

Background Info

The approval workflow idea is based on the 4-eyes principle when creating a new campaign: a campaign administrator will be responsible for creating a specific phishing or e-learning campaign. But he will only be able to start the campaign after a different user (the supervisor) reviewed the campaign and approved it. If the supervisor rejects the campaign a ticket with an expiry date will be created within the campaign for the administrator.

Configuration

1. create a user with the "user" role. You don't need to assign any special rights here.

Support

Email

support@lucysecurity.com

Country Code

Please select...

Phone

Two-Factor Authentication is not configured.

Name

Support

Role

Supervisor

Change Password

Current Certificate

N/A

☐ Certificate Required

Permissions

☐ Access All Campaigns

☐ Create/Delete Campaigns

☐ Save Campaign As Template

☐ Scenario Templates

☐ Campaign Templates

☐ Awareness Templates

☐ File Templates

☐ Not Found Template

☐ Report Templates

2. create a supervisor with "supervisor" role and assign the "user" as a supervised user

- ☐ Advanced Settings
- ☐ Performance Test
- ☐ Test email
- ☐ Spam Test
- ☐ System Monitoring
- ☐ System Status Page
- ☐ Incident Management
- ☐ Plugin configuration
- ☐ Incident Management Configuration
- ☐ Manual
- ☐ Exports
- ☐ Invoices
- ☐ Send Logs
- ☐ Service Logs
- ☐ Changelog

Supervised Users

- ☒ User

A blue rectangular button with the word "Save" in white text.

- add both "user" and "supervisor" to the same campaign. The "user" should have at least "start/stop campaign" permissions. If the user needs to configure the campaign he also needs configuration access as well), the "supervisor" can have full permissions set for the campaign.

Lucy Phishi...

Campaign Status Not Started

Results

- Summary
- Statistics
- Reports
- Exports

Configuration

- Base Settings
- Awareness Settings
- Schedule
- Recipients

Advanced Settings

- User Settings
- Custom Fields
- Reminders

User test

- Permissions
- ☐ Select All
 - ☒ Start/Stop Campaign
 - ☒ Configure Campaign Settings
 - ☐ Delete Campaign
 - ☐ Edit Recipients
 - ☐ Edit Awareness Website
 - ☐ Edit Schedule
 - ☐ Edit Base Scenario Settings
 - ☐ Edit Scenario Settings
 - ☐ Edit scenario landing page
 - ☐ Edit Scenario Message
 - ☒ Create/View Reports
 - ☒ Export to File
 - ☐ Export to Group
 - ☐ Campaign Full Statistics
 - ☒ Campaign Basic Statistics
 - ☐ Reset Stats
 - ☐ Access Message Log
 - ☐ Supervision Log
 - ☐ Reminders

Save

Lucy Phishi...

Campaign Status

Waiting

Results

- Summary
- Statistics
- Reports
- Exports

Configuration

- Base Settings
- Awareness Settings
- Schedule
- Recipients

Advanced Settings

- User Settings
- Custom Fields
- Reminders

User

test

Permissions

- ☒ Select All
- ☒ Start/Stop Campaign
- ☒ Configure Campaign Settings
- ☒ Delete Campaign
- ☒ Edit Recipients
- ☒ Edit Awareness Website
- ☒ Edit Schedule
- ☒ Edit Base Scenario Settings
- ☒ Edit Scenario Settings
- ☒ Edit scenario landing page
- ☒ Edit Scenario Message
- ☒ Create/View Reports
- ☒ Export to File
- ☒ Export to Group
- ☒ Campaign Full Statistics
- ☒ Campaign Basic Statistics
- ☒ Reset Stats
- ☒ Access Message Log
- ☒ Supervision Log
- ☒ Reminders

Save

Home / Campaigns / Lucy Phishing Campaign (2) / User Settings

Lucy Phishi...

Campaign Status Not Started

+ Add User

Results

Summary

Statistics

Reports

Exports

Name	Role	All Campaigns Access
test	View	-
Support	Supervisor	-

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Configuration

Base Settings

Awareness Settings

Schedule

Recipients

Advanced Settings

User Settings

Custom Fields

Reminders

3. If the campaign admin will log in under his "user" role and starts the campaign it will be put on hold, until "supervisor" approves the launch. On this step, you can see a new entry created on "Supervision Log". Within the campaign dashboard, you will also see a small turning wheel that indicates that the campaign is waiting for approval

Campaign will be started after supervisor approval.

Reset Stats

Report


Export

ing Time

Created By

Home / Campaigns

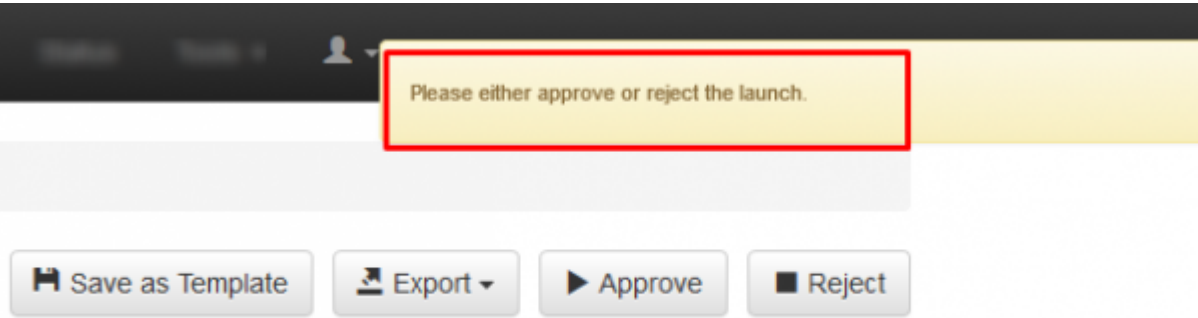
Campaigns

	Campaign	Started	Stopped	Sent	Clicked	Success
<input type="checkbox"/>	tes 	-	-	0	0	0

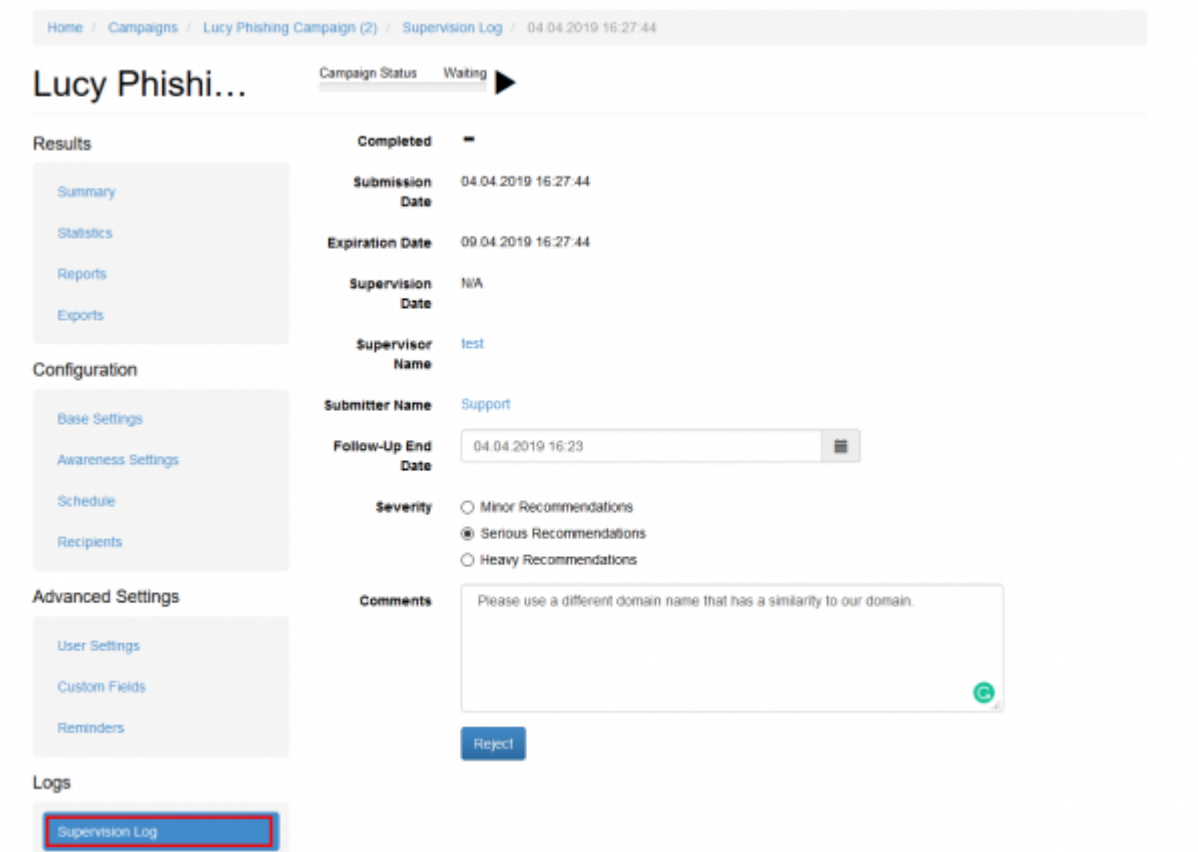
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4. If the supervisor now logs in under his "supervisor" role and navigates to the same campaign he will be able to either reject or approve the campaign by clicking on the according to buttons:



If the supervisor rejects the campaign he will be able to create a ticket with an end date and severity that allows him to communicate the required changes:



In case of a rejected campaign the campaign admin with his "user" role will be able to see the desired changes within the supervision log:

Home / Campaigns / Lucy Phishing Campaign (2) / Supervision Log

Lucy Phishi...

Campaign Status Not Started ▶

Results

Summary

Statistics

Reports

Exports

Configuration

Base Settings

Awareness Settings

Schedule

Recipients

Advanced Settings

User Settings

Custom Fields

Reminders

Logs

Supervision Log

Submitted	Supervised	Submitter Name	Supervisor Name	Completed
04.04.2019 16:18:15	04.04.2019 16:19:35	Support	SupportTest	Rejected

< 1 >

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Home / Campaigns / Lucy Phishing Campaign (2) / Supervision Log / 04.04.2019 16:18:15

Lucy Phishi...

Campaign Status Waiting ▶

Results

Summary

Statistics

Reports

Exports

Configuration

Base Settings

Awareness Settings

Schedule

Recipients

Advanced Settings

User Settings

Custom Fields

Reminders

Logs

Supervision Log

Completed

✓

Status

Rejected

Submission Date

04.04.2019 16:18:15

Expiration Date

09.04.2019 16:18:15

Supervision Date

04.04.2019 16:19:35

Supervisor Name

SupportTest

Submitter Name

Support

Severity

Serious Recommendations

Comments

Please use a different domain name that has a similarity to our domain.

Once the changes have been done the step 4 can be repeated again until the supervisor approves the campaign

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