

First-Time User's Tutorial

This tutorial walks the first-time user through the process of learning the most commonly used functions in ABS. This tutorial is also available within the downloaded ABS program.

Introduction

The first part of ABS is called the Developer Program, which is used for creating briefings. Another part of ABS, called the Presentation Program, presents the briefing to others. You create the briefing by inputting research links to information that is available electronically, either on your network or on the Internet. You can require that persons receiving the briefing read this material. You also input questions that briefing recipients must answer to confirm that they have read and understand the research information. In other words, the briefing consists of links to information that people are required to read and a quiz to test their understanding of this reading material.

When you start the program, ABS offers three "Subject Areas" for demonstration purposes. While a Subject Area can have multiple briefings, these initial Subject Areas only have one briefing each. These briefings demonstrate the types of briefings you can create and help you get started with your own briefings. As an initial orientation to ABS:

1. Double-click the **Information Security** Subject Area.
2. Then double-click the **Annual Refresher Briefing - Demo** in that Subject Area. This opens the Briefing Profile for this briefing. This is the focal point for creating or editing a briefing. Look around the Briefing Profile to see the various functions that are available.
3. Your next step in learning ABS is to click the **Run Briefing** button. This opens the Presentation Program that presents this briefing to those whom you want to brief. When you activate **Run Briefing** from within the Developer Program, however, it presents the briefing only to you.
4. Now, run the briefing, do the research, and answer the questions. This gives you some experience with the type of program you can create in ABS. As you create or edit briefings, click **Run Briefing** often to ensure that the briefing is running as intended.
Note: The briefing requires that you navigate back and forth between the research reading and the questions to be asked about that reading. To return from the reading back to ABS, click on the appropriate button on the task bar at the very bottom of the screen. When taking the briefing in a client-server environment, the ABS button is marked with an American flag logo. In a web environment, it is a browser button with the name Automated Briefing System.

The presentation is not like most professionally developed computer-based training (CBT). It is basic and simple - nothing fancy, no graphics. The tradeoff, as compared

with a professionally developed CBT, is that with ABS you can do it yourself, quickly, and at no cost. It is easy to update or modify the briefing for different audiences. It also generates an electronic record of everyone who has taken the briefing.

Edit/Create Questions

After running the briefing, the Briefing Profile automatically reappears. In this Briefing Profile, look on the Briefing Questions tab to view the questions you just answered. Now click the **Select/Edit Question** button and you will see the same questions. The same questions are on both lists. This is because there is only one briefing in this Subject Area, and all of the available questions are in that briefing. When you create new questions or another briefing in the same Subject Area, those questions are added to the general list of questions. If you have selected an existing Briefing Profile or created a new one, new questions can be added to the Briefing Questions tab. Use the Briefing Questions tab to set the order in which questions are asked.

To see how questions are created, double-click one of the True-False questions on either the Briefing Questions tab or on the general questions list. Look at where the question statement is entered, then the research instructions if any, the answers, feedback, and feedback links.

Get started by practicing how to edit questions or to create more questions in one of the existing briefings. To create a new question, click the **Create New Question** button and then select the type of question - True-False, Multiple Choice, Fill-in-the-Blank, and Short Answer. Start with a True-False question, as those are easiest to do. Then, click **Run Briefing** again and confirm that the question appears as you intended.

Modify an Existing Briefing

Let's assume that you want to modify one of the existing briefings and use it as your own briefing.

A. Questions. You already know how to add questions. To remove a question, select the question and click **Remove Question**. This removes the question from the briefing but keeps it on the list of active questions in the Subject Area. It remains available to be added to this or any other briefing in the same Subject Area. (To Retire or Delete a question, click on the **Select/Edit Question** button to go to the list of all questions within the Subject Area. Clicking on **Retire Question** marks it as inactive and drops it down to the bottom of the list. It can be reactivated at any time. Retiring a question makes it easier to manage a long list of questions. A click on **Delete Question** *permanently* removes the question from ABS.

B. Rename the briefing. You will want to change the name of the briefing, as the current briefing is called a demo. On the Briefing Profile, change the briefing name by deleting the word Demo.

C. Instructions. Respondents need to be instructed how to navigate through the briefing, including how to return to ABS after reading the required research material. The demo

briefings are set up to run in a client-server environment. Respondents are instructed to return to ABS by clicking on the American flag logo at the bottom of their screen. If the briefing is run in a web environment, this needs to be changed. Respondents should be instructed to either close the research window or click on the browser button marked Automated Briefing System at the bottom of their screen.

D. Passing Score. If you have changed the number of questions, you may wish to adjust the Passing Score, which is found on the Administrative tab.

E. Certificates. Decide whether or not to print certificates and, if so, the certificate design. This can set the program for either the respondent to print his or her own certificate of completion or for you, the developer, to print all the certificates. Again, use the Administrative tab.

F. URLs. To make the demo briefing your own briefing, you will probably want to change the URLs for the research links. Research links in the demo briefings are to the Security Guide at this URL: www.rjhresearch.com/SecurityGuide/Home.htm. If you have the Security Guide on your own website or network, change the URLs to that location so that your personnel become familiar with where to find the Security Guide on your network. One way to change all the URLs is to edit the questions one at a time. A faster way is to go to the Tools menu and select **Save for Global Edit**.

G. Global Edit.

1. The **Save for Global Edit** feature downloads all the data entries for the current briefing to a file that can be edited by most word processing software, such as Microsoft Word.
2. Then do a spell check of the entire briefing, edit any of the questions, and change the URLs all in one file. To avoid mistakes when typing web addresses, navigate to the desired web page and then copy and paste the web address from your browser into the ABS program.
3. Next, save the changes.
4. Finally, to implement these changes in the database, go to the Tools menu again and select **Upload from Global Edit**.

Create a New Briefing

Creating a new briefing gets more complicated, as there are so many options to choose from.

A. New Subject Area vs. Existing Subject Area. Your first decision is whether to create a new Subject Area or use an existing Subject Area. If you want to use some of the existing questions in your new briefing, keep that briefing in the same Subject Area, as you cannot copy or move questions from one Subject Area to another. If there will be

little overlap of questions, create a new Subject Area. To create a new Subject Area, click the **Create/Select Subject Area** button. To create a new briefing within the selected Subject Area, click the **Create Briefing Profile** button.

B. Frequency and Timing. You will also need to make decisions concerning the timing and frequency of the research, timing and frequency of the feedback, and the order of questions. ABS offers flexibility as to when briefing recipients are asked to do research. They can be asked to do research only once before to taking the quiz, before each question, or before a group of questions. Determine this by where and how you enter the research instructions. Or ABS can be used to present a quiz on current knowledge with no reading or research required - for example, to present a quiz after an oral briefing to test how much is remembered or after a video briefing over the Internet to make certain it was actually watched.

C. Feedback. The feedback interval is set in the Briefing Profile - after each question, after a specified number of questions, or only at the end of the briefing. If the feedback advises that an answer is incorrect, the default procedure is that the briefing recipient is required to go back to the research before going on to the next question. If you do not want to require research after an incorrect answer, deactivate the **Research Required If Incorrect** button on the Briefing Profile.

D. Briefing Questions. If **Questions Selected by Developer** is active on the Briefing Profile's Administration tab, you work with a fixed number of questions that are selected from all the questions available in that Subject Area. Use the Briefing Profile's Briefing Questions tab to add these questions to the briefing. Further, using this tab, you can change the order of the questions to appear in random order. With a random order, each recipient of the briefing gets these same questions in a different order. Alternatively, if **Questions Selected by Computer** is active on the Briefing Profile's Administration tab, each briefing recipient gets a set number of questions that are randomly selected from all the active questions in the Subject Area.

Customize the Presentation Program

Before conducting a live briefing, you may wish to customize your presentation by going to the Tools menu and selecting **Customize**. The Customized panel appears. Here are some ways to customize the presentation:

1. **Seal or Logo.** Replace the Defense Security Service seal with your own organization's seal or logo. This usually requires the help of a graphic artist. Refer to the User Manual for more information.
2. **Program Name.** Instead of Automated Briefing System, for example, you could call it Smart Corp. Briefing System, or Security Awareness Briefing.
3. **Program Administrator.** This information appears in the About panel that users access via the Help menu. Review the information that appears. Customize this

information entering your name, phone number, and email address as the point of contact.

4. **Unit/Offices.** If you have a large organization with multiple organizational units, you may want persons taking the briefing to enter their unit or office designation. The default setting is that the unit/office designation is requested. If this is not needed, uncheck the box that says **Use Unit/Office Designators**. If you want to sort the briefing results by unit/office designator, keep the check in this box. To create a menu of standardized unit abbreviations, go to the Tools menu and select **Enter Units/Offices**.

5. **Web Browser Print Instructions.** Use this to enter instructions about printing certificates.

Present the Briefing

How you make the briefing available to others depends upon whether you do this in a **client-server environment** or a **web environment**. The Presentation Program works in either one, but procedures for installing ABS on your server are different for each type of presentation. The mechanics for presenting the briefing also depend upon the size of your organization. That is, how many people will be taking the briefing and accessing the database at the same time. If too many people try to access the ABS Microsoft Access database simultaneously, the computer response time may slow down. Larger organizations that have SQL Server available may wish to use that instead to ensure a rapid response time under all circumstances.

Note: You will need the assistance of your system administrator or webmaster. Technical instructions are on the web site where you downloaded ABS, in a file called Presenting the Briefing. If you have not already done so, print that file for use for your system administrator or Webmaster. This and other information your system administrator or Webmaster might need to help you with this program is available in Part III of the User Manual.

Inform your personnel about the requirement to take an automated briefing and how to access it electronically.

- A. In the **client-server environment**, you may wish to retire (*not delete*) all briefings except the one you want to present. If more than one briefing is active, respondents have to select the appropriate briefing from a menu of active briefings. If the active briefings are in more than one Subject Area, respondents will first have to select the Subject Area and then the specific briefing.
- B. When the briefing is conducted in a **Web environment**, give the respondents a specific Web address (URL). That address takes the respondent to the specific briefing regardless of how many briefings are active or what Subject Area they are in.

Send Briefings by Email

Under the Tools menu, the **Export** and **Import** functions facilitate the sharing of briefings. If you have developed a good briefing, don't keep it to yourself. Send it by email to a colleague in a related office or to a friend in another organization so they can build on it and adapt it to their needs.

1. Go to the Briefing Profile and then select **Export Briefing** in the Tools menu. This exports all the database entries for that briefing into a separate database file.
2. After saving this file, you can email it to others. Simply attach the briefing file and send it.
3. Anyone else who has ABS can then use the **Import Briefing** function to bring in into their ABS program. If the briefing links are to the Security Guide on your site, the recipient will have to change those links to the location of the Security Guide on their site. But a lot of time is still saved as compared with creating a new briefing from scratch.

Reports on Briefing Results

ABS automatically generates several types of reports. When a Briefing Profile is open, these reports are available under the Reports menu. One report provides a list of everyone who took that briefing and their quiz scores. This enables you to certify that a certain number of your personnel have done the required security awareness reading and passed the comprehension test. Another report provides summary information on all briefings that have been done showing how many passed, failed, or aborted, and a report for each individual that shows the results of all briefings taken by that person.

The reports information is stored in a Microsoft Access database, which cannot be edited or sorted by unit or office designation. To sort or otherwise manipulate the reports, export the data for each report into a .txt file and then import the file into a Microsoft Excel file. To do this, go to the Reports menu and select **Transfer to Excel**.

Note: When a briefing is presented on a client-server network, the reports are available on the program developer's desktop. When the briefing is presented in a web environment, however, the briefing results used to calculate the reports are transmitted back to the server. You need your webmaster's assistance to retrieve the reports from the server. Guidance on this is in the Help file and User Manual.

Question Statistics

Statistics are available to evaluate the effectiveness of each question. On the Tools menu, under Statistics, you will note that the default setting is **Do Not Calculate**. This is because question statistics are not always needed, and calculating statistics slows down the program response time. When you want to see the statistics, simply change the setting. Each question screen will then have a statistics tab with information on the number of right and wrong answers, degree of difficulty, and response time. An overall Question Statistics report is also available under the **Reports Menu**. There are multiple

statistical measures, and information about them is available in the Help file and User Manual.