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Brief instructions for using the manager platform

Enter your key data

1. You will now reach the start page, which gives you a general overview of the various aspects of our IT security training.
2. Start configuring the training by clicking on **Base data**.
   a. Enter your company's contact data in the section **Company**.
   b. Under the menu item **Data security** you can download the template for the contract for order-related processing of personal data. Please fill out the contract completely and upload the signed template afterwards.
   c. You can find the template for the list of your employees' user data under the item **Users**. Enter the contact details of your employees in the Excel template for user data and make sure to fill in the given fields correctly. Before you upload the file, please check if there are duplicate e-mail addresses or empty fields to avoid subsequent error messages.

Phishing simulation & E-Learning configuration

1. the **Simulation** tab contains everything necessary to organize the phishing campaign.
   a. First, you have to define the time span in which the simulation should run. To do so, enter the desired starting date in the menu item **Timing**.
   b. Then, select an **industry package**. Click on "Next" to get an overview of the contained e-mails or select the menu item "templates" directly. Under Preview you can see what exactly your employees will see when they click on an element in the e-mail. Please select at least 12 of the suggested e-mails.
   c. If you click the menu item **Whitelisting** you will find instructions for performing the whitelisting. This is an essential step in setting up the simulation. Therefor it is highly advisable to test this. Our platform offers an integrated tool for this purpose.
   d. Under **Summary**, you can see an overview of all the settings you have made for the simulation.
2. The **E-Learning** tab lets you select and configure the basic settings of the e-learning modules that should be available to your employees.

a. First select start and end time and some basic settings for the e-learning in the menu item **Options**. For example, you can determine whether the tracking should be person-specific, i.e. whether the results and progress of the e-learning are to be made available in a personalized or anonymous form.
b. The menu item **Modules** lets you control which e-learning modules will be available to your employees.
c. Verify your settings under **Summary**.

Control & Reporting

1. The **Control** tab contains everything necessary for the general administration of your campaign. You can start or stop the campaign at any time under the item **De/Activate**.
2. under the menu item **Reporting** you can access your reporting dashboard, where you can always see the click rates of the simulation and the progress of the e-learning.
3. Finally, you can always give us feedback, download additional instructions and communication templates or contact us (preferably by e-mail to support@securepoint.de) should you ever need help.