

KnowBe4



SUNY  
Implementation  
Phase 2 Automation



# Agenda

- Recap of Implementation phases
- What is Knowbe4 Phish Alert Button, and why you should install it?
- How to build out Monthly ongoing Phishing Test
- How to build out Remedial Training for clickers

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Checklist for Implementing  
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# Implementation Phases/ Timeline



## Prerequisites needed prior to implementation phases.

Whitelisting

Users uploaded in the console via CSV or Active Directory/SCIM Integration

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## Onboarding Phase 1 August 5th at 3pm-

1. Test whitelisting (send phish test to small group of users to verify whitelisting is updated and emails can be delivered from KB4 to your environment.) -
2. Branding The Knowbe4 Console/Logo
3. Blind Baseline Phishing Test. - Asses the overall knowledge of the organization (likelihood of users to fall for a phishing attack)
4. Inform Local Users of Program (Leadership to educate users of the program/ongoing phishing and training being assigned)
5. Assign Initial Training with 1-2 weeks after launching your baseline phishing test

**office Hours 8/15 12-1pm**

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## Automation Phase Next -September 16th at 12pm

1. Discuss Phish Alert Button Deployment
2. Turn on Monthly (Recommended) or Quarterly Phishing Campaigns
3. Use Dynamic Clickers Training for employees who fail a phishing campaign - Clickers 1,2,3,4 and 5
4. SEI landing page (Social Engineering Indicators - shows employees "Red Flags" They should of looked out for prior to clicking on the phishing simulations)

**CAM Meeting Sept 23rd 11-12pm Eastern Time, Best Practices**

**office Hours 9/29th 12-1pm Eastern**

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## Phase 3 - Continued Knowledge Phase October 24th at 11 AM

1. These emails are designed to go out weekly or bi-weekly for supplemental training and awareness.
2. Targeted training/roll and department focused trainings for high
3. **No office Hours for this Phase**

# Implementation Phases/ Timeline



**Data Collection Phase November 3rd 2pm-3pm** - During this time we do not make any changes in the console, we allow the console to bake in the changes and begin to identify our highest risk users based on phishing activities.

**AMA-** Group think to discuss best practices in the Suny organization, what is working well from a messaging perspective and an AMA for KnowBe4 on what questions they have for us.

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**Diversification Phase December 4th 11am-12pm** - Establish trends and identify high risk and advanced users and phish using the following recommendations.

**High-risk users:** Users who have failed more phishing simulations will receive easier phishing templates until they fall below an acceptable risk threshold.

1. Recommended Bi-weekly Phishing campaigns 1-3 star templates

**Advanced users phishing:** Users who have demonstrated mastery in the phishing program will receive harder phishing templates to align with their skills

1. Recommended Monthly Phishing Campaigns 4-5 star templates

**New hire phishing:** Ramp-up approach to their phishing simulations and onboarding training

1. Easier templates are used during days 30-60 of onboarding - Biweekly 1-2 star templates
2. Medium-level difficulty introduced from days 61-90 Bi-weekly/monthly 3 star template

**Office Hours December 12th 12-1pm**

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What Is The Phish Alert Button?

# Phish Alert Button Compatibility Matrix



Email Client	<a href="#">Outlook PAB Installer for Windows</a>	<a href="#">Microsoft Ribbon PAB</a>	<a href="#">PAB Manifest for Microsoft Products (Hybrid PAB)</a>	<a href="#">Chrome Extension PAB for Google Workspace</a>	<a href="#">Gmail Add-on PAB for Google Workspace</a>
Outlook 2016	✓	x	✓	x	x
Outlook 2019	✓	x	✓	x	x
Outlook 2021	✓	x	✓	x	x
<b>Outlook 365</b>	✓	✓	✓	x	x
<b>New Outlook for Windows</b>	x	✓	✓	x	x
Outlook 2016, 2019, and 2021 for Mac: <ul style="list-style-type: none"> <li>Exchange 2016</li> <li>Exchange 2019</li> <li>Microsoft 365</li> </ul>	x	x	✓	x	x
Outlook on the Web: <ul style="list-style-type: none"> <li>Outlook Web Access (Exchange 2013, 2016, and 2019)</li> <li>Outlook Web App (Microsoft 365)</li> </ul>	x	✓	✓	x	x
Outlook for iOS	x	x	✓	x	x
Outlook for Android	x	x	✓	x	x
Gmail on the Web	x	x	x	✓	✓
Gmail for iOS	x	x	x	x	✓
Gmail for Android	x	x	x	x	✓

# Microsoft Ribbon Phish Alert Button



Ribbon PAB: For anyone using new outlook or OWA (Not available yet on MAC or Mobile)

The Microsoft Ribbon Phish Alert Button is integrated directly into the Microsoft 365 interface. Its benefits include:

Seamless integration with Microsoft Outlook 365 and Outlook Web App

No additional software installation required for end-users

Consistent user experience across Outlook desktop and web versions

Automatic language adaptation based on user settings

Easy deployment through Microsoft 365 admin center

Is available for mobile devices as well.



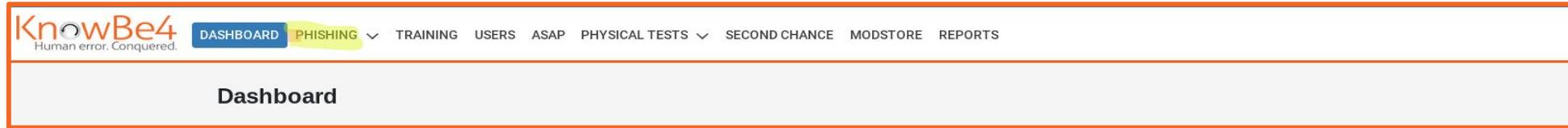
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Creating and Automating Your Phishing Campaigns

# Phishing



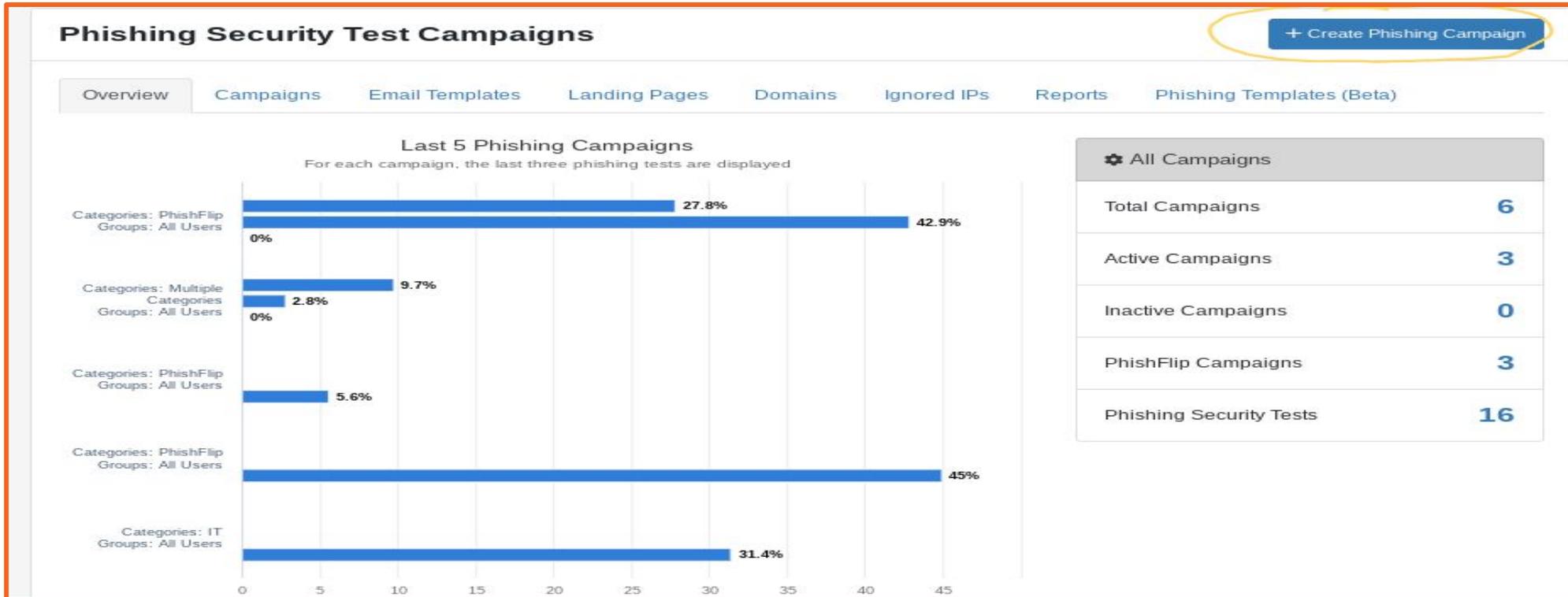
Login to your Knowbe4 Account and Click the subtab “Phishing” at the top of your page.



# How to Build a phishing campaign



Select the Phishing Tab in the console and select Phishing. On the next screen at the top right we are going to select the blue tab “+ Create Phishing Campaign”



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**Monthly Phishing Test**



## Creating the campaign

Name the campaign under campaign name “Monthly Ongoing Phishing Test”

Choose to send to “All Users”

Select Frequency “Monthly”

Choose desired Start Time and Date we want the campaign to go live

Send all Emails over 3 week period

Track Activity for desired days-3-5 days

Turn on Track Replies to Phishing Emails

Template Selection Full Random

Template topics - multiple selected

Difficulty Ratings - All ratings

**Landing page-SEI Landing Pages (Translatable) (Branded)**

Select Send email report to account admins after each phishing test

Add Clickers to LEAVE BLANK

# Monthly Phishing Test Template



Note: A campaign will start 10 minutes after it is activated or created.

Campaign Name: Monthly Ongoing Phishing Campaign

Send to: All Users | Specific Groups

### Phishing Templates

Template Categories: QR Code | Reported Phishes of the Week | Current Event of the Week | Current Event of the Month | Current Events | Data Breach | Mail Notifications | Online Services

Send Localized Emails

Difficulty Rating: All Ratings

Template Selection: Full Random (Random email to each user) | Preview

### Phishing Link

Phish Link Domain: Random Domain

Landing Page: SEI Landing Page (Translatable) (Branded) (Platinum/Diamond Only)

### Delivery Details

Frequency: One-time | Weekly | Biweekly | Monthly | Quarterly

Start Time: 09/16/2025 10:08 AM (GMT-04:00) Eastern Time (US & Canada)

Sending Period:  Send all emails when the campaign starts |  Send emails over 3 weeks

Define Business Days and Hours: Using Time Zone: (GMT-04:00)

9:00 AM to 5:00 PM

Sun Mon Tues Wed Thur Fri Sat

### Failure Tracking

Track Replies to Phishing Emails

Custom Reply-to Address Domain

reply.xyz12@ringpower 2fa.com-token-auth.com

Keep reply content for later review

Record out of office replies

Track Activity: 5 days after the sending period ends

Add Clickers to: Please select

### Reporting

Send an email report to account admins after each phishing test

# SEI Landing Pages



## Oops! You clicked on a simulated phishing test.

Please review the Social Engineering Indicators found in the email you clicked on.  
Always think before you click!

Hover over the red flags to see details:

From: USAA <account@usaa-banking.com>  
Reply-to: USAA <account@usaa-banking.com>  
Subject: New Update Available



USAA SECURITY ZONE  
USAA # ending in: \*\*\*\*\*

### New Update and Account Protection

Update regarding your online Profile and Account security is now available.

Use the secure link **BELOW** to view and verify your information.

Update Account

### Report suspicious texts and emails.

Secure validation is required to help ensure your safety and security.  
Follow the Update Account button above.

Please Note: This message came from KnowBe4, Inc. and not from the company whose name is mentioned in the body of the email message, as the company has no association with KnowBe4, Inc. and does not endorse the services of KnowBe4, Inc. The purpose of this message is to demonstrate how phishing attacks can come in emails that deceptively appear to be from reputable companies.

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Building Out Clickers Training

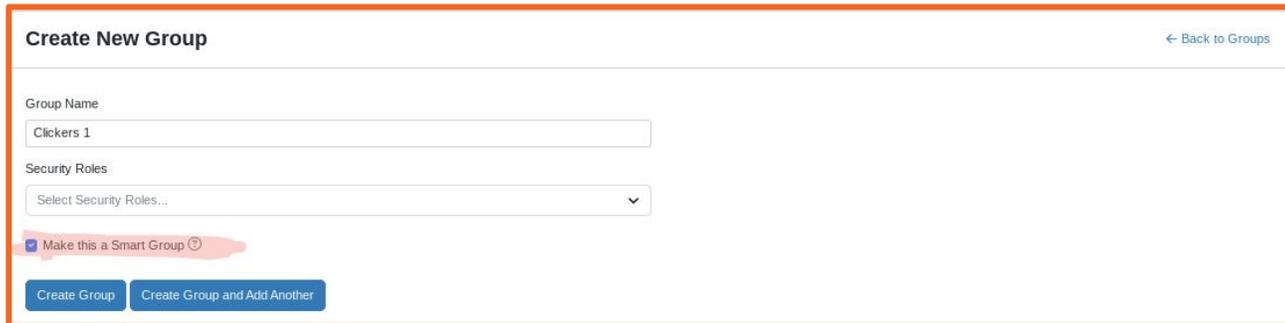
# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Under the user tab, go to the group subtab and select (Create Group)



Name Group Clickers 1 and select the option “Make this a smart Group.”



# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Select the Grey Box that says “Smart Group Criteria” and select the “Phish Event” dropdown

The screenshot shows the 'Clickers 1' group page. On the left, there is a 'Risk History' chart with a y-axis labeled 'Risk Score' ranging from 0 to 100. A data point is shown for 'Group's Risk Score 07/20/2024: 0' on '17 Jul'. On the right, there is a semi-circular gauge chart with a needle pointing to 0. Below the gauge, text reads: 'See our Virtual Risk Officer (VRO) Guide for details about how Risk Scores are calculated.' At the bottom left, the 'Smart Group Criteria' dropdown menu is open, showing 'Smart Group Criteria' selected.

The screenshot shows the 'Smart Group Criteria' dropdown menu. The menu is open, displaying a list of criteria: 'User Field', 'User Date', 'Phish Event', 'PhishFlip Event', 'Breach Event', 'Training', 'After Training', 'Organizational Assessments', 'PasswordIQ Event', and 'PasswordIQ State'. The 'Phish Event' option is highlighted in yellow. The background shows the 'Smart Group Criteria' header and a 'Users' section with '0 users'.

# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Condition = Must

Phish Event= Failed a Phishing Test

Comparison = Equal 1

Range- Select the start date of your Phishing Test and end date for 1 year from the end date.

Example- If Phishing test starts on August 1st, Logic would be Start Date 8/1/25 through 7/31/26.

# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Condition

Must

Phish Event

Failed Phishing Test

Comparison

Equal

Count

- 1 +

Time Frame

Range Duration Any

08/01/2024

Through ?

07/31/2025

Cancel Save

## Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Duplicate Process and create a second smart group, Clickers 2 with same logic

Condition = Must

Phish Event= Failed a Phishing Test

Comparison = Equal 2

Range- Select the start date of your Phishing Test and end date for 1 year from the end date.

Example- If Phishing test starts on August 1st, Logic would be Start Date 8/1/25 through 7/31/26

# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Condition

Must

Phish Event

Failed Phishing Test

Comparison

Equal

Count

- 2 +

Time Frame

Range Duration Any

08/01/2024

Through ?

07/31/2025

Cancel Save

## Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Duplicate Process and create a second smart group, Clickers 2 with same logic

Condition = Must

Phish Event= Failed a Phishing Test

Comparison = Equal 3

Range- Select the start date of your Phishing Test and end date for 1 year from the end date.

Example- If Phishing test starts on August 1st, Logic would be Start Date 8/1/25 through 7/31/26

# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Condition

Must

Phish Event

Failed Phishing Test

Comparison

Equal

Count

- 3 +

Time Frame

Range Duration Any

08/01/2024

Through ?

07/31/2025

Cancel Save

## Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Duplicate Process and create a second smart group, Clickers 2 with same logic

Condition = Must

Phish Event= Failed a Phishing Test

Comparison = Equal 4

Range- Select the start date of your Phishing Test and end date for 1 year from the end date.

Example- If Phishing test starts on August 1st, Logic would be Start Date 8/1/25 through 7/31/26

# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Condition

Must

Phish Event

Failed Phishing Test

Comparison

Equal

Count

- 4 +

Time Frame

Range Duration Any

08/01/2024

Through ?

07/31/2025

Cancel Save

## Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Duplicate Process and create a second smart group, Clickers 2 with same logic

Condition = Must

Phish Event= Failed a Phishing Test

Comparison = Equal 5

Range- Select the start date of your Phishing Test and end date for 1 year from the end date.

Example- If Phishing test starts on August 1st, Logic would be Start Date 8/1/25 through 7/31/26

# Create A Dynamic Smart Group (Clickers) 1,2,3,4, and 5



Condition

Must

Phish Event

Failed Phishing Test

Comparison

Equal

Count

- 5 +

Time Frame

Range Duration Any

08/01/2024

Through ?

07/31/2025

Cancel Save

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Building Out Clickers 1-5 Training



# Videos to Add for Continued Training

Clickers 1 - Identifying Phishing Red Flags



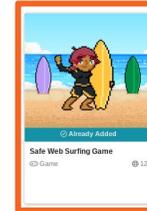
Clickers 2 - Phishing your inbox



Clickers 3 - Spot The Phish Foundational + Phishing Foundations



Clickers 4 - Security Awareness Foundations + Safe Web surfing



Clickers 5 - 2025 or 2026 45 Minute KnowBe4 Security Awareness Training



## Go To The Training Sub tab and select “ + Create Training Campaign”



Under the user tab, go to the group subtab and select (Create Group)



# Continued Training 1



Name the campaign under campaign name- Continued Training For 1st Click

Choose Start Date And Start Time - Start date/time should be the same time your phishing test are turned on.

**Relative Duration** Select Due date of 2 weeks

Select Allow Assignments to be completed after due date

Select Content - Identifying Phishing Red Flags

Turn on Track scores

Check Box- Enable Automatic enrollment for new users

Notifications-

Hit the Green Box below to add notifications -

Remove Completed Users From

Notifications

Notifications 1 Welcome Email, Remind before due date, Past Due notifications, and Campaign completions

# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



**Campaign Name** Clickers 1 Continued Training

**Start Date** 07/17/2026 9:00 AM  
(GMT-04:00) Eastern Time (US & Canada)

**End Date** Specific Date Relative Duration No End Date

**Relative Enrollment Duration**  
2 Weeks

Allow assignments to be completed after due date

**Content** Phishing: Don't Get Reeled In  
 Enable Content Survey  
 Track Scores

**Enroll Users** All Users Specific Users  
Clickers 1

**Enroll with CSV File** Please select a file...  
 Enable automatic enrollment for new users  
 Enable progress reset for remedial training

**Add Completed Users To** Select one or more groups from the list...

**Remove Completed Users From** Select one or more groups from the list...

**Notifications**  
+ Add Notification

- Past Due | Notify: User | Send Reminder: 1 day after Resend Reminder: Every 3 days
- Campaign Completion | Notify: User
- Remind Before Due Date | Notify: User | Send Reminder: 7 days before
- Welcome | Notify: User

# Continued Training 2



PRO TIP- Use the drop down tab on the right side of Actions to CLONE the previous Training Campaign



CHANGE THE NAME OF THE CLONED CAMPAIGN TO Clickers 2 Continued Training

Choose Start Date And Start Time - Start date/time should be the same time your phishing test are turned on.

**Relative Duration** Select Due date of 10 Days

Change Group to clickers 2

Change Content to Phishing Your Inbox,

Create Campaign

# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Campaign Name: Clickers 2 Continued Training

Start Date: 07/24/2026 9:00 AM  
(GMT-04:00) Eastern Time (US & Canada)

End Date: Specific Date Relative Duration No End Date

Relative Enrollment Duration: 10 Days

Allow assignments to be completed after due date

Content: Phishing Your Inbox [Visit ModStore](#)

Enable Content Survey  Track Scores

Enroll Users: All Users Specific Users

Clickers 2 [View All Groups](#)

Enroll with CSV File: Please select a file... [Browse](#)

Enable automatic enrollment for new users  Enable progress reset for remedial training

Add Completed Users To: Select one or more groups from the list...

Remove Completed Users From: Select one or more groups from the list...

Notifications

- + Add Notification
- Past Due | Notify: User | Send Reminder: 1 day after Resend Reminder: Every 3 days [Email](#)
- Campaign Completion | Notify: User [Email](#)
- Remind Before Due Date | Notify: User | Send Reminder: 7 days before [Email](#)
- Welcome | Notify: User [Email](#)

[Create Campaign](#)

# Continued Training 3



PRO TIP- Use the drop down tab on the right side of Actions to CLONE the previous Training Campaign



CHANGE THE NAME OF THE CLONED CAMPAIGN TO Clickers 2 Continued Training

Choose Start Date And Start Time - Start date/time should be the same time your phishing test are turned on.

**Relative Duration** Select Due date of 7 Days

Change Group to clickers 3

Change Content to Phishing Foundations + Spot The Phish Foundational

Create Campaign

# Create A Dynamic Smart Group (Clickers) 1,2,3,4 and 5



Campaign Name: Clickers 3 Continued Training

Start Date: 07/21/2025 9:00 AM  
(GMT-04:00) Eastern Time (US & Canada)

End Date: **Relative Duration**  
7 Days

Allow assignments to be completed after due date

Content: 2 Items selected  
Content Order:  
1. Phishing Foundations  
2. Spot the Phish Game: Foundational

Enable Content Survey  
 Track Scores

Enroll Users: **All Users**  
Clickers 3

Enroll with CSV File: Please select a file...  
 Enable automatic enrollment for new users  
 Enable progress reset for remedial training

Add Completed Users To: Select one or more groups from the list...

Remove Completed Users From: Select one or more groups from the list...

Notifications:  
+ Add Notification  
Past Due | Notify: User | Send Reminder: 1 day after  
Resend Reminder: Every 3 days  
Campaign Completion | Notify: User  
Remind Before Due Date | Notify: User | Send Reminder: 7 days before  
Welcome | Notify: User

Update Campaign

# Continued Training 4



PRO TIP- Use the drop down tab on the right side of Actions to CLONE the previous Training Campaign



CHANGE THE NAME OF THE CLONED CAMPAIGN TO Clickers 4 Continued Training

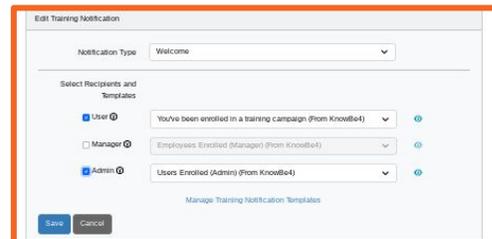
Choose Start Date And Start Time - Start date/time should be the same time your phishing test are turned on.

Relative Duration Select Due date of 5 Days

Change Group to clickers 4

Change Content to Security Awareness Foundations + Safe Web Surfing

Optional but suggested- Edit Welcome Notification to include an Admin email (If a user fails 4 times the admin team is notified in Real time for coaching opportunity to the user)



# Continued Training 5



PRO TIP- Use the drop down tab on the right side of Actions to CLONE the previous Training Campaign



CHANGE THE NAME OF THE CLONED CAMPAIGN TO Clickers 5 Continued Training

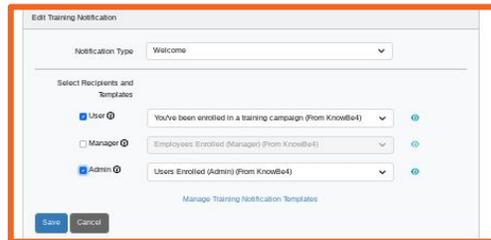
Choose Start Date And Start Time - Start date/time should be the same time your phishing test are turned on.

Relative Duration Select Due date of 3 Days

Change Group to clickers 5

Change Content 2025 KnowBe4 Security Awareness Training or 2026 KnowBe4 Security Awareness Training

Optional but suggested- Edit Welcome Notification to include an Admin email (If a user fails 5 times the admin team is notified in Real time for coaching opportunity to the user)



# Clickers 5



Campaign Name: Clickers 5 Continued Training

Start Date: 08/06/2026 9:00 AM  
(GMT-04:00) Eastern Time (US & Canada)

End Date: Specific Date | **Relative Duration** | No End Date

**Relative Enrollment Duration**  
3 Days

Allow assignments to be completed after due date

Content: 2024 Kevin Mitnick Security Awareness Training - 45 minutes  
 Enable Content Survey  
 Track Scores

Enroll Users: All Users | **Specific Users**

Clickers 5

Enroll with CSV File: Please select a file...  
 Enable automatic enrollment for new users  
 Enable progress reset for remedial training

Add Completed Users To: Select one or more groups from the list...

Remove Completed Users From: Select one or more groups from the list...

Notifications

- + Add Notification
- Past Due | Notify: User | Send Reminder: 1 day after  
Resend Reminder: Every 3 days
- Campaign Completion | Notify: User
- Remind Before Due Date | Notify: User | Send Reminder: 7 days before
- Welcome | Notify: User

Update Campaign

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Additional Resources

# Resources



Phish Alert Button Installation Guides

<https://support.knowbe4.com/hc/en-us/articles/208969608-Phish-Alert-Button-PAB-Product-Manual>

Phish Alert Button Compatibility Matrix

<https://support.knowbe4.com/hc/en-us/articles/1500011951662-Phish-Alert-Button-PAB-Compatibility-Matrix>

Ongoing Phishing Test-

<https://support.knowbe4.com/hc/en-us/articles/115010417528-Set-Up-an-Ongoing-Phishing-Test>

Clickers Training

<https://support.knowbe4.com/hc/en-us/articles/8592648153107-Video-Automating-Remedial-Training-with-Smart-Groups>

Data Confirms Value of Security Awareness Training

[https://www.knowbe4.com/hubfs/Data-Confirms-Value-of-SAT-WP\\_EN-us.pdf?hsLang=en-us](https://www.knowbe4.com/hubfs/Data-Confirms-Value-of-SAT-WP_EN-us.pdf?hsLang=en-us)

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<https://cpd.suny.edu/knowbe4-webinar-series/past-webinars/>

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THANK YOU!

