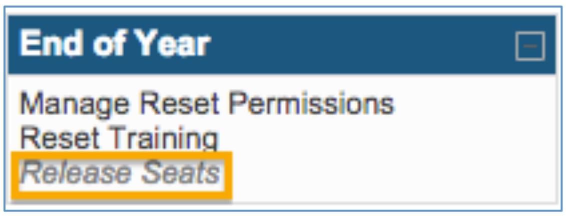
Training Reset – End of Year Processes

Overview

You can reset training for an individual User at any time of the year, but typically most Clients use the Reset Training page when moving into a new cycle for their annual security awareness program.

Release Seats Process

All Clients are given a **two-week Release Seats period** in between license years. Until this timeframe is activated the Release Seats page will be greyed out and cannot be accessed.

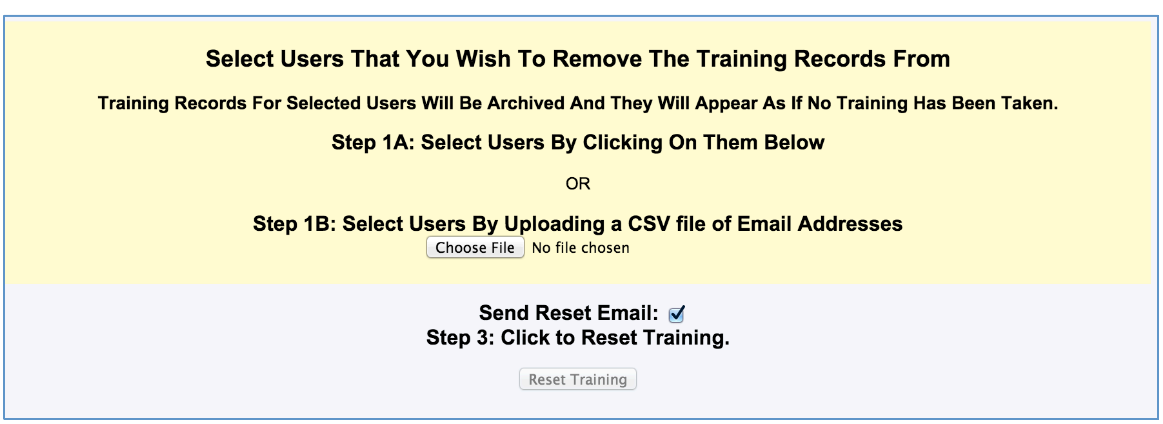


Once your **Release Seats** page is active, you can utilize this feature to remove Users that are no longer with your organization and will not be part of your security awareness program for your next training cycle. We recommend moving employees who have left your organization during the year to a "Remove" Sub-Account. This will simplify your Release Seats process between annual training periods.

NOTE: Your added employees do not use a Seat License until they have completed at least one module. Until that point you can remove them from the Manage Inactive Users page and that seat will become available for re-use.

Training Reset – End of Year

To begin a new year of training, you can utilize the **Reset Training** function to begin again. You may have multiple Sub-Accounts and each may have a different training cycle. This process will be the same for each Account.



Training Reset – End of Year Processes

Follow these steps to reset training:

1. Update your **Training Reset Email**. We recommend including the $$username$$ and $$password$$ fields in this email as many of your Users may not have accessed training in a long time (not applicable for SSO Clients).

2. Update your **Completion Certificate** and **Automatic Completion Email** settings (if applicable).

3. Update the Training Policy to display only those modules you require for the new training (see Updating Training Policies below – or reference the Training Policy User Guide – for further assistance).

4. Go to the **Reset Training** page and select the Users or Sub-Accounts you plan to reset.

5. Check the "**Send Reset Email**" box and click on **Reset Training**.

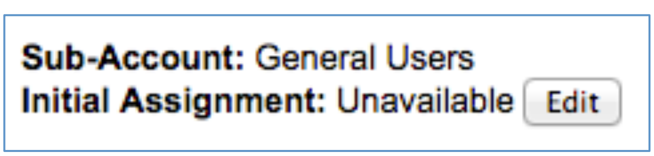
The Training Reset has archived the completions of every User from the past training period and sent the Training Reset Email. Archived training records can be accessed from your **Historical Training Report**.

You may now begin monitoring and assigning the training as you did previously and repeat the process as necessary.

Updating Training Policies

Prior to your annual training reset, you will want to review your current Training Policies and make any updates/additions required to your assigned training modules for your next round of training. **You will want to do this for each Sub-Account.**

When you log into the Training Policy page, first verify what your **Initial Assignment** is set to – we recommend that you have this set as **Unavailable** to give you access to explicitly assign the modules as needed to your training policies *(setting this as Mandatory automatically assigns all of your Users all of the modules and you will need to individually update all modules that you do not want them to see)*.



NOTE: If you previously had a Mandatory Initial Assignment there is additional guidance provided later on how to update these settings.

Editing a Current Policy

You may not have many changes that you need to make to your current policies. Remember that you have three Policy settings that you can choose from when assigning modules:

- **Mandatory**: The User is required to watch the movie, pass the quiz and, if applicable, sign-off on any custom content.
- **Recommended**: Modules are assigned to the User as optional. *These modules are not included when determining completion status.*
- **Unavailable**: These modules will not be assigned to the User

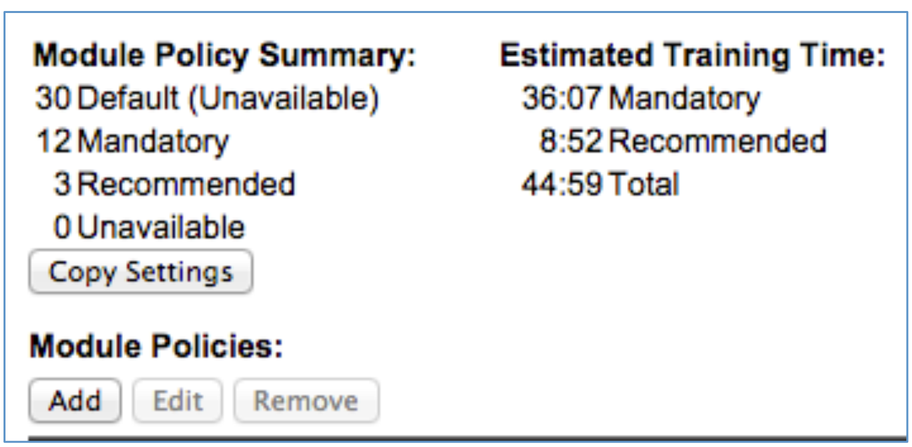
TIP: *DO NOT add Unavailable modules to Sub-Accounts unless you plan to lock down and prohibit them from being used by Sub-Account Client Admins.*

Removing Previously "Explicitly Set" Modules

Use the following steps to remove a module from your previous training policy:

1. Select the modules that you want to remove
2. Click on the **Edit** button to update them to an **Unavailable Policy** setting
3. Once this action is complete, select the modules again and click on the **Remove** button to take them out of your new training policy

Use the **Add** button to explicitly assign new modules with the policy you have selected. As you make these updates, your **Module Policy Summary** and **Estimated Training Time** will automatically update to reflect the changes you have made.



You can also review your new Training Policy from the view at the bottom of the screen.

Training Reset – End of Year Processes

Module Policies:

Add | Edit | Remove

14 policies for 45 available modules

	Module	Duration	Policy	Owner
☐	Introduction	1:26	Mandatory	VLE Admin Demo
☐	You Are The Target	4:13	Mandatory	VLE Admin Demo
☐	Social Engineering	2:53	Mandatory	VLE Admin Demo
☐	Email & Messaging	4:52	Mandatory	VLE Admin Demo
☐	Browsing	2:10	Mandatory	VLE Admin Demo
☐	Social Networks	3:10	Mandatory	VLE Admin Demo
☐	Mobile Devices	3:40	Mandatory	VLE Admin Demo
☐	Passwords	4:26	Mandatory	VLE Admin Demo
☐	Data Security	3:59	Mandatory	VLE Admin Demo
☐	Protecting Your Personal Computer	2:23	Recommended	VLE Admin Demo
☐	Protecting Your Home Network	2:04	Recommended	VLE Admin Demo
☐	Protecting Your Kids Online	4:25	Recommended	VLE Admin Demo
☐	Hacked	2:18	Mandatory	VLE Admin Demo
☐	END	1:16	Mandatory	VLE Admin Demo

Updating a Mandatory Initial Assignment

Follow these steps to update a Mandatory Initial Assignment for a Sub-Account:

1. Using the **Edit** button, update the **Initial Assignment** setting to **Unavailable**
2. Go to the **Assign User Training Page** to remove these initial assignments from your Users
   a. Click on the Unavailable Assignment Status option to update your policy settings
   b. Select all of your Users
   c. Uncheck Send Training Notification Email
   d. Click on Assign Lessons

This will remove all previous Mandatory policies that you may not have intended to attach to these modules.