

## 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 / Support

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

|                                     |  |
|-------------------------------------|--|
| <input type="checkbox"/>            | Advanced Settings                        |
| <input type="checkbox"/>            | Performance Test                         |
| <input type="checkbox"/>            | Test email                               |
| <input type="checkbox"/>            | Spam Test                                |
| <input type="checkbox"/>            | System Monitoring                        |
| <input type="checkbox"/>            | System Status Page                       |
| <input type="checkbox"/>            | Incident Management                      |
| <input type="checkbox"/>            | Plugin configuration                     |
| <input type="checkbox"/>            | Incident Management Configuration        |
| <input type="checkbox"/>            | Manual                                   |
| <input type="checkbox"/>            | Exports                                  |
| <input type="checkbox"/>            | Invoices                                 |
| <input type="checkbox"/>            | Send Logs                                |
| <input type="checkbox"/>            | Service Logs                             |
| <input type="checkbox"/>            | Changelog                                |
| <b>Supervised Users</b>             | <input checked="" type="checkbox"/> User |
| <input type="button" value="Save"/> |  |

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.

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       | x |

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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:

Home / Campaigns / test

Please either approve or reject the launch.

Save as Template

Export

Approve

Reject

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:

Home / Campaigns / Lucy Phishing Campaign (2) / Supervision Log / 04.04.2019 16:27:44

Lucy Phishi...

Campaign StatusWaiting

Results

Summary

Statistics

Reports

Exports

Configuration

Base Settings

Awareness Settings

Schedule

Recipients

Advanced Settings

User Settings

Custom Fields

Reminders

Logs

Supervision Log

Completed-

Submission Date04.04.2019 16:27:44

Expiration Date09.04.2019 16:27:44

Supervision DateN/A

Supervisor Nametest

Submitter NameSupport

Follow-Up End Date04.04.2019 16:23

Severity

Minor Recommendations

☒ Serious Recommendations

Heavy Recommendations

Comments

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

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:

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  |

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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.

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

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