

ALEXANDRIA FONTANA

Training Your Employees with Tandem



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Disclaimer

A FEW THINGS FIRST

This presentation is for information only.

Evaluate risks before acting based on ideas from this presentation.

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Alexandria Fontana

Tandem Software Specialist,
CSXF



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Agenda

TANDEM TRAINING

Why We Train

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What We Train

How We Train

3



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Why We Train

TRAINING YOUR EMPLOYEES WITH TANDEM

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WHY WE TRAIN

No amount of natural intuition can replace consistent and effective training



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WHY WE TRAIN

Parodime

Paradigm



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Information Security Program

WHY WE TRAIN



8



What We Train

TRAINING YOUR EMPLOYEES WITH TANDEM

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Training Goals

WHAT WE TRAIN



Effectiveness



Education



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Tandem Training Integrations

WHAT WE TRAIN



Identity Theft Prevention



Incident Management



Phishing



Policies



Social Media Management



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Tandem Training Courses

WHAT WE TRAIN



Identity Theft Red Flag Training



Security Incident Management Training



7 Signs of Phishing
How Does Spear Phishing Work?
Phishing Training
Security Awareness Training
What to Know About Phishing



Acceptable Use Policy Training
Security Awareness Training




































Social Media Employee Training



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Training Course Source

WHAT WE TRAIN

Course ▲	Source	Estimated Time to Complete	Created
   7 Signs of Phishing	Tandem	10 minutes	11/20/2020
   Acceptable Use Policy	Your Organization	28 minutes	04/16/2020
   How Does Spear Phishing Work?	Tandem	10 minutes	11/19/2020
   Identity Theft Red Flag Training	Your Organization	64 minutes	04/16/2020
   Phishing Training (v1.0)	Tandem	12 minutes	04/17/2020
   Security Awareness Training (v4.0)	Tandem	85 minutes	05/03/2016
   Security Awareness Training (v5.0)	Tandem	68 minutes	04/15/2020
   Security Awareness Training (v6.0)	Tandem	67 minutes	11/30/2021
   Security Incident Management Training	Tandem	76 minutes	04/20/2021
   Social Media Employee Training	Your Organization	17 minutes	04/16/2020
   What to Know About Phishing	Tandem	10 minutes	11/18/2020



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How We Train

TRAINING YOUR EMPLOEES WITH TANDEM

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Tandem Training

HOW WE TRAIN

- Training Admin Features
 - Enrolling Your Employees
 - Creating Projects
 - Reports and Downloads
- Employee Features
 - Notifications
 - User View
 - Course Player



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Tandem Training Update

HOW WE TRAIN

The screenshot displays the 'CoNetrix Demo Bank' interface. On the left, the 'Users' management page is visible, featuring a sidebar with 'Getting Started', 'Users', 'Courses', and 'Course Summaries'. The main content area is titled 'Users' and includes a section 'I want to...' with the question 'What would you like to do?'. Below this, there are two sections: 'Course Enrollment' and 'User History', each with radio button options for various actions like 'Enroll user(s)', 'Revoke a course enrollment', 'Change Status of an enrollment', 'Create Internal course history for a user', 'Create External course history for a user', 'Reset Enrollment for a user', and 'Reset Lesson for a user'. At the bottom of this section are 'Back', 'Next', and 'Cancel' buttons.

Overlaid on the right is a video player window titled 'FullSAT Course (4) - Google Chrome'. The video content shows a close-up of hands typing on a keyboard, with the text 'SECURITY AWARENESS TRAINING' and 'Provided by CoNetrix' overlaid. Below the video, the text 'Malicious Software' is visible. The video player includes standard playback controls like play, pause, and volume.

At the bottom of the video player, there are instructions: 'You may assign a due date' and 'Click Finish', followed by an 'Enroll Group' button.

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Enrolling Your Employees

TRAINING ADMIN FEATURES

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Types of Employees

TRAINING ADMIN FEATURES

Employee
Records

Tandem
Access

No Information
in Tandem

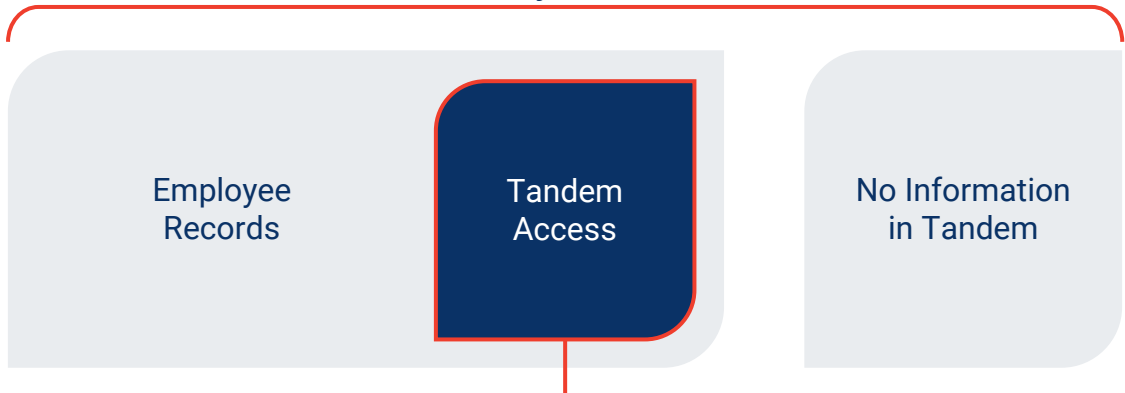


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Ways to Enroll

TRAINING ADMIN FEATURES

Enroll Directly Into the Course



Enroll Through Projects

Training User Access Role



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Enrolling Your Employees

TRAINING ADMIN FEATURES

General + Open

- Dashboard
- My Courses
- Courses**
- Lessons
- Projects
- Reports
- Download Documents

- Knowledge Base
- Settings

Courses

Keywords

Source:

Tag:

Start Date:

End Date:

Displaying 1 - 11 of 11 < Previous 1 Next >

Course	Source	Estimated Time to Complete	Created
7 Signs of Phishing	Tandem	10 minutes	11/20/2020
Acceptable Use Policy	Your Organization	28 minutes	04/16/2020
How Does Spear Phishing Work?	Tandem	10 minutes	11/19/2020



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Enrolling Your Employees

TRAINING ADMIN FEATURES

General + Open

- Dashboard
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- Courses**
- Lessons
- Projects
- Reports
- Download Documents
- Knowledge Base
- Settings

Acceptable Use Policy Course Enrollment

Keywords Employee Position Committee Location Status Date: From 03/26/2021 Apply

+ Enroll Selected Users Bulk Import Enrollees

Displaying 1 - 82 of 82 < Previous 1 Next >

<input type="checkbox"/>	First Name	Last Name	Status	Enrollment Date	Due Date	Result
<input type="checkbox"/>	Adam	Steven	Complete	03/24/2022	04/16/2022	Failed
<input type="checkbox"/>	Alexandria	Fontana	In Progress	03/25/2022	04/16/2022	In Progress
<input type="checkbox"/>	Alyssa	Pugh	Not Enrolled			
<input type="checkbox"/>	Apple	Review	Not Enrolled			
<input type="checkbox"/>	Austin	Lee	Not Enrolled			
<input type="checkbox"/>	Bethany	Long	Enrolled	03/24/2022	04/16/2022	

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Enrolling Your Employees

TRAINING ADMIN FEATURES

General + Open

- Dashboard
- My Courses
- Courses**
- Lessons
- Projects
- Reports
- Download Documents
- Knowledge Base
- Settings

Enrollment Confirmation

Acceptable Use Policy

Enrollees		
First Name	Last Name	Email Address
Austin	Lee	alee@tandem.app

Lessons

Lesson	Estimated Time to Complete	Graded	Score Needed
Acceptable Use Policy	28 Minutes	Yes	100%

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Enrolling Your Employees

TRAINING ADMIN FEATURES

Course Options

Show Answers

Maximum Attempts Allowed

Due Date *



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Enrolling Your Employees

TRAINING ADMIN FEATURES

Notification

Notify Enrolled Users

Email Reply To *

Subject *

Email Message *

\$(ContactName),
You have a new training course enrollment. Please use your unique link below to take the course.

Preview Email



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Enrolling Your Employees

TRAINING ADMIN FEATURES

General + Open

- Dashboard
- My Courses
- Courses**
- Lessons
- Projects
- Reports
- Download Documents
- Knowledge Base
- Settings

Acceptable Use Policy Course Enrollment

Keywords Employee Position Committee Location Status Date: From 03/26/2021 X Apply

+ Enroll Selected Users
Bulk Import Enrollees

Displaying 1 - 82 of 82 < Previous 1 Next >

<input type="checkbox"/>	First Name	Last Name	Status	Enrollment Date	Due Date	Result
<input type="checkbox"/>	Adam	Stevens	Complete	03/24/2022	04/16/2022	Failed
<input type="checkbox"/>	Alexandria	Fontana	In Progress	03/25/2022	04/16/2022	In Progress
<input type="checkbox"/>	Alyssa	Pugh	Not Enrolled			
<input type="checkbox"/>	Apple	Review	Not Enrolled			
<input type="checkbox"/>	Austin	Lee	Not Enrolled			
<input type="checkbox"/>	Bethany	Long	Enrolled	03/24/2022	04/16/2022	



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Enrolling Your Employees

TRAINING ADMIN FEATURES

General + Open

- Dashboard
- My Courses
- Courses
- Lessons
- Projects
- Reports
- Download Documents
- Knowledge Base
- Settings**

Settings

Domains

The table below displays domain names which can be used when using the bulk import option to enroll employees in a training course.

[Contact us](#) if you need an additional domain name added to allow additional employees to be enrolled in training.

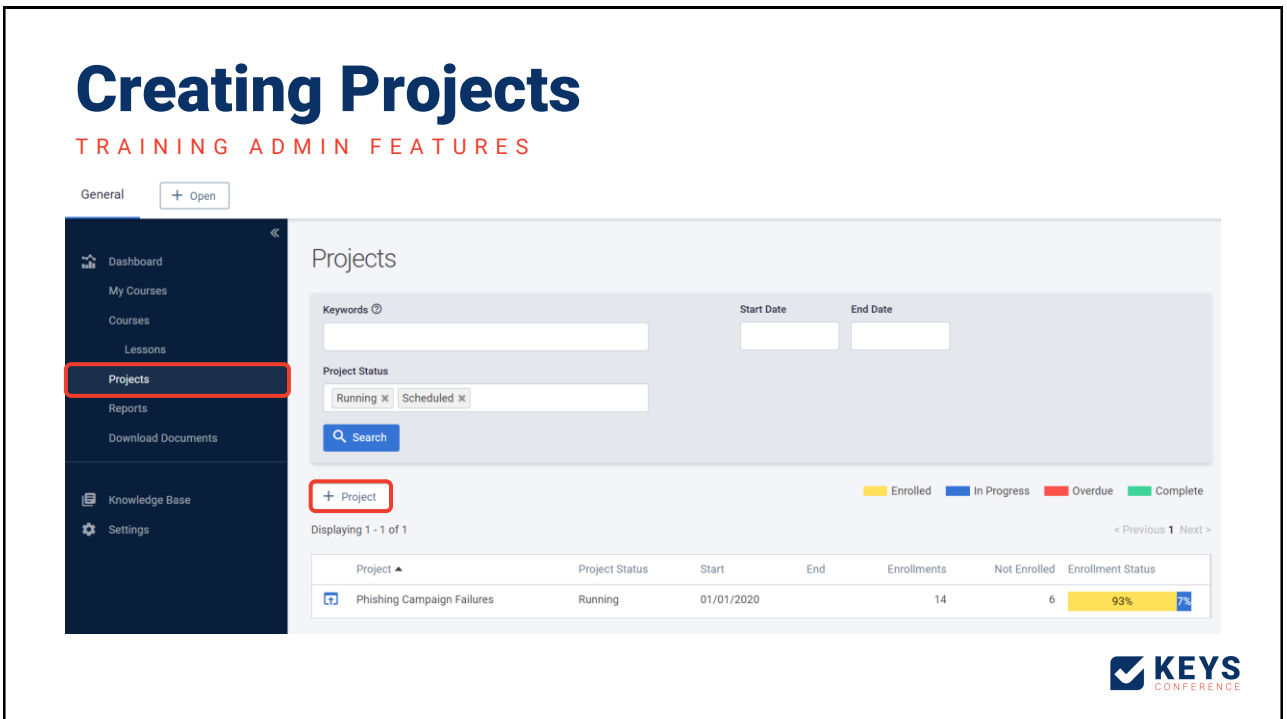
Domain Name
tandem.app



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Creating Projects

TRAINING ADMIN FEATURES

General + Open

Due Date for Selected Courses

No Due Date

Days After Enrollment

date or a set number of days after an individual is enrolled in the course

+ Course

Dashboard
My Courses
Courses
Lessons
Projects
Reports
Download Reports
Knowledge Base
Settings

KEYS CONFERENCE

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Creating Projects

TRAINING ADMIN FEATURES

Notification

Use the Enrollments page in the project to optionally notify enrolled employees of training using the following wording. Mark the Automatically Notify Enrolled Users checkbox to automatically send notifications each time an individual is enrolled in a course within the project.

Automatically Notify Enrolled Users

Email Reply To *

Subject *

Email Message *

You have a new training course enrollment. Please follow the instructions below to take the course.

- Go to <https://secure.tandem.app/TrainingCourseEnrollments/MyCourses>
- Your **Username** will be your bank email address.

KEYS CONFERENCE

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Creating Projects

TRAINING ADMIN FEATURES

General Phishing Campaign

Dashboard
Project
Enrollments
Knowledge Base

Create Member Group

Name *

Spring 2022 Failures


Members

Type	Name
<input checked="" type="checkbox"/> <input type="checkbox"/> Phishing Campaign *	Your Password *

+ Members

Auto-Enroll ⓘ

Member Groups
Enrollment Preview



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Creating Projects

TRAINING ADMIN FEATURES

Enrolled

First Name	Last Name
<input type="checkbox"/> Samantha	<input type="checkbox"/> Torrez

Not Enrolled

[Show Ignored](#)

<input type="checkbox"/>	First Name	Last Name	Course
<input type="checkbox"/>	Emma	Peña	7 Signs of Phishing, What to Know About Phishing

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Reports and Downloads

TRAINING ADMIN FEATURES

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Reports and Downloads

TRAINING ADMIN FEATURES

Reports

Work that you
need to do

Downloads

Work that you've
already done



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Reports and Downloads

TRAINING ADMIN FEATURES

General + Open

Users who are enrolled but haven't started their course(s)

Users who have started their course(s)

Users who have completed their course(s)

Users whose enrollments are overdue

Course	Enrollments	Enrollment Status
7 Signs of Phishing	Tandem	5 90% 20%
Acceptable Use Policy	Your Organization	43% 20% 14% 14%
How Does Spear Phishing Work?	Tandem	6 100%
Security Awareness Training (v6.0)	Tandem	1 100%
What to Know About Phishing	Tandem	6 83% 17%

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Reports and Downloads

TRAINING ADMIN FEATURES

General + Open

- Dashboard
- My Courses
- Courses
- Lessons
- Projects
- Reports**
- Download Documents
- Knowledge Base
- Settings

Overdue Enrollments

[< Back to Reports](#)

Keywords

Start Date End Date

Course

🔍 Search

Displaying 1 - 1 of 1 < Previous 1 Next >

First Name	Last Name	Course	Enrollment Date	Due Date	Status
Samantha	Torrez	Acceptable Use Policy	08/04/2021	08/18/2021	Overdue



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Reports and Downloads

TRAINING ADMIN FEATURES

General + Open

Save Filter Set

Load Filter Set

Name

[Course Player Updates](#)

Date	From	To	Action	Details
03/25/2022 8:53 AM	astevens@tandem.app	Training Player	Update	Course: Acceptable Use Policy
03/24/2022 11:42 PM	alex.demo@tandem.app	Training Projects	Create	Course: Security Awareness Training (v6.0) Employee: Emma Peña
03/24/2022 11:22 PM	alex.demo@tandem.app	Training Projects	Create	Annual Training

KEYS CONFERENCE

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Reports and Downloads

TRAINING ADMIN FEATURES

General + Open

Training by Date

< Back to Reports

First Name	Last Name	Course	Enrollment Date	Due Date	Status
Frances	Hardy	How Does Spear Phishing Work?	04/20/2021		Enrolled
Emma	Peña	What to Know About Phishing	06/30/2021		Enrolled
Emma	Peña	Phishing Training (v1.0)	06/30/2021		Enrolled
Austin	Lee	Phishing Training (v1.0)	09/03/2021		Enrolled
Bethany	Long	Acceptable Use Policy	03/24/2022	04/16/2022	Enrolled
Adam	Stevens	Acceptable Use Policy	03/24/2022	04/16/2022	Complete
Samantha	Torrez	Security Awareness Training (v6.0)	03/24/2022	04/08/2022	Enrolled
Alexandria	Fontana	Acceptable Use Policy	03/25/2022	04/16/2022	In Progress

KEYS CONFERENCE

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Reports and Downloads

TRAINING ADMIN FEATURES



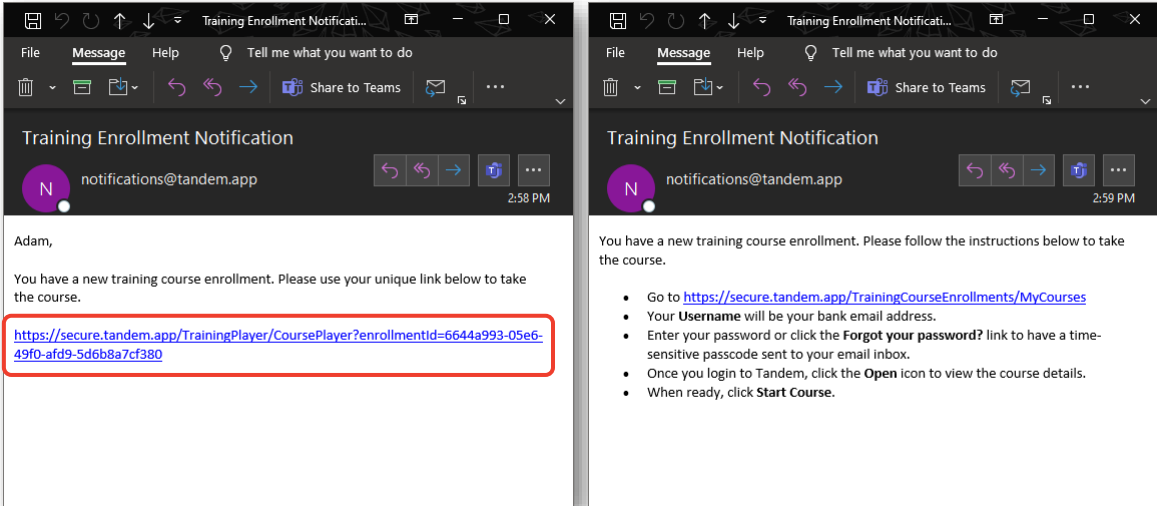
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Notifications

USER FEATURES



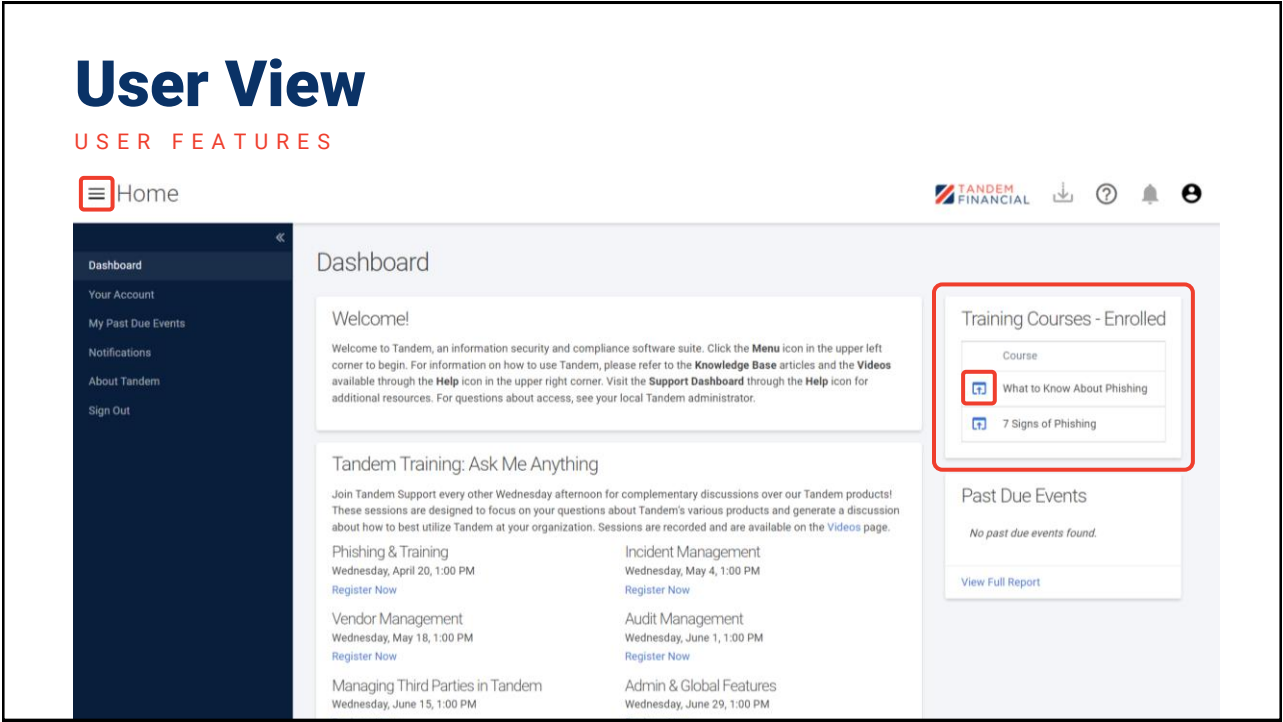
41



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User View

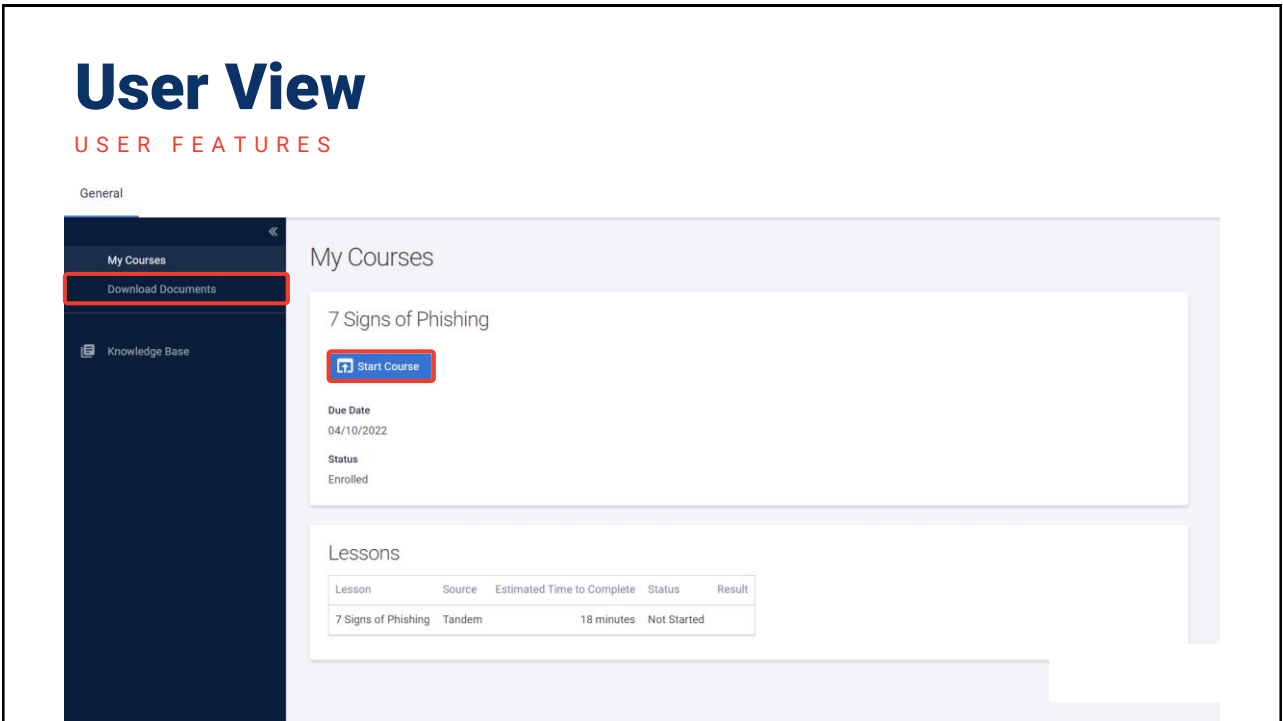
USER FEATURES



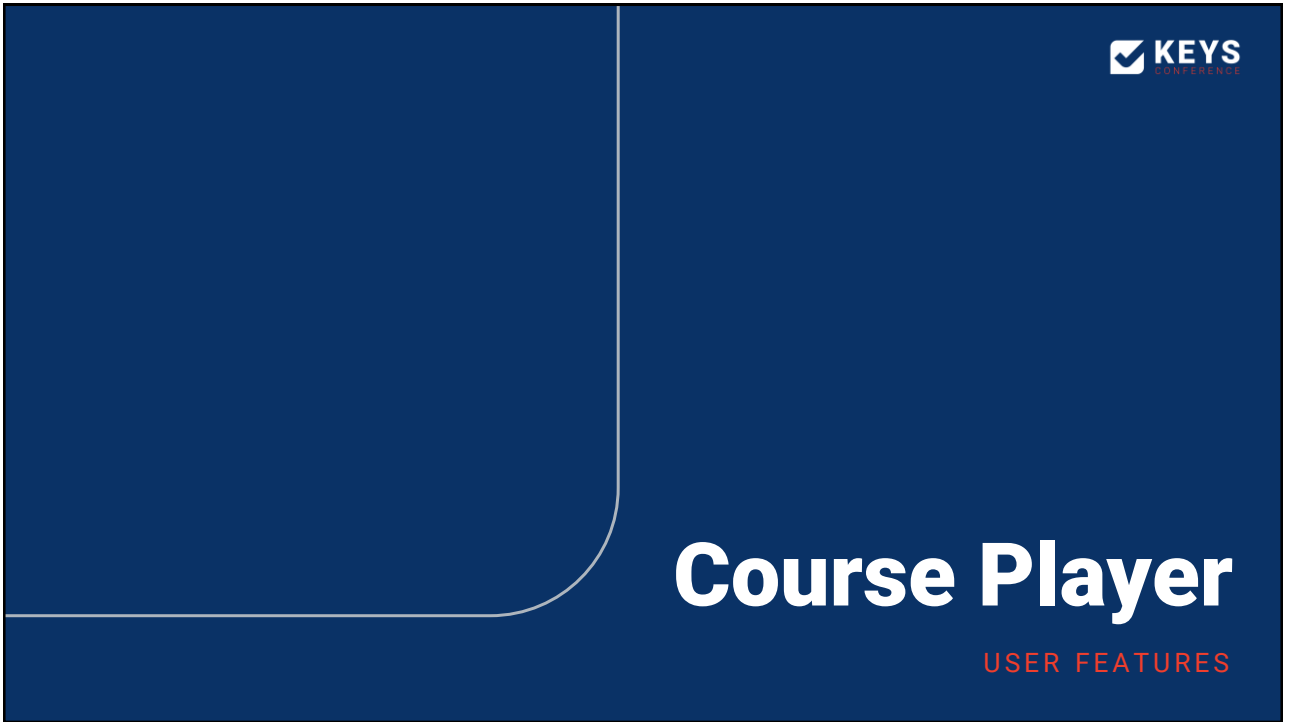
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User View

USER FEATURES



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Security Incident Management Training

Course Summary

Lessons Overview

Lesson	Graded	Score Needed
About Security Incident Management	Yes	80%
Preventing Security Incidents	Yes	80%
Detecting Security Incidents	Yes	80%
Responding to Security Incidents	Yes	80%

Lessons

- About Security Incident Management
 - Introduction
 - What is "Security"?
 - What is a "Security Incident"?
 - How a Security Incident Affects the Organization
 - How a Security Incident Affects You
 - The Incident Management Plan
 - Question 1
 - Question 2
 - Question 3
 - Question 4
 - Question 5
- Preventing Security Incidents
 - About Preventing Security Incidents
 - Follow Acceptable Use Policies
 - Install Patches and Updates

[Begin Course](#) [Close](#)

Tandem

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Security Incident Management Training
Lessons 1/4

ABOUT SECURITY INCIDENT MANAGEMENT

THE INCIDENT MANAGEMENT PLAN

To help identify, analyze, and correct incidents when they occur, the organization has implemented an incident management plan. The goal of the plan is to limit disruptions and restore operations as quickly as possible if an incident occurs.

You play a key role in this plan. For the incident management plan to be most effective, you must know how to prevent, detect, and respond to security incidents.

Introduction

What is "Security"?

What is a "Security Incident"?

How a Security Incident Affects the Organization

How a Security Incident Affects You

> The Incident Management Plan

Question 1

Question 2

Question 3

Question 4

Question 5

Preventing Security Incidents

About Preventing Security Incidents

Follow Acceptable Use Policies

Install Patches and Updates

← Back
Next →
Slide 6 of 56
Save & Close

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Question Types

Multiple Choice (Single Answer)

USER FEATURES

Multiple Choice (Multiple Answers)

Which of the following is a sign an email address may be incorrect?

(Select all that apply)

- Typos in the email address.
- Mismatched name and email address.
- Email domain different from sender's website.
- None of the above.

Which of the following is not part of the CIA triad?

- Criticality
- Integrity

I affirm I have read, understand, and agree to comply with this Acceptable Use Policy. I understand failure to abide by any of the provisions of this policy may result in disciplinary action up to and including immediate termination, without warning or notice. I recognize these systems are bank property, and the bank reserves the right to monitor usage for any reason at any time. My e-signature below means I have consented to this monitoring. I understand should I become aware of any misuse of bank systems; I am obligated to inform my supervisor, bank management, or the Security Administrator immediately. I will not hold the bank responsible for exposure to potentially offensive material via Tandem Financial's Internet connection.

- Disagree
- Agree

Acknowledgement

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Security Incident Management Training

Course Summary

When you are ready, click the **Submit Course** button below and the lesson(s) will be scored.

Lessons Overview

Lesson	Status	Graded	Result
About Security Incident Management	Complete	Yes	Pending
Preventing Security Incidents	Complete	Yes	Pending
Detecting Security Incidents	Complete	Yes	Pending
Responding to Security Incidents	Complete	Yes	Pending

✔ Submit Course
← Back

Lessons

- Question 5
- Responding to Security Incidents
- About Responding to Security Incidents
- Be Safe
- Report Suspicious Activity
- Provide Helpful Information
- Follow Their Instructions
- Do Not Share Information
- Do Not Respond to Media Requests
- Cooperate with the Incident Response Team
- Conclusion
- Question 1
- Question 2
- Question 3
- Question 4
- Question 5

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TRAINING YOUR EMPLOYEES WITH TANDEM

If Tandem Training could include any other courses, what would you like to see?

Recent Releases and Future Growth + Tandem User Group Discussion

TODAY
3:20 PM
MAIN SESSION

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How Does Tandem Train?

SUPPORT DASHBOARD

The screenshot shows a support dashboard for Tandem Training. At the top, it says 'TANDEM TRAINING'. Below this are several tiles:

- Knowledge Base**: Search the Knowledge Base to find the product and answers to common questions.
- Software Updates**: View Software Updates to learn what's new in the product.
- Intelligence**: Download intelligence files, including our Insurance, W9, SOC report, and more.
- Videos**: Watch recordings of recent Tandem webinars and security education sessions.

 A large, dark blue banner with white text reads 'ASK ME ANYTHING'. A red ribbon with white text reads 'TRAINING FOR YOU • RAN BY YOU'. A red circular icon with a white 'E' is also visible.

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Summary

TRAINING YOUR EMPLOYEES WITH TANDEM

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Summary

TANDEM TRAINING

Why We Train

1



What We Train

2

How We Train

3





DON'T FORGET!

Fill out the survey to get your sticker!

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THANKS FOR JOINING!

Training Your Employees with Tandem

Alexandria Fontana
TANDEM SOFTWARE SPECIALIST, CSX
AFONTANA@TANDEM.APP

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Upcoming Sessions

TANDEM

Up and Running with Audit Management Pro

Christopher Hidalgo, CoNetrix Security

RISK & COMPLIANCE

How to Write a Policy

Alyssa Pugh, Tandem

CYBERSECURITY

Best Practices for Mitigating Risks of a Digital Experience Platform

Brad Hunt & Dusty Ellis, Smooth Fusion

