page 25
- Reviewing and Launching Campaigns on page 30
Building Campaigns

Follow this procedure to build a campaign.

To build a campaign:

1. Log in to the Global console.

   The Global console displays.

2. Click the Security Awareness Training tab.

   The Security Awareness Training tab displays.
3. Click the **New Campaign** button.

![Image of the Security Awareness Training Console](image)

The New Campaign pane displays.
4. Click **1. Build Campaign**.

The Build Campaign panel displays.
5. In the Campaign Name field, enter a name for the campaign.

6. Select one of the following Campaign Type radio buttons:
   - Phishing
   - Training
7. Select an email template by doing one of the following:
   - Enter the name of the template
   - From the Any category drop-down menu, select a template.
   - Use the slide bar to visually scan for the email template you want to use.
   - You may also edit email templates directly from the campaign creation workflow by clicking on 
     Customize Template.

8. From the Landing Page URL drop-down, select the URL you would like for your landing page.

   **Note:** The drop-down menu only displays domains that have been verified.

9. Select one of the following Landing Page radio buttons
   - **Broken Link**
   - **Lure Page**

10. Do one of the following:
    - If you selected the Infographic radio button, select an infographic email template either by entering 
        the name, selecting a category, or using the slide bar to visually scan for the email template you want 
        to use.
    - You may also edit infographic templates directly from the campaign creation workflow by clicking on 
        Customize Template
    - If you selected the Broken Link radio button, from the 404 Type drop-down menu, select the type of 
        page you want to display for a broken link.

11. Continue with *Selecting Sites on page 21.*
Selecting Sites

Follow this procedure to select sites for your phishing or training campaign.

**Note:** Before beginning this procedure, you must have completed *Building Campaigns on page 16.*

To select a site:

1. Click 2. Select Sites.

The Select Sites panel displays.
2. Do either of the following to select the site:
   - Enter all or part of the site name, then click the name of the site to highlight it.
   - From the list, click the name of the one or more sites to highlight it.

   ![All Sites Table](image)

   **Note:** This capability allows you to send campaigns to multiple sites or just one site.

3. When you have selected the site or sites you want to send a campaign to, click the **Add** button to move those sites to the Sites Selected column.
The sites are moved to the Sites Selected column.
4. When you're done, click the **Save & Close** button.

5. Continue with *[Creating Campaign Schedules on page 25]*.
Creating Campaign Schedules

Follow this procedure to create schedules for your phishing or training campaign.

**Note:** Before beginning this procedure, you must have completed *Selecting Sites on page 21.*

To create a campaign schedule:

1. Click 3. Campaign Schedule.

The Campaign Schedule panel displays.
2. The Auto-Enrollment checkbox is the first option.
   - When Auto-Enrollment is enabled, as new users are added to sites, they will be automatically enrolled in any active campaigns for that site. Campaign duration is set by selecting the launch date and a duration period.
   - When Auto-Enrollment is disabled, new site users will not automatically be added to active campaigns. Campaign duration is set by manually selecting a start and end date.
Chapter 2: Working With The Security Awareness Training Console

3. Campaign Schedule

Auto-Enrollment
- Enroll all users that are added to the sites selected above into this campaign automatically

Duration
- Sep 3, 2020 - ...

Delivery Time
- Deliver emails at time of launch
- Deliver emails at custom time: 08:30 AM
- Spread email delivery out over period of 01 days

4. Review

Cancel Save & Close Launch Campaign
3. In the Duration field, enter the date range for the campaign.

4. In the Delivery Time area, select one of the following radio buttons:
   - **Deliver emails at time of launch**.
   - **Deliver emails at custom time**, then in the time fields, enter the time you want the emails delivered.
   - **Spread email delivery out over period of** days, then from the drop-down menu select the number of days you want to spread email delivery over.
5. Continue with *Reviewing and Launching Campaigns on page 30.*
Reviewing and Launching Campaigns

Following this procedure to review and launch your campaign.

To perform this procedure you must have first completed the following:

- Building Campaigns on page 16
- Selecting Sites on page 21
- Creating Campaign Schedules on page 25

To review and launch a campaign.

1. Click 4. Review.

The Review panel displays.
2. In the Preview Campaign field, enter the email address of the person who will preview the campaign and click the Send Preview button.
3. Review the following information:
   - Campaign Built
   - Sites Selected
• Campaign Schedule

![Campaign Schedule Image]

**Campaign Built**
- Name: Campaign name is required
- Type: Phishing

**Sites Selected**
- 2 Sites: 789 users
- Paul Test 2: 566 users
- Site 27 (QA): 223 users

**Campaign Schedule**
- Start Date: Deliver emails at time of launch
- End Date: -
- Delivery Period: -
- Delivery Time: Deliver emails all at once
4. Do either of the following:
   - To review again later or wait for additional information, click the **Save & Close** button.
   - To Launch the campaign, click the **Launch Campaign** button.
Filtering by Phishing or Training

Follow this procedure to filter on campaigns based on whether they are phishing or training campaigns.

To filter on campaigns:

1. Log in to the Global console.

   The Global console displays.

   ![Global Console](image1)

2. Click the Security Awareness Training tab.

   The Security Awareness Training tab displays.

   ![Security Awareness Training Tab](image2)
In the Campaign Management area, select either or both of the following checkboxes:

- Phishing Campaigns
- Training Campaigns

Note that next to each select is the number of campaigns of that type.
4. One of the following occurs:
   - If you select both checkboxes, all campaigns of that type displays.

<table>
<thead>
<tr>
<th>Status</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PhreshPhish-3</td>
</tr>
<tr>
<td></td>
<td>Shane Phishing Event sync test</td>
</tr>
<tr>
<td></td>
<td>Shane Test Phishing Clicks</td>
</tr>
<tr>
<td></td>
<td>PhreshPhish-2</td>
</tr>
<tr>
<td></td>
<td>PhreshPhish-1</td>
</tr>
<tr>
<td></td>
<td>SA-1142-TrainingCampaign-1</td>
</tr>
<tr>
<td></td>
<td>SA-1142-PhishingCampaign # 2</td>
</tr>
<tr>
<td></td>
<td>SA-1142-PhishingCampaign</td>
</tr>
<tr>
<td></td>
<td>PhishingCampaign-99</td>
</tr>
<tr>
<td></td>
<td>TrainCamp-11</td>
</tr>
</tbody>
</table>
If you select only one checkbox, only campaigns of that type displays.

<table>
<thead>
<tr>
<th>Status</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Launched</td>
<td>SA-1142-TrainingCampaign-1</td>
</tr>
<tr>
<td>Launched</td>
<td>TrainCamp-11</td>
</tr>
<tr>
<td>Launched</td>
<td>TraningCampaign-10</td>
</tr>
<tr>
<td>Launched</td>
<td>Shane Test course completion</td>
</tr>
<tr>
<td>Launched</td>
<td>TestCampaign-7</td>
</tr>
<tr>
<td>Ended</td>
<td>TestCampaign-6</td>
</tr>
<tr>
<td>Ended</td>
<td>TestCampaign-5</td>
</tr>
<tr>
<td>Ended</td>
<td>TestCampaign-4</td>
</tr>
<tr>
<td>Launched</td>
<td>Shane Test reminders</td>
</tr>
<tr>
<td>Launched</td>
<td>TestCampaign-3</td>
</tr>
</tbody>
</table>
Searching for Campaigns by Name

Follow this procedure to search for campaigns by name.

To search for a campaign by name:

1. Log in to the Global console.
   
   The Global console displays.

2. Click the Security Awareness Training tab.

   The Security Awareness Training tab displays.
3. In the Search for a campaign field, enter the name of the campaign you want to find.

4. The system displays all campaigns with that name.

Note: If you enter a part of the name, the system returns all potential entries that contain those letters.
Searching for Campaigns by Status

Follow this procedure to search for campaigns by status.

To search for a campaign by status:

1. **Log in to the Global console.**
   
The Global console displays.

2. **Click the Security Awareness Training tab.**
   
The Security Awareness Training tab displays.
3. From the Status drop-down menu, select the checkbox next to the statuses that you want to search on.

You can select multiple statuses.
The system displays all campaigns with that status.
Accessing the Security Awareness Training Dashboard

While working on the Security Awareness Training console within the management console, you might need access to some functionality that is currently only available in the Security Awareness Training dashboard. This functionality includes being able to design and customize phishing and training campaigns. For more information, see the following topics:

- Creating And Launching Phishing Simulations Overview on page 47
- Creating Training Campaigns Overview on page 114

Follow this procedure to access the dashboard.

To access the Security Awareness Training dashboard:

1. Log in to the Global console.

   The Global console displays.

2. Click the Security Awareness Training tab.
The Security Awareness Training tab displays.

![Security Awareness Training Tab](image)

3. In the Sites column, click the link for the dashboard for the site you want to access.

![Sites Column](image)

The Security Awareness Training dashboard displays.

![Security Awareness Training Dashboard](image)
Chapter 3: Creating and Launching Phishing Simulations

To create and launch phishing simulations, see the following topics:

- Creating And Launching Phishing Simulations Overview .................................................. 47
- Creating Phishing Simulations ............................................................................................ 48
- Designing Phishing Emails .................................................................................................. 62
- Designing Phishing Sites ..................................................................................................... 69
- Designing Education Pages ............................................................................................... 76
- Creating Training Modules ................................................................................................. 78
- Creating Templates and Infographics .................................................................................. 90
- Designing Lure Pages ......................................................................................................... 100
- Designing Broken Link Pages ............................................................................................ 104
- Reviewing and Sending Phishing Simulations ................................................................. 107
- Selecting Sites in the Dashboard ......................................................................................... 111
Creating And Launching Phishing Simulations

Overview

By default, phishing simulations are only available to launch against your authorized domains. You will not be able to target email addresses outside of your authorized domains list. These types of tests are generally ran by your company IT or security team. More information on managing domains and importing users is found below and a step-by-step available within the Security Awareness Training Getting Started Guide.

Before running any simulations against your organization, you should consult with your company’s IT and/or security team to alert them of the tests, and maximize the success of your simulation. If you are a security consultant, you can contact us to become a verified security consultant to launch campaigns for your clients.

**Note:** Email addresses on ISP or public domains (for example @gmail.com, @yahoo.com, etc.) are restricted and cannot be used within the Securecast service. Target email addresses must be valid company or organization addresses.

There are three steps to creating and launching a phishing simulation:

- [*Creating Phishing Simulations on page 48*](#)
- [*Designing Phishing Emails on page 62*](#)
- [*Designing Phishing Sites on page 69*](#)
Creating Phishing Simulations

Follow this procedure to create a phishing simulation.

To create a phishing simulation:

1. Log in to the Global console.
   The Global console displays.

2. In the Sites tab, click the Go to Security Awareness Training icon.
   The Security Awareness Training console displays.
3. In the Nav bar, click the **New Campaign** icon.

The Starting a Campaign panel displays.
4. Click the **Start a new simulation** link.

![New Campaign Wizard panel](image)

The New Campaign Wizard panel displays.
Chapter 3: Creating and Launching Phishing Simulations

WEBROOT

New Campaign Wizard

Simulation Basics

The phishing simulation email you are viewing may be a sample of a “real world” phishing email used to phish individuals or businesses. Any email sample is provided to you for educational and illustrative purposes only. Any registered or unregistered trademark, service mark, logo, or domain (collectively, “Marks”) (or their likeness), or any copyrighted material, shown or used here, are or may be the property of the Mark and copyright owner.

Simulation Name

Simulation name. Example: New Hire Test

Description

Describe your campaign. Example: April Test

Show Advanced Options

Save Simulation

- 51 -
5. In the Simulation Basics area, populate the following fields:
   - **Simulation Name** — Enter a name for your simulation.
   - **Description** — Enter a description for your simulation. This is an optional step.
6. As needed, select the **Show Advanced Options** checkbox to display the advanced options area.

The Advanced Options area displays.
Advanced Options:

Start Date: 

Randomize Delivery: 

Expiration:

Notifications: 

- On mail open
- On link click
- On form post

Notification Email: 

cpiiz@webroot.com

Options:

- Anonymize target email addresses after sending

Save Simulation
7. In the Advanced Options area, populate the following fields:

- **Start Date** — Enter a start date to schedule the launch of the campaign for a future date. If this is left blank, the campaign will start when you click the *Launch* button at the end of the wizard.

- **Randomize Delivery** — Enter the number of days to randomize the delivery of phishing emails over a period of time.
  - Use the **Up** and **Down** arrows to set your number of days.
  - Workday span will configure the randomization over the working hours you set.
  - The time zone is automatically configured using your computer’s time zone.

- **Expiration** — Enter the last date of the campaign, and wrap up reporting for the campaign.

- **Notifications** — Select one of the following to determine when notification emails will be sent:
  - On mail open
  - On link click
  - On form post

  **Note:** These notification emails are sent for every action chosen and may become quite frequent for larger campaigns.

- **Notification Email** — Enter the email to which notifications should be sent.

- **Options Anonymize Target Email Addresses After Sending** — Select this checkbox to anonymize the reporting data and not display who opened or clicked. This is useful for organizations concerned about sharing who performed which actions.
8. Click the **Save Simulation** button.
Chapter 3: Creating and Launching Phishing Simulations

Advanced Options:

Start Date:  

Randomize Delivery:  

days

Expiration

Notifications:

- On mail open
- On link click
- On form post

Notification Email:  
cpiiz@webroot.com

Options:

- Anonymize target email addresses after sending

Save Simulation
The Simulation Wizard: Unlaunched panel displays, with all of the fields populated.
9. When you’re ready, click the **Save/Next** button.

The Targets pane displays, with the Target tab active.
10. Do one of the following to determine the targets you would like to send the phishing simulation to:
   - Select one or more users by selecting the checkbox next to their name.

   ![Checkbox selection example]

   - Click the **Tags** button and select users based on their tag. To do this, from the Select tags to search drop-down menu, select the tag of the users you want to send the email to. You can select multiple tags, as needed.

   ![Tag selection example]
Note: For information on how to create tags so that they display in the drop-down menu, see *Importing Targets on page 229.*

11. When you’re ready, click the **Save/Next** button.

You’ve now created a phishing simulation and can move on with the next step, *Designing Phishing Emails on page 62.*
Designing Phishing Emails

Follow this procedure to design phishing emails.

**Note:** Before beginning this procedure, you must first [create a phishing simulation](#).

**To design a phishing email:**

1. Once you've created a phishing simulation, from the Email Template drop-down menu, select a phishing email from one of our default templates.

   ![Image of Email Template Menu]

   The template you have selected displays.
2. Do any of the following:
   - Use the email template as is.
   - Click the **Customize this template** button to use the WYSIWYG editor to modify the template for your phishing email.
• Click the **Use empty template** button to use the WYSIWYG editor to create a phishing email from scratch.
3. If you clicked the Customize this template button or the Use empty template button, the email WYSIWYG editor displays.
4. As needed, either update or populate the following fields:
   - From Name
   - From Address
   - Subject

5. In the Email Body area, enter information or instructions to complete the phishing scenario.

6. Use the WYSIWYG editor to configure and customize your text.

   Note: Hover over each icon to see its function.

7. Enter variables as needed. Variables include:
   - [FIRSTNAME] — Replaces the variable with the recipient’s first name.
   - [LASTNAME] — Replaces the variable with the recipient’s last name.
   - [EMAIL] — Replaces the variable with the recipient’s email.
8. When you’re ready, click the **Save Changes** button to return to the Wizard.

![Email Template Example]

9. If you would like to use the template you have just created again in the future, select the **Save email as template** checkbox.
10. You’ve now created a phishing simulation and can move on with the next step, *Designing Phishing Sites on page 69.*
Designing Phishing Sites

Follow this procedure to design phishing sites.

**Note:** Before beginning this procedure, you must first design a phishing email.

To design a phishing site:

1. Once you've created your phishing email, click the **Save/Next** button.

   ![Design Phishing Site Panel](image)

The Design Phishing Site panel displays.
Note: Also on this page is the area where you would design an Education Page for a training program. For more information, see Designing Education Pages on page 126.
2. In the URL Hostname field, do either of the following:
   - Enter a fake URL name.
   - Click one of the suggested URL types.

3. In the Site Type area, click one of the following buttons to determine what type of site you want to design that your user will be sent when they click on a link:

   ![Site Type Buttons]

   **Note:** Depending on button you click, the area below displays the fields that you will need to populate to create that type of phishing page or link.
<table>
<thead>
<tr>
<th>To Create This...</th>
<th>Click This...</th>
</tr>
</thead>
</table>
| **An Education Page** | The *Education Page* button.  
When you click this button, scroll down the page and create an education page.  
When a target clicks the link in the email, they will be taken directly to that education page, which will either provide a training module or an informational graphic.  
For more information, see *Designing Education Pages on page 76*. |
| **A Lure Page** | The *Lure Page* button.  
When you click this button, scroll down the page and create a lure page.  
When a target clicks the link in the email, they will be taken to the lure page, which will then provide either a training module or an informational graphic.  
For more information, see *Designing Lure Pages on page 100*.  
These templates are customizable, or you can create your own. Lure pages are optional and used to add an extra web landing page after a user clicks an email lure and before you take the user to education or a 404 broken link page. |
To Create This... | Click This...
---|---
A Broken Link Page | The **Broken Link** button.

When you click this button, scroll down the page and create a Broken Link page.

When a target clicks the link in the email, they will be taken to the 404 page.

For more information, see *Designing Broken Link Pages on page 104*.

**Note**: An Education page cannot be used with a Broken Link page.
4. When you’ve selected the type of site to send your users to, select one of the following:

<table>
<thead>
<tr>
<th>To Send A User To...</th>
<th>Do This...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A Training Module</strong></td>
<td>Click the Training Module button, then select the module you want to send the user to. You can customize the landing page for the training module using the custom branding and log, background image, title, and intro settings available.</td>
</tr>
<tr>
<td><strong>A Template or Infographic</strong></td>
<td>Click the Template or Infographic button, and select one of our pre-built education templates. Similar to the phishing email templates, these can be customized and saved in the WYSIWYG editor.</td>
</tr>
</tbody>
</table>

5. Click the **Save/Next** button.

   The final review panel displays.
6. Continue with **Reviewing and Sending Phishing Simulations on page 107.**
Designing Education Pages

Follow this procedure to create an education page where targets will be taken when they click on a link in a phishing email.

Keep in mind that you are still working on the process of creating and launching a phishing simulation. This is the part of the process where you create the final step of sending targets to education pages that will lead them to a training campaign or an informational graphic.

To create an education page:

1. Once you have completed Designing Phishing Emails on page 62 and selected the name of your URL, click the Education Page button.

2. Scroll down and click one of the following buttons:

<table>
<thead>
<tr>
<th>To Send A User To...</th>
<th>Do This...</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Training Module</td>
<td>Click the Training Module button, then select the module you want to send the user to.</td>
</tr>
<tr>
<td></td>
<td>You can customize the landing page for the training module using the custom branding and log, background image, title, and intro settings available.</td>
</tr>
<tr>
<td></td>
<td>For more information, see Creating Training Modules on page 78.</td>
</tr>
<tr>
<td>A Template or Infographic</td>
<td>Click the Template or Infographic button, and select one of our pre-built education templates.</td>
</tr>
<tr>
<td></td>
<td>Similar to the phishing email templates, these can be customized and saved in the WYSIWYG editor.</td>
</tr>
<tr>
<td></td>
<td>For more information, see Creating Templates and Infographics on page 90.</td>
</tr>
</tbody>
</table>
Creating Training Modules

Follow this procedure to create a training module that your targets will be directed to when they click on a link in a phishing email.

A training module takes your targets through basic training to teach them about phishing scams.

For more information, see Designing Phishing Sites on page 69.

To create a training module:

1. From the Design Phishing Site Page, click the Education Page button.
2. Click the **Training Module** button.

3. In the Select a training module column, select a pre-designed training module. For example, you might select a short video that discusses phishing scams.
To the right is where you will populate fields and customize the look and feel of the training.
Module: UK Compliance: Freedom of Information

Branding/Logo Image URL: 

Background Images: 

Custom Background Image URL: 
https://s3-us-west-2.amazonaws.com/seca-ap

Module Title:
UK Compliance: Freedom of Information

Intro/description:
This course will help you understand the Freedom of Information Act 2000 and put it into practice where you work. Duration: 20 minutes
4. In the Branding/Logo Image URL field, enter the URL where your company's logo is located.

5. If you would like a different background image than the one already connected with the module, from the Background Images drop-down menu, select a different background. The background image displays to the right of this field so that you can view it in advance.
The square field displays the image you have selected.
6. If you have a custom background image stored online, in the Custom Background Image URL field, enter the URL for that image.
7. In the Module Title field, you can leave the title of the module as is, or you can update to customize for your business.
8. In the Intro/description WYSIWYG editor, you can leave the description of the module as is, or you can update and format to customize for your business.
Module: UK Compliance: Freedom of Information

Branding/Logo Image URL:  

Background Images:  
Ayers Rock

Custom Background Image URL:  
/ims/launchtheme/images/backgrounds/ayers

Module Title:  
UK Compliance: Freedom of Information

Intro/description:
This course will help you understand the Freedom of Information Act 2000 and put it into practice where you work. Duration: 20 minutes
9. As needed, click the **Preview** button to preview what the training looks like.
10. When you're ready, click the **Save/Next** button at the top right of the page.
Creating Templates and Infographics

Follow this procedure when you've decided to create an Infographic Page where your targets will be taken when they click on a link in a phishing email.

An infographic is a page that displays a message to tell your target that they took the bait, or that they fell for a phishing scam. It's an easy way to demonstrate how easy it is to fall for a phishing attack.

For more information, see Designing Phishing Sites on page 69.

To create an infographic:

1. From the Design Phishing Site page, click Education Page button.
Chapter 3: Creating and Launching Phishing Simulations

2. Click the **Template or Infographic** button.

The Education Template displays.
Security Awareness Training Admin Guide

Simulation Wizard: Unlaunched
Site: phishing Site
Permissions: unlaunched

80% Complete

URL Hostname
http://gmail
admin-alerts.com

Site Type
Education Page
Link Page
Broken Link

When a target clicks the link in the email, they will be taken directly to the education page.

Design Education Page

Education Template
Template or Infographic

Customize this template

- Enable "Powered By" logo: Webroot
- Add branding to Education
3. From the Education Template drop-down menu, select an infographic template.

Alternately, you can click the **Browse** icon, and select your Education Template visually.
4. Do any of the following:
   - Use the infographic template as is.
   - Click the **Customize this template** button to use the WYSIWYG editor to modify the template for your phishing email.
   - Click the **Use empty template** button to use the WYSIWYG editor to create a phishing email from scratch.

If you clicked the **Customize this template** button or the **Use empty template** button, the email WYSIWYG editor displays.
5. Use the editor to add or delete images, or to change and format the text.
6. To hide that the training comes from Webroot, select the **Disable Powered By Logo** checkbox.
7. To add your own company's branding, select the **Add branding to Education** checkbox.

8. If you selected the Add branding to Education checkbox, populate the following fields:
   - Select the **Use custom HTML** checkbox to display a WYSIWYG editor.
   - In the Image URL field, enter the URL for an image that you store online, for example, a company logo.
   - In the Text field, enter the text that you want to display with your infographic.
   - In the Link URL field, enter the URL for your link.
   - In the Preview field, you can preview what your infographic page looks like.
9. When you're ready, click the **Save/Next** button in the upper right corner.
Designing Lure Pages

A Lure Page is a page that acts as a continuation of the phishing test and presents an imitation login page. It's a way to demonstrate how easy it is to fall for a phishing attack.

Lure Page templates are customizable, or you can create your own. Lure pages are optional and used to add an extra web landing page after a user clicks an email lure and before you take the user to education or a broken link page.

Follow this procedure when you've decided to design a Lure Page where your targets will be taken when they click on a link in a phishing email.

For more information, see Designing Phishing Sites on page 69.

To create a lure page:

1. From the Design Phishing Site page, click the Lure Page button.
2. From the Lure Page drop-down menu, select a pre-formatted lure page.

Alternately, you can click the **Browse** icon, and select your Lure page visually.
3. Do any of the following:
   - Use the lure template as is.
   - Click the **Customize this template** button to use the WYSIWYG editor to modify the template for your phishing email.
   - Click the **Use empty template** button to use the WYSIWYG editor to create a phishing email from scratch.

If you clicked the **Customize this template** button or the **Use empty template** button, the email WYSIWYG editor displays.
4. Use the editor to add or delete images, or to change and format the text.

5. When you're done, click the **Save Changes** button.
Designing Broken Link Pages

Follow this procedure when you've decided to design a Broken Links page where your targets will be taken when they click on a link in a phishing email.

An Broken Links page is a page that displays what looks like a webpage that is a dead end, similar to a 404 page.

For more information, see Designing Phishing Sites on page 69.

**Note:** An Education page cannot be used with a Broken Link page.

To create a broken link page:

1. From the Design Phishing Site page, click the **Broken Link** button.

A list of broken link types displays.
2. From the 404 Type drop-down menu, select a broken link page type.
3. When you're ready, click the **Save/Next** button in the upper right corner.

4. Continue with [Reviewing and Sending Phishing Simulations on page 107](#).
Reviewing and Sending Phishing Simulations

Once you've created and designed the parts of your phishing simulations, you are given a chance to review the simulation before you send it. Follow this procedure to review your phishing simulation.

For more information, see Creating Phishing Simulations on page 48.

To review a phishing simulation:

1. Notice that at the top of the page, it indicates that you've completed 100% of the tasks needed to create a phishing simulation.

2. Select any of the following tabs to review your campaign settings before sending:
   - Simulation Details — Reflects the information you entered when you first created your phishing simulation. For more information, see Creating Phishing Simulations on page 48.
   - Targets — Reflects the targets you selected to send the phishing simulation to. For more information, see step 10 in Creating Phishing Simulations on page 48.
   - Phishing Email — Reflects the information you entered when you designed your phishing email. For more information, see Designing Phishing Emails on page 62.
   - Phishing Websites — Reflects the information you entered when you designed your phishing site. For more information, see Designing Phishing Sites on page 69.
3. Optionally, you can enter the email address of another individual you would like to have review the simulation.
4. We recommend that you click the **Send test** button to send yourself a sample of your phishing email before launching your campaign.

![Simulation Wizard: Unlaunched](image)

5. When you’re done, click the **Schedule Launch Simulation** button to launch your campaign.

![Simulation Wizard: Unlaunched](image)
6. To find out how your simulation went, see *Accessing Training Reports on page 171.*
Selecting Sites in the Dashboard

Follow this procedure to select a specific site to work on while you are in the Security Awareness Training dashboard.

To select a site:

1. **Log in to the Global console.**
   
The Global console displays.

2. In the Sites tab, click the **Go to Security Awareness Training** icon.

The Security Awareness Training console displays.
3. In the Site drop-down menu, select the site you want to work with.

The site you want to work with displays.
# Chapter 4: Creating Training Sessions

To create training sessions, see the following topics:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating Training Campaigns Overview</td>
<td>114</td>
</tr>
<tr>
<td>Selecting Trainees</td>
<td>115</td>
</tr>
<tr>
<td>Designing Invitation Emails</td>
<td>122</td>
</tr>
<tr>
<td>Designing Education Pages</td>
<td>126</td>
</tr>
</tbody>
</table>
Creating Training Campaigns Overview

Training campaigns are used to invite trainees to take one of Webroot Security Awareness’ pre-loaded training courses. Creating and launching a training campaigns includes the following steps:

- Selecting Trainees on page 115
- Designing Invitation Emails on page 122
- Designing Education Pages on page 126

Note: You can send employees to a training campaign, even without sending them a phishing campaign.
Selecting Trainees

Use the following procedure to select trainees for training sessions.

To select a trainee:

1. **Log in to the Global console.**
   
The Global console displays.

2. In the Sites tab, click the **Go to Security Awareness Training** icon.
   
The Security Awareness Training console displays.
3. In the Nav column, click the **New Campaign** icon.

The Starting a Campaign panel displays.
4. Click **Start a new training session**.

The New Campaign Wizard displays.
5. In the Training Session Basics area, populate the following fields:
   - **Simulation Name** — Enter a name for your simulation.
   - **Description** — Enter a description for your simulation. This is an optional step.

6. As needed, select the **Show Advanced Options** checkbox to display the advanced options area.

   The Advanced Options area displays.

7. In the Advanced Options area, populate the following fields:
   - **Enable Registration** — Provides a registration URL once you complete the setup of your course.
     - The URL link is unique to this course and can be used to register new users to the SAT service and to this course.
     - The URL can be posted to an internal website or sent out in a welcome email to new employees or those you wish to invite to the course.
• Users who click the URL will be presented with a form prompting them to enter their email address to register for the course, which will then send an email invite to the user to take the course.

• **Start Date** — Enter a start date to schedule the launch of the campaign for a future date. If this is left blank, the campaign will start when you click the Launch button at the end of the wizard.

• **Expiration** — Enter the date when the campaign should be completed for reporting and reminder purposes. This date is optional and can be left open-ended.

• **Reminders** — Set to daily or weekly and are activated from the Expiration Date. Reminders are sent daily or weekly until the Expiration date is reached.

8. Click the **Save Training Session** button.

9. Click the **Save/Next** button.
10. On the next pane, do one of the following to determine the targets you would like to send the phishing simulation to:

- Select one or more users by selecting the checkbox next to their name.

- Click the **Tags** button and select users based on their tag. To do this, from the Select tags to search drop-down menu, select the tag of the users you want to send the email to. You can select multiple tags, as needed.
11. When you’re done, click **Save/Next**.

You’ve now created a selected your trainees, and can move on with the next step, *Designing Invitation Emails on page 122.*
Designing Invitation Emails

Follow this procedure to create an invitation email.

**Note:** You need to have invited trainees before you design your invitation emails. For more information, see *Selecting Trainees on page 115*.

To design an invitation email:

1. Once you've selected trainees for your training program, do one of the following to determine the email template that will be used for the actual training invitation.
   - Use our pre-built Basic Training Invitation template, as is.
   - Use our WYSIWYG editor to customize the Basic Training Invitation email.

2. To design your training email, from the Email Template drop-down menu, select a phishing email from one of our default templates.
3. Click the **Customize this template** button to use the WYSIWYG editor to modify your training email, as needed.

**Note:** You can save your customized templates for future use by selecting the **Save email as template** checkbox, naming the custom template, then clicking the Save this email as a template button.
The Customize Email Template window displays.

**Customize Email Template**

(Changes made here affect only this campaign. The original email template will not be modified)

**From Name**

Webroot Training Invites

**From Address**

training-invite

**Subject**

Webroot Training Invite

**Email Body**

[firstname],

You have been invited to take part in a training session by your company. Please click here to start the course.

If you have any questions, please contact your administrator.
4. Populate the following fields:
   - From Name
   - From Address
   - Subject

5. In the Email Body area, enter information or instructions to complete the phishing scenario.

6. Use the WYSIWYG editor to configure and customize your text.

   **Note:** Hover over each icon to see its function.

7. Enter variables as needed. Variables include:
   - \[FIRSTNAME\] — Replaces the variable with the recipient’s first name.
   - \[LASTNAME\] — Replaces the variable with the recipient’s last name.
   - \[EMAIL\] — Replaces the variable with the recipient’s email.

8. When you’re ready, click the **Save Changes** button.

9. When you’re done, click **Save/Next**.

   You’ve now designed an invitation email and can move on with the next step, *Designing Education Pages on page 126*, to send to those trainees.
Designing Education Pages

Follow this procedure to design an education page.

Note: You must first have completed the task of Designing Invitation Emails on page 122.

To design an education page:

1. From the list, select a training module.

When you select a module; the following occurs:
- The panel expands to display information about the module.
- The Intro/Description area populates with that information.
2. To view the training module, click the **Preview** button.

![Select a training module](image)

3. As needed, do any of the following to customize the landing page your users will be sent to when they click the link in the training invitation.
   - In the Branding/Logo Image URL field, enter the URL of a company logo or image you want to use.
   - From the Background Images drop-down menu, select a background image or use a custom image.
   - In the Module Title field, you can do either of the following:
     - Leave the default module title.
     - Enter a new module title.
In the Intro/Description area, edit the text as needed.
4. When you’re done, click the **Save/Next** button.

The Review and Launch panel displays.
5. Before you launch the training, we recommend that you do the following:
   
   - Review your settings.
   - Send a test invitation to yourself to ensure you are satisfied with the look and feel of the training invitation and training landing page.
Send out a test invitation to another individual for review.
6. When you are ready to send out your invitations to your targets, click the **Launch Training** button.
Chapter 5: Working With Programs and Campaign Scheduling

To start working with programs and campaign scheduling, see the following topics:

- Programs And Campaign Scheduling Overview ......................................................... 135
- Sending Welcome Emails ......................................................................................... 136
- Scheduling Phishing Campaigns .............................................................................. 147
- Creating Training Campaigns ................................................................................ 154
- Sending Campaign Summary Reports .................................................................... 159
- Understanding Email Types .................................................................................... 160
Programs And Campaign Scheduling Overview

Programs is a feature that allows you to schedule multiple campaign tasks with the goal of helping automate your training program. Tasks available for scheduling include:

- Sending Welcome Emails on page 136
- Scheduling Phishing Campaigns on page 147
- Creating Training Campaigns on page 154
- Sending Campaign Summary Reports on page 159
- Sending Welcome Emails on page 136
Sending Welcome Emails

Welcome Emails are generally used for sending out an introduction to your new Security Awareness program to end users, management, IT staff, etc.

- You can use the Welcome Email task as the first introductory email to your users or consider scheduling it after your first Phishing Campaign to introduce Security Awareness after a baseline phishing simulation has been run.
- Welcome Email is a template type and can be created, edited and managed under the Settings tab in the Menu bar.
- This email task can be scheduled at a date and time you specify.

To send a Welcome Email:

1. **Log in to the Global console.**
   
   The Global console displays.

2. **Click the Go to Security Awareness Training icon.**

   The Security Awareness Training dashboard displays.
3. In the Nav bar, click the Programs tab.

The Programs panel displays.
No Programs found. Create a program to see it here.
4. Do one of the following:
   - If this is the first program you’re creating, click the Create a program link.
   - If this is not the first program you’re creating, click the Create a new Program button.

   ![Image of the interface with "Create a program" and "Create a new Program" highlighted]

In either case, the New Program panel displays.
5. Click the **Welcome Email** button.

The Welcome Email edit panel displays.
6. Populate the following fields:
   - **Program Name** — By default, the field is populated with the name of the program, but you can edit this as needed.
   - **Description** — Enter a description of the welcome email. This is an optional field.
   - **Program Schedule** — Click an available task from the right to add it here.
- Task — By default, the field is populated with the name of the task, in this case, Welcome Email, but you can edit this as needed.
- Send Date — Click the Calendar icon to select a date to send the welcome email.
- Time — When you select a date, the time fields display. As needed, select a time either in the morning or the afternoon to send the welcome email.
- Template — From the drop-down menu, select a welcome email template.
- Recipients — Do both of the following:
  - Click the Search recipient targets field to display a list of targets to select from.
  - Click the Select recipient tags field to display a list of tags to select from.

7. Click the Add button to add email addresses of individuals who will receive a report about the campaign after it closes. This is an optional step.
Chapter 5: Working With Programs and Campaign Scheduling

Program Name
Annual Security Training

Description

Program Schedule
Click an available task from the right to add it here.

Send Email
Task: Welcome Email
Send Date
Template

Recipients

Email Reports
Optional! When a campaign closes, you can send its report to an email address provided here.

Cancel
Create Program

Done editing task
8. When you’re done modifying the welcome email, click the **Done editing task** button.
9. When you’re done, click the **Create Program** button.

The Welcome Email is now listed in the Programs panel.
Security Awareness Training Admin Guide

Programs

<table>
<thead>
<tr>
<th>Name</th>
<th>Owner</th>
<th>Status</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Training</td>
<td><a href="mailto:JaneDoe@gmail.com">JaneDoe@gmail.com</a></td>
<td>active</td>
<td>3/25/2019</td>
</tr>
</tbody>
</table>

Create a new Program
Scheduling Phishing Campaigns

After you create a phishing campaign, you can schedule it to run at a date and time you specify. You can schedule multiple phishing campaign tasks to help automate your security awareness program.

To schedule a phishing campaign:

1. Log in to the Global console.

   The Global console displays.

2. Click the Go to Security Awareness Training icon.

   The Security Awareness Training dashboard displays.
3. In the Nav bar, click the Programs tab.

The Programs panel displays.
4. Do one of the following:
   - If this is the first program you’re creating, click the **Create a program** link.
   - If this is not the first program you’re creating, click the **Create a new Program** button.

In either case, the New Program panel displays.
5. Click the **Phishing Campaign** button.

The edit area displays.
6. Do one of the following:
   - In the Task field, enter a unique name for the campaign.
   - From the Campaign drop-down menu, select the phishing campaign you want to schedule.

7. Populate the Start Date field to set the date and time you want to send your Phishing Campaign.
8. Populate the End Date field to determine when to complete the campaign and finalize reporting.

9. Select recipient targets can be selected from the picker individually or by entering tags.

10. Select the **Send report after this campaign closes** checkbox to schedule a campaign summary report to be sent to email addresses you enter.

**Note:** Phishing campaigns are scheduled using Programs, and can be created and configured using Campaigns or Create New Campaign options in the menu.
Creating Training Campaigns

This task will schedule a training campaign to be run at a date and time you specify very similar to a phishing campaign. You can schedule multiple training campaign tasks to help automate your security awareness program.

To create a training campaign:

1. **Log in to the Global console.**
   
The Global console displays.

2. **Click the Go to Security Awareness Training icon.**
   
The Security Awareness Training dashboard displays.
3. In the Nav bar, click the Programs tab. The Programs panel displays.
The Programs panel displays.

4. Do one of the following:
   • If this is the first program you’re creating, click the Create a program link.
   • If this is not the first program you’re creating, click the Create a new Program button.

   In either case, the New Program panel displays.

5. Do either of the following:
   • When creating a new training campaign, enter a unique name.
   • From the Campaign drop-down menu, select the existing training campaign you want to schedule.

6. Populate the Start Date field to set the date and time you want to send your Training Campaign.
7. Populate the End Date field to determine when to complete the campaign and finalize reporting.
8. Select recipient targets can be selected from the picker individually or by entering tags.
9. Select the **Send report after this campaign closes** checkbox to schedule a campaign summary report to be sent to email addresses you enter.
Note: Training campaigns are scheduled using Programs and can be created and configured using the Campaigns or Create New Campaign options in the menu.
Sending Campaign Summary Reports

The campaign summary report is a report in PDF format that contains a summary of important details about the campaign run including the following:

- Name of campaign
- Date of campaign
- Key statistics, along with a summary of the campaign templates used

Follow this procedure to send a campaign summary report at the conclusion of a phishing or training campaign.

To send a campaign:

1. Select the **Send a report after this campaign closes** checkbox.
2. Click the **Add** button to determine who will receive the report.
3. To add multiple recipients, clicking the **Add** button again to expand additional recipient settings boxes. This is an optional step.

**Note:** Reports can be sent to any valid email address including distribution lists.

![Email Reports](image-url)
Understanding Email Types

There are two types of email addresses that you can enter:

- **Authorized Domain Address (Admin)** — This is your own address on your company’s or organization’s domain. When you add an Authorized Domain address, you will be sent a validation link to your inbox. Click that link to verify that you are the owner of the email box, and have an account on your company’s/organization’s domain. This will allow you to import target email addresses on that domain.

- **Target Email Addresses (End-Users)** — These are your company’s or organization’s employee’s or member’s email addresses that you will target your simulation toward. These are needed by the simulation in order to deliver the bait email.
To start working with reports, see the following topics:

- Accessing Delivery Reports .......................................................... 162
- Accessing Training Reports .......................................................... 171
- Understanding Report Results ....................................................... 179
- Accessing Security Awareness Training Reports .......................... 182
- Accessing Breach Reports ............................................................. 188
- About Phishing Simulation Reports ............................................... 193
  - Sample Phishing Report Campaign Summary .............................. 193
  - Understanding Email Events ..................................................... 194
  - Sample PDF Summary Report ................................................... 196
Accessing Delivery Reports

Delivery Reports display information about the report such as when the report was created and delivered, as well as statistics reflecting what happened to the campaign or training after it was delivered.

To access a Delivery Report:

1. Log in to the Global console.
   The Global console displays.

2. In the Sites tab, click the Go to Security Awareness Training icon.
   The Security Awareness Training console displays.
3. In the Nav bar, click **Campaigns** to display all programs, campaigns, and simulations regardless of their status.

![Campaign List Panel](image)

The Campaign List panel displays.
Note: You can also click Archives to display only those programs, campaigns, and simulations that have been launched. The Campaign List displays.
4. For the Delivery Report for the campaign you want to view, click the **Simulation Stats** icon.

The Delivery Report panel displays, with the Overview tab active.
5. The Status area displays the following information:
   - Campaign Name
   - Creation Date
   - Launch Date
   - Description
   - Advanced/Options
   - Phishing URL

![Status Area Example](image)

6. The Statistics area displays the following information in a graph format. Hover over the various sections of the graph to display specific information:
   - **Processed** — Requests from your website, application, or mail client via SMTP Relay or the API that the emailer processed.
   - **Clicks** — When a recipient clicks one of the Click Tracked links in your email.
   - **Delivered** — An email that was delivered to a recipient.
   - **Opens** — When an email is opened by a recipient.
   - **Deferred** — The recipient mail server asked the emailer to stop sending emails so quickly.
   - **Drops** — The emailer drops an email when one of the following occurs: The contact on that email is in one of your suppression groups.
• The recipient email previously bounced.
• The recipient has marked your email as spam.

• **Bounces** — When an attempt is made to deliver an email, but the recipient mail server rejects it.
• **Spam Reports** — When a recipient marks your email as spam and their mail server tells us about it.

![Statistics Chart]

7. Additionally, in the Statistics area, you can click any of the following icons to display information differently:

<table>
<thead>
<tr>
<th>ICON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Image" alt="Icon 1" /></td>
<td>Displays the information as a circular bar chart.</td>
</tr>
<tr>
<td><img src="Image" alt="Icon 2" /></td>
<td>Displays the information as a circular bar chart.</td>
</tr>
<tr>
<td>ICON</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Displays the information as a circular graph.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Displays the information as a bar chart.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>Expands the display to fill the panel, or shrinks it back to its original size.</td>
</tr>
</tbody>
</table>

8. Click the **Phishing Line Data** tab.

The Phishing Line Data tab displays. There you can selection actions and filters in real time.
9. Click the Campaign Details tab.

---

Chapter 6: Working With Reports

- 169 -
The Campaign Details tab displays with information about the phishing campaign that was sent.

10. When you’re done reviewing the information, you can do any of the following
    - Export the report into a CSV file — Click the Training Report Card button.
    - Send a reminder to yourself about the training — Click the Send Reminder Now button.
    - Export delivery information into a CSV file — Click the Export Delivery (csv) button.
    - Download a PDF containing report information — Click the Download PDF button.
Accessing Training Reports

Training campaigns include a training invite that is sent to a select number of recipients. Those invited to take a training course would click on a link to launch their training. The Webroot SAT platform tracks the delivery of training invites along with the progress of trainee users as they complete a course.

Training courses can be stopped and re-started picking up where the trainee user left off. Trainee users receive a certificate of completion when a course is complete.

All actions and progress of a trainee user are tracked and logged in Webroot SAT reporting including user invite delivery, trainee user progress and completion. Reporting is available to both summarize training activity and provide detail on a per trainee user level.

**Note:** You can only access a Training Report for a simulation or campaign that has been launched.

To access a Training Report:

1. **Log in to the Global console.**

   The Global console displays.
2. In the Sites tab, click the **Go to Security Awareness Training** icon.

The Security Awareness Training console displays.
3. In the Nav menu, click the **Campaigns** tab.

**Note:** As needed, you can access archived campaigns by clicking the **Archives** tab.

The Campaign List panel displays.
4. For the Training Report for the campaign you want to view, click the **Simulation Stats** icon.

The Delivery Report panel displays.
5. In the upper left, click the **Training Report Card** icon

The Training Reports panel displays.
There are three sections available for your review.
<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Session Report Card</td>
<td>Displays the following information:</td>
</tr>
<tr>
<td></td>
<td>• Training session name</td>
</tr>
<tr>
<td></td>
<td>• Session description</td>
</tr>
<tr>
<td></td>
<td>• Training Module</td>
</tr>
<tr>
<td></td>
<td>• Student count</td>
</tr>
<tr>
<td></td>
<td>• Launch date</td>
</tr>
<tr>
<td></td>
<td>• End date</td>
</tr>
<tr>
<td>Grades</td>
<td>Displays the following information:</td>
</tr>
<tr>
<td></td>
<td>• Attempts - Number of attempts made and the percent of all attempts.</td>
</tr>
<tr>
<td></td>
<td>• Completed - Number of attempts completed and the percent of all attempts.</td>
</tr>
<tr>
<td></td>
<td>• Incomplete - Number of incomplete attempts and the percent of all attempts.</td>
</tr>
<tr>
<td>Individual User Logs</td>
<td>Displays the following information:</td>
</tr>
<tr>
<td></td>
<td>• Timestamp</td>
</tr>
<tr>
<td></td>
<td>• Target</td>
</tr>
<tr>
<td></td>
<td>• Type</td>
</tr>
<tr>
<td></td>
<td>• Name</td>
</tr>
<tr>
<td></td>
<td>• Action</td>
</tr>
<tr>
<td></td>
<td>• Result</td>
</tr>
<tr>
<td></td>
<td>• Score</td>
</tr>
</tbody>
</table>
6. When you’re done reviewing the information, you can do any of the following:
   - Export the report into a CSV file – Click the **Export Training (csv)** button.
   - Export the report about student completion into a CSV file – Click the **Export Student Completion (csv)** button.
   - Export delivery information into a CSV file – Click the **Export Delivery (csv)** button.
   - Download a PDF containing report information – Click the **Download PDF** button.
Understanding Report Results

Webroot Security Awareness Training tracks nearly every event, click, open, score etc. on a user by user basis within each phishing or training campaign. Below are examples of some of the pre-built reports that currently exist within the Webroot Security Awareness Training platform. More reports are being added regularly and custom reports can be requested.

Below is a data legend to help define each item that Webroot SAT tracks within its reports.

<table>
<thead>
<tr>
<th>DATA</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign Count</td>
<td>Total number of campaigns a client launched.</td>
</tr>
<tr>
<td>Phishing (Campaign)</td>
<td>Total number of phishing campaigns a client launched. Phishing campaigns consist of:</td>
</tr>
<tr>
<td></td>
<td>• Simulated phishing lure to entice the user to open/click through to a lure page. For example, a phishing message could be the following: Please log in to your bank verify your credentials.</td>
</tr>
<tr>
<td></td>
<td>• A simulated phishing lure page that entices a user to enter data (credentials/bank info/etc.), or click on a link. For example a simulated phishing lure page would state: Log in to your bank account.</td>
</tr>
<tr>
<td></td>
<td>• An education page, for example: “What to look for to identify phishing attacks…”), training module (hybrid(*1) campaign; example: “Understanding Malware” course) or faux error page (example: “404 not found” to try and get users to think this is a benign/broken link and discard)</td>
</tr>
<tr>
<td></td>
<td>• All actions are logged throughout all these steps.</td>
</tr>
<tr>
<td>DATA</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Training (Campaign)</td>
<td>Total number of training campaigns the client launched. A training campaign consists of:</td>
</tr>
<tr>
<td></td>
<td>• Welcome email for the trainee to access the training material.</td>
</tr>
<tr>
<td></td>
<td>• Course material/interactive training course. (see Courses Available below).</td>
</tr>
<tr>
<td>Hybrid (Campaign)</td>
<td>Total number of hybrid (*1: phishing campaign that ends with a training course session) campaigns the client launched.</td>
</tr>
<tr>
<td>Processed (Emails)</td>
<td>Total number of emails sent to targeted user across all campaigns.</td>
</tr>
<tr>
<td>Delivered (Emails)</td>
<td>Total number of emails delivered to targeted users across all campaigns.</td>
</tr>
<tr>
<td>Deferred (Emails)</td>
<td>Total number of emails deferred by the recipient email systems. Deferrals may end in a dropped, delivered or bounced email message.</td>
</tr>
<tr>
<td>Bounce (Emails)</td>
<td>Total number of emails bounced by the recipient email systems. Bounced messages are generally reported by one of the following:</td>
</tr>
<tr>
<td></td>
<td>• Incorrect email address.</td>
</tr>
<tr>
<td></td>
<td>• Email account/server has blocked the message.</td>
</tr>
<tr>
<td>DATA</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Dropped (Emails)</td>
<td>Total number of email dropped by the recipient email systems. Dropped messages are generally reported on email accounts that received a bounce, and our transactional email system drops the message so that we’re not re-sending to an invalid email address.</td>
</tr>
<tr>
<td>Click (Emails)</td>
<td>Total number of users that clicked on email messages sent across all campaigns.</td>
</tr>
<tr>
<td>Open (Emails)</td>
<td>Total number of users that clicked on email messages sent across all campaigns.</td>
</tr>
<tr>
<td>Lure_visit</td>
<td>Total number of visits by users to simulated phishing lure pages.</td>
</tr>
<tr>
<td>Post</td>
<td>Total number of attempts to post data to a simulated phishing lure page form (login creds, bank info, etc.).</td>
</tr>
<tr>
<td>Education_visit</td>
<td>Total number of visits by users to education pages (infographics/static education page).</td>
</tr>
<tr>
<td>Training_visit</td>
<td>Total number of visits by users to a training course launch page.</td>
</tr>
</tbody>
</table>
Accessing Security Awareness Training Reports

Follow this procedure to access Security Awareness Training reports.

To access a Security Awareness Training report:

1. Log in to the Global console. The Global console displays.

2. Click the Reports tab.

The Reports tab displays.
3. From the Site drop-down menu, select the site you want to run the report for.

4. From the Report drop-down menu, select any of the following reports:
   - SAT: Phishing Clicks
   - SAT: Training Progress
- SAT: Usage Report

5. From the Period drop-down menu, select one of the following date ranges or select a custom date range:
   - Last 7 days
   - Last 30 days
   - Last 60 days
   - This month
   - Last month
Custom range

Note: The Period drop-down menu does not display until you have selected one of the Security Awareness Training reports.
6. When you’re done selecting the date range, click the **Apply** button.

![Date Range Selection](image)

7. When you’re ready to run the report, click the **Submit** button.

![Submit Report](image)

The report displays in the bottom pane, and includes the following columns:
<table>
<thead>
<tr>
<th>REPORT NAME</th>
<th>COLUMNS</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAT: Phishing Clicks Report</td>
<td>• Site</td>
</tr>
<tr>
<td></td>
<td>• Target Email</td>
</tr>
<tr>
<td></td>
<td>• Phishing Campaigns</td>
</tr>
<tr>
<td></td>
<td>• Email Clicks</td>
</tr>
<tr>
<td></td>
<td>• Lure Clicks</td>
</tr>
<tr>
<td>SAT: Training Progress Report</td>
<td>• Site</td>
</tr>
<tr>
<td></td>
<td>• Target Email</td>
</tr>
<tr>
<td></td>
<td>• Training Campaigns</td>
</tr>
<tr>
<td></td>
<td>• Training Progress</td>
</tr>
<tr>
<td>SAT: Usage Report</td>
<td>• Site</td>
</tr>
<tr>
<td></td>
<td>• Target Email</td>
</tr>
<tr>
<td></td>
<td>• Training Campaigns</td>
</tr>
<tr>
<td></td>
<td>• Training Progress</td>
</tr>
</tbody>
</table>
Accessing Breach Reports

The Breach Report and risk assessment tool now allows Security Awareness Training admins to generate a report that outlines breaches associated with any client’s domain. The report includes a breach summary, a list of breached data by category, as well as the users impacted at each client site.

The report provides ideal documentation to help admins determine and demonstrate real world risks so they can advise clients’ executive management on services and tactics accordingly to avoid future security incidents.

Note: With enhanced domain verification to support access to the Breach Report you must use a domain admin level email address such as admin@domain.com or postmaster@domain.com, etc, to view the Breach Report.

To access a Breach report:

1. Log in to the Global console.

The Global console displays.

2. Click the Settings icon.
Chapter 6: Working With Reports

The Security Awareness Training tab displays.

3. Scroll down to the Domain Verification area.

4. In the Add New Domain field, add one of the following two email types to verify access to domains you will be managing:
   - **Domain Member** – You can launch campaigns.
   - **Domain Admin** – You can launch campaign and view breach reports.
5. For the domain you want to view the Breach report for, click **View Breach Report**.

The Breach Report displays, with information about the emails that were breached and the sources of the breach.
6. For additional information, click on the email in question.

Additional information about the breach displays, including the date, the name of the company, and the type of information that was compromised.

7. When you're done, click the Close button.
About Phishing Simulation Reports

Webroot Security Awareness Training includes the ability to create phishing simulation campaigns that mimic a real-world phishing scenario. Webroot uses a transaction email service to track delivery, opens, clicks and data posts for every phishing simulation sent on a per-user basis.

Sample Phishing Report Campaign Summary
Understanding Email Events

You will be able to see data about the following types of email events in the Email Activity Feed:

- **Processed** — Requests from your website, application, or mail client via SMTP Relay or the API that the emailer processed.
- **Clicks** — When a recipient clicks one of the Click Tracked links in your email.
- **Delivered** — An email that was delivered to a recipient.
- **Opens** — When an email is opened by a recipient.
- **Deferred** — The recipient mail server asked the emailer to stop sending emails so quickly.
- **Drops** — The emailer drops an email when one of the following occurs:
  - The contact on that email is in one of your suppression groups.
  - The recipient email previously bounced.
  - The recipient has marked your email as spam.
- **Bounces** — When an attempt is made to deliver an email, but the recipient mail server rejects it.
- **Spam Reports** — When a recipient marks your email as spam and their mail server tells us about it.
The Interactive Phishing Line report allows a user to select actions and filter in real-time.

A summary of the phishing simulation details can be seen within the campaign report.
Reports can be exported to CSV, PDF or screen captured and shared as needed.

Sample PDF Summary Report

The PDF report can be downloaded at any time or set to automatically deliver at the end of a campaign to a pre-set list of recipients.
Chapter 6: Working With Reports

SECURITY AWARENESS TRAINING SUMMARY REPORT

TITLE: Phishing Campaign
LAUNCH DATE: Tue, Nov 7, 2017 11:06 AM -06:00
TARGET USERS: 8

NOTES:
This report shows the results of a phishing campaign run on a select number of users within your organization. These metrics are a one-time snapshot of current susceptibility to this specific phishing campaign.

Raise awareness and decrease risk with ongoing phishing simulations and courses.

Events:

- Delivered: 10
- Open: 5
- Click: 5
- Education Visit: 0

Risk: 63%

TEMPLATE USED: Password Reset Request

LURE EMAIL USED:

NETFLIX

Reset your password

Hi [FIRSTNAME],
Let's reset your password so you can get back to watching.

RESET PASSWORD

If you did not ask to reset your password you may want to review your account access for any unusual activity.

We're here to help if you need it. Visit the Help Center for more info or contact us.

-Your friends at Netflix
To start managing spam filters, see the following topics:

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allowing Email In Microsoft Exchange and Microsoft 365</td>
<td>200</td>
</tr>
<tr>
<td>Allowing Emails In Google G Suite Gmail</td>
<td>213</td>
</tr>
<tr>
<td>Allowing Webroot Training Email Servers</td>
<td>223</td>
</tr>
</tbody>
</table>
Allowing Email In Microsoft Exchange and Microsoft 365

If you use Microsoft Exchange or Microsoft 365, you need to allow the IP address for the mail server that Webroot Security Awareness Training uses to send email messages to targets.

**Webroot IP address and Mail Server**

- Sending email server IP address – 167.89.85.54
- Sending email server name – o1.relay.mx-secure.com

Here are the parts involved with allowing email in Microsoft Exchange and Microsoft 365:

**Part 1:** Create an IP Allow List with Webroot’s email server IP address.

**Part 2:** Set up a mail flow rule to bypass spam filtering and the Clutter folder.

**Part 3:** [Microsoft 365 only] Set up a rule to bypass the Junk Folder.

**Part 4:** Testing.

**Note:** We recommend waiting 1 to 2 hours before testing to allow the settings to propagate across your environment. You can use a small phishing campaign to test that inbound email is working properly. Please see *Creating Phishing Simulations on page 48* for help setting up a campaign.

**Part 1: Creating an IP Allow List with Webroot’s email server IP address:**

This step enables Webroot’s email server to be allowed to deliver mail inbound to your Exchange or Microsoft 365 server.

1. Navigate to your Exchange admin center (EAC) by signing into Microsoft 365 using your account, and then choose the Admin tile.
2. You are now in the Microsoft 365 admin center. Use the left navigation list to choose **Admin centers > Exchange.**
Install the Office desktop apps

User management

Add, edit, and remove user accounts, and reset passwords.
3. In the **Exchange admin center (EAC)**, navigate to Protection > Connection filter.
4. Double-click the **Default** policy to start editing it.

5. Click the **Connection filtering** menu item and then create an IP Allow list with Webroot’s sender email IP address:
   - Under the **IP Allow list**, click on the click the **Add icon** (+).
   - In the dialog box, use Webroot’s IP address:
     - **167.89.85.54**

6. Click **OK**, then **Save** to complete part 1.

**Part 2: Setting up a mail flow rule to bypass spam filtering and the Clutter folder**
In part 2, you will set up a mail flow rule (AKA transport rule) to ensure Webroot’s training email messages will bypass your Clutter folder as well as any spam filtering enabled, for both Microsoft Exchange and Microsoft 365.

1. Open the Exchange admin center (EAC). See Part 1, Step 1 above for help if needed.
2. In the EAC, go to mail flow > rules, click the Add icon (+) > Bypass spam filtering....
3. Provide a **Name** and add conditions for the new rule.

4. Add the condition **Apply this rule if…**
   - Select **The Sender**, then click on **More Options** and select **IP address is in any of these ranges or exactly matches**. Specify **167.89.85.54** as the IP address, then click OK.
5. Beneath **Do the following**, click **Modify the message properties** then **Set a Message Header**.
6. Click the *Enter text…* button to set the message header to the value below. Click OK to continue.
   - X-MS-Exchange-Organization-BypassClutter to the value true

   **Note:** Both values are case sensitive.

7. Add an additional action beneath **Do the following** to **Modify the message properties**. Here, select **Set the spam confidence level (SCL)**
8. Select **Bypass Spam Filtering**.
9. Review the settings and once verified, click **Save** to proceed and complete the process.

**Part 3: [Microsoft 365 ONLY] Creating a rule to bypass the Junk Folder for M365 mail servers**

**Note:** If you are using Microsoft 365, follow these steps, otherwise ignore them and move to **Part 4: Testing**.

This rule will allow Webroot training and simulated phishing emails to bypass the Junk folder, ensuring that your users are getting tested on their security awareness.
1. Open the Exchange admin center (EAC). See Part 1, Step 1 above for help if needed.
2. In the EAC, go to mail flow > rules, click the Add icon (+), then Bypass spam filtering...
3. Provide a **Name** and add conditions for the new rule.

![Image of rule configuration]

4. The **Name** provided for this rule is **Webroot Skip Junk Filtering**, feel free to use whatever name you like.

5. Click **More options**.

6. Add the condition **Apply this rule if**...
   - Select **The Sender**, then click on **More Options** and select **IP address is in any of these ranges or exactly matches**. Specify **167.89.85.54** as the IP address, then click **OK**.

7. Beneath **Do the following**, click **Modify the message properties** then **Set a Message Header**.
   - Set the message header "**X-Forefront-Antispam-Report**" to the value "**SFV:SKI;**".

8. Beneath **Properties of this rule** set the priority to directly follow the rule created in Part 2 to bypass spam filtering, click **Save** to complete the process.

9. You have now completed the process to allow email for Microsoft Exchange/Microsoft 365.

**Part 4: Testing**

Webroot recommends a test campaign be executed to test that mail is flowing properly and inbound email is working as expected. Please allow 1-2 hours for settings to replicate, it may take a little longer for M365.
Allowing Emails In Google G Suite Gmail

In order to prevent or resolve problems related to mail delivery when using Webroot Security Awareness Training with G Suite Gmail, the sending IP address for Webroot’s Security Training needs to be allowed. You will also need to add a rule that allows messages containing a special header. The steps provided allow the emails to skip the spam folder and disables the warning banners Gmail posts when encountering potentially dangerous messages, helping campaigns to be more realistic and effective.

Webroot IP address and Mail Server

- Sending email server IP address – 167.89.85.54

There are four parts involved with allowing email in G Suite Gmail:

Part 1: Add Webroot’s sender IP address to Gmail’s email whitelist.

Part 2: Add Webroot’s IP address as an Inbound Gateway.

Part 3: Create a rule for messages containing a special header to bypass the spam filter.

Part 4: Testing.

Part 1: Adding Webroot’s sender IP address to Gmail’s email whitelist

1. Log in to your Google Admin console using an administrative account. From the Admin console home page, select Apps.
2. Select G Suite.

3. Select Gmail.

4. Select Advanced Settings.
   Tip: To see Advanced settings, scroll to the bottom of the Gmail page.
5. On the left, if you have the choice, select the top-level organization, typically your domain.
6. In the Spam, phishing and malware section, scroll to the Email whitelist setting, or in the search field, enter 'email whitelist'. In the Email whitelist section, enter the Webroot IP address:
   - 167.89.85.54
7. At the bottom of the page, click Save to complete Part 1.

Part 2: Adding Webroot’s IP address as an Inbound Gateway
1. Log in to your **Google Admin console**.
2. As in part 1, open the **Advanced Settings** screen.
   - Apps > G Suite > Gmail > Advanced Settings
3. Under **General Settings**, if you have it, select your top-level organization on the left.
4. Scroll down to the **Inbound Gateway** setting located under the **Spam** section. Hover over the setting and click **Configure** to create a new setting or click **Edit** to edit an existing one.
5. Configure the Inbound gateway to match the settings displayed in the screenshot below.

In case the screenshot cannot be downloaded or viewed for any reason, the settings and checkboxes should be configured to match these settings:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gateway IP</td>
<td>167.89.85.54</td>
</tr>
<tr>
<td>Automatically detect external IP (recommended) checkbox</td>
<td>UNCHECKED</td>
</tr>
<tr>
<td>Reject all mail not from gateway IPs checkbox</td>
<td>UNCHECKED</td>
</tr>
</tbody>
</table>
Require TLS for connections from the email gateways listed above checkbox | UNCHECKED
Message is considered spam if the following header regexp matches checkbox | UNCHECKED

6. Click Add Settings or Save to complete the process.
7. You have completed Step 2 to allow messages sent by Webroot’s Security Awareness Training email servers.

Part 3: Creating the rule to bypass the spam filter

1. Scroll down to the Content Compliance setting located under the Compliance section. Hover over the setting and click Configure to create a new setting or click Edit to edit an existing one.

2. Configure the settings to create the Content Compliance rule as follows:
   1. In the list of Email messages to affect, check the box for Inbound.
   2. Add an expression with the following values:
      - If ANY of the following match the message.
      - Advanced content match.
- Chapter 7: Managing Spam Filters -

- **Location**: Full headers.
- **Match type**: Contains text.
- **Content**: X-PHISHTEST.

3. Click **Save** to save the expression then **Add Setting**.

4. For the **If the above expressions match, do the following** setting:
   - Under **Spam** check the box to enable the setting **Bypass spam filter for this message**.

5. Click **Add Setting** to complete the configuration.
6. In the lower right corner of the Advanced Settings page, click Save to finish the process and save the settings just configured.
### Add setting

#### Content compliance

Webroot Security Awareness Training Whitelist

<table>
<thead>
<tr>
<th>1. Email messages to affect</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inbound</strong> 🟢</td>
</tr>
<tr>
<td>Outbound</td>
</tr>
<tr>
<td>Internal - sending</td>
</tr>
<tr>
<td>Internal - receiving</td>
</tr>
</tbody>
</table>

#### 2. Add expressions that describe the content you want to search for in each message

**If ANY of the following match the message**

<table>
<thead>
<tr>
<th>Expressions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced content match</td>
</tr>
</tbody>
</table>

**Location**

| Full headers |

**Match type**

| Contains text |

**Content**

| X-PHISHTEST |

[Save]  [Cancel]

#### 3. If the above expressions match, do the following

**Modify message**

<table>
<thead>
<tr>
<th>Headers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add X-Gm-Original-To header</td>
</tr>
<tr>
<td>Add X-Gm-Spam and X-Gm-Phishy headers</td>
</tr>
<tr>
<td>Add custom headers</td>
</tr>
</tbody>
</table>
3. You have completed the steps to allow messages sent by Webroot’s Security Awareness Training.

**Part 4: Testing the changes**

You can use a test phishing campaign to yourself or a small group to ensure inbound email is working properly. If it doesn’t work at first, wait an hour to allow the settings to propagate to all users.
Allowing Webroot Training Email Servers

Webroot Security Awareness Training uses email to deliver welcome messages, training invitations and phishing simulation messages. For the service to function properly, email delivery must work in a timely and dependable manner.

Occasionally, before email is allowed to be delivered, some domains will require that the sending mail server be allowed. This action places the sending mail server on a safe list and allows mail from its IP address or server name to be accepted. The steps required to create entries varies from email platform to email platform.

If you are having problems with mail getting stopped by your mail server as spam, add allow entries for the Security Awareness Training email sending mail server:

- IP address: 167.89.85.54
- Mail Server name: 01.relay.mx-secure.com
Chapter 8: Working With Settings

To start working with Settings, see the following topics:

Verifying Domains ................................................................. 225
Importing Targets ............................................................... 229
Integrating with Microsoft Azure Active Directory ...................... 237
Microsoft Azure Active Directory Frequently Asked Questions ..................... 245
Verifying Domains

You must verify a domain before you can send phishing simulations to users in that domain.

To verify a domain:

1. Log in to the Global console.

   The Sites tab displays.

2. Click the Go to the Security Awareness Training Console icon.

   The Security Awareness Training dashboard displays.
3. In the Nav bar, click **Settings > Domains**.

![Image of Webroot interface with Domains highlighted]

The Domains pane displays.
4. In the Add new domain field, enter a domain you want to verify and click the Add Domain button.

**Note:** Public domains such as yahoo.com and gmail.com are not permitted.

The system does indicate the domain that is being added and the email address where the verification will be sent.
5. When you receive the verification email, click the link and log into the Global console again.
Importing Targets

Follow this procedure to import targets for your phishing or training campaigns.

To import a target:

1. Log in to the Global console.
   
   The Sites tab displays.

2. Click the Go to the Security Awareness Training Console icon.
   
   The Security Awareness Training dashboard displays.
3. In the Nav bar, click **Settings > Targets**.

The Target Data panel displays.
4. Click the **Import Targets** button.

The Import Targets window displays.
### Import Targets (verified domains only)

**Import Method**
- Enter Targets Manually
- Upload Targets

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
<th>Employee ID</th>
<th>Tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Last Name</td>
<td>Email</td>
<td>Company User ID</td>
<td>Add/Select Tags...</td>
</tr>
</tbody>
</table>

- or -

Enter one target per line (with optional headers)

```
firstName,lastName,email,tags,companyUserId
```

![Import button](Image)
5. Do any of the following:
   - To enter targets manually, one by one, populate the fields and click the **Add Target** button.

   ![Import Targets](image)

   **Note:** You can create Tags on the fly by populating the Tags field.

   - To enter a few targets, in the Enter one target per line field, enter the target's information, and click the **Import** button.
To upload a spreadsheet with target information, click the **Upload Targets** radio button, then browse for the CSV file that contains the information you want to upload, then click the **Done** button.
Chapter 8: Working With Settings

Import Targets (verified domains only)

Import Method
- Enter Targets Manually
- Upload Targets

The CSV import format has been updated. Please use the new format, or download the new CSV template.

- Supported file formats:
  - CSV:
    - Use the supplied CSV template for .csv data
  - LDIF (LDAP/Active Directory export):
    - .ldif file extension
    - Fields:
      - givenname: user's first name (required)
      - sn: user's last name (required)
      - mail: user's email (required)
      - objectGUID: your internal unique user ID (optional)
      - ou: (organizational units) will be treated as "tags" (optional)
  - 15,000 records maximum file size. If your file is larger, either split import files into multiple files, or contact support for assistance.
  - FirstName, LastName, Email are required field. Any additional fields on each target will be imported as a tag.
  - Please allow a few minutes to process large files.
6. When you're done importing targets, click the **Done** button.
Integrating with Microsoft Azure Active Directory

You can integrate Webroot Security Awareness Training (WSAT) with Microsoft Azure Active Directory (Azure AD). When you integrate WSAT with Azure AD, you can:

- Control in Azure AD what users and groups should be synced with WSAT to serve as targets for campaigns.
- Enable your list of available targets in WSAT to be automatically updated as users are added, updated, or removed in Azure AD.

To get started with the integration, you will need:

- A Microsoft Azure AD subscription. If you don't have a subscription, you can get a free account.
- A Webroot management console (that manages multiple sites) with WSAT enabled for at least one of your sites.

There are two parts to completing the integration. Part 1 involves adding Webroot Security Awareness Training from the gallery to your list of managed SaaS apps. Part 2 involves obtaining and entering the secret token, selecting which users to sync with WSAT and confirming users were imported properly.

Part 1: Add Webroot Security Awareness Training from the gallery to the list of managed SaaS apps

1. Sign in to the Azure portal using either a work or school account, or a personal Microsoft account.
2. On the left navigation pane, select the Azure Active Directory service.
3. Navigate to Enterprise Applications and select All Applications.
4. To add a new application, select New application.
5. In the Add from the gallery section, type Webroot Security Awareness Training in the search box.
6. Select Webroot Security Awareness Training from the results panel and then add the app. Wait a few seconds while the app is added to your tenant.

Part 2: Configure Azure AD integration

To complete the WSAT integration with Azure AD, you will perform the following steps:

1. Obtain a Secret Token.
2. Select users in Azure AD that you want to sync with WSAT.
3. Enter the Secret Token in the Azure portal.
4. Confirm users were imported.

Step 1: Obtain a Secret Token

To connect your site to Azure AD you will need to obtain a Secret Token for that site in the Webroot management console.

1. Sign into your Webroot management console.
2. The Security Awareness Training settings page is accessed differently depending on the type of Webroot Management console you are using.
   a. For the multi-site Webroot Management console - From the Sites tab, click the gear icon under the Security Awareness Training column for the site you wish to connect with Azure AD.
   b. For the single site Webroot Management console - In the top navigation bar, click Security Awareness Training to open the Security Awareness Training settings page.
3. Click the **Configure Azure AD Integration** button.

4. Copy the **Secret Token**.
Step 2: Select users in Azure AD that you want to sync with WSAT

1. In the Azure portal, on the Webroot Security Awareness Training application integration page, find the Users and groups section.

2. From here you can select users and groups that should be synced with WSAT.

   ![Users and groups section in Azure portal](image)

   **Note:** You can optionally skip this step and choose to Sync all users and groups as your Scope in the Provisioning section. However, we recommend syncing specific groups, or creating a group in Azure AD to capture all the users you want to target for training. This helps to prevent the accidental inclusion of guests and external collaborators, if you have them in your directory.

Step 3: Enter the Secret Token in the Azure portal

1. In the Azure portal, on the Webroot Security Awareness Training application integration page, find the Provisioning section.
2. Click **Get started**

![Get started button](image)

Automate identity lifecycle management with Azure Active Directory
Automatically create, update, and delete accounts when users join, leave, and move within your organization. Learn more.

3. Change **Provisioning Mode** to **Automatic** and click **Save**.

![Provisioning settings](image)

4. Paste the **Secret Token** you copied from the Webroot management console into the **Secret Token** field. Enter the **Tenant URL** as [https://awarenessapi.webrootanywhere.com/api/v2/scim](https://awarenessapi.webrootanywhere.com/api/v2/scim)
Click the **Test Connection** button and then click **Save**.

5. Change **Provisioning Status** to **On**.

6. Click **Save** to initiate the sync between Azure AD and WSAT.

**Step 4: Confirm users were imported**

Depending on the size of your directory, it could take several minutes to complete the initial sync.
In the Webroot management console, the **Security Awareness Training** settings page for your site shows the status of the Active Directory Integration as **Sync Pending** or **Sync Enabled**.

- **Sync Pending** – connection has yet to be established and is not ready for use.
- **Sync Enabled** – connection is established and data has been obtained, a timestamp will be shown indicating the last time an update was completed.

![Webroot SecureAnywhere console](image)

To see the users that were imported:

1. In the **Webroot management console**, click the **Go To Security Awareness Console** icon to open the Security Awareness console.
2. In the left navigation menu of the Security Awareness console, click Targets. Users created using the integration will display the Tag AD User.

After the initial sync, Azure AD will continue to make updates to target users in WSAT as often as every 40 minutes (if there have been any changes to the users and groups you selected to be synced).
Microsoft Azure Active Directory Frequently Asked Questions

You can integrate Webroot Security Awareness Training (WSAT) with Microsoft Azure Active Directory (Azure AD). When you integrate WSAT with Azure AD, you can:

- Control in Azure AD what users and groups should be synced with WSAT to serve as targets for campaigns.
- Enable your list of available targets in WSAT to be automatically updated as users are added, updated, or removed in Azure AD.

This topic includes a number of frequently asked questions and is helpful to review if you plan to use the integration.

**How do I disable the Active Directory integration?**
From the Security Awareness Training settings page there is a button to Disable the integration. Doing this will delete all Active Directory target users from WSAT and stop all further updates from Active Directory. Once you have disabled the integration here, please go to the Webroot Security Awareness Training application in the Azure portal and switch Provisioning Status to Off.

**What happens when there is a conflict and a user that already exists is created by the Active Directory integration?**
An existing target user with the same email address as a user that is imported from Active Directory will become managed by Active Directory. The target user’s campaign history will remain intact. However, you will no longer be able to manually delete the user and would have to delete it from Active Directory.

**How do I switch the sync mode between 'Sync all users' and 'Sync only assigned users and groups'?**
First, disable the integration (see Disabling Active Integration above), then re-enable it with the new setting in the Azure portal. Making this change without disabling and re-enabling the integration will not have any effect on the users and groups already synced.

**What do I do if users are not getting synced?**
Make sure all users have Office 365 email accounts associated with their profiles. Also see Switching between 'Sync all users' and 'Sync only assigned users and groups' above. If problems persist, open a ticket with Webroot Support for assistance.
Chapter 9: Accessing Usage Data

For information about accessing usage data for Security Awareness Training, see the following topic:

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About Accessing Usage Data

With the usage console that includes detailed breakdowns of your Webroot products and services, you can now access your usage data for Security Awareness Training.

For more information, see the Accessing Usage Data topic in the Working With Settings section of the GSM Admin Guide.
Chapter 10: Security Awareness Training Technical Support

For information about support, see the following topics:

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- Leaving Feedback .............................................................................. 251
Accessing Technical Support

Webroot offers a variety of support options.

To access technical support:

1. In the Tab menu, click the Support tab.

The Support panel displays.
2. From there, you can do any of the following:
   - Look for the answer in our online documentation.
   - Connect to the Webroot Online Business Forum.
   - Enter a help ticket.
Leaving Feedback

If you’d like to leave feedback, we’d love to hear from you!

**To leave feedback:**

1. In the Tab menu, click the Feedback tab.

The Webroot Security Awareness Training survey displays.
1. What is your overall satisfaction with Webroot Security Awareness Training?

2. Respond to the questions.

3. When you’re done, click the Done button.
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