ICBA Bank Director Program
Roster Management and
Bank Director Online Training (BDOT) Course
Administration Guide

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BEFORE YOU GET STARTED – Director/Employee Roster

Program Management Special Note

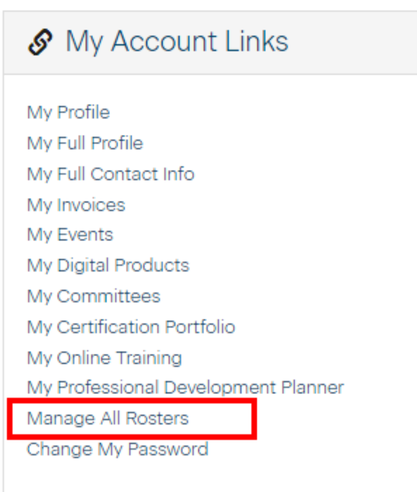
You must have administrative permissions on your ICBA account to manage the Bank Director program. These permissions can only be set by ICBA staff. We call these permissions the **ICBA BDP Billing Contact or BDP Administrator.** Reach out to education@icba.org or call 1-800-422-7285 for assistance if you have any questions.

Before adding, editing, or deleting an individual account, review your organization's current director/employee roster to determine if an individual profile already exists, and his/her location, among other details. Do this from the "**Manage All Rosters**" link on our website as this will provide a complete list of all your employees/directors with ICBA accounts regardless of their organization location with your bank. It is VERY important that you do not create a duplicate account in our system. See the Exporting Roster with ICBA section below for directions on how to do this.

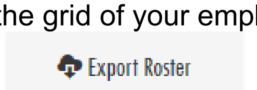
Exporting Roster with ICBA

To export your roster, follow these steps:

1. Go to 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 the **My Account** link in the upper right corner.
5. Scroll down to the **Organizations You Manage** box and click **Manage All Rosters**. Or click the **Manage All Rosters** link found towards the top of the page in the My Account Links box.

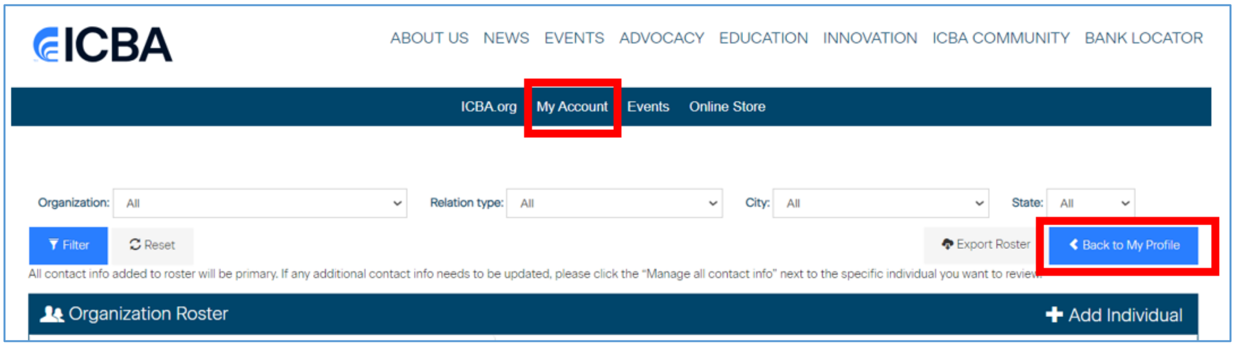


6. In the upper right, click the **Export Roster** button. (this is on the right side of the screen above the grid of your employees)



7. Your bank's roster will be exported to an Excel document to your downloads folder. Use this document to work from to determine who is missing, needs to be edited, or removed from your roster. You will make these changes on our website, <u>not</u> within the excel document.

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, or if on the roster management grid there is a button named “**Back to My Profile**.”



DIRECTORS ACCOUNTS / ROSTER MANAGEMENT

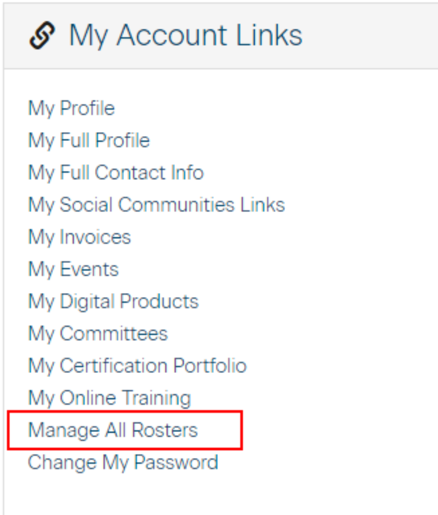
Adding a New Director

There are two ways in which a new director can be added to the system. An employee with Administrator permissions can add the new director to the bank’s roster OR the director may set up their own account (if they have a legitimate bank e-mail address) which will connect them to the bank. ***Our recommended Best Practices method is for an Administrator from your bank to create accounts for your directors.***

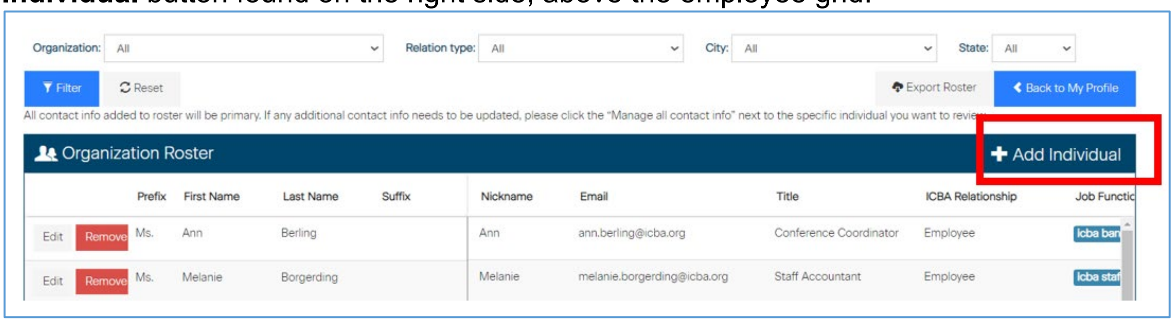
Option 1: Bank Administrator Creating New Account

1. Go to www.icba.org.
2. Click on **Member Login** in the upper right corner.
3. Enter your e-mail and password for your existing ICBA Account.
4. Click on the **My Account** link in the upper right corner.
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 on the lower portion of this page. This button is towards the right side of the screen and takes you to the same grid containing all of your employees as

if you click the “**Manage All Rosters**” link in the My Account Links box at the top.

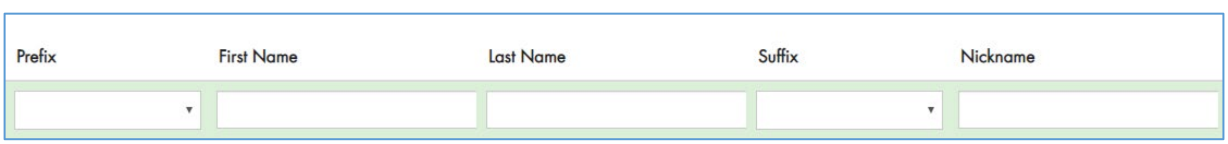


6. If you have verified your Director does NOT already have an account, you will click the **+Add Individual** button found on the right side, above the employee grid.



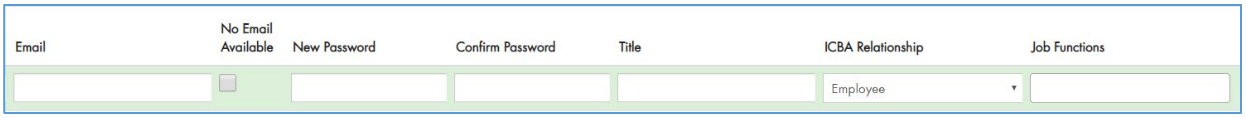
7. Complete each of the fields on the newly inserted blank row at the top of the employee roster grid. You may use the tab button to move from field to field or use your mouse to click into each field. If using your mouse, you must scroll to the right to view the additional fields. There are horizontal and vertical scroll bars for this grid, separate from the page scroll bars.

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



<u>Field Definitions</u>

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



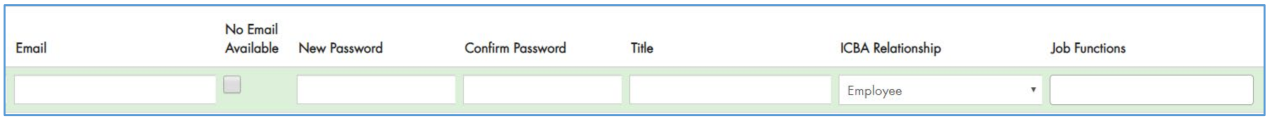
f. **Email** – An e-mail address is required for all new accounts as this is their "username" to access the system. If the director has a legitimate bank e-mail, enter their e-mail address. You may use personal emails for your directors too with this method of creating an account. *Note: duplicate e-mail addresses may NOT be used. Everyone must have their own unique e-mail address.*
If the director does not have a legitimate bank e-mail or personal email address, leave the e-mail field blank and then you must **check the box** "**No Email Available**". A fictitious e-mail address will be generated for this director once their account is created (It will look like this where the x's are a unique set of numbers, xxxxxx@commbanku.com).

g. **New Password** – We recommend you choose an initial password for them when creating your directors accounts. You can then instruct them how to change it to something else after they have successfully logged in. **If the director 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 director, they must follow the Password Reset instructions in the Password Reset section of this Guide.
   ii. If you *do* create a password for another director, the director 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 director 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 their initial password, then enter their new password twice in the subsequent two boxes and click the **Save** button.
      - They will receive an e-mail from info@icba.org stating that their 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 password this same way. They just cannot reset their password on their own if they have forgotten it because the xxxxxx@commbanku.com is not a valid email address to have access to.

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

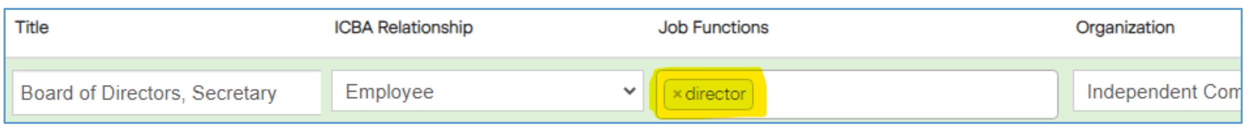
h. **Confirm Password** – If you entered a password in the Password field, you must re-enter the same password in this Confirm Password field.



i. **Title** – Required field.

j. **ICBA Relationship** – Required field. This field determines what the director/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. – **this is the default value and what you will use on most accounts you create**.
   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 and organization locations and demographics.* LMS Administrators must be C-level.

k. **Job Functions** – This field is used to capture a director/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 are adding directors, select the "Director" job function.
If you are adding an employee to also access the Bank Director features, note the employee's job role and do NOT select the Director job function**.**

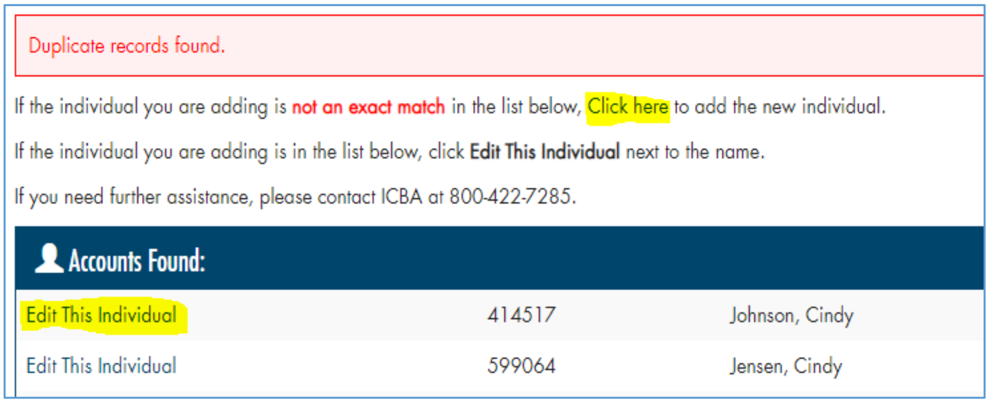


l. **Organization** – Select the location from the dropdown list that you want this new employee to be connected to. The address information will pre-fill once an Organization location is selected. For Bank Directors, you must select your Head Office bank location.

8. When all fields are complete, click the **Save** button on the far-left side of the screen for this row.

9. If no duplicate or similar names are found in the system, the new director 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 in this employee grid and notate the system-generated e-mail address (example xxxxxx@commbanku.com).**

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



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 Individual of a potential match appears and **IS** the same as your Individual but the person is at a different Organization or location of your organization, double check with the individual field, then click **Edit This Individual** and change their Organization (location) and 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 Founds" 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 they return to the bank to work. Even though they were removed from your bank, they are not removed from the ICBA system. No account is ever deleted in our system. We will want to find any prior account and update it instead of creating duplicate accounts.

11. Once the new account is created for your director, proceed to the section in this document allowing them access to the Bank Director Program benefits – see section for Manage Directors Enrolled in Program.

Option 2: Director Creating their Own Account

***We recommend best practice is to have one of your Admins create the accounts, however they can follow the steps below to create their own. If you have your director(s) create their own account, you will still have to edit their account(s) to designate them as Directors who should have access to the Bank Director Program membership benefits.* **

1. Director will navigate to www.icba.org from their device
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**. This email address must be a bank email supplied address.
   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, select an organization from the dropdown list of existing organizations. If you do not see your bank listed, do not create a new one – reach out to support instead or ask the Administrator to create your account. You must find the correct bank to link up and receive the Bank Director benefits. They must select the location that is your Head Office.*
   b. ***The link in the email sent 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 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.

Removing a Director/Employee

There are three important things to note prior to removing a Director/Employee from your bank's roster.

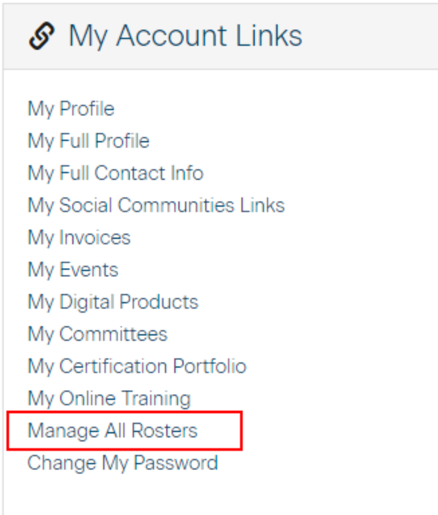
1. Please do not remove directors/employees unless they are no longer with the organization, as they may be enrolled in other important ICBA programs.
2. If an employee changes bank locations/branch, **do not remove the employee**, but edit their profile. See Editing an Employees Account instructions on the next page.
3. Before removing an employee from the bank's roster, if you have online training subscriptions with ICBA, you must pull an Activity Report from the LMS because removing an employee from your bank's roster also removes them ***and their training history*** from the LMS.
4. You are NEVER deleting an account in the ICBA system, you are just removing them from your bank's list of directors/employees. There is not a delete and start over option if something is not working for an account. Reach out to an ICBA Education team member for assistance to resolve account issues. If you remove and create a new account, you have created a duplicate account for this individual and nothing will work for them. You need to contact ICBA Support.

   For assistance contact education@icba.org or call 1-800-422-7285.

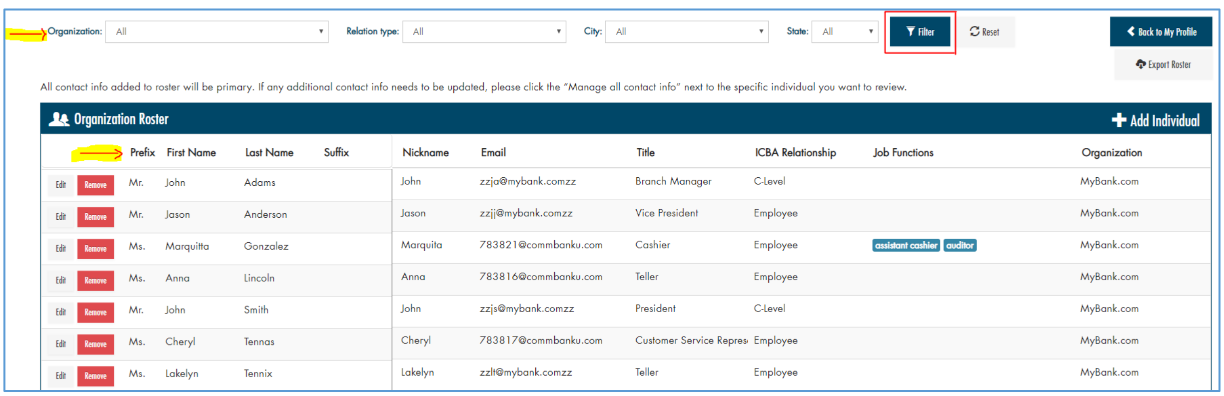
After following the important steps above, proceed with the following steps to remove an employee:

1. An Administrator will go to 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. 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 showing all your employees.



6. From this screen you can filter and sort the report in several ways to find the director/employee you want to remove or simply click through each page until you find the individual. (The default sorting is last name first 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.



		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

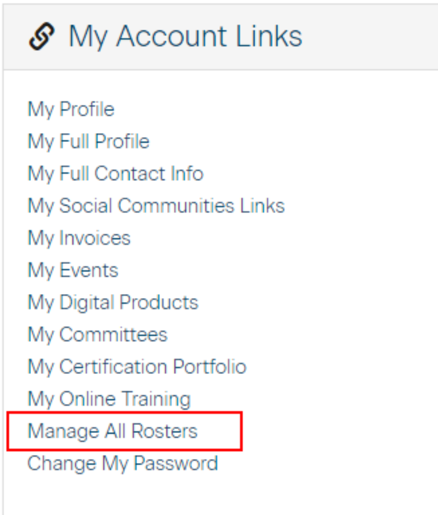
7. When you find the director/employee, click the **Remove** button to the left of their name.
8. A confirmation box will appear to ensure you want to remove this account from your roster. Click
Yes, remove employee or **No**.

NOTE: The Removal of a director/employee does not occur immediately within the LMS if you use any of our Online Training education subscriptions. The director/employee will be removed during the LMS weekly update process that occurs each Friday evening.

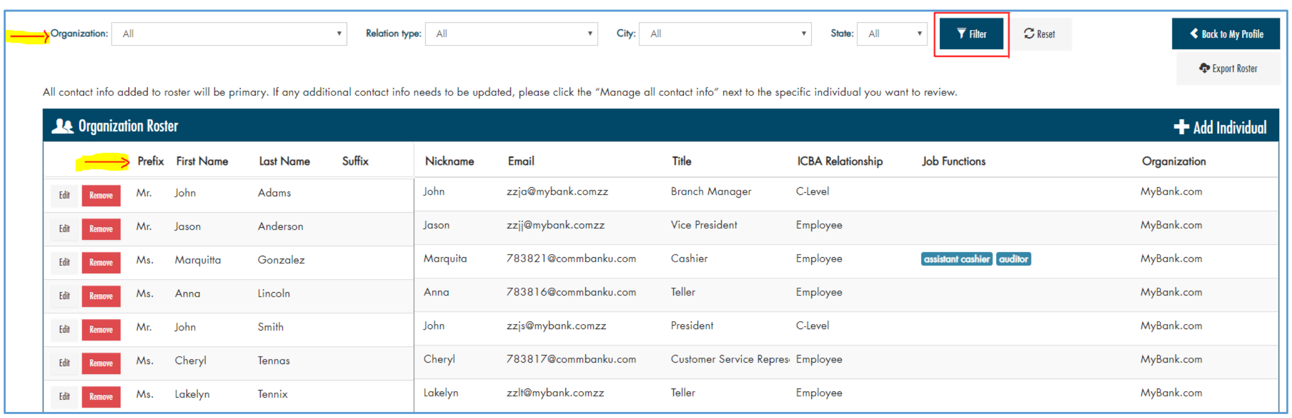
Editing a Director's Account

1. An Administrator will go to 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. 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 on the lower portion of this page. This button is towards the right side of the screen and takes you to the same grid containing all of your employees as if you click the "Manage All Rosters" link in the My Account Links box at the top.



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 by default). 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 the roster records.



	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 the director/employee you will proceed with 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 (Reminder Directors must be at the Head Office location)

        iv. Title
        v. ICBA Relationship
        vi. Job Function (Directors should have a job function of “Director” but can also have others)

    b. Click the **Manage all contact info** button found by scrolling all the way to the right of that director/employees record, 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 depending which item(s) you are editing.

Password Resets

There are 3 ways in which a director/employee’s password may be reset if they have forgotten it.

Director Resets Their Own Password

A director/employee may reset their own password to the system if they have a legitimate e-mail address. Have the director/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 the e-mail address associated with the account in our system 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 to receive emails. Whitelisting ICBA’s email domain does not affect your bank’s email security or deactivate your spam filter.

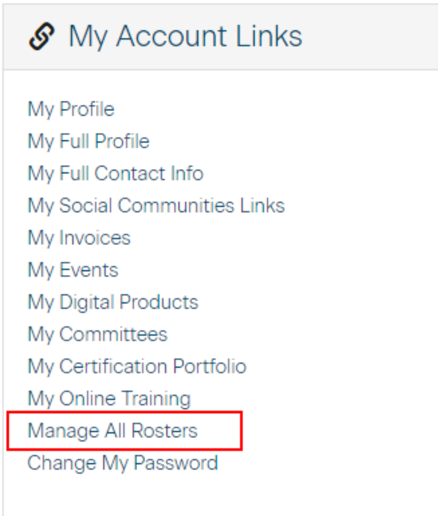
- IP addresses (205.201.42.27 and 205.201.40.208),
- domain icba.org, and
- main email address info@icba.org

Bank Admin Resets Director’s Password

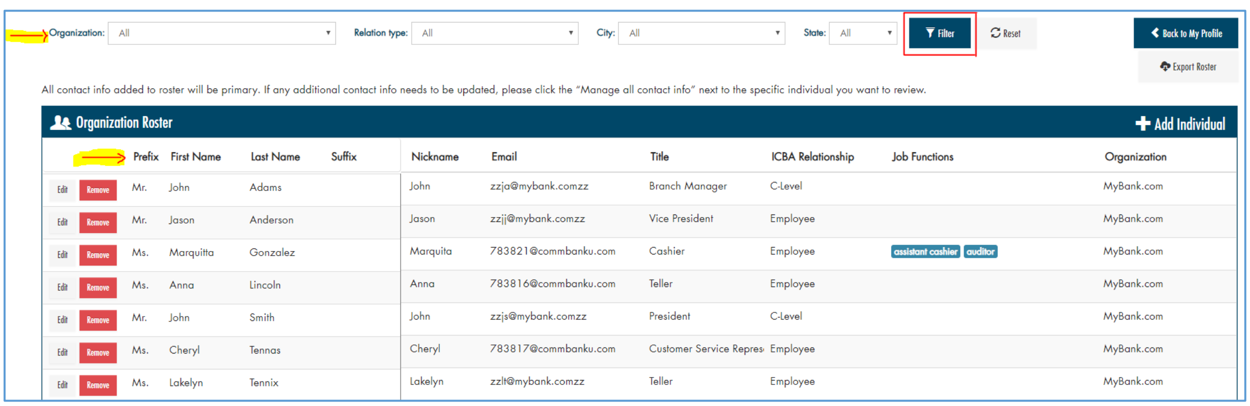
An employee from the bank designated with the needed authority may also reset a password. Any individual from your organization who is set up as C-Level in our system can reset a director/employee’s password for your organization within the ICBA website. Follow these instructions:

1. An Administrator will go to 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. 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 on the lower portion of this page. This button is towards the right side of the screen and takes you to the same grid containing all your employees as if you click the "Manage All Rosters" link in the My Account Links box at the top.



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



		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 the director/employee, click the **Edit** button on the left side of the screen next to the individual.
8. Tab or scroll and click to type in a value 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 of this row you are editing.
11. The director/employee will receive an e-mail from info@icba.org stating that their password has been changed.

The director/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 they only know once they have logged in.

Provide the director/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).

Directors/Employees who do not have a legitimate email address may change their password this same way. They just cannot reset their password on their own if they have forgotten it as they cannot access the email it would be sent to (example if have a 11111@commbanku.com email).

ICBA Education Team Member Resets Password

You can contact an ICBA Education team member at education@icba.org
or call 1-800-422-7285 for assistance to help reset a director's password.

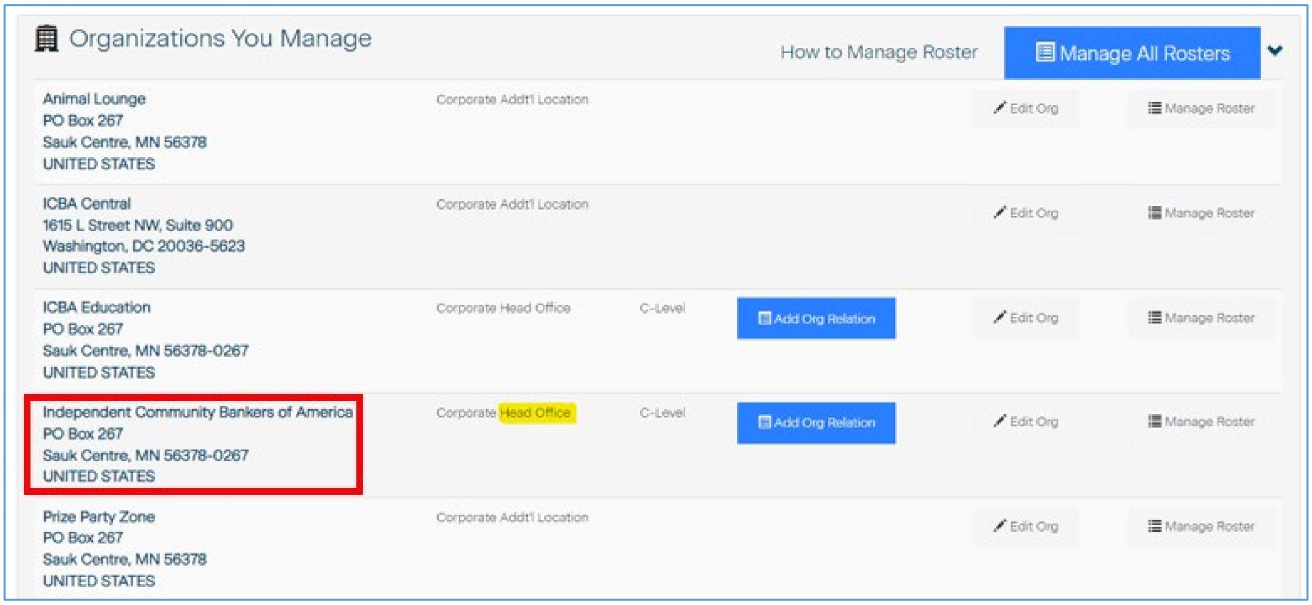
If an ICBA Education team member resets a user's password, they will receive an e-mail that their password has been reset (if a legitimate e-mail is on file).

MANAGING DIRECTORS ENROLLED IN PROGRAM

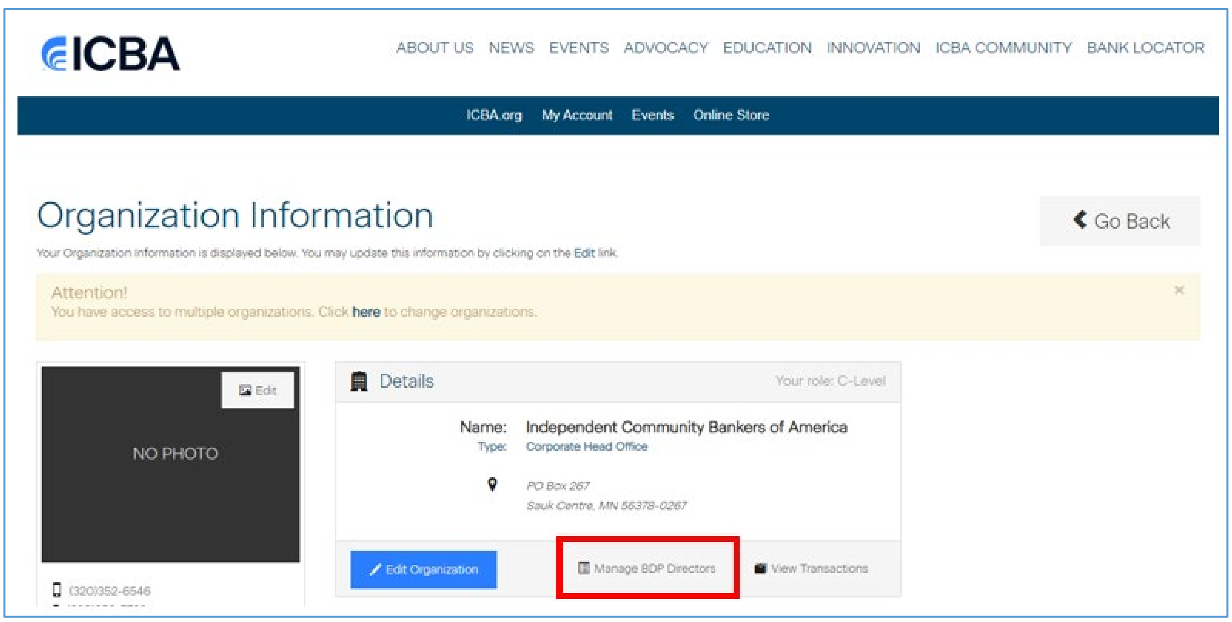
Add Bank Director Access to an Account

Follow the steps below **after** an account has been successfully created for your director/employee to allow them access to the Bank Director Program benefits (for example access to online courses).

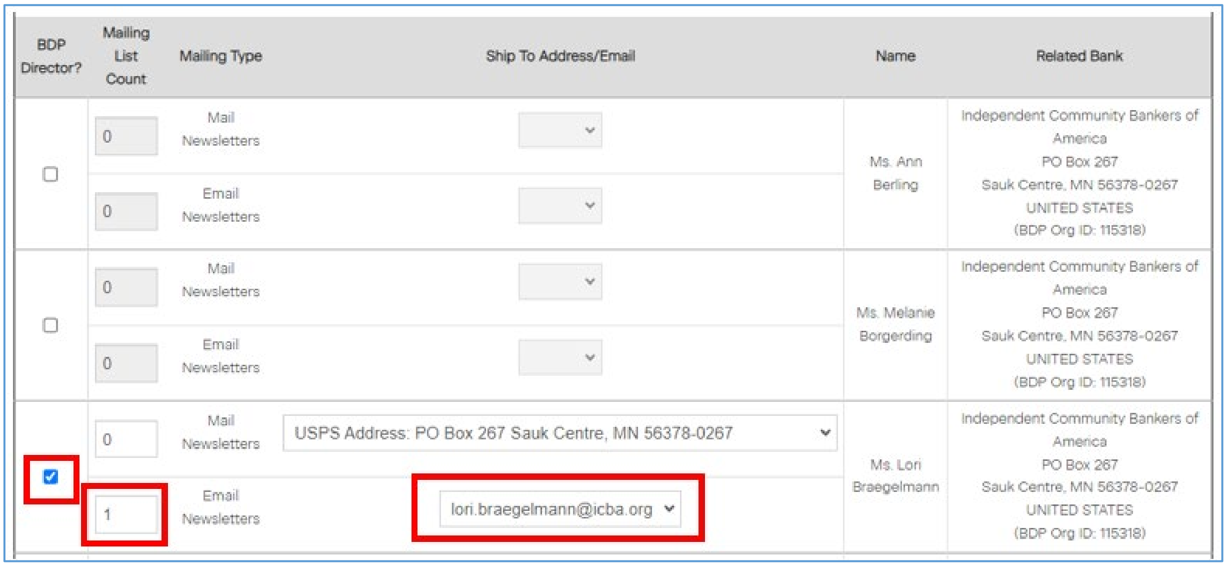
1. An Administrator will go to www.icba.org.
2. Click on **Member Login** in the upper right.
3. Enter your e-mail and password for your ICBA account.
4. Click on **My Account** in the upper right corner.
5. Scroll down and click until you reach the section of the page for **Organizations You Manage**. If you have multiple locations, all your organization locations will be listed on the left side of the page. Locate the location labeled as your "Head Office," click on the organization name/address for this head office location, as demonstrated in the red box below.

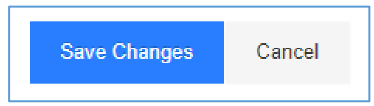


6. From the Organization Information Page (for your head office location) – Click the "**Manage BDP Directors**" link



7. To enroll a director in the Bank Director Program, locate the director in the list of directors/employees (you may have to use the paging control at the bottom to get to subsequent pages), check the box under the BDP Director column (1st column).
8. In the Mailing List Count Column, enter a "1" in the box for delivery preference (Mail Newsletters or Email Newsletters) for the Community Bank Director Newsletter. The other box that is not the preferred method will contain a "0".
9. Select a value in the Address drop down box to the right for the chosen delivery preference.
10. Scroll to the bottom of the page to click the "SAVE" button when finished adding Bank Director access to the account(s).

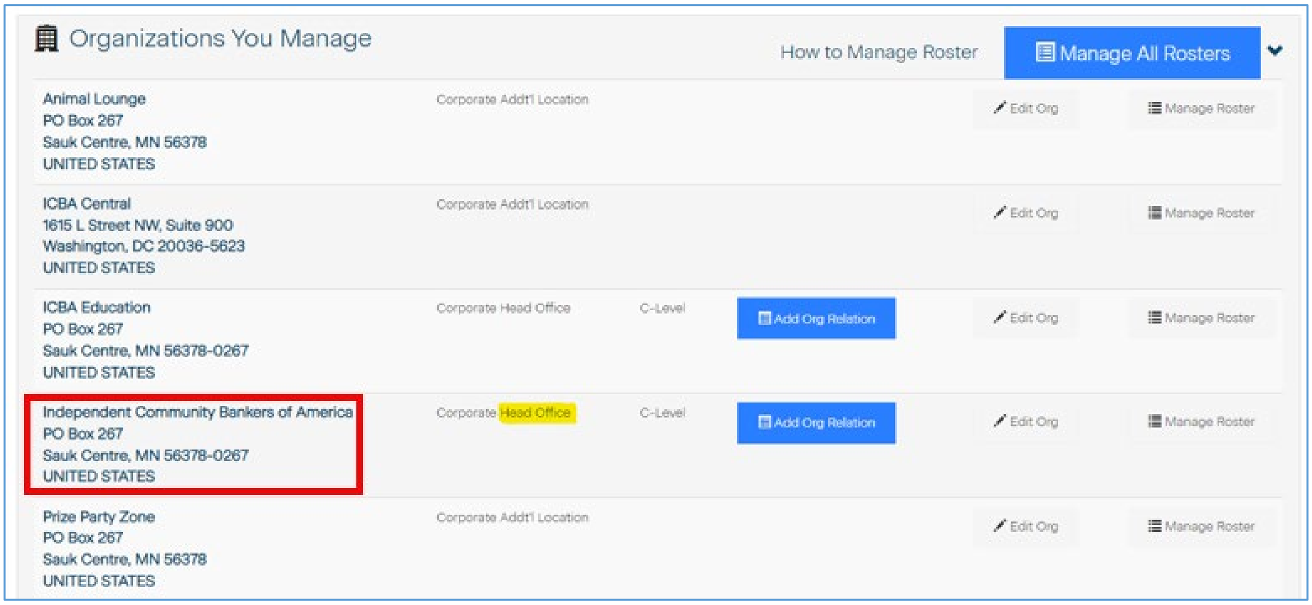




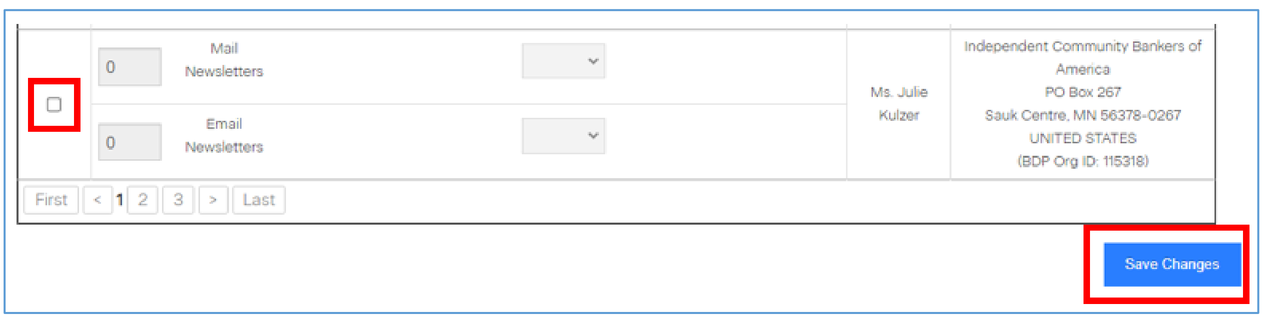
Remove Bank Director Access from an Account

If the director is no longer affiliated with the bank, follow the steps below to remove the Bank Director access permissions from their ICBA account.

1. An Administrator will go to 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 and click until you reach the section of the page for **Organizations You Manage**. If you have multiple locations, all your organization locations will be listed on the left side of the page. Locate the location labeled as your “Head Office,” click on the organization name/address for this head office location, as demonstrated in the red box below.



6. From the Organization Information Page (for your head office location) – Click the "**Manage BDP Directors**" link
7. To remove a director from the Bank Director Program, locate the director in the list of directors/employees (you may have to use the paging control at the bottom to get to subsequent pages), **UNCHECK the box** under the **BDP Director column** (1st column).
8. Scroll to the bottom and click the "**SAVE Changes**" button.



BANK DIRECTOR ONLINE TRAINING (BDOT) – 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, the following recommendations must be reviewed and implemented to ensure a positive end user experience.

Network Requirements

For users on company networks, 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 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	• 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+	• 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

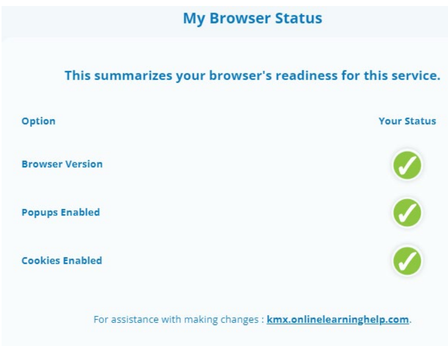
Many organizations have group policies and other security settings for Browsers that may hamper the ability for the courseware to load. While we may assist in identifying issues, we are unable to customize the courseware to work around internal IT policies.

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 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.

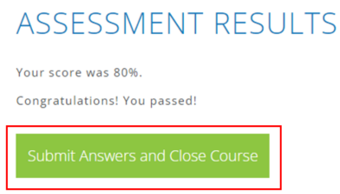


If you do not see all Green Checkmarks, system changes may be required on that particular computer. To learn how to make changes to the Browser settings, click on the link at the bottom of the screen (icba.onlinelearninghelp.com).

Courses Not Completing

If a director 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 Answer and Close Course” 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, you can use the steps for [BDOT Manual Completion Tracking]() found later in this document.

Additional Notes

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

- Throughout this Guide the Bank Director Online Training courses are referred to as "BDOT".

- 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. 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.

BANK DIRECTOR ONLINE TRAINING (BDOT) COURSE ADMINISTRATION

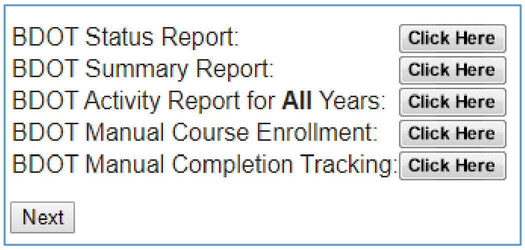
As an Administrator of the Bank Director Online Training (BDOT), you can

- Enroll your directors into online courses and videos
- Delete course enrollments for your directors
- Mark courses complete for your directors
- Run status reports.

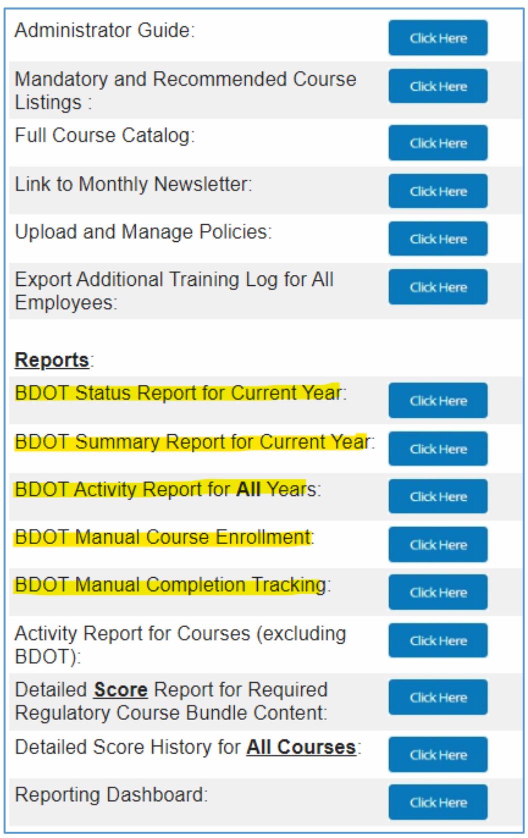
The following instructions will walk you through these various options. All of these options can be found in the blue "Administration" tab once you are logged into the Online Course Learning Management System (LMS).

www.icbalearning.org

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



For those with a BDP Membership and a bank online training subscription and are also an LMS Administrator, you will see more options such as the screenshot below. The only functions you will use as the BDOT Administrator are the 5 options with "BDOT" listed in the text, highlighted in the screenshot below. All the other functions are used for banks subscribe to one of our other Online Training plans. Currently, the Administrator Guide is not found online. When this guide is updated, an Education Team Member will e-mail you an updated version.



Course Enrollment - Enrolling your Bank Director into Online Courses

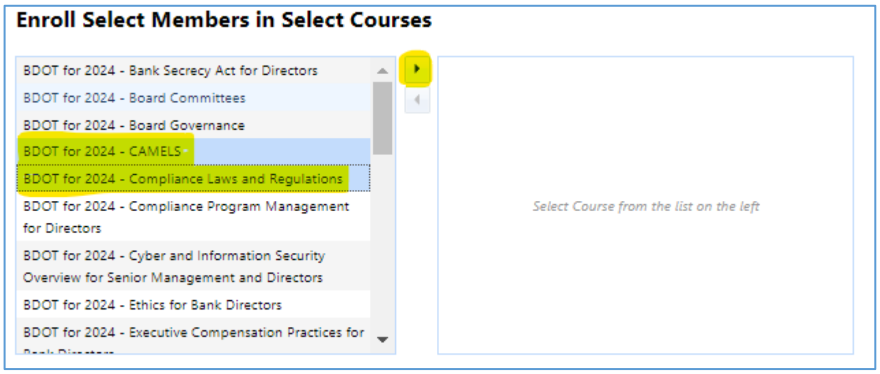
There are two ways a director can be enrolled into a Bank Director Online Training (BDOT) course or video.

1. Administrators can enroll Directors into select courses
2. Directors can self-enroll into select courses

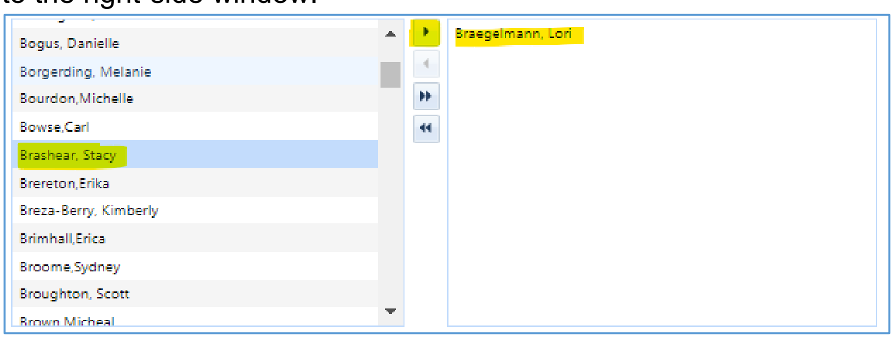
Option 1: Administrator Enrollment

A BDOT Administrator can enroll bank directors into BDOT courses by following these steps.

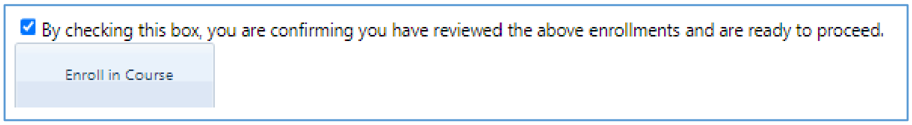
1. From the blue “Administration” tab, click the “Click Here” blue button next to BDOT Manual Course Enrollment.
2. Double-click the desired course or click to select the desired course and then click the single arrow to move the course from the left-side Available Courses window to the right-side Enrollment List window. Do this for each course you would like to enroll the director(s) in. You can also press and hold the Control Key to select more than one course before clicking on the arrow.



3. Double-click the desired director(s) OR click and highlight the desired director(s) and click the single arrow to move the director(s) from the available directors' window on the left to the enrollment list window on the right side of the screen. Do this for each director you would like to enroll in the specific courses you have selected above. You can press and hold the Control Key on your keyboard to select more than one director before clicking the arrow to move them to the right-side window.



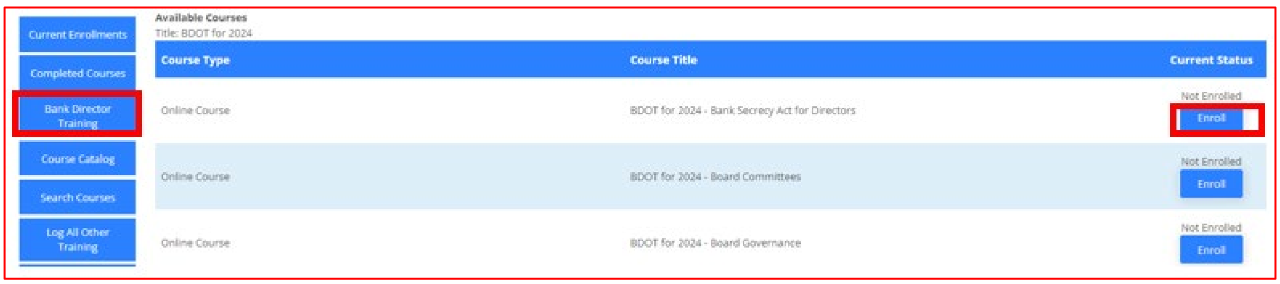
4. Review that you have all course(s) and all director(s) you desire into the boxes on the right side. Then check the box in front of the confirmation “**By checking this box, you are confirming you have reviewed the above enrollments and are ready to proceed**”, found below the list of directors.
5. Click the **Enroll in Course** button.
6. Click the **Administration** tab to return to the main screen.



Option 2: Director Self Enrollment

A bank director can enroll themselves into BDOT courses. 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 using the email address and password for your ICBA account. If you are unsure of what your login information is, please contact your bank's online training administrator.
2. Once logged in, click on the blue **Bank Director Training** tab on the left.
3. Click the blue **Enroll** button on the right of the course you wish to take. This will add the course to your list of Current Enrollments.



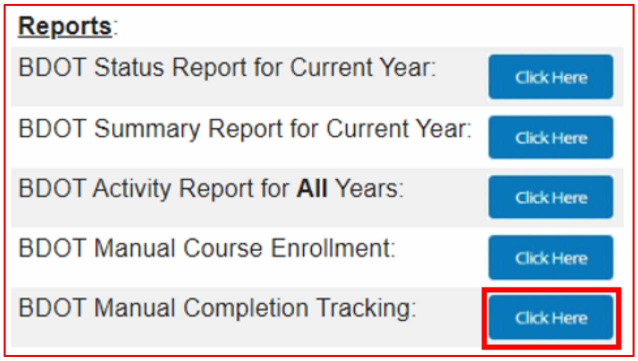
4. Click the blue **Current Enrollments** tab on the left. This is where you will launch the online course to complete it. Click the green **Launch** icon to the right of the course you wish to complete.

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

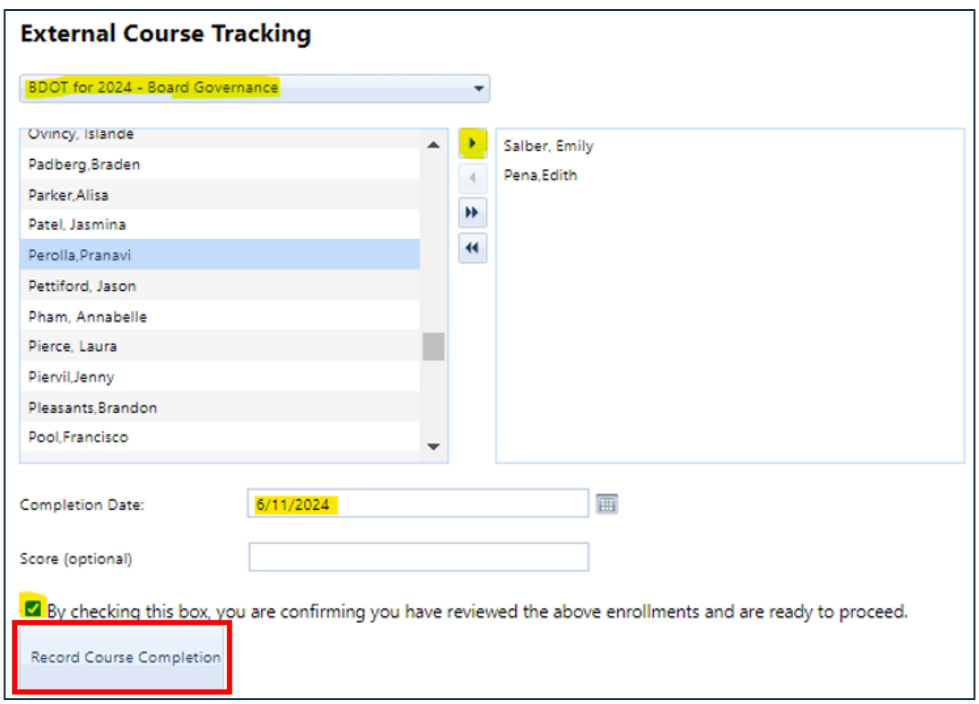
Manual BDOT Course Completion Tracking

Often, banks will take a specific BDOT course as a group during a regularly scheduled Director Meeting. 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 in attendance. To do this, complete the following instructions:

1. From the blue **Administration** tab, click on the "**Click Here**" next to the **BDOT Manual Completion Tracking**.



2. From the next screen, select the course title completed from the Course drop-down box.
3. Click and highlight the desired director(s) and click the single arrow to move the director from the available director's windows on the left side to the selected window on the right side. Do this for each director you would like to mark the course completed for. You may press and hold the Control Key on your keyboard to select more than one director before clicking the arrow to move them to the right-side window.
4. Enter the date the course was complete in the **Completion Date** box.
5. The **Score** is optional. Enter a value if one was completed and you wish to retain that.
6. Click the **Record Course Completion** button.



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

BDOT Reporting Options

The courses contained in the BDOT change every January 1st. There are three different types of activity reports a BDOT Administrator can retrieve 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

From the blue **Administration** tab, by clicking on "**Click Here**" next to **BDOT Status Report for Current Year**, you will see a listing of all the BDOT courses per all your directors. This does not mean your directors have enrolled in all the BDOT courses. If they have been enrolled into any of the BDOT courses, the Enrollment Date will show the date this was done. If the BDOT course has been completed, you will see a date in the Results Date column as well as a Completed Satisfactorily value in the Status column. If they are enrolled into the course but it has not yet been completed the Status will state "Not Completed". This report can be exported into an Excel file by clicking on the Microsoft Excel green icon in the upper left.

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 Status Report Preview - Current Year (Export to Excel for Full Report)

Name	Course	Results Date	Grade	Enrollment Date	Status	Bank
Braegelmann, Lori	BDOT for 2024 - Bank Secrecy Act for Directors		0.0	2024-06-11 16:15:34.403	Not Completed	Independent Community Bankers of America
Braegelmann, Lori	BDOT for 2024 - Board Committees					Independent Community Bankers of America
Braegelmann, Lori	BDOT for 2024 - Board Governance					Independent Community Bankers of America
Braegelmann, Lori	BDOT for 2024 - CAMELS					Independent Community Bankers of America
Braegelmann, Lori	BDOT for 2024 - Compliance Laws and Regulations					Independent Community Bankers of America
Braegelmann, Lori	BDOT for 2024 - Compliance Program Management for Directors					Independent Community Bankers of America
Braegelmann, Lori	BDOT for 2024 - Cyber and Information Security Overview for Senior Management and Directors					Independent Community Bankers of America

Summary Report for Current Year

From the blue **Administration** tab, by clicking on "**Click Here**" next to **BDOT Summary Report for Current Year**, you will see a listing of all your directors that are currently enrolled in the Bank Director Program. The Percentage column is assuming you are assigning all 20 of the BDOT courses to them. 100% completion would mean they have completed all 20 courses. If you assign 10 of the courses and the completion percentage is 50% that means they have completed the 10 courses, they have been enrolled into. This report can be exported into an Excel file by clicking on the Microsoft Excel green icon in the upper left.

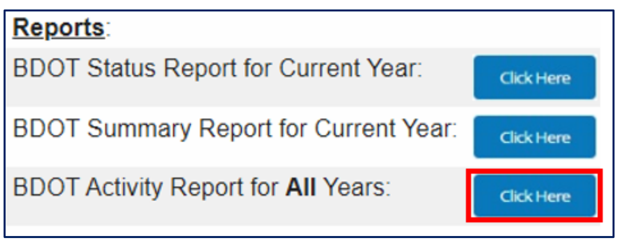
Reports:	
BDOT Status Report for Current Year:	Click Here
BDOT Summary Report for Current Year:	Click Here
BDOT Activity Report for **All** Years:	Click Here

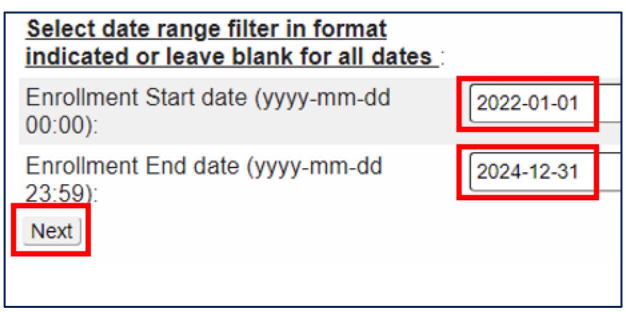
BDOT Summary Report Preview - Current Year (Export to Excel for Full Report)

Certification Title	Name	Percent Complete
BDOT for 2024	Braegelmann, Lori	.00
BDOT for 2024	Daly,Timothy	.00
BDOT for 2024	Edwards Hosmer,Leah	.00
BDOT for 2024	Forschen,Jenny	.00
BDOT for 2024	Gauger,Kathy	.00
BDOT for 2024	Gully,Chris	.00
BDOT for 2024	Hanson,Julie	.00
BDOT for 2024	Ho,Antonio	.00
BDOT for 2024	Klasen,Jean	.00
BDOT for 2024	Kortan,Michelle	.00
BDOT for 2024	LaNore,Lindsay	.00
BDOT for 2024	Lutat,Faith	.00
BDOT for 2024	Lynch,Chip	3.00

Activity Report for All Years

From the blue **Administration** tab, by clicking on “**Click Here**” next to **BDOT Activity Report for All Years**, you will access a report that pulls activity for the current year as well as past years of course enrollments. You will enter a start and end date range for the report results you desire. 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 green icon in the upper left.





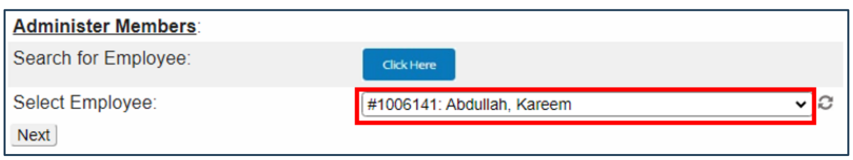
BDOT Enrollment Status Report Preview - All Years (Export to Excel for Full Report)

Completion Date	Name	Course	Status	Grade	Bank Name
2023-11-21 11:38:08	Braegelmann, Lori	BDOT for 2023 - Compliance Laws and Regulations	Completed Satisfactorily	.0	Independent Community Bankers of America
	Braegelmann, Lori	BDOT for 2024 - Bank Secrecy Act for Directors	Not Completed	.0	Independent Community Bankers of America
	Braegelmann, Lori	BDOT for 2024 - Video: The Role of the Chairman and Effective Committees	Not Completed	.0	Independent Community Bankers of America
2024-03-05 12:27:52	Lynch,Chip	BDOT for 2024 - Board Committees	Completed Satisfactorily	.0	Independent Community Bankers of America
	Lynch,Chip	BDOT for 2024 - Video: You Are a Community Bank Director	Not Completed	.0	Independent Community Bankers of America
	Pena,Edith	BDOT for 2024 - Red Flags Identity Theft Training for Directors	Not Completed	.0	Independent Community Bankers of America
2023-12-05 17:01:33	Salzl,Cindy	BDOT for 2023 - Bank Secrecy Act for Directors	Completed Satisfactorily	.0	Independent Community Bankers of America
2023-05-02 10:00:05	Salzl,Cindy	BDOT for 2023 - Board Committees	Completed Satisfactorily	.0	Independent Community Bankers of America
2023-12-06 10:12:20	Salzl,Cindy	BDOT for 2023 - Board Governance	Completed Satisfactorily	.0	Independent Community Bankers of America
2023-12-06 11:09:56	Salzl,Cindy	BDOT for 2023 - Compliance Laws and Regulations	Completed Satisfactorily	.0	Independent Community Bankers of America
2023-12-06 10:22:27	Salzl,Cindy	BDOT for 2023 - Compliance Program Management for Directors	Completed Satisfactorily	.0	Independent Community Bankers of America
2023-12-06 11:15:47	Salzl,Cindy	BDOT for 2023 - Cyber and Information Security Overview for Senior Management and Directors	Completed Satisfactorily	.0	Independent Community Bankers of America
	Salzl,Cindy	BDOT for 2024 - Bank Secrecy Act for Directors	Not Completed	.0	Independent Community Bankers of America
	Salzl,Cindy	BDOT for 2024 - Board Committees	Not Completed	.0	Independent Community Bankers of America
	Salzl,Cindy	BDOT for 2024 - Video: Bank Regulatory Process	Not Completed	.0	Independent Community Bankers of America
	Salzl,Cindy	BDOT for 2024 - Video: The Role of the Chairman and Effective Committees	Not Completed	.0	Independent Community Bankers of America
2022-12-28 11:08:27	Snyder,Mandy	BDOT for 2022 - Board Committees	Completed Satisfactorily	.0	Independent Community Bankers of America
2022-01-05 10:49:57	Snyder,Mandy	BDOT for 2022 - Compliance Laws and Regulations	Completed Satisfactorily	.0	Independent Community Bankers of America
2022-01-05 10:58:01	Snyder,Mandy	BDOT for 2022 - Fair Lending for Bank Directors	Completed Satisfactorily	.0	Independent Community Bankers of America
2022-01-05 11:07:19	Snyder,Mandy	BDOT for 2022 - Understanding UDAAP	Completed Satisfactorily	.0	Independent Community Bankers of America

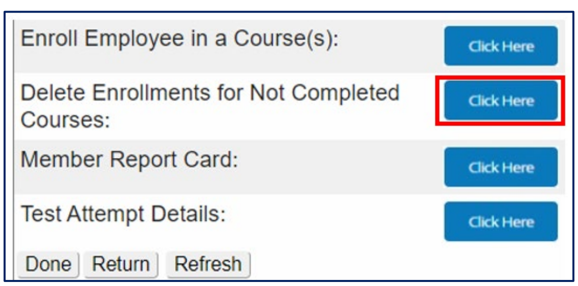
Deleting a BDOT Course Enrollment for a Director

If a director has self-enrolled into a course by mistake or you want to change the courses, you have enrolled a director(s) into follow these steps:

From the blue **Administration** tab, find the director in the list of members in the bottom **Administer Members** section – the picklist box for **Select Employee**, or click on the Click Here blue box by Search Employee in this same section.



From the next screen after you chose your director, click on the blue **Click Here** button next to the **Delete Enrollments for Not Completed Courses** option.



From the next screen, select the course(s) from the Course Enrollments box on the left for this director and use the arrow to move the course to the right-side window that you want to delete from their list of course enrollments.

Check the **box** that states "**By checking this box, you are confirming you have reviewed the above enrollments and are ready to proceed.**"

Then click the **Delete Enrollment** button.

The course(s) you selected will no longer appear on this director's **Current Enrollments** tab.