CLIENT ADMINISTRATOR GUIDE

Cybersecurity Education

March 2019
Legal Notice

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# Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>August 2017</td>
<td>Initial release</td>
</tr>
<tr>
<td>1.1</td>
<td>March 2018</td>
<td>Updated TLS information and formatting</td>
</tr>
<tr>
<td>1.2</td>
<td>March 2019</td>
<td>Updated formatting, GUI instructions, and screenshots.</td>
</tr>
</tbody>
</table>
Formatting Conventions

This manual uses the following formatting conventions to denote specific information.

Table 1: Formatting Conventions

<table>
<thead>
<tr>
<th>Format and Symbols</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Blue Underline</strong></td>
<td>A blue underline indicates a Web site or e-mail address.</td>
</tr>
<tr>
<td><strong>Bold</strong></td>
<td>Bold text denotes UI control and names such as commands, menu items, tab and field names, button and check box names, window and dialog box names, and areas of windows or dialog boxes.</td>
</tr>
<tr>
<td><strong>Code</strong></td>
<td>Text in this format indicates computer code or information at a command line.</td>
</tr>
<tr>
<td><strong>Italics</strong></td>
<td>Italics denotes the name of a published work, the current document, name of another document, text emphasis, to introduce a new term, and path names.</td>
</tr>
<tr>
<td>[Square brackets]</td>
<td>Square brackets indicate a placeholder for values and expressions.</td>
</tr>
<tr>
<td>(curly brackets)</td>
<td>Each set of curly brackets contains one set of mutually exclusive arguments in a command.</td>
</tr>
<tr>
<td></td>
<td>A vertical bar separates mutually exclusive arguments within curly brackets.</td>
</tr>
<tr>
<td>(parenthesis)</td>
<td>Parenthesis contain arguments or flags in a command that are not required.</td>
</tr>
<tr>
<td><strong>Note</strong>:</td>
<td>This symbol indicates information that applies to the task at hand.</td>
</tr>
<tr>
<td><strong>Tip</strong>:</td>
<td>This symbol denotes a suggestion for a better or more productive way to use the product.</td>
</tr>
<tr>
<td><strong>Caution</strong>:</td>
<td>This symbol highlights a warning against using the software in an unintended manner.</td>
</tr>
</tbody>
</table>
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1 Introduction

Trustwave Cybersecurity Education provides organizations with a convenient way to train employees. With Cybersecurity Education, you can offer consistent training to a single person, team, or everyone in your organization. You can easily create one-off and recurring curriculum that fit your organization's needs. Cybersecurity Education offers several reports that you can use to track and evaluate your employees’ progress.

Cybersecurity Education provides training assignments. An assignment is where you specify the content users will learn, due dates for when the training must be complete, information on if or when the training must recur, and who will take the training. Each assignment contains curricula which is composed of multiple courses or lessons. These curricula can come from Trustwave's standard offerings or be custom created. Assignments can be created for any number of situations including training for new hires, annual retraining, or training on updated policies and procedures.

Cybersecurity Education has two types of user roles:

- **Users** take training, view their transcripts, and update their accounts.
- **Client administrators** administrate Cybersecurity Education for your organization. They manage other users, assign training, and view reports in addition to performing the actions of a regular user.

Users are divided into organizational units called divisions. Divisions can represent geographical areas, business units, or work teams. At least one client administrator exists for every division in your organization.

1.1 Set Up

Trustwave works with your organization to create divisions for your organization and to identify and create client administrators. Afterwards, Trustwave imports users en masse into Cybersecurity Education. Once users are imported, you can assign them training individually or by division.

If your organization later needs to create more divisions or several more user accounts, contact Trustwave support for assistance.

Trustwave can also assist you with a bulk upload of training assignments when first creating your training program. Once that is complete, you can add individual training assignments through the Learning Assignment Tool.

1.2 Work Flow

The steps from initial setup to users completing their first training are straightforward:

1. During the initial setup, Trustwave creates divisions and imports users and courses.
2. Client administrators create any additional users and, if necessary, assign users to divisions.
3. Client administrators create assignments which, once submitted, assign curriculum to the users.
4. Cybersecurity Education emails users to inform them of the training.
5. Users log into Cybersecurity Education and find their training on the home page.

6. Depending on the settings of each assignment, users may need to gain approval, register, or activate their training.

7. Users take their courses.

8. After completing each course, each user receives a certificate of completion. Client administrators log in at any time to check the progress of each user and to run reports on users and assignment. They can also create new assignments and update users.
2 System Requirements and Recommendations

Cybersecurity Education has the following system requirements. It supports the browsers listed in section 2.1. Trustwave recommends that you white list the IP addresses and domains listed in section 2.2.

To use Cybersecurity Education, your computer should have the following requirements:

- 1 GB of RAM minimum
- 1 GHz processor, minimum
- A soundcard to accommodate SDT courses and videos that contain audio tracks
- A monitor with a display resolution of 1024x768 or higher is recommended. It should have at least 16-bit color quality, although 32-bit color quality is recommended.
- A network with at least 128 kbps connectivity. 256 kbps is recommended.

2.1 Supported Browsers

Cybersecurity Education supports the following browsers:

- Firefox 4 and greater
- Google Chrome
- Internet Explorer (IE) 11 and greater
- Microsoft Edge
- Safari 8 and greater

Support for IE 10 will be retired with the May 2018 release.

Browsers must be installed in a supported environment which must have:

- Support for Transport Layer Security (TLS) 1.1 or 1.2 (either 256- or 128-bit TLS encryption). TLS is disabled by default in Internet Explorer 10 on Microsoft Windows 7 and 8. To enable TLS:
  1. On Internet Explorer's menu bar, click **Tools | Internet Options | Advanced** tab.
  2. Scroll down to **Security** category.
  3. Check the option boxes for **Use TLS 1.1** and **Use TLS 1.2**.
  4. Click **OK**.
  5. Close your browser and restart Internet Explorer.

- Cookies and JavaScript enabled
- Pop-up blockers disabled for the Cornerstone application
2.2 Whitelist Recommendations

To ensure that you receive emails from the Trustwave SAE portal, you must add the following IP addresses and domains to the whitelists of your email client, firewalls, and proxy servers:

- 208.185.229.0/24
- 208.185.235.0/24
- csod.com
- cornerstoneondemand.com
3 User Tasks

User access their training through Cybersecurity Education. When they log in, they see the training that is available to them. They can click on a title to access the course.

In addition to training, users can view their transcripts, change their passwords, and set their default language.

Users can:

• Log in; see section 3.1
• Find and launch training; see section 3.2
• View their transcript; see section 3.3
• View and print a Course Completion Certificate; see section 3.4
• Change their password; see section 3.5
• Set their preferred language; see section 3.6

3.1 Log in

Go to https://trustwave.csod.com to login. Enter the username and password and click LOGIN.
3.1.1 Forgot Your Password

If you have forgotten your username or your password, click the **Forgot Username or Password?** link on the Login page. It will take you to a **Forgot password?** page where you enter your username, affirm that you are not a robot, and click **Submit**.

![Forgot password page](image)

Your password will be reset. Check your email for further instructions.

3.2 Find and Launch Training

A list of your available training appears on the front page. This training is assigned to you by your client administrator or HR department. Click the name of the course you want to begin.

Some courses launch immediately. For other courses, you must activate and launch the training.

On the course's page, next to the module you want to start, select **Activate**. Next select **Launch**. The module will load and your course will begin.
3.3 View Your Transcript

A transcript lists all of the curricula that have been assigned to a user, past and present. Users can see what courses they have taken and where they are in their current courses. They can also launch courses from the transcript.

To view a transcript, select Learning | View Your Transcript from the menu bar. All curricula are listed in the center of the page. The actions you can take for each curriculum are listed on the blue button to the right of the curriculum.

To filter the curriculum by status, click Active and select whether you want to see active, completed or archived curriculum.

To change the order of the curricula, click By Date Added and select how you want the curriculum to be listed.

To search for a particular course, enter the first few letters of the course’s name in the Search for training field and click the search icon.
3.4 View and Print a Course Completion Certificate

If you must have hard copy proof that you completed your training, you can print a course certificates after finishing a course. These certificates are available any time after completing your training.

To view and print a certificate:

1. To access your certificate is immediately after you completed the training, select Options | View Completion Page on the curriculum’s page.

2. To access your certificate later:
   a. On the home page click My Training or select Learning | View Your Transcript from the menu bar.
Your curriculum is listed in the center of the page.

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Due Date</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAE - Security Awareness for Office Employees</td>
<td>02/13/2019</td>
<td>In Progress</td>
<td>Open Curriculum</td>
</tr>
<tr>
<td>SAE - Full Preview of All SAE Lessons</td>
<td>No Due Date</td>
<td>In Progress</td>
<td>Open Curriculum</td>
</tr>
<tr>
<td>SAE - Security Awareness for PCI Compliance and Risk Reduction</td>
<td>02/10/2018</td>
<td>In Progress</td>
<td>Open Curriculum</td>
</tr>
</tbody>
</table>

b. Click **Active** and, in the dropdown list that opens, select **Completed**.

<table>
<thead>
<tr>
<th>Courses</th>
<th>Status</th>
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<td>Open Curriculum</td>
</tr>
</tbody>
</table>
c. To the right of the course you want, click the down arrow next to the blue button and select **View Completion Page**.

The course's certificate of completion opens in a new browser window.
3. On the **Training Completion** page, click **View My Certificate**.

The certificate opens.

4. Use the browser's controls to print the certificate.
3.5 Change Your Password

1. Click **My Account** in the top right corner.

   ![Preferences page opens.]

   The **Preferences** page opens.

   2. From the **Options** drop down list in the top right, select **Change Password**.

   3. In the dialog that opens, enter your current password.

   4. Enter and confirm your new password.

   5. Click **Save**.

      Your new password address is saved.
3.6 Set Your Preferred Language

1. Click **My Account** in the top right corner. The **Preferences** page opens.

2. In the **Display Language** drop down list, select the language that you want to use in Cybersecurity Education.

3. Click **Save**. The portal will return you to its main page.

4. Log out and log back in again to see your preferred language.
4 Manage Users

Every user has a Cybersecurity Education account which they must log into for training. Client administrators can create, edit, and deactivate user accounts as needed. Client administrators have access to all users in their division.

Each user account must have a name and identifier (called the username and user ID respectively) that is unique across Cybersecurity Education.

Trustwave recommends that you use the user's email address for both their username and user ID. For users that do not have an email address or who use a shared email address in your organization, Trustwave recommends that you make a username and user ID using the pattern [First Name].[Last name]-[Company name]; for example, Jane.Doe-Acme.

You can access the user management control by clicking the My Team icon on the front page of the portal after logging in, or by selecting My Team | Users from the menu bar.

From the Users page, you can:

• Search for a user; see section 4.1
• Create a user; see section 4.2
• Edit a user account; see section 4.3
• Deactivate a user or reset their employment status; see section 4.4
• Reset a user password; see section 4.5
• View a user's transcript; see section 4.6
• Export a list of users to Microsoft Excel; see section 4.7
4.1 Search for A User

You can search for a user using any or no criteria. Searching with no criteria results in a complete list of users. Adding one or more criteria narrows the list of users. Select My Team | Users from the menu bar to see the user’s page.

You can search on any of the following fields, singularly or in combination with one another:

- **Last name**
- **First name**
- **User ID**
- **Username**
- **Email**
- **City**
- **State**
- **Zip**
- **Country**
- **Active** - The user's employment status.
- **Select OU Criteria** - Only one organization unit is available, which is Division. Click on the icon next to the field to select which division to search for.

The search results will begin with the criteria you enter in the field you select and ignore the case of the search string. For example, if you search on the string "br" in the First Name field, you can find users named "Brenda" and "Brian".

Use the wild card % to substitute for any number of characters in the search string. For instance, "m%c" will find "Marco" and "Michelle".
4.2 Create a User

You can add one user at time to your team. To add several users at once, send Trustwave a list of users with all of their information to upload.

To add a user:

1. On the menu bar, select My Team | Users.

2. Click Add User.
   The Add new user page opens.

3. Enter the user's initial information:
   The fields in this section are required except for the Original Hire Date. You may enter the user's work or home address as your organization dictates.
• First Name
• Last Name
• User Name

Trustwave recommends making a user's username either their email address or a name that follows a specific pattern, such as [First Name].[Last name]-[Company name]; for example, Jane.Doe-Acme.

Trustwave recommends using a user's user name as their user ID.

a. In the User ID field, enter a unique identifier for the user.

b. Optionally, if you plan to use an employee's hire date to assign training, then enter the day that the user was hired in the Original Hire Date field.

c. Select an Active Status:
   
   • Active for employed users
   
   • Inactive for users no longer employed or on extended leave

This option allows the system to report historic data. Inactive users cannot be assigned training.

   • Active Period for users that will only be employed or active for a limited time. Enter the dates of the user's employment in the adjacent date fields.

4. Enter Contact information:

These fields are optional except for the Email Address. You may enter the user's work or home address as your organization dictates.

• Address Line 1
   
   If the street address requires two lines, use Address Line 2.

• City

• State - state or province

• Zip - postal code

• Country

• Email Address - This field is required.
5. Enter the Settings:

   ![Settings](image)

   - Select a **Display Language**. This is required.
   - Optionally, select a **Time Zone** for the user.

6. In the **Organization Structure** settings, select a **Division**.

   ![Organization Structure](image)

   - No information can be added to the other fields in this section.
   - Click the button next to the **Division** field.
     The **Select Division** dialog opens.

   ![Select Division](image)

   - Either search for the user's division or browse the hierarchy to find it.
   - Click on the division's name to select it.

7. Enter the **User Record Custom Field**'s information:

   ![User Record Custom Field](image)

   - These fields are optional.
     - Click the blue arrow to the right of **User Record Custom Field**.
     - In the **Job Role** field, enter the user's job title.
c. In the **Property ID** field, enter the identification code of the property where the user works.

8. Click **Save**.
The user is created while you are returned to the **Users** page.

### 4.3 Edit a User Account

1. Search for the user whose record you want to change.
2. In the search results, click the user's name.
   The User Record page opens, displaying the record of the user you selected.

3. Click Edit Record in the lower right corner.
   The Edit User Record page opens with the user's information filled in.

4. Update the appropriate fields.

5. If the fields in a section are missing, click the blue arrow to the right of the section's title to reveal the fields.

6. Click Save in the lower right corner.
   After your changes are saved, you are returned to the Users page.
4.4 Deactivate a User or Reset a User's Employment Status

Cybersecurity Education allows you to deactivate a user instead of deleting them. This allows Cybersecurity Education to report on the user's training as part of historic data while still treating the user account like it does not exist. Deactivated users cannot receive new assignments or training.

To deactivate a user account:

1. Search for the user whose record you want to change.

   ![User Record Page](image)

2. In the search results, click the user's name.

   The **User Record** page opens, displaying the record of the user you selected.

3. Click **Edit Record** in the lower right corner.

   The **Edit User Record** page opens with the user's information filled in.
4. To deactivate the user, change the user's Active Status to Inactive.

5. Change the user's Active Status:
   a. If the user is currently employed, select Active.
   b. If the user will only be employed or active for a limited time, select Active Period and enter the dates of the user's employment in the adjacent date fields.

6. Click Save in the lower right corner.
   After your changes are saved, you are returned to the Users page.

4.5 Reset a User Password

User can ask for a password reset from the Forgot password? page, accessible from the Login page. However, for users that share an email account, asking for a direct password reset may be more secure. When you reset a password, the system creates a temporary password that the user must reset on their next login.

To reset a user's password:

1. Search for the user whose record you want to change.
2. In the search results, locate the user's record.
3. In the **Option** column, click the down button and select **Change Password**.

![Image showing option to change password](image)

The **Password Reset Options** dialog opens.

![Image showing password reset options](image)

4. Select **Define a temporary password**.

5. Click **OK**.

The **Change Password** page opens.

![Image showing change password page](image)

6. Enter the new password into the **New Password** and **Confirm Password** fields.
7. Click **Save**. After the password is accepted, you are returned to the **Users** page.

### 4.6 View a User's Transcript

A transcript shows what courses have been assigned to a user. In a transcript, you can view the transcript details or open the training courses assigned to the users.

The transcript details describe the type of training, its duration, status, due date, and expiration date. They also show whether the user is excused from a course and the user's options for the course. You can sort the transcript details and filter them by activity. You can also view the details of each module and archive the transcript.

To view a user's transcript:

1. Search for the user whose record you want to change.
2. In the search results, locate the user's record.
3. In the **Option** column, click the down button and select **View Transcript**.

The Transcript page opens.

![Transcript page](image)

- a. To filter the training by course activity, click **Active** and select whether you want to see **Active**, **Completed**, or **Archived** courses.
- b. To filter by type, click the third button and select whether to filter the courses by **Curriculum** or by **All Types**. **All Types** is the default.
c. To re-sort the courses, click the center button and select whether to sort them:
   - By Title
   - By Status
   - By Date Added (this is the default.)
   - By Training Type
   - By Due Date

d. To search for a particular course, enter at least first two letters of the course's name in the search field and press Enter. The system returns courses that belong with your search string.

4. To see how far the user has progressed in the course, click the down arrow to the right of the course's title and choose View Training Details. The Training Details open.
   a. To view all training modules, select All Training in the Curriculum section.
   b. To view only active modules, select Activated Training in the Curriculum section.
   c. To view only inactive modules, select Not Activated Training in the Curriculum section.
   d. To sort the modules by due date, click Check to sort by due date in the Curriculum section.
   e. To view the details of a module, click the icon in the details column of that module's row.
   f. To return to the transcript, click Back in the lower left corner.

5. To open the course, click Open Curriculum to the right of the course's title.

4.7 Export a List of Users to Microsoft Excel

Cybersecurity Education can generate a list of users that can be exported into Microsoft. The list includes the users' names, usernames, user IDs, status, and identifiers such as Division and Manager.

To export such a list:

1. Search for the users you want.
2. Under the **Search** button, click the **Print** icon.

A popup window opens as the Excel file is downloaded to your computer.

3. Open the file in Excel.
5 Assign Training

Cybersecurity Education provides training through assignments. Each assignment contains curriculum, options, a schedule, and the list of users who will receive the assignment. Once an assignment is created it cannot be changed. You can however copy an existing assignment and change the copy. You can also save drafts of unsubmitted assignments to work on later.

Assignments are created in the Learning Assignment tool, which is only accessible to client administrators. The Learning Assignment tool lists all assignments including inactive and draft assignments. Once an assignment is created, it cannot be assigned to a new user. You must copy the assignment and assign the copy to the new user.

To open the Learning Assignment Tool, open Learning | Learning Assignment Tool on the menu bar.

In the Learning Assessment tool, you can:

- Create an assignment that will only happen once; see section 5.1
- Create an assignment that will recur on a set schedule; see section 5.2
- Copy an assignment; see section 5.3
- Save an unfinished assignment and return to it later; see section 5.4
- Search for assignments; see section 5.5
- Stop a recurring training from recurring; see section 5.6
5.1 Create a Single Instance of Training

1. Open the Learning Assignment Tool by selecting Learning | Learning Assignment Tool on the menu bar. The Manage Learning Assignments page opens.

2. Click Create Assignment. The Create Assignment page opens.
3. Under **General Information**:
   a. Enter the name of the assignment in the **Assignment Title** field.
   b. Enter a short description of the assignment in the **Assignment Description** field.

4. Under **Training Selection**, click **Select Training**.
The Select Training window opens.

   a. To search by title, enter a search term into the field at the top of the page.
   b. To filter by language, select which languages the training is available in from the **Languages** drop down list.
   c. Click **Apply Filters**.
      The search results appear in the lower part of the page.
   d. Click the check box next to the training courses you want.
      Your selections appear on the **Selected** tab.
e. Click **Select** in the lower right corner.
   Cybersecurity Education returns to the **Create Assignment** page and lists your selected courses in the **Training Selection** section.

![Training Selection](image)

f. Optionally, add custom instructions:
   i. Enable **Add comment to appear in the Transcript History section for each selected training.**
   ii. Enter the instructions in the text field that opens.

g. Click **Next** in the lower right corner.

5. Set options:

![Create Assignment](image)

a. For an **Assignment Type**, choose **Standard**.

b. Select a **Training Assignment Workflow**.
- **Assigned only** - The assignment is assigned to users. User must still receive approval and register to take the training.

- **Assigned and Approved** - The assignment is assigned to users. Users are pre-approved for this training but they must still register to take it.

- **Assigned, Approved, and Registered** - The assignment is assigned to users. Users are pre-approved and pre-registered for this training.

Choose **Assigned, Approved and Registered** to save time later.

c. Select the **Email Settings**:

- **Send Assign Training emails** - An Assign Training email notifies users of their curriculum's training title, duration, and due date. These emails are sent when the assignment is processed. Enable this toggle switch to send this email.

- **Send Register Training emails** - This toggle switch generates no email.

d. Choose **Next**.

6. Set a schedule for the assignment:

   a. Under **Processing Start Date** select whether you would like the assignment to be assigned to users **As soon as Assignment is submitted** or on a **Specific date**.

   b. If you chose a **Specific date**, enter the date in the field that appears.

   c. Under **Training Due Date**, select when users must complete the assignment.

   - **No due date** - There is no date by which users must complete this assignment.
• **Relative date** - The assignment is due a specified time period after users receive the assignment or are hired. Specify the time period in the fields that appear when you chose this option.

• **Specific date** - The assignment is due on a specific date. Enter the date in the field that appears when you chose this option.

d. Choose **Next**.

7. Select who will receive this assignment.

   a. To select all users, click **All Users**.
b. To select individual users, click **Select Users**. The **Select Users** window opens.

   ![Select Users Window]

   i. Click the **Users** drop down list to change the field you are searching.

      Change to **Division** to select a group of users.

   ii. Enter a search string into the search field and press **Enter**. Search results appear under the filters.

   iii. To filter by field: click the **Filters** button, enter the search string into the appropriate field, and press **Apply Filters**. Only search results that start with the filter's search string are shown.

   iv. Click the check box next to the training courses you want. Your selections appear on the **Selected** tab.
v. Click Select in the lower right corner. Cybersecurity Education returns to the Create Assignment page and lists your selected users in the User Criteria section.

c. To assign users a new instance of the courses for this assignment, enable the Enable Assign New Occurrence toggle switch.

i. To assign a new instance only if a user has already completed any previous instances, enable Only assign new occurrence to users in the 'Completed' status.

d. Click Generate Initial User List to see a list of affected users.

Here, you can deselect users or courses to exclude them from the training but still keep them in the list.

e. Choose Next.
8. Review your assignment:

This last page allows you to review your selections and, if necessary, return to previous pages to make changes.

a. Click a topic's down arrow to open the topic's accordion tab.

b. To return to a previous page, click the name of the page on the left.

c. When you are satisfied with your selection, click **Submit**.
9. When the confirmation appears, click **YES**.

The assignment appears on the **Manage Learning Assignments** page.

Cybersecurity Education will assign the courses to the applicable users and email them about their new training. This may take a few minutes to occur.

### 5.2 Create Recurring Training

Dynamic assignments allow client administrators to automatically assign training on a recurring basis. This is useful for annual security training or required retraining courses.

Dynamic assignments have more required settings than standard assignments. Be mindful of this when creating a dynamic assignment.
To create a dynamic assignment:

1. Open the Learning Assignment Tool by selecting Learning | Learning Assignment Tool on the menu bar. The Manage Learning Assignments page opens.

2. Click Create Assignment. The Create Assignment page opens.
3. Under **General Information**:  
   a. Enter the name of the assignment in the **Assignment Title** field.  
   b. Enter a short description of the assignment in the **Assignment Description** field.  

4. Under **Training Selection**, click **Select Training**. 
The **Select Training** window opens.

   a. To search by title, enter a search term into the field at the top of the page.  
   b. To filter by language, select which languages the training is available in from the **Languages** drop down list.  
   c. Click **Apply Filters**.  
      The search results appear in the lower part of the page.  
   d. Click the check box next to the training courses you want.  
      Your selections appear on the **Selected** tab.
e. Click Select in the lower right corner. Cybersecurity Education returns to the Create Assignment page and lists your selected courses in the Training Selection section.

![Training Selection](image)

f. Optionally, add custom instructions:
   i. Enable Add comment to appear in the Transcript History section for each selected training.
   ii. Enter the instructions in the text field that opens.

g. Click Next in the lower right corner.

5. Set options:

![Create Assignment](image)

   a. Under Assignment Type, chose Dynamic.
   b. Select a Training Assignment Workflow.
• **Assigned only** - The assignment is assigned to users. User must still receive approval and register to take the training.

• **Assigned and Approved** - The assignment is assigned to users. Users are pre-approved for this training but they must still register to take it.

• **Assigned, Approved, and Registered** - The assignment is assigned to users. Users are pre-approved and pre-registered for this training.

Choose **Assigned, Approved and Registered** to save time later.

c. Select the **Email Settings**:

• **Send Assign Training emails** - An Assign Training email notifies users of their curriculum's training title, duration, and due date. These emails are sent when the assignment is processed. Enable this toggle switch to send this email.

• **Send Register Training emails** - This toggle switch generates no email.

d. Click **Next**.

6. Set a schedule for the assignment:
a. Under **Processing Frequency**, select **Daily** to check each day whether users should be assigned this training.

⚠️ Only select **Daily**, otherwise Cybersecurity Education will only check users' eligibility for the assignment once a year.

b. Select a **Processing Start Date**:

- **As soon as Assignment is submitted** - Cybersecurity Education begins assigning this training to users as soon as this assignment is submitted.

- **As soon as Assignment is submitted, but assign the training relative to** - Cybersecurity Education begins assigning this training to users a specified time period after this assignment is submitted. Specify the time period in the fields that appear when you chose this option.

- **Specific date** - Cybersecurity Education begins assigning this training on the specified date. Enter the date in the field that appears.

c. Under **Training Due Date**, select when users must complete the assignment.

- **No due date** - There is no date by which users must complete this assignment.

- **Relative date** - The assignment is due a specified time period after users receive the assignment or are hired. Specify the time period in the fields that appear when you chose this option.

- **Specific date** - The assignment is due at a specific date. Enter the date in the field that appears when you chose this option.

d. To make this assignment recur, select **Enable Recurrence**.

i. Select whether the assignment should occur on a **Relative date** or **Annually**.

ii. If you select **Relative date**:

1. Enter the number of time units and whether those are days, months, or years.
2. Select from when the time period should begin.
3. If the users should complete their training before it is assigned again, enable **Recur only if the previous occurrence is complete**.
iii. If you select **Annually**, enter the date each year when the training should occur.

iv. Select when the training should end:
   - **Never**
   - **Specific Date** - enter the date.
   - **After a specific number of occurrences** - enter how many times the training should happen.

e. Choose **Next**.

7. Select who will receive this assignment.

   a. To select all users, click **All Users**.
b. To select individual users, click **Select Users**.
   The **Select Users** window opens.

   ![Select Users Window](image)

   i. Click the **Users** drop down list to change the field you are searching.

   Change to **Division** to select a group of users.

   ii. Enter a search string into the search field and press **Enter**.
   Search results appear under the filters.

   iii. To filter by field: click the **Filters** button, enter the search string into the appropriate field, and press **Apply Filters**.
   Only search results that start with the filter's search string are shown.

   iv. Click the check box next to the training courses you want.
   Your selections appear on the **Selected** tab.

   v. Click **Select** in the lower right corner.
   Cybersecurity Education returns to the **Create Assignment** page and lists your selected courses in the **User Criteria** section.

c. **Select Enable Assign New Occurrence**.

d. **Disable Only assign new occurrence to users in the 'Completed' status**.
e. Click **Generate Initial User List** to see a list of affected users. Here, you can deselect users or courses to exclude them from the training but still keep them in the list.

f. Choose **Next**.

8. Review your assignment:
This last page allows you to review your selections and, if necessary, return to previous pages to make changes.

   a. Click a topic's down arrow to open the topic's accordion tab.
   b. To return to a previous page, click the name of the page on the left.
   c. When you are satisfied with your selection, click **Submit**.

9. When the confirmation appears, click **Yes**.
The assignment appears on the **Manage Learning Assignments** page. Cybersecurity Education will assign the courses to the applicable users and email them about their new training. This may take a few minutes to occur.
5.3 Copy an Assignment

Assignments cannot be changed once they are submitted. However, you can create a copy of an existing assignment and modify the copy.

When you create a copy of an assignment, all settings are copied except for two. The word "(copy)" is appended to the title of the new assignment. Also, all users are removed from the assignment. You must add users to the new assignment.

To copy an assignment.

1. Search for the assignment on the Manage Learning Assignments page. See section 5.5.
2. Click the down arrow to the right of the title of the assignment you want to copy.
3. Choose Copy.

A copy of the assignment you selected is created as a new assignment.

4. Follow the procedure for creating a standard or dynamic assignment as appropriate and change the relevant settings from the copy to the settings for the new assignment.

5. Select who will receive this assignment.

   a. To select all users, click All Users.
b. To select individual users, click **Select Users**.
   The *Select Users* window opens.

   ![Select Users Window](image)

   i. Click the **Users** drop down list to change the field you are searching.
   Change to **Division** to select a group of users.

   ii. Enter a search string into the search field and press **Enter**.
       Search results appear under the filters.

   iii. To filter by field: click the **Filters** button, enter the search string into the appropriate field, and click **Apply Filters**.
       Only search results that start with the filter's search string are shown.

   iv. Click the check box next to the training courses you want.
       Your selections appear on the **Selected** tab.

   v. Click **Select** in the lower right corner.
       Cybersecurity Education returns to the *Create Assignment* page and lists your selected courses in the **User Criteria** section.

6. Finish and submit the assignment.
5.4 Save an Unfinished Assignment and Resume Work Later

1. Open the Learning Assignment Tool by selecting Learning | Learning Assignment Tool on the menu bar. The Manage Learning Assignments page opens.

2. Click Create Assignment. The Create Assignment page opens.
3. Build the assignment.

4. When you must stop, click **Save Draft** at the bottom of the page.

The assignment appears on the **Manage Learning Assignments** page as a draft.

5. When you are ready to resume building the assignment, search for it in the Learning Assignment Tool.

6. Click the down arrow to the right of the title of the assignment.

7. Choose **Resume Draft**.

The Learning Assignment Tool opens the assignment on the first **Create Assignment** page.

### 5.5 Find an Assignment

You can search for an assignment using any or no criteria. Searching with no criteria results in a complete list of assignments. Adding one or more criteria narrows the list of assignments. The **Manage Learning Assignments** page is available by selecting **Learning | Learning Assignment Tool** from the menu bar.

You can search or filter on any of the following fields, singularly or in combination with one another:

- **Training Title**
- **Created By** - the client administrator who created the assignment.
- **Created Date**
- **Type** - standard or dynamic
- **Status**
- **Recurrence** - do the assignments recur
- **User Criteria** - who receives the assignments.
The search results will contain the criteria you enter in the field you select and ignore the case of the search string. For example, if you search on the string "sec" in the First Name field, you can find users named "Security training for new hires" and "Yearly security review".

Use the wild card % to substitute for any number of characters in the search string. For instance, "e%r" will find "Yearly Security Training" and "New User Training".

To search for assignments:

1. Select Learning | Learning Assignment Tool from the menu bar to open the Manage Learning Assignments page.

2. To search by the assignment's title or ID, enter a search term in the field under the page's title.
3. To filter the search results by more criteria, click Filter if you do not see them already. The filters open.
   a. To search by the title of a curricula in the assignment, enter a search term in the Training Title field.
   b. To search by the person who created the assignment, enter the first few letters of the client administrator's first or last name in the Created By field.
   c. To filter by when the assignment was created:
      i. To choose a relative time frame, select the time frame from the drop down list under Created Date.
      ii. To specify a time frame, enter the beginning and end dates in the From and To fields under Created Date.
   d. To filter by the type of assignment, select Standard or Dynamic from the Type drop down list. Choose All Types to disable this filter.
e. To filter by the assignment's status, select the applicable status(es) from the Status drop down list. Choose All Statuses to disable this filter.

f. To filter by whether the assignment recurs, select On or Off in the Recurrence drop down list. Choose All to disable this filter.

g. To search by users who receive the assignments, click Select Users. The Select Users window opens.

i. Click the Users drop down list to change the field you are searching.

Advanced Search Tip: Change to Division to select a group of users.

ii. Enter a search string into the search field and press Enter. Search results appear under the filters.

iii. To filter by field: click the Filters button, enter the search string into the appropriate field, and press Apply Filters. Only search results that start with the filter's search sting are shown.

iv. Click the check box next to the users you want. Your selections appear on the Selected tab.
v. Click **Select** in the lower right corner.
   Cybersecurity Education returns to the **Manage Learning Assignments** page and lists your selected users in the **User Criteria** section.

h. To clear the filters or search terms, click **Reset Filters**.

4. Click **Apply Filters**.
The search results appear at the bottom of the page.

5. To sort the search results, select how you want to sort them from the **Sort by Created Date** drop down list.

5.6 Turn off a Recurring Training
You can stop a recurring training from happening again by making it inactive. To do so:

1. Open the Learning Assignment Tool by selecting **Learning | Learning Assignment Tool** on the menu bar.
The **Manage Learning Assignments** page opens.

   ![Learning Assignment Tool](image)

2. Search for the recurring assignment in the Learning Assignment Tool. See section 5.5.
3. Click the title of the assignment.
   The assignment's Assignment Summary page opens.

4. Disable the Active toggle switch to the right of the page's title.
6 View Reports

Cybersecurity Education offers multiple reports and dashboards for you to create and use. They are:

- **User Training Summary** - This report shows the curriculum enrollments and training progress for all users. It is your primary tool to track training. The data in this report also appears on the Cybersecurity Education dashboard.

- **Cybersecurity Education Licenses - Active** - This report shows how many SAE and SDT licenses that your organization has purchased and when they are up for renewal. You must export this report to Excel to view it.

- **Active User Count Chart** - This report show the total number of active users by division. The data in this report also appears on the Cybersecurity Education dashboard.

All of the reports can be opened using current data (see section 6.1) or historical data (see section 6.2). Dashboards are all viewed with just current data; see section 6.3.

6.1 View a Report with the Most Current Data

1. On the menu bar, select **Reports | Custom Reports**.

2. Look in the **Custom Report** table for your report.
3. In the row of the report you want, click the **Actions** down arrow and select **Refresh** to build your report. This may take a few minutes.

4. When that is complete, select **Actions | View**.

If the report is **Cybersecurity Education Licenses - Active**, select **Actions | Excel**.

5. In the report, change which fields appear by marking and unmarking the **Fields Displayed** check boxes.

6. To print or export the report:
   a. Click the **Print** icon to print the report.
b. Click the Excel icon to export the report to Microsoft Excel.

6.2 View a Report with Historical Data

1. On the menu bar, select Reports | Custom Reports.

2. Look in the Custom Report table for your report.
3. In the row of the report you want, click the **Actions** down arrow and select **History** to build your report.

The **Run History** dialog opens displaying all past versions of the report.
4. Click the View (eye) icon of the version you want to see.

   If the report is **Cybersecurity Education Licenses - Active**, click the Excel icon of the version you want to see.

   The historical report appears.

5. In the report, change which fields appear by marking and unmarking the **Fields Displayed** check boxes.

6. To print or export the report:
   a. Click the Print icon to print the report.
   b. Click the Excel icon to export the report to Microsoft Excel.
6.3 View the Dashboard

The dashboard contains visual representations of the User Training Summary and Active User Count Chart reports. The dashboards can be refreshed, printed, downloaded and have their data exported to Excel.

1. On the menu bar, select Reports | Dashboards.

2. Hover your mouse in the top right of the dashboard you want.

3. Click the down arrow that appears and select Refresh to get current information. This may take a few minutes.

4. To export the data in this dashboard to Excel:
   a. Hover your mouse in the top right of the dashboard.
   b. Click the down arrow.
   c. Choose Export to Excel.
5. To print or download a dashboard as an image or file:
   a. Click Options | Print.
   b. Use your browser’s print dialog to print the dashboard.
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Trustwave helps businesses fight cybercrime, protect data and reduce security risk. With cloud and managed security services, integrated technologies and a team of security experts, ethical hackers and researchers, Trustwave enables businesses to transform the way they manage their information security and compliance programs. More than three million businesses are enrolled in the Trustwave TrustKeeper® cloud platform, through which Trustwave delivers automated, efficient and cost-effective threat, vulnerability and compliance management. Trustwave is headquartered in Chicago, with customers in 96 countries. For more information about Trustwave, visit https://www.trustwave.com.