proofpoint.

Security Awareness Training

BUSINESS INTELLIGENCE
Administrator Guide

June 2020

Table of Contents

REPORTING OVERVIEW

The data analytics engine enables you to customize report views to meet your specific needs. Data is clearly visible and easy to manipulate so that you can quickly view relevant data points. Advanced filtering options make the data responsive to changes in your analytical needs.

Report dashboards contain large, easy to read Key Performance Indicators (KPI), tables, graphs, and charts so that you can instantly view critical data analytics.

Tables contain filtering and searching capabilities, including filtering by your customer properties. They can be customized to display or hide data columns to reflect only the information that you need to see, yet you have the flexibility to change column selections at any time to instantly view other data points.

Charts can also be used to filter data by selecting parts of the chart, and the information will update immediately.

You can save frequently generated reports by creating custom report views. Then, you can schedule reports to be sent to others by using the Scheduled Exports function.

If you need to download data from charts and tables, you can export it to Excel and CSV file formats.

NAVIGATING THE REPORT DASHBOARD

The reporting dashboard contains a wide variety of data analytics and filters.

Each boxed area on the page is called a "tile." These tiles change dynamically based on the selected filtering options. For example, in the sample report below, Campaign Performance, Failure Trend and Reported Emails are examples of tiles.

Some reports contain tabs where you can view additional tables, graphs, and data points.

Report Refresh Rate

Business Intelligence reports are updated twice daily as shown below.

Refresh Times (Twice Daily)		
US (New York)	AP (Sydney)	EU (Dublin)
3:00 a.m. Local (8:00 a.m. UTC)	3:00 a.m. Local (4:00 p.m. UTC)	3:00 a.m. Local (3:00 a.m. UTC)
and	*and*	*and*
9:00 p.m. Local (2:00 a.m. UTC)	9:00 p.m. Local (10:00 a.m. UTC)	9:00 p.m. Local (9:00 p.m. UTC)

To find out the date and time the report began its last refresh, look under the report description at the top of the report. Times are rounded and approximate.

Training Assignment Performance

Review detailed user and assignment scores, progress, and completion rates across training assignments and modules.

Data updated twice a day. Last update: 2020-Apr-08 at 16:04 (UTC) (approximately 40 minutes ago)

Time Range	Display Text
0 seconds to 44 seconds	approximately a few seconds ago
45 seconds to 89 seconds	approximately a minute ago
90 seconds to 44 minutes	approximately 2 minutes ago…44 minutes ago
45 minutes to 89 minutes	approximately an hour ago
90 minutes to 21 hours	approximately 2 hours ago … 21 hours ago
22 hours to 35 hours	approximately a day ago
36 hours to 48 hours	approximately 2 days ago

Filtering Data

Filters Selected

The bar at the top of the report displays a horizontal list of the individual report filters that are currently active (selected). Use the left and right arrows, if available, to view a lengthy list of filters. The report data changes dynamically based on the filters selected or removed.
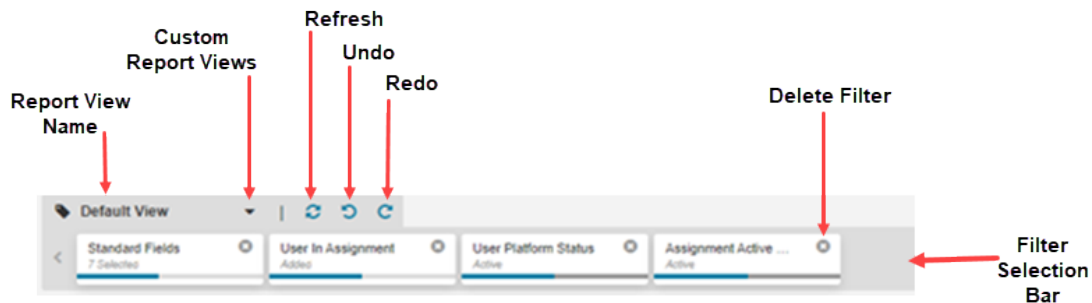

The options available in the filter selection bar area include:

- **Custom Report Views** – Click the Custom Report Views **down arrow** to create a new custom report view. See Creating a Custom Report View for more information on how to create custom views. **Note:** The Default View only includes active users in the system.

- **Refresh** – Click the refresh ⟳ button to reload the page using the selected filters.

- **Undo** – Click the undo ↺ button to reverse the last action(s).

- **Redo** – Click the redo ↻ button to reverse the undo action(s).

- **Delete Filter** – Click the circled X in the upper right corner of the filter box to delete a filtering option. **Note:** The "Standard Fields" filter cannot be permanently deleted. It will reappear the next time the Default View is displayed.

Using the Filters

The filters that are available for this report display in the leftmost tile. Each filter type contains corresponding filtering options. All the tiles on the page change based on the filters selected.
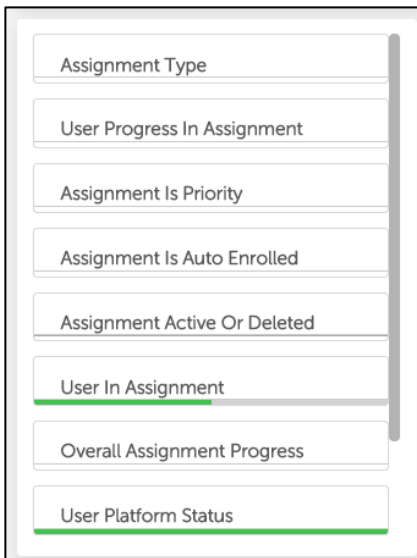
- **Green bar line** – The green bar below a filter title is a visual indicator that option(s) were selected for that filter. The length of the green bar is a visual indicator of the percent of available options that are selected for that particular filter. For example, a full-length green bar indicates all of the options for that filter have been selected.

- **White background** – The white bar below a filter title Indicates no options were selected for that filter.

When you click a filter type in the list, a pop-up window displays the options available.
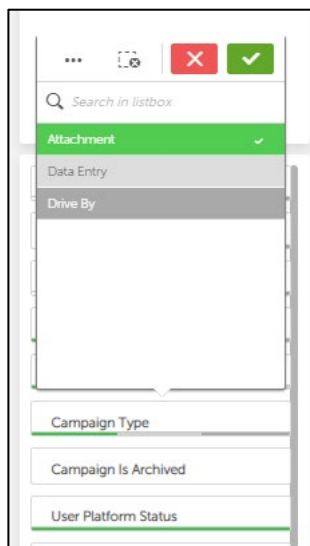
- **Green background & white checkmark** – Active selected filtering option.
- **White background** – Related to the active selection.
- **Light Gray background** – Not an active filtering selection.
- **Dark Gray background** – Available filtering option that will not alter the report if chosen.
- **Clear button** – Click to clear all selected options.
- **Red X button** – Click to close the box without saving selected options.
- **Green Checkmark button** – Click to confirm and save selected options before exiting the window.

Using the Calendar Date Selectors

Each report contains calendar date selectors that display below the filter selection bar. Use them to select a date range for reports.

1. Click the **Select date range** field.
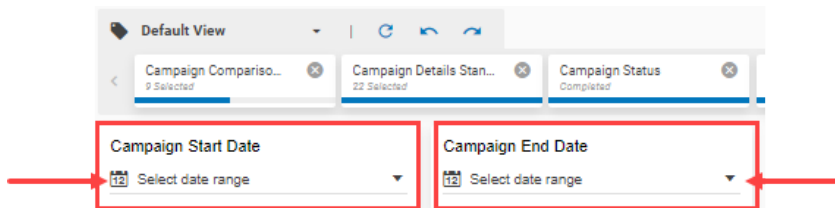
2. Do one of the following:

   - Click the date or dates in the calendar to use for the range. The available dates display in bold text.

   - Click one of the available pre-defined options under "Select" to the right of the calendar, such as Today, Yesterday, Last 7 days, and so forth. The available options are highlighted in dark gray.
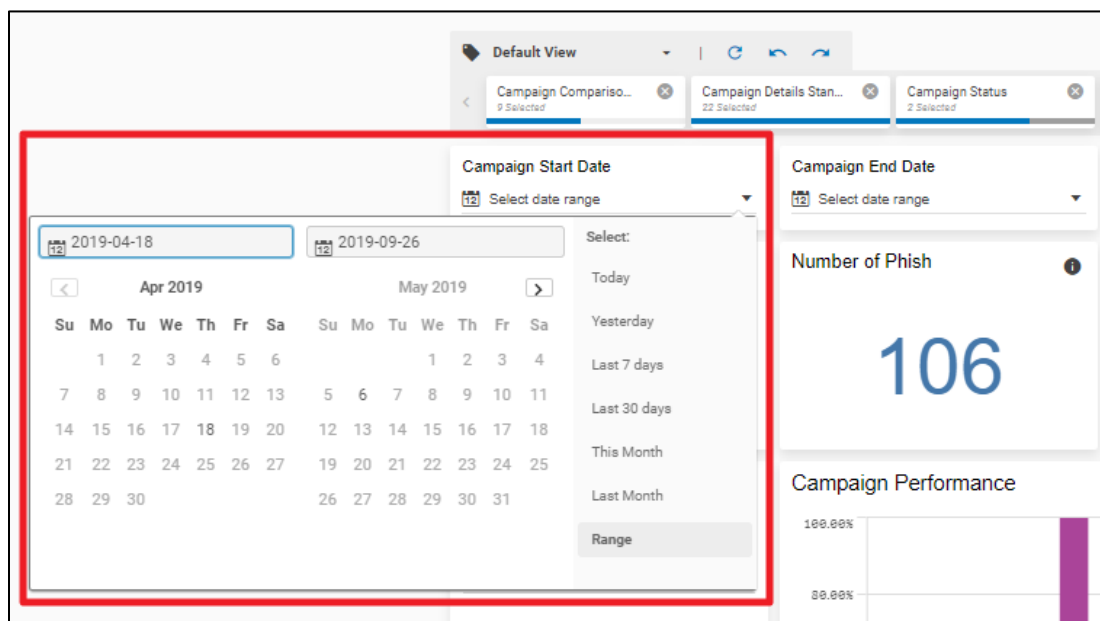
The report data changes dynamically based on the selected dates.

KPI Boxes

Relevant Key Performance Indicators (KPI) are displayed prominently on the report page, typically at the top. Each KPI value reflects the currently selected filters. They will change whenever different filtering criteria is used. Hover over the circled "i" icon view each KPI definition.
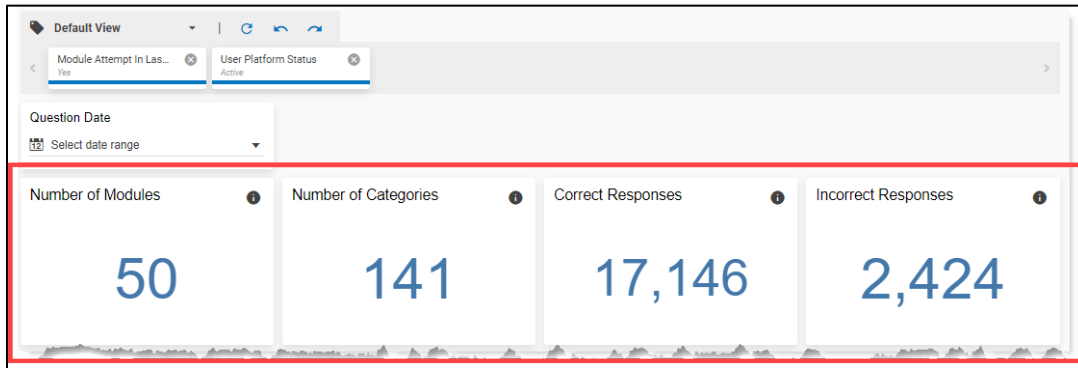

Table Navigation

Use the information below to learn how to use tables.

Action	Icon	Description
Scroll Bars	--	Hover your mouse over the bottom or right side of the table to display gray horizontal or vertical scroll bars to use for scrolling through and viewing more data in either direction.

| Action	Icon	Description
Sorting Column Data	▲	Click the column heading to sort it in ascending or descending order. A small arrow points up for ascending order or down for descending order.
Moving Columns	--	Click the column heading to move, drag it to the desired location in the table, and release the mouse button.
Searching Data	🔍	Click the **magnifying glass** icon to display a pop-up list of available search items. From the list, click one or more options, then click the green checkmark ✅ button. For example, you can drill-down to view only data from one area, such as a specific Department or Assignment Name.
Adding Standard Fields and Custom Properties	⊞	Click the **Selector** icon to view a pop-up list of available columns (fields) and properties for display. From the list, click to select (show) or deselect (hide) columns. • **Green background & white checkmark** – Active selected column (field) to display in the table. • **Gray background** – Unselected column (field) that is not currently displayed in the table. • **Clear button** ⌞⊗ – Click to clear all selected options. • **Red X button** ❌ – Click to clear any recent selections made. • **Green Checkmark button** ✅ – Click to save selected options before exiting the window. *Tip:* You can also click outside the box to save your selections.
Downloading Data	☁	Click the **Download** icon to display a pop-up window with the options to export data to XLSX (.xlsx) or CSV (.csv). Once the option is selected, the file format is automatically downloaded to your local drive. Refer to Downloading Data for steps on how to download report data.

Donut Graph Navigation

The data displayed in the donut graph will change based on the filtering selected. When you click on a portion of the donut graph, all the associated data and graphics are updated immediately.

You can do the following with the donut graph:

- Hover over a section to view more details.

- Click to select or deselect on one or more sections to focus the report only on the selected areas, then click the green checkmark ✅ button to save the selections. The report data will update to reflect the filters selected.

- Hold the mouse cursor down on a section of the graph to spin it clockwise or counterclockwise.
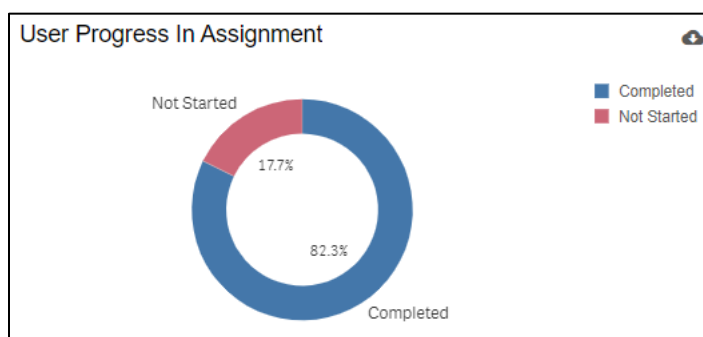
Bar Chart Navigation

You can do the following with the bar chart:

- Hover over a bar to view more details.

- Use the right scroll bar to scroll up and down through the bars in the chart.
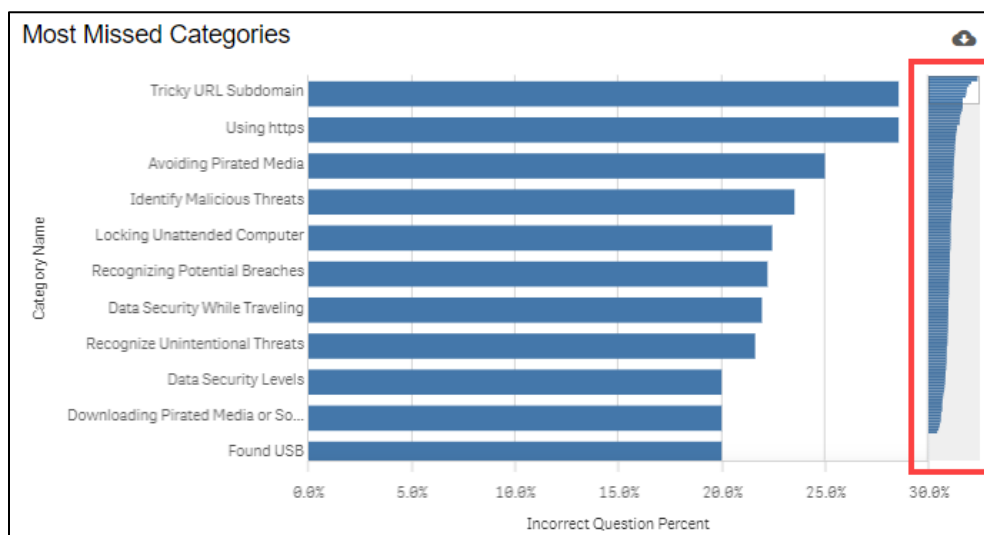
- Click to select or deselect one or more bars to focus the report only on the selected areas, then click the green checkmark ✅ button to save the selections. The report data will update to reflect the filters selected.
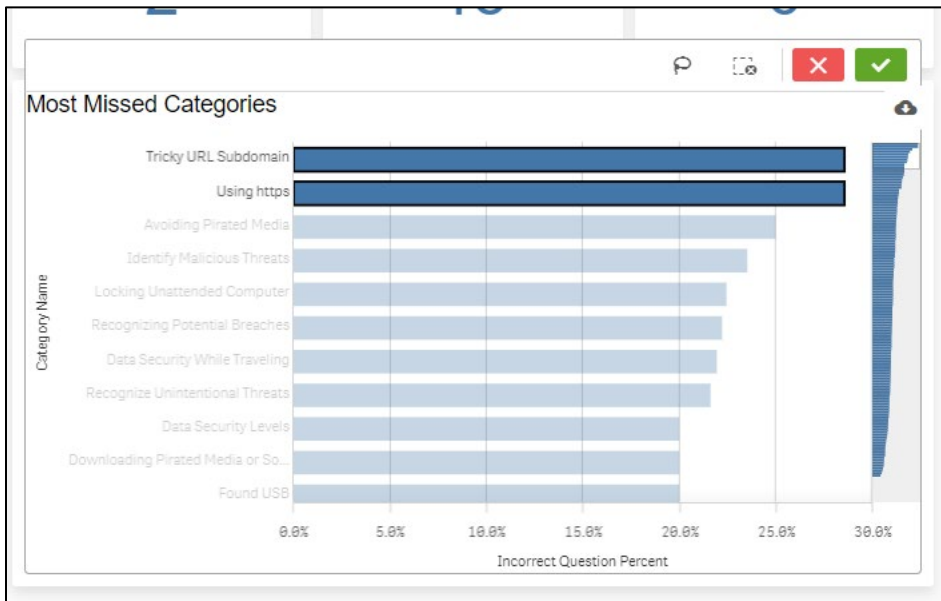
Benchmarking

The Benchmark tile enables you to compare your organization's performance data against the same or other industries, other Proofpoint customers, and the organization itself over time to gauge results and develop an action plan to improve or maintain a competitive edge.

The highlighted areas are used for benchmarking.
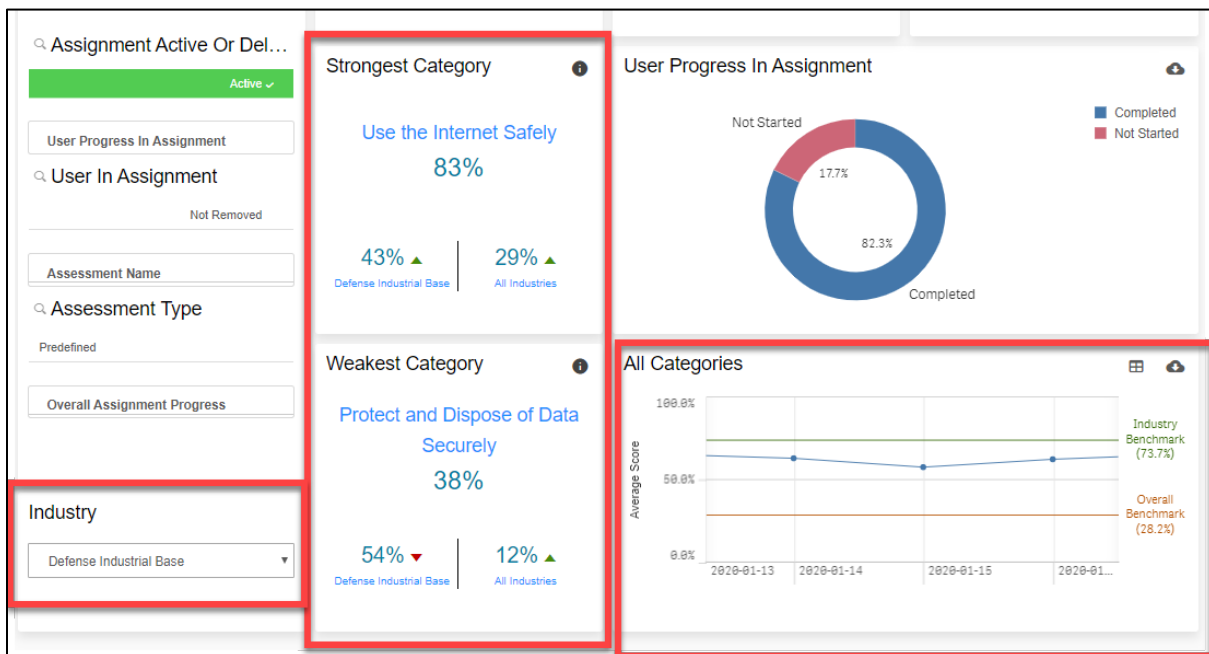
To compare your organization to a specific industry, select it from the **Industry** drop-down list.

The **Strongest Category** and **Weakest Category** tiles update automatically based on the industry you selected. The **All Categories** tile also changes.
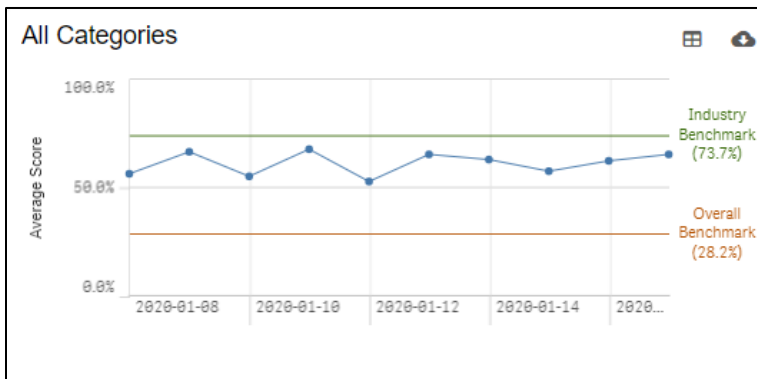
Item	Icon	Description
Your Organization	--	The blue dotted line represents your organization's scores. Hover over the dots to see details.
Industry Benchmark	--	The green line represents the benchmark score of customers in the industry that you selected.
Overall Benchmark	--	The orange line represents the overall benchmark average of all customers regardless of industry.
Threat Category Selector	⊞	Click the threat category selector icon to view a pop-up list of threat categories. Select one category from the list or choose All Categories to include them all in the benchmark tile.
Downloading Data	☁	Click the **Download** icon to display a pop-up window with the options to export to XLSX (.xlsx) or CSV (.csv). Once the option is selected, the file format is automatically downloaded to your local drive. Refer to Downloading Data for steps on how to export report data.

Lasso Tool

The lasso tool enables you to encircle data points to focus on.

1. Click inside the tile to view the **lasso** ⌕ icon.
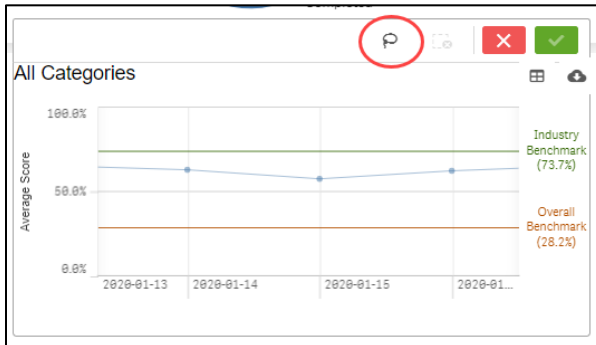
2. Use the mouse to draw a free-hand circle around the desired data points, then click the green checkmark ✔ button to confirm the selection. The report will update to reflect only the data pertaining to the information that you lassoed.

DOWNLOADING DATA

You can download table or chart data to Excel (.xlsx) or CSV (.csv) file format.

1. In the right corner of a table or chart, click the **Download** ☁ icon.

2. From the pop-up window, choose the type of export file to create:

   - **Export XLSX** – export data to a Microsoft Excel (.xlsx) file.

   - **Export CSV** – export data to comma-separated values (.csv) text file.

3. When the export file type is selected, the system automatically downloads the file to your local drive.

WORKING WITH CUSTOM REPORT VIEWS

You can create customized report views to save reporting criteria so that report generation is quick, easy, focused, and consistent.

Creating a Custom Report View

Any custom report views created are only available and unique to the person who created it. They are not accessible by others in the organization.

1. Navigate to the product report for which you want to create a custom report view. For example, you may want to create a custom report view for the Training Assignment Performance report.

2. Use the filters to create and display the desired reporting and table information.

3. Click the **down arrow** next to Default View.
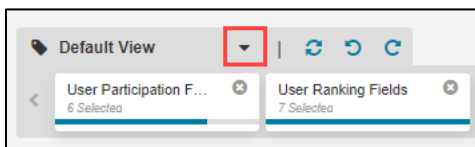
4. Click **+ CREATE VIEW**.
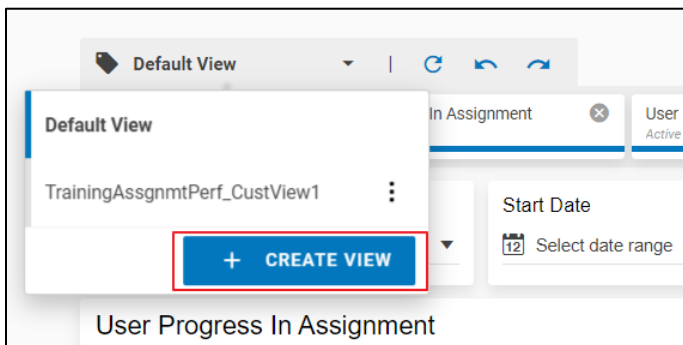
5. Enter a name for the report view in the **View Name** field.
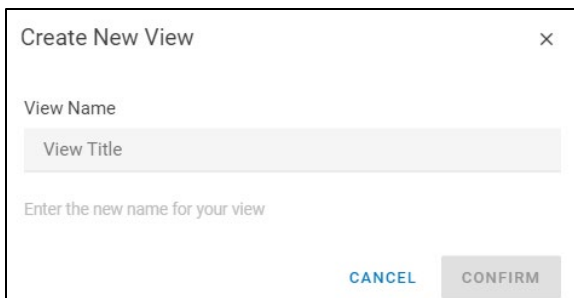
6. Click **CONFIRM**. The newly added report view displays in the view list.

Renaming a Custom Report View

Use the steps below to rename a custom report view.

> **Note:** If you need to change the reporting criteria for an existing custom report, you must create a new report with the new criteria.

1. Navigate to the report to be renamed.

2. Click the **down arrow** next to Default View.
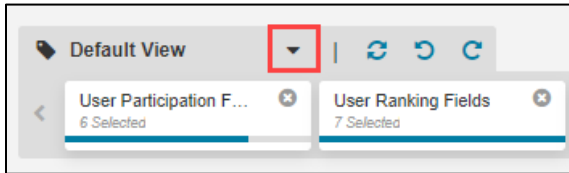
3. Hover your cursor over the **three vertical dots** and click the **RENAME** option.
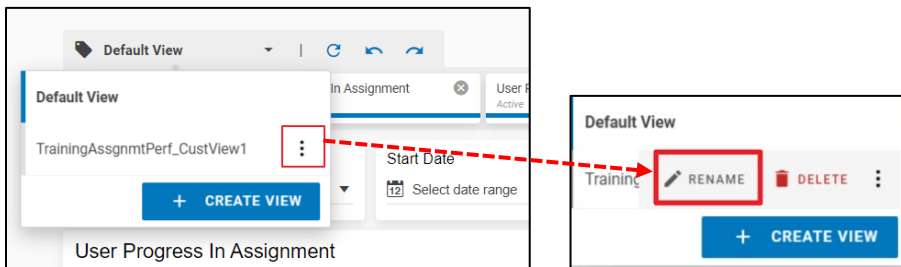
4. Type the new name for the report in the **View Name** field.
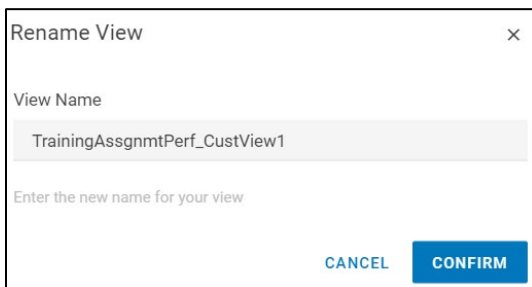
5. Click **CONFIRM**. The new report name displays in your list.

Deleting a Custom Report View

Use the steps below to delete a report view from your custom view list.

1. Navigate to the report to be deleted.

2. Click the **down arrow** next to Default View.
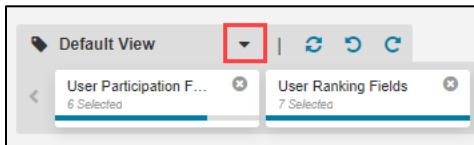
3. Hover your cursor over the **three vertical dots** and click the **DELETE** option.
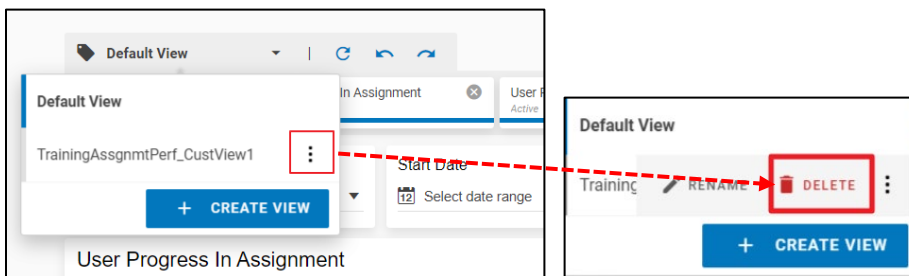
4. On the Delete View confirmation message, click **CONFIRM** to remove the report view from your list.

WORKING WITH SCHEDULED EXPORTS

The Scheduled Exports option enables you to automate and manage the process of exporting report table data in .CSV file format to all or selected Admins or Managers. After setting up the frequency, report content, and recipients, the system will export the reporting data per the set schedule. You can add up to 200 scheduled export communications.

> **Notes:**
> - Only the following user roles can access the Scheduled Exports function: Super Admin, Reporting Admin, Training Admin, and Phishing Admin.
> - You can create custom report views for any report to help focus report table data. See Creating a Custom Report View to set up custom views.

Scheduled Export Email Notification Templates

Prior to creating scheduled exports, you will first at least one email template to be in an "Approved" state that will be sent to recipients with the scheduled export. The platform contains a default email template that you can use that is "approved" and "active." The "active" designation means that this email template will be the one used when selecting "Always Send Active Template" for the Scheduled Export communication.

If you want to create your own email template, we recommend that you modify or duplicate the default template that already exists in order to take advantage of basic information and embedded links within it.

For example, you can customize the email template with your company logo, branding information, font styles, and other editing features to tailor it for your organization.

> **Note:** The report export .CSV file provided within the Scheduled Export email to recipients will expire 10 days after the email is received.

For an email notification template to be selectable from the Notification Email Name drop-down list within the scheduled communication, its Status must be **Approved**. For it to appear as the **"(active)"** template in the list, its Status must be set to **Approved** *and* the **Active** checkbox must also be selected. Only one template at a time can be set to "Active."

Email Notification   **Scheduled Exports Communication**

Adding Email Notifications

While it is possible to create a new notification from a blank template using the steps below, it is easier to duplicate or edit the default email notification template, which ensures that you're using the basic content and embedded information of the default template in addition to entering some customized content to meet your business needs. Refer to Editing or Duplicating Email Notifications for more information.

To add a new email template from scratch, do the following:

1. In the platform under **Administration**, click **Notifications**.

2. Click **Scheduled Export (Reporting)** to display the available notification emails. A default email notification is automatically provided in the system, but you can add others by clicking the **+ADD** button above the table.

3. Enter the following information in each field on the Add Notification page in the Provide Content Metadata section on the left.

Field	Description
Name	Enter a unique, descriptive name for the email template. This name will display in the Email Notifications library under Scheduled Exports (Reporting). It will also display in the Notification Email Name drop-down list when creating or editing a scheduled communication. Refer to Creating a Scheduled Export for more information.
Category	Select **Scheduled Export (Reporting)**.
Description	Enter an internal description for your reference that summarizes and describes the contents of the email.
Status	Keep the status as **Draft u**ntil you are ready to finalize the email template. When it's ready to finalize and use in communications, select **Approved**.

Field	Description
	Notes: • The Status must be set to Approved before the template can be set to Active. Draft templates cannot set to Active. • Draft email templates will not display in the drop-down list for the Notification Email Name field within the Scheduled Export Communication window.
Language	Select the language in which you want to catalogue this email notification. The Language drop-down does not change the translation of the text. It's simply used as a way of cataloging your notifications.
Active checkbox	Selecting this checkbox makes this email template the one that is used when the "Always Send Active Template" option is chosen for the Notification Email Name field within the Scheduled Export Communication. Refer to Creating a Scheduled Export for more information. The Active checkbox is only available for templates with the Status of Approved. Only one template at a time can be set to Active. **Note:** Since you have the ability to change which email template is set to Active at any time, the one sent for the scheduled export configured to use the "Always Send Active Template" option may differ from the one that was default at the time you created the communication. The "Always Send Active Template" will use whichever template is configured with the Active checkbox selected.

4. Use the table below to enter the information for the Add Notification section of the page. This is where you will be creating the From, Subject, and body of the email

Field	Description
From Name	Enter the name that will appear in the email as the sender of the email.
From Address	Enter the email address from which the email is being sent that will appear in the email.
Subject	Enter a short description of the topic of the email that the recipient will view.
Editor text box	Use the features of the text editor to enter the necessary information for the body of the email. For example, you can choose font styles and sizes and insert tables, links or graphic files (such as company logo).

5. Click **Save**.

> **Note:** The email notification is in a *Draft* status and <u>cannot</u> be used until the status is changed *Approved*.

6. Click **Preview** to review the changes and send a test email, if desired.

7. To send a test email, click **Share** on the Preview window, type **your email address** in the **To:** field, and click **Send**. Then, check your email Inbox and verify that you received the template.

> **Notes:**
> - If you do not receive the test email within 15 minutes, please check your Spam and Junk Mail folders.
> - If you still do not see the test email notification, your email filters most likely blocked it. You may need to contact your email administrator or Customer Support for help.

8. Once you're done reviewing and testing the email, navigate back to the **Edit Notification** page and do the following to finalize the template:

   a. Change the **Status** from *Draft* to **Approved**.

   b. Select (check) the **Active** box **Active** if you want to make this template the default (active) template. Only one template can be active at a time.

9. Click **Save**. You are redirected to the Email Notifications list page.

Editing or Duplicating Email Notifications

You can edit or duplicate the Default email notification template or any custom templates that you have already created. It's common and recommended to duplicate the Default template so that its basic outline and embedded fields remain, while also giving you the opportunity to tailor the other text to your business needs.

> **Note:** If you choose the option to **Always Send Active Template** for the **Notification Email Name** field within the **Scheduled Export Communication** window, and you change the default (active) template, the exports will receive the new default, not the original template that was the default (active) one at the time you created the communication.

To edit or duplicate an existing email notification, do the following:

1. To edit or duplicate an email template, select the checkbox next to the notification you wish to edit or duplicate and click the corresponding **EDIT** or **DUPLICATE** option below the table.

2. Make your changes to the template using the tables below.

Provide Content Metadata section	
Field	**Description**
Name	Enter a unique, descriptive name for the email template. This name will display in the Email Notifications list under Scheduled Exports (Reporting). It will also display in the Notification Email Name drop-down list when creating a scheduled communication. Refer to Creating a Scheduled Export for more information.
Category	Select **Scheduled Export (Reporting)**.
Description	Enter an internal description for your reference that summarizes and describes the contents of the email.
Status	Until you are ready to finalize the email template, keep the status as **Draft**. When it's ready to finalize and use, select **Approved**. **Note:** The Status must be set to **Approved** before the template can be set to Active.
Language	Select the language in which you want to catalogue this email notification. The Language drop-down does not change the translation of the text. It's simply used as a way of cataloging your notifications.
Active checkbox	Selecting this checkbox makes this email template the one that is used when the "Always Send Active Template" option is chosen for the Notification Email Name field within the Scheduled Export Communication. Refer to Creating a Scheduled Export for more information. The Active checkbox is only available for templates with the Status of Approved. Only one template at a time can be set to Active. **Note:** Since you have the ability to change which email template is set to Active at any time, the one sent for the scheduled export configured to use the "Always Send Active Template" option may differ from the one that was default at the time you created the communication. The "Always Send Active Template" will use whichever template is configured with the Active checkbox selected.

Edit Email Notification Template section	
Field	**Description**
From Name	Enter the name that will appear in the email as the sender of the email.
From Address	Enter the email address from which the email is being sent that will appear in the email.

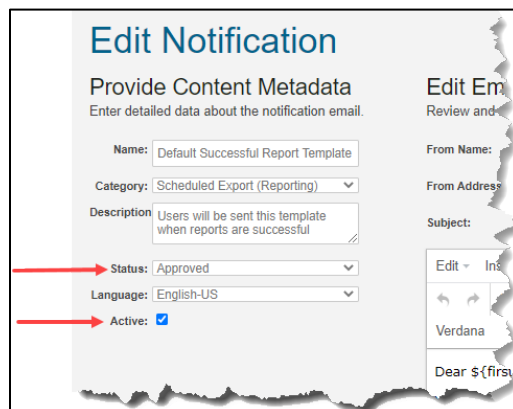| Edit Email Notification Template section	
Field	**Description**
Subject	Enter a short description of the topic of the email that the recipient will view.
Editor text box	Use the features of the text editor to enter the necessary information for the body of the email. For example, you can choose font styles and sizes and insert tables, links or graphic files (such as company logo).

3. Click **Save**.

> **Note:** The email notification is in a *Draft* status and <u>cannot</u> be used until the status is changed *Approved*.

4. Click **Preview** to review the changes.

5. To send a test email, click **Share** on the Preview window, type **your email address** in the **To:** field, and click **Send**. Then, check your email and verify that you received the template.

> **Notes:**
> - If you do not receive the test email within 15 minutes, please check your Spam and Junk Mail folders
> - If you still do not see the test email notification, your email filters most likely blocked it. You may need to contact your email administrator or Customer Support for help.

6. Once you're done testing the email, navigate back to the **Edit Notification** page and do the following:

   a. Change the **Status** from *Draft* to **Approved**.

   b. Select (check) the box next to **Active** if you want to make this template the default (active) template. Only one template can be active at a time
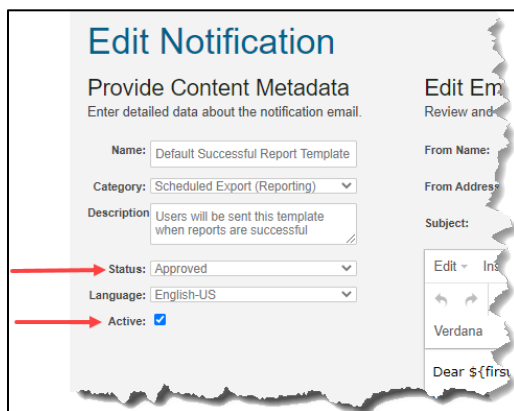
7. Click **Save**. You are redirected to the Email Notifications list page.

Creating a Scheduled Export

Use the steps below to set up the name, frequency, content, and recipients for the exported report. Reports are exported in .CSV file format.

1. Click **Scheduled Exports** under **Reporting** in the left navigation bar.

2. On the Scheduled Exports page, click the **CREATE COMMUNICATION** button.
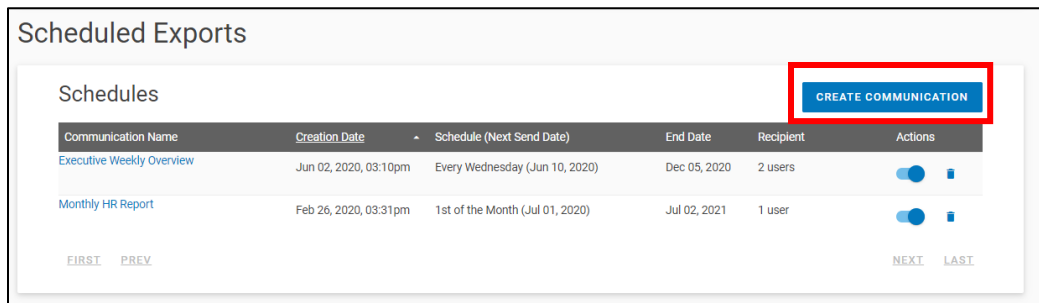
3. In the **General Details** section, enter a descriptive name in the **Communication Name** field for the schedule being created.

4. Use the table below for the **Frequency** section to select the days and times to send out the communication:

Field	Description
Frequency	Select how often you want the report to be exported. For example, immediately, daily, weekly, monthly, and so forth. **Note:** If you select "Immediately," it will appear in the Schedules list as "One Time Only" and will not have a Next Send Date.
Day(s) of the Week	If Weekly was selected as the Frequency, choose the day or days of the week to send the report to the recipients.
Select Time	If Daily or Weekly was selected as the Frequency, select or enter the time to send the report to the recipients.
Start Date	Using the calendar that displays, select the date on which you want the schedule export to begin sending to recipients.

Field	Description
End Date	Optionally, using the calendar that displays, select the date on which you want the scheduled export to stop being sent to recipients. If End Date is left blank, the scheduled export will run until your license expires.
Time Zone	Select the correct time zone for the communication. You can also use the empty Search box to begin typing letters to locate the desired time zone. If you need to use multiple time zones, you must create a scheduled export for each time zone.

5. Use the table below to enter data in the **Content** section.

Field	Description
Notification Email Name	From the drop-down list, select which approved email template to use to send the communication. You can select to always send the active email template or choose the default (active) email template or one of the other approved email templates listed (if applicable). See Scheduled Export Email Notifications for more information on email notification templates. Notes: • If you choose the option to **Always Send Active Template** for the Notification Email Name field, and you change the default (active) template within the Notifications library, the exports will receive the new default template and not the original one that was the default (active) one at the time you created the communication. In other words, the default (active) template can change, so it's something to be aware of when choosing the "Always Send Active Template" option. • Unlike other email notifications in the platform, the "Do not send new assignment notification" is not an option for scheduled exports. All scheduled exports *must* have an email template selected for it. • Only templates in approved and/or active states will populate in the drop-down. If a template is still in Draft status, it will not appear in this list.

Field	Description
Report Type	From the drop-down list, select whether you are sending the report to **Administrator** (default) or **Manager** level recipients. **Note:** If no managers are defined for your organization, then this field will be read-only and set to Administrators.
Report Name	From the drop-down list, select which **report** to schedule. This list contains the report names listed on the All Product Reports page of the platform.
View Name	From the drop-down list, select the **report view** to use for this export. This list displays all the default and custom report views (if applicable) that you created for the report name selected above. Refer to Working with Custom Report Views to learn more about custom report views.
Table*	From the drop-down list, select the desired **table** within the report view selected above to use for this export. At this time, only one table view per report export can be chosen. To send multiple tables, you must create a scheduled export for each one. **Note:** All reports and tables are available to send to Administrators. See below for the list of report tables only available for Managers.

*Only the following report tables are available for Managers:

Report Tables Available for Managers	
Report Name	**Table Name**
CyberStrength Performance	User Performance *(on Users tab)* Question Details per User *(on Users tab)* User Ranking *(on Leaderboard tab)*
Phishing Campaign Performance	Campaign Details *(on Campaign Details tab)*
Phishing User Performance	User Details
Reported Email Performance	Reported Emails
Training Assignment Performance	Assignment Details
Training Module Performance	User Participation *(on Module Performance tab)* User Ranking *(on Training Leaderboard tab)* Policy Acknowledgement *(on Policy Acknowledgement tab)*

6. In the **Recipients** section, click either of the **ADD USERS** button displayed.
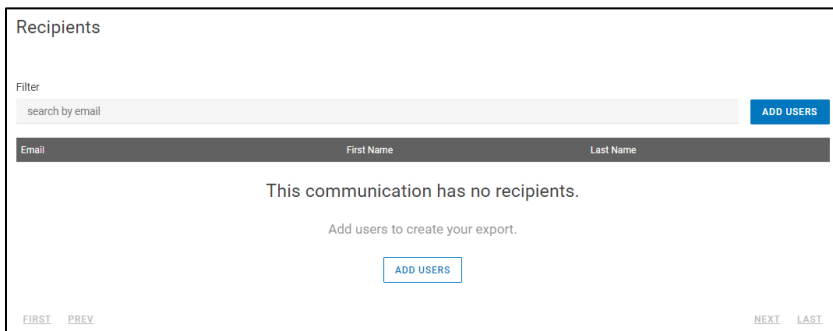
7. Based on your selection in the previous step for Report Type, the **Recipients** list will display either the names of Administrators or Managers in the system. On the **All (#) Users** tab of the Recipients section, click the **+ADD USER** link next to each person's name who will receive the exported report. If you want all of the users listed, click the **+ADD ALL (#) USERS** link. Or, to search for a recipient in the Recipients list, enter the person's email address in the **Filter** bar.
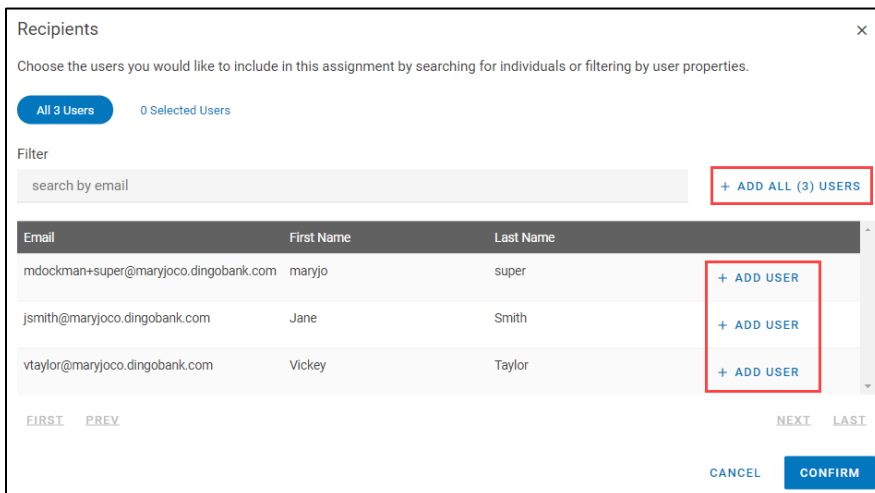
All users that you added will display on the **(#) Selected Users** tab.
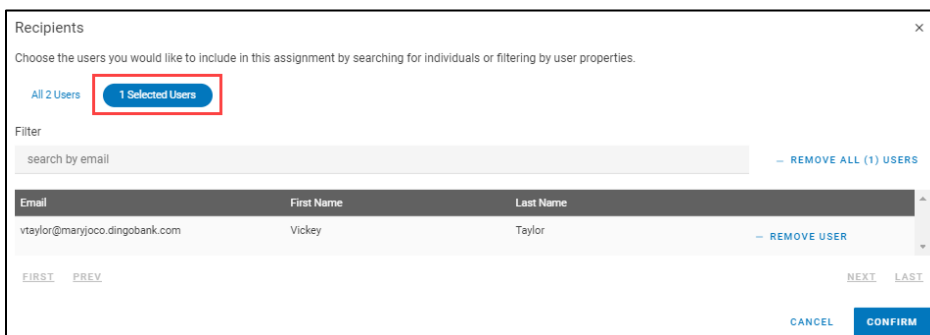
8. After adding all the report recipients, click **CONFIRM** to save the selected names. They will display in the Recipients list on the Scheduled Export page.

9. If you need to make changes to the list of selected recipients, click **MANAGE USERS** and go to the **All (#) Users** tab or **(#) Selected Users** tab to add or remove users. If no changes are needed and you are ready to save the export information, click **ADD SCHEDULED EXPORT**.
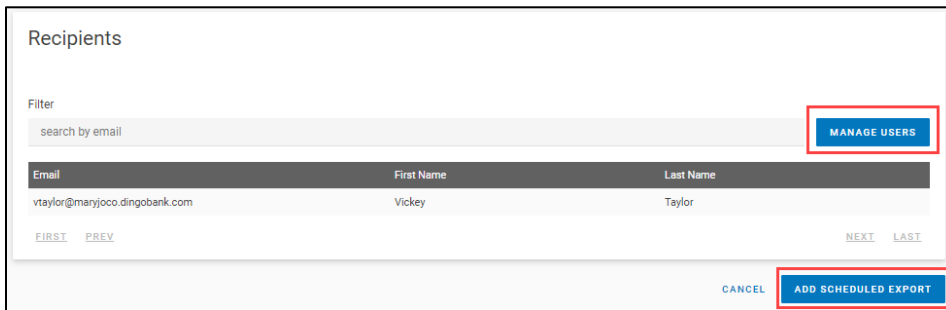
The newly created export displays in the Scheduled Communications list. By default, it's set to Enabled, so it is ready to export as scheduled. Refer to Disabling/Enabling a Scheduled Export for how to change this setting. The number of users the export will be sent to is listed under the Recipient column.
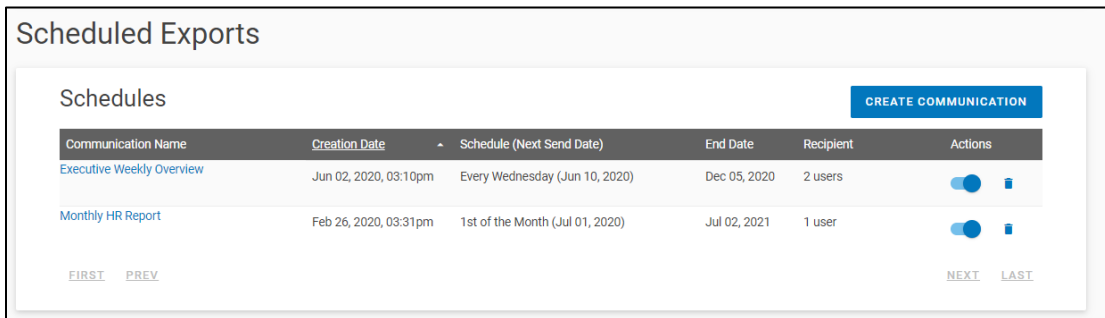
Notes: Refer the list below regarding what displays in parenthesis for **Next Send Date**:

•   **(MMM DD, YYYY)** – displays the next date on which the export will be sent if the schedule has been set to Enabled in the Actions column.

•   **(Expired)** – displays if the schedule is enabled but has passed its set End Date. You can enable this schedule if you update the date fields within the communication.

•   **(Disabled)** – displays if the schedule has been set to Disabled in the Actions column, regardless if it has expired or not.

•   **No information** displays for Next Send Date if the schedule Frequency is set to "Immediately" and the "Schedule" column of the table reads "One Time Only."

Disabling/Enabling a Scheduled Export

After saving the schedule export, it is Enabled by default in the Schedules list. The option can be toggled on (Enabled) and off (Disabled) from the **Schedules** list page.

Anytime you want to prevent the schedule export from occurring, simply toggle it "off" and the blue dot will change to white and move to the left. When disabled, the **Next Send Date** information will read Disabled. If you need to enable the scheduled export, click the toggle again to the "on" position to the right.
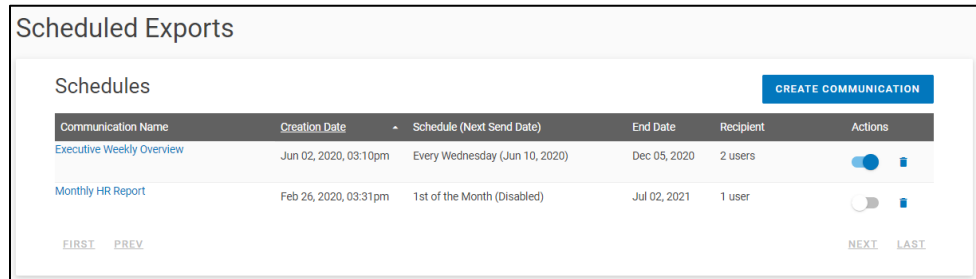
Editing a Scheduled Export

Use the steps below to edit a scheduled export communication.

1. Click **Scheduled Exports** under **Reporting** in the left navigation bar.

2. On the **Schedules** list page, click the **Communication Name** (blue link) to be edited.
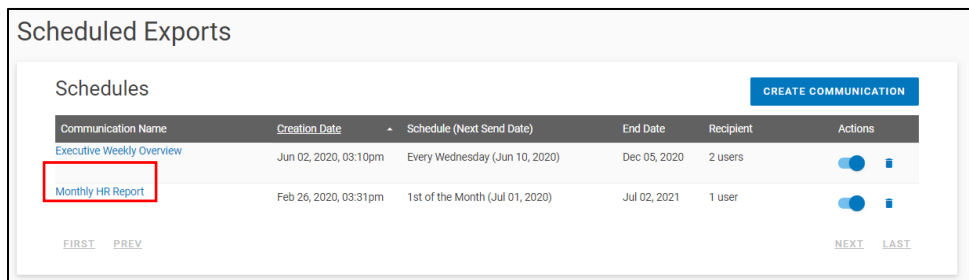
3. Make your changes to the necessary fields and click **Update Scheduled Export**.

Deleting a Scheduled Export

Use the steps below to delete a scheduled export communication.

1. Click **Scheduled Exports** under **Reporting** in the left navigation bar.

2. On the **Schedules** list page, do one of the following:

   - Click the **trashcan icon** on the right that corresponds with the scheduled Communication Name to be deleted.

   - Click the **Communication Name** (blue link) to be deleted, then click **Delete Scheduled Export** on the Edit page.

3. Click **OK** to confirm the deletion process.
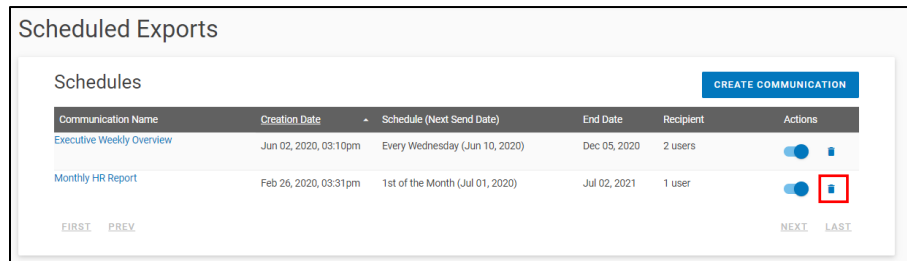
CONTACTING CUSTOMER SUPPORT

You can contact Customer Support for assistance from within the Wisdom Community, by telephone, or by email. Within the Wisdom Community, you can live chat with a Support Representative, create a new support case, ask a question of the entire user community forum, and view support documentation and Knowledgebase articles for immediate answers to your questions.

Through Wisdom Community

From within the Wisdom Community, you can live chat with a Support Representative, create a new support case, or ask a question of the entire Community forum.

1. Sign into the Security Education Platform.

2. Click the **Community** link in the upper right corner of the Platform.

3. From the Wisdom Community Home page, click **Contact Support** link on the main page, or click your username in the upper right corner of the page and select **Contact Support** from the drop-down menu. Use any of the following options on the Help Finder page.

Chat Now!	Connect with our support team on Live Chat from 2 a.m. to 9 p.m. ET Monday through Friday. Click the **Chat Now!** button, fill out the form, and click the **Request a Chat** button.
Create A New Support Case	Fill out the fields under **Create A New Support Case**, add an attachment (optional), and click **Submit**.

By Telephone or Email

You can contact Customer Support by telephone and email as follows:

Phone	United States:	1-866-714-4042
	EMEA:	+44 (0) 20 3478 5602
Email	wst-support@proofpoint.com	

Viewing Documentation and Knowledgebase Articles

Before contacting Customer Support, you can access the Wisdom Community to view Knowledgebase articles, support documentation, release notes, and guides, which may be a more immediate resource for the answer to your question.

1. Sign into the Security Education Platform.

2. Click the **Community** link in the upper right corner of Platform.

3. Enter your login credentials and click **Log in**.

4. Click on any of the tabs or links or enter criteria into the **Search** textbox to locate helpful information. You can also click the **Downloads** tab to view PDF files for guides and release notes.