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Training Policy Instructions

The following guidelines have been provided to assist you as a Client Administrator in setting/updating your training policies. Prior to making any updates in the Virtual Learning Environment (VLE), we recommend attending a Client Admin Training webinar. You can view and register for an upcoming training below:

Securing The Human – Client Admin Training on the SANS VLE

Initial Account Policy

Before doing anything else on the VLE (i.e. adding people, changing emails or adding Sub-Accounts), it is suggested that you set your Initial Assignment to Unavailable*.

Use the following steps to set up your Sub-Accounts and Training Policies:

1. Go to the Training Policy page within the Account Management section.

   ![Training Policy](image)
   
   *Unavailable is the Default setting for new clients.

2. Click on the “Edit” button to update the Initial Assignment.
3. On the popup, select **Unavailable**. Then press “Ok.”

⚠️ The Initial Assignment is the Default setting for **ALL** of the modules in the Sub-Account. If left as-is or changed to **Mandatory** or **Recommended**, then **EVERY** new person you add will be assigned these modules. Making it **Unavailable** before you start prevents the modules from being accidentally assigned and helps keep the policy in good order.

**TIP:** Before making any Sub-Accounts, determine if they need to inherit the Top-Level Training Policy. This process is also applicable to Sub-Accounts created underneath any Child Sub-Account. If they do, then create the policy by clicking on the “Add” button and selecting the modules you want to assign to your Users. This is called the **Explicit Assignment** (see next section). These modules appear in the list below the “Add” button.

If the Sub-Accounts **DO NOT** need inherited policies, then you can create the Sub-Accounts **BEFORE** you make any training policies. This will help keep the policies in good order and they will retain the Default Initial Assignment setup earlier.
Steps to Adding an Explicit Assignment

1. Click the “Add” button

2. Select the modules to add.

3. Select any policy to be applied to the modules: Mandatory, Recommended or Unavailable. (Unavailable is not recommended – see Tip below).
   - 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.
4. Press the “Ok” button to complete the addition.

5. View your Explicitly Assigned Modules (see image below) to confirm this is the list of modules you want your Users to see when they are added to the VLE (and activated). Perform the same steps above to set the Explicit Assignment for any other modules you need to add to the policy.

![Image of Explicitly Assigned Modules]

**TIP:** It is recommended that modules NOT be made Explicitly Unavailable. Setting the Initial Assignment to Unavailable will manage the policy rule for the module.

You would only explicitly add the module as Unavailable if a Sub-Account MUST have modules set as Unavailable to prohibit Sub-Account Client Admins from altering the policy. Changes to Sub-Account policies from the Top-Level Account have the authority to prescribe and prohibit modules to any Sub-Account.

**Viewing User Assignments**

The **Show All Users** page in the **User Management** section will display the modules assigned to your Queued and Active Users.

**NOTE:** Recommended modules are not displayed as assigned.
Managing Sub-Account Policies

When a Sub-Account is created from any Account, either the Top-Level or another Sub-Account, it will inherit the policy of that parent Account.

**NOTE:** Changes to the parent policy are **NOT** applied to a Sub-Account that was previously created.
Managing the Policies

From the Top-Level (or the level at which you are the Client Admin), you have the ability to apply policies to the Sub-Accounts under the Account you log in to and which you have been assigned administrative rights.

When there are Sub-Accounts, three new buttons will appear:

- Copy Settings
- Bulk Edit Modules
- Bulk Edit Defaults

Copy Settings

This button will copy the **Explicitly Assigned** module policy displayed currently on the page and allow you to apply it to other Sub-Accounts you have administrative rights for.

- Select the Sub-Accounts to apply the policy to and press “**Ok.**”
NOTE: This process affects the Sub-Accounts immediately. If there are Users who are actively training or queued in the Sub-Accounts, their assignments will automatically update and it may alter their completion status in the Summary Reports.

If Users are being assigned new modules from this change, a notification to send the Training Notification Email will be displayed. You may choose whether to send the notification.

**Bulk Edit Modules**

To help control and apply modules to Sub-Accounts, this option allows you to explicitly add specific modules as Mandatory, Recommended or Unavailable to any and all Sub-Accounts.

For instance, if you want to prohibit the module Mobile Devices from all the Sub-Accounts, then select the Bulk Edit Modules. Next, select appropriate Sub-Accounts, the Mobile Devices module and the Unavailable policy rule. Press “Ok” to save your new settings.

Review the Bulk Training Policy Confirmation and select “Ok” to lock this module as Unavailable for these Sub-Accounts.
NOTE: Sub-Account Client Admins without Top-Level access will not be able to change this policy rule. Administrators can utilize this function to assign required training to every Sub-Account and disable all modules that are not applicable to the organization.

Modules explicitly set by the Top-Level Administrator are not updatable by the Sub-Account Client Admins. They can, however, add any other module that is left available in the Default Policy bank.
**Bulk Edit Defaults**

As mentioned earlier in this document, the best rule for the Initial Assignment/Default policy is to be **Unavailable**. The Default for all of the Sub-Accounts can be set with this option. However, Sub-Account Client Admins can still change this Default if it is needed.

To perform this action, click on the **Bulk Edit Defaults** button and select the Sub-Accounts to be altered. Then select the rule for the Default assignment.
Assigning Individual Modules to Users

The **Assign User Training** page allows you to assign specific modules (in addition to the explicitly assigned modules) to individual Users or groups in a Sub-Account.

**TIP:** The Initial Assignment Policy has to be set to Unavailable in order to be able to select and assign these additional modules.

*If there are any modules made Explicitly Unavailable, Mandatory or Recommended from a Top-Level Admin, those modules will not be assignable from this page. Explicitly assigned modules will be automatically assigned and locked.*

**To assign modules to a User or group:**

1. Set the applicable modules to Mandatory, Recommended or Unavailable.

2. *(Optional)* Select the department to apply the new policy rules to.

3. Select the Users to apply the new policy rules to.

4. Determine if you want a **Training Notification Email** to be sent with this update. Click on "**Assign Lesson**" to save your settings.
NOTE: The Assign User Training page does not keep track of the training policy settings you have updated. Client Admins need to keep track of the additional modules assigned to Users or groups when using this method.

Once you exit this page, it will reset to display the available training policy for the Sub-Account (not your previous training policy updates).

Updating modules to unassigned:
1. Set the applicable modules to Unavailable
2. Select the Users to apply the new policy rules to
3. Click on “Assign Lesson” to save your settings

This will remove the assignment. If a User has completed any of these modules before they were removed, the completion status for the module will remain completed.

NOTE: Explicitly assigned modules may only be removed from the Training Policy page.
Updating Training Policy Rules

You can Add, Edit and Remove modules after creating your Training Policies.

Editing and Removing Explicit Training Policy Rules: No Active Users

If you have not yet added any Active Users, simply edit the policy rule for any applicable modules by selecting the check box next to the module. Once you have selected the module rules you want to change, press the “Edit” button.

On the Edit Module Policies popup, select the appropriate rule from the Policy dropdown and press “Ok.”

Since there are no Users in the Sub-Account, changes will not have any impact.
If you instead want to remove modules from an explicitly set list, select the modules to be removed and press the "Remove" button. This will remove the modules and reset the rule for those modules in the Default Policy.

![Remove Module Policies](image)

Press "Ok" to complete.

**Editing and Removing Modules: Active Users in Account**

Changing the policy after Users are activated can also be done very easily. However, there are some conditions to be aware of when making these changes:

- Edits made to the policies are immediately updated in the assignments for Active Users.
- Explicitly set modules override any policy applied on the Assign User Training page.
- Modules removed from the policy DO NOT alter the policy applied towards your Active Users.

To edit the policy rule of a module(s), select the check box next to the module. Then press the Edit button.
On the Edit Module Policies popup, select the appropriate rule from the Policy dropdown and then click “Ok” to save your changes.

NOTE: These edits are immediate. Changing a rule from Recommended or Unavailable to Mandatory will trigger an update to allow an email to be sent to the affected Users.

**Training Policy**

Your training policy updates have assigned new mandatory modules. 

Affected Users are those who had not previously had the module assigned to them from a previous assignment or Sub-Account.

Clicking the “Notify Users” button displays a popup revealing the affected Sub-Account and the number of Users that will be sent the Training Update Notification Email. It is a good idea to update this email template prior to making additions to any training policies.
Click on the “Send Emails” button to send this notification immediately. It can also be sent later if the Training Update Notification Email template needs to be modified. Return to this page and select “Notify Users” to complete the process when ready.

Select “Not Now” if you do not need to send this notification. In some cases, there may not be a need to send the notification, such as when resetting training. During that process, additional modules may be added and the notification will be sent from the Reset Training page.

**TIP:** Using the Bulk Edit Modules function will have the same effect on Users and modules as the process described above. If Users are affected, the option to send the Training Update Notification Email will be displayed again.

**Removing Explicitly Assigned Modules**

Removing *Explicitly Assigned* modules from a Training Policy requires additional edits – this is especially important when the modules are either Mandatory or Recommended. Pressing the Remove button DOES NOT alter the assigned policy the User sees on their training page.

Follow the following steps to remove these modules:

1. Identify and select the modules to be removed.

2. Click the “Edit” button.
3. Update the policy rule to Unavailable and click “Ok.”

![Edit Module Policies dialog box](image)

**NOTE:** Updating a module to Unavailable will remove it from the training the User sees, but it does not reset it. If the User has completed the module, it remains completed.

![Module Policies table](image)

The modules to remove immediately became invisible to the Users in this Sub-Account.

4. To complete the update to the Training Policy, select the appropriate modules again, click “Remove” and select “Ok.”

![Remove Module Policies dialog box](image)
5. The modules are removed and returned to the Default Policy.

![Module Policy Summary](image)

### Best Practices

#### Best Practices for Setting/Updating Training Policies:

- Change your **Initial Training Assignment** to **Unavailable** (and keep it Unavailable).

- Explicitly assign your Mandatory Modules for each Sub-Account.

- 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.

- To remove an **Explicitly Assigned** module from your Training Policy, you must first update the module to **Unavailable** and then remove it. (This will hide the module from the User without removing any completions.)
Annual Training Plan

The following is a common scenario for using the VLE and the Training Policy to create a yearly training plan.

Scenario: Yearly training with modules assigned quarterly

Quarter 1

- Create the Initial Training Policy for the first quarter.
- Customize your Completion Certificate on the Manage Certificates page. Turn OFF the User Display and Automatic Completion Emails. (These will be updated once you have assigned the final training for the year.)
- Upload your Users on the Add Users page. Activate the appropriate Users from the Manage Queued Users page when you are ready to assign training.
- Gauge training completion by using the Summary Report. Notify Users who have not completed training with the Training Reminder Email sent from the Summary Reports page.

Quarter 2 (Repeat for Q3)

- Modify the Training Update Notification Email (if necessary) on the Customize Emails page.
- Add new modules on the Training Policy page. Send the Training Update Notification Email to the affected Users.
- Continue to send Training Reminder Emails based on the frequency established in Quarter 1.

Quarter 4

- Add final modules for the year and notify Users.
- Update Completion Certificate/Completion Email settings on the Manage Certificates page. You may now turn on the User Display setting (if you want Users to be able to download their own Completion Certificates) and schedule the Automatic Completion Emails to be sent.
- Continue to send Training Reminder Emails. (You may want to update this email to give a final deadline for the year).
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.

Follow these steps to reset training:

1. Update your Training Reset Email. You can include the User ID and password if you desire.

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. Utilize the adding/editing and removal steps previously discussed.

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.

You may now begin monitoring and assigning the training as you did in the first year. Repeat as needed.