



SMARTPROS LTD.

PROFESSIONAL EDUCATION CENTER  
**USER'S GUIDE**  
**BANKING EDITION**

Document version 1.0 - Banking  
Updated April 20, 2006

## TABLE OF CONTENTS

BASIC NAVIGATION.....	3
The Home Page .....	3
My Courses Tab .....	3
ACCOUNT FEATURES.....	4
Creating an Account .....	4
Logging On .....	4
Updating Your Profile.....	4
Forgotten Passwords .....	5
THE MY COURSES AREA.....	6
Completed Credits.....	6
Available Subscriptions.....	6
Promotional/Billing Codes.....	6
Newsletters .....	6
Removing Enrolled Courses .....	7
Course Functions.....	8
Courses in Progress.....	9
Completed Courses .....	10
Course History .....	11
External Course Journal.....	12
Surveys.....	13
Launching A Course .....	13
Logging Out.....	13
BROWSING THE COURSE CATALOG.....	14
The Catalog View Page .....	15
ENROLLING IN A COURSE.....	16
Enrollment .....	16
Pay by Subscription or Credits .....	16
Promotional Codes.....	16
The Shopping Cart.....	16
FAQS, HELP AND SYSTEM CHECK.....	18
Check Your System .....	18
frequently asked Questions (FAQs) .....	18
Help.....	18
OTHER SECTIONS.....	19
About Us.....	19
Contact Us .....	19

## BASIC NAVIGATION

### THE HOME PAGE

The *Home* page is your portal to all SmartPros courses and features. From here you can access courses, your course history and other helpful information such as user guides and FAQs.

The screenshot shows the Professional Education Center (PEC) home page. At the top, there is a green header with the logo for 'THE BANK & TRUST' and the text 'PROFESSIONAL EDUCATION CENTER'. Below this is a navigation bar with three tabs: 'HOME', 'BANKING', and 'MY COURSES'. The 'HOME' tab is currently selected. The main content area is divided into several sections. On the left, there is a search bar and a link to 'User Guides'. The central area contains a welcome message and a list of instructions for existing students. On the right, there is a 'LOGON' section with input fields for 'USERNAME' and 'PASSWORD', and links for 'Forgot Password?' and 'New User?'. Below the logon section, there is a 'FEATURED COURSES' section and a 'CHECK YOUR SYSTEM' section with a link to 'Don't know if you have the right players on your system?'.

You can return to the home page at any time by clicking the **Home** tab located near the upper left of your browser window.

### MY COURSES TAB

Clicking on the **My Courses** tab brings you to the *My Courses* area. From here you can manage your account as well as current and past SmartPros courses.



## ACCOUNT FEATURES

### CREATING AN ACCOUNT

To create an account:

- Click the **NEW USER** link located in the LOGON section of your screen..
- Fill in the requested information on the Profile page.

**NOTE: You must fill in information marked by a red asterisk.**

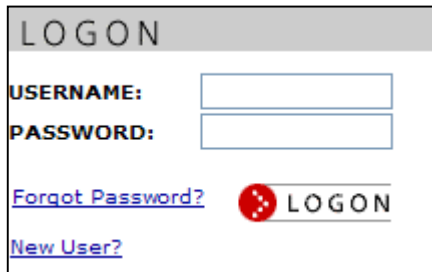


The screenshot shows a web form titled "LOGON". It contains two input fields: "USERNAME:" and "PASSWORD:". Below the fields are three links: "Forgot Password?", "New User?", and a "LOGON" button with a red asterisk icon.

### LOGGING ON

You can logon:

- At the top right of the *Home* page or
- On the *My Courses* Page



This is an identical screenshot to the one above, showing the "LOGON" form with "USERNAME:" and "PASSWORD:" fields, and links for "Forgot Password?", "New User?", and a "LOGON" button with a red asterisk icon.

Enter your username and password to logon. Once you've logged on, your name will appear near the top of the screen and you will have access to the *My Courses* page.

### UPDATING YOUR PROFILE

To edit or update your profile:

- Click the **Update Profile** link located under your name at the top of the screen.



The screenshot shows a user profile bar with the text "logged in as: Joe User" and two links: "LOG OUT" and "UPDATE PROFILE".

From the *Update Profile* page you can edit your:

- Name
- Street Address
- City
- State
- Zip Code
- Phone Number
- Fax Number

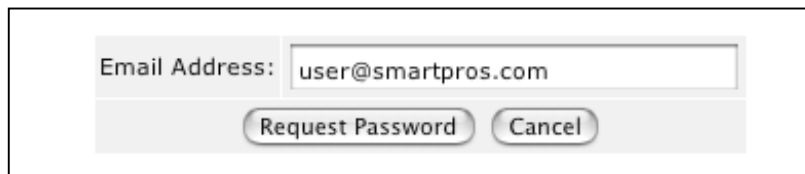
- Email Address
- Password

**NOTE: Required fields are marked with a red asterisk.**

## FORGOTTEN PASSWORDS

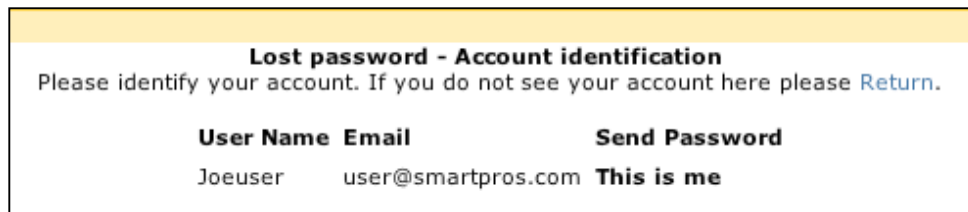
To retrieve a lost or forgotten password:

- Click on the **Forgot Password?** link in the LOGON section of your screen.
- Enter your email address. Make sure to enter the email address used to register with SmartPros.



Email Address:

- Click the **Request Password** button.
- You'll be presented with the username associated with the entered email address. If the username is yours then click **This is Me**. Your password will immediately be emailed to you.



**Lost password - Account identification**  
Please identify your account. If you do not see your account here please [Return](#).

User Name	Email	Send Password
Joeuser	user@smartpros.com	<b>This is me</b>


- If you do not see your username, click the **Return** link. This will bring you back to the enter email page.

## THE MY COURSES AREA

Found at the top of the *My Courses* area, the *Course and Credit Summary* is intended to give you a quick summary of your progress in the SmartPros system.

### COMPLETED CREDITS

- **PEC Credits:** indicates the number of credits you have earned through taking SmartPros courses. Note that this area may not appear if it is not applicable to your account.
- **External Credit:** indicates the number of credits you have entered into the *External Course Journal*. This is an optional area and is used to track your education progress from other sources. Note that this area may not appear if it is not applicable to your account.
- **Current Credit Total:** Indicates the total number of credits earned from both PEC and external sources.

- | COURSE AND CREDIT SUMMARY |  |
|---------------------------|--|
| ■                         | MY COMPLETED CREDITS   |
| PEC Credits: 0            | External Credits: 0 <b>Current Credit Total: 0</b>   |
| ■                         | PROMOTIONAL CODE   |
| <input type="text"/>      |  SUBMIT |

### AVAILABLE SUBSCRIPTIONS

Subscriptions assigned to your account are listed in this section. This summary section will not appear if there are no subscriptions available. The expiration date of your subscription is listed immediately after the title. Once this date has passed, your subscription is no longer valid and must be renewed in order to access any courses in your account. Note that courses in your course history or completed courses and all certificates will still be available after this date.







### PROMOTIONAL/BILLING CODES

If you have been assigned a promotional/billing code, please enter it here. If you have not been assigned a code, you may ignore this section.

### NEWSLETTERS

Any newsletters you have subscribed to on the *My Profile* page will be listed in this section. Newsletters can be added or deleted by clicking **View Options** in the newsletters section or by clicking **Update Profile** at the top of the screen under your name.

## REMOVING ENROLLED COURSES

COURSES IN PROGRESS		COMPLETED COURSES	COURSE HISTORY	EXTERNAL COURSE JOURNAL	Expiration Date	Current Credits	Status
<input checked="" type="checkbox"/>		991004	Travel, Entertainment, Gift, and Car Expenses (SPA) 		Jul 15, 2005	6.00	Paid
<input type="checkbox"/>		998646	CPAR GOV/NFP - Vol. 2003 - No. 4 - A - Improving Audit Quality - The First Steps (CPAR) 		Jul 15, 2005	2.00	Paid
(Click  to view detail)							
 REMOVE CHECKED COURSES							

To remove a course you've enrolled in from your account:

- Check the remove course checkbox.
- Click the **Remove Checked Courses** button.

**NOTE: Removing a course from your account is permanent. You may enroll in the course again, but you will be required to start again from the beginning. If you purchased an individual course by credit card (as opposed to purchasing a subscription), you will not be able to remove the course and get a credit, unless you are within the 30-day purchase period.**

## COURSE FUNCTIONS

The tabs across the top middle of the *My Courses* section (see picture below) navigate the course functions tools. Clicking on the tabs where indicated will take you to each section.



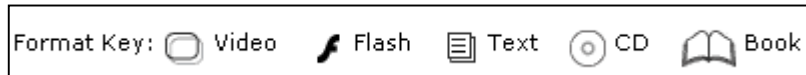
## Courses in Progress


The *Courses In Progress* tab gives you access to all courses for which you are currently enrolled. The list of courses will appear immediately below the navigation tabs.

		Catalog					Expiration		Current	
		Formats	Number	Course Title	(Subs. Brand)			Date	Credits	Status
<input type="checkbox"/>		998034	Partnership Taxation I (ISDN or higher-video)(56k and lower-audio) (SPA)  (8)				5.09.05	1.00	Passed	
(1)	(2)	(3)	(4)				(5)	(6)	(7)	

The above columns are defined as:



1. Remove course checkbox: See above for how to remove courses.
2. Formats: Indicate the type of course in your order. Refer to the Format Key below for more information.



3. Catalog number: The catalog number of your course.
4. Course Title: The title of your course.
5. Expiration Date: The date at which the course will expire and can no longer be used. This date is the earlier of either the course's expiration date or your subscription's expiration date (if applicable.)
6. Credits: The number of credits that can be earned by completing this course.
7. Status: The current status of the course.
8. Course detail icon (): Click the Course Detail Icon to view details of the course, such as the author and full description.

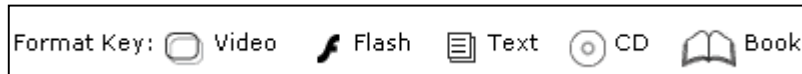
## Completed Courses


This section lists courses you have successfully completed, as well as the details of each course. If you wish to obtain one, course certificates are available in this section.

		Catalog	Course Title (Subs, Brand)				Credits	Status	Completion	Score
(1)	(2)	Number	(3)	(4)	(5)	(6)	(7)	(8)		
<input type="checkbox"/>		999052	Communications Technology Terms and Options (SPA)	 <sup>(9)</sup>	<a href="#">(view certificate)</a> <sup>(10)</sup>	1.00	Passed	Jan 1 2004 12:00AM	100%	

The above columns are defined as:

1. Move to history checkbox: Used to move a completed course to the *Course History* section.
2. Formats: Indicate the type of course in your order. Refer to the Format Key below for more information.



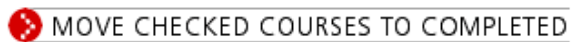
3. Catalog number: The catalog number of your course.
4. Course Title: The title of your course.
5. Credits: The number of credits that can be earned by completing this course.
6. Status: The current status of the course.
7. Completion: The date the course was completed.
8. Score: Your final score after completing the final exam for the course.
9. Course detail icon (): Click the Course Detail Icon to view details of the course, such as the author and full description.
10. View Certificate: If you have earned a certificate for your course, you can view it here.

## **COURSE HISTORY**

The *Course History* tab is meant to archive courses you have already completed, but no longer wish to list in the *Completed Courses* section. For example, you may wish to store courses here for which you have already reported your CE credit. Courses listed in the *Course History* are otherwise exactly the same as courses listed in the *Completed Courses* Section.

To move courses back to the *Completed Courses* section:

- Check the box to the left of the course title and then click the **Move Checked Courses to Completed** button.



## **External Course Journal**

The *External Course Journal* is intended to keep record of any courses you have passed from sources *outside* the SmartPros system. You may wish to list credits earned from seminars or classroom courses. This section is intended for your reference and convenience only.

To add an entry:

- Click the **Add Course to Journal** button. You may modify or delete any entry by clicking the **modify** link immediately to the right of the title.

## Surveys

Upon completion of a course, you may be asked to participate in a Survey. Surveys are intended to provide SmartPros with feedback on the course you have taken.

## LAUNCHING A COURSE

There are two ways to launch a course within the SmartPros system

1. From the *My Courses* page, click on the course title for the course you wish to launch under the *Courses In Progress* tab.

COURSES IN PROGRESS		COMPLETED COURSES	COURSE HISTORY	EXTERNAL COURSE JOURNAL		
Formats	Catalog Number	Course Title (Subs. Brand)			Expiration Date	Credits
<input type="checkbox"/>	991004	Travel, Entertainment, Gift, and Car Expenses (SPA) <a href="#">i</a>			Jul 15, 2005	6.00
<input type="checkbox"/>	998646	CPAR GOV/NFP - Vol. 2003 - No. 4 - A - Improving Audit Quality - The First Steps (CPAR) <a href="#">i</a>			Jul 15, 2005	2.00

(Click [i](#) to view detail)

2. From any catalog page, select a course and click the **Launch** button in the Catalog list, located in the rightmost column

Formats	Catalog Number	Course Title (Subs. Brand)	Price/Credits	Status	Action
<input type="checkbox"/>	000000	Transactional Efficiency Meets Financial Policy (SPA) <a href="#">i</a>	1.00 \$0.00		LAUNCH
<input type="checkbox"/>	8004	How to Prevent Sexual Harassment and Hostile Work Environments--Manager Version (SPA) <a href="#">i</a>	4.00 \$79.96		ENROLL

Note that the *Launch* option is only available for courses you have already enrolled in.

## LOGGING OUT

To Log Out:

- Click the **Log Out** button located beneath your name at the top of the screen.



## BROWSING THE COURSE CATALOG

You can view available courses by:

- Selecting a discipline tab located near the top of the page









Clicking a discipline tab will bring you to a catalog page. (Example below)



Selecting a subject area from this catalog page will bring you to the Catalog view page. (Example below)

HOME		BANKING		MY COURSES	
<b>Lending</b>					
Formats	Catalog Number	Course Title (Subs. Brand)	Credits	Price/Status	Action
	A0136-0A	Analyzing Financial Statements (AICC_SAGE)	2.00	\$112.00	ENROLL
	A0148-0B	Appraisal Requirements on Residential Real Estate (AICC_SAGE)	2.00	\$112.00	ENROLL
	A0153-0A	Introduction to Consumer Lending (AICC_SAGE)	2.00	\$112.00	ENROLL
	A0158-0A	Consumer Loan Documentation (AICC_SAGE)	2.00	\$112.00	ENROLL

## The Catalog View Page

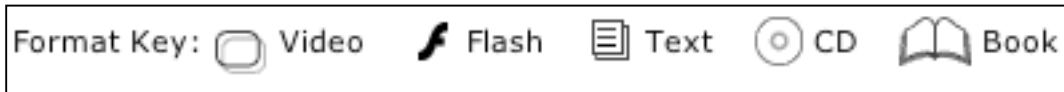
SPA SmartPros Advantage Courses					
Formats	Catalog Number	Course Title (Subs. Brand)	Credits	Price/Status	Action
	000000	Transactional Efficiency Meets Financial Policy (SPA)  (7)	1.00	\$0.00	LAUNCH
	8004	How to Prevent Sexual Harassment and Hostile Work Environments--Manager Version (SPA) 	4.00	\$79.96	ENROLL
	8005	How to Prevent Sexual Harassment and Hostile Work Environments--Employee Version (SPA) 	4.00	\$79.96	ENROLL


(1) (2) (3) (4) (5) (6)

When you arrive at the Catalog view page, you'll be presented with a screen similar to the one above.

The columns in the catalog view are:

1. Formats: Indicates the type of goods and media included in the course. Refer to the Format Key below for more information.



2. Catalog Number: The Catalog number of the course.
3. Course Title: Indicates the title of the course.
4. Credits: Credits that can be earned from this course.
5. Price: The Price to Enroll in the course.
6. Action: For courses you have not enrolled in, this will be *Enroll*. For courses you have already enrolled in, it will be a *Launch* button.
7. Course Detail Icon (): Information and course details. Clicking this button will provide you with a detailed summary of the course, including its cost, author, level, prerequisites, type and expiration date.

## ENROLLING IN A COURSE

### ENROLLMENT

To enroll in a course:

- Click on discipline tab – such as *BANKING* – near the top of your screen.



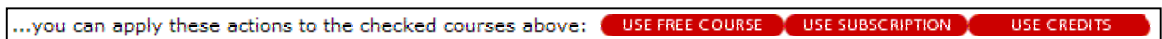
- Select a course subject area from the list. This will bring you to the catalog for that subject area within your discipline.

HOME	BANKING	MY COURSES
<b>Lending</b>		
Catalog	Course Title (Subs. Brand)	Price/
Formats	Number	Credits Status Action
<input type="checkbox"/>	A0136-0A Analyzing Financial Statements (AICC_SAGE) <b>i</b>	2.00 \$112.00 ENROLL
<input type="checkbox"/>	A0148-0B Appraisal Requirements on Residential Real Estate (AICC_SAGE) <b>i</b>	2.00 \$112.00 ENROLL
<input type="checkbox"/>	A0153-0A Introduction to Consumer Lending (AICC_SAGE) <b>i</b>	2.00 \$112.00 ENROLL
<input type="checkbox"/>	A0158-0A Consumer Loan Documentation (AICC_SAGE) <b>i</b>	2.00 \$112.00 ENROLL

- Click the **Enroll** button for your desired course.
- To continue with your purchase click **Proceed**. This will bring you to your Shopping cart.

### PAY BY SUBSCRIPTION OR CREDITS

If you have courses in your shopping cart that are a part of a valid subscription, click the **Use Subscription** button to add them to your account. Similarly, if you have available credits, you may apply your credits to the courses purchased here. These options will only be visible if available.



### PROMOTIONAL CODES

Promotional codes may allow you to purchase courses at a discount, or to activate a prepaid subscription.. If you have a promotional code, enter it into the promotional code field on the *My Courses* page and click the **Submit** button.

### THE SHOPPING CART

Any items you've added to your purchase cart are listed here. This may include individual courses or subscriptions. This tab will not appear if your shopping cart is empty.

**Custom Billing Code** – If you have a Custom Billing Code, enter it in the box to the left of the *Purchase* button. If you do not have a billing code, you may ignore this section.

### **Completing Your Order**

To complete your order, click the **Purchase Now** button.



**PURCHASE NOW**

## FAQS, HELP AND SYSTEM CHECK

### CHECK YOUR SYSTEM

Located below the *LOGON* box on the home page, *Check Your System* allows you to check your computer to see if you have the necessary media players.

### CHECK YOUR SYSTEM

Don't know if you have the right  
players on your system?

Clicking the **Don't know if you have the right players on your system?** link will bring you to the *System Requirements* section of the *Help* page.

### FREQUENTLY ASKED QUESTIONS (FAQS)

The *FAQ* link is intended to answer commonly asked questions you might have while using the Professional Education Center.

To access the FAQs:

- Click the **FAQ** link located in the left navigation column of the Home page.

Navigate to your desired FAQ by clicking the desired question.

### HELP

The *Help* link is intended to provide answers to questions about system requirements, SmartPros policies, and links to user guides.

To access Help:

- Click the **Help** button located on the top right of any page.

Navigate *Help* by clicking the help topic categories at the left of the screen.

## **OTHER SECTIONS**

### **ABOUT US**

Clicking the **About Us** button at the top right of your browser will bring you to the SmartPros *About Us* page.

From there you can learn more about SmartPros, read press releases, learn who our clients are and even browse available jobs.

### **CONTACT US**

To contact SmartPros, click the **Contact Us** button at the top right of your browser. Doing so will open a window showing email addresses, phone numbers and physical addresses for SmartPros offices.