

Learning Center

Quick Reference Guide

Department of Defense and GSA
SmartPay[®]

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Treasury and Trade Solutions





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Learning Center Overview

A complete suite of training resources is available from the Learning Center, Citi’s Learning Management System (LMS).

The Learning Center provides on-demand, self-paced training so you can complete computer based training and access reference documents at any time. If you need to exit a course prior to completion, you can access it again and begin where you left off. You can also register for instructor-led webinars and onsite instructor-led classroom training.

Access the Learning Center

If you have a Cardholder and Non-cardholder login for different companies, you will need to set the Non-cardholder company as your primary company in order to access the Learning center. To change your primary company, click the **My Profile** link that displays at the top of the screen. When **My Profile** screen displays, click the **Change Primary Company** link and select the radio button for the company you wish to set as your primary company.

Screen	Step/Action
<p>CitiManager Site Home Screen</p>	<ol style="list-style-type: none"> From the CitiManager Site navigation bar, position your mouse over the Resources & Tools drop-down menu and click the Learning Center link. <i>The Learning Center Home screen displays.</i>

Learning Center Navigation

Screen	Step/Action
	<ol style="list-style-type: none"> Citi Logo — Click the Citi logo to access the Learner Dashboard. Self Menu — Click the Self drop-down arrow to access your dashboards, training transcript and training schedules. Search Menu — Click the arrow that displays to the left of the Search field to filter your search by Learning (guides or training) or Navigation. Type your search criteria in the Search field and click the Magnifying Glass icon. Self Icon — Click the Self icon and then the Signout link to sign out. Home Icon — Click the Home icon to return to your Learner Dashboard. Timeline Icon — Click the Timeline icon to access a timeline of your training resources and courses. Library Icon — Click the Library icon to navigate to a library of training resources and courses. Training Schedule — Click the Training Schedule icon to access your upcoming training schedule. Training Transcript — Click the Training Transcript icon to access your training transcript. Search — Enter your search criteria in the text field to search for training resources or courses. Navigating the Learning Center — Click the appropriate link to view the Learning Center Quick Reference Guide. Training Surveys — Click the Pending Activity Evaluations link, if it displays, to start an evaluation for any instructor-led training you attended. My Schedule — Click on the calendar dates for a quick glance of your upcoming trainings.

Learning Center Home Screen

Screen	Step/Action
<p>Learning Center Home Screen</p>	<p>14. Catalog — Click the catalog topic links to access computer-based training (CBTs), register for instructor-led webinars, register for on-site classroom trainings and access reference documents.</p> <p>15. To Do — This list displays the courses or documents to which you have registered. To open a reference document or start/re-start a course, click the Start button from this list.</p> <p>16. Start/View Details — From your To Do list, click the Start button for the document, CBT or instructor-led webinar you want to open/start. Click the drop-down arrow to view details or select an option to cancel your registration or add it to your Favorites menu.</p> <p>Note: For instructor-led webinars, the View Details button will display until 15 minutes prior to the scheduled start time and then the Start button will display.</p>

View a Computer Based Training

Screen	Step/Action
<p>The screenshot shows the Learning Center Home interface. On the left, the 'Library' icon is highlighted in the navigation menu. The main content area features a 'CATALOG' section with three topic cards. The first card, 'CitiManager', is highlighted with a yellow border and contains 73 activities. Below the catalog, there are sections for 'TO DO', 'TRAINING SURVEYS', and 'MY SCHEDULE'.</p>	<ol style="list-style-type: none"> From the Learning Center Home screen, click the Catalog Topic to view an unfiltered list of that topic's training resources and courses that will not be sorted by activity type. <p>OR</p> <p>To search for a specific computer based training, in the Search field type your search criteria.</p> <p>OR</p> <p>Click the Library icon to view a filtered list of training resources and courses that is sorted by activity type.</p> <p>In this example, we will use the Library icon.</p> <p><i>A list of library topics display on the left.</i></p>
<p>Learning Center Home Screen</p>	
<p>The screenshot shows the 'Library' page with 'CitiManager' selected. The 'FULL LIBRARY' section displays 20 results. The first result is 'CitiManager Basic', an instructor-led course. Other results include user guides and summary updates. The interface includes a search bar, filters, and a 'Sort By' dropdown.</p>	<ol style="list-style-type: none"> Click the arrow next to the topic name to view a filtered list of training resources and courses by activity type, for example Computer Based Trainings, Reference Documents and Instructor Led Webinars. <p>Note: If the topic name is clicked, training resources and courses will display to the right in an unfiltered list that are not sorted by activity type.</p>
<p>Learning Center — Library — Unfiltered</p>	

Screen	Step/Action
<p>Learning Center — Library — Filtered — Computer Based Training</p>	<p>3. Click Computer Based Trainings (CBTs).</p> <p><i>A list of CitiManager CBTs display to the right.</i></p>
<p>Select Activity and Start</p>	<p>4. To view a CBT, click the ellipsis (...) to the right of the activity you wish to view then click Start.</p> <p><i>The Content player loads.</i></p> <p>Note: If a popup blocker message displays, click the Start or Launch Course button/link.</p>

Register for Instructor Led Webinar

Screen	Step/Action
<p>Learning Center Home Screen</p>	<ol style="list-style-type: none"> From the Learning Center Home screen, click the Catalog Topic to view an unfiltered list of that topic's training resources and courses that will not be sorted by activity type. OR To search for a specific instructor-led webinar, in the Search field type your search criteria. OR Click the Library icon to view a filtered list of training resources and courses that is sorted by activity type. In this example, we will use the Catalog icon. <i>A list of library topics display on the left.</i>
<p>Learning Center — Library — Unfiltered</p>	<ol style="list-style-type: none"> Click the arrow next to the topic name to view a filtered list of training resources and courses by activity type, for example Computer Based Trainings, Reference Documents and Instructor Led Webinars. Note: If the topic name is clicked, training resources and courses will display to the right in an unfiltered list that are not sorted by activity type.

Screen	Step/Action
<p>Learning Center — Library — Filtered — Instructor Led Webinar</p>	<p>3. Click Instructor Led Webinars.</p> <p><i>A list of CitiManager Instructor Led Webinars display to the right.</i></p>
<p>Select and Register</p>	<p>4. To register for an instructor led webinar, click the ellipsis (...) to the right of the training you wish to register for then click Register.</p> <p><i>The Offerings screen displays.</i></p> <p>Note: If you registered for a previous date and did not attend or were not marked as attended by the Trainer, the View Details/Cancel Registration link will display on the drop-down menu. You will need to cancel previous registration before the Register button displays.</p>

Screen	Step/Action
<p>Offerings and Register</p>	<ol style="list-style-type: none"> Select the Add button for the desired date. Click the Register button. <p><i>The Activities screen displays and a Registered message.</i></p>
<p>Learning Center — To Do — Start Webinar</p>	<ol style="list-style-type: none"> Fifteen minutes prior to the start of the webinar, log back into Learning Center and click Start button displayed in your To Do list. <p>Note: The Start button will not be visible until 15 minutes prior to the session.</p>

Register for In-Person Training

Screen	Step/Action
<p>Learning Center Home Screen</p>	<ol style="list-style-type: none"> From the Learning Center Home screen, click the Library icon to view a filtered list of training resources and courses that is sorted by activity type. <i>A list of library topics display on the left.</i>
<p>Library — In-Person Training</p>	<ol style="list-style-type: none"> Click In-Person Training. <i>The trainings display to the right.</i>

Screen	Step/Action
<p>The screenshot shows the 'LIBRARY' page with a filter for 'In-person Training'. Three results are displayed. The first result is highlighted with a yellow box: 'DoD Travel: Norfolk, VA Classroom - CitiManager End-to-End Training'. Below it are two other results: 'DoD Travel: Norfolk, VA Classroom - Visa IntelliLink' and 'GSA: Norfolk, VA Classroom - CitiManager End-to-End Training'.</p>	<p>3. To register for an In-Person Training, click the title of the training.</p> <p><i>The Instructor Led Course — Details screen displays.</i></p>
<p>The screenshot shows the 'DETAILS' view of the selected training. At the top right, there is a blue 'REGISTER' button. Below the title, there is a 'Full Description' section with the following text: 'This course is in person. This course is designated for DoD Agency Program Coordinators (APCs) or Component Program Managers (CPM) only. Note: Participants must bring their CitiManager User IDs and Passwords to class. User IDs and Passwords are required for class participation, as the Citi trainer is not authorized to grant access to the applications. This User ID and Password will be used to log into the following website: www.citimanager.com/login. If you do not have a User ID and Password to log into the link above, please contact your upper level APC. Training consists of an 8-hour hands-on classroom session with intermittent breaks, and including a one-hour scheduled lunch. Participants will learn the basics of operating and navigating CitiManager, Transaction Management, and CitiManager Reporting. All participants are encouraged to interact with our Training Specialists, and fully participate in classroom discussions. This course will cover basic Citibank Reporting - including scheduling reports and report editing. We will also cover card management functions, including card activation/deactivation, opening and closing accounts, account transfers, credit and cash limit maintenance and a host of other functions.'</p>	<p>4. Click the Register button.</p> <p><i>The Activity Registration screen displays.</i></p> <p>Note: If you have previously attended this class, the Register Again button displays.</p>

Instructor Led Course — Register

Screen	Step/Action
	<ol style="list-style-type: none"> 5. Click the ADD button for the desired date. 6. Click the Register button. <p><i>The Activities screen displays and a confirmation message displays at the top of the screen.</i></p>
Add — Register	

Cancel Registration for Instructor Led Webinar and In-Person Training

Screen	Step/Action
<p>Learning Center Home Screen — To Do</p>	<p>1. From the Learning Center Home screen To Do list, click the drop-down arrow on the View Details button for the training you wish to cancel then click Cancel Registration.</p> <p><i>The Cancellation Confirmation screen displays.</i></p>
<p>Cancel Registration</p>	<p>2. Click the Confirm Cancellation button.</p> <p><i>The dashboard redisplay and the training has been removed from your To Do list.</i></p>

Open a Reference Document

Screen	Step/Action
<p>Learning Center Home Screen</p>	<ol style="list-style-type: none"> From the Learning Center Home screen, click the Catalog Topic to view an unfiltered list of that topic's training resources and courses that will not be sorted by activity type. <p>OR</p> <p>To search for a specific reference document, in the Search field type your search criteria.</p> <p>OR</p> <p>Click the Library icon to view a filtered list of training resources and courses that is sorted by activity type.</p> <p>In this example, we will use the Library icon.</p> <p><i>A list of library topics display on the left.</i></p>
<p>Learning Center — Library</p>	<ol style="list-style-type: none"> Click the arrow next to the topic name to view a filtered list of training resources and courses by activity type, for example Computer Based Trainings, Reference Documents and Instructor Led Webinars. <p>Note: If the topic name is clicked, training resources and courses will display to the right in an unfiltered list that are not sorted by activity type.</p>

Screen	Step/Action
	<p>3. Click Reference Documents.</p> <p><i>The documents display to the right.</i></p>
	<p>4. To view a document, click the ellipsis (...) to the right of the activity you wish to view then click Start.</p> <p><i>The document will open in a new window.</i></p> <p>Note: If a popup blocker message displays, click Start.</p>

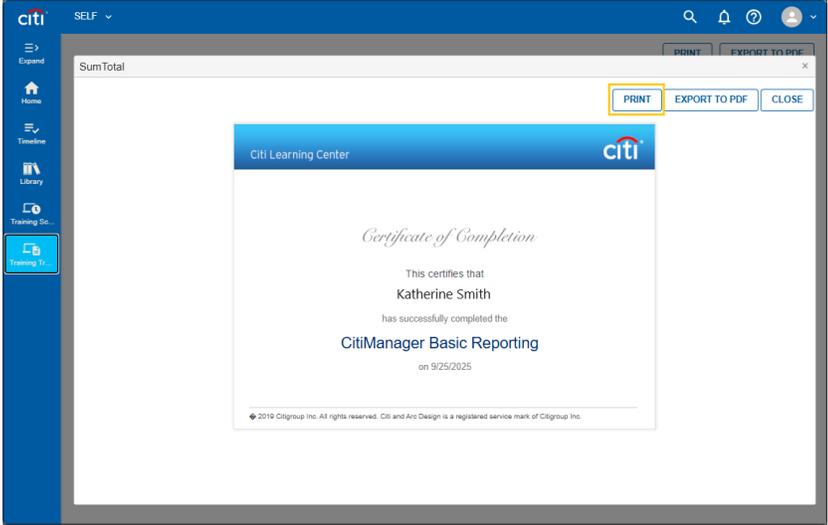
Learning Center — Reference Documents

Select Activity and Start

Print Certificate of Completion

Once you have completed a course or viewed a reference document, it will appear on your transcript and you may print a Certificate of Completion.

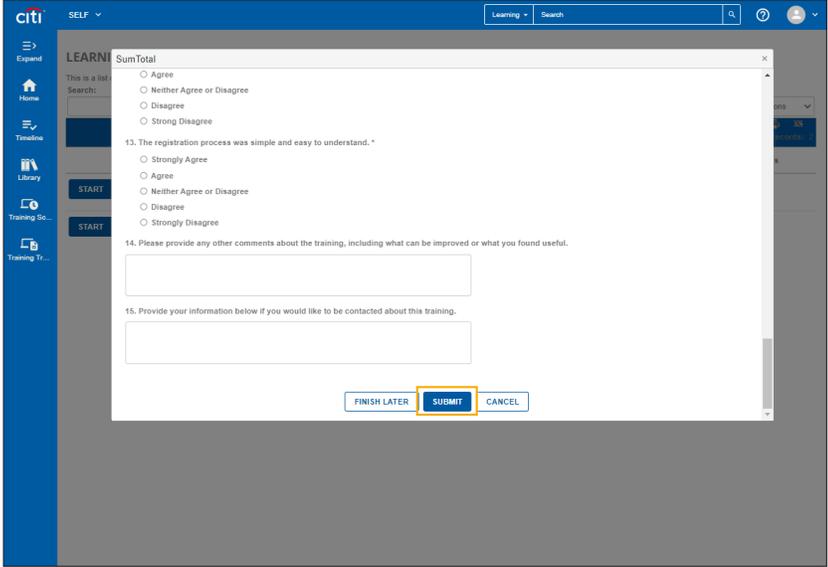
Screen	Step/Action																		
<p>Learning Center Home Screen</p>	<p>1. From the Learning Center Home screen, click the Training Transcript link on the side navigation bar.</p> <p><i>The Training Transcript screen displays.</i></p>																		
<p>Training Transcript</p> <table border="1"> <thead> <tr> <th>Activity</th> <th>Estimated Credit Hours</th> <th>Start Date</th> <th>Completion Date</th> <th>Score</th> <th>Attended Duration</th> </tr> </thead> <tbody> <tr> <td>CitiManager Basic Reporting</td> <td></td> <td>9/8/2025</td> <td>9/25/2025</td> <td></td> <td>Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 42</td> </tr> <tr> <td>CitiManager: Entitlement User Guide</td> <td></td> <td>10/9/2024</td> <td>10/9/2024</td> <td></td> <td>Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 1</td> </tr> </tbody> </table>	Activity	Estimated Credit Hours	Start Date	Completion Date	Score	Attended Duration	CitiManager Basic Reporting		9/8/2025	9/25/2025		Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 42	CitiManager: Entitlement User Guide		10/9/2024	10/9/2024		Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 1	<p>2. To view a Certificate of Completion, click the Diploma icon for the desired activity.</p> <p><i>The Certificate of Completion opens in a small window.</i></p>
Activity	Estimated Credit Hours	Start Date	Completion Date	Score	Attended Duration														
CitiManager Basic Reporting		9/8/2025	9/25/2025		Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 42														
CitiManager: Entitlement User Guide		10/9/2024	10/9/2024		Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 1														

Screen	Step/Action
 <p>Certificate of Completion — Print</p>	<ol style="list-style-type: none"> To print a Certificate of Completion, click the Print button. <i>The Print window opens.</i> Select a printer and click the Print button. <i>The Certificate of Completion is printed on the selected printer.</i> When you are finished, click the Close button.

Complete Training Surveys

Once you have complete an Instructor-Led Webinar and the trainer has marked you as complete, you are assigned a training survey which can be accessed from the **Training Surveys** section or the **Task** link in the **To Do** section on the Learning Center **Home** screen.

Screen	Step/Action										
<p>Learning Center Home Screen</p>	<p>1. From the Learning Center Home screen, click the Task link in the To Do section or the Pending Activity Evaluation link in the Training Surveys section.</p> <p>Note: If you click the Task link in the To Do section you will need to click the Start button.</p> <p><i>The Learning Activity Evaluations screen displays.</i></p>										
<p>Learning Activity Evaluation</p> <table border="1"> <thead> <tr> <th>Evaluation Name</th> <th>Activity Name</th> <th>Code</th> <th>Due Date</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>GSA Training Evaluation</td> <td>DoD Travel: CitManager Basic, June 30, 2025</td> <td>DoD Travel: CitManager Basic, June 30, 2025</td> <td>June 30, 2025</td> <td>New</td> </tr> </tbody> </table>	Evaluation Name	Activity Name	Code	Due Date	Status	GSA Training Evaluation	DoD Travel: CitManager Basic, June 30, 2025	DoD Travel: CitManager Basic, June 30, 2025	June 30, 2025	New	<p>2. Click the Start button.</p> <p><i>The Evaluation displays.</i></p>
Evaluation Name	Activity Name	Code	Due Date	Status							
GSA Training Evaluation	DoD Travel: CitManager Basic, June 30, 2025	DoD Travel: CitManager Basic, June 30, 2025	June 30, 2025	New							

Screen	Step/Action
 <p>Evaluation</p>	<p>3. Complete the Evaluation and click the Submit button.</p>

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