

Security Awareness Training

USER GUIDE

Office of Management &
Enterprise Services

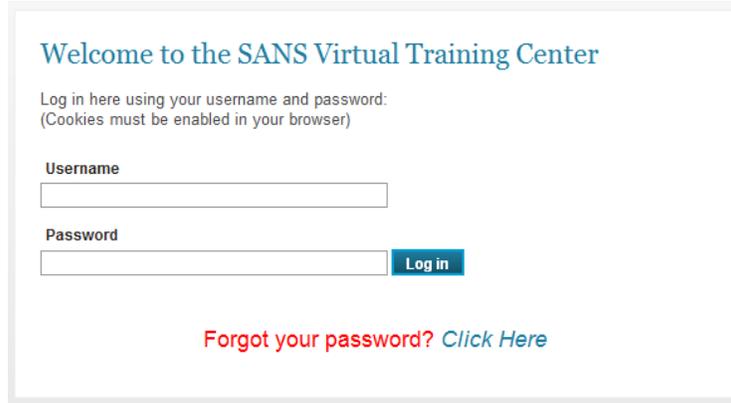
Information Services

October 2015

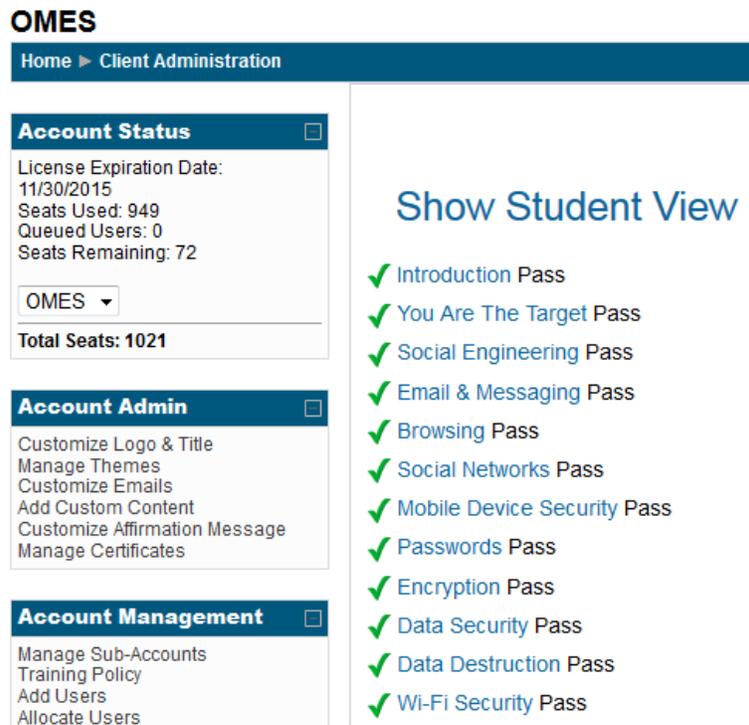


Entering a New User

1. Login to the Security Awareness Training module at:
<https://vle.securingthehuman.org/>



2. Once logged in, make sure you are in the Client Administration view. Your screen should look similar to the screenshot below.



If you see the “Library of Training Videos”, then you are in Student View. Click the **Return to Client Administration** link in the top right corner.

The screenshot shows the OMES (Operational Management and Reporting System) interface. At the top left is the OMES logo. In the top right corner, there is a link labeled "Return to Client Administration" with a small person icon next to it. A large red arrow points from the text above to this link. Below the header, there is a language selection dropdown set to "English" and a "Go" button. The main section is titled "Library of Training Videos" and indicates "Mandatory Training: 44 of 44 completed". It displays a grid of 12 video thumbnails, each with a "Completed" status. The thumbnails are: Introduction, You Are The Target, Social Engineering, Email & Messaging, Browsing, Social Networks, Mobile Device Security, Passwords, Encryption, Data Security, Data Destruction, and Wi-Fi Security. On the left side, there are links for "Change Password" (with a "Manual" option) and "Contact Support".

3. Click the **Add Users** button under Account Management.

The screenshot shows a dropdown menu titled "Account Management". The menu items are: "Manage Sub-Accounts", "Assign Training Policy", "Add Users", and "Allocate Users". The "Add Users" option is highlighted in blue.

4. Enter the new user’s information into the fields. Enter their Employee ID in the “Your Own Reference” field. In the “Department” field, enter **ISD-[Agency#]** if the new user is assigned to an agency or **ISD-[DepartmentAbbreviation]** if the new user is not assigned to an agency. (For example, if the new user was assigned to ODAFF, you would enter **ISD-040**. However, if the new user worked for the Workstation team at the ISD Data Center, you would enter **ISD-WS**.)

Add Single User

* First Name:

* Last Name:

* Email:

Your Own Reference:

Department:

* Mandatory Field

Queue New User:

Below is a list of Department codes for users not assigned to an agency:

<u>Department</u>	<u>Name</u>	<u>Reports To</u>
ISD-ADMIN	Administrative	Matt Singleton
ISD-ADS	App Dev & Support	Brad Madore
ISD-CORE	CORE	Brad Madore
ISD-CS	Customer Service	Sunni Bolt
ISD-DCOM	Datacom Services	Dustin Crossfield
ISD-EA	Enterprise Architecture	Sarjoo Shah
ISD-EDDS	Enterprise Data Driven Services	Patsy Leisering
ISD-EGID	Employee Group Insurance	Sarjoo Shah
ISD-ERSV	Ext Relation & Strat Ventures	Brian Berglan
ISD-FIN	Finance	Cathy Menefee
ISD-HD	Help Desk	Amy Max
ISD-IO	Infrastructure & Operations	Dustin Crossfield
ISD-MF	Mainframe	Aleta Seaman
ISD-MR	Midrange/Server	Dustin Crossfield
ISD-PM	Project Management	Fonda Logston
ISD-PROC	Procurement	Lisa McKim
ISD-QUAL	Service Quality	John Santos
ISD-RT	Regulatory & Transparency	Brad Madore
ISD-SEC	Security	Daniel Hanttula
ISD-SP	Security Provisioning	Laquetta Russell
ISD-WS	Workstation	Sunni Bolt
* ISD-DEFAULT	When not sure which department	
* ISD-NONE	No longer works for State of Oklahoma	

If you are not sure which department to enter for the new user, enter “**ISD-DEFAULT**”.

- Once all the fields have been filled in, make sure the **Queue New User** checkbox is checked. Then click the **Add User** button.

Add Single User

* First Name:	<input type="text" value="John"/>
* Last Name:	<input type="text" value="Doe"/>
* Email:	<input type="text" value="John.Doe@omes.ok.gov"/>
Your Own Reference:	<input type="text" value="123456"/>
Department:	<input type="text" value="ISD-PM"/>

* Mandatory Field

Queue New User:

- You will be asked to confirm the new user. If the information looks correct, click the **Confirm** button.

You are about to add the following user to the queue, for activation later.

John Doe
John.Doe@omes.ok.gov
Your reference: 123456

- The new user has now been added to your queue. Click the **OK** button.

Home ► Add Users

User "John Doe" has been added to your queue. No welcome email has been sent out yet. To activate or cancel this user, select Queued Users on your main page.

- You should now be back on the main screen for the Client Administration view. Under Account Status, the number of Queued Users ready to be added will appear in the color red. Click that number.

OMES

Home ► Client Administration

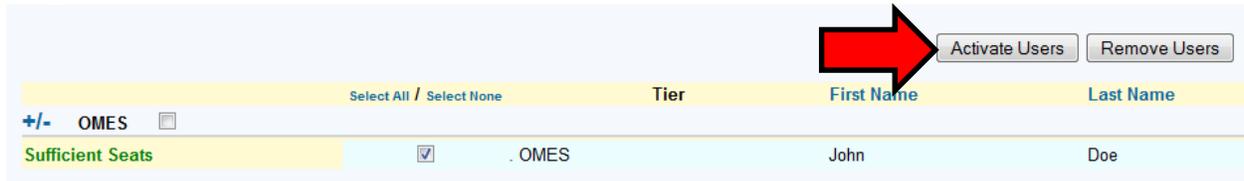
Account Status

License Expiration Date:
11/30/2015
Seats Used: 949
Queued Users: **1** ←
Seats Remaining: 72

OMES ▾

Total Seats: 1021

- The list of queued users will appear. Click the checkbox next to the queued users you wish to activate. Then click the **Activate Users** button.



The new user has now been activated. They will receive an automated email with their login information.

Removing Accounts for Separated Employees

- Click **User Profiles** under User Management.



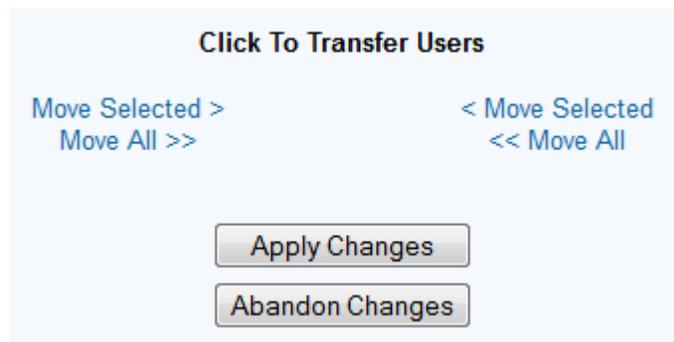
- Locate the employee you wish to remove and open their account by clicking the **View User** button.
- In their Personal Details tab, click the **Edit User** button.
- In the Edit User window, change their Department to **ISD-NONE** and click the **Update User** button.

The screenshot shows the 'Edit User' window. The title bar says 'Edit User' with a close button. Below the title bar, there is a message: 'Please enter the new personal information for this user. Starred fields are required.' Below the message, there are several input fields: '* First name: John', '* Last name: Doe', '* Email: John.Doe@omes.ok.gov', 'Department: ISD-NONE' (with a dropdown arrow and an 'Add' button), and 'Reference: 123456'. At the bottom of the window, there are two buttons: 'Update User' and 'Cancel'.

- Return to the Home screen. Click **Allocate Users** under Account Management.



- In the Allocate Users screen, you will transfer the separated employee from the OMES sub-account to the "Users to Purge" sub-account. In the OMES sub-account, select the name of the separated employee and then click **Move Selected >**. You should see their name appear under the "Users to Purge" sub-account. When finished, click the **Apply Changes** button.



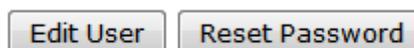
Resetting and Resending User Information

The following instructions apply when a user needs their password reset.

- Click **User Profiles** under User Management.



- Search for the employee and click the **View User** button next to their name.
- On the Personal Details tab, click the **Reset Password** button. This will send them an email with their login name and a temporary password.



The **Personal Details** tab displays the employee's information, including Name, Email, Department, Reference (Employee ID), Last Login date, Enrolled date, Started date and Completed date.

To update any of this information, click the **Edit User** button. For example, some OMES IS employees have multiple email accounts and they may want to change the email listed to an email address that they check more often. To do this, just enter the desired email address and click the **Update User** button.

The **Training Assignment** tab provides a list of the user's scheduled modules, along with the dates they modules were assigned, started and completed. You can manually send an employee a completion certificate, if they have completed their training, by clicking the **Send Completion Email** button.

Sending Reminders for Incomplete Training

The PMO sends monthly reminders to employees who have not completed their training.

1. Click the **Summary Reports** under Reports.



2. Then click the **Run Report** button for Account Details.



- You will need to send two batches of reminders. First you will send a reminder email to employees “In Progress”. Click the number of employees listed in the In Progress column (not the Users to Purge number).

Account Details

Summary: OMES

Report valid as of Fri Sep 04 2015 15:34:29 GMT-0500 (Central Standard Time)

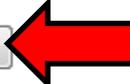
Level 2	Level 3	Enrolled	Not Started	In Progress	Completed
OMES		877	291	145	441
OMES	Users To Purge	10	4	4	2
		887	295	149	443



- Click the **Send Reminder Email** button at the top of the page.

Account Details

Details: OMES



- When completed, click your browser’s Back button to return to the Account Details page. Now click the number of employees listed in the Not Started column (again, not the Users to Purge number).
- Click the **Send Reminder Email** button again.

Quarterly Reporting to Directors/Managers

The PMO provides a Quarterly Report to directors and managers to keep them up-to-date on their employees’ progress for Security Awareness Training. The PMO pulls two different reports - one indicating the users who have not started the module and another indicating the users who have started but not completed the modules.

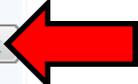
- Click **Summary Reports** under Reports.

Reports

- Summary Reports
- Historical Training

- Then click the **Run Report** button for Account Details.

Select A Report

Account Details
Provides an overview of training statistics across tiers Run Report 

Breakout Report
Provides a breakout by subaccount for all users and a status with start and completed date. Run Report

This will take you to the Account Details page.

Account Details

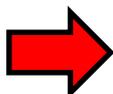
Export Data Clear Cache

Summary: OMES

Report valid as of Wed Feb 25 2015 12:49:04 GMT-0600 (Central Standard Time)

	Level 2	Level 3	Enrolled	Not Started	In Progress	Completed
OMES			949	698	112	139
			949	698	112	139

- Click the blue hyperlink number under **Not Started**. Then click the **Export Data** button near the top. Click the **OK** button to open the spreadsheet.



Not Started
698
698

Account Details

Export Data Send Reminder Email
Clear Cache

Details: OMES

- Click your browser's **Back** button to return to the Account Details page. Now click the blue hyperlink number under **In Progress**. Click the **Export Data** button and then the **OK** button to open this spreadsheet as well.
- Save the Not Started spreadsheet to the following location: **J: Drive < Function < PMO < PortfolioManagement < Quarterly Security Training Reports**.
 - Name the spreadsheet: **YYYYQtr# Not Started**
(for example, *2015Qtr1 Not Started*)
 - Delete all the columns except: First Name, Last Name, Email, Department and Reference
 - Add two new columns right of the Reference column and name them, in this order: **Percentage Completed** and **Supervisor**.

6. Save the In Progress spreadsheet in the same folder as the other spreadsheet.
 - 6.1. Name the spreadsheet: **YYYYQtr# In Progress**
 - 6.2. Delete all the columns except: First Name, Last Name, Email, Department, Reference and Percentage Completed
 - 6.3. Add a new column right of the Percentage Completed column and name it **Supervisor**.

7. Open the **Security Training Reporting Template.xltx** in the same folder.
 - 7.1. Save the report and name it in the following format:
YYYYQtr# Security Training Report
 - 7.2. On the first tab, **Statistics**, input your numbers for Enrolled, Not Started and In Progress. This will create a pie chart. (**Note:** Do not do change the Completed number. It is a formula and will update itself once you input the top three numbers.)
 - 7.3. Update the date above the pie chart. You can also create text boxes to label the different portions of the pie chart.
 - 7.4. On the second tab, **ALL-Not Started**, paste the data from the Not Started spreadsheet. The Supervisor column should populate automatically.
 - 7.4.1. In the Percentage Completed column, enter **0%** for each user.
 - 7.5. On the third tab, **ALL-In Progress**, paste the data from the In Progress spreadsheet. Again, the supervisor column should populate automatically.
 - 7.6. Once you have completed the ALL-Not Started and ALL-In Progress tabs, filter the users by Supervisor, create new tabs for each Supervisor and paste the users who either haven't started or are in progress on their respective supervisor's tab.