

# Configuring PCI DSS: Payment Card Industry Data Security Standard

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# PCI DSS 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: Welcome to the Course 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. 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.

## 2. 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.

## 3. 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.

The screenshot shows a configuration page for a course. At the top, there is a dark blue navigation bar. Below it, the page layout is divided into three main sections:

- 1. Title:** A red-bordered box containing the text "Sample Custom Page Title".
- 2. Body Text:** A red-bordered box containing the text "This page can be used to provide custom information to employees of your organization."
- 3. Image:** A red-bordered box containing a photograph of a diverse group of people with their hands stacked in a circle, symbolizing teamwork. A "gettyimages" watermark is visible in the bottom right of the image.

At the bottom of the page, there are two dark blue buttons: "← Back" on the left and "Next →" on the right.

# 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. 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.

## 2. Body Text

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

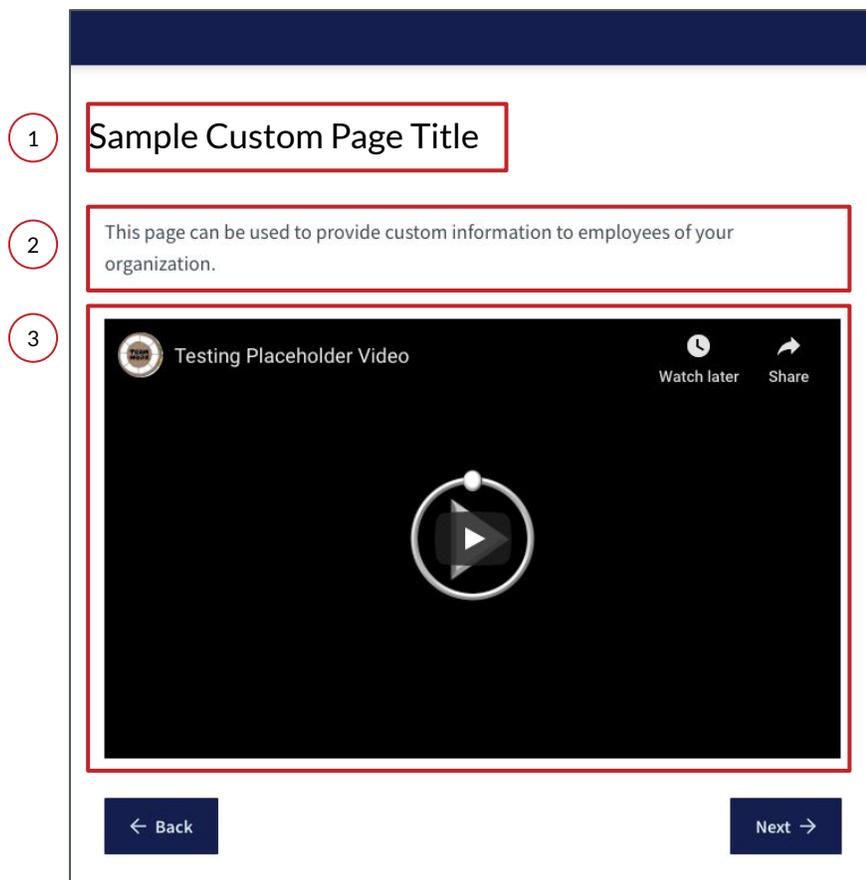
There are specific content suggestions in the following pages for this specific course and where it occurs in the experience.

## 3. 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 / Resource Page

## 1. Policy / Resource Title

Add the name of the specific policy or resource in this field. This appears in the content page and in the course navigation menu.

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

## 2. Policy / Resource

This is where you attach your specific policies or resources for learners to access and e-sign (for policies only). For the policy in this course, it will appear on the content page within the course. For the resource, they will appear in the navigation window.

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.

Custom: Insert Your Title

This page can be used to provide custom information to employees of your organization.

1 **Example Policy**  
Review before e-signing

2 **View Policy**  
 I hereby acknowledge that I have reviewed and understand this policy

[← Back](#) [Next →](#)

# PCI DSS: Payment Card Industry Data Security Standard

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## Course Overview

This course covers the requirements of the Payment Card Industry Data Security Standard (PCI DSS). It provides employees with the knowledge and skills to properly store and/or dispose of different types of important information on payment cards. PCI DSS training helps protect organizations and their customers from liability and theft.

## Learning Outcomes

In this course, employees will learn how to

- Introduction to course content
- Identify what actions must be taken by their organization to comply with PCI DSS
- Recognize the importance of PCI DSS compliance
- Explain how PCI DSS compliance protects both the organization and their customers
- Implement strategies to keep customer data safe
- Implement strategies to identify and report suspicious activity and potential data breaches"

## Course Details

- **Audience:** All Employees
- **Course Length:** 20 minutes
- **Mobile-Friendly:** Compatible with desktops, tablets, and mobile devices

# Course Map

## Module 1: Introduction

- Payment Card Industry Data Security Standards
- **Standard Custom Page\***
- **Custom Video Page\***

## Module 2: Payment Card Industry Data Security Standards

- Payment Card Industry Data Security Standards
- Maria's Story
- Payment Card Industry
- What is PCI DSS?
- Who's Who?
- The Payment Card Process
- Payment Card Terms
- Merchant Responsibilities
- Why PCI DSS?
- Securing Cardholder Data
- PCI DSS Requirements
- Part of a System
- Types of Payment Card Data
- Payment Card Data Storage
- A New Account?
- Data Classification and Labeling
- Data Retention and Disposal
- Data Security
- Tech Problems
- Password Requirements
- Securing Computers and Media
- Visitors
- The New Hire
- Reporting
- Protect Your Passwords
- **Standard Custom Page\***
- Pocket Protection?
- **Standard Custom Page\***
- Summary

## Module 3: Conclusion

- Conclusion
- **Policy Acknowledgement\***
- **Policy Acknowledgement\***
- **Policy Acknowledgement\***
- **Custom Resource Page\***
- **Custom Resource Page\***
- **Custom Resource Page\***
- **Standard Custom Page\***
- **Custom Video Page\***
- Course Complete

\* indicates a configurable page

# Module 1: Introduction

## Topics:

- Introduction to the topics of antitrust

## Learning Objectives:

- Start the course with an understanding of what to expect topically

Configuration Name	Layout	Suggested Content
<b>Welcome Letter Page 2</b> <ul style="list-style-type: none"> <li>• Custom Page Title</li> <li>• Custom Page Text</li> <li>• Custom Page Image</li> </ul>	<b>Standard Page</b>	<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:</li> <li>• 575px H by 495px W</li> </ul>
<b>Welcome Video Page 3</b> <ul style="list-style-type: none"> <li>• Custom Page Title</li> <li>• Custom Page Text</li> <li>• Custom Page Video</li> </ul>	<b>Video Page</b>	<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>

# Module 2: Payment Card Industry Data Security Standards

## Topics:

- Define PCI DSS
- Relevant Entities
- Payment Card Process
- Information to Protect
- PCI DSS Requirements
- Data Security

## Learning Objectives:

- Identify what actions must be taken by their organization to comply with PCI DSS
- Recognize the importance of PCI DSS compliance
- Explain how PCI DSS compliance protects both the organization and their customers
- Implement strategies to keep customer data safe
- Implement strategies to identify and report suspicious activity and potential data breaches

Configuration Name	Layout	Suggested Content
<b>Page 26</b> <ul style="list-style-type: none"> <li>• Custom Page Title</li> <li>• Custom Page Text</li> <li>• Custom Page Image</li> </ul>	<b>Standard Page</b>	<ul style="list-style-type: none"> <li>• Reiterate the commitment to protect the safety of your specific customer base; list out specific customer roles or companies you work with</li> <li>• Provide specific examples of entities, departments, roles, and scenarios that your learners are familiar with where they need to be aware of what information can and cannot be stored</li> <li>• List any resources or additional information your organization may have for learners to reach out to</li> <li>• If there are any general data security protocols, resources, or contacts, list them here</li> </ul>
<b>Page 28</b> <ul style="list-style-type: none"> <li>• Custom Page Title</li> <li>• Custom Page Text</li> <li>• Custom Page Image</li> </ul>	<b>Standard Page</b>	

# Module 3: Conclusion

## Topics:

- Review of concepts
- Organizational messages

## Learning Objectives:

- Review and acknowledge organizational policies and resources

Configuration Name	Layout	Suggested Content
<b>Page 2</b> <ul style="list-style-type: none"> <li>• Custom Page Title</li> <li>• Custom Page Text</li> <li>• Custom Page Policy</li> </ul>	<b>Policy Page</b>	<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>• Outline context and company expectations to adhere to the policy</li> <li>• Reiterate protocol if there is suspicious activity, violation of policy, and how to report</li> <li>• Provide organization point of contact in case of questions</li> <li>• Upload 1 policy per page</li> <li>• Using a URL makes it easier to be sure they are up to date for participants</li> <li>• Any page without a policy will not appear in the course for the learner</li> </ul>
<b>Page 3</b> <ul style="list-style-type: none"> <li>• Custom Page Title</li> <li>• Custom Page Text</li> <li>• Custom Page Policy</li> </ul>	<b>Policy Page</b>	
<b>Page 4</b> <ul style="list-style-type: none"> <li>• Custom Page Title</li> <li>• Custom Page Text</li> <li>• Custom Page Policy</li> </ul>	<b>Policy Page</b>	

Configuration Name	Layout	Suggested Content
<b>Page 5</b> <ul style="list-style-type: none"> <li>● Custom Page Title</li> <li>● Custom Page Text</li> <li>● Custom Page Resource</li> </ul>	<b>Resource Page</b>	<ul style="list-style-type: none"> <li>● These pages 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> </ul>
<b>Page 6</b> <ul style="list-style-type: none"> <li>● Custom Page Title</li> <li>● Custom Page Text</li> <li>● Custom Page Resource</li> </ul>	<b>Resource Page</b>	<ul style="list-style-type: none"> <li>● Quick guide or checklist they can download of what can and cannot be saved; tips for general data security on and offline; protocols for specific roles or interactions handling sensitive data</li> <li>● Reporting channels and protocols</li> </ul>
<b>Page 7</b> <ul style="list-style-type: none"> <li>● Custom Page Title</li> <li>● Custom Page Text</li> <li>● Custom Page Resource</li> </ul>	<b>Resource Page</b>	<ul style="list-style-type: none"> <li>● Employee handbook</li> <li>● Using a URL makes it easier to be sure they are up to date for participants</li> </ul>
<b>Page 8</b> <ul style="list-style-type: none"> <li>● Custom Page Title</li> <li>● Custom Page Text</li> <li>● Custom Page Image</li> </ul>	<b>Standard Page</b>	<ul style="list-style-type: none"> <li>● A closing message for learners</li> <li>● Have the letter come from the CEO, other leadership, or the person who wrote the Welcome Letter</li> <li>● Reiterate the goals and takeaways of the experience, community expectations</li> <li>● Use an image of recognizable people or places (CEO, Head of HR, co-workers, working space)</li> <li>● Stay away from using stock images</li> </ul>
<b>Page 9</b> <ul style="list-style-type: none"> <li>● Custom Page Title</li> <li>● Custom Page Text</li> <li>● Custom Page Video</li> </ul>	<b>Video Page</b>	<ul style="list-style-type: none"> <li>● A closing message for learners</li> <li>● Have the letter come from the CEO, other leadership, or the person who wrote the Welcome Letter</li> <li>● Reiterate the goals and takeaways of the experience, community expectations</li> <li>● Requirements:               <ul style="list-style-type: none"> <li>○ Needs to be a Youtube Video</li> <li>○ Enable Closed Captioning</li> </ul> </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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