

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.

Home / Users / user

user

E-mail

user@user.com

Phone

Name

user

Role

User

Change Password

Current Certificate

N/A

Certificate Required

Permissions

☐ Access All Campaigns

☐ Scenario Templates

☐ Awareness Templates

☐ Clients

☐ User Management

☐ Performance Test

☐ Send Logs

☐ SSH Access

☐ Create/Delete Campaigns

☐ File Templates

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

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- ☐ Benchmark Sectors
- ☐ License
- ☐ Update
- ☐ Reboot
- ☐ SSH Password
- ☐ Domains
- ☐ Dynamic DNS
- ☐ Advanced Settings
- ☐ Test Email
- ☐ Spam Test
- ☐ System Status Page
- ☐ Changelog
- ☐ Recipients
- ☐ Service Logs
- ☐ System Monitoring

Supervised Users☒ user

1. 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.

Home / Campaigns / test / User Settings / user

test

Campaign Status: Not Started

Summary

User Settings

Statistics

Recipients

Base Settings

Custom Fields

Schedule

Awareness

Reports

Supervision Log

Message Log

Errors

User

user

Permissions

☐ Select All

☒ Start/Stop Campaign

☒ Configure Campaign Settings

☐ Delete Campaign

☐ Create/View Reports

☐ CSV Export

☐ Export Succeeded Recipients

☐ Campaign Statistics

☐ Edit Recipients

☐ Edit Awareness Website

☐ Edit Schedule

☐ Access Message Log

☐ Create/Delete Scenarios

☐ Edit Scenario Base Settings

☐ Edit Scenario Landing

☐ Edit Scenario Message

☐ Reset Stats

Save

Lucy

Campaigns

Recipients

Sessions

Settings

Support

Status

Account

Logout

Home

Campaigns

test

User Settings

supervisor

test

Campaign Status: Not Started

Summary

User Settings

Statistics

Recipients

Base Settings

Custom Fields

Schedule

Awareness

Reports

Supervision Log

Message Log

Errors

User

supervisor

Permissions

☒ Select All

☒ Start/Stop Campaign

☒ Configure Campaign Settings

☒ Delete Campaign

☒ Create/View Reports

☒ CSV Export

☒ Export Succeeded Recipients

☒ Campaign Statistics

☒ Edit Recipients

☒ Edit Awareness Website

☒ Edit Schedule

☒ Access Message Log

☒ Create/Delete Scenarios

☒ Edit Scenario Base Settings

☒ Edit Scenario Landing

☒ Edit Scenario Message

☒ Reset Stats

Save

Lucy

Campaigns

Recipients

Sessions

Settings

Support

Status

Account

Logout

Home

Campaigns

test

User Settings

test

Campaign Status: Not Started

+ Add User

| Name | Role | All Campaigns Access | |
|------------|------------|----------------------|---|
| supervisor | Supervisor | - | ✕ |
| user | User | - | ✕ |

<1>

10

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

The screenshot shows the Lucy Campaigns dashboard. At the top, a navigation bar includes 'Lucy', 'Campaigns', 'Support', 'Account', and 'Logout'. A yellow notification box in the top right corner states: 'Campaign will be started after supervisor approval.' Below the navigation bar, the breadcrumb trail is 'Home / Campaigns / test'. The main heading is 'test', and the 'Campaign Status' is 'Waiting'. On the left, a sidebar menu contains 'Summary', 'Base Settings', 'Custom Fields', and 'Supervision Log'. The main content area displays three circular progress indicators: '0 messages sent', '0% of recipients clicked the link', and '0% of attacks are successful'. Below this, a table lists campaigns. The first row shows a campaign named 'test' with a status icon (a circle with a dot) highlighted by a red box. The table columns are 'Campaign', 'Started', 'Stopped', 'Sent', 'Clicked', 'Success', and an action column with a red 'X' icon. At the bottom, there are pagination controls showing '1' and a dropdown menu set to '10'.

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 buttons:

The screenshot shows the Lucy Campaigns dashboard for a supervisor. The navigation bar is the same. A yellow notification box in the top right corner states: 'Please either approve or reject the launch.' Below the navigation bar, the breadcrumb trail is 'Home / Campaigns / test'. The main heading is 'test', and the 'Campaign Status' is 'Waiting'. On the right side, there are buttons for 'Reset Stats', 'Report', 'Export', and 'Approve' and 'Reject', with the 'Approve' and 'Reject' buttons highlighted by a red box. The main content area displays three circular progress indicators: '0 messages sent', '0% of recipients clicked the link', and '0% of attacks are successful'. Below this, a table lists campaigns. The first row shows a campaign named 'test' with a status icon (a circle with a dot) highlighted by a red box. The table columns are 'Campaign', 'Started', 'Stopped', 'Sent', 'Clicked', 'Success', and an action column with a red 'X' icon. At the bottom, there are pagination controls showing '1' and a dropdown menu set to '10'.

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

test

Campaign Status: Waiting

Summary

Statistics

Recipients

Base Settings

Custom Fields

Schedule

Awareness

Reports

Supervision Log

Message Log

Completed

Submission Date

Expiration Date

Supervision Date

Supervisor Name

Submitter Name

Follow-Up End Date

Severity

Comments

07.09.2016 15:17:21

12.09.2016 15:17:21

N/A

supervisor

user

14.09.2016 18:36

Minor Recommendations

Serious Recommendations

Heavy Recommendations

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

b) Make sure the users gets redirected to an awareness site before he submits the password

Reject

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:

Lucy Campaigns Support Account Logout

Home / Campaigns / test / Supervision Log

test

Campaign Status: Not Started

Summary

Base Settings

Custom Fields

Supervision Log

| Submitted | Supervised | Submitter Name | Supervisor Name | Completed |
|------------------|------------------|----------------|-----------------|-----------|
| 07.09.2016 15:17 | 07.09.2016 15:22 | user | supervisor | Rejected |

< 1 >

10

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Lucy

Campaigns

Support

Account

Logout

Home / Campaigns / test / Supervision Log / 07.09.2016 15:17:21

test

Campaign Status: Not Started

Summary

Base Settings

Custom Fields

Supervision Log

Completed

Status

Submission Date

Expiration Date

Supervision Date

Supervisor Name

Submitter Name

Severity

Comments

✓

Rejected

07.09.2016 15:17:21

12.09.2016 15:17:21

07.09.2016 15:22:26

supervisor

user

Serious Recommendations

a) Please use a different domain name that has a similarity to our domain b) Make sure the users gets redirected to an awareness site before he submits the password

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

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