



## MOAT Vault Management FAQ

### MOAT Overview

MOAT, which stands for Managed Ongoing Awareness Tools, is a new web based solution that Bentley is employing to deliver and track policies and training material. Certain policies and training will be required on an institutional level, while departments may also deliver policies or training material that is unique to that department. This FAQ explains how to manage documents in the MOAT vault, and how to retrieve information for your department.

### Uploading Documents to the Vault

To upload a document to the Vault, do as follows:

1. Login to MOAT at <https://edu.moatusers.com/>.
2. Click the Bentley University Vault on the left navigation.



3. Click the Tools button on the bottom navigation.



4. On the "User Tools" menu, click "Administrator Tools".

### User Tools

Bookmarks :

Change My Password :

My User Information :

View and Print My Certificate of Completion :

Administrator Tools :



5. Click "Maintain Vault".

Maintain Organizations

Maintain Users

Maintain Vault

Progress Reports

Policy Reports

User Feedback Reports

User Activity Reports

TOOLS

6. To add a new document, click the "New" button.

Bentley University Vault

Group by: None Sort by: Title

All		
Title	Description	Status
<a href="#">FERPA Policy</a>	Family Educational Rights and Privacy Act Policy	ACTIVE
<a href="#">GLB Policy</a>	Gramm-Leach-Bliley Policy	ACTIVE
<a href="#">Information Security Awareness</a>	Information Security Awareness Training for Staff	ACTIVE
<a href="#">PCI Policy</a>	Payment Card Industry Policy	ACTIVE
<a href="#">size test</a>	size test	DRAFT
<a href="#">test</a>	test	DRAFT
<a href="#">test</a>	test	DRAFT

NEW ADMIN

7. Enter the document Title, Description, and effective date. Change the status to Active if you are ready for others to view the item. Check "Printable" if you want people to print it, and "Required for cert" if it is an institution policy that is required. Select Required, Department and Type. Enter any additional text.

Policy List > Policy Editor

\* Title:

\* Description:

Status: Draft Effective Date: 6/22/2010

Printable?

Required for cert?

Required: None

Department: None

Type: None

Policy Text:



8. When done entering the above, click the Next button.



9. If you would like to add additional instructions for the document, enter it in the "Attachment Introduction Text".

Policy Title: Information Security Awareness  
Description: Information Security Awareness Training for Staff  
Status: ACTIVE

Attachment Introduction Text:

The following guide uses audio and may take a few seconds to load. Please turn on your speakers. To advance the pages, press the page down or arrow down button. When finished reviewing the session, please close the screen.

Attachments:



Order	File Name	Description
1	Security Awareness Trainingv11.pdf	



10. To upload your document (which must be a PDF), click the "Add" button. Microsoft Word and PowerPoint have the ability to save items as PDF documents by using the File, Save As feature.

11. Enter an Attachment Description if desired and click the Browse button. Attach the file and click "Save". Please not that files must be less than 10 MB.

Policy Title: Information Security Awareness  
Description: Information Security Awareness Training for Staff  
Status: ACTIVE

Attachment Description:

File to Attach:

12. After adding your document, click "Next".



13. If you would like to add questions to your document, click “Yes” and “Next”. If no questions, click “No” and “Next”.

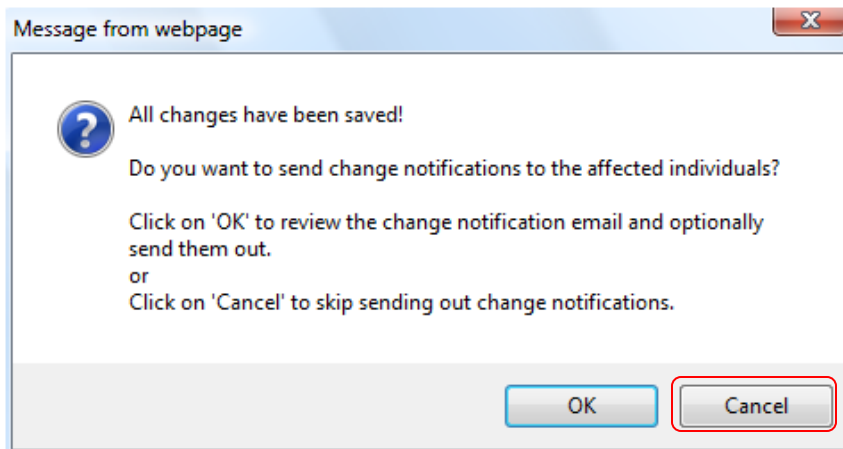
Would you like to create questions for this document?  Yes  No

14. At the access screen, select which departments should have access to your document. Click All Departments for all Bentley staff members or the appropriate department if the document pertains to only certain departments or types of users (i.e. Key Users or Senior Managers). Click “Next” when done.

**In order to check or uncheck the Departments listed below, you will need to check or uncheck "All Departments."**

Select	Department
<input checked="" type="checkbox"/>	All Departments

15. You will see the screen below notifying you that all changes were saved. If you want to send an e-mail to the departments selected in step 14, click Ok. If you do not want to send a notification, click Cancel and you are done.



16. If you want to send a notification on the new document or changed document, update the subject line, message and click “Send”.



### Editing Existing Vault Documents

To edit an existing Vault document, do as follows:

1. Login to MOAT at <https://edu.moatusers.com/>.
2. Click on MOAT tools at the bottom of the page.
3. Select Administrator Tools-> Maintain Vault.
4. Select the document you would like to edit. **Selecting the proper options is very important.**
  - a. For required policies, make sure the "Reset Signed Policy" box is **unchecked**. If it is not unchecked, it will reset the item for any users that have already agreed to the item.
  - b. If the document is required, make sure the required and annual boxes are checked.

\* Title:

\* Description:

Status:  Effective Date:

Reset Signed Policy:  (Signed Policy will change to Unsigned for all students)

Printable?

Required?  Annual?

- c. When you are finished with updates on the first screen, click the Next button.



- d. On the Policy Attachment List screen, click Save.

[Policy List](#) > [Policy Editor](#) > [Policy Attachment List](#)

Policy Title: test  
Description: test  
Status: ACTIVE

Attachment Introduction Text:

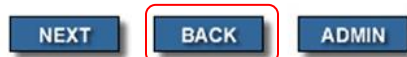
The following file(s) represent or augment the body of this policy.

Attachments:



- e. Unless you would like to send a communication about the change, click the Back button.

Would you like to create questions for this document?  Yes  No





## Viewing Reports

MOAT has several pre-canned reports that show the status of user compliance. To run a compliance report, do as follows:

1. Login to MOAT at <https://edu.moatusers.com/>.
2. Click the Bentley University Vault on the left navigation.



3. Click the Tools button on the bottom navigation.





4. On the "User Tools" menu, click "Administrator Tools".

## User Tools

**Bookmarks :**

**Change My Password :**

**My User Information :**

**View and Print My Certificate of Completion :**

**Administrator Tools :**

5. Click "Progress Reports".

**Maintain Organizations**

**Maintain Users**

**Maintain Vault**

**Progress Reports**

**Policy Reports**

**User Feedback Reports**

**User Activity Reports**

**TOOLS**

6. In the Available Reports window, click "Compliance" and click "Submit".

### Available Reports:

- Certified User Report
- All User Progress Report Lister
- No Progress Report
- User List
- Policy Status
- Compliance

**SUBMIT**

**TOOLS**

**ADMIN**



7. Select the type of report you want. Options are Approaching, Past Due or Approaching and Past Due Compliance and then click "Submit".

### Compliance Report Options

Organization: Bentley University  
Department: None  
Division: All Divisions  
Mgr./Sr. Mgr: All Mgr./Sr. Mgrs

Report on:

Compliance required within  days

**SUBMIT**

**BACK**

**ADMIN**

8. You will see a report on screen with the pertinent information. If desired, you can print or download the report by clicking the "Download this Report" or "Print this Report" links.

## Bentley University Compliance Report

Report Date: 6/22/2010 10:23:19 AM

Sort by:

[\[Download this Report\]](#)  
[\[Print this Report\]](#)

Reporting Users who are Past their Compliance Due Date or whose Compliance Due Date occurs within the next 30 days

User	Login ID	Department Division BentleyID Email	Supervisor Email
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