

JULY 2022



# ONLINE TRAINING

Administrator Guide »

COMMUNITY BANKER  
**UNIVERSITY**<sup>®</sup>   
powered by ICBA

LEARN **MORE.** LEARN **FORWARD.**



## Table of Contents

SPECIAL NOTES BEFORE YOU GET STARTED .....	2
Network Requirements .....	2
Computer and Internet Connection .....	2
Mobile testing recommendations .....	3
Knowledge Base .....	4
Additional Notes.....	4
ROSTER/EMPLOYEE/ORGANIZATION MANAGEMENT .....	5
Adding a New Employee .....	6
Removing an Employee.....	10
Editing <b>an Employee's Account</b> .....	11
Password Resets .....	13
Managing Your Organization .....	15
COURSE ENROLLMENTS .....	18
Single Employee.....	18
Bulk Enroll ALL Employees in a Course(s).....	19
Bulk Enroll Select Employees in a SINGLE Course.....	20
Bulk Enroll Select Employees in Select Courses .....	21
REPORTING for Standard Plan subscribers .....	23
Single Employee Report .....	23
All Employees & All Courses Report.....	24
All Employees & Specific Courses Reports .....	25
Test Attempt Details.....	25
Special Course Reports .....	26
REPORTING for Custom Plan subscribers .....	27
POLICY & PROCEDURE INTEGRATION for Custom Plan subscribers .....	28

## SPECIAL NOTES BEFORE YOU GET STARTED

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
  - ms01.streaming.mediaservices.windows.net
- 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.
- 3) Most video content contained within our eLearning courses is streamed from and stored in Microsoft Azure Media Services. Please ensure traffic is allowed on the following ports:
  - RTMP (and RTMPT) uses ports 80, 44

### Computer and Internet Connection

Item	PC	Mac
Hardware Specification	<ul style="list-style-type: none"> <li>• Screen resolution: 1024 x 768 (or above); Internet connection: 5Mbps (megabits per second) or above for a single user as many of our courses contain streaming video.</li> </ul>	<ul style="list-style-type: none"> <li>• 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.</li> </ul>
Memory (when playing video)	<ul style="list-style-type: none"> <li>• At least 4GB of RAM</li> </ul>	<ul style="list-style-type: none"> <li>• At least 4GB of RAM</li> </ul>
Operating System	<ul style="list-style-type: none"> <li>• Windows 7 or higher</li> </ul>	<ul style="list-style-type: none"> <li>• Mac OS X 10.9 or higher</li> </ul>

Browser Version	<ul style="list-style-type: none"> <li>• Google Chrome, version 44+</li> <li>• Microsoft Edge, version 81+</li> <li>• Mozilla Firefox, version 44+</li> </ul>	<ul style="list-style-type: none"> <li>• Chrome, version 44+</li> <li>• Safari, version 15+</li> </ul>
Cookies	<ul style="list-style-type: none"> <li>• 3<sup>rd</sup> party cookies must be accepted</li> </ul>	<ul style="list-style-type: none"> <li>• 3<sup>rd</sup> party cookies must be accepted</li> </ul>
JavaScript	<ul style="list-style-type: none"> <li>• JavaScript must be enabled</li> </ul>	<ul style="list-style-type: none"> <li>• JavaScript must be enabled</li> </ul>
Popup Blockers	<ul style="list-style-type: none"> <li>• Turn off and disable all popup blockers</li> </ul>	<ul style="list-style-type: none"> <li>• Turn off and disable all popup blockers</li> </ul>

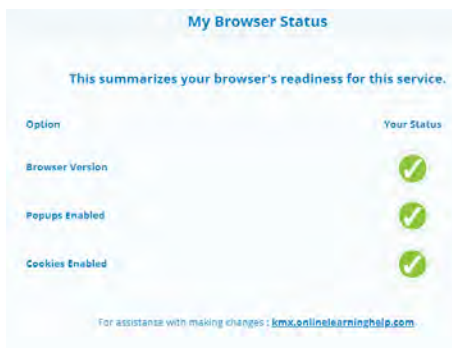
Many organizations have group policies and other security settings for Browsers that may hamper the ability for the courseware to load. While we may assist in identifying issues, we are unable to customize the courseware to work around internal IT policies.

### 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 blocker

### 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 ([cbu.onlinelearninghelp.com](http://cbu.onlinelearninghelp.com)).

### Courses Not Completing

If an employee tells you that they completed a course, passed the test and it is not moving from the Current Enrollment 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 after they have passed the test and exited the course that they waited for the screen to refresh back to the Current Enrollments screen
- If the course did not move to completed on the day they completed the course, wait until the next day to see it moved
- If all of the steps above have been taken and the courses is still in their Current Enrollments, contact Community Banker University ([communitybankeruniversity@icba.org](mailto:communitybankeruniversity@icba.org)) with the following information:
  - Name
  - Email Address
  - Course Title
  - Date of Completion
  - Test score

### 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 ([cbu.onlinelearninghelp.com](http://cbu.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



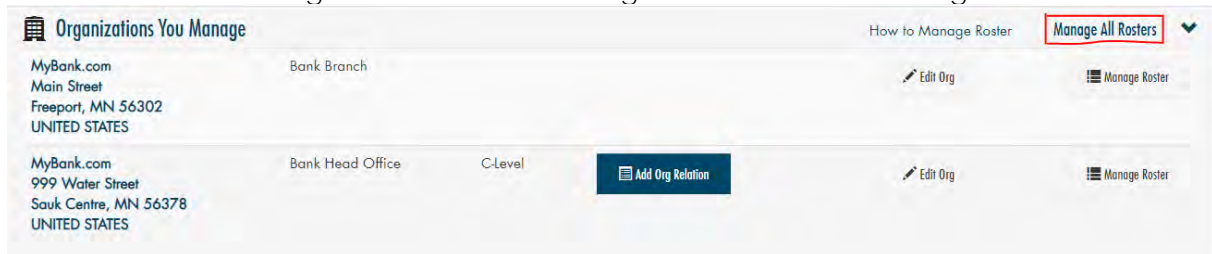
- Throughout this Guide the Online Training System is referred to as “LMS” which stands for Learning Management System.
- Each ICBA member/nonmember bank and all individual employees of each bank (Roster/Employee/Organization Management) are created and maintained in the ICBA core system, not within 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 18 are done within the LMS.

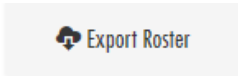
## ROSTER/EMPLOYEE/ORGANIZATION MANAGEMENT

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

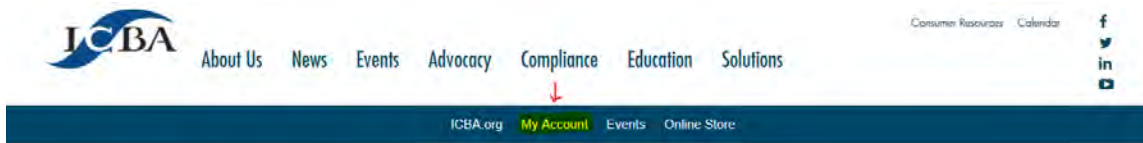
your bank, what location they are at and other details. To export your roster, follow these steps:

1. Go to [www.icba.org](http://www.icba.org).
2. Click on Member Login in the upper right corner.
3. Enter your e-mail and password for your ICBA Account.
4. Click on My Account in the upper right corner.
5. Scroll down to the Organizations You Manage box and click Manage All Rosters.



6. In the upper right, click the Export Roster button .
7. Your bank's roster will be exported to an Excel document. Use this document to work from to determine who is missing, needs to be edited, or removed.

If at any time you need to get back to your "Organizations You Manage" or "My Profile" screen, click the My Account link in the blue line under the ICBA website directories.



## [Adding a New Employee](#)

There are two ways in which a new employee can be added to the system. The employee may set up their own account (if they have a legitimate e-mail address) which will connect them to the bank OR the LMS Administrator can add the new employee to the banks Roster.

Employee creating own account:

1. Go to [www.icba.org](http://www.icba.org).
2. Click on Member Login in the upper right corner.
3. Click on Create an account in the "Login" box.
4. Enter your e-mail address, a password, and click Continue.  
An e-mail will be sent to the e-mail address entered in Step #4 with instructions to complete your account setup. Two things to note regarding the e-mail and continued account setup:

- a. To receive appropriate access rights and ICBA benefits, make sure that you select an organization from the dropdown list of existing organizations.
- b. The link is valid for 24 hours from the time of receipt and can only be clicked on once.

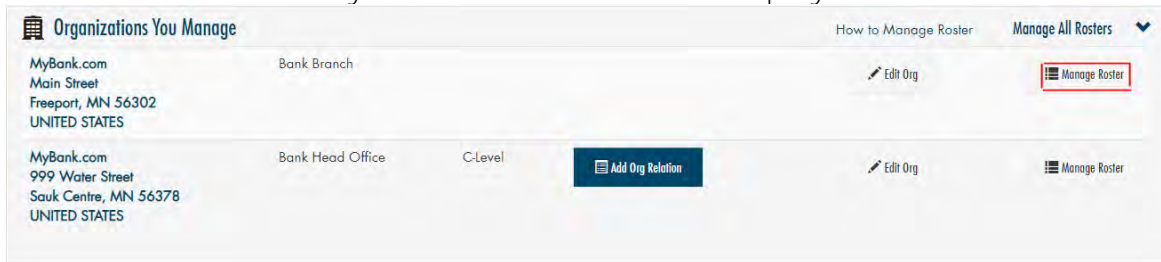
The e-mail will come from [info@icba.org](mailto:info@icba.org). Please check your spam or quarantine to find the e-mail. Also, ask your IT department to whitelist the following in order to receive e-mails:

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

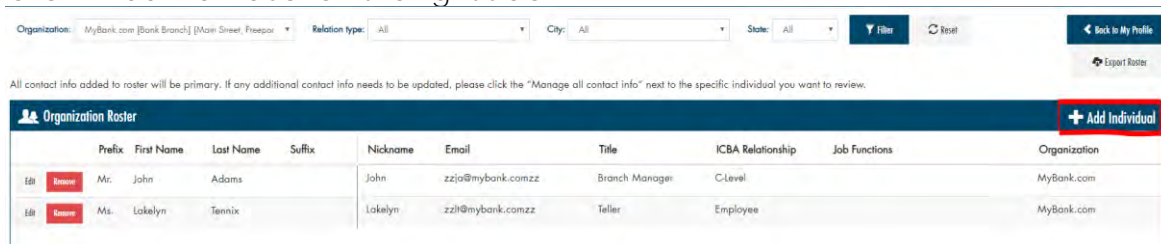
Whitelisting ICBA's email domain does not affect your bank's email security or deactivate your spam filter.

LMS Administrator creating new account:

1. Go to [www.icba.org](http://www.icba.org).
2. Click on Member Login in the upper right corner.
3. Enter your e-mail and password for your ICBA Account.
4. Click on My Account in the upper right corner.
5. Scroll down to the Organizations You Manage box and click the Manage Roster button next to Location you want to add the new employee to.



6. Click +Add Individual on the right side



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 missed case (both upper and lowercase letters) and standard capitalization rules.

Prefix	First Name	Last Name	Suffix	Nickname
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Email	No Email Available	New Password	Confirm Password	Title	ICBA Relationship	Job Functions
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Employee	<input type="text"/>

- 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 beginning on Page 10 of this Guide.
  - ii. If you *do* create a password for another employee, the employee will receive an e-mail from [info@icba.org](mailto: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](http://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](mailto: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. They just cannot reset their password on their own if they have forgotten it.

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

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

Email	No Email Available	New Password	Confirm Password	Title	ICBA Relationship	Job Functions
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Employee *	<input type="text"/>

- Title – Required field.
- ICBA Relationship – Required field. This field determines what the employee can do within the bank's online ICBA account. Choose one of the following from the dropdown:
  - Employee* – Can manage their own account and no others.
  - Middle Manager* – Can manage individuals only at the location they are linked to.
  - 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.
- Job Functions – This field is used to capture an employee's role within the bank. You may start typing a job function and the available fields will appear for you to choose from, or you can click in the field with your mouse and the entire list will appear for you to choose from. You may enter/choose more than one job function by entering them individually or holding the Control button on your keyboard while selecting from the dropdown.

Organization	Address Type	Adr line 1	City	State	Zip	Phone	Fax
<input type="text"/>	USPS Address *	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- 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.
- When all fields are complete, click the Save button on the left side of the screen.
  - 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 and notate the system-generated e-mail address.


10. If a potential duplicate account is found in the system that is similar to the one you are attempting to add, the following screen will appear:

Duplicate records found.

If the individual you are adding is **not an exact match** in the list below, [Click here](#) to add the new individual.

If the individual you are adding is in the list below, click **Edit This Individual** next to the name.

If you need further assistance, please contact ICBA at 800-422-7285.

 Accounts Found:			
<a href="#">Edit This Individual</a>	414517	Johnson, Cindy	
<a href="#">Edit This Individual</a>	599064	Jensen, Cindy	

- a. 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 Organization of a potential match appears and is the same as your Organization but the person is at a different location, click Edit This Individual and change their Organization (location). After editing, click the Save button.
  - If an Organization of a potential match appears and it looks like the Organization that your new employee worked at before, double check with the individual first, then click Edit This Individual and change all of the appropriate fields to match their current position at your bank. After editing, click the Save button.
  - 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 next to the new entry you started.
- 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, click on [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 deleted, and then return to the bank to work. Even though they were removed from your bank, they are not removed from the ICBA system.

NOTE: New accounts created by the LMS Administrator are pushed to the LMS within 30 minutes of their creation. Once this push occurs, you may log into the LMS and enroll them in courses.

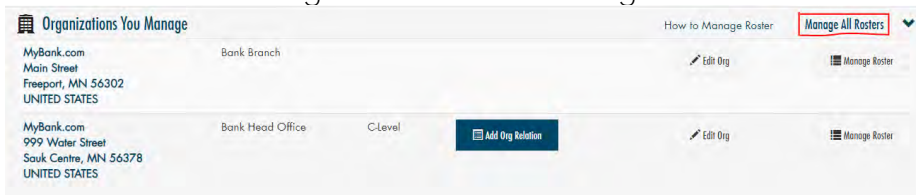
### [Removing an Employee](#)

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](http://www.icba.org).
2. Click on Member Login in the upper right corner.
3. Enter your e-mail and password for your ICBA Account.
4. Click on My Account in the upper right corner.
5. Scroll down to the Organizations You Manage box and click Manage All Rosters.



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 to 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
Remove	Mr.	John	Adams		John	zaj@mybank.com.zz	Branch Manager	C-Level		MyBank.com
Remove	Mr.	Jason	Anderson		Jason	zj@mybank.com.zz	Vice President	Employee		MyBank.com
Remove	Ms.	Marquita	Gonzalez		Marquita	783821@commbanku.com	Cashier	Employee	customer cashier, cashier	MyBank.com
Remove	Ms.	Anna	Lincoln		Anna	783816@commbanku.com	Teller	Employee		MyBank.com
Remove	Mr.	John	Smith		John	zsj@mybank.com.zz	President	C-Level		MyBank.com
Remove	Ms.	Cheryl	Tennos		Cheryl	783817@commbanku.com	Customer Service Repres	Employee		MyBank.com
Remove	Ms.	Lakelyn	Tennix		Lakelyn	zzh@mybank.com.zz	Teller	Employee		MyBank.com

7. When you find the employee, click the Remove button.
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](http://www.icba.org).
2. Click on Member Login in the upper right corner.

3. Enter your e-mail and password for your ICBA Account.
4. Click on My Account in the upper right corner.
5. Scroll down to the Organizations You Manage box. You may click on Manage Roster next to the specific branch that the employee is located at or if you are not sure which location, you can click on Manage All Rosters.

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 to 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.

All contact info added to roster will be primary. If any additional contact info needs to be updated, please click the "Manage all contact info" next to the specific individual you want to review.

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

7. Once you find the 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
    - ii. E-mail address
    - iii. Organization/Location
    - iv. Title
    - v. ICBA Relationship
    - vi. Job Function
  - b. Click the Manage all contact info button found by scrolling all the way to the right, if you want to edit the individuals contact information such as:
    - i. Phone
    - ii. Fax
    - iii. Additional Individual Address

- iv. Additional e-mail addresses
8. Edit all applicable fields.
9. Once all changes are complete, click the Save or Close button.

#### Adding an LMS Administrator

The system allows you to add an additional LMS Administrator(s). Follow the "Editing an Employees Account" instructions above. You will need to change the employee's ICBA Relationship to "C-Level" and add the Job Function "LMS Administrator".

#### 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. Have the employee follow these instructions:

1. Go to [www.icba.org](http://www.icba.org).
2. Click on Member 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.*

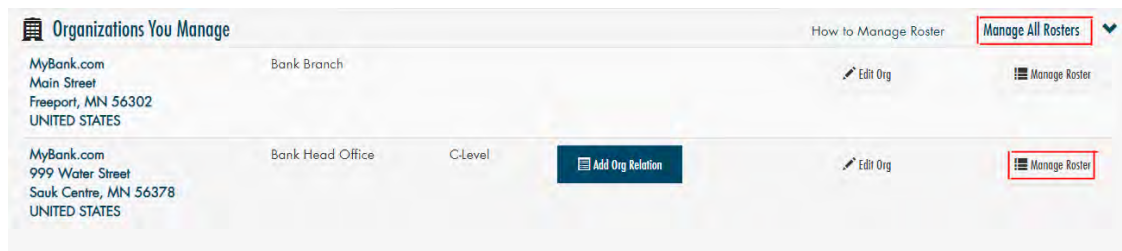
The e-mail will come from [info@icba.org](mailto:info@icba.org). Please check your spam or quarantine to find the e-mail. Also, ask your IT department to whitelist the information below in order to receive e-mails. **Whitelisting ICBA's email domain does not affect your bank's email security or deactivate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

- IP addresses (205.201.42.27 and 205.201.40.208),
- domain [icba.org](http://icba.org), and
- main email address [info@icba.org](mailto:info@icba.org)

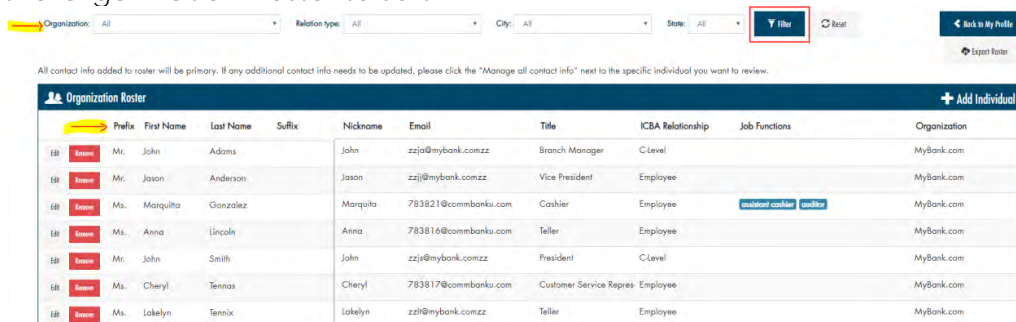
##### LMS Administrator Resets Employees Password

An LMS Administrator can reset an employee's password within the ICBA website. Follow these instructions:

1. Go to [www.icba.org](http://www.icba.org).
2. Click on Member Login in the upper right.
3. Enter your e-mail and password for your ICBA account.
4. Click on My Account in the upper right corner.
5. Scroll down to the Organizations You Manage box. You may click on Manage Roster next to the specific branch that the employee is located at or if you are not sure which location, you can click on Manage All Rosters.



- From this screen you can filter and sort the report in several ways to find the employee you want to reset or simply click to 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.



- Once you find the employee, click the Edit button on the left side of the screen next to the individual.
- Tab or scroll and click to the "New Password" field.
- Enter in a new password and enter it again in the "Confirm Password" field.
- Click the Save button on the left side.
- The employee will receive an e-mail from [info@icba.org](mailto: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've logged in. Provide the employee with the following instructions:

- Go to [www.icba.org](http://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](mailto: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. They just cannot reset their password on their own if they have forgotten it.

## CBU Team Member Resets Password

You can contact a CBU team member at [communitybankeruniversity@icba.org](mailto:communitybankeruniversity@icba.org) or call 1-800-422-7285 to have the password reset. If CBU 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 in a merger situation can be tricky. If you have any questions regarding creating a new Organization or adding a Relationship, please contact [info@icba.org](mailto:info@icba.org) or 1-800-422-7285 for assistance.

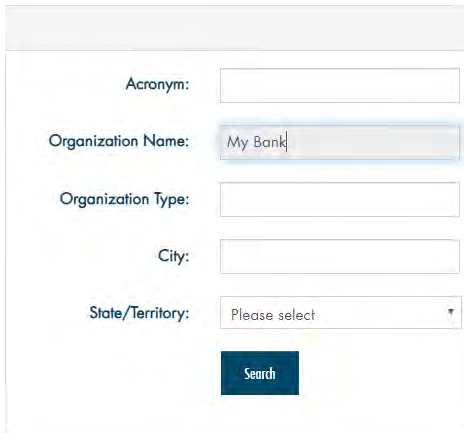
### Adding a new Branch

1. Go to [www.icba.org](http://www.icba.org).
2. Click on Member Login in the upper right.
3. Click on My Account in the upper right corner.
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.

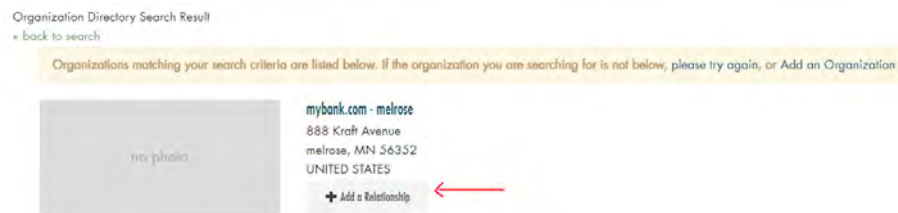




- a. If no organizations are found, click “Add an Organization”



- 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 a CBU team member for assistance.

#### Editing an Organization

1. Go to [www.icba.org](http://www.icba.org).
2. Click on Member Login in the upper right.
3. Click on My Account in the upper right corner.
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.

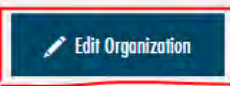
 **Details** Your role: C-Level

---

**Name:** MyBank.com  
**Type:** Bank Branch

 *Main Street  
Freeport, MN 56302*

---

6. Edit the necessary fields and click the Save button at the bottom.
7. To get back to your "Organization You Manage" or "My Profile" screen, click the My Account link in the blue line under the ICBA website directories.



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

The instructions in the remainder of this Guide require the user to have LMS Administrator rights. If you do not see the Administration Tab once you are logged into the Online Training Center, you do not have Admin rights. Please contact a CBU Team member if you do not see this tab and should.

## COURSE ENROLLMENTS

There are four ways to enroll employees into courses:

1. Enrollment for Single Employee
2. Bulk Enroll All Employees in a Course
3. Bulk Enroll Select Employees in a Course
4. Bulk Enroll Select Employees in Select Courses

### Single Employee

To manage enrollments for a single employee follow these instructions:

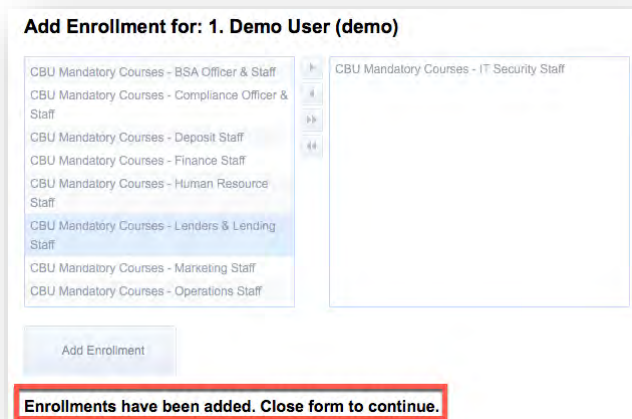
1. Click on the Administration tab
2. Select the employee's name from the Select Employee dropdown menu under the Administer Members section.

Administrator Guide:	<a href="#">Click Here</a>
Mandatory and Recommended Course Listings :	<a href="#">Click Here</a>
Full Course Catalog:	<a href="#">Click Here</a>
<b>Reports:</b>	
BDOT Status Report for Current Year:	<a href="#">Click Here</a>
BDOT Summary Report for Current Year:	<a href="#">Click Here</a>
BDOT Activity Report for <b>All</b> Years:	<a href="#">Click Here</a>
BDOT Manual Completion Tracking:	<a href="#">Click Here</a>
Activity Report for <b>All</b> Non-Bank Director Courses:	<a href="#">Click Here</a>
Activity Report for <b>Select</b> Non-Bank Director Courses (Please be patient on loading):	<a href="#">Click Here</a>
Detailed <b>Score</b> Report for CBU Mandatory Course Content:	<a href="#">Click Here</a>
Detailed <b>Score</b> Report for Frontline Essentials: BSA Compliance Course:	<a href="#">Click Here</a>
<b>Bulk Enroll:</b>	
Bulk Enroll <b>All</b> Employees in a Course:	<a href="#">Click Here</a>
Bulk Enroll <b>Select</b> Employees in a Course:	<a href="#">Click Here</a>
Bulk Enroll <b>Select</b> Employees in <b>Select</b> Courses:	<a href="#">Click Here</a>
<b>Administer Members:</b>	
Select Employee:	#542816: Snyder, Mandy ▾
Search for Employee:	<a href="#">Click Here</a>
<a href="#">Next</a>	

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

Member Name:	Snyder, Mandy
Enroll Employee in a Course(s):	<a href="#">Click Here</a>
Delete Enrollments for Not Completed Courses:	<a href="#">Click Here</a>
Member Report Card:	<a href="#">Click Here</a>
Test Attempt Details:	<a href="#">Click Here</a>
<a href="#">Done</a>	<a href="#">Return</a> <a href="#">Refresh</a>

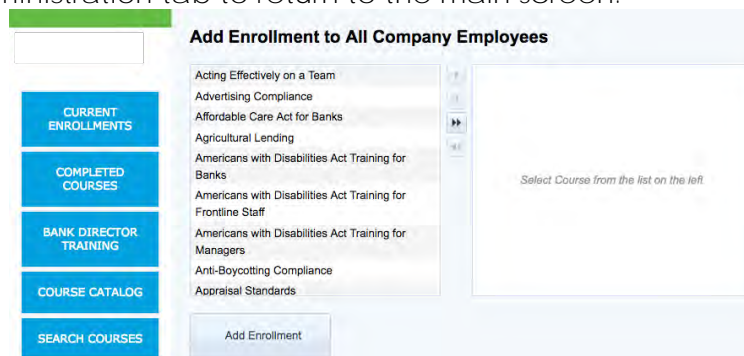
4. Double click the desired course OR click and highlight the desired course and click the single arrow to move the course from the available courses window on the left to the enrollment list window on the right. Do this for each course you would like to enroll the employee in.
5. When you are finished adding the course(s), click the Add Enrollment button.
6. When the enrollment is successful you will see the message outlined below. Click the Administration tab to return to the main screen.



### Bulk Enroll ALL Employees in a Course(s)

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

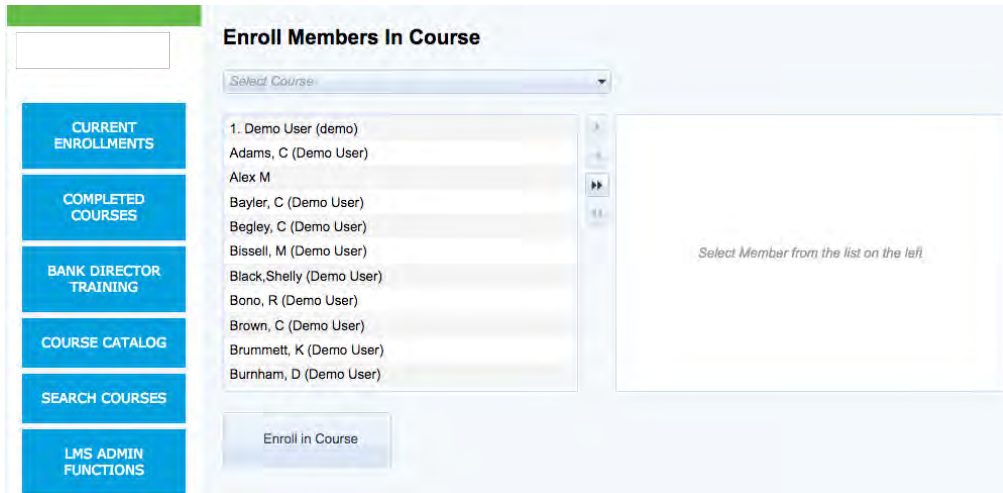
1. Click on the Administration tab
2. **“Click Here”** next to Bulk Enroll All Employees in a Course under the Bulk Enroll section.
3. Double click the desired course OR click and highlight the desired course and click the single arrow to move the course from the available courses window on the left 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), click the Add Enrollment button.
5. Click the Administration tab to return to the main screen.



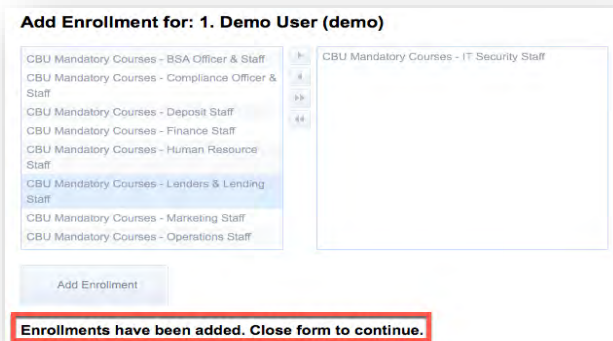
Bulk Enroll **Select** Employees in a **SINGLE** Course

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

1. Click on the Administration tab
2. "Click Here" next to Bulk Enroll Select Employees in a Course under the Bulk Enroll 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, click the Enroll in Course button.
6. Click the Administration tab to return to the main screen.



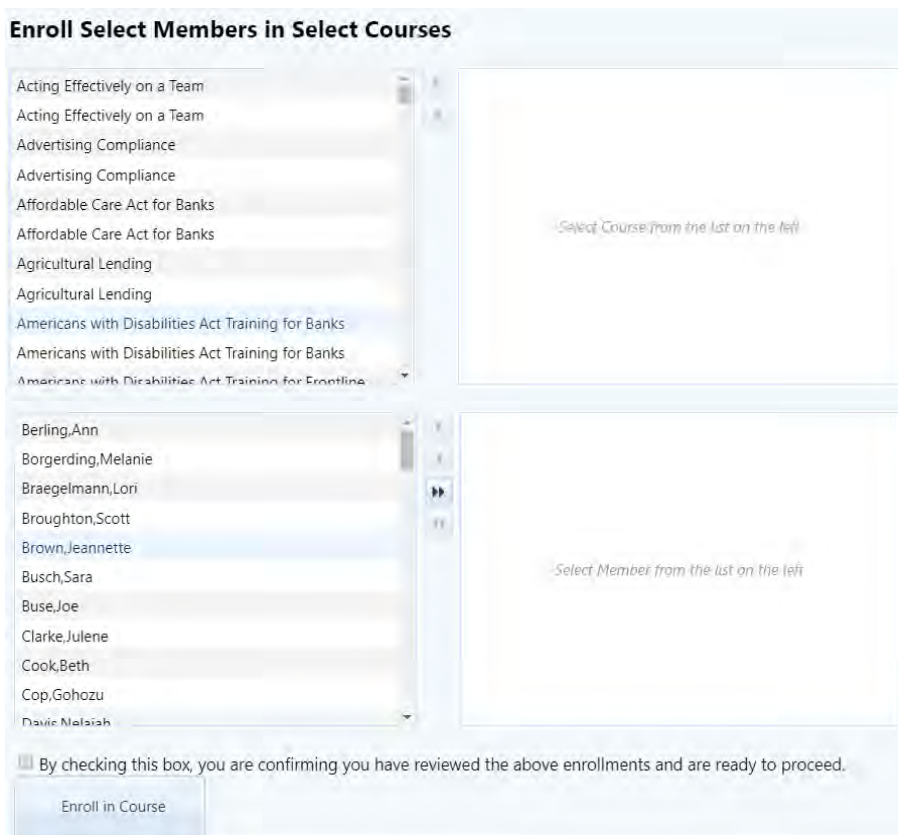
7. When the enrollment is successful you will see the message below. Click the Administration tab to return to the main screen.



[Bulk Enroll](#) [Select Employees](#) in [Select Courses](#)

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

1. Click on the Administration tab
2. **“Click Here”** next to Bulk Enroll Select Employees in Select Courses under the Bulk Enroll 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. Then check the box in front of the confirmation “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.



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:

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

Administrator Guide: [Click Here](#)  
 Mandatory and Recommended Course Listings : [Click Here](#)  
 Full Course Catalog: [Click Here](#)

**Reports:**  
 BDOT Status Report for Current Year: [Click Here](#)  
 BDOT Summary Report for Current Year: [Click Here](#)  
 BDOT Activity Report for **All** Years: [Click Here](#)  
 BDOT Manual Completion Tracking: [Click Here](#)  
 Activity Report for **All** Non-Bank Director Courses: [Click Here](#)  
 Activity Report for **Select** Non-Bank Director Courses (Please be patient on loading): [Click Here](#)  
 Detailed **Score** Report for CBU Mandatory Course Content: [Click Here](#)  
 Detailed **Score** Report for Frontline Essentials: BSA Compliance Course: [Click Here](#)

**Bulk Enroll:**  
 Bulk Enroll **All** Employees in a Course: [Click Here](#)  
 Bulk Enroll **Select** Employees in a Course: [Click Here](#)  
 Bulk Enroll **Select** Employees in **Select** Courses: [Click Here](#)

**Administer Members:**  
 Select Employee: #542816: Snyder, Mandy [Click Here](#)  
 Search for Employee: [Click Here](#)

[Next](#)

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

Member Name: Snyder, Mandy  
 Enroll Employee in a Course(s): [Click Here](#)  
 Delete Enrollments for Not Completed Courses: [Click Here](#)  
 Member Report Card: [Click Here](#)  
 Test Attempt Details: [Click Here](#)

[Done](#) [Return](#) [Refresh](#)

4. On the next screen, you will see a list of the courses the employee is currently enrolled in. To delete a course, double click the select 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.

## REPORTING for Standard Plan subscribers

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.

Administrator Guide:	<a href="#">Click Here</a>
Mandatory and Recommended Course Listings :	<a href="#">Click Here</a>
Full Course Catalog:	<a href="#">Click Here</a>
<b>Reports:</b>	
BDOT Status Report for Current Year:	<a href="#">Click Here</a>
BDOT Summary Report for Current Year:	<a href="#">Click Here</a>
BDOT Activity Report for <b>All</b> Years:	<a href="#">Click Here</a>
BDOT Manual Completion Tracking:	<a href="#">Click Here</a>
Activity Report for <b>All</b> Non-Bank Director Courses:	<a href="#">Click Here</a>
Activity Report for <b>Select</b> Non-Bank Director Courses (Please be patient on loading):	<a href="#">Click Here</a>
Detailed <b>Score</b> Report for CBU Mandatory Course Content:	<a href="#">Click Here</a>
Detailed <b>Score</b> Report for Frontline Essentials: BSA Compliance Course:	<a href="#">Click Here</a>
<b>Bulk Enroll:</b>	
Bulk Enroll <b>All</b> Employees in a Course:	<a href="#">Click Here</a>
Bulk Enroll <b>Select</b> Employees in a Course:	<a href="#">Click Here</a>
Bulk Enroll <b>Select</b> Employees in <b>Select</b> Courses:	<a href="#">Click Here</a>
<b>Administer Members:</b>	
Select Employee:	#542816: Snyder, Mandy ▾
Search for Employee:	<a href="#">Click Here</a>
<a href="#">Next</a>	

3. "Click Here" next to the Member Report Card.

Member Name:	Snyder, Mandy
Enroll Employee in a Course(s):	<a href="#">Click Here</a>
Delete Enrollments for Not Completed Courses:	<a href="#">Click Here</a>
<b>Member Report Card:</b>	<a href="#">Click Here</a>
Test Attempt Details:	<a href="#">Click Here</a>
<a href="#">Done</a> <a href="#">Return</a> <a href="#">Refresh</a>	



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 from. 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 get an entire history report.*

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. You can also print the report from Excel.

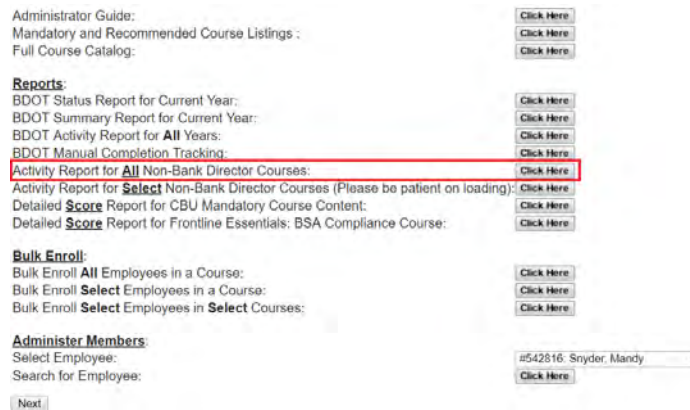
 **Individual Learner Report - All Enrollments**

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:


1. Click on the Administration tab.
2. "Click Here" next to Activity Report for All Non-Bank Director Courses under the Reports section.



3. 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 from. 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 get an entire history report.*

4. You may print the report as is or export the report to an Excel file by clicking on the Excel icon at the top.

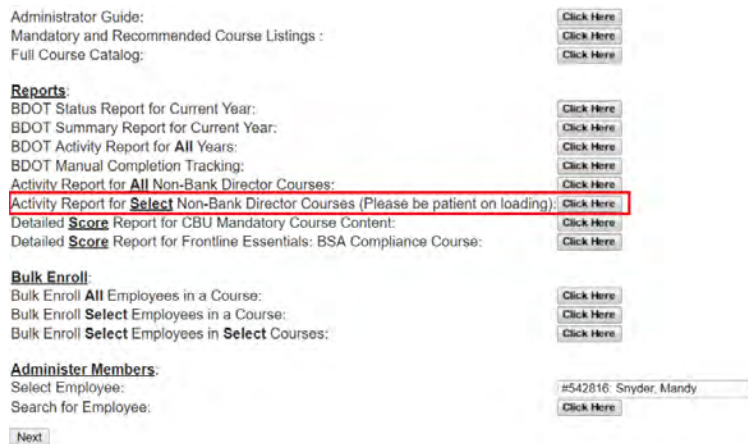
 **Individual Learner Report - All Enrollments**

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

## 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 Select Non-Bank Director Courses under the Reports section.



Administrator Guide: [Click Here](#)  
Mandatory and Recommended Course Listings : [Click Here](#)  
Full Course Catalog: [Click Here](#)

**Reports:**  
BDOT Status Report for Current Year: [Click Here](#)  
BDOT Summary Report for Current Year: [Click Here](#)  
BDOT Activity Report for **All** Years: [Click Here](#)  
BDOT Manual Completion Tracking: [Click Here](#)  
Activity Report for **All** Non-Bank Director Courses: [Click Here](#)  
Activity Report for **Select** Non-Bank Director Courses (Please be patient on loading): [Click Here](#)  
Detailed **Score** Report for CBU Mandatory Course Content: [Click Here](#)  
Detailed **Score** Report for Frontline Essentials: BSA Compliance Course: [Click Here](#)

**Bulk Enroll:**  
Bulk Enroll **All** Employees in a Course: [Click Here](#)  
Bulk Enroll **Select** Employees in a Course: [Click Here](#)  
Bulk Enroll **Select** Employees in **Select** Courses: [Click Here](#)

**Administer Members:**  
Select Employee: #542816 Snyder, Mandy  
Search for Employee: [Click Here](#)  
Next

*Note: The next screen will take some time to load. Please be patient. It will not look like anything is happening, but it is loading.*

3. 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 from. *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 get an entire history report.*
4. Select the course you will to get a report on from the dropdown list.
5. You may print the report as is or export the report to an Excel file by clicking on the Excel icon at the top.

### **Enrollment Status Report for Member Banks - Course Selection**

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

## Test Attempt Details

To know how many times it took a particular learner to pass the test on a particular course and the score they got 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

Member Name:	Snyder, Mandy
Enroll Employee in a Course(s):	<a href="#">Click Here</a>
Delete Enrollments for Not Completed Courses:	<a href="#">Click Here</a>
Member Report Card:	<a href="#">Click Here</a>
<b>Test Attempt Details:</b>	<a href="#">Click Here</a>

[Done](#) [Return](#) [Refresh](#)

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

### [Special Course Reports](#)

There are two other reports that can be used for specific courses within the Catalog:

- Detailed Score Report for CBU Mandatory Course Content – 12 different job functions
- Detailed Score Report for Bank Secrecy Act – Frontline & Deposit Operations – both the Frontline Essentials: BSA Compliance course (retired 10/1/18) and the Bank Secrecy Act – Frontline & Deposit Operations course.

These reports will show you the detailed scores and completion of each of the modules found within the main course.

## REPORTING for Custom Plan subscribers

Custom Plan subscribers have the same reporting options as the Standard Plan listed above. However, you have one extra option available to you called the Reporting Dashboard. It shows all employee activity with the ability to filter on student or course as well as export to CSV or PDF.

Administrator Guide: [Click Here](#)  
Mandatory and Recommended Course Listings : [Click Here](#)  
Full Course Catalog: [Click Here](#)  
Upload and Manage Policies: [Click Here](#)

**Reports:**  
BDOT Status Report for Current Year: [Click Here](#)  
BDOT Summary Report for Current Year: [Click Here](#)  
BDOT Activity Report for **All** Years: [Click Here](#)  
BDOT Manual Completion Tracking: [Click Here](#)  
Activity Report for **All** Non-Bank Director Courses: [Click Here](#)  
Activity Report for **Select** Non-Bank Director Courses (Please be patient on loading): [Click Here](#)  
Detailed **Score** Report for CBU Mandatory Course Content: [Click Here](#)  
Detailed **Score** Report for Frontline Essentials: BSA Compliance Course: [Click Here](#)  
**Reporting Dashboard:** [Click Here](#)

**Bulk Enroll:**  
Bulk Enroll **All** Employees in a Course: [Click Here](#)  
Bulk Enroll **Select** Employees in a Course: [Click Here](#)  
Bulk Enroll **Select** Employees in **Select** Courses: [Click Here](#)

**Administer Members:**  
Select Employee:   
Search for Employee: [Click Here](#)

[Next](#)

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:

**NOFILTER**  
CONTAINS  
STARTSWITH  
ENDSWITH

- 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.
- The report can be downloaded in PDF or CSV format by clicking the appropriate icon in the upper right.




## POLICY & PROCEDURE INTEGRATION for Custom Plan subscribers

If your bank has subscribed to the Custom Plan, you can add your bank specific policies/procedures to select courses.

For a detailed listing of the courses included, please visit our website <https://www.icba.org/education/online-training-center/bank-wide-online-training-full-library> and click on the link "View Available Courses to Insert Policies/Procedures" in the Custom Plan description.

From the Administration tab, select the Upload and Manage Policies link:

Administrator Guide:	<a href="#">Click Here</a>
Mandatory and Recommended Course Listings :	<a href="#">Click Here</a>
Full Course Catalog:	<a href="#">Click Here</a>
Upload and Manage Policies:	<a href="#">Click Here</a>

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 , 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.



Name	Lang	ID	Control
Balancing 101	EN	Balancing101.pdf	
Bank Secrecy Act: Customer Due Diligence and Beneficial Ownership	EN	BSA_CDD_BO.pdf	  
Bank Secrecy Act: In Depth	EN	BSAInDepth.pdf	
Bank Secrecy Act: Overview	EN	BSAOverview.pdf	  
Compliance for Tellers	EN	ComplianceTellers.pdf	
Compliance Issues for Commercial Lenders	EN	ComplianceCommLenders.pdf	  
Ethics for Bankers	EN	EthicsBankers.pdf	
Fair Lending (FHA, CRA, Reg B, HMDA)	EN	FairLending.pdf	  

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 you bank has more than one policy/procedure that it would like to include in the course, you must combine the documents into one PDF.