

GETTING STARTED



Please watch the video below for a full overview.





IMPORTING LEARNERS

Adding new learners to the platform is super easy, and we've got a few options available depending on your preference.

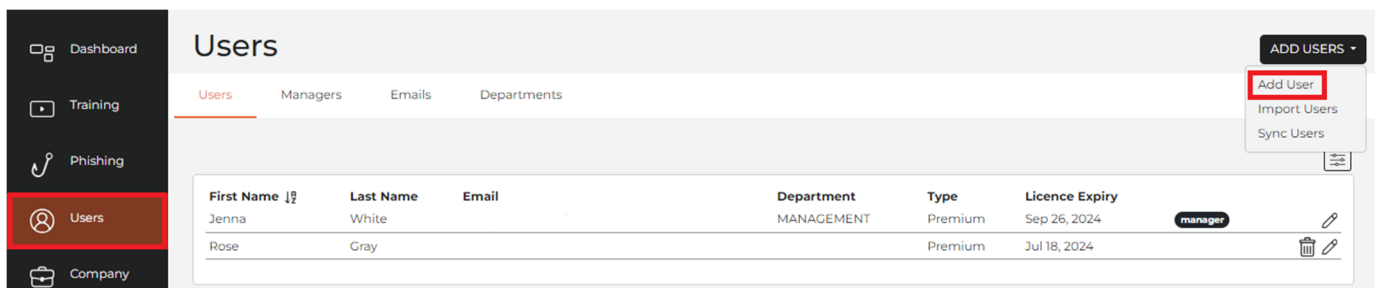
To get started importing your learners follow these easy steps:

- Login and access your '**Admin dashboard**'
- Navigate to the '**Users**' section,
- Click on the '**Add Users**' button located top right corner. Managers will have the choice to:

How to Add Learners Manually:

To begin, follow these easy steps:

- Navigating to the '**Users**' section
- Click the '**Add Users**' button located in the top right corner
- Select '**Add User**'.
- Provide Information for the learner
- Click '**Save**'.



First Name	Last Name	Email	Department	Type	Licence Expiry	
Jenna	White		MANAGEMENT	Premium	Sep 26, 2024	manager
Rose	Gray			Premium	Jul 18, 2024	





Add a user CANCEL SAVE

User

First name

Last name

Email

Department

NONE SELECT A DEPARTMENT CREATE A DEPARTMENT

How To Import Learners via CSV

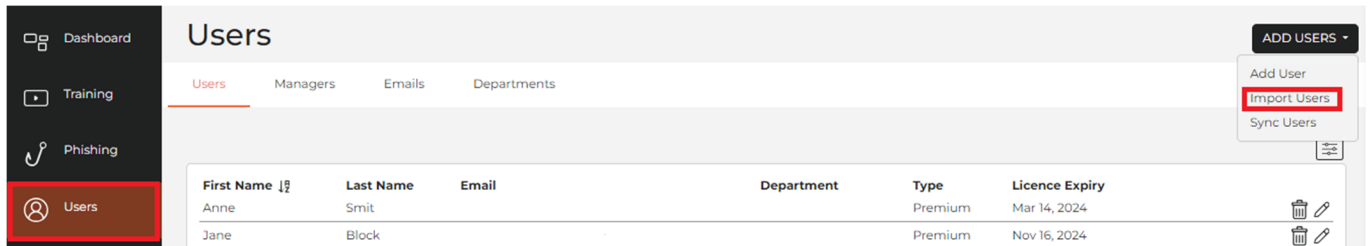
Here are the recommended fields to include in your CSV file:

1. First names of learners
2. Last names of learners
3. Company email addresses
4. Departments

To begin, follow these easy steps:

- Navigate to the **'Users'** section.
- Click **'Add Users'** button located in the top right corner.
- Select **'Import Users'**.
- Click **'Load Users From File'**.
- Choose your **CSV file** and click **'Complete Upload'**.





Users

ADD USERS ▾

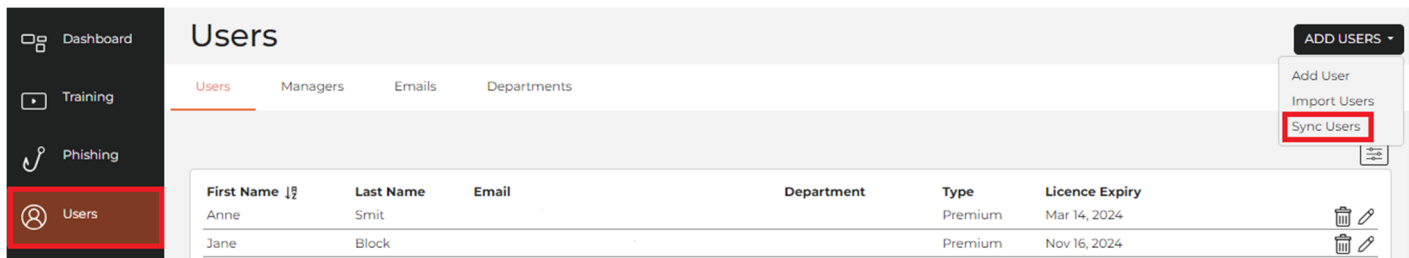
- Add User
- Import Users**
- Sync Users

First Name ↑	Last Name	Email	Department	Type	Licence Expiry
Anne	Smit			Premium	Mar 14, 2024
Jane	Block			Premium	Nov 16, 2024

Syncing Learners by Active Directory

To begin, follow these easy steps:

- Navigate to the '**Users**' section.
- Click the '**Add Users**' button located in the top right corner.
- Select '**Sync Users**'.



Users

ADD USERS ▾

- Add User
- Import Users
- Sync Users**

First Name ↑	Last Name	Email	Department	Type	Licence Expiry
Anne	Smit			Premium	Mar 14, 2024
Jane	Block			Premium	Nov 16, 2024

New Learner Onboarding Notifications

First-time learners on the platform will receive two emails to their mailboxes from app@goldphish.com.

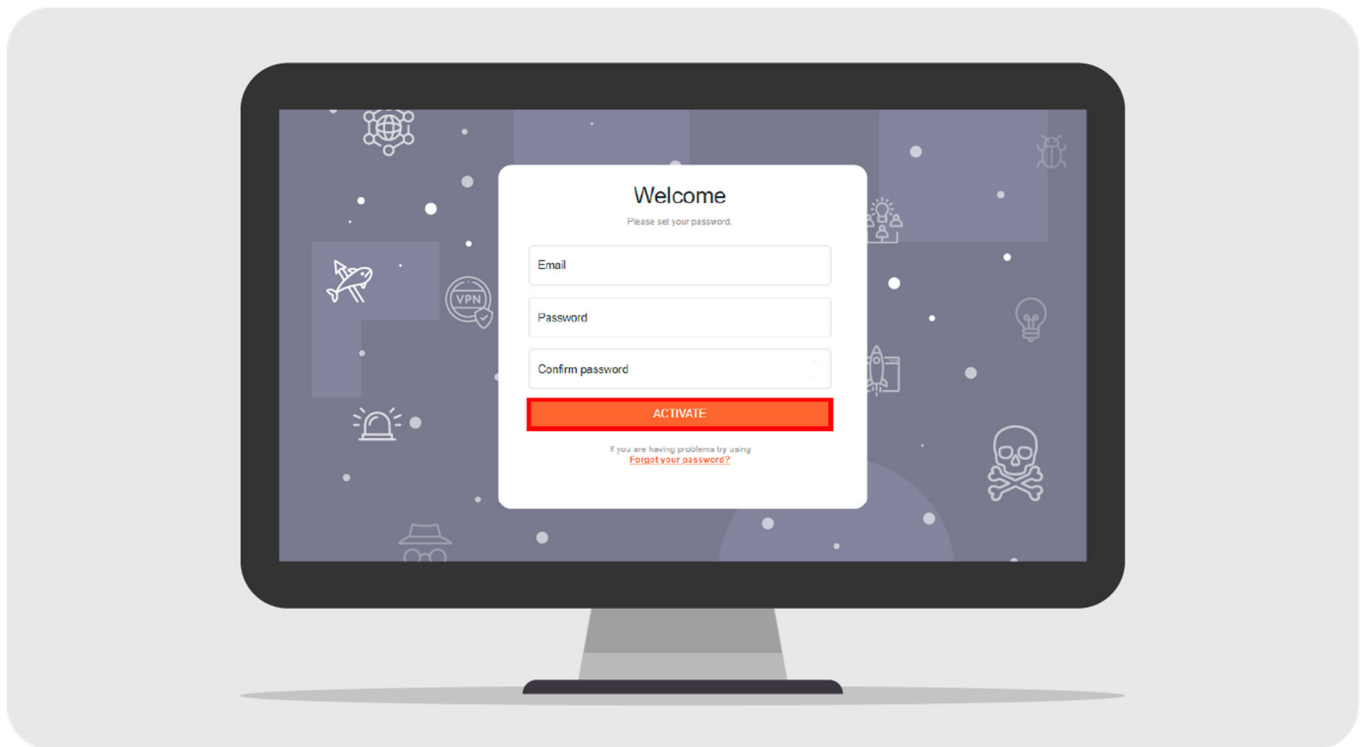
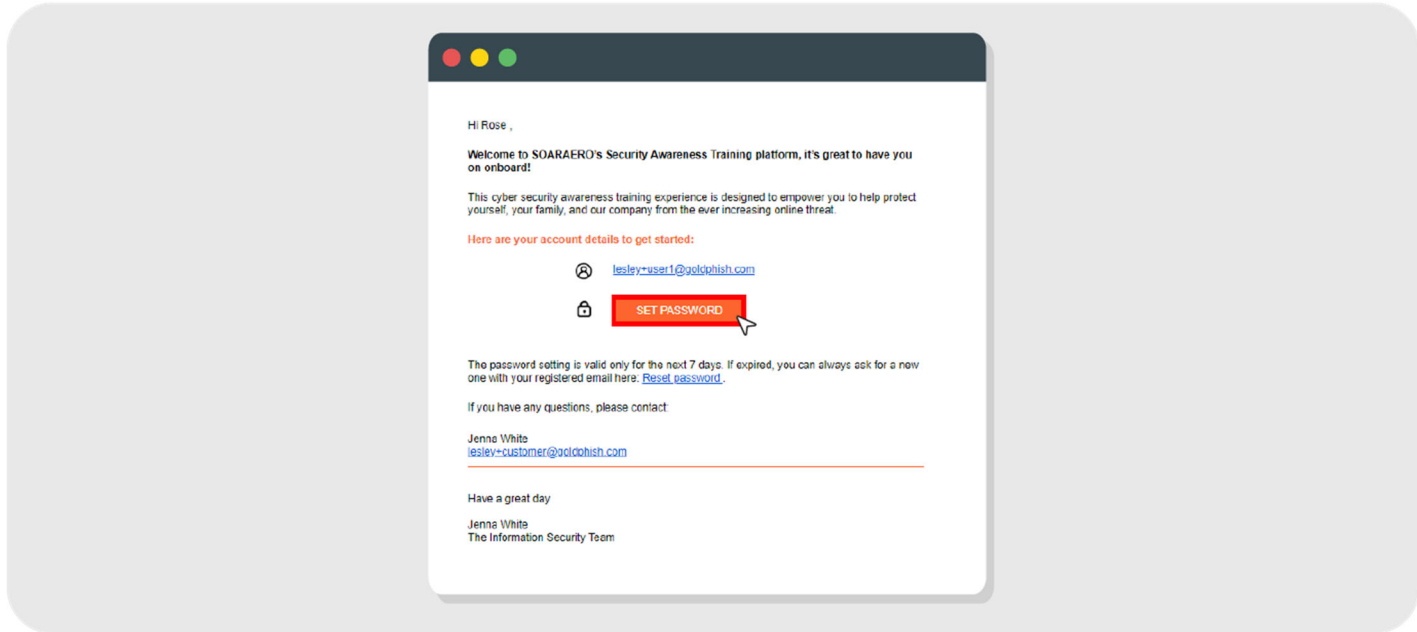
1. The first is an automated onboarding welcome email, containing their **Username** and a '**Set password**' link (or "token") to the platform to get started with their training program.



GETTING STARTED



2. The second is a 'New Training Notification' email that notifies the learner that new training has been assigned to them by their manager.





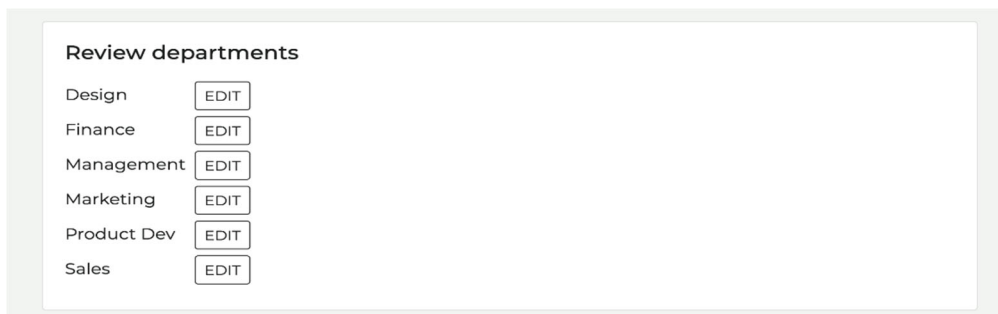
CREATING DEPARTMENTS

How To Create Departments:

Managers will have the choice to:

1. Include department names on the CSV file:

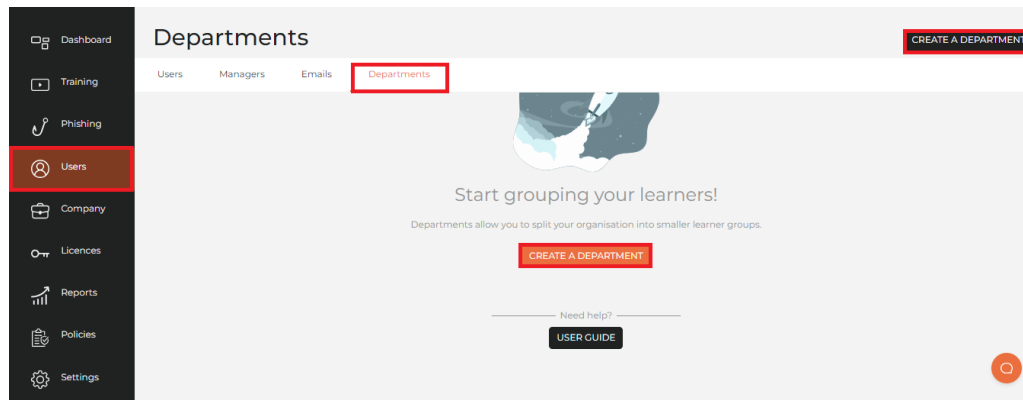
- Our handy import tool will automatically create the departments for you when importing learners.
- Check the spelling of department names is accurate.
- Select '**Complete Upload**' to finalise the process.



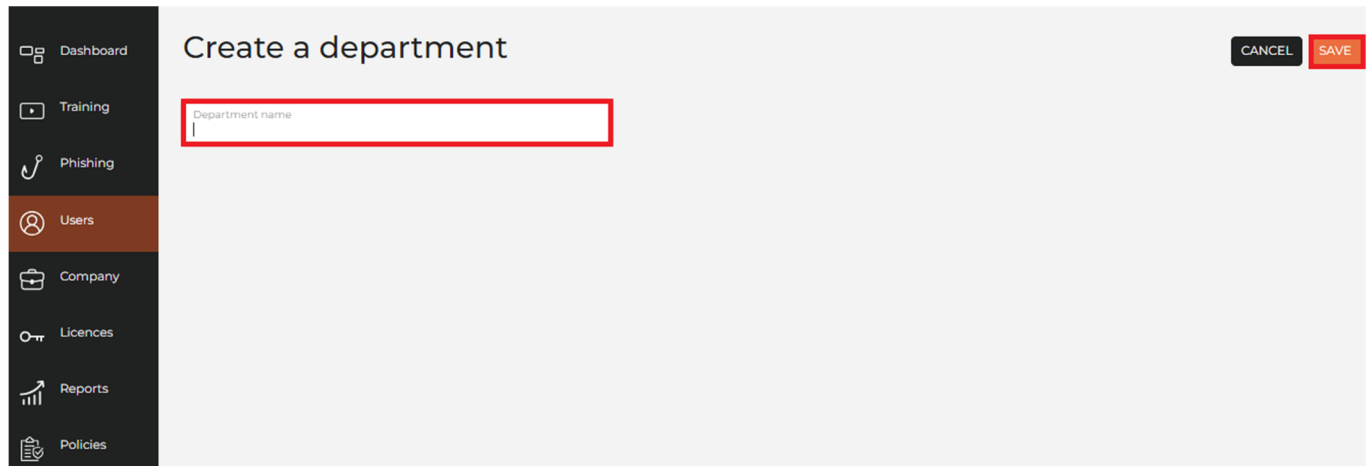
2. Manual Department Creation:

- Navigate to the '**User**' section.
- Select the '**Departments**' tab.
- Click the '**Create a Department**' button in the top right.





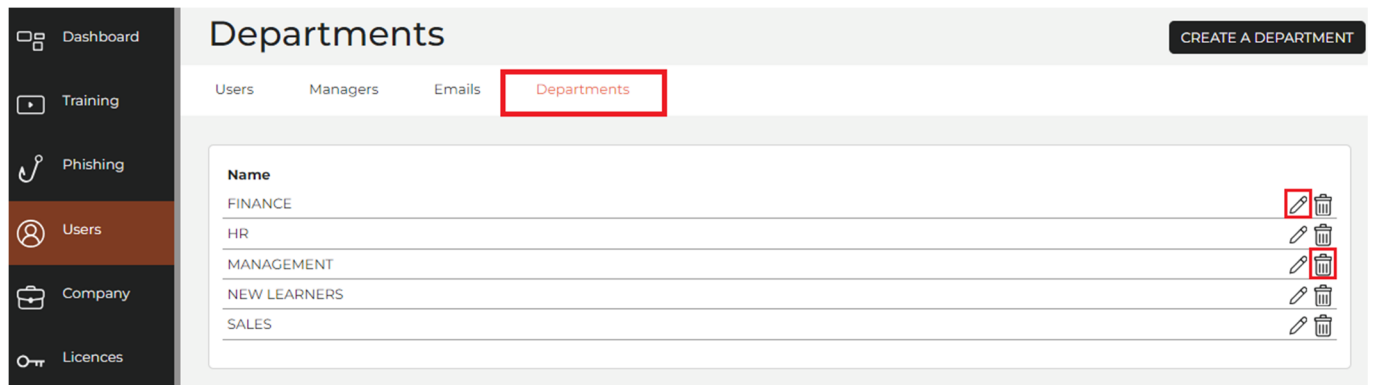
- Name the Department
- Click ' Save'



How To Edit Departments:

- Navigate to the '**User**' section.
- Select the '**Departments**' tab.
- Locate the Department
- Click the '**Pencil**' icon to 'Edit' and '**Save**'.
- Click on the '**Bin**' icon if you wish to '**Delete**' a department.















Departments

CREATE A DEPARTMENT

Users Managers Emails **Departments**

Name	
FINANCE	 
HR	 
MANAGEMENT	 
NEW LEARNERS	 
SALES	 



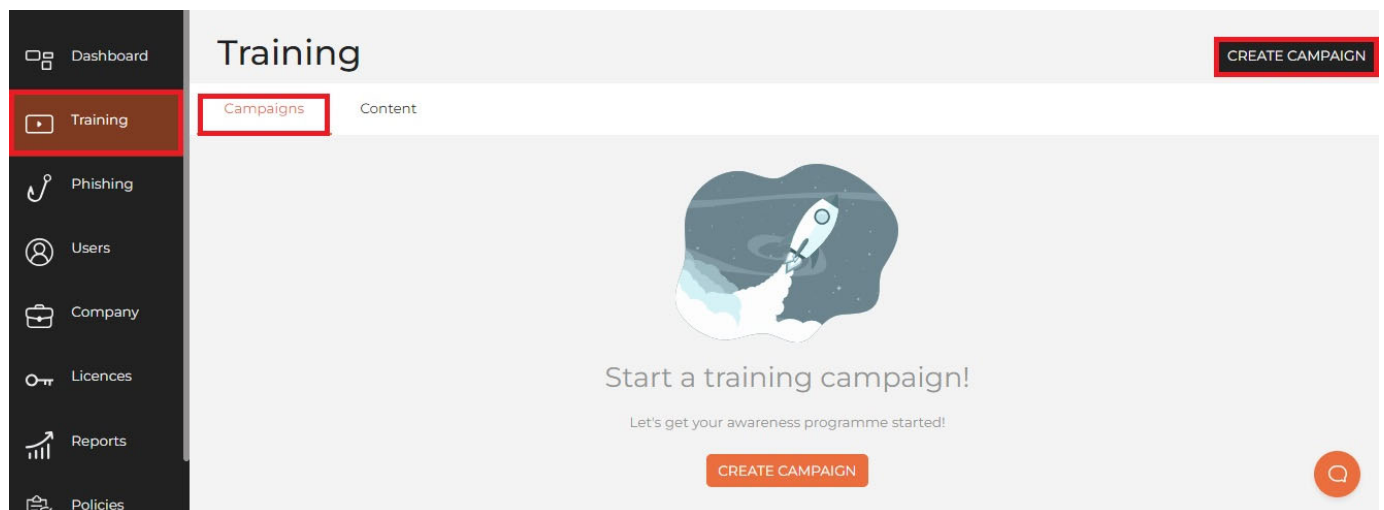


How to Create a Training Campaign

Follow these five simple steps to get started:

Step 1. Create Campaign

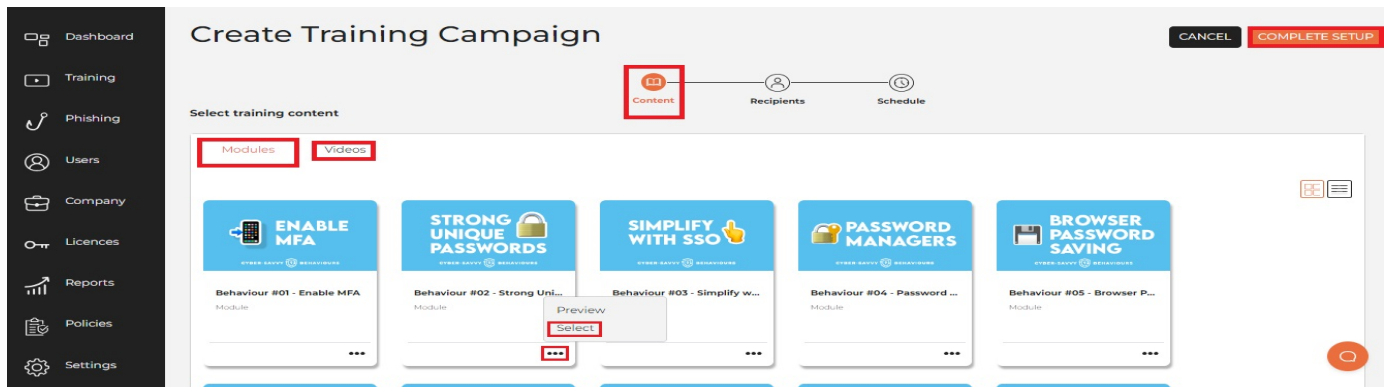
- Login into your Admin dashboard.
- Navigate to the '**Training**' section.
- Select the top '**Campaigns**' tab
- Click '**Create Campaign**'.



Step 2. Select the Training Content

- Choose training content to include in your campaign, such as interactive eLearning '**Modules**' and short animation '**Videos**'.
- Navigate to the '**Template**' card and click on the ellipsis menu ('**3 dots**').
- '**Preview**' the available training content before making your selection.
- Click '**Select**'.



Step 3. Choose your Recipients

- Choose to Target 'Everyone', 'Specific Departments', or 'Specific Learners'.



Step 4. Set a Schedule

- Click the 'Calendar' icon icon to select the campaign start date.
- Set the campaign 'Duration' and use the dropdown menu to customise according to your preferences.






Step 5. Complete Setup

- Select the **'Complete Setup'** button.
- Populate the **'Campaign Name'** block field.
- Populate the **'Description block'** field.
- Click the **'Reminder'** check box for learners yet to complete their training.
- Click **'Start Campaign'** to launch.

Complete Campaign Setup
✕

Make sure you set up and test our Phish Reporter service before launching.

PHISH REPORTER

Campaign name

Training campaign 1

Description

Q1

Reminder

Send a reminder message to recipients if they have not completed the training before the campaign ends

Days before

0

Content EDIT

3 modules selected

1 video selected

Recipients EDIT

CANCEL
START CAMPAIGN

Dashboard

Training

Phishing

Users

Company

Training

Campaigns
Content
CREATE CAMPAIGN

Campaign name	Start Date ↑↓	Status	
Training campaign 1	Jun 3, 2024	Active	✕
Training campaign 2		Draft	✎ ✕



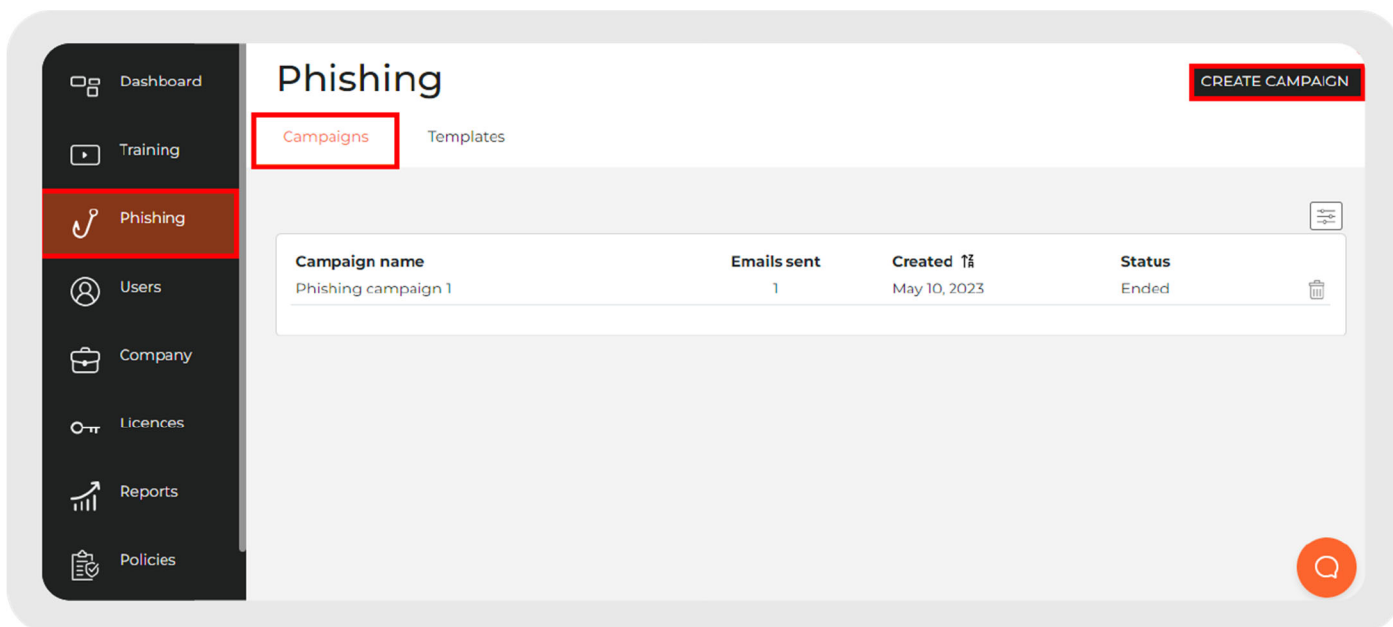


How to Create a Phishing Campaign

Follow these five simple steps to get started:

Step 1. Create Campaign

- Login into your Admin dashboard.
- Navigate to the '**Phishing**' section.
- Click '**Create Campaign**'.



The screenshot shows the RankSecure Admin dashboard. On the left is a dark sidebar with navigation items: Dashboard, Training, Phishing (highlighted), Users, Company, Licences, Reports, and Policies. The main content area is titled 'Phishing' and has two tabs: 'Campaigns' (highlighted with a red box) and 'Templates'. In the top right corner of the main area is a red 'CREATE CAMPAIGN' button. Below the tabs is a table with the following data:

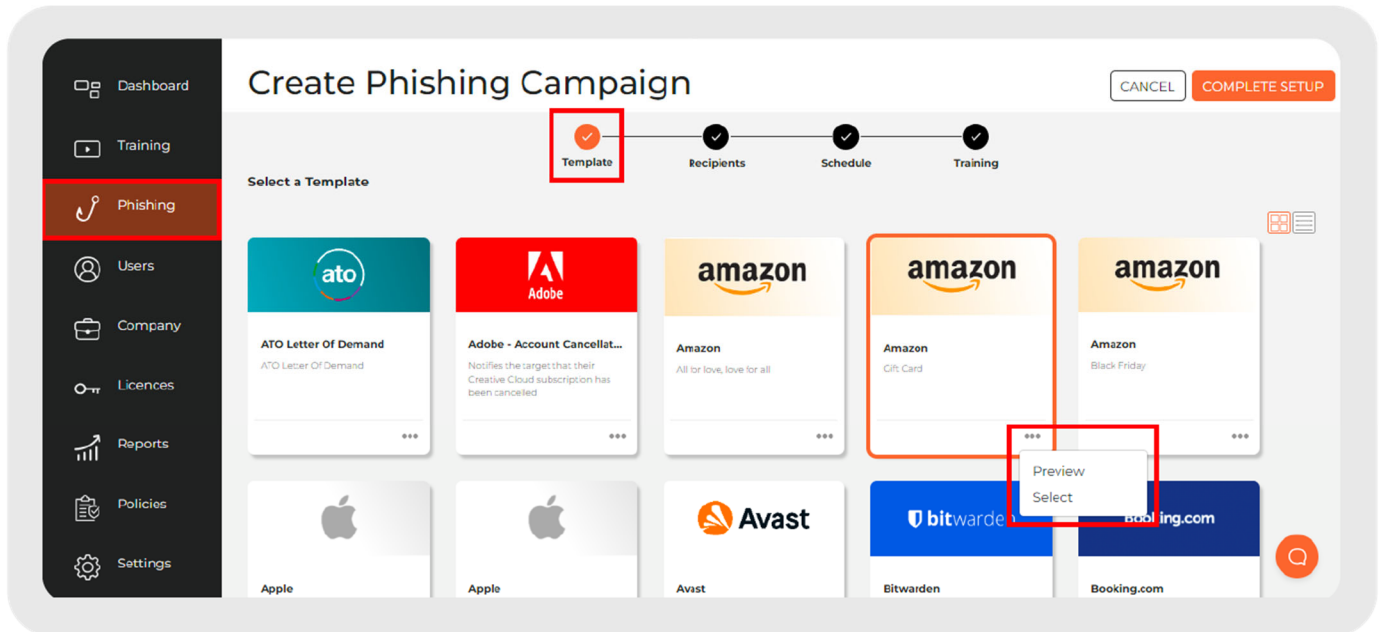
Campaign name	Emails sent	Created ↑	Status	
Phishing campaign 1	1	May 10, 2023	Ended	

There is also a red circular chat icon in the bottom right corner of the dashboard.

Step 2. Select a Template

- Choose from various email templates, including click-only experiences or spoof landing pages.
- Choose the '**Templates**' tab.
- Navigate to the template card, and click on the ellipsis menu ('**3 dots**').
- '**Preview**' the templates before making your selection.
- Click the '**Select**' option.



Create Phishing Campaign

Dashboard | Training | **Phishing** | Users | Company | Licences | Reports | Policies | Settings

Template (checked) | Recipients | Schedule | Training

Select a Template

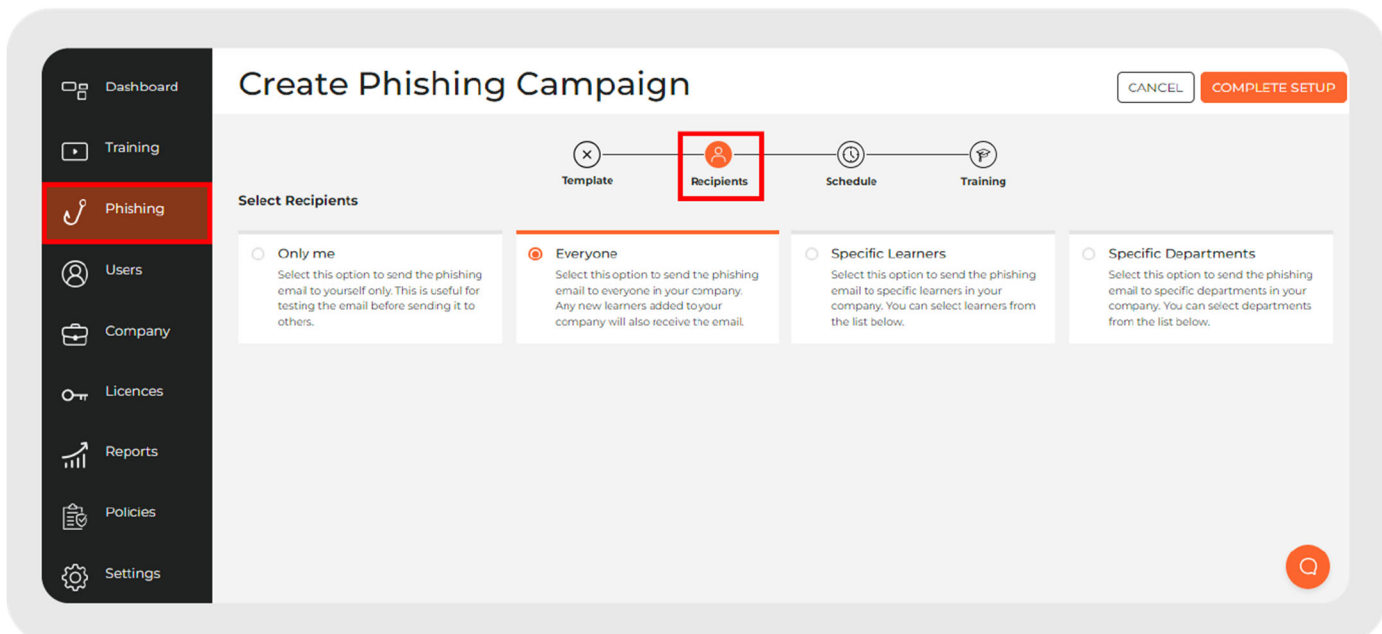
- ATO Letter Of Demand
- Adobe - Account Cancellat...
- Amazon
- Amazon Gift Card
- Amazon Black Friday
- Apple
- Apple
- Avast
- Bitwarden
- Booking.com

Preview | Select

CANCEL | COMPLETE SETUP

Step 3. Choose your Recipients

- Choose to Target **'Everyone'**, **'Specific Departments'**, or **'Specific Learners'**.



Create Phishing Campaign

Dashboard | Training | **Phishing** | Users | Company | Licences | Reports | Policies | Settings

Template | **Recipients** (checked) | Schedule | Training

Select Recipients

- Only me
Select this option to send the phishing email to yourself only. This is useful for testing the email before sending it to others.
- Everyone**
Select this option to send the phishing email to everyone in your company. Any new learners added to your company will also receive the email.
- Specific Learners
Select this option to send the phishing email to specific learners in your company. You can select learners from the list below.
- Specific Departments
Select this option to send the phishing email to specific departments in your company. You can select departments from the list below.

CANCEL | COMPLETE SETUP

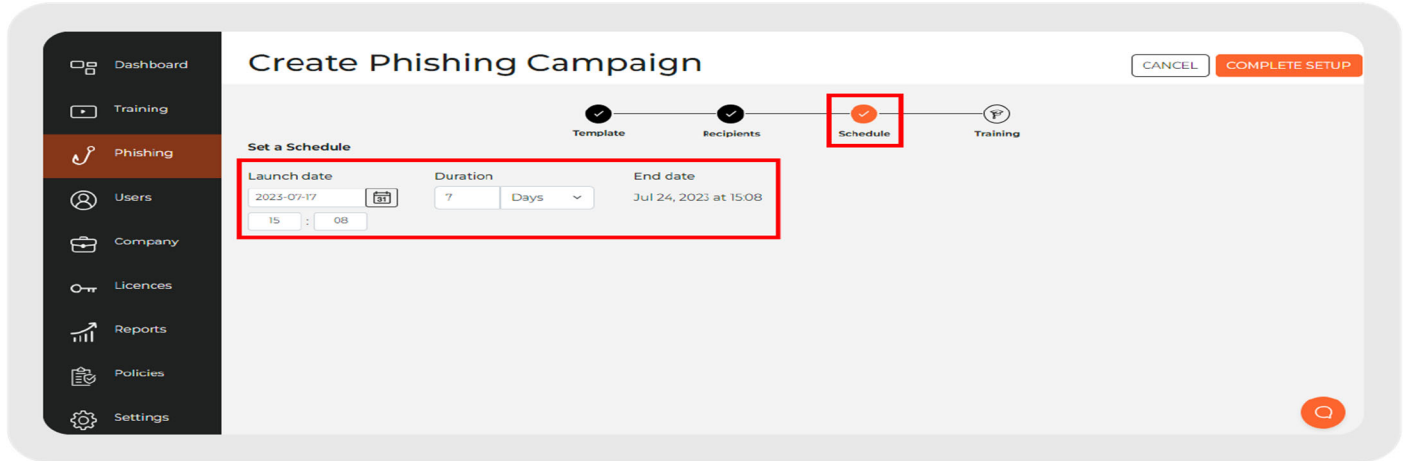
Step 3. Set a Schedule

- Click the **'Calendar'** icon icon to select the campaign start date.





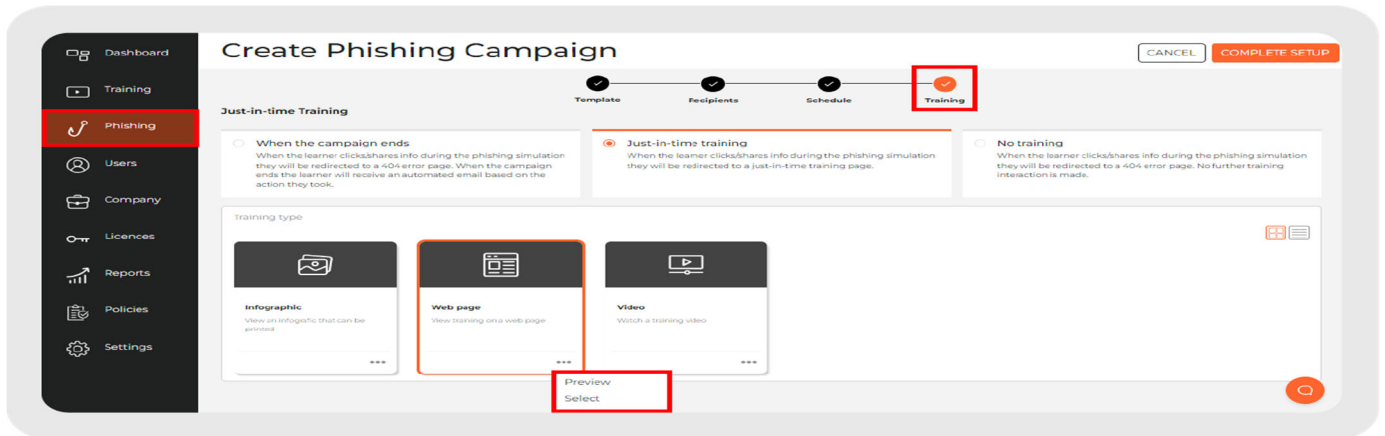
- Set the campaign '**Duration**' and use the dropdown menu to customise according to your preferences.



Step 4. Select Training Type

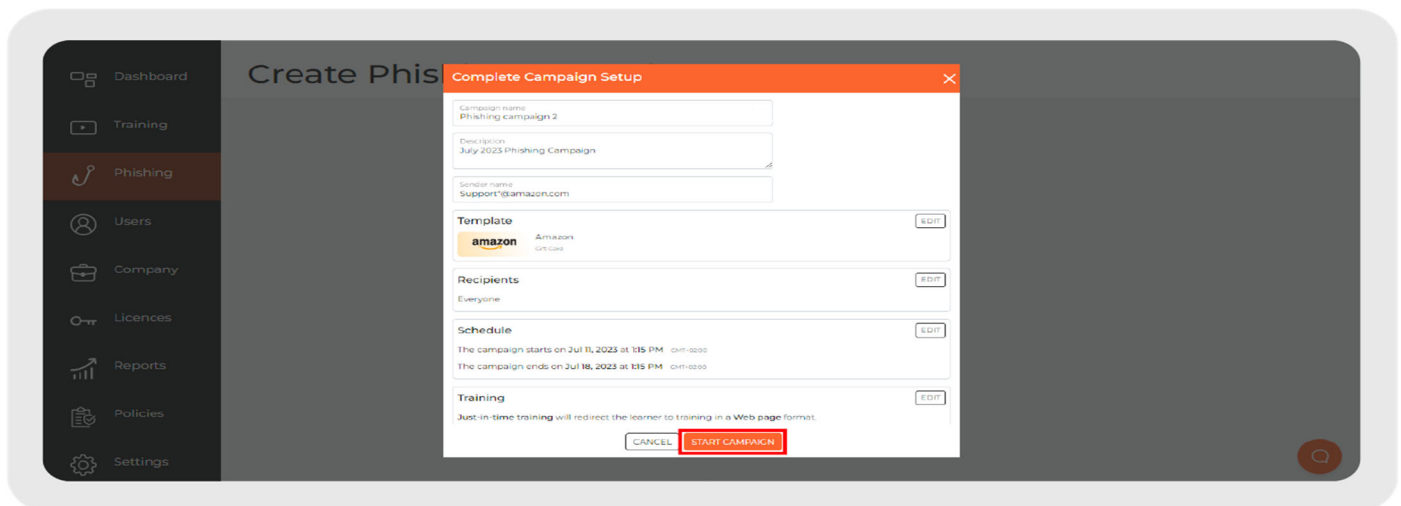
- Decide when learners should be notified about the phishing attack.
 - Choose from different Training Types based on learner responses.
1. **When the campaign ends:** When the learner clicks/shares info during the phishing simulation they will be redirected to a 404 error page. When the campaign ends the learner will receive an automated email based on their action.
 2. **Just-in-Time Training:** When the learner clicks/shares information during the phishing simulation, they will be redirected to a just-in-time training page.
 3. **No notification:** *When the learner clicks/shares information during the phishing simulation they will be redirected to a 404 error page. No further training interaction is made.*





Step 5. Complete Setup

- Select the '**Complete Setup**' button
- Populate the '**Campaign Name**' block field
- Populate '**Description block**' field
- Create a spoofed '**Sender Name**'. This will change the name displayed in the recipient's mailbox, but it will not change the actual sender's email address or domain.
- Click '**Start Campaign**' to launch.

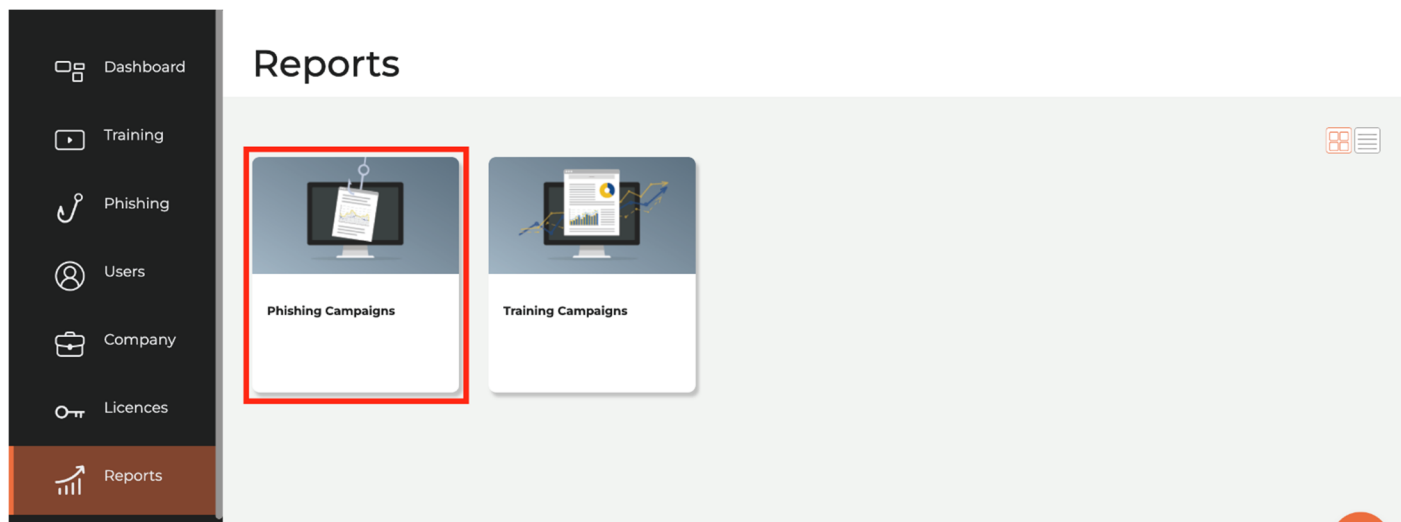




Reporting

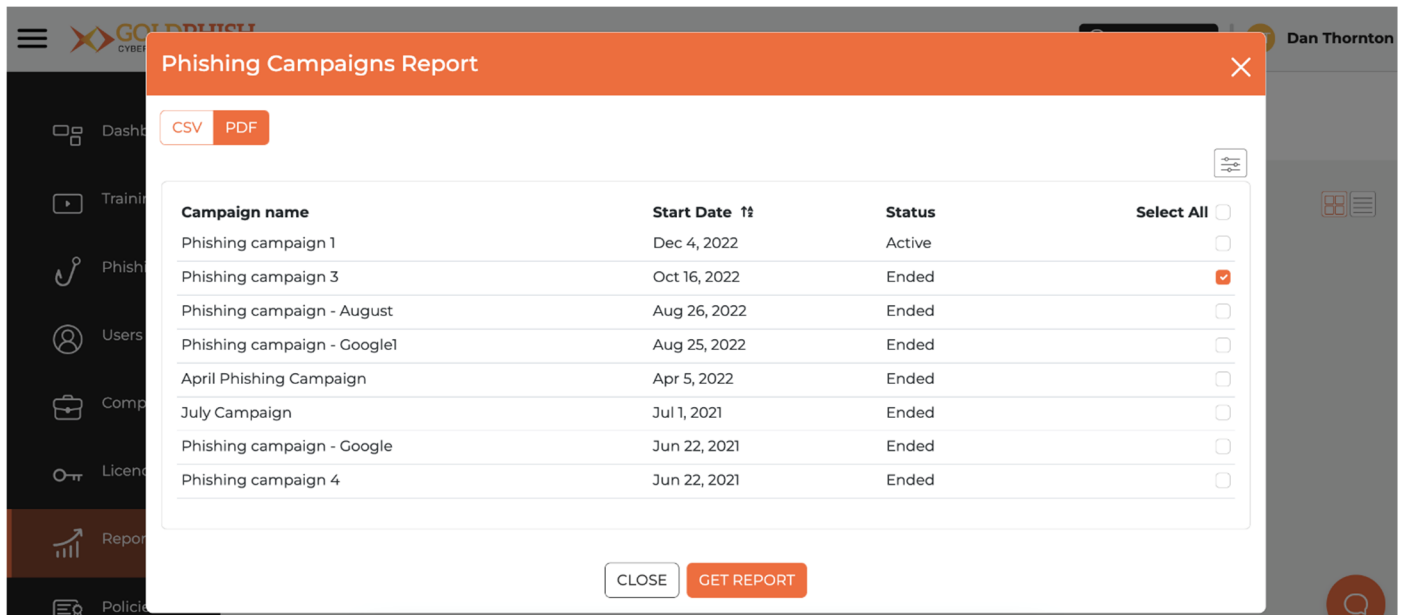
Managers can produce and download reports detailing the progress, scoring and outcomes of phishing and training campaigns.

- You can choose between a data-rich CSV report and an executive summary style PDF report for your campaign.
- Reports can be produced for individual campaigns or multiple campaigns.



1. Navigate to the Reports section on the platform, and select **Phishing Campaigns** or **Training Campaigns**.
2. Choose the type of report: **CSV** or **PDF**.
3. Select on the right hand column which campaign you want to create the report for: **Individual**, **Multiple**, or **All** campaigns.
4. Click the **Get Report** button at the bottom.



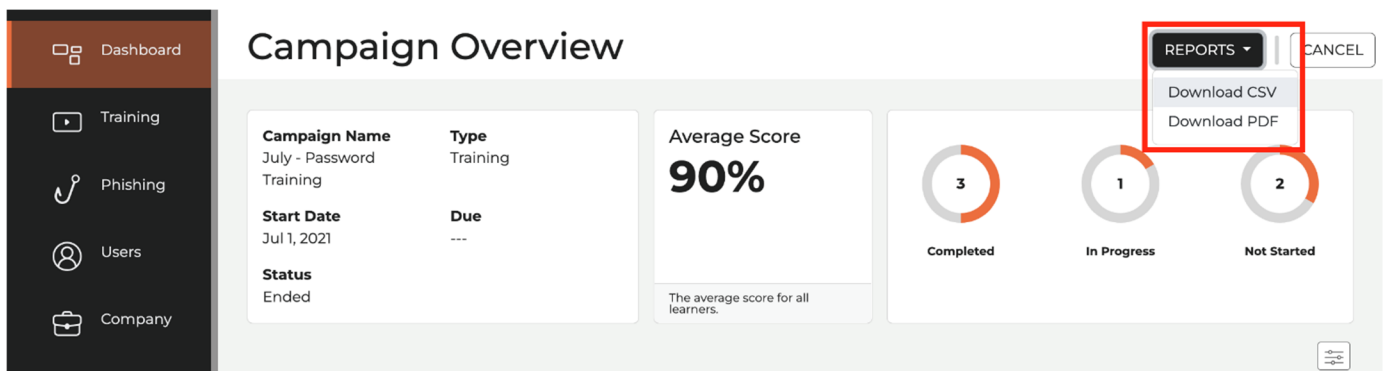
Phishing Campaigns Report

CSV PDF

Campaign name	Start Date †‡	Status	Select All
Phishing campaign 1	Dec 4, 2022	Active	<input type="checkbox"/>
Phishing campaign 3	Oct 16, 2022	Ended	<input checked="" type="checkbox"/>
Phishing campaign - August	Aug 26, 2022	Ended	<input type="checkbox"/>
Phishing campaign - Google1	Aug 25, 2022	Ended	<input type="checkbox"/>
April Phishing Campaign	Apr 5, 2022	Ended	<input type="checkbox"/>
July Campaign	Jul 1, 2021	Ended	<input type="checkbox"/>
Phishing campaign - Google	Jun 22, 2021	Ended	<input type="checkbox"/>
Phishing campaign 4	Jun 22, 2021	Ended	<input type="checkbox"/>

CLOSE GET REPORT

Alternatively, Managers can download campaign reports directly from the specific campaign dashboard by clicking on the **'Reports'** button in the top-right corner and selecting either **'CSV'** or **'PDF'** from the drop down.



Campaign Overview

Dashboard Training Phishing Users Company

REPORTS CANCEL

- Download CSV
- Download PDF

Campaign Name
July - Password Training

Type
Training

Average Score
90%

Start Date
Jul 1, 2021

Due

Status
Ended

The average score for all learners.

3 Completed

1 In Progress

2 Not Started

