INDEPENDENT COMMUNITY BANKERS *of* AMERICA®

Bank Director Program : Director Management & Bank Director Online Training Guide

ICBA's online resources are accessible by creating and logging onto ICBA's website www.icba.org. Individuals can manage their own profile, but only Bank Director Program billing contacts, C-level or middle manager employees can edit the organization's profile and manage associated directors' profiles.

Table of Contents

DIRECTOR MANAGEMENT

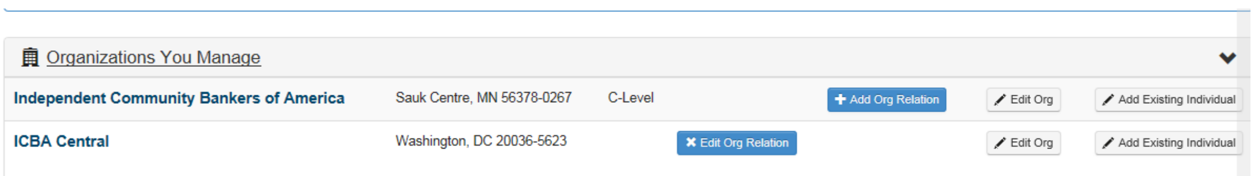
Managing Directors enrolled in the Bank Director Program

As an administrator for the Bank Director Program you are able to maintain your bank's directors online training.

To do this, follow these steps:

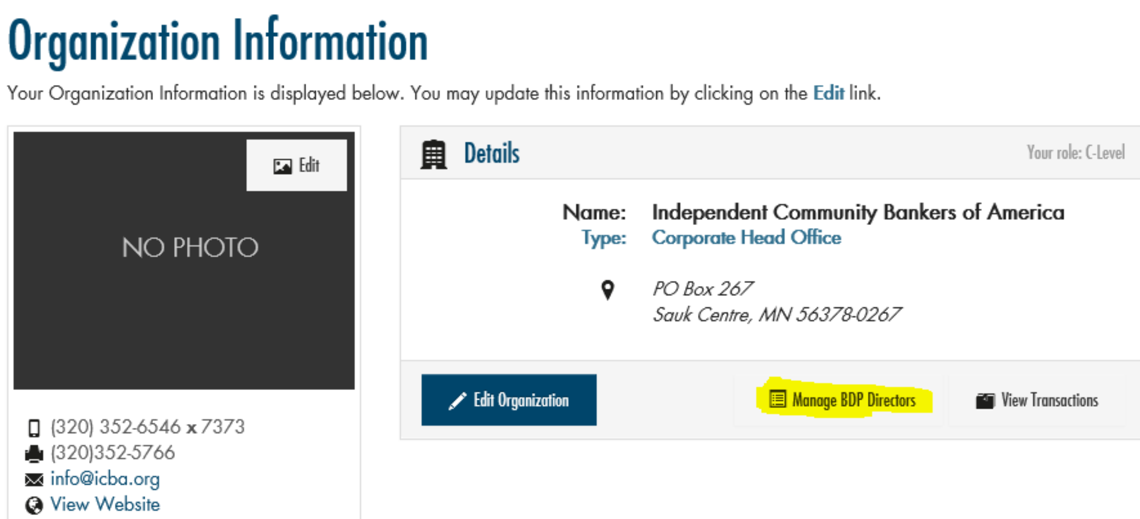
1. Login into www.icba.org and go to "My Account"

2. Scroll down to **Organizations You Manage** and select the bank's head office location to maintain the ICBA Bank Director Program participant list.



3. **To edit current director information or to add a new director to the ICBA system see instructions on page 3 and page 6.**

4. To enroll a director in the Bank Director Program (whom has an existing account with ICBA) or to change a director's newsletter delivery preference click **Manage BDP Directors**.

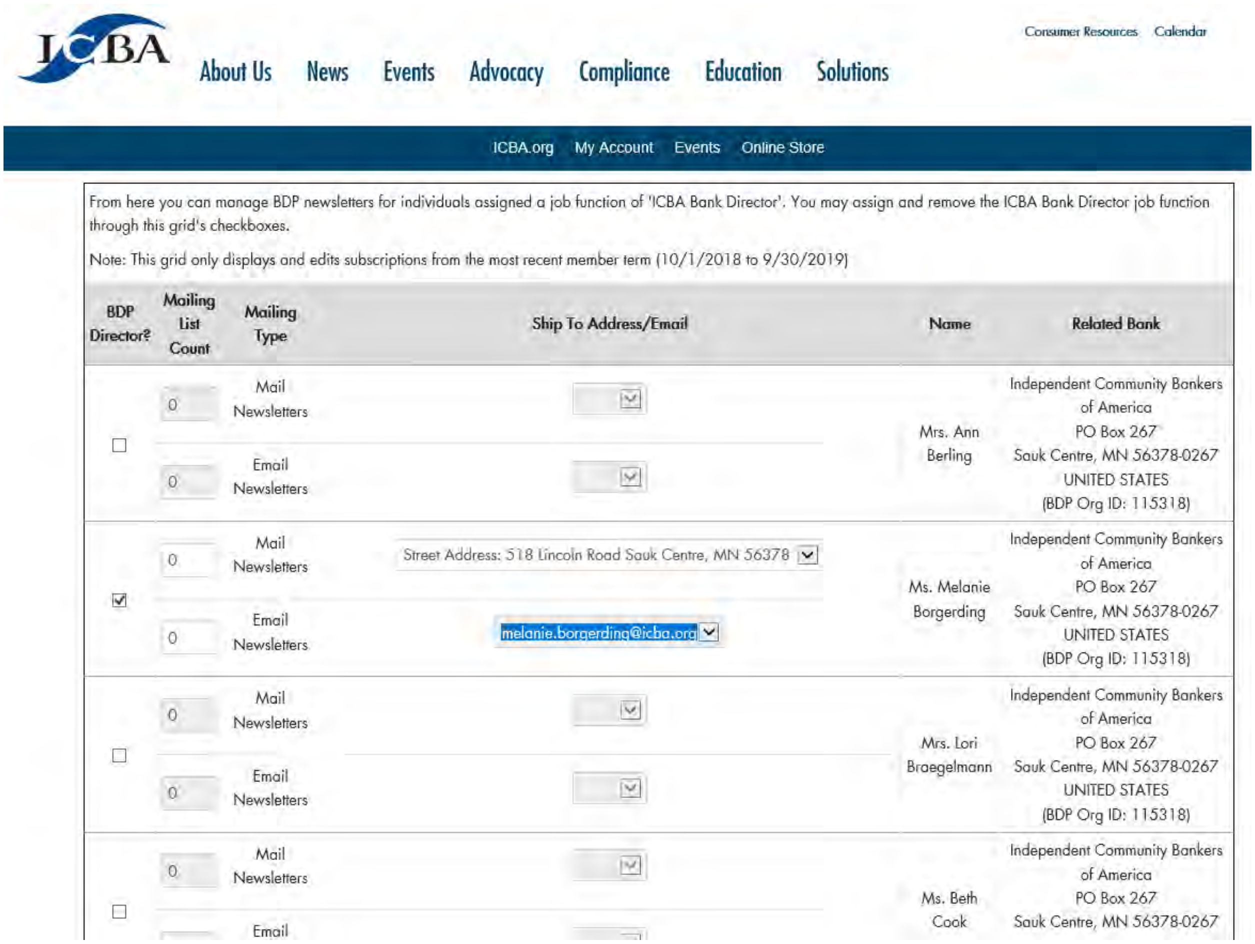


5. To Enroll a Director in the BDP check the box under the BDP Director Column for each individual that you would like to add into the program.

   - In the **Mailing List Count** column, enter a "1" next to the delivery preference (mail or email) for the Community Bank Director Newsletter.

6. If you wish to remove a director from the BDP, uncheck the box in the **BDP Director** column for the individual you would like to remove from the program.

    - If the director is no longer affiliated with the bank, make sure you remove the individual from the bank's **Organization Roster** (see page 8)



Employee/Director Roster Management

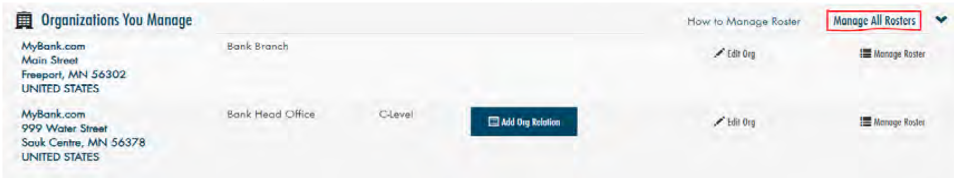
Before adding, editing or deleting an individual review your organization's current employee roster to determine if an individual profile already exists, and his/her location, among other details.

To export your roster, follow these steps:

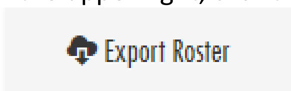
1. Visit www.icba.org and login on the upper right corner using your email and password.

2. Click on **My Account** in the upper right corner**.**

3. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters.**



4. In the upper right, click the **Export Roster** button.



5. Your organization's roster will export as an Excel document. Use this document to determine who is missing, needs to be edited, or removed.

If, at any time, you need to get back to your **Organization You Manage** or **My Profile** screen, click the **My Account** link in the blue bar under the ICBA navigator.

Add a New Employee/Director

There are two ways employees can be added to the roster:

1. Have the employee set up his or her own account using their issued email address (preferred).

2. An employee designated with a **Middle Manager or C-Level ICBA Relationship** in the system may also add the new employee to the organization's roster.

Option 1: Employee/Director created account:

1. Visit www.icba.org and login on the upper right corner using your email and password.

2. Click on **Create an Account** in the login box.

3. Enter your email address, a password, and click continue.

4. An email will be sent to the email address provided with instructions on completing the account setup. Two things to note regarding the email 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 email will come from info@icba.org. If you fail to receive an email, please check your spam or quarantine folder and ask your IT department to whitelist the following to ensure receipt of future ICBA emails:

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

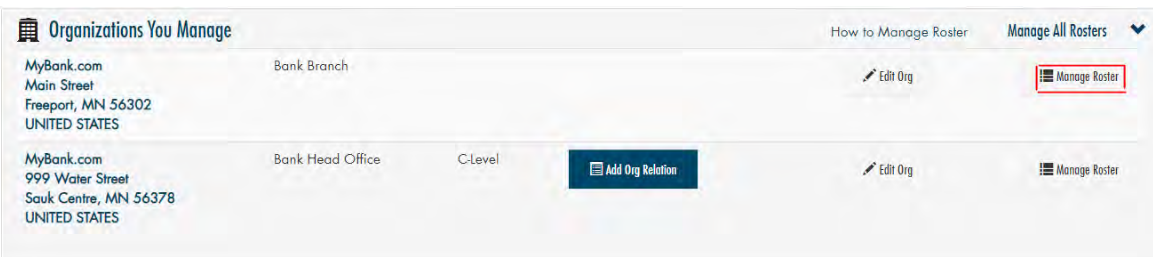
Note: Whitelisting ICBA's email domain will not affect your organization's email security or deactivate your spam filter.

Option 2: BDP Billing Contact/Middle Manager/C-Level Relationship created accounts:

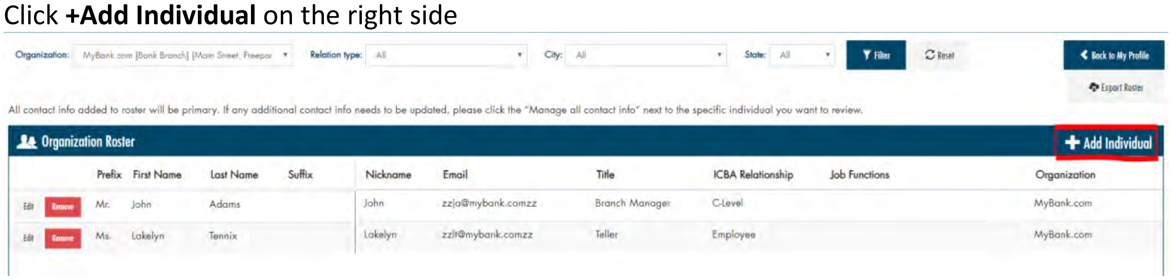
1. Visit www.icba.org and login on the upper right corner using your email and password.

2. Click on **My Account** in the upper right corner.

3. Scroll down to the **Organizations You Manage** box and click the **Manage Roster** button next to **Location** to designate where you want the new employee added. If you do not see an **Organization You Manage** box, contact ICBA at info@icba.org or 1-800-422-7285.



4. Click **+Add Individual** on the right side



5. 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. (See next section, **Know the Profile Fields** for more information). Enter data using mixed case (upper and lowercase letters) and standard capitalization rules.

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

7. If no duplicate or similar names are found, the new employee is added and is listed alphabetically by last name. **For employees without a unique email address, you will need to find the new employee and notate the system-generated email address to allow them to login to icba.org and access ICBA programs.**

8. If a potential duplicate account is found in the system when attempting to add an employee, the following screen will appear:

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.

i. If the **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 **Save**.

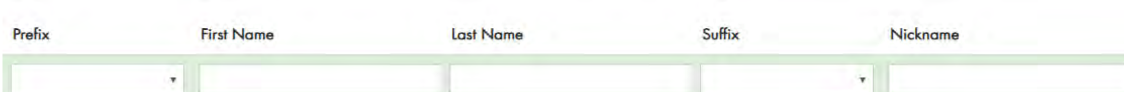
ii. If the **Organization** of a potential match appears and looks like the organization that your new employee worked at before, double check with the individual first, then click **Edit this Individual** and change the appropriate fields to match their current position at your organization. When you're finished click the **Save** button.

iii. If there is an exact match and all the displayed information is correct, then the employee you are attempting to add has already been set up. Click the **Cancel** button next to the new entry you started.

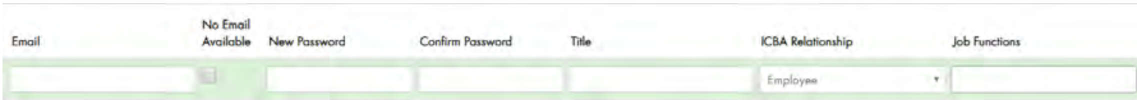
b. If there is not an exact account match in the **Accounts Found** box or you are uncertain if a potential match is a duplicate, click on **Click Here to Add the Individual Anyway** and he/she will be added to the roster. *Note: This can happen when an employee leaves the organization, is deleted, and later is rehired. Note: Removal from your organization does not remove employees from ICBA's database.*

Know the Profile Fields

When completing fields, please enter data using mixed case (upper and lowercase letters) and standard capitalization rules.



1. **Prefix** – Required field.
2. **First Name** – Required field.
3. **Last Name** – Required field.
4. **Suffix** – If applicable, not required.
5. **Nickname** – Required field.



6. **Email** – An email address is required for all new accounts as this is their "user name" for accessing www.icba.org. If the employee has a individual email, enter the email address. *Note: Everyone must have a unique email address.* If the employee does not have an legitimate email, leave the field blank and check the box **No Email Available.** A fictitious email address will be generated once the account is created (xxxxxx@commbanku.com). Share this computer-generated email address with the new employee to give them access.

7. **New Password** – You can choose to create a password for the new employee to get them started, but it is not a requirement. **If the employee does not have a legitimate email address you MUST create a password for them *if* they need to access the system.** Keep in mind:

    a. *Passwords are case sensitive – there are no length or character requirements.*

    b. If you *do* create a password for another employee, the employee will receive an email from info@icba.org stating their password has been changed. ICBA recommends employees change their password to something only they know once they've logged in. Provide the employee with the following instructions:

        i. Go to www.icba.org.

        ii. Click on **Member Login** in the upper right corner.

        iii. Enter your email and the password provided to you and click the **Login**.

        iv. Click on **My Account** in the upper right corner.

        v. 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.

        vi. Enter your new password twice and click **Save**.

        vii. You will receive an email from info@icba.org stating that your password has been changed (if you have a legitimate email address).

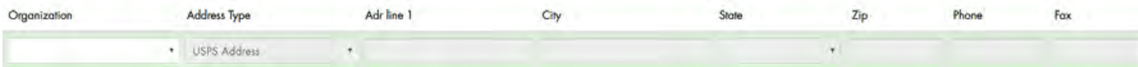
8. **Confirm Password** – If you entered a password in the **Password field**, re-enter it in this field.

9. **Title** – The job title is a required field.

10. **ICBA Relationship** –This fields determines the employee's permissions in editing the organization's roster and is required. Choose one of the following from the dropdown menu:

    a. *Employee* – Can manage his/her own account and no others.
    b. *Middle manager* – Can manage individuals only at his/her associated location.
    c. *C-Level* staff– Can manage individuals at any location or head office location as well as manage organization locations and demographics. LMS Administrators (Community Banker University's online training system administrators) must be C-level.

11. **Job Functions** – This field is used to capture an employee's role within the organization. You may start typing a job function and the available fields will appear from which to choose, or you can click in the field with your mouse and the entire list will appear for you to choose from. You may choose more than one job function by entering them individually or holding the **Control** (Ctrl) button on your keyboard while selecting from the dropdown menu.



12. **Organization** – From the dropdown list, select the location for which the new employee is associated. The address information will pre-fill once an **Organization** is selected.
If you are adding a new ICBA Bank Director or ICBA BDP Billing Contact to the Bank Director Program remember to go back to # 5 under Managing Directors Enrolled in the program to complete the program enrollment process.

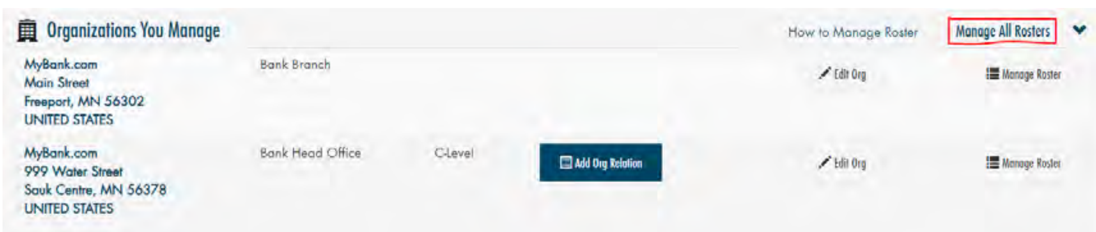
Removing an Employee/Director

Important note: Please do not remove employees unless they are no longer with the organization as they may be enrolled in other important ICBA programs. Also, 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.

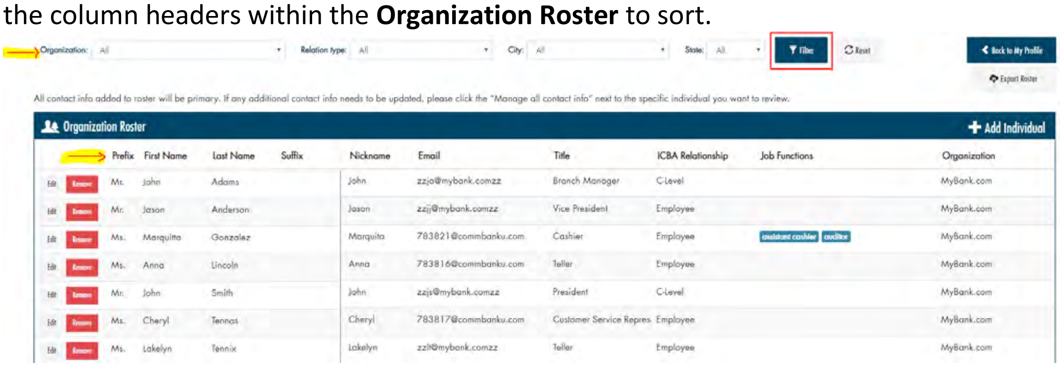
1. Visit www.icba.org and login on the upper right corner using your email and password.

2. Click on **My Account** in the upper right corner.

3. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters.**



4. 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 the pages until you find the individual (listed by last name in 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.



5. When you find the employee, click the **Remove** button.

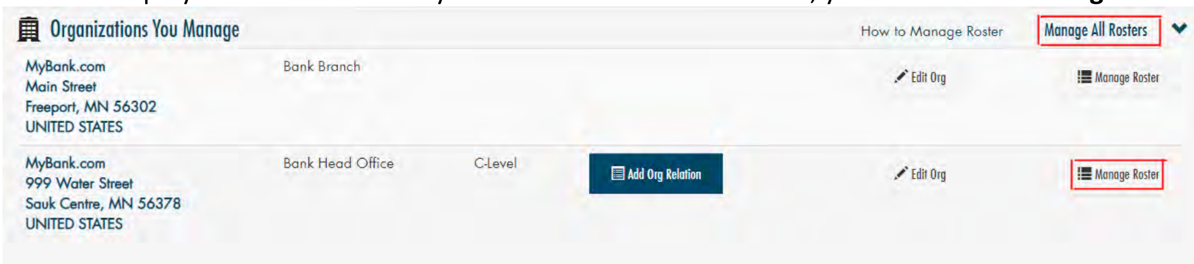
6. A confirmation box will appear to ensure you want to remove this employee. Click **Yes, remove employee** or **No.**

Editing an Employee/Director Account

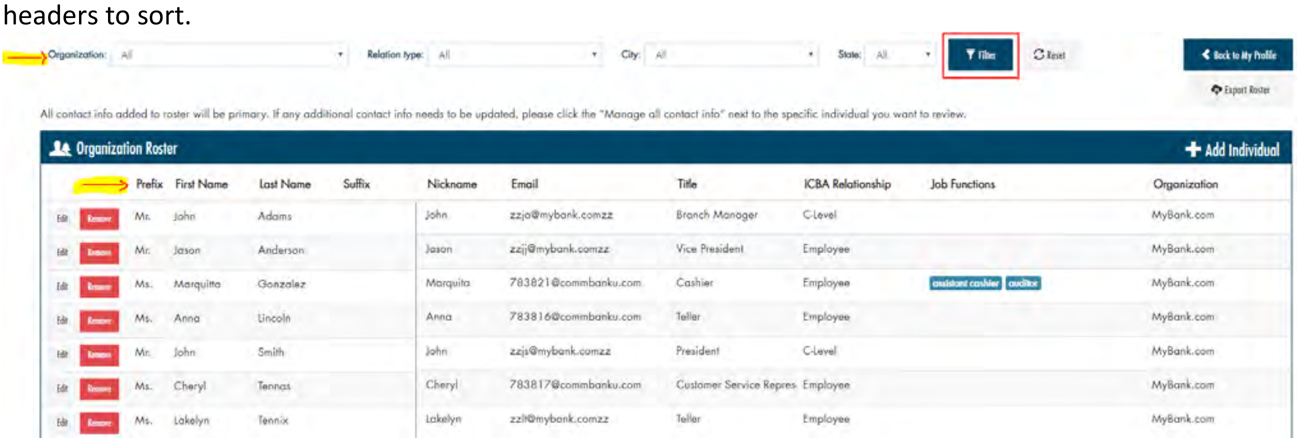
1. Visit www.icba.org and login on the upper right corner using your email and password.

2. Click on **My Account** in the upper right corner.

3. 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.**



4. 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 by last name in alphabetical order). You can choose from any of the dropdowns at the top of the screen and click **Filter**or you can click on any of the table column headers to sort.



5. Once you find the employee you can either:

   a. Option 1: Click the **Edit** button on the left if you want to edit the following:
      i. Name
      ii. Email address
      iii. Reset password
      iv. Title
      v. ICBA Relationship
      vi. Job function
      vii. Organization/Location

   b. Option 2: Click the **Manage all contact info** button found by scrolling all the way to the right, if you want to add or edit the individuals contact information such as:
      i. Phone
      ii. Fax
      iii. Additional individual address
      iv. Additional email addresses

6. Edit all applicable fields.

7. Once all changes are complete, click the **Save** or **Close** button depending on what screen you are editing.

Reset Password

There are three ways to reset a forgotten login password.

Option 1: Employees/Director Reset Their Own Password – *Preferred*

Employees can reset their own system password if they have a legitimate email address. Have the employee follow these instructions:

1. Go to www.icba.org

2. Click on **Member Login** in the upper right.

3. Click on the **Forgot your password?** Link.

4. Enter your email address and click **Submit**.

5. An email 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.***

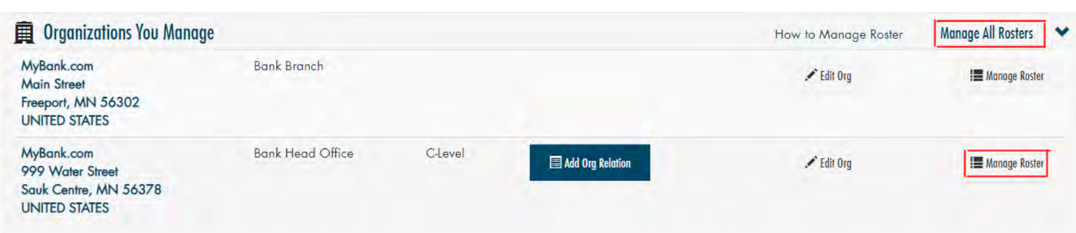
   The email will come from info@icba.org. Please check your spam or quarantine folder if it is not delivered to your inbox and ask your IT department to whitelist the following to receive emails:
   - IP addresses (205.201.42.27 and 205.201.40.208),
   - domain icba.org,
   - main email address info@icba.org

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

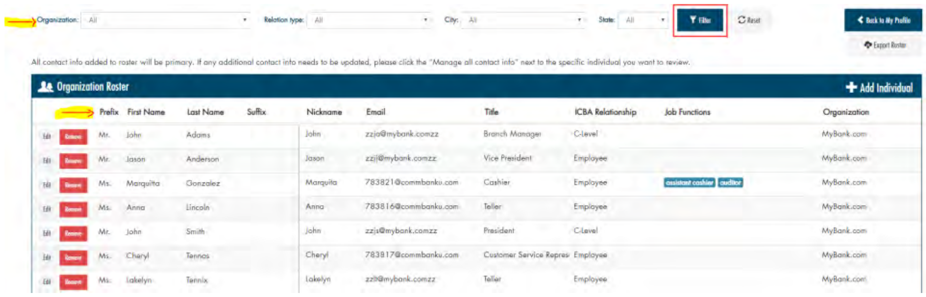
Option 2: BDP Billing Contact/Middle Managers or C-Level staff Reset Employee's Password

An employee with a Middle Manager or C-Level "ICBA Relationship" status can reset an employee's password within the ICBA website by following these instructions:

1. Visit www.icba.org and login on the upper right corner using your email and password.
2. Click on **My Account** in the upper right corner.
3. Scroll down to the **Organizations You Manage** box. You may click on **Manage Roster** next to the specific branch where the employee is located. If you are unsure of the location, you can click on **Manage All Rosters**.



4. 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 by last name in 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.



5. Once you find the employee, click the **Edit** button on the left side of the screen next to the individual.

6. Tab or scroll and click to the **New Password** field.

7. Enter a new password and enter it again in the **Confirm Password** field.

8. Click the **Save** button on the left side.

9. If the employee has a legitimate email address, an email will be sent to the employee from info@icba.org stating their password has been changed.

Please Note: Employees 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 employees with the following instructions:

1. Go to www.icba.org and click on **Member Login** in the upper right corner.

2. Enter your email and the password provided to you and click the **Login** button.

3. Click on **My Account** in the upper right corner.

4. 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.

5. Enter your new password twice and click the **Save** button.

6. You will receive an email from info@icba.org stating that your password has been changed (if you have a legitimate email address).

Employees without a legitimate email address, may change their email address this same way. However, they cannot reset their password on their own if they have forgotten it.

Option 3: ICBA Team Members Reset Password

You can contact an ICBA team member at info@icba.org or 1-800-422-7285 to have the password reset. If ICBA resets a user's password, the employee will receive an email notifying them that his/her password has been reset (if a legitimate email is on file).

ONLINE TRAINING TECHNICAL REQUIREMENTS & ADMINISTRATION

Technical Assistance

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) VPN's should not be used when accessing icbalearning.org.

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, 443, 1935, 1936 (in some cases corporate networks do not open ports 1935 & 1936)

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 our courses contain streaming video.	• 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.
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+ • Internet Explorer, version 11+*	• Chrome 44 or higher
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 Internet Explorer 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.

***Internet Explorer:** While the system will run on Internet Explorer, it is recommended you try to avoid using this browser if possible as it is no longer being updated or supported. Also, if you're using Internet Explorer you must also do the following:

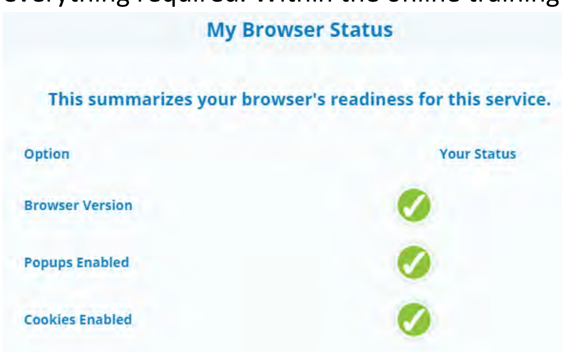
- Make sure "Enable Protected Mode" is unchecked for Trusted Sites only
- Disable Compatibility View for *.icbalearning.org, *.vubiz.com and *.vubizlearning.com (or any custom URL your site is running with)

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

Trouble 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.

Administration

As an Administrator of the Bank Director Online Training (BDOT), you can enroll directors into courses, delete directors from courses, mark courses complete, and run status reports. The following instructions will walk you through these various options. All of these options can be found in the Administration Tab once you are logged into the Online Training Center.

Note: Depending on the type of online access you have based on your job function within ICBA and/or the subscriptions the bank has, the Administration screen may vary. For those banks with BDP Membership ONLY and no other online training subscription or you are the ICBA BDP Contact, you will see the following screen:

BDOT Status Report:	Click Here
BDOT Summary Report:	Click Here
BDOT Activity Report for **All** Years:	Click Here
BDOT Manual Course Enrollment:	Click Here
BDOT Manual Completion Tracking:	Click Here

Next

For those with BDP Membership and a subscription to an Online Training Plan or Bundle and are an LMS Administrator, the Administration screen below will appear. The only functions you will use as a BDOT Administrator are the 5 BDOT options highlighted below. All of the other functions are used for banks who subscribe to one of our other Online Training Plans. Currently, the Administrator Guide is not found online. When this guide is updated, a CBU Team Member will e-mail you an updated version.

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 Course Enrollment:	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 Bank Secrecy Act – Frontline and Deposit Operations 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:	#395900: Alex M
Search for Employee:	Click Here

Next

Course Enrollment

There are two ways a director can be enrolled in a BDOT course:

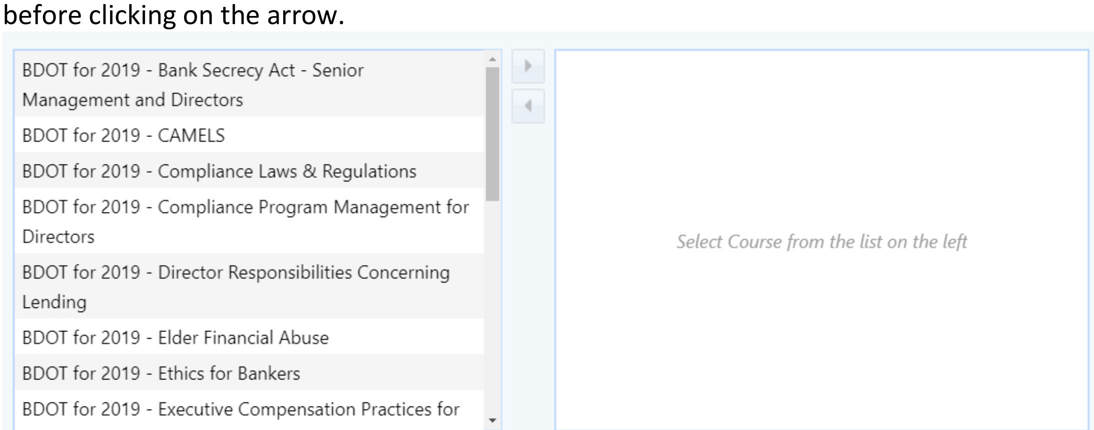
1. Administrators can enroll directors in select courses
2. Directors can enroll themselves in select courses

Option 1: Administrator Enrollment

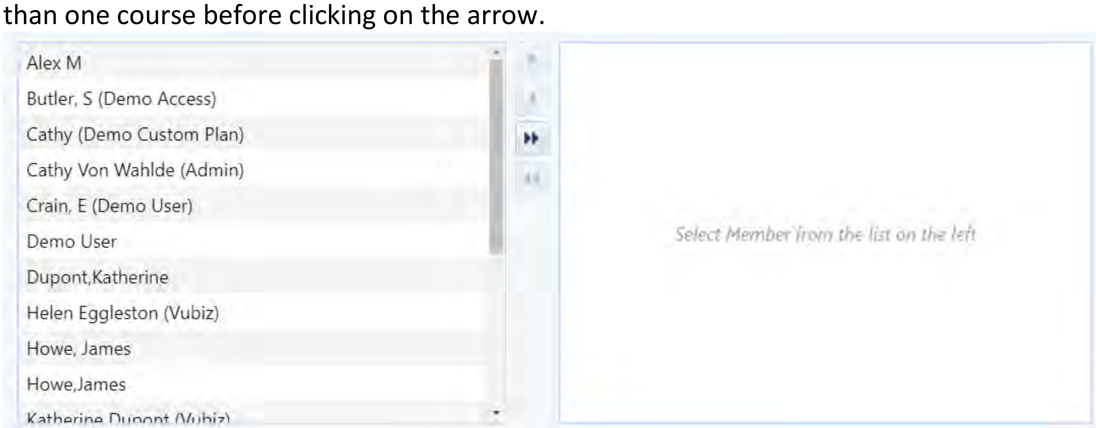
A BDOT Administrator can enroll bank directors in BDOT courses by following these steps:

1. "Click Here" next to **BDOT Manual Course Enrollment**

2. 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 directors in or press and hold the Ctrl Key to select more than one course before clicking on the arrow.



3. Double click the desired directors OR click and highlight the desired director and click the single arrow to move the director from the available director's window on the left to the enrollment list window on the right. Do this for each director you would like to enroll in the specific courses or press and hold the Ctrl Key to select more than one course before clicking on the arrow.



4. Review that you have all courses and all directors 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”.

5. Click the **Enroll in Course** button.

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

Option 2: Director Enrolls Self

A bank director can enroll themselves in BDOT course. If your bank chooses this option, you can provide the directors with the following instructions:

1. Log into the Online Training Center at https://www.icbalearning.org/icbasso/index.aspx using the e-mail address and password for your ICBA Account. If you are unsure of what your login information is, please contact the banks online training administrator or an ICBA Community Banker University Team Member at 800-422-7285.

2. Once logged in, click on the **Bank Director Training Tab** on the left.

3. Click the **Enroll** link on the right side next to the course you wish to take.

4. Click the **link shown** on the screen or click on the **Current Enrollment Tab** on the left.

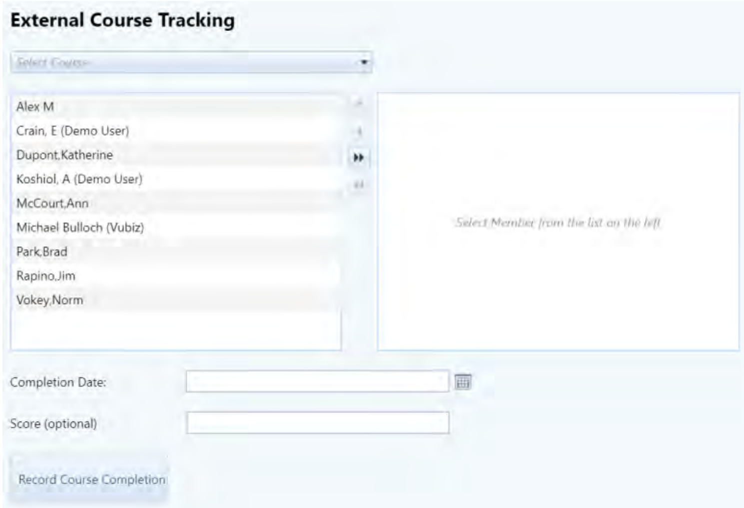
5. Click the Blue Play Icon to launch the course.

6. When the course is complete, the title will move from your Current Enrollments tab to the Completed Courses tab.

Completion Tracking

Often times, banks will choose to take a specific BDOT course as a group during a regularly scheduled Director Meeting. In order for the system to track that each director “completed” the training, the BDOT Administrator can manually mark the course as completed in the system for each director. To do this, complete the following instructions:

1. “Click Here” next to **BDOT Manual Completion Tracking**



2. Select the course title using the **Select Course** drop down.

3. Double click the desired directors OR click and highlight the desired director and click the single arrow to move the director from the available director's window on the left to the enrollment list window on the right. Do this for each director you would like to enroll in the specific courses or press and hold the Ctrl Key to select more than one course before clicking on the arrow.

4. Enter the date the course was complete.

5. Score (optional): Leave this field blank and BDOT no longer requires testing.

6. Click the **Record Course Completion** button.

The various activity reports will now show that the course was completed without each director having to actually complete the course on their own with their own login.

Reports

The courses contained in the BDOT change every January 1. There are three different types of activity reports a BDOT Administrator can get from the system:

1. Status Report for Current Year
2. Summary Report for Current Year
3. Activity Report for All Years

Status Report for Current Year

By clicking on "Click Here" next to **BDOT Status Report for Current Year** you will see a listing of all of the courses that bank directors are currently enrolled in for the year and whether or not the particular course listed is Completed Satisfactorily or Not Completed. This report can be exported into an Excel file by clicking on the Microsoft Excel icon.

BDOT Status Report for Member Banks - Current Year

Summary Report for Current Year

By clicking on “Click Here” next to **BDOT Summary Report for Current Year** you will see a listing of directors that are currently enrolled in courses and of the 20 BDOT courses, what percentage they have completed. This report can be exported into an Excel file by clicking on the Microsoft Excel icon.

BDOT Summary Report for Member Banks - Current Year

Activity Report for All Years

This report allows you to pull an activity reports for the current year as well as past years of course enrollments. When you “Click Here” next to **BDOT Activity Report for All Years** you will enter a start and end date. The dates entered must be in the YYYY-MM-DD format and are based on the date the directors were enrolled in the course. Once the dates are entered, click Next. This report can be exported into an Excel file by clicking on the Microsoft Excel icon.

BDOT Enrollment Status Report for Member Banks - All Years