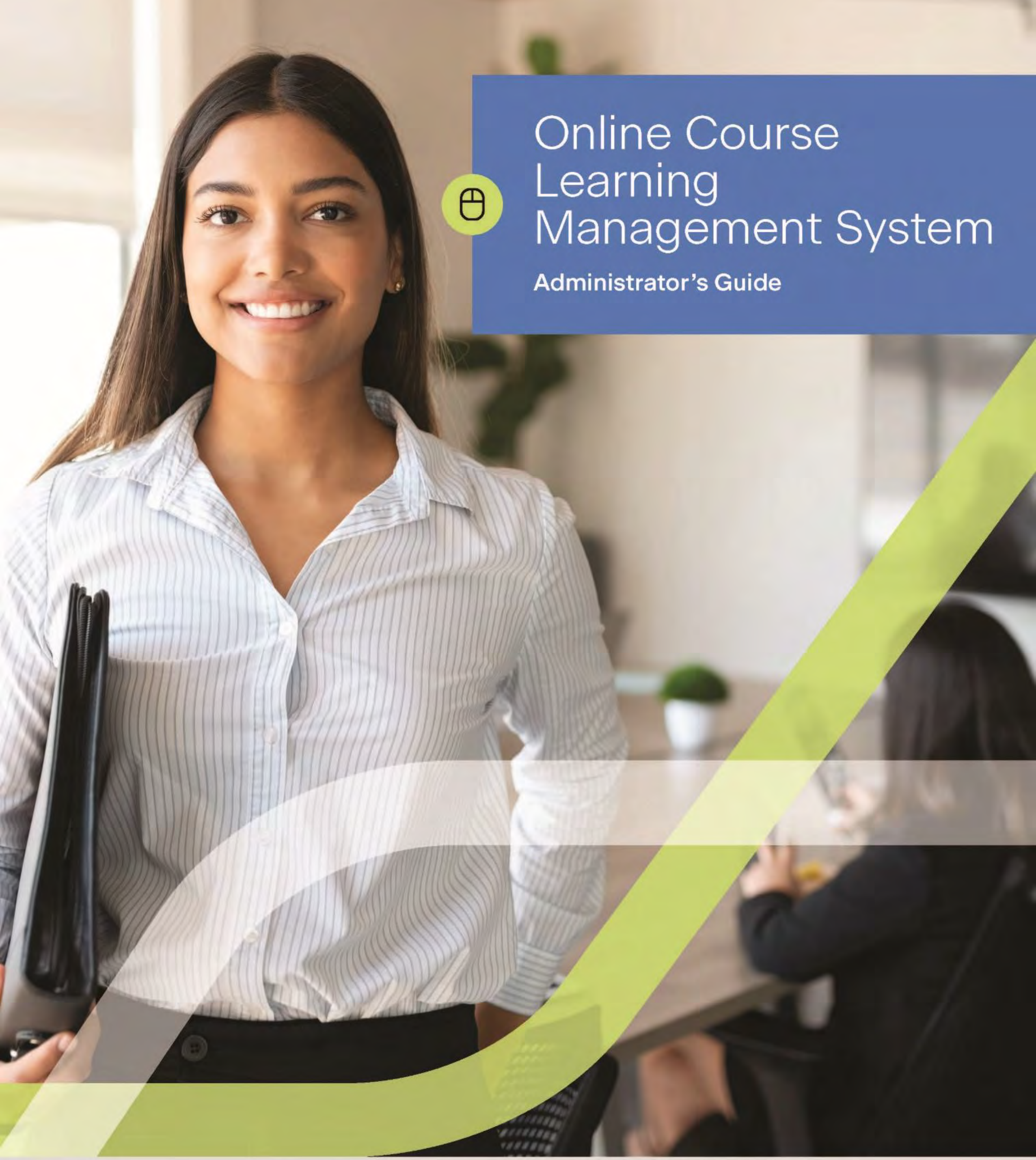

Online Course Learning Management System

Administrator's Guide

ICBA Education

July 2026

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TECHNICAL REQUIREMENTS

ICBA understands that IT security is of the utmost importance and that banks may need to restrict users from accessing various websites. As our courses are launched and tracked online, it is important that the following recommendations be reviewed and implemented in order to ensure a positive end user experience.

Network Requirements

For users on company networks, in order to ensure you can access and complete the online training, please configure the following:

1) Sites to Whitelist and disable any content caching from:

   *.icbalearning.org

   *.icba.org

   *.vubiz.com

   *.api.video

2) VPNs should not be used when accessing icbalearning.org. If the bank requires a learner to connect via VPN, ensure that the bank's VPN does not interfere with internet traffic in order for course tracking to complete.

Computer and Internet Connection

Item	PC	Mac
Hardware Specification	• Screen resolution: 1024 x 768 (or above); Internet connection: 5Mbps (megabits per second) or above for a single user as many of	• Screen resolution: 1020 x 768 (or above); Internet connection: 5Mbps (megabits per second) or above for a single user as many of

	our courses contain streaming video.	our courses contain streaming video.
Memory (when playing video)	• At least 4GB of RAM	• At least 4GB of RAM
Operating System	• Windows 7 or higher	• Mac OS X 10.9 or higher
Browser Version	• Google Chrome, version 44+ • Microsoft Edge, version 81+ • Mozilla Firefox, version 44+	• Google Chrome, version 44+ • Safari, version 15+
Cookies	• 3rd party cookies must be accepted	• 3rd party cookies must be accepted
JavaScript	• JavaScript must be enabled	• JavaScript must be enabled
Popup Blockers	• Turn off and disable all popup blockers	• Turn off and disable all popup blockers

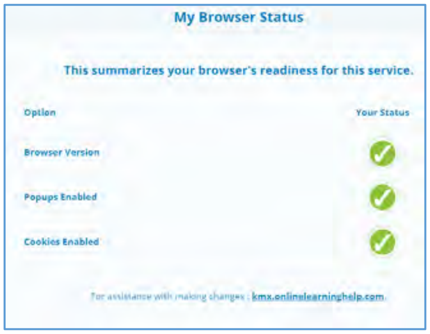
Many organizations have group policies and other security settings for Browsers that may hamper the ability for the courseware to load. While we may assist in identifying issues, we are unable to customize the courseware to work around internal IT policies.

Mobile testing recommendations

- Many course titles are available for mobile delivery via a browser. If you are planning for learners to access courses via a browser on a mobile device such as a tablet or smartphone, be sure to consider factors such as device screen size, device versions, operating system, mobile browser, etc., which will impact the learner's experience. It is highly recommended that you thoroughly test all courses using these devices to ensure compatibility and optimize the learner experience.
- Disable pop-up blockers

Browser Check Prior to Launching a Course

If an employee is having trouble launching a course, the first thing to check is whether their computer has everything required. Within the online training system is the Technical Assistance tab. Click on this tab.



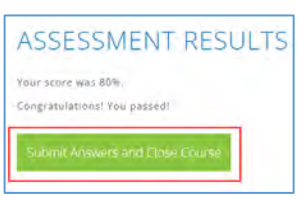
If you do not see all Green Checkmarks, system changes may be required on that particular computer. To learn how to make changes to the Browser settings, click on the link at the bottom of the screen (icba.onlinelearninghelp.com).

BEST PRACTICES & COURSE NAVIGATION

Courses Not Completing

If an employee tells you that they completed a course, passed the test and it is not moving from their Current Enrollments to their Completed Enrollments, ensure the following:

- Ensure they are using a proper browser version
- Have them check their Technical Assistance tab for any Red Xs (see Browser Check section above)
- Ensure this information: When they have passed the course exam and click "Submit Answers and Close Course", please wait for your screen to refresh before logging out of the system or closing your browser. This "refresh" time captures the fact that the course is complete, logs your score and moves the course from your Current Enrollments to your Completed Courses. Note: After you have completed a course, do NOT click the Exit button or the "X" to close your browser. Be sure to scroll down to the **bottom and click the "Submit Answers and Close Course"** green button that appears below their score after they have passed the test.



- If the course did not move to the Completed Courses tab on the day they completed the course, wait until the next day to see it moved.

- If all the steps above have been taken and the course is still in their Current Enrollments, contact ICBA Education (education@icba.org) with the following information for the employee having the course issue:
  - Name
  - Email Address
  - Exact Course Title
  - Date of Completion
  - Test Score

Assessment Questions and Answers

After the learner completes an assessment for a course, they may review the questions they answered. If the learner passed the course, they can click the option to "Show correct answer" for the questions they had wrong. If the learner did not pass, they can still see which questions they did not answer correctly, but they will not have the option to show the correct answer. IMPORTANT: Learners must make sure to click the "Submit Answer and Close Course" button at the bottom below their score.

Multi-Module Courses & Certificate Programs

Multi-Module courses and certificate programs will have the first course automatically launch when starting them for the first time. If the learner wants to see what other modules are in the course or see their progress/status in the program, they must click on the "hamburger/sandwich/menu" button in the upper left corner within the course. A list of the modules inside that program will appear along with the status of each.

Here is an example of a Certificate Program in which all courses in Area 1 are complete and the learner is now on the first course in Area 2.

Knowledge Base

There is a series of articles and videos available to help you navigate and use the Online Training Center. Click on the Technical Assistance tab and click on the link at the bottom of the screen (icba.onlinelearninghelp.com). Here you can find:

- An Online Training Best Practice Guide for employees. Please provide this to all employees.
- Short, searchable versions of what is found in this Administrators Guide
- Technical assistance for successful use of the Online Training Center

Additional Notes

- Throughout this Guide the Online Training System is referred to as "LMS" which stands for Learning Management System.

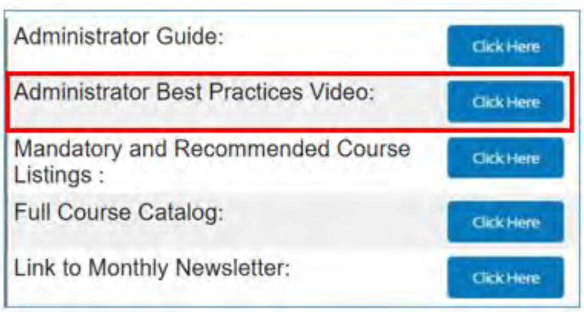
- Each ICBA member/nonmember bank and all individual employees of each bank (Roster/Employee/Organization Management) are created and maintained in the ICBA core system, not within the LMS. In order to access the LMS, individuals must have a profile (login/password) on the ICBA website. By establishing an ICBA profile, the individual users become part of the ICBA Organization and will receive various informational and marketing e-mails from ICBA. Individuals may elect to unsubscribe from some or all ICBA information or marketing e-mails and may do so by utilizing the "Unsubscribe" mechanism included at the bottom of these types of emails.

- Procedures for the Online Training Center begin on page 19 and are done within the LMS.

- ICBA recommends pulling a report from the LMS for all course enrollments and perform clean up prior to assigning courses for your next training period. We recommend an LMS Admin performs cleanup by deleting not completed enrollments for your employees before assigning the next training period courses. See section of this guide titled "All Employees & All Courses Report". Execute this report for a blank date range with the default of all courses checked. Export the results to Excel and filter the file to display records with a blank completion date. If you try to enroll the employee into the same course they are currently enrolled in, nothing happens as they are already enrolled in it, and the enrollment date will remain as the earlier date, not the newer date when attempting to enroll again. If you delete the older not completed course enrollment, you can then enroll them in that course with a newer enrollment date, making reporting easier for your next training period.

LMS ADMINISTRATOR BEST PRACTICES TUTORIAL VIDEO

A Best Practices video is available to provide comprehensive guidance on Roster Management and the LMS. You can access this resource from the blue "Administration" tab.

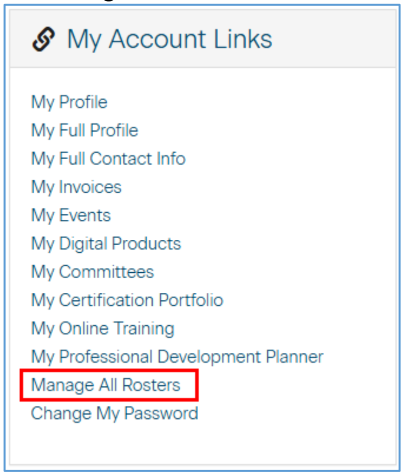


ROSTER/EMPLOYEE/ORGANIZATION MANAGEMENT

Prior to adding, editing, or deleting an individual it is always a best practice to look at your banks current Roster of Employees to determine if an individual already exists in the system at your bank, what location they are at and other details. To export your roster, follow these steps:

1. Go to www.icba.org.
2. Click on Login in the upper right corner.
3. Enter your e-mail and password for your ICBA Account.
4. Choose My Account from the dropdown arrow next to your Name in the upper right.
5. Click the Manage All Rosters link found in the My Account Links list of items on the right side of this page.
   You could also scroll down and click the blue Manage All Rosters button found in the Organizations You Manage section of the page. This button is towards the right side of

the screen and takes you to the same grid of all your employees as if you clicked the "Manage All Rosters" link in the My Account Links list.



6. In the upper right, click the Export Roster button 

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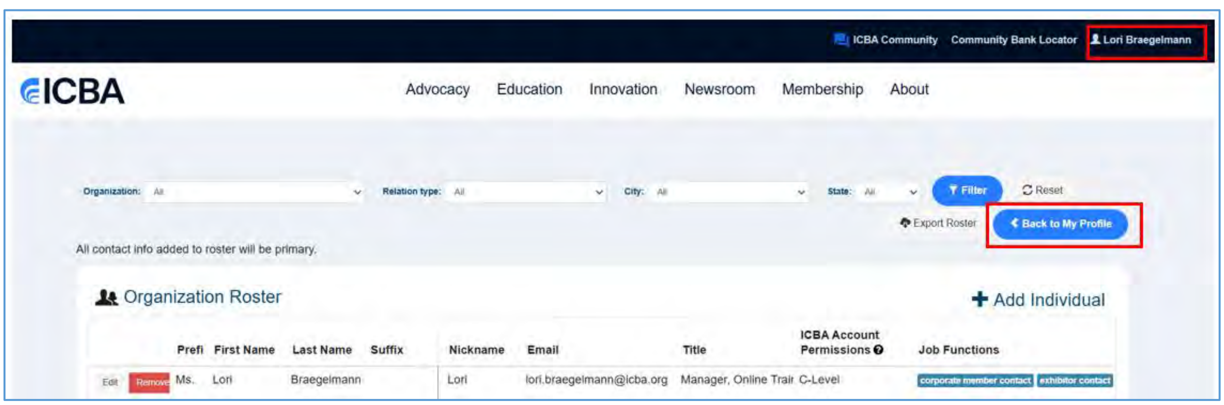
7. Your bank's roster will be exported to an Excel document. Use this document to determine who is missing, needs updates, or removed. Make the changes on the site, not the excel file.

If at any time you need to return to your "Organizations You Manage" or "My Profile" screen, click on the "Back to My Profile" button or your name in the upper right corner of the screen.

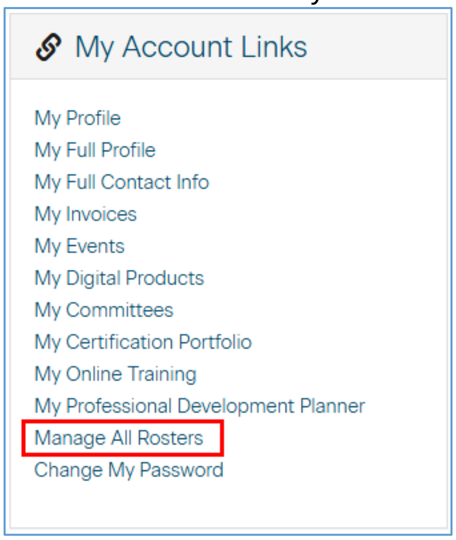


Adding a New Employee

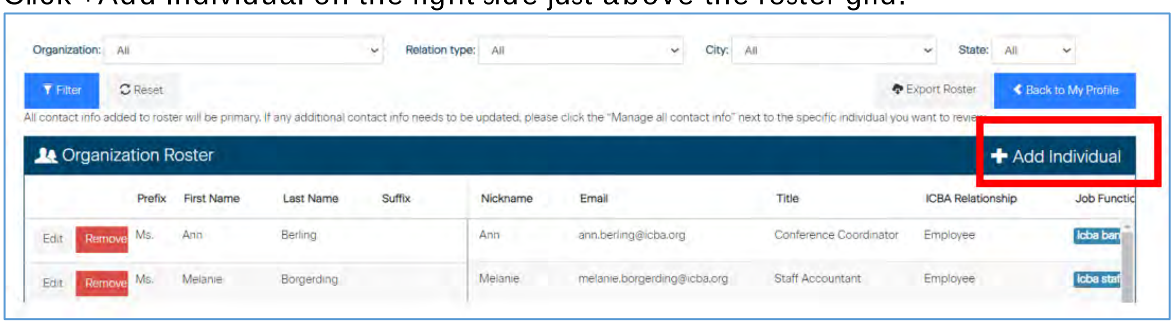
There are two ways in which a new employee can be added to the system. The LMS Administrator can add the new employee to the bank's roster, OR the employee may set up their own account (if they have a legitimate e-mail address), which will connect them to the bank. *The preferred method is the LMS Administrator creating the new accounts.*

LMS Administrator creating new account:

1. Go to www.icba.org.
2. Click on Login in the upper right corner.
3. Enter your e-mail and password for your ICBA Account.
4. Choose My Account from the dropdown arrow next to your Name in the upper right.
5. Click the Manage All Rosters link found in the My Account Links list of items on the right side of this page.
   You could also scroll down and click the blue Manage All Rosters button found in the Organizations You Manage section of the page. This button is towards the right side of the screen and takes you to the same grid of all your employees.

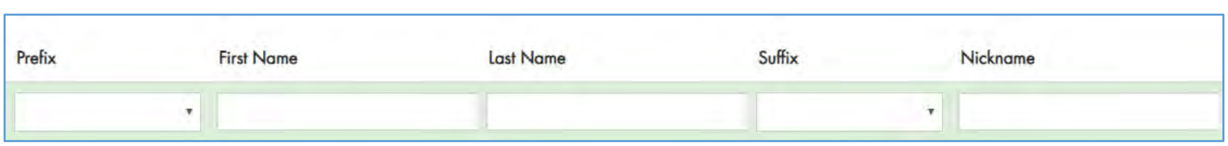


6. Click +Add Individual on the right side just above the roster grid.

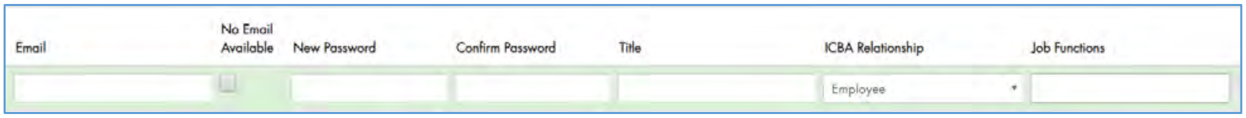


7. Complete each of the fields on the new blank line. You may use the tab button to move from field to field or use your mouse to click into each field. If using your mouse, you must scroll to the right to view the additional fields.

   Please enter data using mixed case (both upper and lowercase letters) and standard capitalization rules.



a. Prefix – Required field.
b. First Name – Required field.
c. Last Name – Required field.
d. Suffix – If applicable, not required.
e. Nickname – Required field.

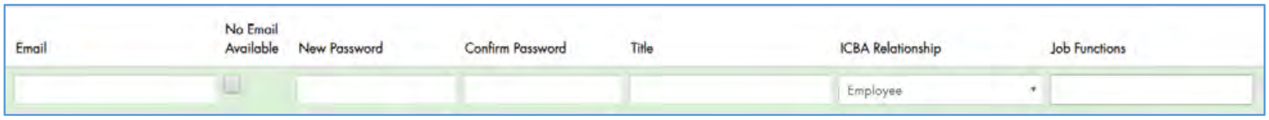


f. Email – An e-mail address is required for all new accounts as this is their "username" to access the system. If the employee has a legitimate e-mail, enter their e-mail address. *Note: duplicate e-mail addresses may not be used. Everyone must have their own unique e-mail address.* If the employee does not have a legitimate e-mail, leave the e-mail field blank and check the box "No Email Available". A fictitious e-mail address will be generated for them once their account is created (xxxxxx@commbanku.com).
g. New Password – You may choose to create a password for the new employee to get them started. It is not required. However, If the employee does not have a legitimate e-mail address you MUST create a password for them as they cannot *reset* their password on their own.
    i. If you *do not* create a password for the employee, they must follow the Password Reset instructions in the [Password Reset section](#) of this Guide.
    ii. If you *do* create a password for a new employee account, the employee will receive an e-mail from info@icba.org stating their password has been changed. We also suggest you have them change their password to something only they know once they've logged in. Provide the employee with the following instructions:
        - Go to www.icba.org.
        - Click on Member Login in the upper right corner.
        - Enter your e-mail and the password provided to you and click the Login button.
        - Click on My Account in the upper right corner.
        - Click on Change My Password found at the bottom of the list in the "My Account Links" box on the right side of the screen.
        - Enter your new password twice and click the Save button.
        - You will receive an e-mail from info@icba.org stating that your password has been changed (if you have a legitimate e-mail address).

    Employees who do not have a legitimate e-mail address, may change their e-mail address this same way after logging in. They just cannot reset their password on their own if they have forgotten it without having a valid email address to send communications to.

Passwords are case sensitive – there are no other requirements for length or character type.

h. Confirm Password – If you entered a password in the Password field, you must re-enter the same password in this field.

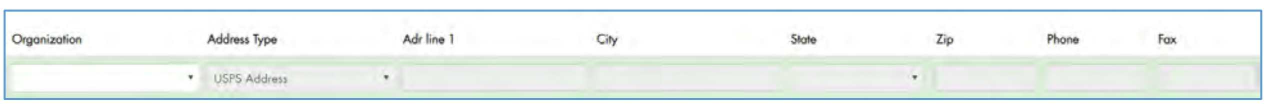


i. Title – Required field.

j. ICBA Relationship – Required field. This fields determines what the employee can do within the bank's online ICBA account. Choose one of the following from the dropdown:

   i. *Employee* – Can manage their own account and no others.
   ii. *Middle Manager* – Can manage individuals only at the location they are linked to.
   iii. *C-Level* – Can manage individuals at any branch or head office location as well as manage organization locations and demographics. LMS Administrators must be C-level.

k. Job Functions – This field is used to capture an employee's role within the bank. You may choose more than one job function by choosing them individually or holding the Control key on your keyboard while selecting from the dropdown. Note: If you need to add an employee as an LMS Administrator you must contact a ICBA Education Team member.



l. Organization – Select the location from the dropdown list that you want this new employee to be connected to. The address information will pre-fill once an Organization is selected.

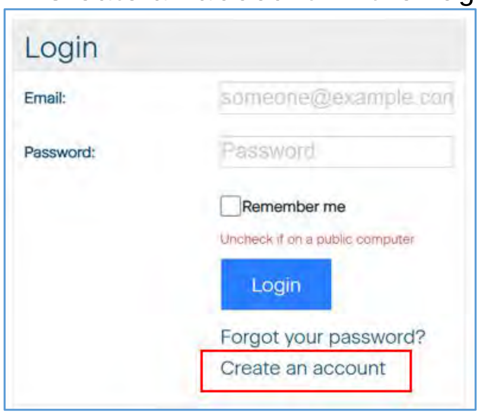
8. When all fields are complete, click the Save button on the left side of the screen.

9. If no duplicate or similar names are found in the system, the new employee is added and can be found in the roster alphabetically by last name. For those employees that do not have a legitimate e-mail address, you will need to find the new employee record in the roster grid and notate the system-generated e-mail address to supply to them to use for login purposes.

10. If a Duplicate Warning message appears on screen above the roster grid – please refer to the pages in this guide for [Duplicate Accounts](#).

Employee creating own account: (ICBA recommends the Administrator creates method)

1. Go to www.icba.org.
2. Click on "Login" in the upper right corner.
3. Click on "Create an account" in the Login box.



4. Enter your e-mail address in the box provided and click the "**Continue**" button.

5. An e-mail will be sent to the e-mail address entered in Step #4 with instructions to complete your account set up. There will be a link in the email you must click to complete this process.
   a. The email will come from info@icba.org. Please check your spam or quarantine to find the e-mail.
   b. The link in the email is valid for 24 hours from the time of receipt and can only be clicked one time.
   c. Also, ask your IT department to whitelist the following in order to receive e-mails:
      - IP addresses (205.201.42.27 and 205.201.40.208),
      - domain icba.org, and
      - main email address info@icba.org

      Whitelisting ICBA's email domain does not affect your bank's email security or deactivate your spam filter.

6. The link in the email will take you to our the "New Visitor Registration" page on our website to confirm the rest of your information. Enter in all the required information for your account.
   Organization Information Section

a. If you are not with any Organization, leave the Organization box blank and check the box for "No Organization affiliation" and continue with the rest of the information on the page.

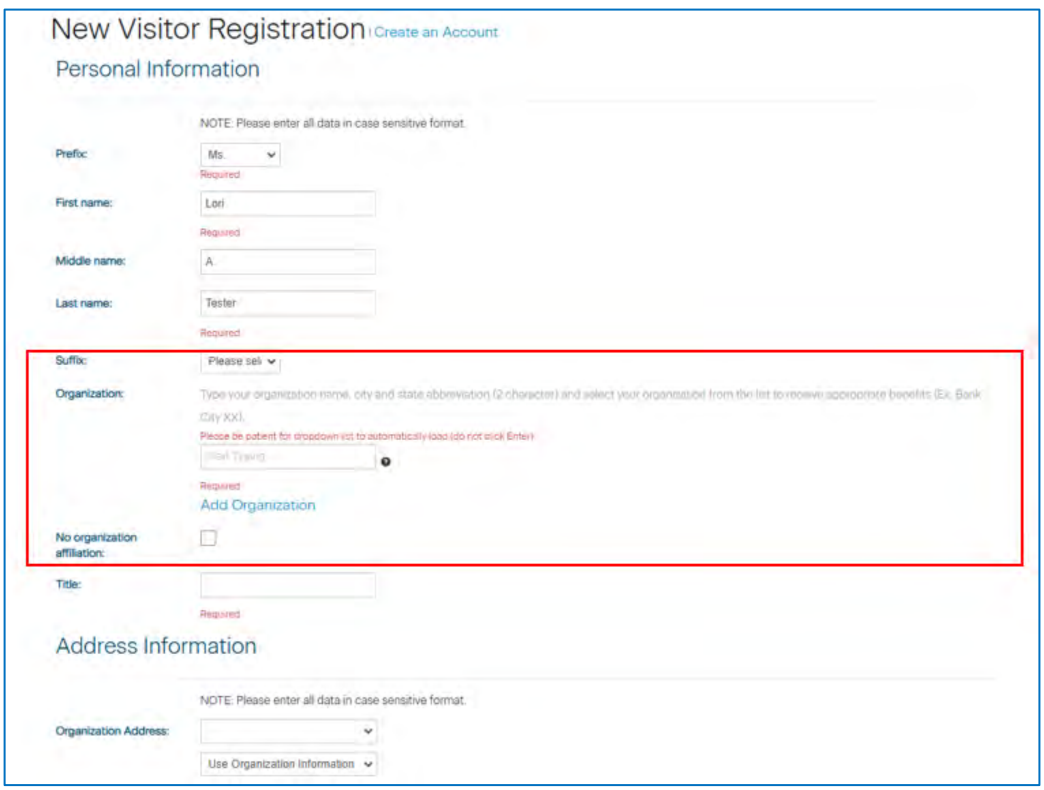
b. If you are with an Organization, type your Organization Name in the box. You may include City and State to help reduce the search results.
For Example: "ABC Bank Sauk Centre MN".

   i. Do NOT tab out of this field. Do NOT click enter. You must wait for the website to search our records for a possible Organization match. This could take a short amount of time.

   ii. Possible matching Organization records will appear in the picklist. Click on the correct Organization from the search results.

   iii. If there are no matches for the Organization, or if none of the search results are your organization, then click the "Add Organization" link to enter in your Organization Information which will create your Company in our system. After you complete the Organization Information it will return to your Account Information to finish creating your account.

   VERY Important: To receive appropriate access rights and ICBA benefits, make sure that you select an organization from the dropdown list of existing organizations. If you create a new organization, you will NOT be associated with your correct organization and their subscriptions.



7. Continue entering all the required fields on the New Visitor Registration Screen. We suggest using the Organization address information when possible unless you are a remote employee.
8. Set your new password value.
9. Confirm your password value.
10. Enter the CAPTCHA code value in the box at the bottom of the screen and click the "Continue" button.

11. Select your job function from the list and click the "Finish" button. You may select more than 1.

12. Your account is now complete and you will be directed to your My Profile page on our website.

NOTE: New accounts created by the LMS Administrator are pushed to the LMS within 10 minutes of their creation. Once this push occurs, you may log into the LMS and enroll them in courses.

Duplicate Account / Rehired Employee / Reused Email Address

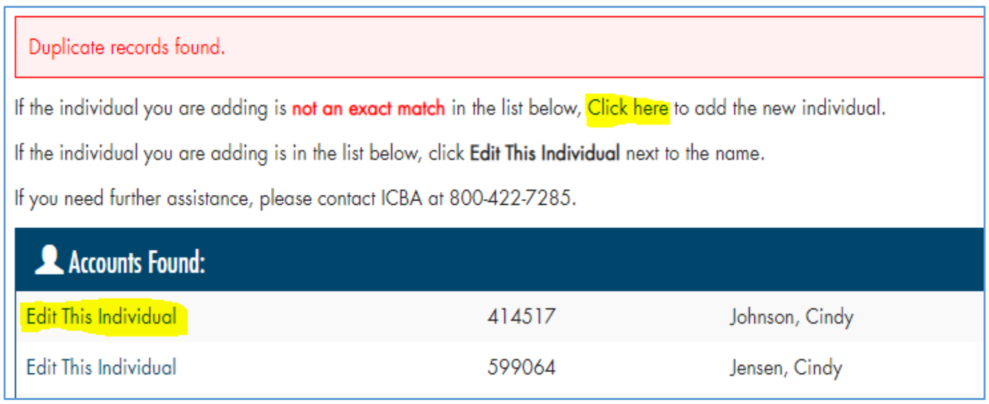
When you attempt to add an Individual to your bank's roster through the Manage All Rosters section of our website, our system will do some validation and return a message if it detects this as a possible duplicate account in our system. It will look for exact name matches, similar name matches and same email address values. Depending on the value and situation you could see a couple of different warning messages.

A Duplicate Account means this is the same person as an existing account in our system, this could be a situation of a rehired employee or a new hire who already has an account with ICBA from a previous employer.

This could also be a situation of a reused email address when the account existing with ICBA is not the same person as the account you are creating, but the email address you are trying to use on their new account is already in use with ICBA. There are different sets of instructions below depending on which scenario fits your instance.

Duplicate Account

If a potential duplicate account is found in the system that is similar to the account you are attempting to add, the following will appear on screen above the roster grid:

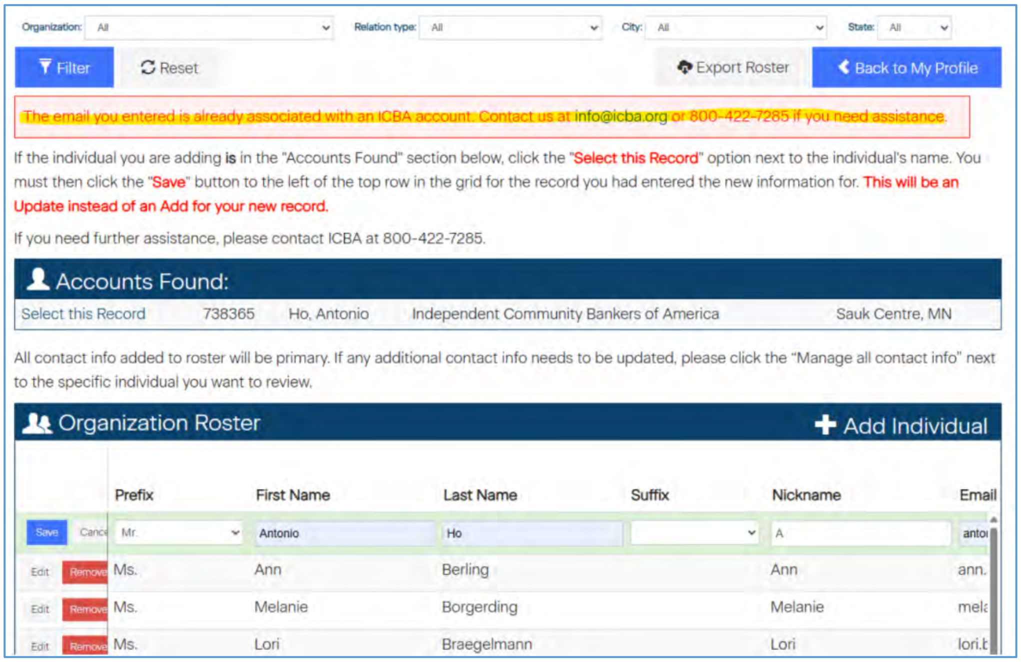


1. If a matching name appears in the "**Accounts Found**" box, you must determine if this is the same person you are attempting to add.
   - If an Individual of a potential match appears and is the same as your Individual but the person is at a different location, double check with the Individual first, then click "**Edit This Individual**" link by the matching record in the Accounts Found section of the warning. Then you must click the "**Save**" button to the left of the row for the record you are adding and it will update the existing record with the information you supplied vs creating a duplicate.
   - If there is an exact match and all information is correct, the new employee you are attempting to add, is already set up. Click the "**Cancel**" button to the left of the row for the new entry you started.

2. If there is not an exact account match in the "**Accounts Found**" box or you are uncertain if a potential match is an exact match, click on the "**Click here to add the individual anyway**" and they will be added to the system. Note: This may happen when an employee leaves the bank, they are removed from the bank roster, and then later that person returns to the bank to work. Even though they were removed from your bank's roster, they are NOT removed from the ICBA system. You will want to bring back their original Account to your roster by clicking the "**Edit This Individual**" option.

Reused Email – Email already exists on an Account with ICBA

If the account you are attempting to create contains an email address value that already exists on an account in the ICBA system, the following will appear on screen above the roster grid.



1. If you see the message of "The email you entered is already associated with an ICBA account" – you will not be able to create another account with this email address value.

2. Review the "Accounts Found" section. This will show the account in the ICBA System that has the email address value from the record you were attempting to create.
   a. If this is the same employee you were attempting to create the account for, follow these instructions.
      i. If an Individual of a potential match appears and is the same as your Individual but the person is at a different location or doesn't have a location as they were previously removed from your bank roster, double check with the Individual first, then click "Edit This Individual" link by the matching record in the Accounts Found section of the warning. Then you must click the "Save" button to the left of the row for the record you are adding and it will update the existing record with the information you supplied vs. creating a duplicate.
      ii. If there is an exact match and all information is correct, the new employee you are attempting to add, is already set up. Click the "Cancel" button to the left of the row for the new entry you started. Search the Manage All Rosters grid to locate this existing account to edit as needed.

b. If there is not an exact account match in the "Accounts Found" box, or you are uncertain if a potential match is an exact match, and the email address is NOT already in use with an ICBA Account, click on "**Click here to add the individual anyway**" and they will be added to the system.

c. If the record displayed in the "Accounts Found" section is NOT the same employee, this would be a situation of a reused email address at your organization.
    i. You must contact ICBA Education. You will not be allowed to create a new account with an email that has already been used in our system. ICBA Staff will complete work in the system to free up the email so it can be re-used on your new hire and not display any of the information from your prior employee with that same email address value. Contact ICBA Education at 800-422-7285 or email at education@icba.org.

Removing an Employee

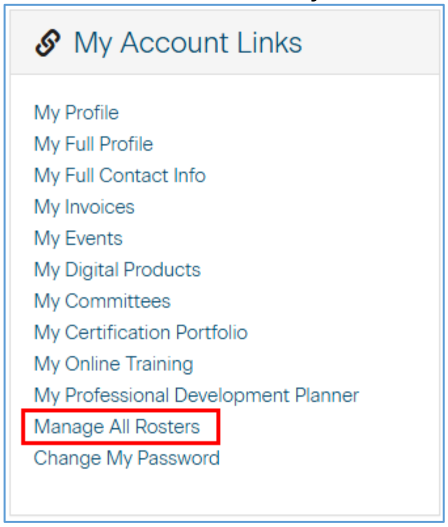
There are three important things **to note prior to removing an employee from your bank's** roster.

1. Please do not remove employees unless they are no longer with the organization, as they may be enrolled in other important ICBA programs.
2. If an employee changes bank locations/branch, do not remove the employee, but edit their profile. See Editing an Employees Account instructions on the next page.
3. Before removing an employee from the bank's roster, you must pull an Activity Report from the LMS because removing an employee from your bank's roster also removes them *and their history* from the LMS.

After following the important steps above, proceed with the following procedures to remove an employee:

1. Go to www.icba.org.
2. Click on Login in the upper right corner.
3. Enter your e-mail and password for your ICBA Account.
4. Choose My Account from the dropdown arrow next to your Name in the upper right.
5. Click the Manage All Rosters link found in the My Account Links list of items on the right side of this page.
   You could also scroll down and click the blue Manage All Rosters button found in the Organizations You Manage section of the page. This button is towards the right side of

the screen and takes you to the same grid of all your employees.



6. From this screen you can filter and sort the report in several ways to find the employee you want to remove or simply click through each page until you find the individual (listed in last name alphabetical order). You can choose from any of the dropdowns at the top of the screen and click the Filter button or you can click on any of the column headers within the Organization Roster to sort on that column.

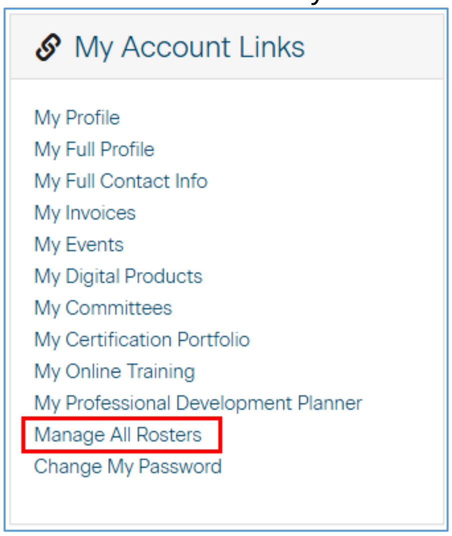
7. When you find the employee, click the Remove button. This does NOT delete their account in our system. Their account remains, but is no longer affiliated with your organization.
8. A confirmation box will appear to ensure you want to remove this employee. Click Yes, remove employee or No.

NOTE: The Removal of an employee does not occur immediately within the LMS. The employee will be removed during the LMS weekly update process that occurs each Friday night.

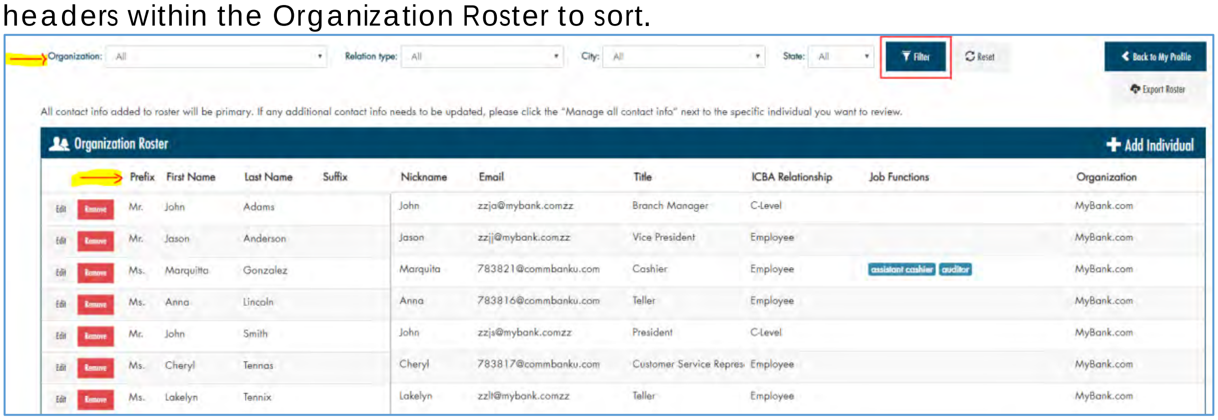
Editing an Employee's Account

1. Go to www.icba.org.

2. Click on Login in the upper right corner.
3. Enter your e-mail and password for your ICBA Account.
4. Choose My Account from the dropdown arrow next to your Name in the upper right.
5. Click the Manage All Rosters link found in the My Account Links list of items on the right side of this page.
   You could also scroll down and click the blue Manage All Rosters button found in the Organizations You Manage section of the page, this button is towards the right side of the screen and takes you to the same grid of all your employees.



6. From this screen you can filter and sort the report in several ways to find the employee you want to edit or simply click through each page until you find the individual (listed in last name alphabetical order). You can choose from any of the dropdowns at the top of the screen and click the Filter button or you can click on any of the column headers within the Organization Roster to sort.



		Prefix	First Name	Last Name	Suffix	Nickname	Email	Title	ICBA Relationship	Job Functions	Organization
Edit	Remove	Mr.	John	Adams		John	zzja@mybank.comzz	Branch Manager	C-Level		MyBank.com
Edit	Remove	Mr.	Jason	Anderson		Jason	zzjj@mybank.comzz	Vice President	Employee		MyBank.com
Edit	Remove	Ms.	Marquitta	Gonzalez		Marquita	783821@commbanku.com	Cashier	Employee	assistant cashier, auditor	MyBank.com
Edit	Remove	Ms.	Anna	Lincoln		Anna	783816@commbanku.com	Teller	Employee		MyBank.com
Edit	Remove	Mr.	John	Smith		John	zzjs@mybank.comzz	President	C-Level		MyBank.com
Edit	Remove	Ms.	Cheryl	Tennas		Cheryl	783817@commbanku.com	Customer Service Repres	Employee		MyBank.com
Edit	Remove	Ms.	Lakelyn	Tennix		Lakelyn	zzlt@mybank.comzz	Teller	Employee		MyBank.com

7. Once you find your employee you will take one of two options depending on what you want to edit.
   a. Click the Edit button on the left if you want to edit the individuals:
      i. Name

ICBA Education

ii. E-mail Address
iii. Organization/Location
iv. Title
v. ICBA Relationship
vi. Job Function

8. Edit all applicable fields.
9. Once all changes are complete, click the Save or Close button.

Adding an LMS Administrator

If the bank needs to add or remove LMS administrator permissions from an employee's ICBA account, you will need to contact an ICBA Education Team Member. Simply email education@icba.org or call 800-422-7285. If requesting ICBA staff to remove the LMS Administrator permissions, please be sure to tell the ICBA Education Team Member if this employee is no longer with your organization, or if they are, specify if their "C-level" status should also be changed to "Employee" as they should no longer be maintaining the banks' Roster.

Email Domain Changes

If your organization has changed email address domains, reach out to ICBA Dducation to request a bulk email update for your employees. We can update all your employees' email addresses in our system at the same time to save you from updating each account individually.

Send your request to education@icba.org

Password Resets

There are 3 ways in which an employee's password may be reset if they have forgotten it.

Employee Resets Their Own Password

An employee may reset their own password to the system if they have a legitimate e-mail address. If the employee has a xxxxxx@commbanku.com they cannot use this option. Have the employee follow these instructions:

1. Go to www.icba.org.
2. Click on Login in the upper right.
3. Click on the Forgot your password? link.
4. Enter your e-mail address and click Submit.
5. An e-mail will be sent with instructions to reset the password. *Note: The link is valid for 24 hours from the time of receipt and can only be clicked on once.*

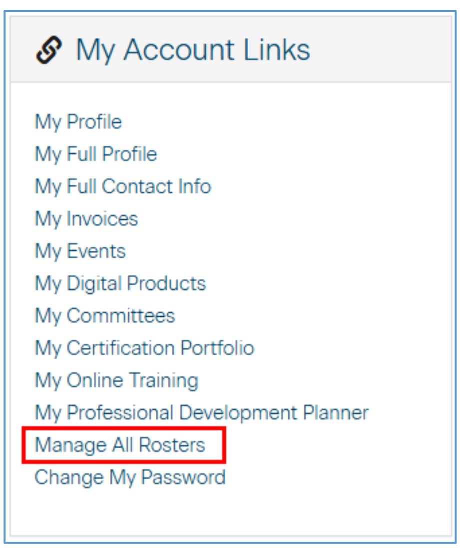
The e-mail will come from info@icba.org. Please check your spam or quarantine to find the e-mail. Also, ask your IT department to whitelist the information below in order to receive e-mails. Whitelisting ICBA's email domain does not affect your bank's email security or deactivate your spam filter.

- IP addresses (205.201.42.27 and 205.201.40.208),
- domain icba.org, and
- main email address info@icba.org

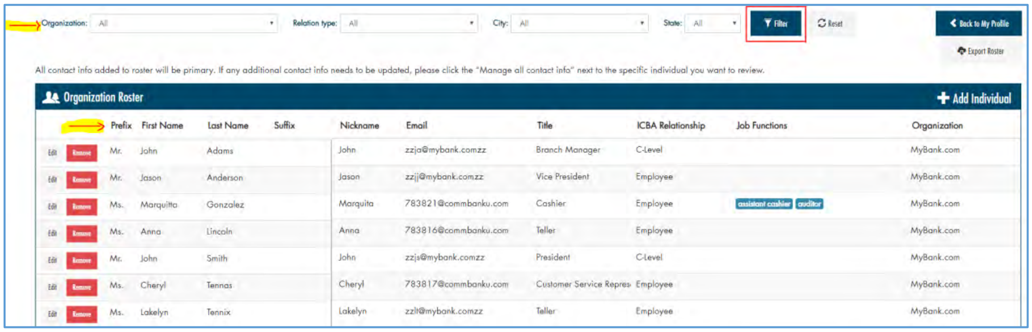
LMS Administrator Resets Employees Password

An LMS Administrator (employee at your organization) can reset an employee's password within the ICBA website. Follow these instructions:

1. Go to www.icba.org.
2. Click on Login in the upper right.
3. Enter your e-mail and password for your ICBA account.
4. Choose My Account from the dropdown arrow next to your Name in the upper right.
5. Click the Manage All Rosters link found in the My Account Links list of items on the right side of this page. You could also scroll down and click the blue Manage All Rosters button found in the Organizations You Manage section of the page, this button is towards the right side of the screen and takes you to the same grid of all your employees.



6. From this screen you can filter and sort the report in several ways to find the employee you want to reset or simply click through each page until you find the individual (listed in last name alphabetical order). You can choose from any of the dropdowns at the top of the screen and click the Filter button or you can click on any of the column headers within the Organization Roster to sort.



7. Once you find the employee, click the Edit button on the left side of the screen next to the individual.
8. Tab or scroll and click in the "New Password" field.
9. Enter in a new password and enter it again in the "Confirm Password" field.
10. Click the Save button on the left side.
11. The employee will receive an e-mail from info@icba.org stating that their password has been changed.

The employee will not be prompted to change their password upon login once you have reset it. We recommend you have them change their password to something only they know once they have logged in. Provide the employee with the following instructions:

- Go to www.icba.org.
- Click on Login in the upper right corner.
- Enter your e-mail and the password provided to you and click the Login button.
- Choose My Account from the dropdown arrow next to your Name in the upper right.
- Click on Change My Password found at the bottom of the list in the "My Account Links" box on the right side of the screen.
- Enter your new password twice and click the Save button.
- You will receive an e-mail from info@icba.org stating that your password has been changed (if you have a legitimate e-mail address).

Employees who do not have a legitimate e-mail address, may change their e-mail address this same way, after logging in. They just cannot reset their password on their own if they have forgotten it.

ICBA Education Team Member Resets Password

You can contact an ICBA Education team member at education@icba.org or call 1-800-422-7285 to have the password reset.

If an ICBA Education team member resets a user's password, they will receive an e-mail that their password has been reset (if a legitimate e-mail is on file).

Managing Your Organization

The following instructions are to be followed if you have a C-Level relationship type and need to add a NEW branch to your organization or edit the head office or branch locations information.

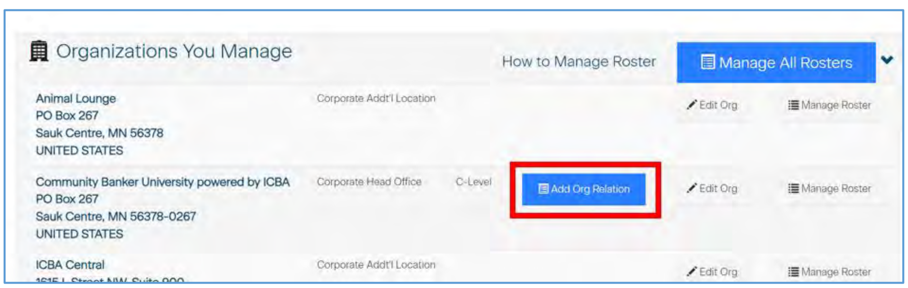
NOTE: Relocating a head office and/or adding a new organization due to a merger or acquisition situation can be tricky. If the new location is part of a merger or acquisition, always reach out to ICBA to assist with this setup.

If you have any questions regarding creating a new Organization or adding a Relationship, please contact info@icba.org or 1-800-422-7285 for assistance.

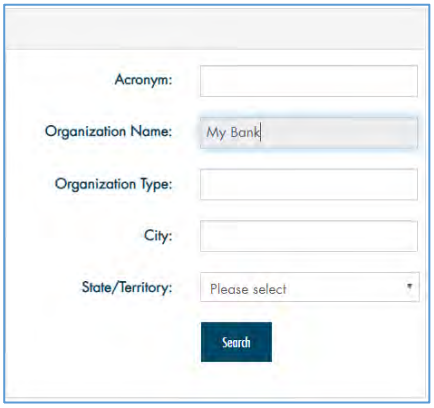
Adding a New Branch

Caution - We do recommend you reach out to ICBA for Organization changes, such as adding additional branch locations as this is a detailed and intricate process.

1. Go to www.icba.org.
2. Click on Login in the upper right.
3. Choose My Account from the dropdown arrow next to your Name in the upper right.
4. Scroll down to the Organizations You Manage box and click on the Add Org Relation button found next to the Bank Head Office.



5. Enter in, at a minimum, the Organization Name, on the Search screen for the system to search to find potential duplicate organizations. The more information you enter the smaller the search results, less is more.



a. If no organizations are found, click "**Add an Organization**"

b. If a similar organization is found and it is a location that you want to hook to your bank, click the "**+Add a Relationship**" button.

6. Complete all fields with information on the new branch on the "Add Organization Relation" screen and click the Continue button.
7. The new Branch will now appear in the list of Organizations You Manage. You may add employees to this branch as necessary.

NOTE: Adding a new organization in a merger situation can be tricky due to the timing of the merger and the changing of the organization name. If you have any questions regarding creating a new Organization or adding a Relationship, please contact an ICBA Education team member for assistance.

Editing an Organization

1. Go to www.icba.org.
2. Click on Login in the upper right.
3. Choose My Account from the dropdown arrow next to your Name in the upper right.
4. Scroll down to the Organizations You Manage and click the Edit Org button next to the specific branch or head office.
5. Click the Edit Organization button in the "Details" box.

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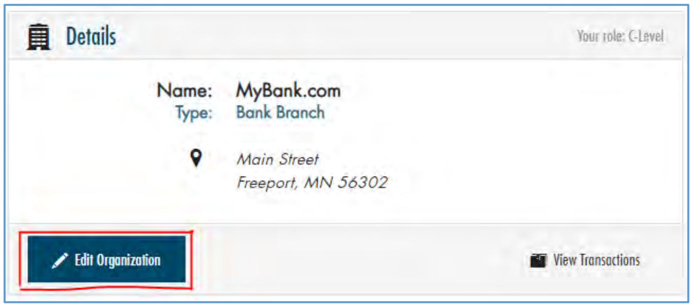
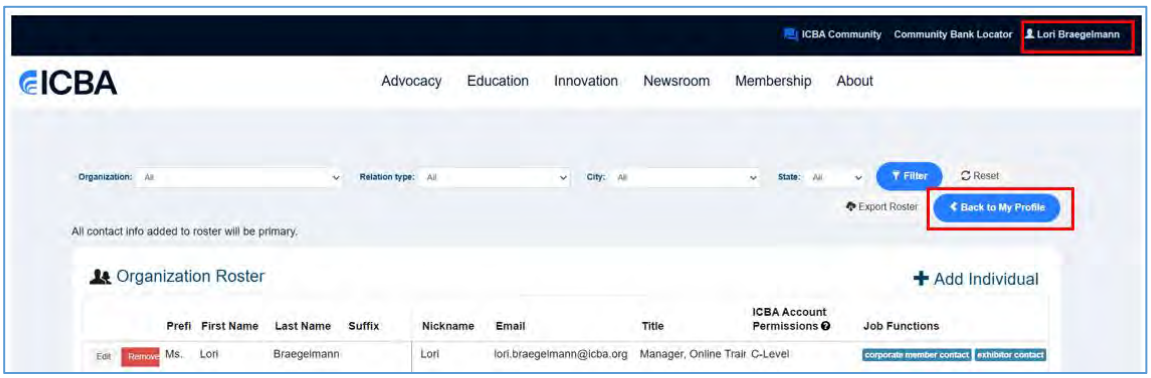


6. Edit the necessary fields and click the Save button at the bottom.

7. To return to your "Organizations You Manage" or "My Profile" screen, click on the "Back to My Profile" button or on your name in the upper right corner of the screen.



Note: To Remove a branch please contact ICBA at info@icba.org or 1-800-422-7285.

The instructions in the remainder of this Guide require the user to have LMS Administrator permissions. If you do not see the Administration Tab once you are logged into the Online Courses Learning Management Center, you do not have the necessary Admin rights. Please contact an ICBA Education Team member if you do not see this Administration tab and should.

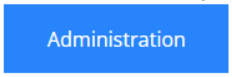
COURSE ENROLLMENTS

There are four ways to enroll employees into courses. **ICBA's recommended option to use is the "Assign Specific Employees to Specific Courses (most common)".** This option has the flexibility to do the features of all the other methods.

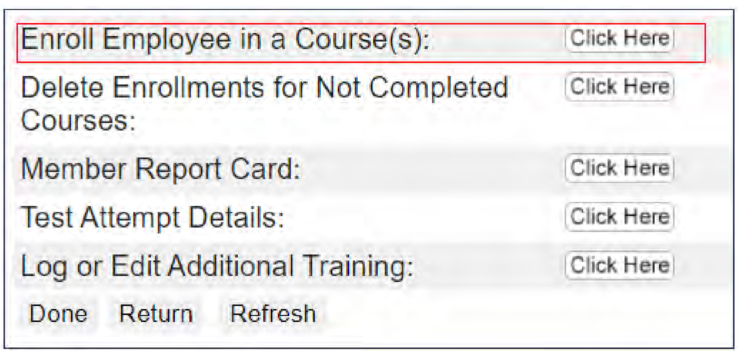
1. Enrollment for Single Employee
2. Assign All Employees to a Course
3. Assign Specific Employees to One Course
4. Assign Specific Employees to Specific Courses(most common)

Single Employee

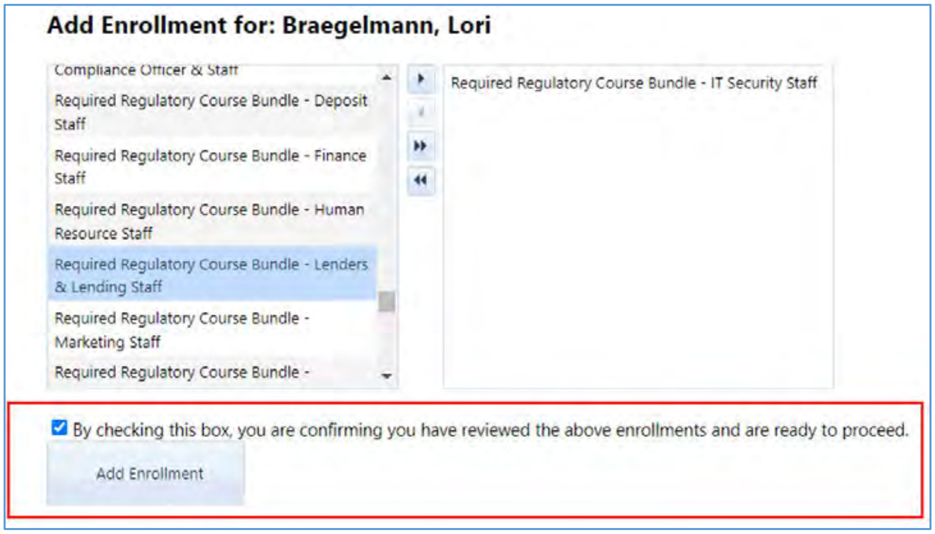
To manage enrollments for a single employee, follow these instructions:

1. From the LMS (www.icbalearning.org) - Click on the Administration tab


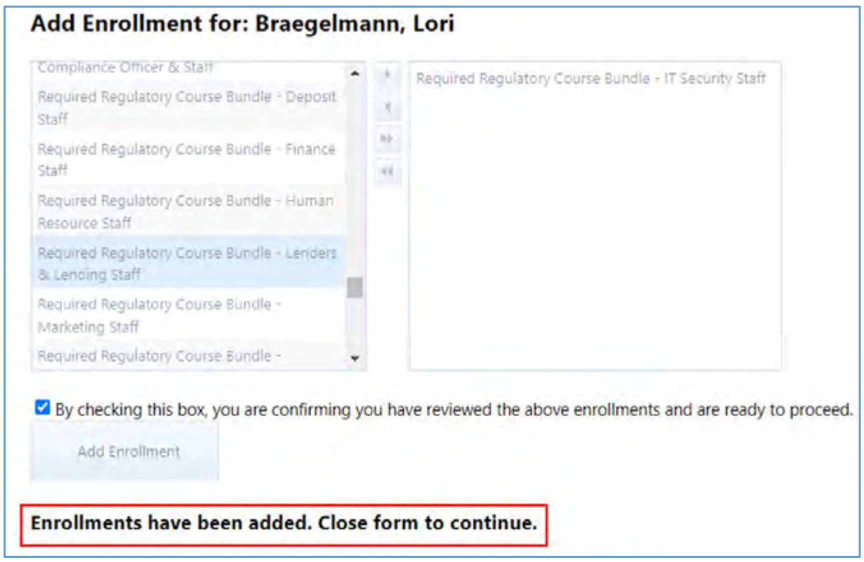
2. Select the employee's name from the Select Employee dropdown menu under the Administer Members section of this page.


3. "Click Here" next to Enroll Employee in a Course(s).


4. Double click the desired course OR click and highlight the desired course and click the single arrow to move the course from the available courses window on the left to the enrollment list window on the right. Do this for each course you would like to enroll the employee in.
5. When you are finished adding the course(s), Check the box for "By checking this box, you are confirming you have reviewed the above enrollments and are ready to proceed.
6. Then click the Add Enrollment button.



7. When the enrollment is successful you will see the message outlined below appear at the bottom of the page. Click the Administration tab to return to the main screen.



*Important Note – no email is sent to the employee the course enrollment was completed for.

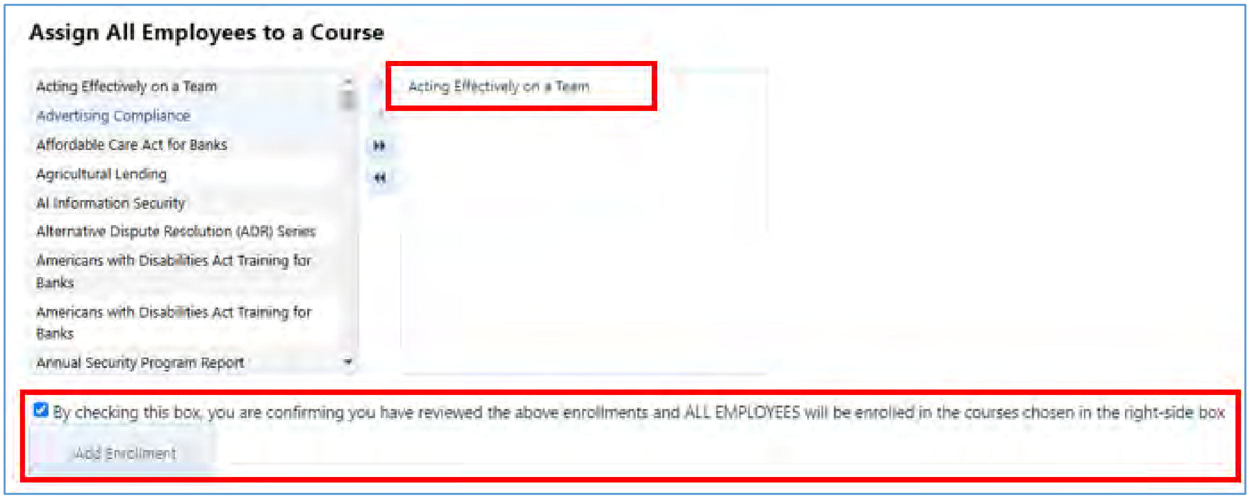
Assign ALL Employees to a Course

Use caution with this option. Be very careful as this will assign the course to ALL your employees.

To enroll ALL employees in a specific course(s), follow these instructions:

1. From the LMS (www.icbalearning.org) - Click on the Administration tab
2. "Click Here" next to Assign ALL Employees to a Course under the Assign Employees in Courses section.

3. Double click the desired course OR click and highlight the desired course and click the single arrow to move the course from the available courses window on the left to the enrollment list window on the right. Do this for each course you would like to enroll ALL employees in.
4. When you are finished adding the course(s), check the box for "By checking this box, you are confirming you have reviewed the above enrollments and are ready to proceed.
5. Click the Add Enrollment button. Proceed with caution on using this option as it enrolls everyone from your organization in the course(s) selected.
6. Click the Administration tab to return to the main screen.

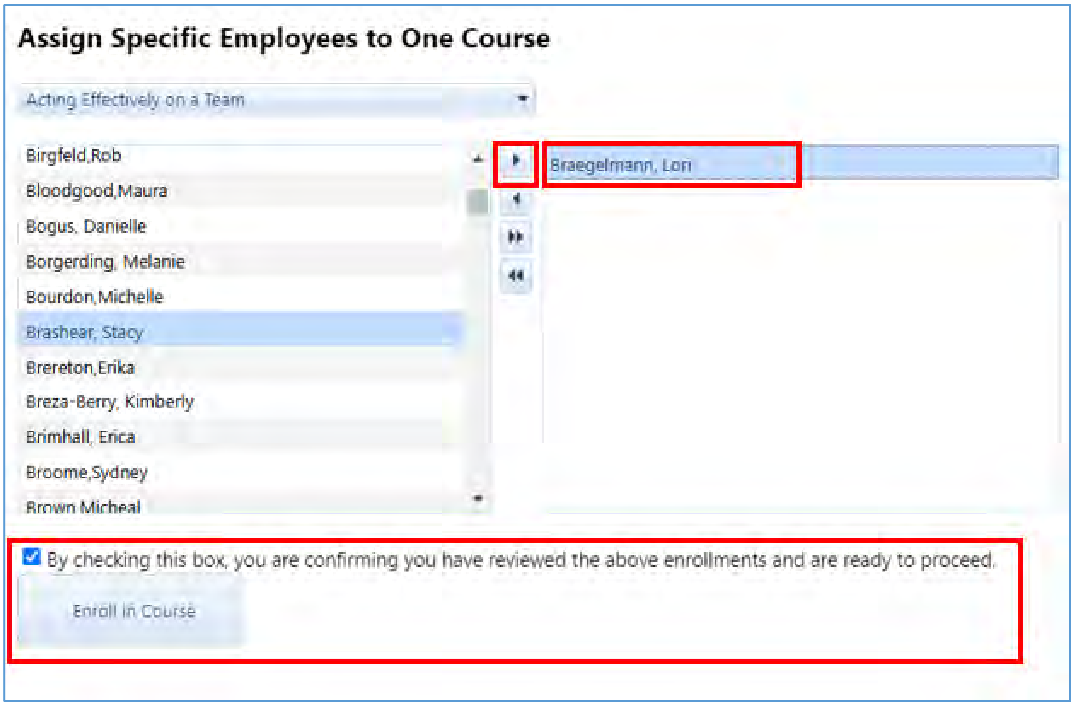


*Important Note – no email is sent to the employees the course enrollment was completed for.

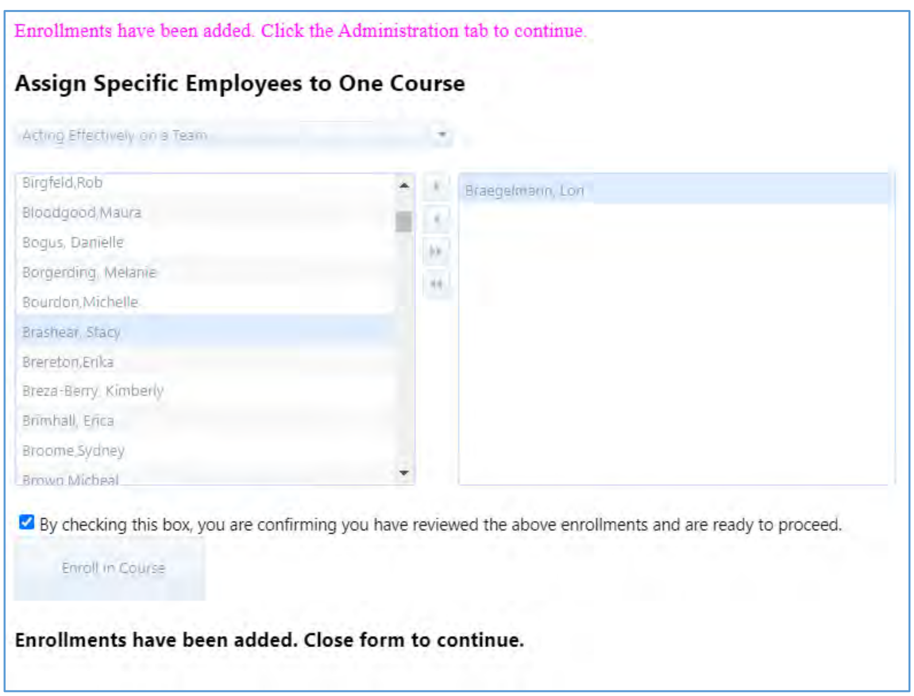
Assign Specific Employees to One Course

If you want to enroll multiple employees in a single course, follow these instructions:

1. From the LMS (www.icbalearning.org) - Click on the Administration tab
2. "Click Here" next to Assign Specific Employees to One Course under the Assign Employees in Courses section.
3. Select the course title using the Select Course drop down.
4. Double click the desired employees OR click and highlight the desired employees and click the single arrow to move the employee from the available employee's window on the left to the enrollment list window on the right. Do this for each employee you would like to enroll in the specific course.
5. When you are finished adding the employees, check the box for "By Checking this box, you are confirming you have reviewed the above enrollments and are ready to proceed.
6. Click the Enroll in Course button.
7. Click the Administration tab to return to the main screen.



8. When the enrollment is successful you will see the message below. Click the Administration tab to return to the main screen.



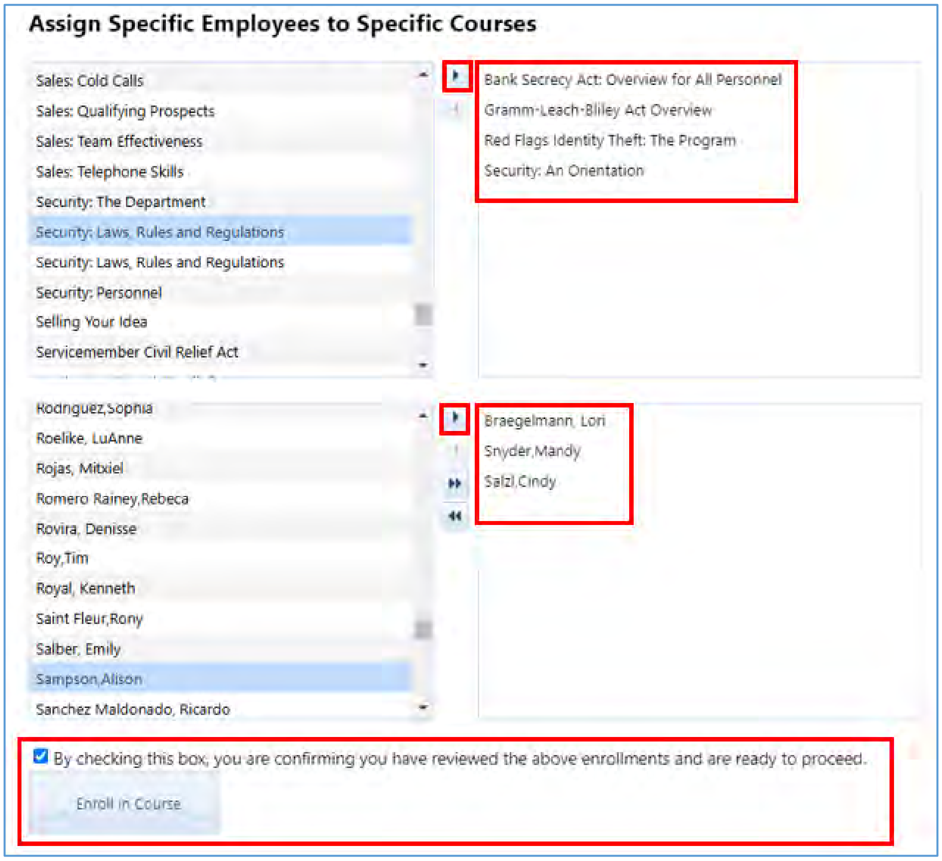
*Important Note – no email is sent to the employee the course enrollment was completed for.

Assign Specific Employees to Specific Courses (most common)

This is the recommended method for enrolling your employees into ICBA courses. You can pick 1-to-many employees and 1-to-many courses. Often this option is used to assign groups of employees in similar job roles to several courses at the same time.

To enroll multiple employees in the same multiple courses, follow these instructions:

1. From the LMS (www.icbalearning.org) - Click on the Administration tab
2. "Click Here" next to Assign Specific Employees to Specific Courses (most common) under the Assign Employees in Courses section.
3. Double click the desired course OR click and highlight the desired course and click the single arrow to move the course from the available courses window on the left to the enrollment list window on the right. Do this for each course you would like to enroll the employees in.
4. Double click the desired employees OR click and highlight the desired employees and click the single arrow to move the employee from the available employee's window on the left to the enrollment list window on the right. Do this for each employee you would like to enroll in the specific courses.
5. Review that you have all courses and all employees you desire into the boxes on the right side.
6. Check the box for "By Checking this box, you are confirming you have reviewed the above enrollments and are ready to proceed."
7. Click the Enroll in Course button.
8. Click the Administration tab to return to the main screen.



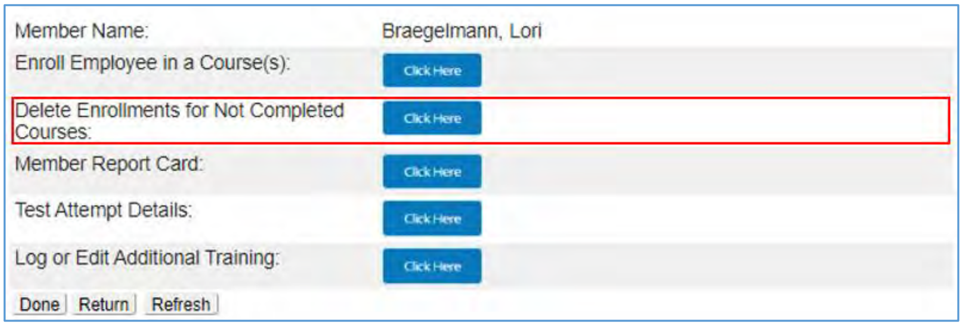
*Important Note – no email is sent to the employee the course enrollment was completed for.

Delete Enrollment

If you wish to delete an enrollment(s) for an individual for a course(s) they have not yet completed, follow these instructions below. Note: you will never delete a completed course from an employee's record history.

1. Click on the Administration tab
2. Select the employee's name from the Select Employee dropdown menu under the Administer Members section.

3. "Click Here" next to Delete Enrollments for Not Completed Courses.



4. On the next screen, you will see a list of the courses the employee is currently enrolled in on the left side of the page. To delete a course, double click the desired course or click and highlight and click the single arrow to move the course from the enrolled courses window on the left to the window on the right. Do this for all of the course enrollments you would like to delete.
5. When you are finished, click the Delete Enrollment button.
6. When the course deletion is successful you will see the message "Enrollments deleted". Close form to Continue."
7. Click the Administration tab to return to the main screen.

Automated Course Enrollment Reminder Emails

The Learning Management System (LMS) automatically sends course enrollment reminder emails at 30, 60 and 90 days following the enrollment date. These reminder emails are sent from OnlineTrainingReminder@icba.org.

If you would like to disable these automatic reminder emails, please contact education@icba.org for assistance.

REPORTING for Standard Plan/Bundles/Bank-Wide Certificate subscribers

Passing Result for all Courses is 80%

There are three ways to access reports based on employee's activity or course activity.

1. Single Employee Report
2. All courses for all employees (excluding Bank Director Training Courses (BDOT))
3. All employees for specific courses (excluding Bank Director Training Courses (BDOT))

Single Employee Report

To access the “report card” (completed and not completed courses) for an individual employee follow these instructions:

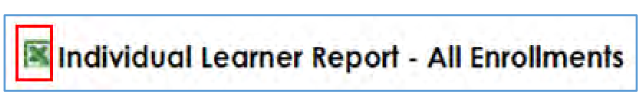
1. Click on the Administration tab
2. Select the employee’s name from the Select Employee dropdown menu under the Administer Members section.

3. “Click Here” next to the Member Report Card.

4. Enter the Enrollment Start Date and End Date *(YYYY-MM-DD)* of the dates in which the employee was enrolled in their courses that you want a report provided for. REMEMBER, these dates are the dates the administrator or employee enrolled in the courses, not necessarily the dates in which the employee was to take and complete the courses.

   Note: You may leave the dates blank to produce an entire history report for this employee.

5. There is a maximum number of line items (200) that appear directly on the screen. To see the full report, you must export to Excel. Click on the Excel icon at the top left of the on-screen results. You can also print the report from Excel.

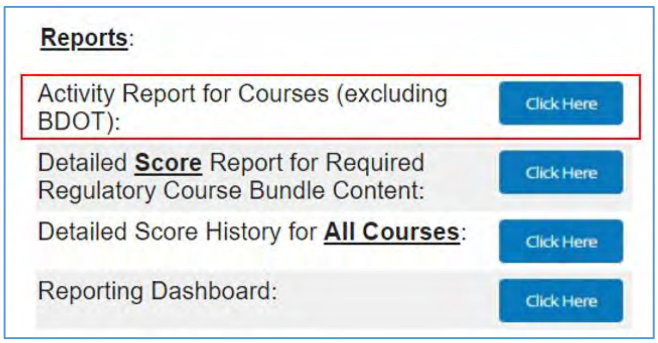


6. Click the Administration tab to return to the main screen.

All Employees & All Courses Report

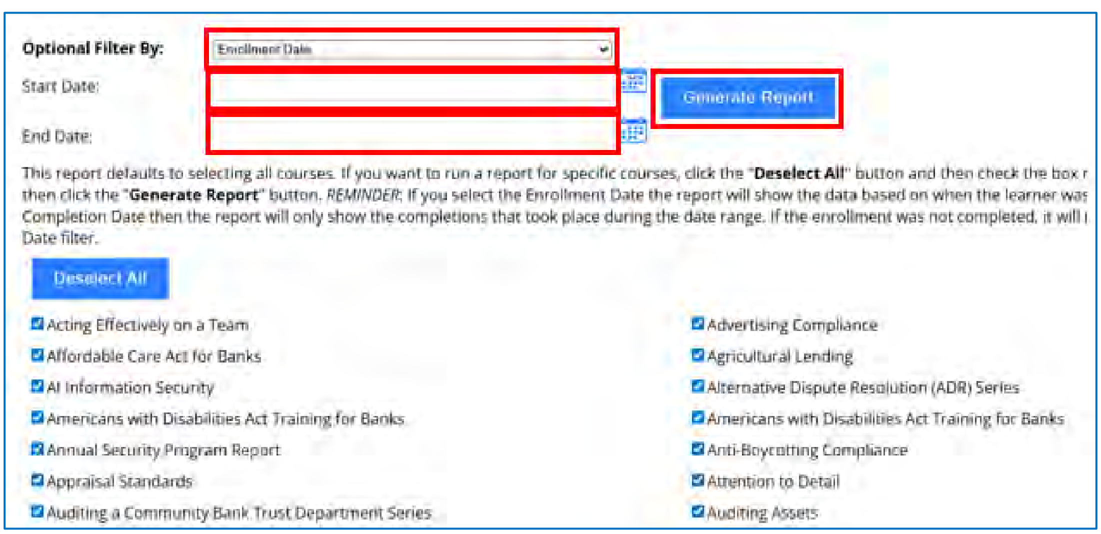
To access a complete history report for all employees and all courses follow these instructions below. This is the report that ICBA recommends to use for Best Practices cleanup prior to a new training period course enrollments as well as to display all training history for your entire staff. You can filter the results later to search on the specific fields in the results.

1. Click on the Administration tab.
2. "Click Here" next to Activity Report for Courses (excluding BDOT) under the Reports section.



3. This report defaults to have ALL courses selected, and the date parameter on the Enrollment Date. Enter the Enrollment Start Date and End Date *(YYYY-MM-DD)* of the dates in which the employee was enrolled in their courses that you want a report returned. *REMEMBER*, these dates are the dates the administrator or employee enrolled in the courses, not necessarily the dates in which the employee was to take and complete the courses.
   Click the "Generate Report" button.

   Note: You may leave the dates blank to produce an entire history report – this is what is part of the Best Practices recommendations prior to the next training period.



4. You may export the report to PDF or Excel. Click the floppy disk icon at the top of the report results, then select Adobe Acrobat or Excel 2007 for the version you wish to export. The report will save to your downloads folder.

5. Click the Administration tab to return to the main screen.

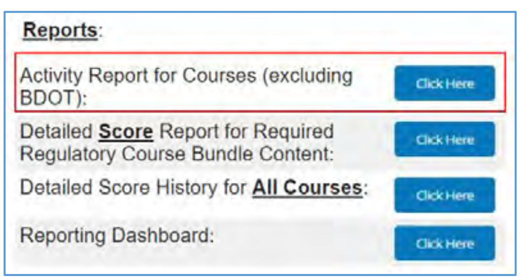
6. The "Course % Complete" column in the report results will display a value of 0% or 100% for all individual course titles that are included in subscriptions to the Standard or Custom Plans and all Bundles. It will not show what percentage they are through the individual course. For certificate programs, the value will show the actual percentage the learner has completed for the entire program.

A	B	C	D	E	F	G	H	I
Completion Date	Enrollment Date	Name	Email	Course	CPE	Status	Grade	Course % Complete
	1/24/2022 14:07	Snyder, Mandy	mandy.snyder@icba.org	Principles of Banking Certificate Program	7	Not Completed	0	15.38
2022-04-25 13:56:33	4/19/2022 16:54	Snyder, Mandy	mandy.snyder@icba.org	Principles of Banking Overview	1.25	Completed Satisfactorily	100	100
2022-11-18 12:01:10	7/20/2022 16:34	Braegelmann, Lori	lori.braegelmann@icba.org	Principles of Banking Certificate Program	7	Completed Satisfactorily	88	100
	5/20/2022 16:04	Braegelmann, Lori	lori.braegelmann@icba.org	From Peer to Supervisor	1	Not Completed	0	0
2022-04-26 17:29:14	4/26/2022 16:40	Braegelmann, Lori	lori.braegelmann@icba.org	Communicating as a Team	1	Completed Satisfactorily	80	100

All Employees & Specific Courses Reports

To access a report for all employees that completed one specific course, follow these instructions:

1. Click on the Administration tab
2. "Click Here" next to Activity Report for Courses (excluding BDOT): under the Reports section.

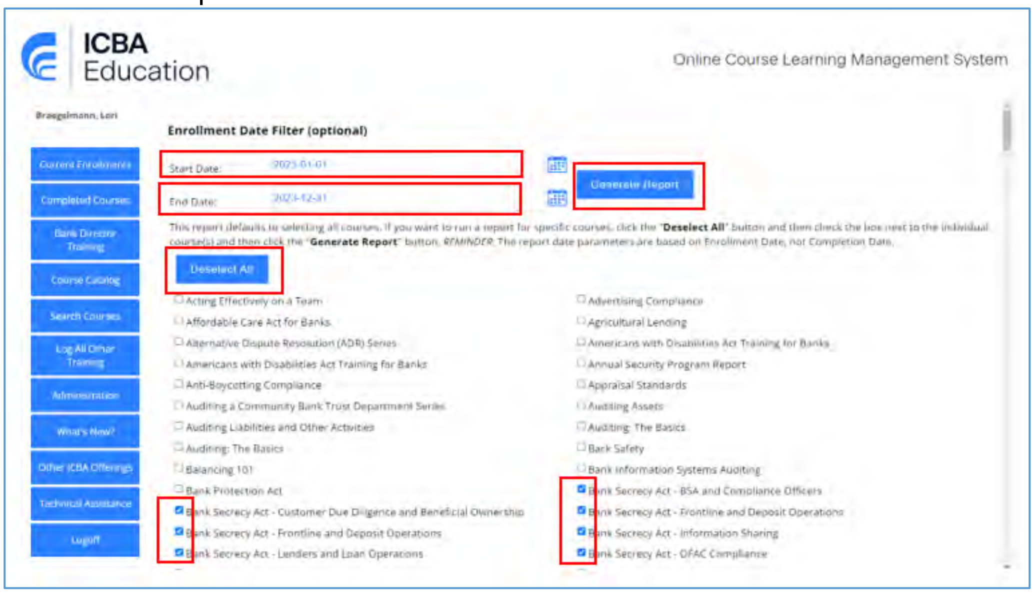


3. Choose "Enrollment Date" or "Completion Date" in the picklist depending on what type of results you wish to have the report produce. Enrollment Date is selected by default. Enter the Enrollment Start Date and End Date *(YYYY-MM-DD)* of the dates in which the employee was enrolled in their courses that you want a report returned. *REMEMBER*, these dates are the dates the administrator or employee enrolled in the

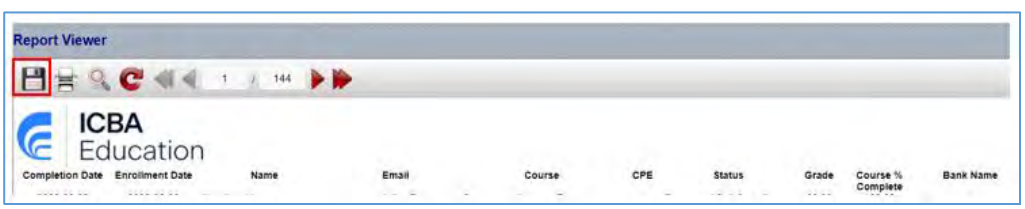
courses, not necessarily the dates in which the employee was to take and complete the courses.

Note: You may leave the dates blank to produce an entire history report for all time with Enrollment Date selected.

4. By Default, the report has all courses selected. To run the report for just specific courses click the "Deselect All" button. Then check the box(es) by just the courses you wish to be in the report results. When finished checking the course boxes, click the "Generate Report" button.



5. You may print the report as is or export the report to a PDF or Excel file by clicking on the floppy disk icon at the top of the report results. Select Adobe Acrobat or Excel to save the results to an exported file.



6. Click the Administration tab to return to the main screen.

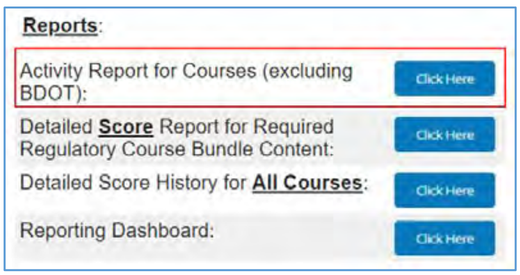
Course Completions

This section of the Administrator Guide provides two methods for reviewing Course Completions. The first option is as an Administrator, to pull a Completed Courses Report. The second option details the method for your employees to review their Completed Courses and utilize a filter on completion year.

Completed Courses Administrator Report

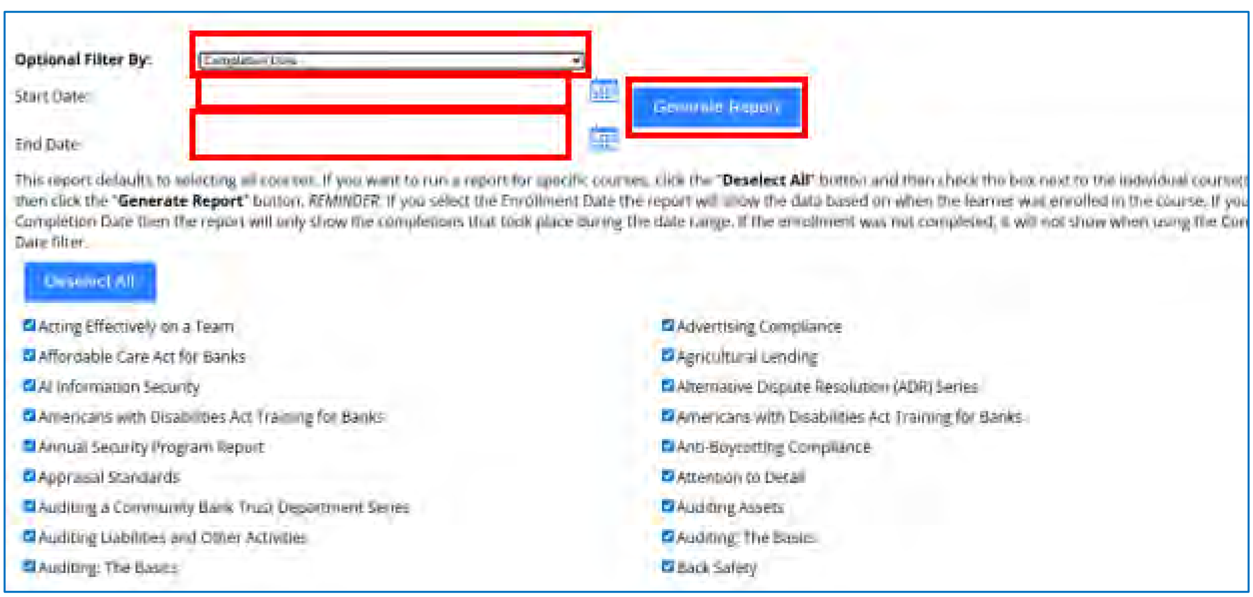
To access a report displaying completed courses for all employees, follow these instructions:

1. Click on the Administration tab
2. "Click Here" next to Activity Report for Courses (excluding BDOT): under the Reports section.

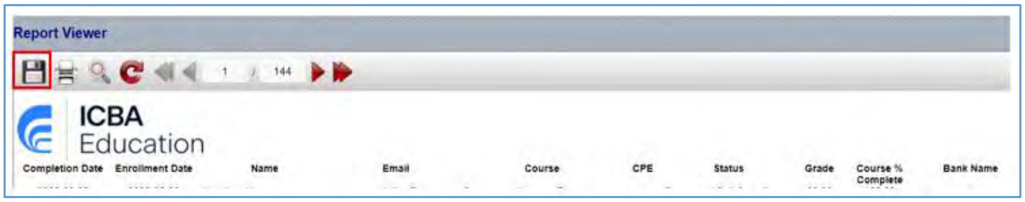


3. Change the Optional Filter By parameter to be on "Completion Date"
4. Enter the Completion Start Date and End Date *(YYYY-MM-DD)* of the dates in which the employee completed their courses that you desire to be returned in the report results.

5. By Default, the report has all courses selected. To run the report for specific courses click the "Deselect All" button. Then check the box(es) by the course(s) you wish to be included in the report results. When finished checking the course boxes, click the "Generate Report" button.



6. You may print the report as is or export the report to a PDF or Excel file by clicking on the floppy disk icon at the top of the report results. Select Adobe Acrobat or Excel to save the results to an exported file.

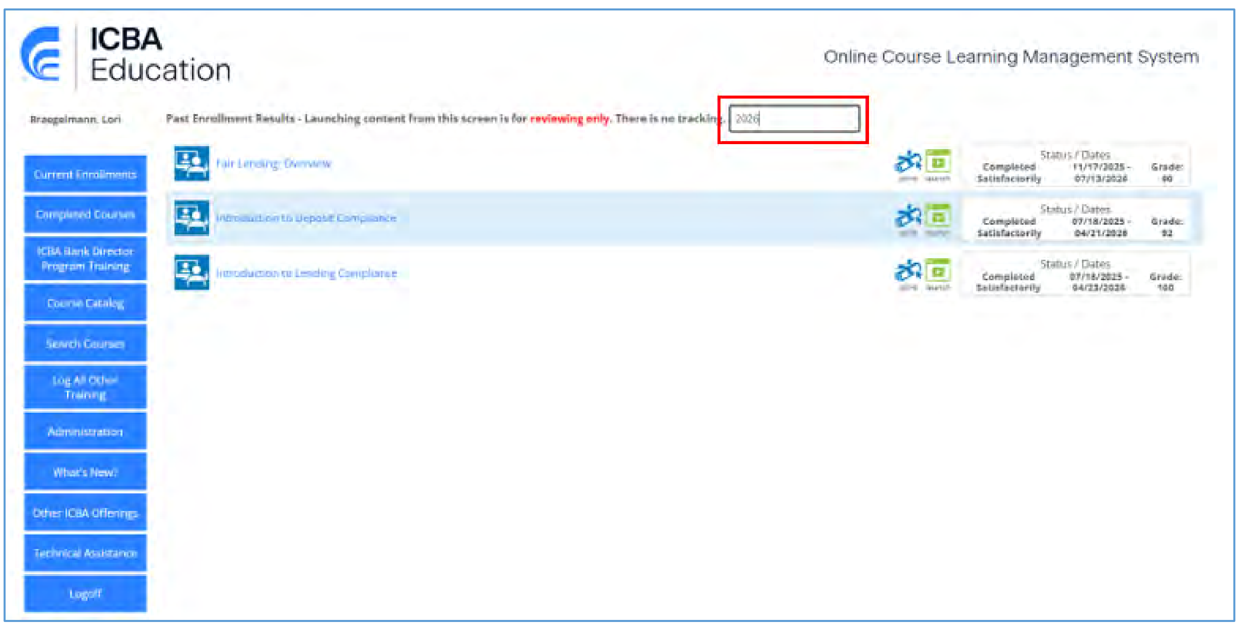


7. Click the Administration tab to return to the main screen.

Employee View of Completed Courses

Your Employees can review their course completions from their blue "Completed Courses" tab. The employee can relaunch the course from the Completed Courses tab for review purposes.

If the employee has many completions, they can utilize the filter at the top of the Completed Courses list to refine their list. The example below is demonstrating a filter to display course completions in 2026.

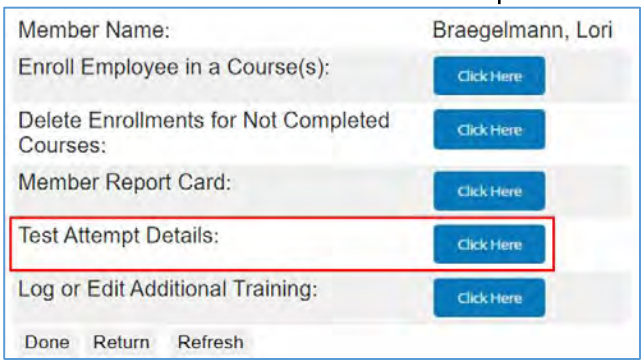


Test Attempt Details – For One Employee

To know how many times a specific employee took a test to pass a particular course and the score they received on each attempt, follow these instructions:

1. Click on the Administration tab
2. Select the employee's name from the Select Employee dropdown menu under the Administer Members section.

3. "Click Here" next to the Test Attempt Details

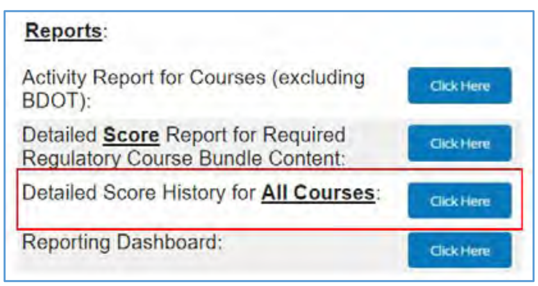


This report will show every test that was attempted for each course that employee took. The report can be exported to Excel and then sorted or filtered based on the information needed.

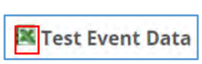
Test Attempt Details – For All Employees

To know how many times your employees took tests on all their courses and the score they received on each attempt, follow these instructions:

1. Click on the Administration tab
2. "Click Here" next to the Detailed Score History for All Courses



This report will show every test that was attempted for each course, for all employees. The screen is showing a 'preview' only. For Full results, you must export to Excel and then sort or filtered based on the information needed. Click the Excel Icon above the report results to export.



Finding Employees Who Took More Than a Specified Number of Test Attempts on a Course

You will use the same report listed above, Detailed Score History for All Courses, and export the results to Excel. The steps below are providing Excel formula recommendations to help you identify employees who have taken more than a specified number of test attempts on the same course.

Assumption: You have already filtered the report for the date range/time period you are concerned with.

1. Combine the Employee Name and Course Name into one new column.

   This is done to create a unique field of employee name with course name that can then be detected as duplicates to count.

   Open the Excel file you exported. Create a new formula to combine the values from columns D and E together, Employee Name and Course Name.

   Click in Column F – Row 2 (cell F2), enter the formula
   =D2&E2
   and press *Enter*

   If this formula only populated for cell F2 results, then you must drag this new cell down to the end of the rows of data so that this formula repeats for all rows into your new column F, and auto adjusting the cells in the formula for each row. When the cell F2 is selected, grab the bottom right corner of it to drag this formula down to the subsequent rows.

   You should see values such as "Last Name, First Name Course Name"

   Example:

Enrollment Unique Identifier	Test Event Date	Test Event Score	Member Name	Content Title	[illegible]
10648471	2/23/2023 15:50	100	Blathis, T (demo user)	Balancing 101	Blathis, T (demo user)Balancing 101
10648671	2/23/2023 17:06	90	Blathis, T (demo user)	Teller Basics	Blathis, T (demo user)Teller Basics

2. Identify Employees who have taken more than 3 Test Attempts into a new column.

   You will now be creating a formula to determine duplicate values in this new column F where it occurs more than 3 times, meaning the employee took 4 or more test attempts per course. You can change the "3" in this example to another value if you want to know a different number of test attempts. Our example is for 3.

   Click in Column G – Row 2 (cell G2), enter the formula
   =COUNTIFS($F$2:$F$35,$F2)>3
   and press *Enter*

If this formula only populated for cell G2 results, then you must drag this new cell down to the end of the rows of data so that this formula repeats for all rows into a new column G. When cell G2 is selected, grab the bottom right corner of it to drag this formula down to the subsequent rows.

This will provide a value of “TRUE” or “FALSE”. A “TRUE” value means this is an employee who has taken an exam on this course more than 3 times.

Example:

F	G
COMBINE Column D and E together to determine duplicates later	More Than 3 Test Att
Blathis, T (demo user)Balancing 101	FALSE
Blathis, T (demo user)Teller Basics	FALSE
Blathis, T (demo user)Understanding Endorsements	TRUE
Blathis, T (demo user)Understanding Endorsements	TRUE
Blathis, T (demo user)Understanding Endorsements	TRUE
Blathis, T (demo user)Understanding Endorsements	TRUE
Cooksey, S (demo user)Effective Listening	FALSE
Cooksey, S (demo user)Effective Listening	FALSE
Cooksey, S (demo user)Project Management: The Basics	FALSE
Cooksey, S (demo user)Project Management: The Basics	FALSE
Cooksey, S (demo user)Project Management: The Basics	FALSE
Hill, W (demo user)Bank Secrecy Act: Red Flags	FALSE

3. **Limit Results in Excel to show just the “TRUE” values**

Click in cell G1 and add a filter. This is the Funnel Icon in the Excel Toolbars Ribbon at the top. If you do not see this Funnel filter icon in your default Excel ribbon, go to the “Data” Menu in Excel to find the Filter option.

Now you can apply a filter in new Column G to show just those records with a value of “TRUE” as these are the employees who have taken more than 3 tests for the same course. In cell G1 click the downward looking arrow icon that appears in the right side of the cell, and select only the values of “TRUE”.

Example: Screenshot below is showing the filtered results of “TRUE” providing details to show 2 employees have taken more than 3 test attempts on a course. One employee has taken 4 tests for the course “Understanding Endorsements”, and another employee has taken 4 tests for the course “Banking Landscape”.

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Enrollm	Test Event Date	Test Event Score	Member Name	Content Title	COMBINE Column D and E together to determine duplicates later	More Than 1 Test
10648581	2/23/2023 16:06	70	Blathis, T (demo user)	Understanding Endorsements	Blathis, T (demo user)Understanding Endorsements	TRUE
10648581	2/23/2023 16:08	60	Blathis, T (demo user)	Understanding Endorsements	Blathis, T (demo user)Understanding Endorsements	TRUE
10648581	2/23/2023 16:10	50	Blathis, T (demo user)	Understanding Endorsements	Blathis, T (demo user)Understanding Endorsements	TRUE
10648581	2/23/2023 16:13	50	Blathis, T (demo user)	Understanding Endorsements	Blathis, T (demo user)Understanding Endorsements	TRUE
10200634	7/28/2022 8:40	40	Klinck, K (demo user)	Banking Landscape	Klinck, K (demo user)Banking Landscape	TRUE
10200634	7/28/2022 8:42	70	Klinck, K (demo user)	Banking Landscape	Klinck, K (demo user)Banking Landscape	TRUE
10200634	7/28/2022 8:52	50	Klinck, K (demo user)	Banking Landscape	Klinck, K (demo user)Banking Landscape	TRUE
10200634	7/28/2022 8:54	90	Klinck, K (demo user)	Banking Landscape	Klinck, K (demo user)Banking Landscape	TRUE

Special Course Reports

The Required Regulatory Course bundles will only show one line on the "Activity Report for Courses (excluding BDOT)" report. To see the details for each course completion within a Required Regulatory Course bundle, you must run separate detailed reports.

From the Administration tab, use the "Click Here" by the "Detailed Score Report for Required Regulatory Course Bundle Content:".

Reports:

Activity Report for Courses (excluding BDOT):	Click Here
Detailed **Score** Report for Required Regulatory Course Bundle Content:	Click Here
Detailed Score History for **All Courses**:	Click Here
Reporting Dashboard:	Click Here

From there, you must click the document icon to the right of the Bundle of choice to see the course completions for the required regulatory bundles courses. For example, click the document icon to the right of "Compliance Office & Staff" if you have enrolled employees in the "Required Regulatory Bundle – Compliance Officer & Staff"

Audit Staff:
Bank Security Staff:
BSA Officer & Staff:
Compliance Officer & Staff:
Deposit Staff:
Finance Staff:
Human Resource Staff:
IT Security Staff:
Lenders & Lending Staff:
Marketing Staff:
Operations Staff:
SVP & Board of Directors:

Return

The report will display any of your employees who have completed a course or course(s) from that bundle. The report will not show the courses from that bundle that have not been completed by your employees.

You can export the results to excel by clicking the Excel icon found in the upper left corner of the report screen.

ICBA Best Practices recommends you enroll your employees in each course rather than the bundle if you prefer to have all course details available to you by executing a single report.

Enroll your staff into the courses by using the option "Assign Specific Employees to Specific Courses (most common)", then select each course name rather than the Required Regulatory Course Bundle name.

CUSTOM PLAN subscribers

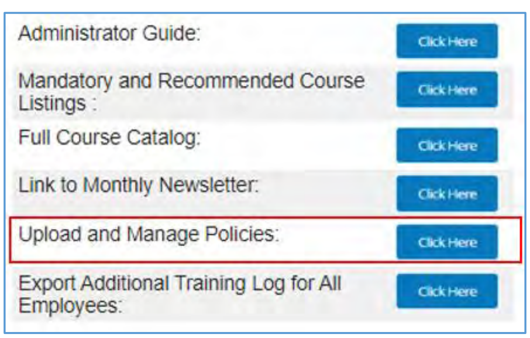
The following pages are instructions for additional functions and reporting for Custom Plan subscribers only.

Policy and Procedure Integration

Custom Plan subscribers have the ability to upload their bank's policies and procedures into a selection of ICBA online courses.

For a detailed listing of the courses available, please visit our website https://www.icba.org/education/online-training-center/bank-wide-online-training-full-library and click on the link "policy and procedures inserts here" in the Custom Plan description.

1. Click on the Administration tab
2. "Click Here" next to the Upload and Manage Policies



Each of the available courses is listed within the table. If your bank does not have a policy for a specific course title you do not have to upload a policy. When the employee clicks the link within the course they will be presented with a generic message. If you do have a policy that you want to include, click on the cloud icon ,

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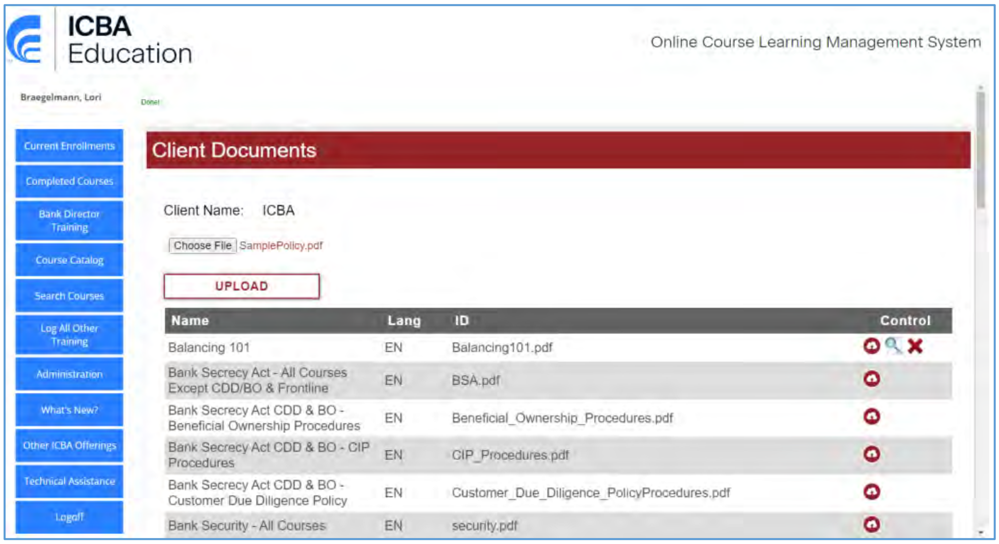
browse to and upload the policy. Once a policy has been added to the system you can use the preview icon to view it, or the delete icon ✖ to remove it.



Note:

1. Some "Names"/course titles may be listed twice with different "ID" names. This means that there is more than one place within the course that a policy or procedure may be uploaded. The "ID" title may help you determine which policy/procedure you want to upload; however, we suggest you enroll yourself in the course to review the content to be certain.

2. If you see a "Name"/course title that says: "All Courses" this means that the policy/procedure you upload will be included in a number of related courses. If your bank has more than one policy/procedure that it would like to include in the course, you must combine the documents into one PDF.

Log All Other Training

Custom Plan subscribers have the ability to track other training that employees receive that is outside of the ICBA Online Course Catalog. Entries can include other ICBA Education in-person and live-streamed events and webinars, third party training, and in-house bank training. The system allows for logging training in three ways:

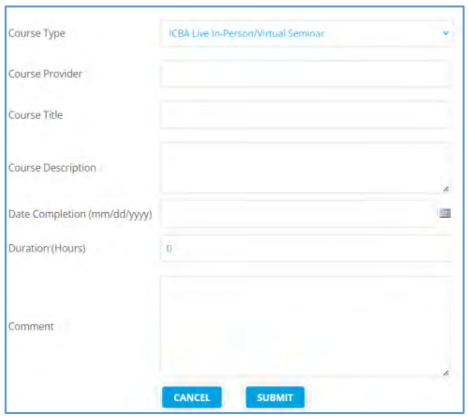
1. Employees can log their training records into the system on their own; or
2. The LMS Admin can enter the training on an employee's behalf
3. The LMS Admin Bulk Enroll Select Employees in Additional Training Log

Employee Logging

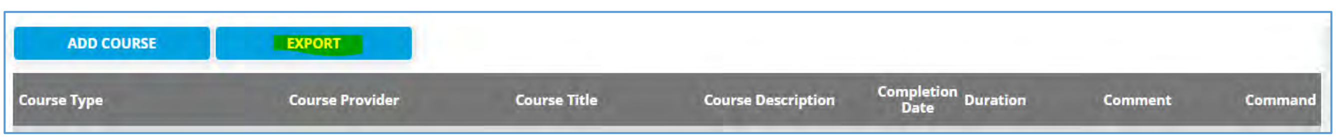
1. Click on the "Log All Other Training" tab on the left side of the screen

2. Click on the "Add Course" button

3. Complete each of the fields on the screen and click "Submit"
   a. All fields are free form except the Course Type. The appropriate course type must be chosen.

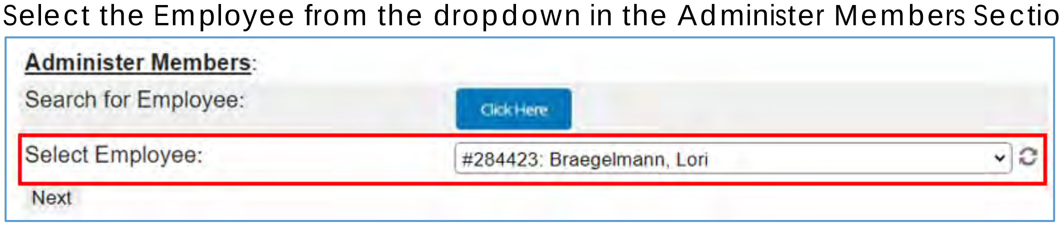


Employees can view/print their training records entered by clicking on the "Export" button. The entire log will download to Excel and can then be filtered. There are also paging options as enough data is entered to need this feature.

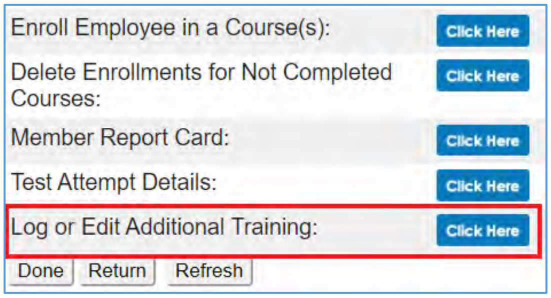


LMS Administrators Logging on Behalf of an Employee

1. Click on the "Administration" tab
2. Select the Employee from the dropdown in the Administer Members Section

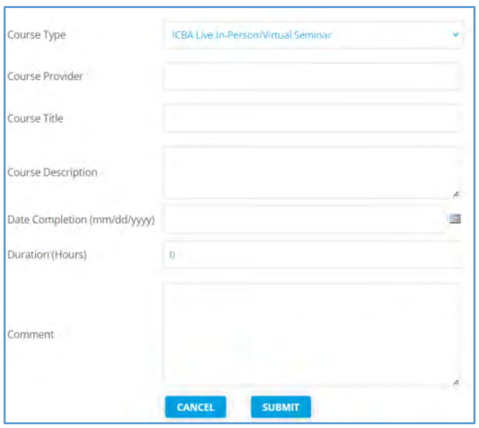


3. Click/tap the "Click Here" button next to Log or Edit Additional Training



4. Click/tap the "**Add Course**" button

5. Complete each of the fields on the screen and click "**Submit**"
   a. All fields are free-form except the Course Type. The appropriate course type must be selected from the list.



LMS Admins can view/print the individual employees records entered by clicking on the "Export" button. The entire log will download to Excel and can then be filtered. This report will only include the "other training". It does not include the online courses that are taken inside the LMS. LMS Admins can also export a report of all employees "other training" logs. Instructions on how to do this can be found in the next section (Reports).

LMS Administrators Bulk Enroll Select Employees in Additional Training Log

This option could be utilized if you have several employees who attended the same training, an example would be an In-House Training session, use your attendance sheet to additional training log.

1. Click on the "**Administration**" tab

2. Click on the "Enter Completed Additional Training for Multiple Employees:" option.

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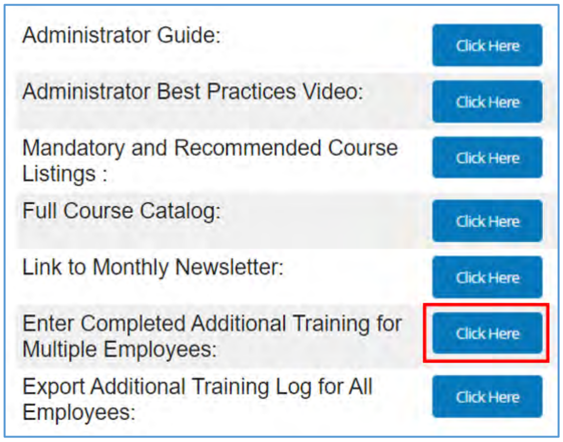

3. Complete the field selection options.

    Select Course Type → Select an option from this picklist for the type of training completed.

    Select the Employees who attended from the list of staff and move them to the empty right side employee box.

    Completion Date → Enter the date the training was completed

    Duration → Enter the time spent in this training in hours

    Comment → Enter comments as necessary (optional field)

    Check the box for "By Checking this box, you are confirming you have reviewed the above enrollments and are ready to proceed."

    Click the "Record Course Completion" box.

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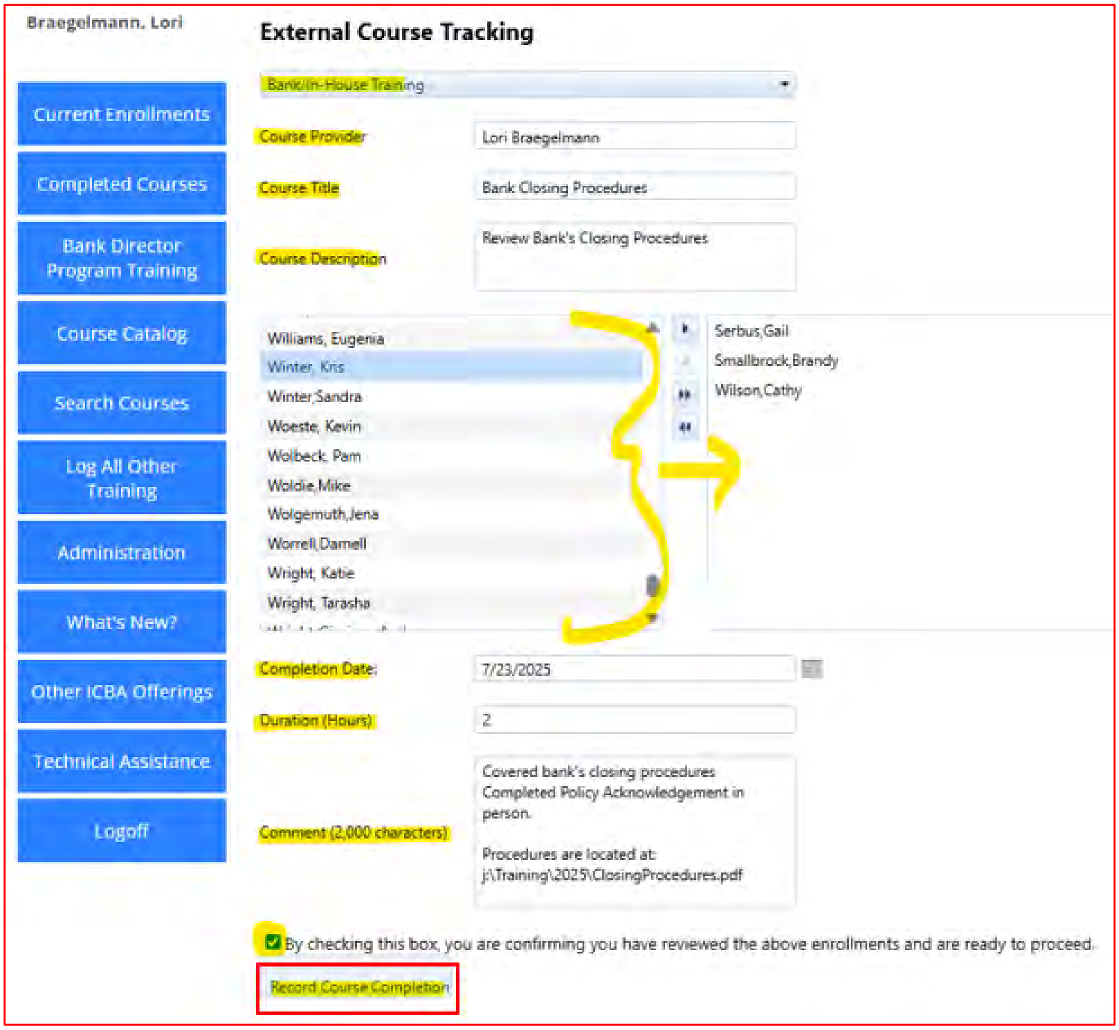


LMS Admins can utilize a report to show the training entered in the "Log All Other Training" section of the LMS from a report named "Export Additional Training Log for All Employees:". This report will only include the "other training". It does not include the online courses that are taken inside the LMS. Instructions on how to do this can be found in the next section (Reports). You can always copy and paste information from the Online Training Reports together with the Other Training report.

Reports

There are three different reporting functions for Custom Plan subscribers. All are found within the Administration Tab.

1. Enrollment and Completion Reports for Online Courses
2. Training Records for All Other Training Outside of ICBA Online Courses
3. A Reporting Dashboard

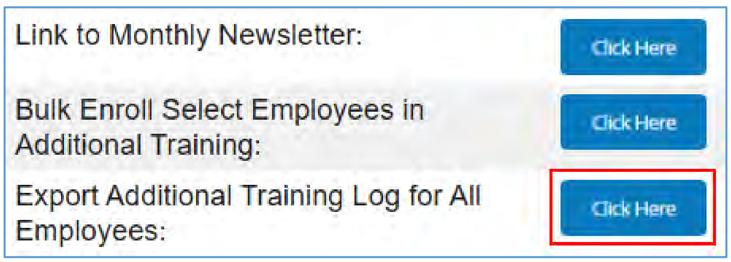
#1. Enrollment and Completion Reports for Online Courses

These reporting functions and procedures are the same as the previous section [Reporting for Standard Plan/Bundles/Bank-Wide Certificate subscribers]().

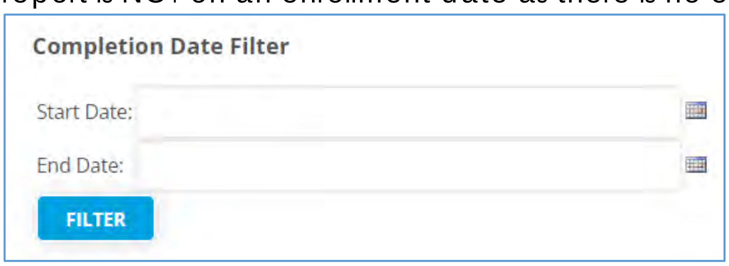
#2. All Other Training Records

If an employee or an LMS Admin logs additional training completed outside of the ICBA Online Courses LMS, the training records can be exported into a report.

1. From the "Administration" tab, Click/tap "Click Here" next to the Export Additional Training Log for All Employees



2. Enter a date range desired for the training Completion Date and click "Filter". This report is NOT on an enrollment date as there is no enrollment date for this set of data.



3. A report will be generated in Excel. The report can then be filtered based on your needs.

   Note: If you utilize the online courses in the LMS and the "log all other training", you will have two separate reports that you need to pull to get all of the training records for your records and examiners. You can copy records from the Additional Training report and paste into the Online Courses report to have one complete list.

#3. Reporting Dashboard

The Reporting Dashboard shows all employee activity with the ability to filter on student or course as well as export to CSV or PDF

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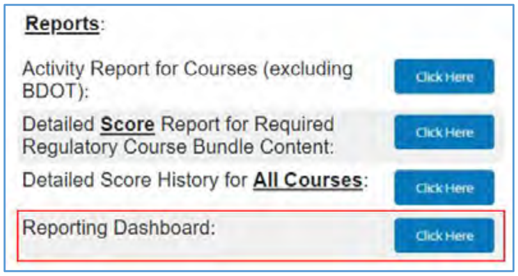
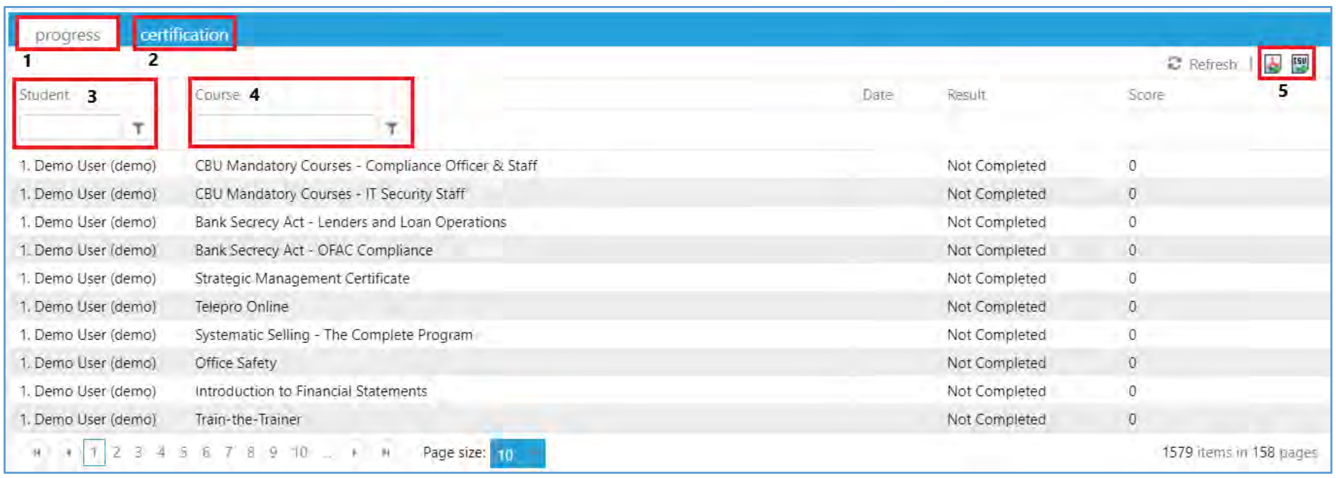
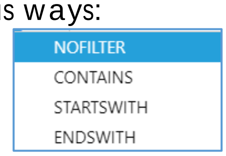


When you click on the Reporting Dashboard, this is the screen that appears:



Student	Course	Date	Result	Score
1. Demo User (demo)	CBU Mandatory Courses - Compliance Officer & Staff		Not Completed	0
1. Demo User (demo)	CBU Mandatory Courses - IT Security Staff		Not Completed	0
1. Demo User (demo)	Bank Secrecy Act - Lenders and Loan Operations		Not Completed	0
1. Demo User (demo)	Bank Secrecy Act - OFAC Compliance		Not Completed	0
1. Demo User (demo)	Strategic Management Certificate		Not Completed	0
1. Demo User (demo)	Telepro Online		Not Completed	0
1. Demo User (demo)	Systematic Selling - The Complete Program		Not Completed	0
1. Demo User (demo)	Office Safety		Not Completed	0
1. Demo User (demo)	Introduction to Financial Statements		Not Completed	0
1. Demo User (demo)	Train-the-Trainer		Not Completed	0

1. The Progress Tab displays all employees and all enrolled courses for your bank.
2. The Certification Tab is for those banks that are part of the Bank Director Program. The Bank Director Training enrollments are found in this tab
3. The Student filter allows you to enter in an employee name and filter the listing in various ways:



4. The Course filter allows you to enter in a course name or part of a course name and filter the listing in the same ways as the student filter. This feature is great when you need to generate a report for all courses that are related to a specific subject, such as Bank Secrecy Act, Regulation Z, Robbery, etc.
5. The report can be downloaded in PDF or CSV format by clicking the appropriate icon in the upper right.

Note: This Dashboard is only for Online Courses. It does not contain "All Other Training" records.