

# Configuring Data Security and Privacy

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# Data Security and Privacy Configuration Guide

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Welcome to the Course Configuration Guide. The purpose of this resource is to provide useful information for administrators to understand what all the options are to customize their EVERFI courses. Whether every single page is used or just one, it is important that learners are receiving the most up-to-date and relevant information they need.

Each EVERFI course has standard configuration options while newer, updated courses have additional fully-configurable pages throughout the content. These options allow you to tailor the learning experience to your unique organization. Not only will this impact the aesthetic, but it will also help the content resonate more with participants and build trust knowing their organization put thought and intention into the training.

We recommend reading through and printing out the full guide to understand the course learning objectives and to plan what content you want to use at your organization. There are suggestions from our subject-matter experts throughout the guide and areas to make notes and collaborate with other colleagues or departments who may have content to contribute.

What you can find in this guide:

1. Configurations Layouts
2. Course Overview
3. Course Map
4. Configuration Options per Module

# Configurations Layout: Standard Page

**Important to note:** All elements per page (Title, Body Text, and Image) must be included in order for the page to populate in the course. If an element is not included, then the entire page will be removed.

## 1. Your Logo

This logo appears throughout your Foundry account. Please contact your Account Manager to add or update this element.

The logo should be a high resolution image that can render well on small screens.

## 2. Title

The title appears in the top left corner of the configurable page just below the navigation bar.

We recommend having no more than 6 words that summarize the content below.

## 3. Body Text

This open text field is positioned under the Title on the left half of the page.


There are specific content suggestions in the following pages for this specific course and where it occurs in the experience.



## 4. Image

Images appear in the top right corner of the page.

Using your organization's imagery here goes a long way. Forgo the stock photos if you can and upload familiar faces and places your learners will recognize.

1



 Tools
  Michelle C


🏠 Main Menu    ≡ Navigation
📄 Citations

2

## This is the custom title

3

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

4


Back

Next

# Configurations Layout: Video Page

**Important to note:** All elements per page (Title, Body Text, and Video) must be included in order for the page to populate in the course. If an element is not included, then the entire page will be removed.

## 1. Your Logo

This logo appears throughout your Foundry account. Please contact your Account Manager to add or update this element.

The logo should be a high resolution image that can render well on small screens.

## 2. Title

The title appears at the top of the configurable page just below the navigation bar.

We recommend having no more than 6 words that summarize the content below.

## 3. Body Text

This open text field is positioned under the Title and spans the full length of the page.

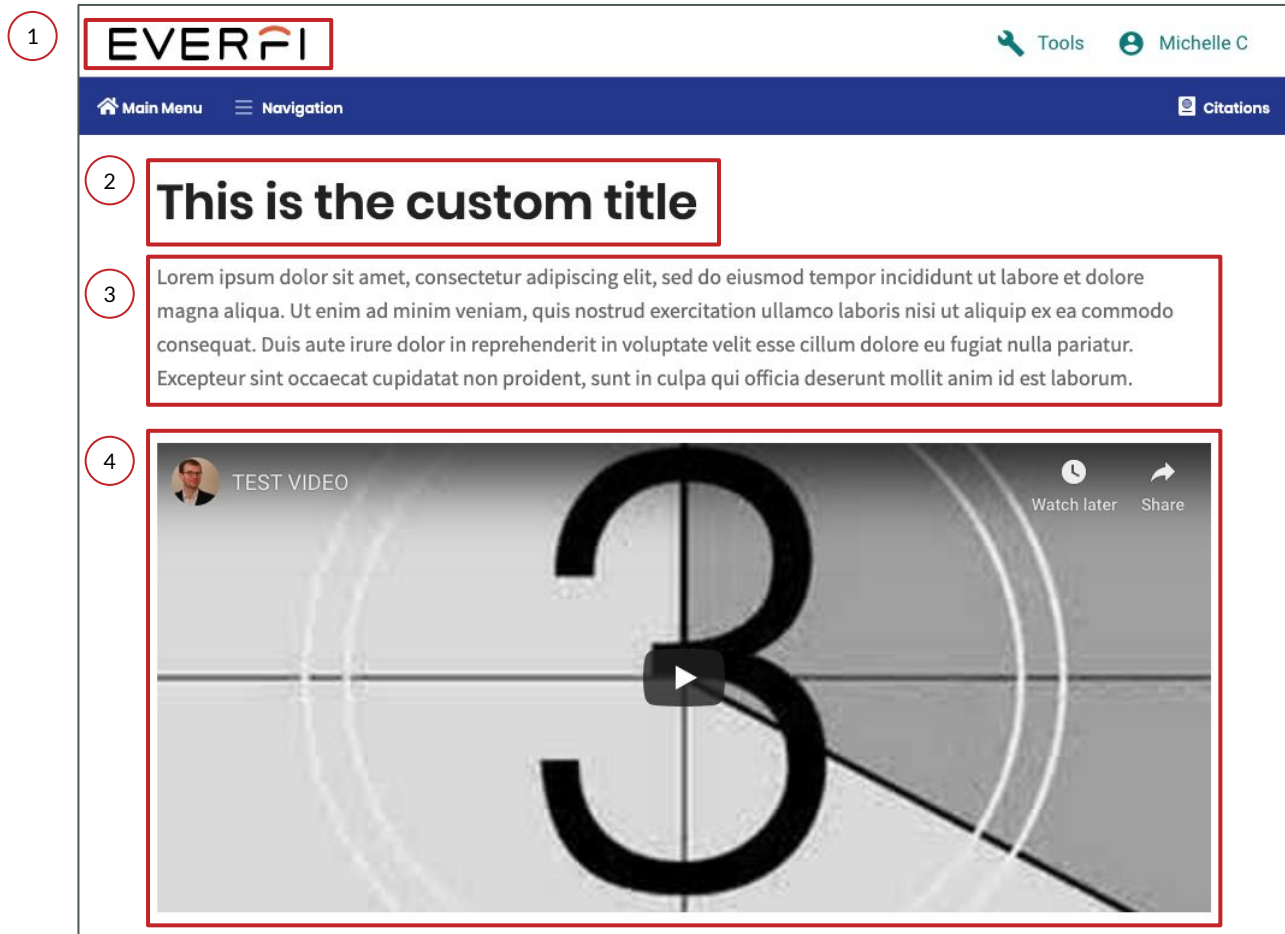
There are specific content suggestions in the following pages for this specific course and where it occurs in the experience.

## 4. Video

Uploaded videos appear below the Body Text.

Requirements:

- YouTube URL input
- Use the highest quality possible (HD)
- Quality adjusts per connection speed
- Enable Closed Captioning



# Configurations Layout: Policy and Resource Page

## 1. Title

The title appears at the top of the configurable page just below the navigation bar.

Because this is the policy page, simply stating the policy name or call-to-action is sufficient.

## 2. Body Text

This open text field is positioned under the Title.

This space can be used to add context and company expectations around the following policy.

## 3. Policy / Resource Title

Add the name of the specific policy or resource in this field. This appears in the content page as well as in the Policy Acknowledgement pop-up as shown below.

To configure this element go to the Policies or Resources sections of the Admin Dashboard.

## 4. Policy / Resource

This is where you attach your specific policies or resources for learners to access and e-sign.

Some courses have the option to include multiple documents or web pages which will be indicated in the following pages. We strongly recommend using a URL for easy maintenance.

The screenshot illustrates the configuration layout for a Policy and Resource page. It is divided into two main sections: a main page configuration and a pop-up acknowledgment window.

**Main Page Configuration:**

- 1. Title:** A text field containing "This is the custom title".
- 2. Body Text:** A large text area containing placeholder text: "Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."
- 3. Policy / Resource Title:** A text field containing "Sample Policy".
- 4. Policy / Resource:** A text field containing "View Policy".

**Policy Acknowledgment Pop-up:**

- 3. Policy / Resource Title:** A text field containing "Sample Policy".
- 4. Policy / Resource:** A text field containing "View Policy".
- Text: "Click the link below before e-signing."
- Text: "I hereby acknowledge that I have reviewed and understand this policy" (with a checked checkbox).
- Button: "Close".

# Data Security & Privacy

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## Course Overview

This course shows employees how to recognize potential threats and risky behaviors, and teaches them how to mindfully respond to cyber-threats. Along the way, employees have the opportunity to apply what they've learned in a variety of realistic scenarios. Specific topics include FERPA, phishing, pharming, social engineering, secure wireless connections, creating strong passwords, encryption, safe browsing, and watering hole attacks.

## Learning Outcomes

In this course, employees will learn what makes an organization vulnerable and the seemingly normal behaviors to engage in on a daily basis to make their workplace more secure. Employees will learn how to properly respond and report to data breaches within the organization through realistic scenarios.

## Course Details

- **Audience:** All Employees, Supervisors, Non-Supervisors
- **Course Length:** 40 minutes
- **Mobile-Friendly:** Compatible with desktops, tablets, and mobile devices

# Course Map

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## Module 1: Introduction

- Welcome to the Course
- The Data Security Problem
- Welcome Message\*
- Welcome Video\*
- Organization Messaging\*
- Takeaways\*
- Up Next

## Module 2: The Data Security Problem

- The Data Security Problem
- Are You Ready?
- Is This a Phishing Email?
- Test Your Knowledge
- Sly Stranger
- The Scope of the Problem
- What Makes Us Vulnerable?
- Sly Stranger
- Summary

## Module 3: What We Need to Protect

- What We Need to Protect
- The Things We Need to Protect
- Drunk Disclosure
- Test Your Knowledge
- Types of Private Information
- Drunk Disclosure Continued
- Test Your Knowledge
- Summary

## Module 4: Information Thieves & Their Tactics

- Information Thieves & Their Tactics
- Anatomy of a Cyber Attack
- Information Thieves & Their Tactics
- Who Are These Criminals and What are Their Motivations?
- What Devious Tactics Do Information Thieves Use?
- Spotting Phishy Emails
- Test Your Knowledge
- Spear Phishing Cases
- Test Your Knowledge
- Watering Hole Attacks
- Summary

## Module 5: How We Can Protect Data

- How We Can Protect Data
- Curious Coworker
- Protection Strategies
- Curious Coworker Continued
- Wireless Network Security
- Safeguarding Devices
- Test Your Knowledge
- Working Safely in the Cloud
- Creating Strong Passwords
- Test Your Knowledge
- Encrypt Your Devices
- Safeguarding Workstations & Records
- Test Your Knowledge
- Document Destruction
- Organization Messaging\*
- Summary

\* indicates a configurable page

# Course Map

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## Module 6: Responding & Reporting

1. Responding & Reporting
2. What to Do
3. Student Security
4. Requests for Private Information
5. Reporting Data Breaches
6. Summary

## Module 7: Final Thoughts

1. Final Thoughts
2. Policies for Review\*
3. Additional Resources\*
4. Reporting Expectations\*
5. Course Complete

\* indicates a configurable page



# Module 1: Introduction

## Topics:

- Introduction to Data Security and Privacy
- Guidance to navigate the course

## Learning Objectives:

- Begin the course with an understanding of what to expect topically and how the course functions
- Start to build an understanding surrounding many of the topic areas that comprise data security
- Understand the company's expectations to complete the course

Element in Course ----- Configuration Name	Suggested Content	Notes
<p><b>Welcome Message</b></p> <ul style="list-style-type: none"> <li>• Title</li> <li>• Text</li> <li>• Image</li> </ul> <p>-----</p> <p>Introduction Module:</p> <ul style="list-style-type: none"> <li>• Page 4 Title</li> <li>• Page 4 Text</li> <li>• Page 4 Image</li> </ul>	<ul style="list-style-type: none"> <li>• Introduce the course topic and learning objectives</li> <li>• Set expectations, goals, deadlines</li> <li>• Contact info for EVERFI tech support and an organization contact</li> <li>• Use an image of recognizable people or places (CEO, Head of HR, co-workers, working space)</li> <li>• Image Dimensions: 575px H by 495px W</li> </ul>	

<b>Element in Course</b> ----- <b>Configuration Name</b>	<b>Suggested Content</b>	<b>Notes</b>
<b>Welcome Video</b> <ul style="list-style-type: none"> <li>● Title</li> <li>● Text</li> <li>● YouTube Video</li> </ul> ----- Introduction Module: <ul style="list-style-type: none"> <li>● Page 5 Title</li> <li>● Page 5 Text</li> <li>● Page 5 Video</li> </ul>	<ul style="list-style-type: none"> <li>● This page can be used in place of the Welcome Message</li> <li>● Use any existing videos you have or create a quick talking head interview with Executives</li> <li>● Keep the video short, 30-45 seconds</li> <li>● Video upload must be a YouTube URL with Closed Captioning</li> </ul>	
<b>Corporate Message</b> <ul style="list-style-type: none"> <li>● Title</li> <li>● Text</li> <li>● Image</li> </ul> ----- Introduction Module: <ul style="list-style-type: none"> <li>● Page 6 Title</li> <li>● Page 6 Text</li> <li>● Page 6 Image</li> </ul>	<ul style="list-style-type: none"> <li>● Reiterate the value and purpose of the course and how it integrates into the company culture</li> <li>● Reference the learning outcomes and summary earlier in this guide</li> <li>● URLs to web pages with relevant resources, contact information, or information learners can bookmark</li> <li>● Use more organization-specific imagery</li> </ul>	
<b>Takeaways</b> <ul style="list-style-type: none"> <li>● Title</li> <li>● Text</li> <li>● YouTube Video</li> </ul> ----- Introduction Module: <ul style="list-style-type: none"> <li>● Page 7 Title</li> <li>● Page 7 Text</li> <li>● Page 7 Image</li> </ul>	<ul style="list-style-type: none"> <li>● Summarize what learners should come away with and clearly communicate consequences of a breach</li> <li>● Reinforce the local and global impact of data security</li> <li>● Protocol in case of a data breach or lost device</li> </ul>	

# Module 2: The Data Security Problem

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This Module does not have any configurable pages.

## Topics:

- What is sensitive information and what needs to be protected
- How thieves gain access to private information
- Adequate precautions to take to protect private information

## Learning Objectives:

- Recognize what types of information are vulnerable in the workplace
- Understand the ways employees are targeted in data security attacks
- Know best practices to protect sensitive information
- Recognize the ways information can be accessed and compromised by thieves
- Identify risky workplace habits that can leave sensitive information vulnerable to attack

# Module 3

## What We Need to Protect

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This Module does not have any configurable pages.

### Topics:

- What kind of information thieves are after, physically and online, and why employees need to protect it
- Not having access to primary information is not a justification for employees to grow complacent about data security
- Types of private information including personal information, sensitive information, and organizational information

### Learning Objectives:

- Recognize points of weakness in the workplace that can be targets
- Understand that human error and lapses in judgment can make data easier for thieves to access
- Identify the three types of private information: personal, sensitive, and organizational

# Module 4: Information Thieves and Their Tactics

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This Module does not have any configurable pages.

## Topics:

- Who is after private information and how they intend to get it
- Reasons why information thieves attack organizations
- Tactics used, mostly involving a human element

## Learning Objectives:

- Understand the range of tactics information thieves use to steal sensitive information from individuals and from organizations
- Develop an awareness of these tactics and how to avoid them

# Module 5: How We Can Protect Data

**Topics:**

- Online best practices using secure and trustworthy wi-fi networks
- Creating strong passwords and using encryption to protect sensitive devices and files
- Discretion in conversations to avoid unintentional consequences

**Learning Objectives:**

- Practice creating safe and strong passwords
- Recognize best practices when online
- Identify how to be discreet when discussing private information

<b>Element in Course</b> ----- <b>Configuration Name</b>	<b>Suggested Content</b>	<b>Notes</b>
<p><b>Company Message</b></p> <ul style="list-style-type: none"> <li>• Title</li> <li>• Text</li> <li>• Policy name</li> <li>• Document</li> </ul> <p>-----</p> <p>How We Can Protect Data Module :</p> <ul style="list-style-type: none"> <li>• Page 13 Title</li> <li>• Page 13 Text</li> <li>• Policy: How We Can Protect Data Module, Page 13 Policy</li> </ul>	<ul style="list-style-type: none"> <li>• Use the policy name or other clear call-to-action for learners to e-sign the policy</li> <li>• Context and expectations to adhere to the policy</li> <li>• Reiterate protocol if there is a data breach</li> <li>• Provide organization point of contact in case of questions</li> <li>• Recommended policy (only 1 can be used):               <ul style="list-style-type: none"> <li>• Data Security Policy</li> </ul> </li> <li>• Using a URL makes it easier to be sure they are up to date for participants</li> </ul>	

# Module 6: Responding & Reporting

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This Module does not have any configurable pages.

## Topics:

- Quick and effective responses to report suspicious messages that may contain phishing attacks and data breaches
- Appropriate responses to private information requests

## Learning Objectives:

- Recognize the responsibility to report suspicious messages and data breaches to the right people in your organization
- Practice identifying suspicious requests for private information

# Module 7: Final Thoughts

## Topics:

- Review and summary of Data Security and Privacy
- Wrap up company-specific information including:
  - Additional policy to review
  - Reporting protocols and expectations
  - Contact information if more questions arise
  - Anti-retaliation statement

## Learning Objectives:

- Recall organizational policies regarding data security and privacy
- Explore topics further through provided resources

Element in Course ----- Configuration Name	Suggested Content	Notes
<p><b>Policies for Review</b></p> <ul style="list-style-type: none"> <li>• Title</li> <li>• Text</li> <li>• Policy name</li> <li>• Document</li> </ul> <p>-----</p> <p>Final Thoughts Module:</p> <ul style="list-style-type: none"> <li>• Page 1 Title</li> <li>• Page 1 Text</li> <li>• Policies: Final Thoughts Module, Page 1 Policy</li> </ul>	<ul style="list-style-type: none"> <li>• Use the policy name or other clear call-to-action for learners to e-sign the policy</li> <li>• Context and expectations to adhere to the policy</li> <li>• Reiterate protocol if there is a data breach</li> <li>• Provide organization point of contact in case of questions</li> <li>• Suggested policy (only 1 can be used):           <ul style="list-style-type: none"> <li>• Social Media Policy</li> <li>• Credit Card Policy</li> </ul> </li> <li>• Using a URL makes it easier to be sure they are up to date for participants</li> </ul>	



<b>Element in Course</b> ----- <b>Configuration Name</b>	<b>Suggested Content</b>	<b>Notes</b>
<p><b>Additional Resources</b></p> <ul style="list-style-type: none"> <li>• Title</li> <li>• Text</li> <li>• Resource name</li> <li>• Document</li> </ul> <p>-----</p> <p>Final Thoughts Module:</p> <ul style="list-style-type: none"> <li>• Page 2 Title</li> <li>• Page 2 Text</li> <li>• Resource: Final Thoughts Module, Page 2 Resource</li> </ul>	<ul style="list-style-type: none"> <li>• This page can be used to compile any additional resources you want learners to review in summary of the course</li> <li>• Add links to existing guidance, resources, hotlines, contact information that are updated in real time</li> <li>• Instructions to encrypt data</li> <li>• Suggestions for strong passwords</li> <li>• Using a URL makes it easier to be sure they are up to date for participants</li> </ul>	
<p><b>Reporting Expectations</b></p> <ul style="list-style-type: none"> <li>• Title</li> <li>• Text</li> <li>• Image</li> </ul> <p>-----</p> <p>Final :</p> <ul style="list-style-type: none"> <li>• Page 6 Title</li> <li>• Page 6 Text</li> <li>• Page 6 Image</li> </ul>	<ul style="list-style-type: none"> <li>• Expectations and process to report a data breach, suspicious activity, or lost devices</li> <li>• Who to contact for questions</li> <li>• Anti-retaliation statement</li> </ul>	

EVERFI, Inc. is the leading education technology company that has revolutionized prevention and compliance training online through its industry-leading courseware and technology. EVERFI educates employees on important skills relating to harassment, diversity and inclusion, culture, ethics, code of conduct and data security. Courses are built by a team of attorneys, prevention experts, and instructional designers who ensure that EVERFI's prevention and compliance courses are aligned with applicable law and research-based best practices. Our industry leading instructional design and subject matter expertise demonstrates our commitment to the core issues behind critical topics that are at the center of healthy workplace culture.

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Learn more about EVERFI Conduct & Culture at [everfi.com/offerings/conduct-and-culture](https://everfi.com/offerings/conduct-and-culture)