

KNOWBE4 TRAINING PLATFORM

INFORMATION AND GUIDELINES FOR TRAINING DELIVERY

KnowBe4 is the application used to deliver required training campaigns (modules) at UTRGV.

This document contains information about roles and responsibilities, requesting access for training campaign owners responsible for developing content and other related training information.

ROLES AND RESPONSIBILITIES

User

Users are UTRGV employees who are required to take training in KnowBe4. Email notifications are usually sent to the user to access and complete campaigns (training material).

Training Campaign Owner

Responsible for developing the training content and providing the content for the training campaign, provide criteria for training requirements, provide email messages/content for email notifications.

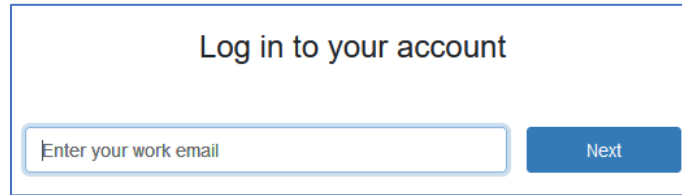
Administrator

Responsible for creating training campaigns, uploading content for the campaign provided by the training campaign owner. The administrator is not the developer of the training content.

USERS

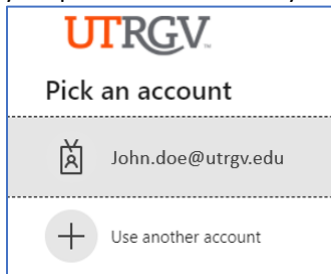
Access scheduled training

An email notification is sent to the user to complete training. Users can also access it directly by logging in to the **KnowBe4 website** found at <https://training.knowbe4.com/ui/login> and entering your email address.

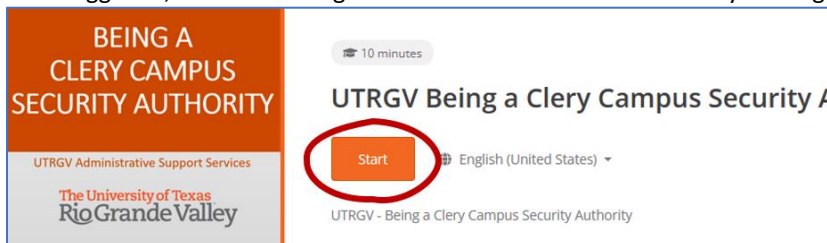



Click on the “Next” button.

Note: If logging in for the first time, you will need to select your account and enter your password, otherwise, if your password is saved in your browser, you will go to the KnowBe4 screen.



Once logged in, a list of trainings will be available for user to take by clicking on the “Start” button.



Once the training opens in a new browser window, you can click on the “Next”, “Prev” to navigate through the training. You can also make the training window full-size by clicking on the resize icon. 



At end of training, make sure you acknowledge completing the training to receive credit.

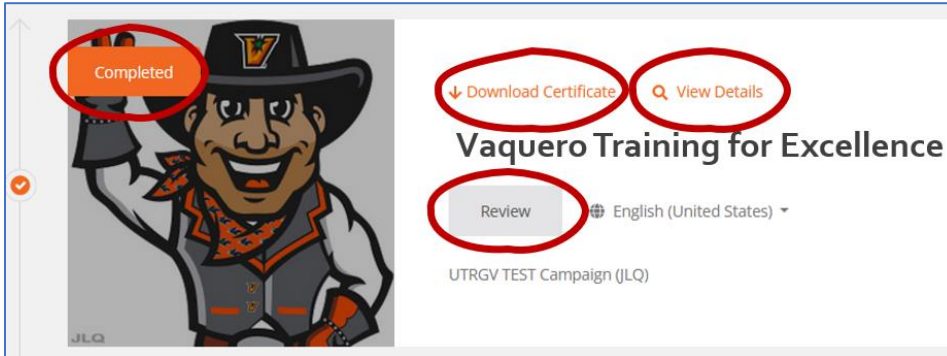
This completes your UTRGV "Being a Clery Campus Security Authority" training.

Press OK and submit to acknowledge completing this training material.

OK

Cancel

If a training is completed, once you go back to the main menu, it will be tagged as "Completed". User will be able to download the certificate for that training, view details (date completed, time spent) or review content.



Sample of Certificate:



Training Dashboard

A Supervisor can view a Dashboard listing the employees you supervise and also to review Overdue, Coming Soon and Completed trainings. Log in to KnowBe4 using your UTRGV credentials, at [Team Dashboard | KnowBe4](#)

Select Dashboard from the Menu and click on Team Dashboard where you can navigate to the Details for last year.

The screenshot shows the KnowBe4 Training Dashboard for a supervisor. At the top left is the University of Texas Rio Grande Valley Information Security Office logo. To the right are navigation links for 'Dashboard' and 'Training'. Below these are two tabs: 'My Dashboard' and 'Team Dashboard', with 'Team Dashboard' selected. The main content area is divided into two sections. The first section, 'Training Progress', shows a 50% completion rate for training assignments completed by team members within the last year, with a progress bar and the text '3 / 6'. The second section, 'Team Details for the Last Year', includes a 'View All (4)' link and three summary cards: '0 Training Overdue', '0 Training Due Soon', and '2 Completed Training'. Below these cards is a calendar icon and the text 'All of your team members are up to date on their training.' A 'Need Help?' button is located in the bottom right corner.

The University of Texas
Rio Grande Valley
Information Security Office

Dashboard Training

My Dashboard Team Dashboard

Training Progress

50% The percent of training assignments completed by your team members within the last year

3 / 6

Team Details for the Last Year View All (4)

0 Training Overdue

0 Training Due Soon

2 Completed Training

All of your team members are up to date on their training.

Need Help?

TRAINING CAMPAIGN OWNERS

Who is a training campaign owner?

A training campaign owner (TCO) is a person who is the owner and manages one or more campaigns in KnowBe4.

What is a campaign?

A campaign is a terminology used in KnowBe4 to refer to a training.

What type of access does a training campaign owner have in KnowBe4?

Training Campaign Owners are able to view materials and training statuses found in the KnowBe4 ModStore.

TCO will need to submit [IT Access Request - Get Access!](#) to be able to view the content in the KnowBe4 application. The trainer will request the Training Campaign Owner role. See sample access request below.

The screenshot shows a web form titled "Get Access!". At the top right, there are links for "+ Show Help" and "- Hide Help". Below the title is a text box with the instruction: "Request access to a University business resource: PeopleSoft, Banner, File Shares, Departmental Emails, etc." The form contains several sections:

- Attachment:** A "Browse..." button and the text "No file chosen".
- Requestor:** A dropdown menu showing "Jose Quezada" with search and clear buttons.
- Category:** A dropdown menu showing "All".
- Resource:** A dropdown menu showing "KnowBe4".
- KnowBe4 Roles:** Radio buttons for "Administrator" and "Training Campaign Owner" (which is selected).
- Description:** A text area containing the text: "I have been designated as the training campaign owner and need access to view/review content in the application. Please grant me Training Campaign Owner role in KnowBe4."

Note: After the "Get Access" request has been submitted, the supervisor of the Training Campaign Owner will automatically receive an email notification to review and approve the request. It will then be processed by the Information Technology (IT) personnel.

What are the requirements to have a training in KnowBe4?

Training Campaign Owners should provide the following to the KnowBe4 administrator:

- ⊕ **Training Material** (either from the ModStore, PowerPoint* or MP4*).
- ⊕ **User Criteria.** Who will be taking the training? What are some of the requirements/criteria.
- ⊕ **Email messages** for assigning, reminding, and completing a training.

Send the material above to KnowBe4Training@utrgv.edu.

*If PowerPoint or MP4 files are too big in file size to include in an email as attachment, please contact one of the Administrators to find an alternative way to send the file.

Training Material

For additional guidance on Training Campaigns and reviewing a campaign, go to “Individual Campaign Overview” found at [Creating and Managing Campaign](#).

Training Campaign Owners are able to view and recommend to an administrator via:

1. Any of the material found in the KnowBe4 ModStore.
2. Creating their own content for their training.

ModStore

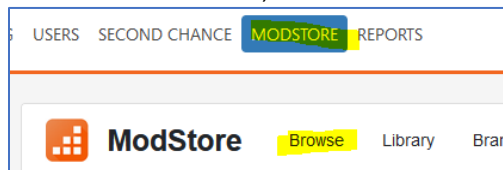
KnowBe4 offers material that can be used to train employees. These include training modules, games, videos, and more. Once selected, they are added to the Library to be able to select and assign to a campaign.



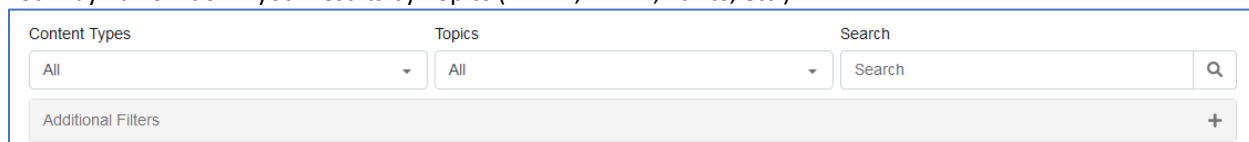
Note: Most of the materials offered in the KnowBe4 Library are focused on *cyber security awareness*, but provides a few other general topics such as HIPAA and FERPA.

By selecting any of these, no edits or modifications can be made to its content.

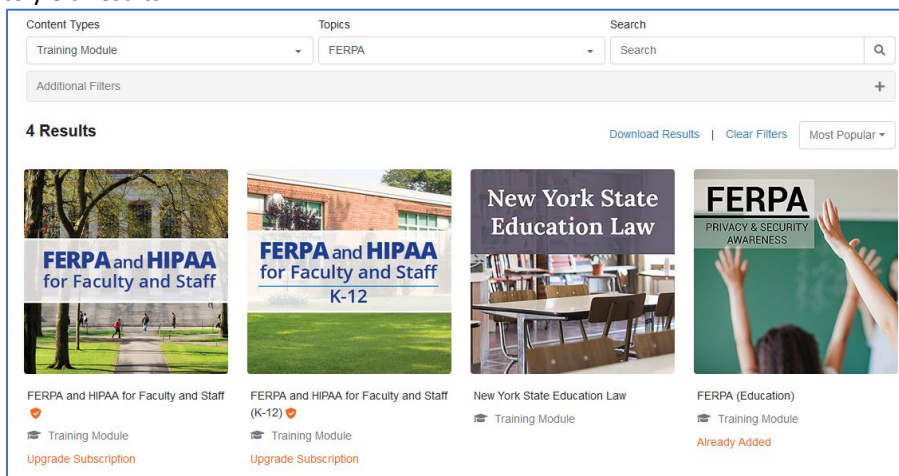
To access their material, click on “MODSTORE” on the top menu options and select “Browse”.



Under “Content Types”, select the type of material you want to use (modules, videos, games, etc.) You may narrow down your results by Topics (FERPA, HIPPA, Ethics, etc.)

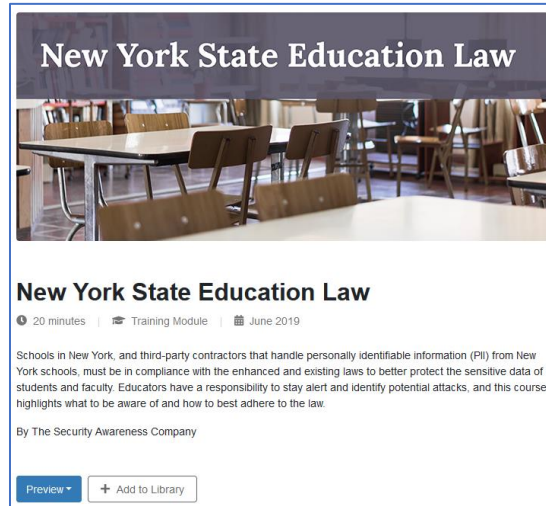


Click on Search to yield results.



Click on the module you would like to use. Note: Those identified as “Upgrade Subscription” cannot be used since it requires an extra fee with KnowBe4. Those as “Already Added” means that it is already available in the library to be used.

Once you click on the module, you can preview the content. If this is a module you would like to use, click on “ + Add to Library”. Keep record of the name of the training module, as you will need to provide this information to the KnowBe4 administrator to prepare the training campaign for you.



Note: Those identified as “Upgrade Subscription” cannot be used since it requires an extra fee with KnowBe4. Those as “Already Added” means that it is already available in the library to be used.

You may go back and add more modules to the library as needed.

Once you have a list of all training modules you would like to use, make sure to communicate to the Administrator the name of each of these modules.

How can a trainer create their own training material?

There are two ways to create customized training materials:

1. Using PowerPoint or
2. video format (MP4).

PowerPoint

It is recommended to use one of the PowerPoint templates provided by the Compliance Office. This is to have a uniform look and feel throughout all the UTRGV customized training materials.

When creating a PowerPoint presentation, try not to have too much text on each slide or make the text too small to read. Try using a font 20 or 24 in either Arial or Cambia.

You should be able insert images and YouTube videos as needed as well as adding animation.

Quiz Questions

If you have any quizzes that need to be added, identify the correct answer. Do not worry about formatting or look since KnowBe4 administrators will need to recreate the quiz questions in the system in order to work correctly.

Regarding the quiz question. There are several options.

1. Stop user from continuing to the next question until they get the right answer.
2. Continue to the next question, but not let them complete training until they have a passing score (at the end of the quiz, questions with the wrong answers will be asked again until they get a passing score).

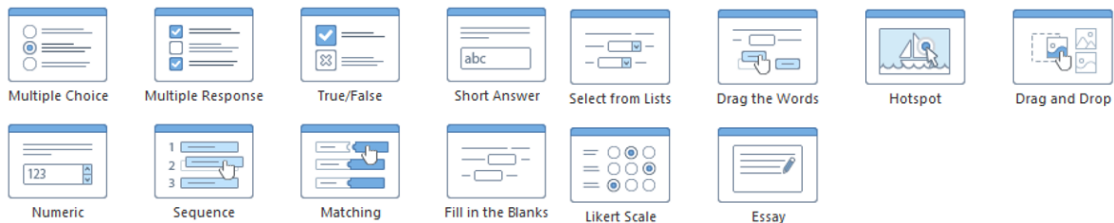
Note: Questions and answers can be set in random order.

Special Features in a presentation

In PowerPoint, there are some additional features that can be added to the training material*. These includes:

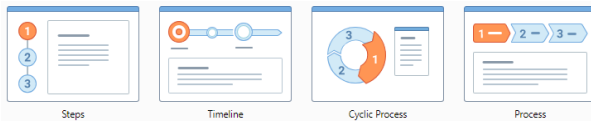
Graded Quiz

Multiple choice, multiple response, true/false, fill in the blanks, short answer, sequence, matching, etc.

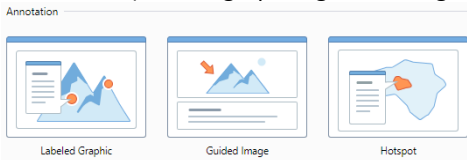


Interaction

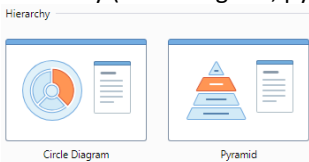
Process (Steps, timeline, cyclic process, process)



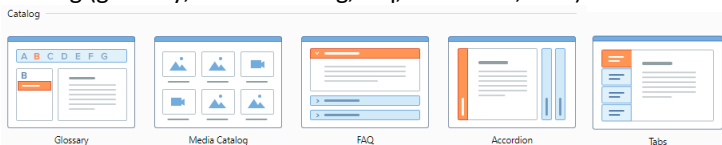
Annotation (labeled graphic, guided image, hotspot)



Hierarchy (circle diagram, pyramid)

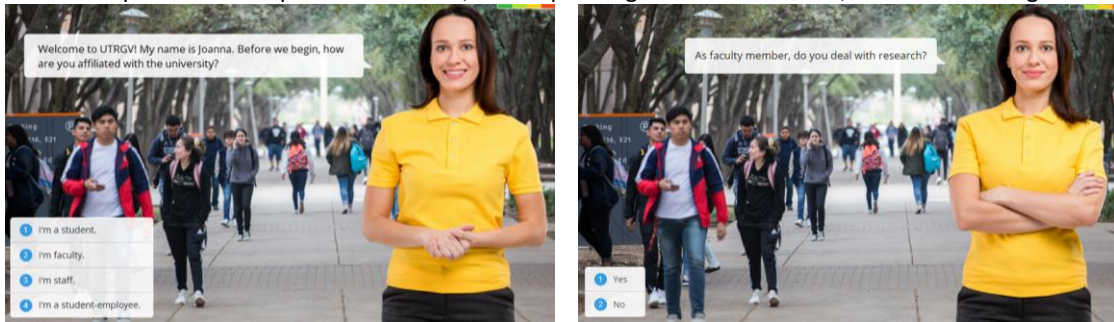


Catalog (glossary, media catalog, faq, accordion, tabs)



Dialog Simulation

Characters ask questions with possible answers, and depending on answer chosen, a different dialog can occur.



**These features can only be created by the Administrator and only through a special software when available.*

MP4

When using MP4, make sure that the video is high quality and audio is understandable. It will require to have a script for any spoken, text or image shown. It will require to have a script for any spoken, text or image shown.

MP4 files can be created out of any video editing software (such as Adobe Premiere, Camtasia or Adobe Captive) and saving in such format.

Another way to create MP4 files is to use PowerPoint. Simply save file as mp4 instead of the standard PowerPoint format. Make sure you have already included the audio in each slide.



Note: When using MP4, users will not have the option to click on any links or have any controls other than pause, play, fast-forward or rewind since the whole training is a video.

Users

Training Campaign Owners need to identify the user criteria for a specific training. For example, Is it for all full-time and part-time employees? Below are the different categories a group can be created from:

- ⊕ **Status:** Is it for both Full-Time and Part-Time employees? Is it only for faculty, staff, or both?
- ⊕ **Division:** Is training based on a specific division(s)?
- ⊕ **Department:** Is training based on a specific department(s)?
- ⊕ **Job Title:** Is training based on a specific job title(s)?
- ⊕ **Special Groups:** (for example, those who are in a specific committee), create a list of the employees' email address in excel and email it to the KnowBe4 Administrator.
- ⊕ **Smart Group:** a dynamic group based on criteria that you choose.
For more information about smart groups, go to, [How to Use Smart Groups – Knowledge Base \(knowbe4.com\)](https://knowbe4.com)

Email Messages

When a campaign is created, there are three types of messages that can be sent automatically:

- ⊕ **Welcome:** Once an employee gets assigned a welcome email message is sent out. This list the training the user is scheduled and contact information.
- ⊕ **Reminder:** Reminder emails are sent periodically to those who have yet to complete training.
- ⊕ **Completion:** Once a training in completed, a confirmation email is sent to employee.

Reviewing Training

Once a campaign is created by the Administrator, a Training Campaign Owner will be able to see all campaigns even if you are not in charge of them. To find the campaign you are responsible for, click on Training from the top menu. Under the Campaigns tab, either search or look for the campaign name and click on the link.

The screenshot shows the 'Training Campaigns' dashboard. At the top, there is a navigation bar with 'TRAINING' highlighted, followed by 'USERS', 'SECOND CHANCE', 'MODSTORE', and 'REPORTS'. Below this, the main heading is 'Training Campaigns' with a '+ Create Training' button on the right. There are four tabs: 'Campaigns' (selected), 'Notification Templates', 'Policies', and 'Reports'. Below the tabs are filters for 'Active', 'Inactive', and 'All', and a search box containing 'being a clery'. A table lists the campaigns with columns for Name, Groups, Content, and Complete %. One campaign is listed: 'UTRGV - Being a Clery Campus Security Authority' with a status of 'In Progress', group 'UTRGV JLQ Test', content 'UTRGV Being a Clery Campus Security Authority', and '0% Completed'.

The "Overview" tab contains a dashboard showing completion percentage and additional information.

The screenshot shows the 'Campaign Overview' dashboard for the campaign 'UTRGV Being a Clery Campus Security Authority'. The top left shows the campaign name and a progress bar indicating '0% Completed'. Below this is a 'User Progress' section with a 'User Completion Activity' chart showing the number of users who have not completed their assignments over time. The chart shows a line at 2 users from 14 Mar to 28 Mar. On the right, the 'Campaign Summary' section includes a circular progress indicator showing '0% Completed All Content', a status of 'In Progress', a start date of '03/08/2022, 8:00 AM', an end date of '(No End Date)', 2 users, and auto-enroll set to 'Yes'. There is also a section for 'Scheduled Notifications'.

The “Users” tab contains options to see all users, those incomplete, not started, in progress or completed.

The screenshot shows the 'Users' tab in the KnowBe4 interface. At the top, there are three tabs: 'Overview', 'Users', and 'Survey Results'. Below the tabs is a summary dashboard with five colored boxes representing different user statuses: 'All Users' (2), 'Incomplete' (2, 100%), 'Not Started' (1, 50%), 'In Progress' (1, 50%), and 'Completed' (0, 0%). Below the dashboard is a search bar for users by name or email, a toggle for 'Include Archived Users', and buttons for 'Bulk Update', 'Generate CSV', 'Enroll Users', and 'Actions'. The main part of the screenshot is a table with the following columns: 'Content Name', 'Enrollment Date', 'Content Started', 'Time Spent', 'Time Remaining', 'Score', and 'Status'. The table contains three rows of data:

Content Name	Enrollment Date	Content Started	Time Spent	Time Remaining	Score	Status
Jose Quezada						
UTRGV Being a Clery Campus Security Authority	03/08/2022	✓	22:36	-	-	In Progress
Maria Dominguez						
UTRGV Being a Clery Campus Security Authority	03/08/2022		00:00	-	-	Not Started

By selecting one or more, there is an “Action” button on top of the list that will allow you to send an email notification, mark a training as completed or reset the progress.

This close-up screenshot shows the 'Actions' dropdown menu. The menu is open, displaying three options: 'Send Notification' (with an envelope icon), 'Mark as Completed' (with a person icon), and 'Reset Progress' (with a circular arrow icon). The background shows a portion of the table with columns for 'All Users' and 'Score'.

For additional guidance on reviewing campaign, go to “Individual Campaign Overview” found at [Creating and Managing Campaign](#).

CLOSED CAPTIONING WITH VIDEOS CREATED WITHIN UTRGV FOR USE ON KNOWBE4

All internally created and compiled videos (MP4 format) are required to have CLOSED CAPTIONING.

The KNOWBE4 application does NOT automatically generate Closed Captioning.

The TCO will need to create and compile a WebVTT formatted file.

The WebVTT can be created using NOTEPAD. However, when creating the WebVTT file there are some requirements to properly display the Closed Captioning while the video plays.

- Creating WebVTT files to accompany the video.
 - o Please visit <http://w3.org/TR/webvtt1> and use the content on that website as a guide in building your own WebVTT file. Specifically, scroll down to the section titled, “1.1.A A simple caption file” as this offers a great example and information on creating the WEBVTT file.

- KEY THINGS TO REMEMBER WHEN BUILDING THE WEBVTT FILE
 - o First line must contain: WEBVTT
 - o The start and end timecodes of the caption must have two dashes and greater than sign to properly track duration -->
 - o When ready to upload the WEBVTT file it must be uploaded at the same time as the video.
 - o If the WEBVTT file needs to be modified and re-uploaded, then BOTH the VIDEO and the WEBVTT files will need to be uploaded again into KNOWBE4. Failing to do so will not display the video with closed captioning.