

proofpoint.

Security Awareness Training

BUSINESS INTELLIGENCE Administrator Guide

Authinistrator Guiu

June 2020

Table of Contents

Reporting Overview
Navigating the Report Dashboard
Report Refresh Rate.4Filtering Data.5Filters Selected.5Using the Filters.5Using the Calendar Date Selectors.7KPI Boxes.8Table Navigation.8Donut Graph Navigation10Bar Chart Navigation.10Benchmarking.11Lasso Tool.13
Downloading Data13
Working with Custom Report Views14
Creating a Custom Report View
Working with Scheduled Exports16
Scheduled Export Email Notification Templates 16 Adding Email Notifications 17 Editing or Duplicating Email Notifications 21 Creating a Scheduled Export 24 Disabling/Enabling a Scheduled Export 29 Editing a Scheduled Export 29 Deleting a Scheduled Export 30
Contacting Customer Support

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.

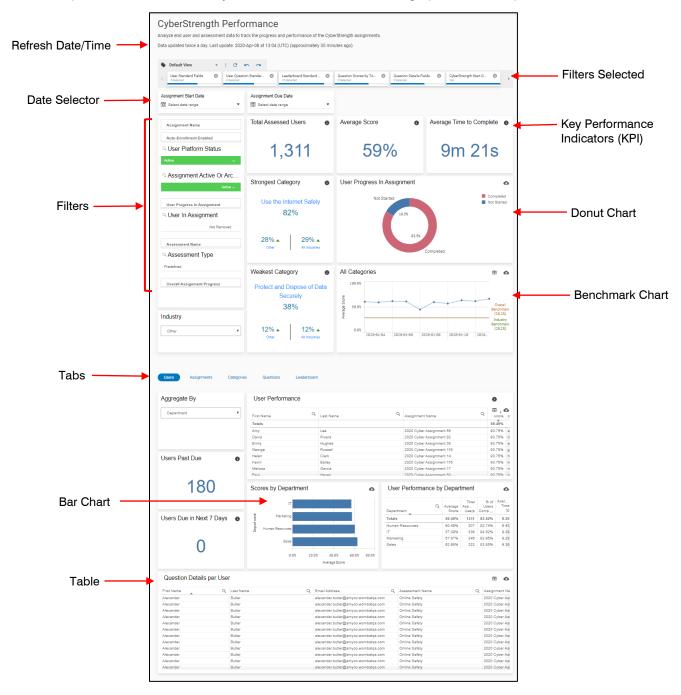
If you need to download data from charts and tables, you can export it to Excel and CSV file formats.

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)	
<u>US (New York)</u>	<u>AP (Sydney)</u>	<u>EU (Dublin)</u>
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.

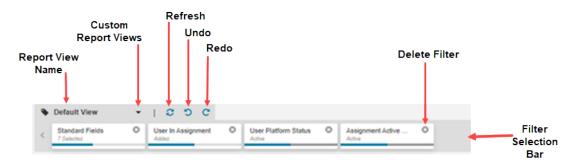
Data updated twice a day. Last update: 2020-Apr-08 at 16:04 (UTC) (approximately 40 minutes ago)

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 ago44 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 <u>Creating a Custom Report View</u> for more information on how to create custom views. Note: The Default View only includes active users in the system.
- **Refresh** Click the refresh ² button to reload the page using the selected filters.
- Undo Click the undo ² button to reverse the last action(s).
- **Redo** Click the redo C 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.

Assignmer	nt Type
User Progr	ess In Assignment
Assignmer	nt Is Priority
Assignmer	nt Is Auto Enrolled
Assignmer	nt Active Or Deleted
User In Ass	signment
Overall As	signment Progress
User Platfo	orm Status

- **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.

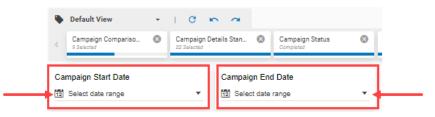
Co 🗙	~
Q Search in listbox	
Attachment	
Data Entry	
	1
	1
	-
Campaign Type	
Campaign Is Archived	
User Platform Status	

- 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.

											<		npaign C lected	ompariso 🔇	Campaign	Details Stan 🔇	Campaign Status 2 Selected	6
													gn Star ct date i		•	Campaign End		
12 20	019-0	4-18					12 2	2019-	09-2	6				Select:				
<			or 20'	19					М	ay 20	19		>	Today		Number of F	'nisn	•
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Yesterday				
	1	2	3	4	5	6				1	2	3	4	Last 7 days		· ·	106	
7	8	9	10	11	12	13	5	6	7	8	9	10	11	Last 30 days			100	
14	15	16	17	18	19	20	12	13	14	15	16	17	18	-				
21	22	23	24	25	26	27	19	20	21	22	23	24	25	This Month		Compaign	Derfermenee	
28	29	30					26	27	28	29	30	31		Last Month		Campaign	Performance	
														Range		100.00%		
																80.00%		

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.

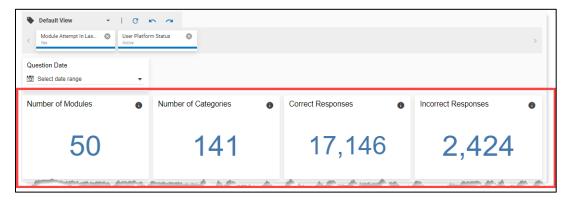


Table Navigation

Use the information below to learn how to use tables.

User Details							
First Name	Last Name	Email Address	Last Event Date	Cam Count	Uniqu Failu		
Alexander	Campbell	alexander.campbell@amydemo1.wombatqa	2020-01-18	2			
Alexander	Cook	alexander.cook@amydemo1.wombatqa.com	2020-01-18	1			
Amanda	Barnes	amanda.barnes@amydemo1.wombatqa.com	2020-01-18	2			
Angela	Kelly	angela.kelly@amydemo1.wombatqa.com	2020-01-18	1			
Anna	Garcia	anna.garcia@amydemo1.wombatqa.com	2020-01-18	1			
Anna	Hall	anna.hall@amydemo1.wombatqa.com	2020-01-18	1			
Anna	Stewart	anna.stewart@amydemo1.wombatga.com	2020-01-18	1			

Action	lcon	Description									
Scroll Bars				n or right side of the table to di ing through and viewing more							
		User Details				⊞	0				
		First Name	Last Name Q	Email Address	Last Event Date	Cam Count	Uniqı Failu.				
		Alexander	Campbell	alexander.campbell@amydemo1.wombatqa	2020-01-18	2	0				
		Alexander	Cook	alexander.cook@amydemo1.wombatqa.com	2020-01-18	1					
		Amanda	Barnes	amanda.barnes@amydemo1.wombatqa.com	2020-01-18	2					
		Angela	Kelly	angela.kelly@amydemo1.wombatqa.com	2020-01-18	1					
		Anna	Garcia	anna.garcia@amydemo1.wombatqa.com	2020-01-18	1					
		Anna	Hall	anna.hall@amydemo1.wombatqa.com	2020-01-18	1					
			Stewart	anna.stewart@amydemo1.wombatga.com	2020-01-18						

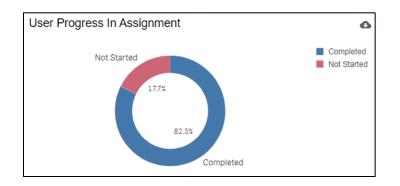
Action	lcon	Description
Sorting Column Data	•	Click the column heading to sort it in ascending or descending order. A small arrow points up for ascending order or down for descending order.
Moving Columns		Click the column heading to move, drag it to the desired location in the table, and release the mouse button.
Searching Data	q	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. <i>Tip:</i> You can also click outside the box to save your selections.
		User Details Image: First Name Last Name Email Address Department Standard Fields Alexander Campbell alexander.cont@amydem01.work Department Division Unique Failures v 0% Anna Barnes amanda barnes@amydem01.work Division Unique Failures Rate v 0% Anna Garcia anna.parcia@amydem01.work Manager Drive By Campaign Failure Rate v 0% Anna Hall anna.stewart@amydem01.work Region Dive By Campaign Failure Rate v 0% Anthony Cooper anthony.coope@amydem01.work Anthony.coope@amydem01.work 100.00% 0.
Downloading Data	٥	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 <u>Downloading Data</u> 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:

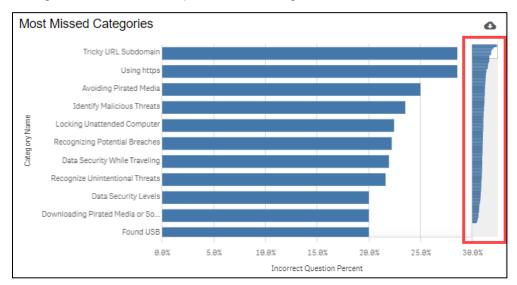
- Hover over a section to view more details.
- Click to select or deselect on one or more sections to focus the report only on the selected areas, then click the green checkmark button to save the selections. The report data will update to reflect the filters selected.
- Hold the mouse cursor down on a section of the graph to spin it clockwise or counterclockwise.



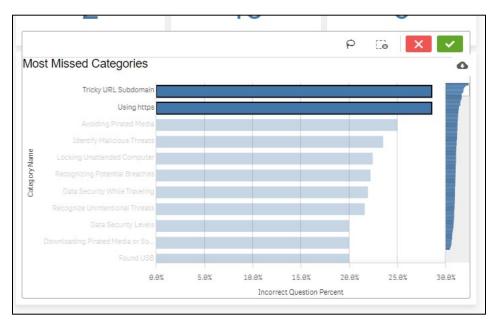
Bar Chart Navigation

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

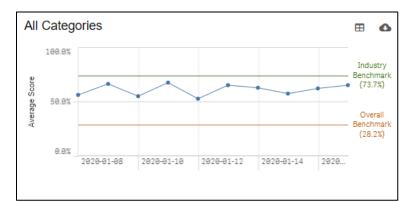
The Benchmark tile enables you to compare your organization's performance data against the same or other industries, other Proofpoint customers, and the organization itself over time to gauge results and develop an action plan to improve or maintain a competitive edge.

The highlighted areas are used for benchmarking.

	Strongest Category	User Progress In Assignment
User Progress In Assignment	Use the Internet Safely 83%	Not Started Completed Not Started
Assessment Name	43% All Industries	82.3x Completed
Predefined Overall Assignment Progress	Weakest Category Protect and Dispose of Data Securely 38%	All Categories
Industry Defense Industrial Base	54% → 12% ▲ Defense industrial Base All Industries	Solution Solution Overall 0.0% 2020-01-13 2020-01-14 2020-01-15 2020-01

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	lcon	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	٥	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 <u>Downloading</u> <u>Data</u> 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** P 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.

Question Detai		•		
First Name	Q	Last Name	Q	Email Address
Alexander		Brooks		alexander.brooks@amydemo1.womba
Alexander		Brooks		alexander.brooks@amydemo1.womba
Alexander		Brooks		alexander.brooks@amydemo1.womba
Alexander		Brooks		alexander.brooks@amydemo1.womba
Alexander		Brooks		alexander.brooks@amydemo1.womba
Alexander		Brooks		alexander.brooks@amydemo1.womba

1. In the right corner of a table or chart, click the **Download** 40 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.

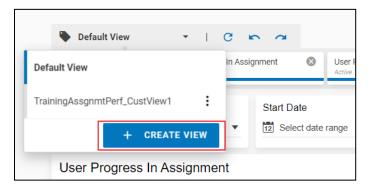
Creating a Custom Report View

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.

Create New View		×
View Name		
View Title		
Enter the new name for your view		
	CANCEL	CONFIRM

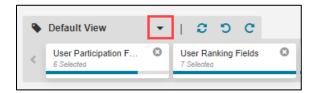
6. Click CONFIRM. The newly added report view displays in the view list.

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.

Default View	C n a
Default View	In Assignment SUser F Active
TrainingAssgnmtPerf_CustView1	
+ CREATE VIEW	V 12 Select date range
User Progress In Assignr	ent + CREATE VIEW

4. Type the new name for the report in the View Name field.

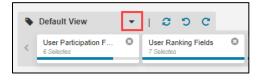
Rename View		×
View Name		
TrainingAssgnmtPerf_CustView1		
Enter the new name for your view		
	CANCEL	CONFIRM

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.

Default View -	c n a	
Default View	In Assignment SUser F	Default View
TrainingAssgnmtPerf_CustView1	Start Date	
+ CREATE VIEW	Select date range	
User Progress In Assignme	nt	+ CREATE VIEW

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 <u>Creating a Custom Report View</u> 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.

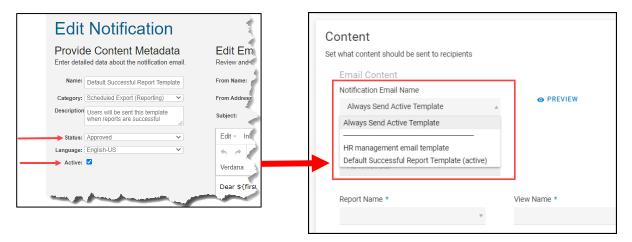
For example, you can customize the email template with your company logo, branding information, font styles, and other editing features to tailor it for your organization.

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."

Scheduled Exports Communication

Email Notification



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.
- 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.

Email No	otificatior	าร						
+ ADD								
	Name		Description	Cre	ated	Status	Language	Active
→ □ Training	New Assignn	nent						Enabled: 🗹
→ □ Training	New Assignn	nent (CyberStreng	th Auto-Enrollment)					Enabled: 🗹
→ □ Training	New Assignn	nent (Phish Auto-E	Enrollment)					Enabled: 🗹
→ □ Training	Assignment (Completion						Enabled: 🗹
→ □ Training	Assignment F	Reminder						Enabled: 🗹
→ □ CyberSt	rength New A	ssignment						Enabled: 🗹
→ □ CyberSt	rength Assign	ment Completion						Enabled: 🗹
→ □ CyberSt	rength Assign	ment Reminder						Enabled: 🗹
→ □ User Re	set Password	I						Enabled: 🗆
→ □ User We	elcome							Enabled: 🗆
- 🗆 Schedul	ed Export (Re	eporting)						Enabled: 🗹
Default Succe	ssful Report Template	Users will be sent this template	when reports are successful	01/02/202	0 Appro		English-US	1
						🖋 EDIT	d DUPLICATI	

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

Add Notification	
Provide Content Metadata	Add Notification
	Review and make any necessary changes to the notification email.
	From Name:
Category:	From Address:
Description	Subject:
Status: Draft 🗸	Edit - Insert - Table - Format -
Language: English-US	・ ・ ・ ・ B
Active:	Verdana - 11pt - ♂ ※ 르 亘 ↔
	Cancel Preview Save

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 <u>Creating a</u> <u>Scheduled Export</u> 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 <u>Creating a</u> <u>Scheduled Export</u> 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

Add Notification	
Provide Content Metadata	Add Notification
Enter detailed data about the notification email.	Review and make any necessary changes to the notification email.
	From Name:
Name:	From Name:
Category:	From Address:
Description	Subject:
Status: Draft 🗸	Edit - Insert - Table - Format -
Language: English-US V	★
Active:	Verdana - 11pt - 8 梁 亘 亘 〇
	Cancel Preview Save

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.

Edit	Notification	n	t,
	le Content Metada		Edit Em Review and
Name:	Default Successful Report Temp	late	From Name:
Category:	Scheduled Export (Reporting)	~	From Address
Description	Users will be sent this template when reports are successful	1	Subject:
Status:	Approved	~	Edit - Ins
Language:	English-US	~	500
Active:			Verdana
	Andrew	_	Dear \${first

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.

Email Notification	S				
+ ADD					
Name	Description	Created	Status		Active
Training New Assignment	ent			Enabled	d: 🗹
→ □ Training New Assignme	ent (CyberStrength Auto-Enrollment)			Enabled	d: 🗹
→ □ Training New Assignme	ent (Phish Auto-Enrollment)			Enabled	d: 🗹
→ □ Training Assignment C	ompletion			Enabled	d: 🗹
→ □ Training Assignment R	eminder			Enabled	d: 🗹
→ □ CyberStrength New As	signment			Enabled	d: 🗹
CyberStrength Assignment Strength Strength Assignment Stre	nent Completion			Enabled	d: 🗹
→ □ CyberStrength Assignment	nent Reminder			Enabled	d: 🗹
→ □ User Reset Password				Enabled	d: 🗆
→ □ User Welcome				Enabled	d: 🗆
- Scheduled Export (Rep	porting)			Enabled	d: 🗹
Default Successful Report Template U	sers will be sent this template when reports are successful	01/02/2020	Approved	English-US 🗸	
			I ED	DIT 🕲 DUPLICATE 🖥 REI	MOVE

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

Edit	Notification					
	Provide Content Metadata Edit Email Notification Template Enter detailed data about the notification email. Review and make any necessary changes to the notification email.					
Name:	Copy of Default Successful Report T	From Name:	Security Education Platform			
Category:	Scheduled Export (Reporting)	From Address:	awareness@securityeducation.com			
	Users will be sent this template when reports are successful	Subject:	Your Proofpoint Security Awareness Training Platform Report is Ready to Download			
Status:	Draft 🗸	Edit - Insert - Table	 Format - 			
Language:	English-US 🗸		E E E E A × Add Contact Property × 🗳			
		Download the file her Company: \${compa Communication Nam Format: \${format } Frequency: \${frequ Scheduled Email End Date and Time: \${d	nyName} e: \${communicationName} ency} Date: \${endDate} ateTime} \${timeZone}			
			Please note: The file provided will expire in ten days. If you are not able to download during this timeframe, simply log into the Security Education Platform and rerun the report.			
			The link in this message provides instantaneous access to the download file. Use caution when forwarding this message to individuals inside or outside of your organization.			
		Thank you.				
		Cancel	Preview Save			

Provide Conte	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 <u>Creating a Scheduled Export</u> 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 <u>Creating a</u> <u>Scheduled Export</u> 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

Edit	Edit Notification Provide Content Metadata Enter detailed data about the notification email.					
Name:	Default Successful Report Temp	late	From Name:			
Category:	Scheduled Export (Reporting)	~	From Address			
Description	Users will be sent this template when reports are successful	1	Subject:			
Status:	Approved	~	Edit - Ins			
Language:	English-US	*	5 0			
Active:			Verdana			
	Andrew		Dear \${first			

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.

cheduled Exports					
Schedules				CREATE CO	MMUNICATION
Communication Name	Creation Date	Schedule (Next Send Date)	End Date	Recipient	Actions
Executive Weekly Overview	Jun 02, 2020, 03:10pm	Every Wednesday (Jun 10, 2020)	Dec 05, 2020	2 users	•
Monthly HR Report	Feb 26, 2020, 03:31pm	1st of the Month (Jul 01, 2020)	Jul 02, 2021	1 user	•
FIRST PREV					<u>NEXT LAST</u>

- 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:

Frequency Set the day(s) and time(s) the communication should	l be sent			
Frequency *	Day(s) of the Week *		Select Time	
٣		Ψ	S 12:00 pm	
Start Date *	End Date		Timezone	
MMM-DD-YYYY	MMM-DD-YYYY		👋 New York	v

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 WeekIf Weekly was selected as the Frequency, choose the day or day 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.

Content Set what content should be sent to recipients					
Email Content Notification Email Name Always Send Active Template	Ŧ	• PREVIEW			
Attached Export Report Type * Administrator					
Report Name *	v	View Name *		Table *	
	▼	Views will load after a report is selected	W	Tables available based on the report selected	Ŧ

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 <u>Scheduled Export</u> <u>Email Notifications</u> 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 <i>must</i> 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 <u>Working</u> <u>with Custom Report Views</u> 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.

Recipients			
Filter			
search by email			ADD USERS
Email	First Name	Last Name	
	This communication has no rec	cipients.	
	Add users to create your export.		
	ADD USERS		
FIRST PREV			NEXT LAST

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.

Recipients			×
Choose the users you would like to include	in this assignment by searching	for individuals or filtering by user pro	perties.
All 3 Users 0 Selected Users			
Filter			
search by email			+ ADD ALL (3) USERS
Email	First Name	Last Name	1
mdockman+super@maryjoco.dingobank.com	maryjo	super	+ ADD USER
jsmith@maryjoco.dingobank.com	Jane	Smith	+ ADD USER
vtaylor@maryjoco.dingobank.com	Vickey	Taylor	+ ADD USER
FIRST PREV			NEXT LAST
			CANCEL CONFIRM

 Recipients
 ×

 Choose the users you would like to include in this assignment by searching for individuals or filtering by user properties.
 All 2 Users

 All 2 Users
 1 Selected Users

 Filter
 search by email
 - REMOVE ALL (1) USERS

 Email
 First Name
 Lost Name

 vtaylor@maryioco.dingobank.com
 Vickey
 Taylor

 FIRST
 PREV
 NEXT

 LAST
 CANCEL
 CONFIRM

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.

 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.

Recipients		
Filter search by email		MANAGE USERS
Email	First Name	Last Name
Email vtaylor@maryjoco.dingobank.com	First Name Vickey	Last Name Taylor

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 <u>Disabling/Enabling a Scheduled Export</u> for how to change this setting. The number of users the export will be sent to is listed under the Recipient column.

heduled Exports					
Schedules				CREA	TE COMMUNICATION
Communication Name	Creation Date	Schedule (Next Send Date)	End Date	Recipient	Actions
Executive Weekly Overview	Jun 02, 2020, 03:10pm	Every Wednesday (Jun 10, 2020)	Dec 05, 2020	2 users	i 🌑
Monthly HR Report	Feb 26, 2020, 03:31pm	1st of the Month (Jul 01, 2020)	Jul 02, 2021	1 user	•• •
<u>FIRST</u> <u>PREV</u>					NEXT LAST

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.

cheduled Exports					
Schedules				CREA	ATE COMMUNICATION
Communication Name	Creation Date	Schedule (Next Send Date)	End Date	Recipient	Actions
Executive Weekly Overview	Jun 02, 2020, 03:10pm	Every Wednesday (Jun 10, 2020)	Dec 05, 2020	2 users	•
Monthly HR Report	Feb 26, 2020, 03:31pm	1st of the Month (Disabled)	Jul 02, 2021	1 user	
FIRST PREV					NEXT LAST

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.

Scheduled Exports					
Schedules				CREATE	COMMUNICATION
Communication Name	Creation Date	Schedule (Next Send Date)	End Date	Recipient	Actions
Executive Weekly Overview	Jun 02, 2020, 03:10pm	Every Wednesday (Jun 10, 2020)	Dec 05, 2020	2 users	•
Monthly HR Report	Feb 26, 2020, 03:31pm	1st of the Month (Jul 01, 2020)	Jul 02, 2021	1 user	•
FIRST PREV					<u>NEXT</u> LAST

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.

Scheduled Exports					
Schedules				CREA	TE COMMUNICATION
Communication Name	Creation Date	Schedule (Next Send Date)	End Date	Recipient	Actions
Executive Weekly Overview	Jun 02, 2020, 03:10pm	Every Wednesday (Jun 10, 2020)	Dec 05, 2020	2 users	•
Monthly HR Report	Feb 26, 2020, 03:31pm	1st of the Month (Jul 01, 2020)	Jul 02, 2021	1 user	•
FIRST PREV					NEXT LAST

- 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.
- 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.