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Cisco Security Awareness Proof of Value Guide

August 2020

Purpose

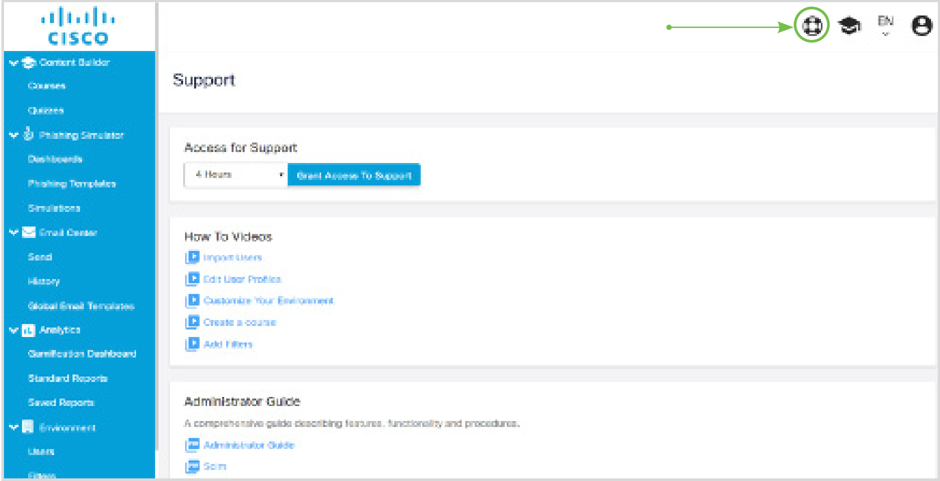
This document provides guidelines for a successful PoV of Cisco Security Awareness.

The bridge to possible

Table of Contents

Accessing Documentation

Platform “How To” videos and documentation are readily available to help you quickly become familiar with setting up various capabilities on the Cisco Security Awareness Platform. As you go through each step during your PoV, please remember to check the resources available under the Platform Support Page.



Support

Access for Support

4 Hours ▾ | Grant Access To Support

How To Videos

- Import Users
- Edit User Profiles
- Customize Your Environment
- Create a course
- Add Filters

Administrator Guide

A comprehensive guide describing features, functionality and procedures.

- Administrator Guide
- Scim

To access Support - click on the “life ring” icon from the Support page.

PoV Overview

Following are steps we recommend for a successful PoV.
We’ll go through each step in more details on the following pages.

1. **Set up Your PoV Environment**
   - Allow list Security Awareness Platform IPs
   - Access the Environment
   - Customize the Environment
   - Add User Filters
   - Import Users
   - Edit User Profiles
   - Integrate with SCIM to automate user provisioning
2. **Create and Launch a Pre-assessment Quiz**
3. **Create and Launch a Course**
4. **Create and Launch a Simulation**
5. **Create and View Reports**

1. Set up Your PoV Environment

Allow list the Platform IPs (Mandatory)

Due to the nature of the emails used, it is possible that your email server may interpret them as actual spam. You need to add the following IP addresses to your organization's email allow list.

North America IPs		
Course Notification	167.89.98.161	
Phishing Simulation	207.200.3.14	173.244.184.143
Landing and Feedback pages	52.235.47.121	
Email Attachment	52.235.47.121	

EMEAR IPs		
Course Notification	77.32.150.153	
Phishing Simulation	77.32.150.153	
Landing and Feedback pages	40.127.192.238	
Email Attachment	40.127.192.238	

Access the Environment (Mandatory)

To log in to the platform, you must be entitled. Your access credentials will be emailed to you. Once you have received an email with a URL and a username, log in to your POV environment.

Customize Your Environment (Optional)

As an administrator, you will be able to customize your environment according to the brand and culture of your organization, the platform allows two different types of personalization: Visual and Messaging.

Visual Customization

Go to Settings menu, and select the Presentation tab.

- **Modify the Primary and Secondary colors**
  Primary color is for the buttons and other interactive elements within the Learning Zone. Secondary color is for static elements in the Learning Zone. You can leverage the color palette to select a custom color, or simply add your branding color code to apply the exact corporate color selection.
- **Modify the environment logo**
  You can either select an existing logo using the Media Library or upload your specific logo using the Upload File button. For best results, the file should be a minimum of 80 x 80 pixels in png or jpg format.
- **Customize your background image**
  You can either select an existing Background image using the Media Library or upload your specific Background using the Upload File button. For best results, the file should be a minimum of 2000 x 1100 pixels in png or jpg format. Please note that the background is displayed in the Learning Zone so remember that right half of the background image will be the most evident.
- **Modify the Favicon for your user's browser tab**
  The Favicon is the icon users see on the browser tab. By using the Upload File button, you can upload your own Favicon at a maximum of 16 x 16 pixels in .ico format.

Messaging Customization

You can customize the text and messages that display on the user interface. From the Environment menu, click Settings, then click the Presentation tab. In the Text group, you can find the text input areas for all the customizable text fields, click each item to enter its text.

- Set the login page message
- Modify the Learning Zone text, by modifying the home page message and title
- If your environment has multiple languages, make the changes in all languages to support all your users in their native language

Add User Filters (Optional)

Adding filters to an environment will allow you to pick a group of users who have common attributes. Examples of filters include Country, City, Office location, Division, Region, Department, or Role. By adding a filter value to a user, you can assign specific courses or simulations to a selected group of users who have the same attribute.

- **Add a user filter**
  Go to Filters on the left of the page near the bottom. Click on Add New Environment Filter near the top. In the text box type the name of your desired filter, for example City.

  To make this filter a Mandatory filter, select Required. This requires an admin to fill in the filter attribute when adding users. To add an Optional filter, leave the check box unselected.

  If you would like to use your filter to create a hierarchy that mimics your organization add a Manager email filter by selecting the Manager Email checkbox. you will be able to define for example manager of managers with their own direct reports.

  In the Default Value text box, you can enter a filter default value. When you create a new user, this default value will be automatically added to the user unless you change it.

- **Apply a filter to your users**
  Now that you have created your filters, you can apply the filter to flag a user with a specific attribute. To do so, Click Users, Add New User or select an existing user. You will see your new filter and a text box where you can add an appropriate attribute. If you selected the Required box for this filter you will not be able to save this user until you enter an attribute. For example, you can add all your user's location in the City filter.

- **Filter a list of users**
  Using filters to sort users in the user list, enables you to deliver content to a specific group of users, send emails to a select group, or run reports for a specific group.

  For example: you could pick all users in New York. You can target these users with content based on their role, department or business unit.

Import Users (Mandatory)

To make your user creation faster, you can upload multiple users at one time into the platform using an import file or you can create them one at a time.

- **Download sample file**
  Go to the Users page then click the Download Sample File button to access the sample import file that is provided in the platform.

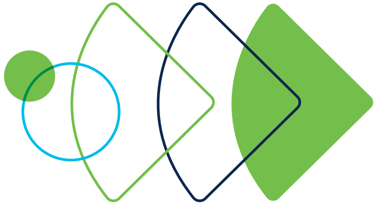
On the sample import file, at a minimum the user list must contain the following mandatory fields

- User's email address
- First name
- Last name
- Username – this can be same as their email address or a specific username can be created

Optionally, you can provide:

- Language. To fill this optional field, you can use a language code provided in the language code tab
- Time zone. To fill this field, you can use the time zone codes provided in the time zone sheet
- Manager Username or email is used to link the user to their manager
- Password is used to provide your user with a password. By default, the platform allows users to create their own the first time they login
- Active to activate or deactivate users
- Custom Filter. you can create up to 50 custom filters columns to upload. The column should be named after the filter and then you must populate the field with the filter's value or user attribute.

- **Upload your user list**
  To upload your own sample list, fill in the sample file with user values. Then, from the Users page click on the Upload Users button. Choose the file you want to upload then click the Upload button. Once on the Mapping page, select which tab of the spreadsheet you would like to use. In the Fields Mapping. map the filter columns containing user attributes from the spread sheet on the left to the current platform filters you previously created on the right. Click on Proceed and your user list will be imported, and you will see your new users added here on the User List page.



Edit the user's profiles (Mandatory)

Once you've uploaded your users, editing user profiles allows you to make changes to a specific user's attributes.

- **Create some administrators**
  On the Role tab, there are three different roles you can assign to each user. By default, all users are created with the User role. It grants access to the Learning Zone, where users can take the courses and quizzes they are assigned. Those with a User role cannot access administrative features.

  Under Platform

  - A Global Admin will be allowed to manage every aspect of the platform
  - A User Admin can manage every aspect of the platform pertaining only to a specific set of users. For example, you can use the filters to define an administrator for a department only.

  Under Phishing

  - Global Admin can manage every aspect of a phishing simulation

  - Only the Phishing Templates will be visible to a Content Writer and they will be able to create, customize and edit them.
  - Phishing Management allows for the viewing of simulation dashboards, templates, scenarios and recipient lists. A user with this role cannot launch simulations.
  - The Simulation Launch role provides all the access from Phishing Management including the ability to launch Simulations.
- **Set some users as phishing recipients**
  In the Role tab, you can select a user as a Phishing Recipient and enable them as a candidate to receive Phishing Simulations. If the platform is configured to add all users as Phishing Recipient, this will already be selected. If you do not want this user to be a Phishing Recipient, simply deselect this option.

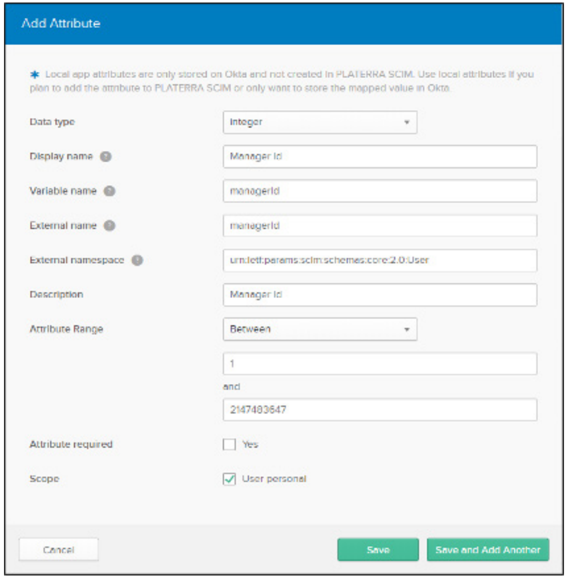
Integrate with SCIM to automate user provisioning (Optional)

System for Cross-domain Identity Management (SCIM) is a standard for automating the exchange of user identity information between identity domains, or IT systems.

- **Enable SCIM in environment settings**
  Your environment should have the option SCIM provisioning and Enable SCIM should be activated in settings. Once you have saved your settings, a token will be created.
- **Configuring SCIM Provisioning for Microsoft Azure AD**
  To enable provisioning to Azure Databricks using Azure Active Directory (Azure AD) you can follow the steps outlined in the document https://docs.microsoft.com/en-us/azure/databricks/administration-guide/users-groups/scim/aad
- **Configuring SCIM Provisioning for OKTA**
  - Configure SCIM API integration in OKTA

    Log in into OKTA and add the PLATERRA SCIM application. Go into the PLATERRA SCIM application and select the Provisioning tab. On the left in Settings, then click on Integration
  - Click on Configure API Integration, check Enable API Integration and fillthe information based on the SCIM Provisioning of your environment
  - Click on Test your API configuration to validate and save
  - Select to App on the left Menu and select the features Create Users, Update Users Attributes and Deactivate Users and click save
  - Go to Directory, then Profile Editor. Click on Profile of the Terranova SCIM application. Click on Mappings and select PLATERRA SCIM to Okta on top
- **Un-map unnecessary fields and attributes**
  First, you need to un-map all attributes and Save. Then, in Profile Editor remove all attributes not used by PLATERRA SCIM, and keep only Username, Given name, Family name, Primary email, Primary email type and Time zone.

- **Map the needed fields**
  Setup a Manager Email attribute by clicking Add Attribute and fill the information as below.

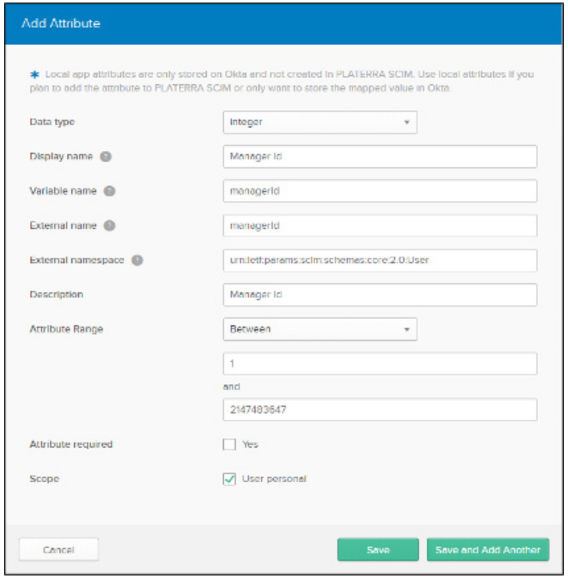


Add Attribute

✱ Local app attributes are only stored on Okta and not created in PLATERRA SCIM. Use local attributes if you plan to add the attribute to PLATERRA SCIM or only want to store the mapped value in Okta.

Data type	Integer ▾
Display name	Manager Id
Variable name	managerId
External name	managerId
External namespace	urn:ietf:params:scim:schemas:core:2.0:User
Description	Manager Id
Attribute Range	Between ▾
	1
	and
	2147483647
Attribute required	☐ Yes
Scope	☑ User personal

Setup a Manager Id attribute by clicking Add Attribute and fill the information as below.

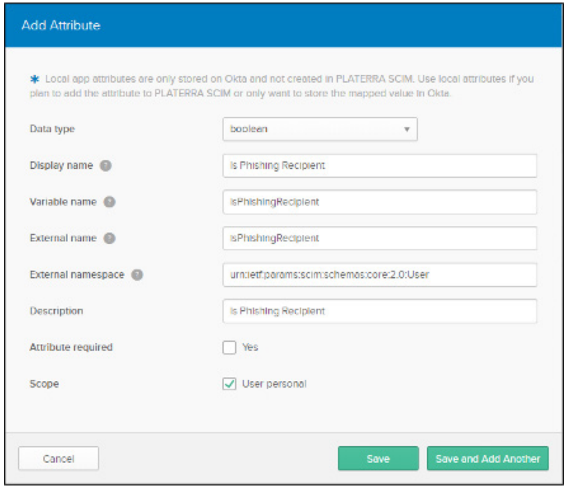


Add Attribute

✱ Local app attributes are only stored on Okta and not created in PLATERRA SCIM. Use local attributes if you plan to add the attribute to PLATERRA SCIM or only want to store the mapped value in Okta.

Data type	Integer ▾
Display name	Manager Id
Variable name	managerId
External name	managerId
External namespace	urn:ietf:params:scim:schemas:core:2.0:User
Description	Manager Id
Attribute Range	Between ▾
	1
	and
	2147483647
Attribute required	☐ Yes
Scope	☑ User personal

Setup a Is Phishing Recipient attribute by clicking Add Attribute and fill the information as the image below.

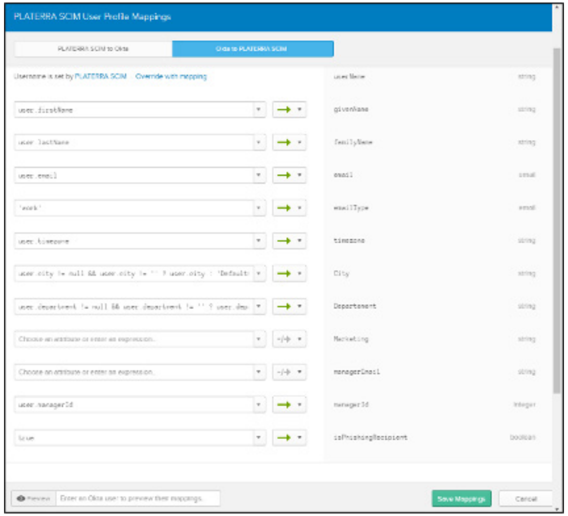


Add Attribute

✱ Local app attributes are only stored on Okta and not created in PLATERRA SCIM. Use local attributes if you plan to add the attribute to PLATERRA SCIM or only want to store the mapped value in Okta.

Data type	boolean ▾
Display name	Is Phishing Recipient
Variable name	isPhishingRecipient
External name	isPhishingRecipient
External namespace	urn:ietf:params:scim:schemas:core:2.0:User
Description	Is Phishing Recipient
Attribute required	☐ Yes
Scope	☑ User personal

- **Map fields to the platform filters**
  In Profile Editor click Mappings and ensure PLATERRA SCIM to OKTA is selected on top. Map all corresponding fields with your OKTA User Profile and click save.
- In Profile Editor click Mappings and ensure Okta to PLATERRA SCIM is selected on top. Map all corresponding fields with your Okta User Profile and click save.



PLATERRA SCIM User Profile Mappings

Username is set by PLATERRA SCIM   Override with mapping

		userName	string
user.firstName	→	givenName	string
user.lastName	→	familyName	string
user.email	→	email	email
'work'	→	emailType	email
user.timezone	→	timezone	string
user.city != null && user.city != '' ? user.city : 'Default	→	City	string
user.department != null && user.department != '' ? user.dep	→	Department	string
Choose an attribute or enter an expression...	-/→	Marketing	string
Choose an attribute or enter an expression...	-/→	managerEmail	string
user.managerId	→	managerId	integer
true	→	isPhishingRecipient	boolean

Note: City and Department are examples of required filters in your environment. The SCIM Server will expected to receive values for those custom attributes.

2. Create and Launch a Pre-assessment Quiz

The purpose of quizzes is to test users on their knowledge of information security before and or after a security awareness campaign. A pre-assessment quiz, given before the campaign, serves as a preliminary baseline. With this information, a campaign can be well defined and training topics can be prioritized. A post-assessment quiz can help you measure a campaign's effectiveness.

- **Create a training survey (Mandatory)**
  This can be used to understand the organization's strength and weakness in security awareness before rolling out a campaign. Start by clicking on quizzes and add new quiz.
- **Set the survey's information (Mandatory)**
  Set the title of the survey. And the description to something useful to differentiate the quiz by. Add languages in which you would like to offer your quiz based on your user base and define some rules for the survey. Let's select Mandatory, to ensure all users must fill the survey and Show Result Details, and Show feedback, so that users can see their answers and receive feedback.

  But let's not select scored since this is just a survey.

  For a pre-assessment quiz, there is no reason to allow repetition which would allow users to improve a result on a scored quiz, and the survey should be hidden on completion, so that it disappears from the users to do list. Finally, let's not select anonymous reporting since we would like to report on users' answers.
- **Set the quiz thumbnail (Optional)**
  Set a quiz thumbnail to easily differentiate it in the Learning Zone. You can select one from the media library or upload your picture from any location.
- **Select the quiz questions (Mandatory)**
  To choose from among our pre-built bank of questions, click on import questions. If this isn't your first quiz, you will be able to draw questions from a pre-existing quiz here.

  For now, click on bank of questions to find all the topics in the information security awareness course. For each topic, there are 5 questions of different formats: check box, multiple choices, true or false.

  To get an overview of the user's security awareness knowledge, select a few from each of these categories, or choose to focus on a few.
- **Customize the quiz messages (Optional)**
  You can customize, the User Interface Quiz Title, which is the user facing title of the quiz, the user facing description of the quiz, the introduction text when users start the quiz, and the conclusion text that will appear when they have completed the quiz. For this survey, you can leave the Success Message, which is the message that is displayed when users pass the quiz, and the Failure Message, which is the message that is displayed when users fail the quiz, empty since there is no score.
- **Manage access to your quiz (Mandatory)**
  On the Access Management tab, select Unrestricted Access, if you would like the quiz to be available to all your users. However, to send a more specific post training course quiz, you can access the filters in the Restricted Access sections to target the right audience. Use anonymous quiz, to send the user a link and a password separately.

- Review your email templates and make sure they are adapted to your user base (Mandatory)
- On the Email Templates tab, you can review the existing Templates for Quiz Access, Quiz Completion and Reminder – Quiz Access. These represent the emails that users will receive during their Awareness Campaign based on their status. You can use these templates as is or customize any aspect of them up to and including the source code. You can also create your own Custom Template from scratch.
- **Validate your quiz (Mandatory)**
  You can validate your quiz per language, ensure that you haven't left out any information, and preview the content, before putting your quiz online and sending the communication to your users. You can choose to put different languages out at different times to make sure you are reaching your users according to your timeline. Finally, you can put your quiz online. Once the quiz is online, you can send an email notification to the users.
- **Communicate to your users that they have been assigned a quiz (Mandatory)**
  Click on Send Email to, then choose the correct Email Template, typically Quiz Access. Under Send Email, you have 3 choices: Now, Later or Recurring.

  Choose the current group of users that was selected previously. You can refine or add to the group using Filters or simply select the status of the users you want the email to go to. For any of these emails, you can CC the group's manager or managers. You can also add users manually to this target group.

3. Create and Launch a Course

Select and combine different topics to provide course content for a specific group of users. Create your course and offer it in multiple languages.

- **Create a default Certificate to provide recognition for course completion (Optional)**
  To create your own default certificate that can be applied to all courses in the platform, navigate to the environment settings page, presentation, scroll to the bottom, click on certificate text and create your own custom certificate. Important: Remember to apply changes to all languages.
- **Create a new course (Mandatory)**
  Click on Courses at the top left of the page, then click on Add Course. Select the languages you want this course to be available in and click add after each. Be sure to set the course title.
- **Set course content (Mandatory)**
  Confirm your content selection, the number and order of the topics as well as the total estimated time for this course. You will the see the default passing score and you can decide whether to make the course mandatory or not.
- **Validate your course genreal information, content, description (Optional)**
  Change the course's thumbnail for identification in the Learning Zone, then give your course a logo that will match your organization's branding.

  Modify the rules for your course, including the passing score as well as the information the user will see in their Learning Zone.
- **Enable Gamification (Optional)**
  Turn Gamification on next and decide what information the user will see in their Learning Zone as well as the number of points gained for a correct answer and the number lost for an incorrect one.
- **Set messages and certificates to reward your users for completing the course (Optional)**
  You can Import a Certificate to provide recognition for course completion. In both cases every aspect of the message and Certificate can be modified up to and including the source code. Important: Remember to apply changes to all languages.
- **Manage access to your course (Mandatory)**
  On the Access Management tab, make sure that Restricted Access is selected, and that the Filters switch is moved to right. Then click on the Select Filters button and choose the group of users that you want to provide this course to. You can also add users manually if you wish. You may choose from the user based on their answer to pre-assessment quiz.
- **Review your email templates and make sure they are adapted to your user base (Mandatory)**
  On the Email Templates tab, you can review the existing Templates for Course Access, Course Completion and Reminder – Course Access. These represent the emails that users will receive during their Awareness Campaign based on their status. You can use these templates as is or customize any aspect of them up to and including the source code. You can also create your own Custom Template from scratch.

- **Validate your course (Mandatory)**
  You can validate your course per language, ensure that you haven't left out any information, and preview the content, before putting your course online and sending the communication to your users. You can choose to put different languages out at different times to make sure you are reaching your users according to your timeline. Finally, you can put your course online. Once the course is online, you can send an email notification to the users.
- **Communicate to your users that they have been assigned a course (Mandatory)**
  Click on Send Email to, then choose the correct Email Template, typically Course Access. Under Send Email, you have 3 choices: Now, Later or Recurring.

  Choose the current group of users that was selected previously. You can refine or add to the group using Filters or simply select the status of the users you want the email to go to. For any of these emails, you can CC the group's manager or managers. You can also add users manually to this target group.

4. Create and Launch a Simulation

Select a template and create a phishing simulation to test users' Security Awareness

- **Browse the full template library (Optional)**
  Click on Phishing Templates under Phishing Simulator. Choose Standard Templates and browser the available options. Search on category or type to review the library. This will show the available templates that you can use for your Phishing Simulation. New Templates are added every month based upon current Phishing Attacks.
- **Create a simulation (Mandatory)**
  There are five phishing simulation scenarios already created for the purpose of the PoV. To start a phishing simulation, select Simulations under Phishing Simulator. Choose any of the pre-built scenarios to get ready to launch it.
- **Add recipients (Mandatory)**
  Use the filters to determine and import your recipients list.
- **Schedule the simulation (Mandatory)**
  Determine the appropriate email delivery speed for your infrastructure. Set the time zone, the start date and time of the simulation.
- **Launch the simulation (Mandatory)**
  Validate all content and settings and launch the simulation.

Optional: For those who would like to experience the process of customizing your own phishing simulation templates, there're five trial templates available for you to do so. The following are steps for you to customize your own template.

- **Create a simulation**
  Click on Phishing Templates, and select Trial Templates. Select one of the trial templates to use and click on Create Simulation
- **Define the settings**
  Add a name and a description, then select a domain name that the email will seem to originate from, the first part of the email address to be used in the "from" email, and the first part of the email address to be used in the "reply to: field.

  The selected template's information will be already prepopulated in the email template, the landing page and the feedback page tabs. Review all content in all available languages.
- **Customize the email**
  Click on Email Template. You can use it as is, or you can edit any aspect of it up to and including the code.

  You can use the html editor and edit all aspect of the email including the code. You can automate the insertion of some information to personalize the email. Click Insert Tags then click First Name. This will insert each user's first name into the template that they receive. This increases the difficulty in detection by the user since the phishing email will be personalized and include a reference to the person by name. If you plan to send this template in multiple languages, you will need to make the same changes to each language.
- **Customize the landing page**
  This is the page the user will see if they click on the link included in the phishing email. You can edit any aspect of this page, up to and including the code or you can use as is.

In addition, the platform provides the ability to make this page look as close as possible to a real login page by allowing you to leverage a real web page to build and edit your Landing page. To do so, click on Download Website. Agree to the terms of service agreement. Then click on OK.

Type in a website that does not use Java. Then click Download. Note that when users sees this landing page and enters their information, no data is collected in the platform other than, did the user click on the link in the email to get to this page, and then did the user click on confirm, enter, login etc.

- **Customize the feedback page**
  Click on Feedback Page and then click on select a Template to preview your Feedback page options. The feedback page is where you can provide just in time hints and training to users on how they should have detected that the email was a phishing attack.

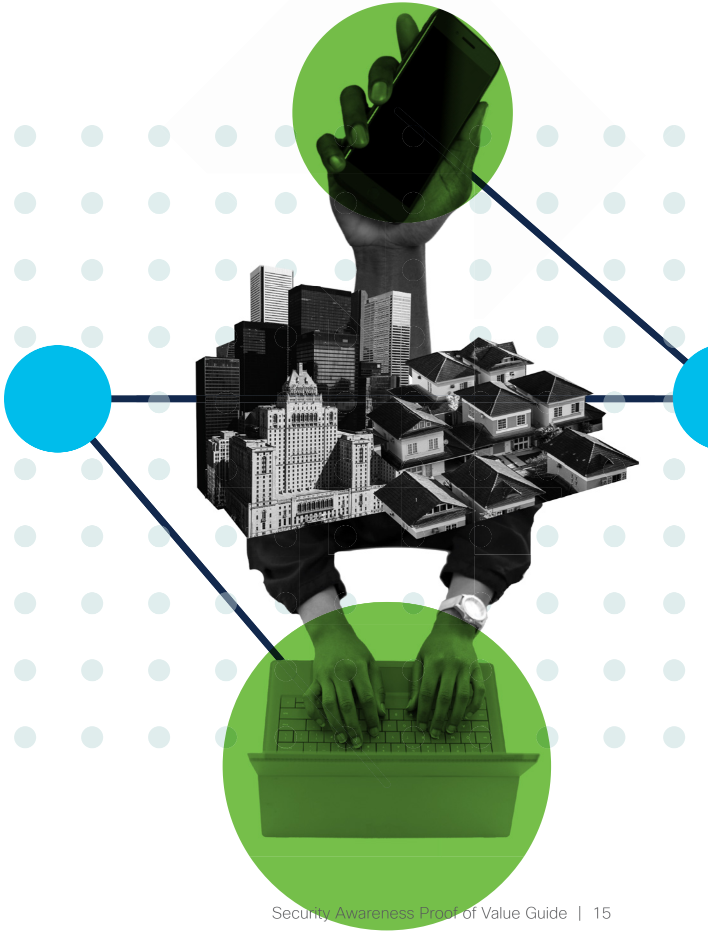
  On the right of the Feedback page, you will find additional templates that can used for when you are running a baseline simulation.

  On the selected Feedback page, click on Insert Link into Page and click on the "Please take this course" link. Users will now be able to enter a specific course from the Feedback page during a Phishing Simulation.

- Add recipients
  Use the filters to determine and import your recipients list.

- **Schedule the simulation**
  Determine the appropriate email delivery speed for your infrastructure. Set the time zone, the start date and time of the simulation.

- **Launch the simulation**
  Validate all content and settings and launch the simulation.



5. Create and View Reports

In order to report on the usage, participation rate, or success of a course, quiz or simulation, you can generate a report from the list of standard reports provided in the platform. You can also view phishing simulation results from the dashboard.

- **View the phishing simulation results (Mandatory)**
  Go to Dashboards under Phishing Simulator. View simulation summary and simulation details to understand the end user behavior.
- **Export the phishing simulation results (Optional)**
  Go to Dashboards under Phishing Simulator. Export results to pdf file for further processing.
- **Select a standard report to report on courses (Mandatory)**
  Go to the Analytics section and select Standard Reports. Select one from the Courses section, for example Status by Course, or from the quiz section select Quiz Summary.
- Select the course you would like to open on (Mandatory)
- **Format your report (Optional)**
  Select the columns, the order and the sorting mechanism.
- Click on view to preview the report (Mandatory)
- Save the report (Optional)
- Download the report as xls or csv for further data processing (Optional)