

Learning Center

Quick Reference Guide

Commercial Cards

June 2025

Treasury and Trade Solutions





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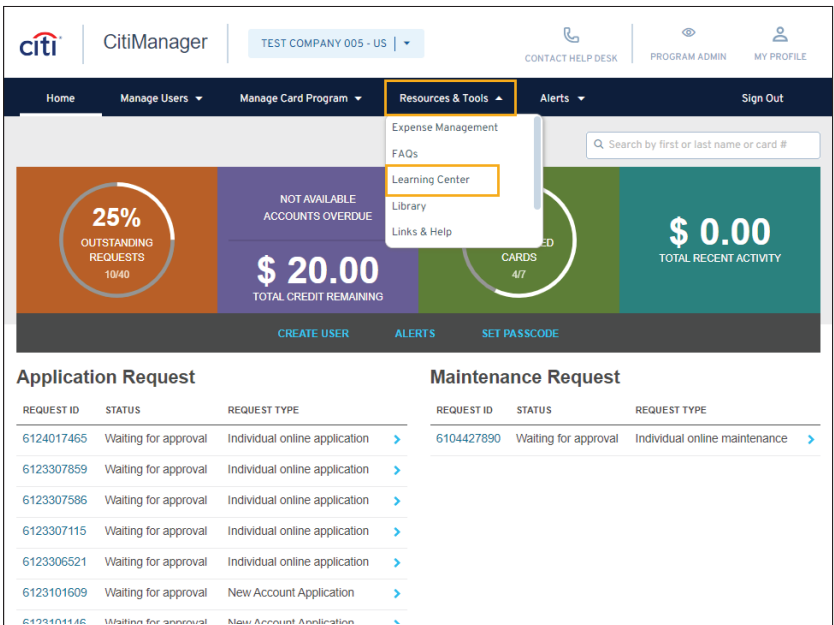
Learning Center Overview

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

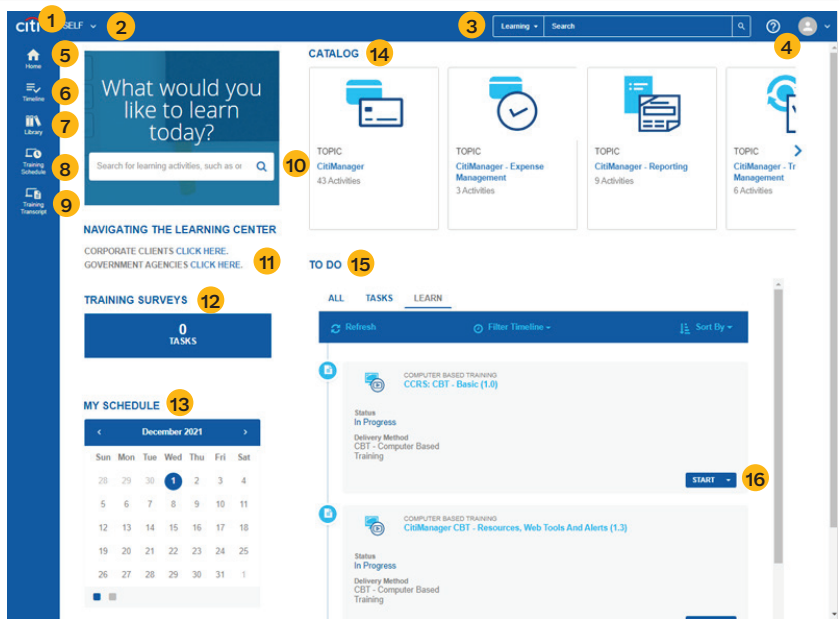
The Learning Center provides on-demand, self-paced training so you can complete computer-based training and access reference documents at any time. If you need to exit a course prior to completion, you can access it again and begin where you left off. You can also register for instructor-led webinars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

Access the Learning Center

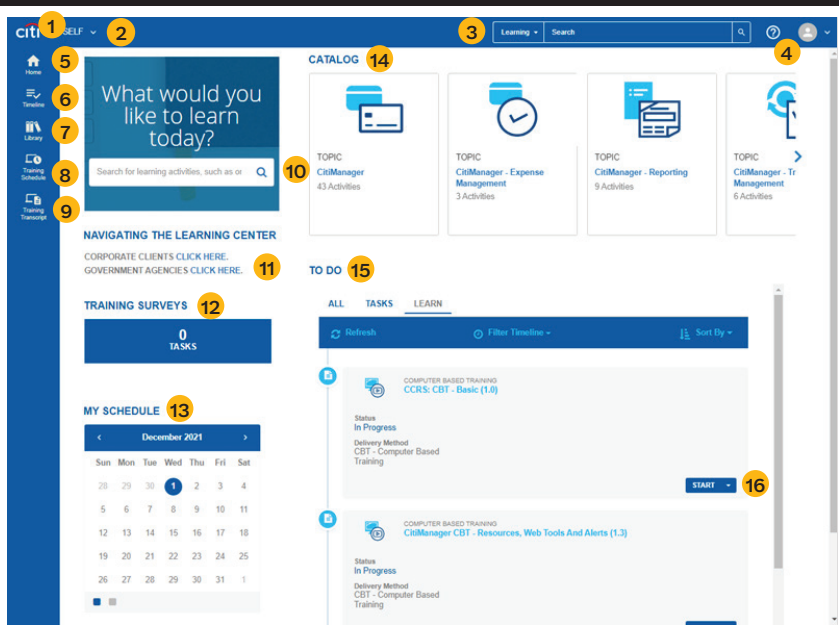
If you have a Cardholder and Non-cardholder login for different companies, you will need to set the Non-cardholder company as your primary company in order to access the Learning center. To change your primary company, click the **My Profile** link that displays at the top of the screen. When **My Profile** 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>Application Request</p> <table><tr><th>REQUEST ID</th><th>STATUS</th><th>REQUEST TYPE</th></tr><tr><td>6124017465</td><td>Waiting for approval</td><td>Individual online application</td></tr><tr><td>6123307859</td><td>Waiting for approval</td><td>Individual online application</td></tr><tr><td>6123307586</td><td>Waiting for approval</td><td>Individual online application</td></tr><tr><td>6123307115</td><td>Waiting for approval</td><td>Individual online application</td></tr><tr><td>6123306521</td><td>Waiting for approval</td><td>Individual online application</td></tr><tr><td>6123101609</td><td>Waiting for approval</td><td>New Account Application</td></tr><tr><td>6123101146</td><td>Waiting for approval</td><td>New Account Application</td></tr></table> <p>Maintenance Request</p> <table><tr><th>REQUEST ID</th><th>STATUS</th><th>REQUEST TYPE</th></tr><tr><td>6104427890</td><td>Waiting for approval</td><td>Individual online maintenance</td></tr></table>	REQUEST ID	STATUS	REQUEST TYPE	6124017465	Waiting for approval	Individual online application	6123307859	Waiting for approval	Individual online application	6123307586	Waiting for approval	Individual online application	6123307115	Waiting for approval	Individual online application	6123306521	Waiting for approval	Individual online application	6123101609	Waiting for approval	New Account Application	6123101146	Waiting for approval	New Account Application	REQUEST ID	STATUS	REQUEST TYPE	6104427890	Waiting for approval	Individual online maintenance	<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>
REQUEST ID	STATUS	REQUEST TYPE																													
6124017465	Waiting for approval	Individual online application																													
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Learning Center Navigation

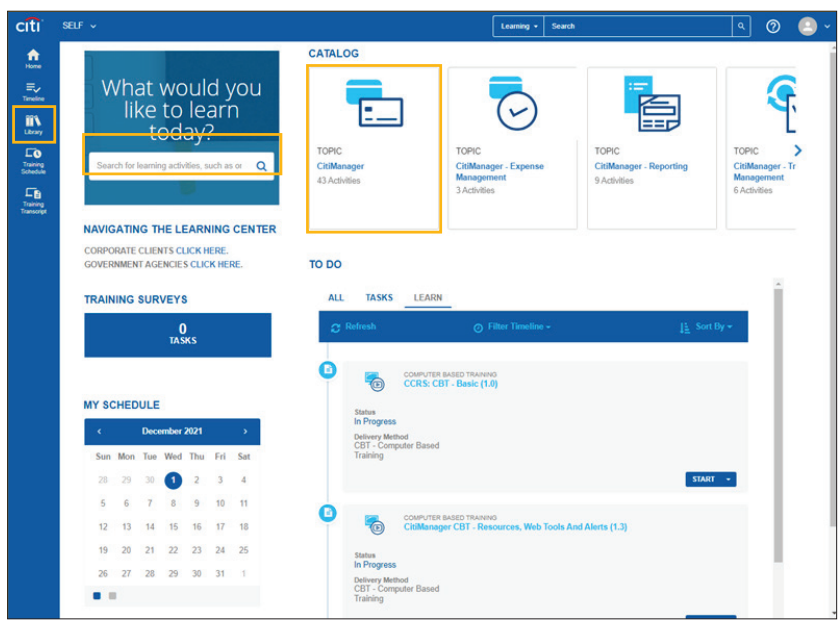
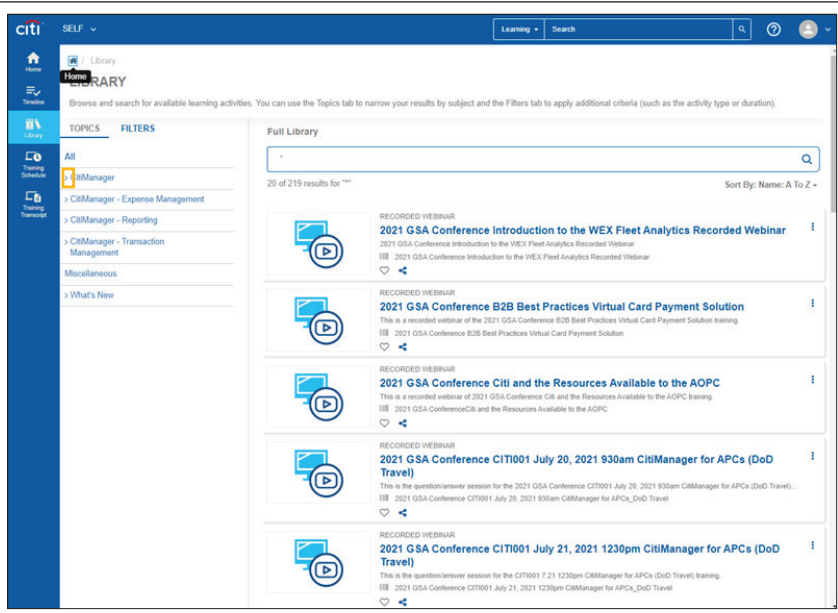
Screen	Description
 <p>The screenshot shows the Learning Center Home Screen. It features a top navigation bar with the Citi logo (1), a 'SELF' dropdown menu (2), a 'Learning' tab (3), and a search field (4). On the left, there is a sidebar with icons for Home (5), Timeline (6), Library (7), Training Schedule (8), and Training Transcript (9). The main content area includes a 'What would you like to learn today?' prompt (10), a 'CATALOG' section with various topics (14), a 'TO DO' section (15), and a 'MY SCHEDULE' calendar (13). There are also links for 'NAVIGATING THE LEARNING CENTER' (11) and 'TRAINING SURVEYS' (12). A 'START' button is visible on the right side of the main content area (16).</p>	<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.

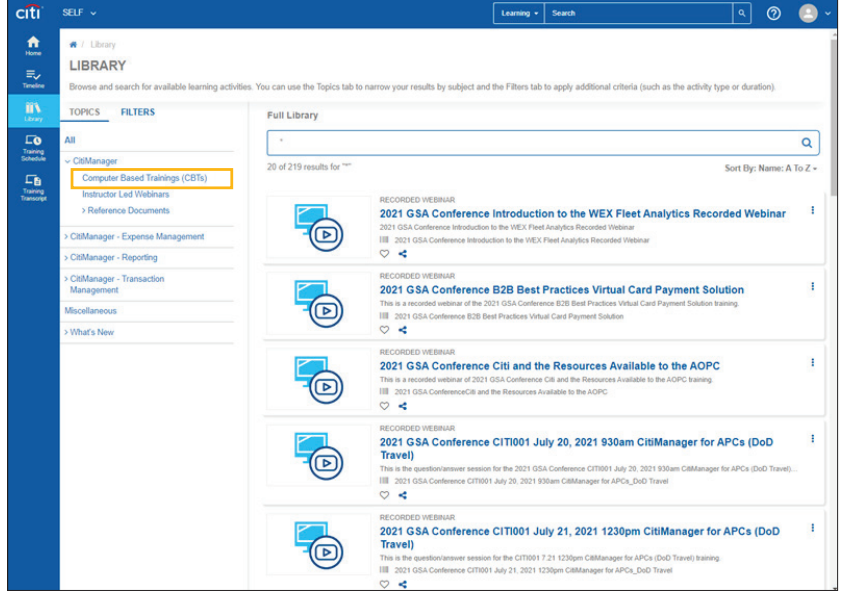
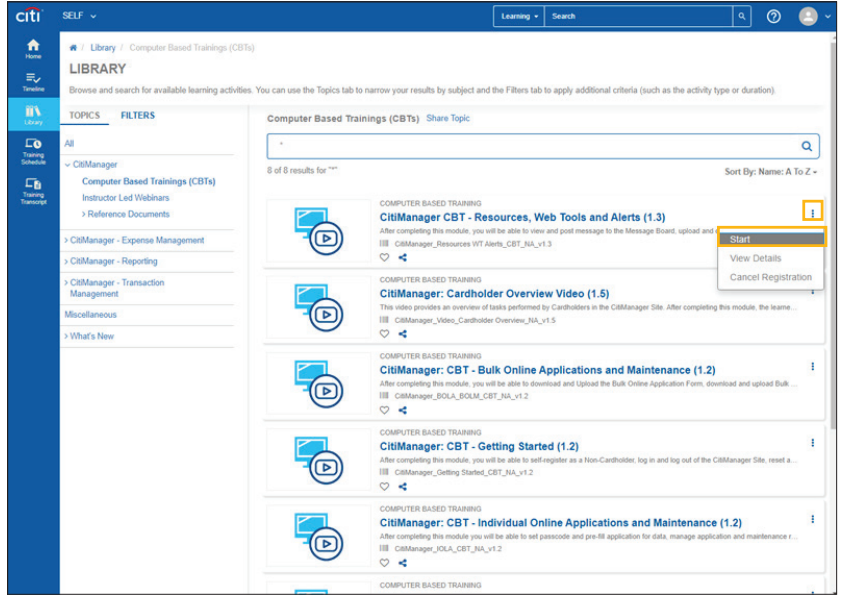
Learning Center Home Screen

Screen	Description
 <p>The screenshot shows the Learning Center Home Screen. It features a top navigation bar with a 'Learning' dropdown and a search bar. On the left, there is a sidebar with icons for Home, Training Library, and Training Tools. The main content area includes a 'What would you like to learn today?' section with a search bar, a 'CATALOG' section with four topic cards (CitiManager, CitiManager - Expense Management, CitiManager - Reporting, and CitiManager - Training Management), a 'TO DO' section with a list of tasks, and a 'MY SCHEDULE' section with a calendar view. Numbered callouts (1-16) point to various elements: 1. Citi logo, 2. Learning dropdown, 3. Search bar, 4. User profile icon, 5. Home icon, 6. Training Library icon, 7. Training Tools icon, 8. Search bar, 9. What would you like to learn today? section, 10. CATALOG section, 11. TO DO section, 12. MY SCHEDULE section, 13. My Schedule calendar, 14. Catalog topic links, 15. To Do list, and 16. Start button.</p>	<p>13. My Schedule — Click on the calendar dates for a quick glance of your upcoming trainings.</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>

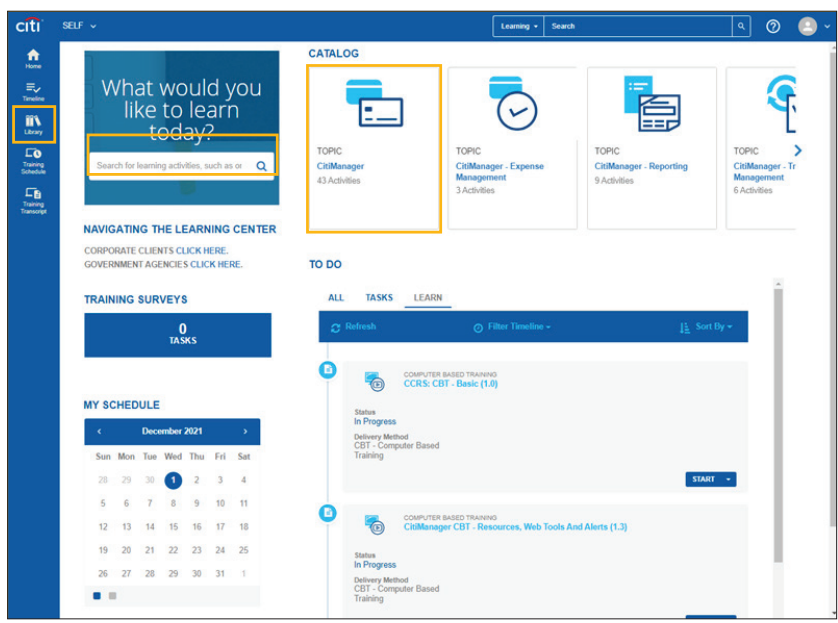
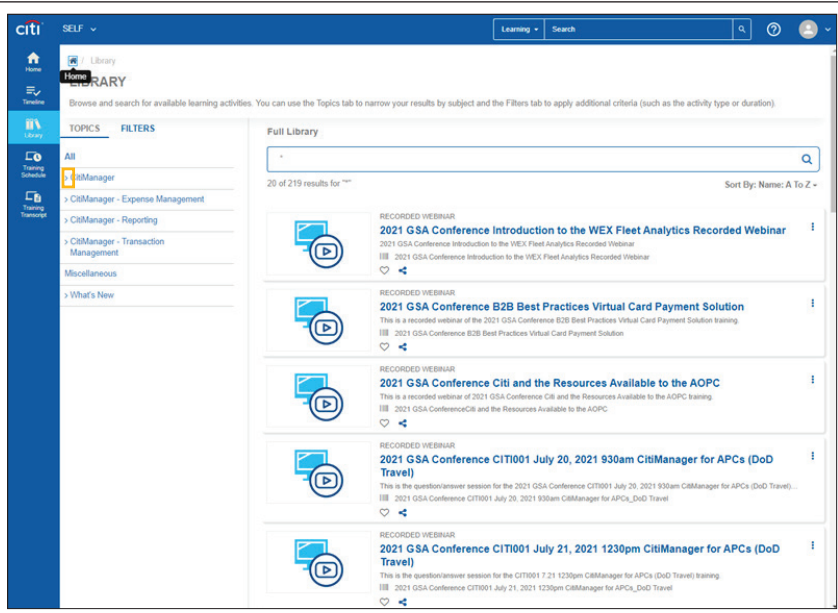
Learning Center Home Screen

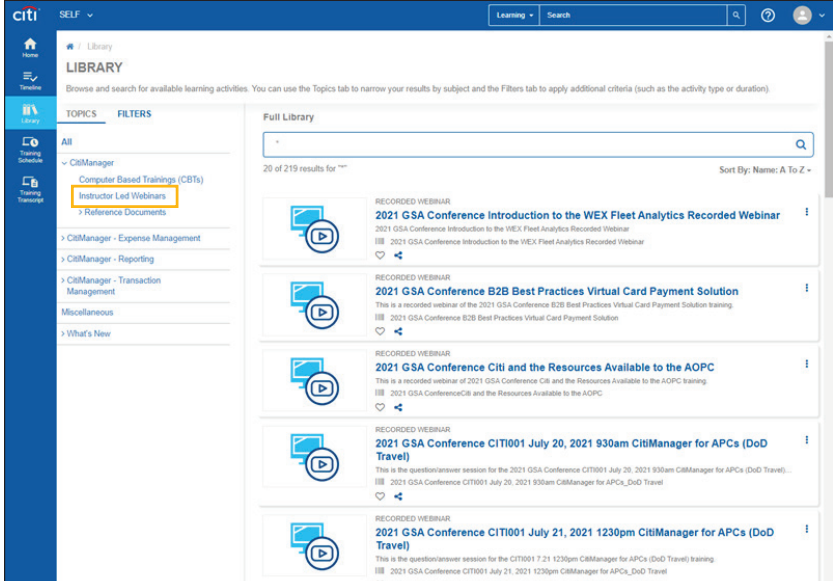
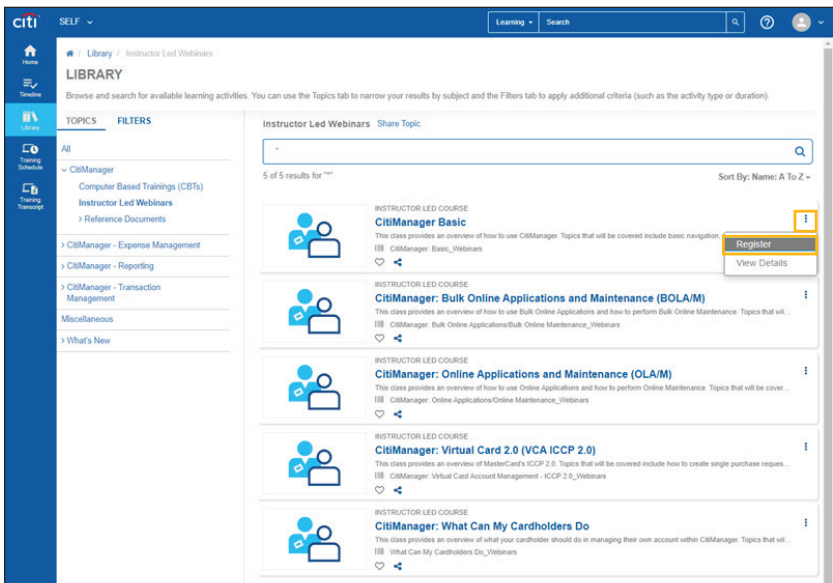
View a Computer Based Training

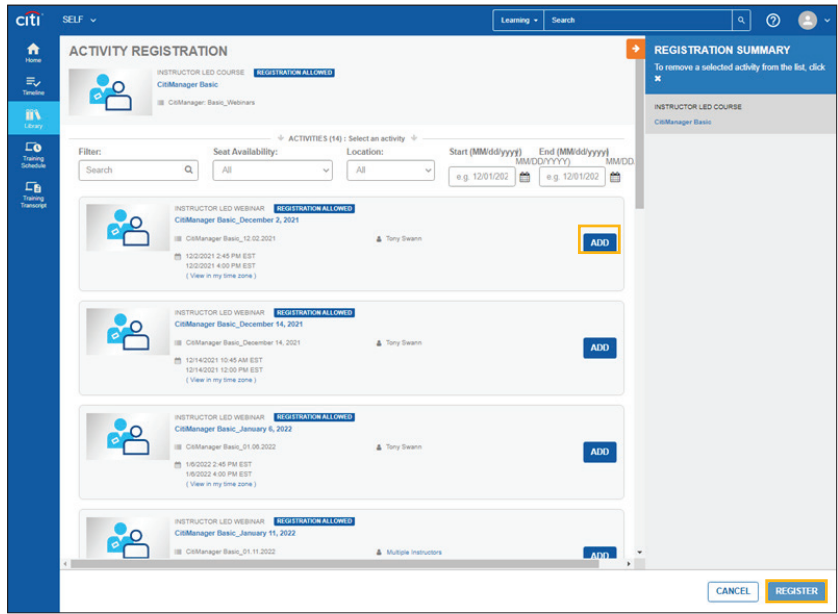
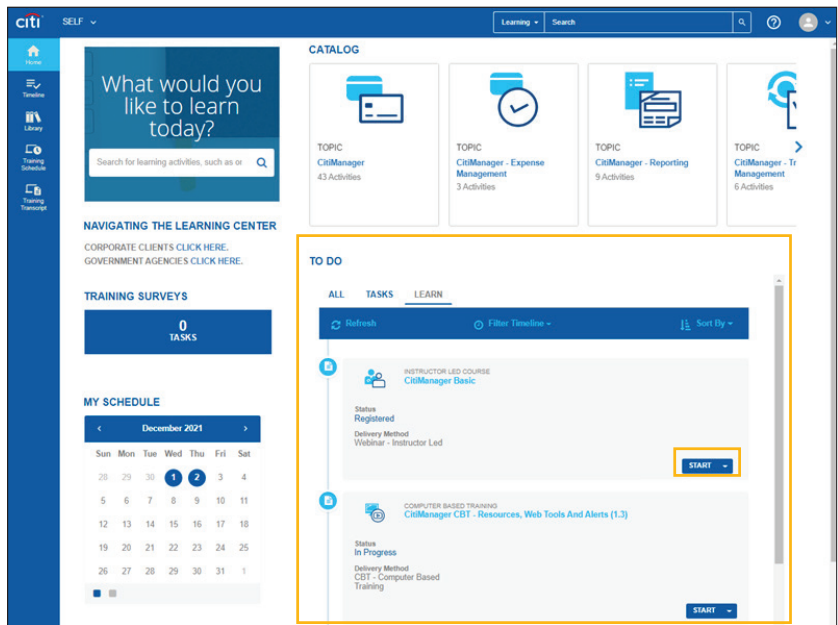
Screen	Step/Action
 <p>The screenshot shows the Learning Center Home screen. On the left sidebar, the 'Library' icon is highlighted with a yellow box. The main content area features a 'What would you like to learn today?' search bar, a 'CATALOG' section with four topic cards (CitiManager, Expense Management, Reporting, and Transaction Management), and a 'TO DO' section with a list of tasks. A 'MY SCHEDULE' calendar is also visible on the left.</p>	<ol style="list-style-type: none"> 1. 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 computer-based training, 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 Library icon. <i>A list of library topics display on the left.</i>
<p>Learning Center Home Screen</p>	
 <p>The screenshot shows the Learning Center Library screen. The left sidebar displays a list of topics under the 'Library' tab, with 'CitiManager' selected. The main content area shows a 'Full Library' search results page with 20 of 219 results. The results are sorted by name (A to Z) and include several recorded webinars from the 2021 GSA Conference.</p>	<ol style="list-style-type: none"> 2. 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.
<p>Learning Center — Library</p>	

Screen	Step/Action
	<p>3. Click Computer Based Trainings (CBTs).</p> <p><i>A list of CitiManager CBTs display to the right.</i></p>
Learning Center — Computer Based Training (CBT)	
	<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 Start.</p>
Select Activity and Start	

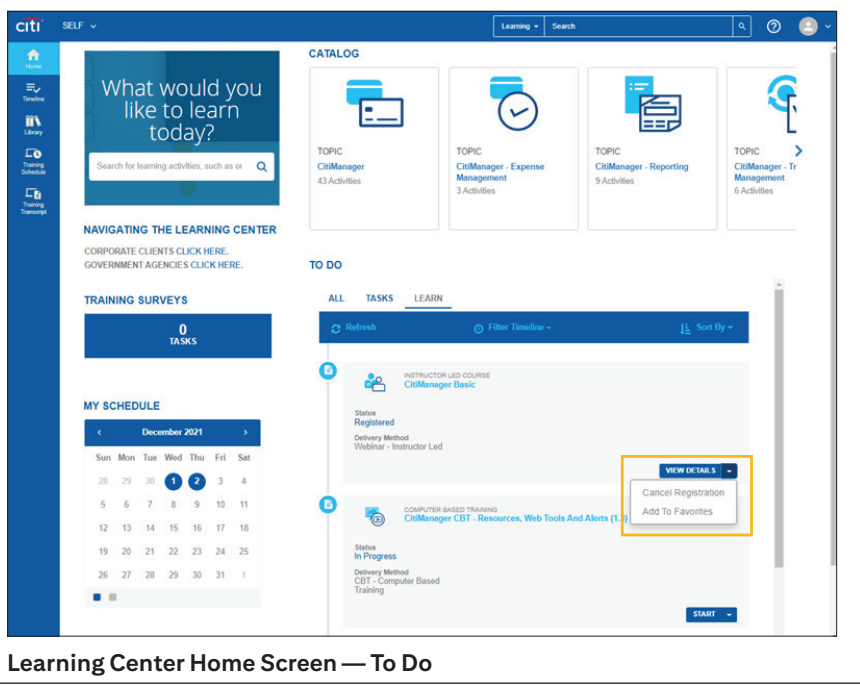
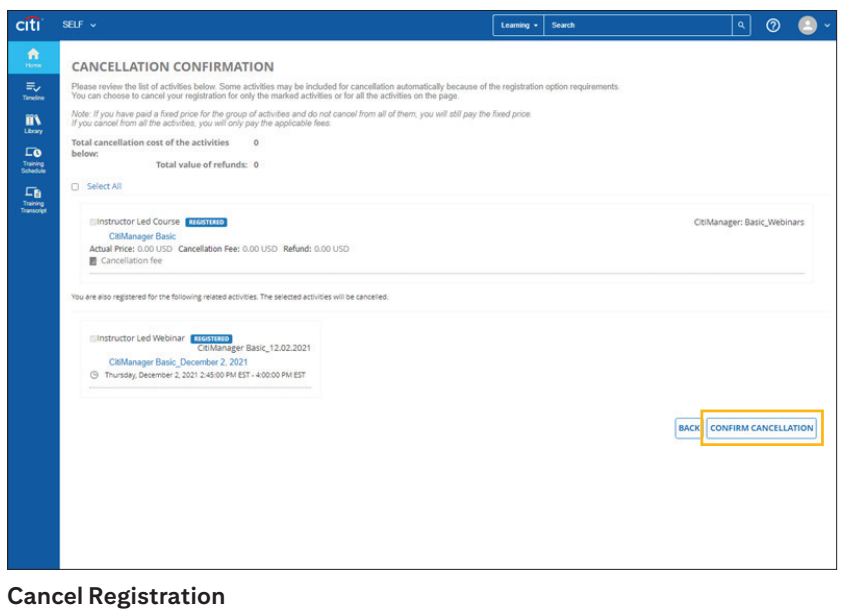
Register for Instructor Led Webinar

Screen	Step/Action
	<ol style="list-style-type: none"> 1. 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 an 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>
Learning Center Home Screen — Instructor Led Webinar	
	<ol style="list-style-type: none"> 2. Click 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.
Learning Center — Library	

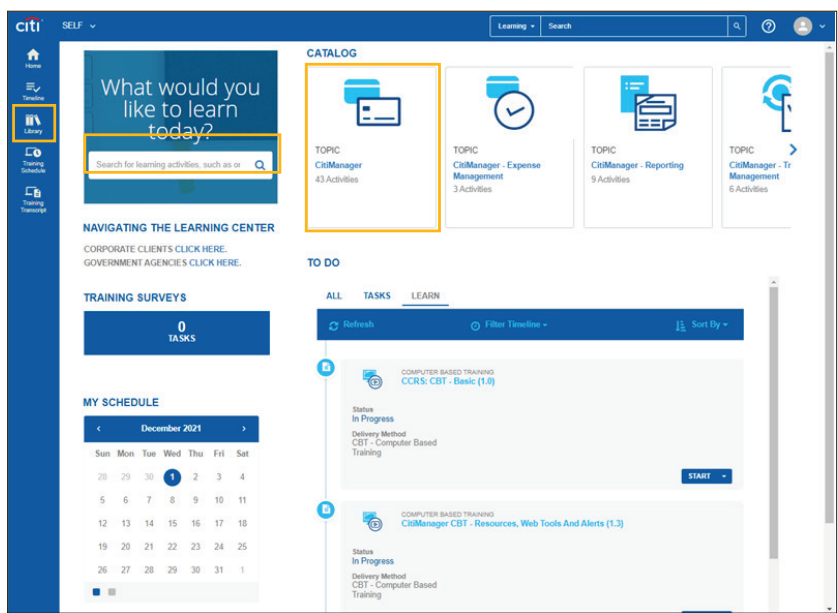
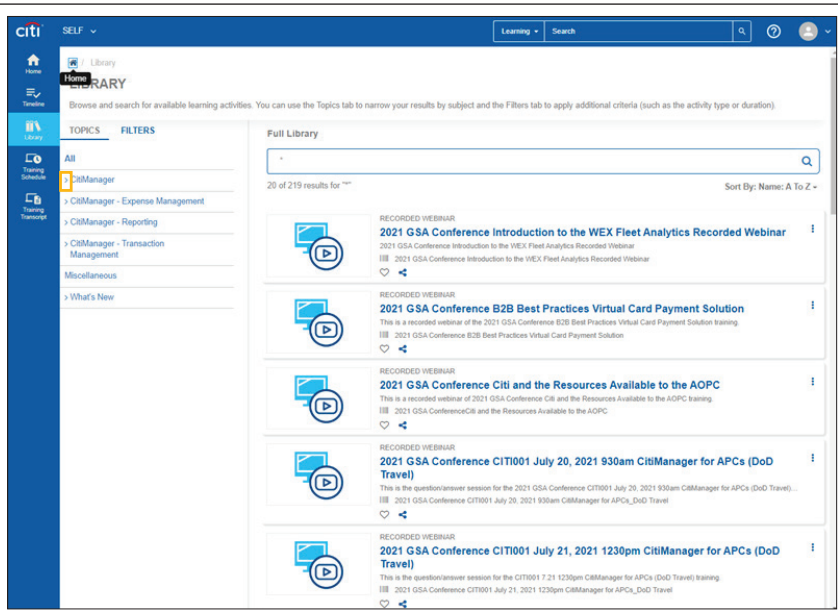
Screen	Step/Action
	<p>3. Select Instructor Led Webinars.</p> <p><i>A list of CitiManager Instructor Led Webinars display to the right.</i></p>
	<p>4. To register for an Instructor Led Webinar, click the ellipsis (...) to the right of the training you wish to register for then click Register.</p> <p><i>The Offerings screen displays.</i></p>
<p>Select and Register</p>	

Screen	Step/Action
	<ol style="list-style-type: none"> Select the ADD button for the desired date. Click the Register button. <p><i>The Activities screen displays with a Registered message.</i></p>
Offerings and Register	
	<ol style="list-style-type: none"> Fifteen minutes prior to the start of the webinar, log back into the Learning Center and click the 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>
Learning Center — To Do	

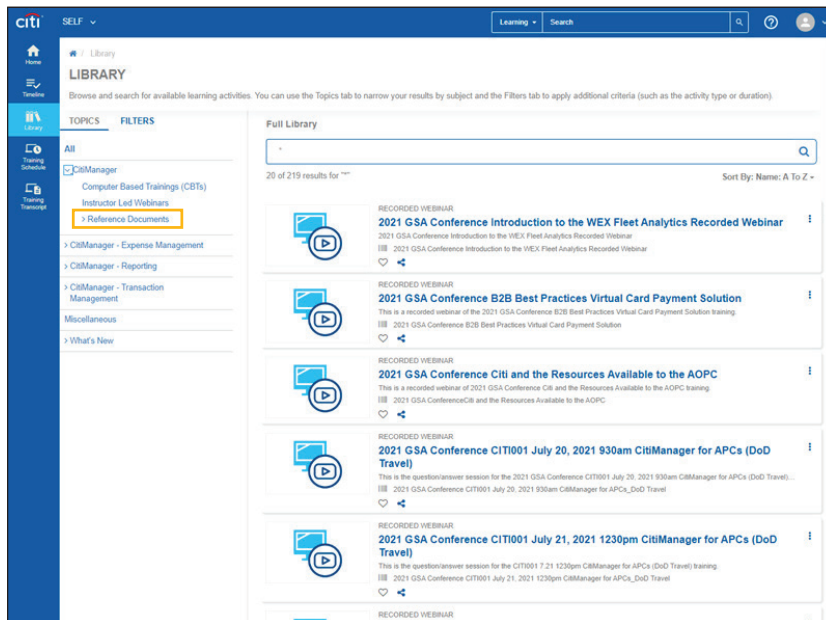
Cancel Registration for Instructor Led Webinar

Screen	Step/Action
 <p>Learning Center Home Screen — To Do</p>	<ol style="list-style-type: none"> From the Learning Center Home screen — To Do list, click the drop-down arrow on the View Details button of the training you wish to cancel then click Cancel Registration. <i>The Cancellation Confirmation screen displays.</i>
 <p>Cancel Registration</p>	<ol style="list-style-type: none"> Click the Confirm Cancellation button. <i>The dashboard redisplay and the training has been removed from your To do list.</i>

Open a Reference Document

Screen	Step/Action
 <p>The Learning Center Home Screen displays a navigation menu on the left with icons for Home, Topics, Library, Training Schedule, and Training Resources. The main content area includes a 'What would you like to learn today?' search bar, a 'CATALOG' section with topic cards (e.g., CitiManager, Expense Management, Reporting, Transaction Management), a 'NAVIGATING THE LEARNING CENTER' section, 'TRAINING SURVEYS' with 0 tasks, and a 'MY SCHEDULE' calendar for December 2021. A 'TO DO' section lists tasks like 'COMPUTER BASED TRAINING CCRS, CBT - Basic (1.0)' and 'COMPUTER BASED TRAINING CitiManager CBT - Resources, Web Tools And Alerts (1.3)'.</p>	<ol style="list-style-type: none"> 1. 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>The Learning Center Library screen shows a 'Full Library' view with 20 of 219 results. The left sidebar lists topics like CitiManager, Expense Management, Reporting, Transaction Management, and Miscellaneous. The main content area displays a list of recorded webinars, including '2021 GSA Conference Introduction to the WEX Fleet Analytics Recorded Webinar', '2021 GSA Conference B2B Best Practices Virtual Card Payment Solution', '2021 GSA Conference Citi and the Resources Available to the AOPC', '2021 GSA Conference CITI001 July 20, 2021 930am CitiManager for APCs (DoD Travel)', and '2021 GSA Conference CITI001 July 21, 2021 1230pm CitiManager for APCs (DoD Travel)'.</p>	<ol style="list-style-type: none"> 2. 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

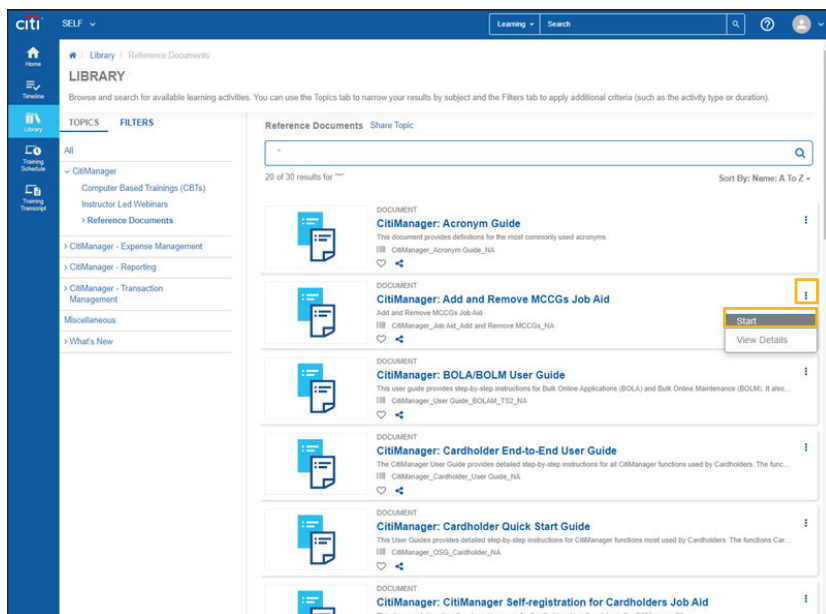


Step/Action

3. Select Reference Documents.

The documents display to the right.

Reference Documents


4. To view a document, click the ellipsis (...) to the right of the activity you wish to view then click **Start**.

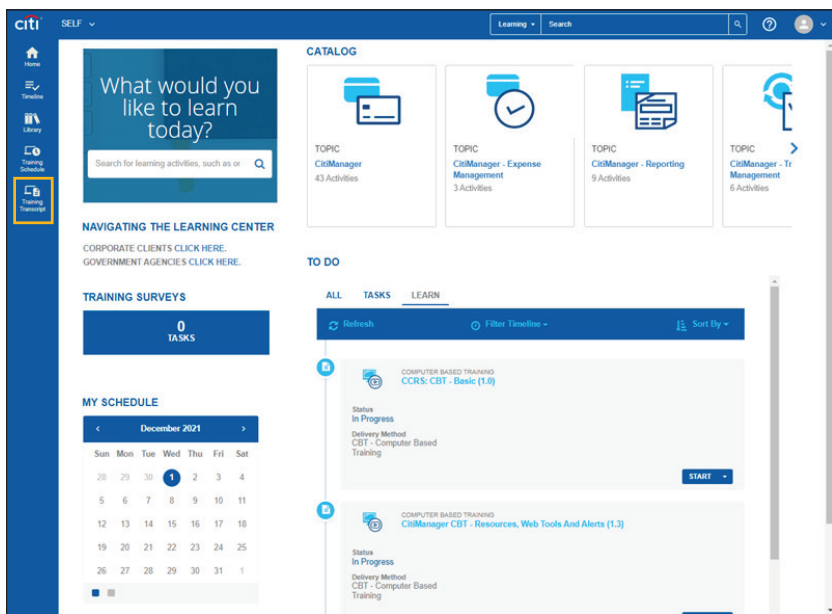
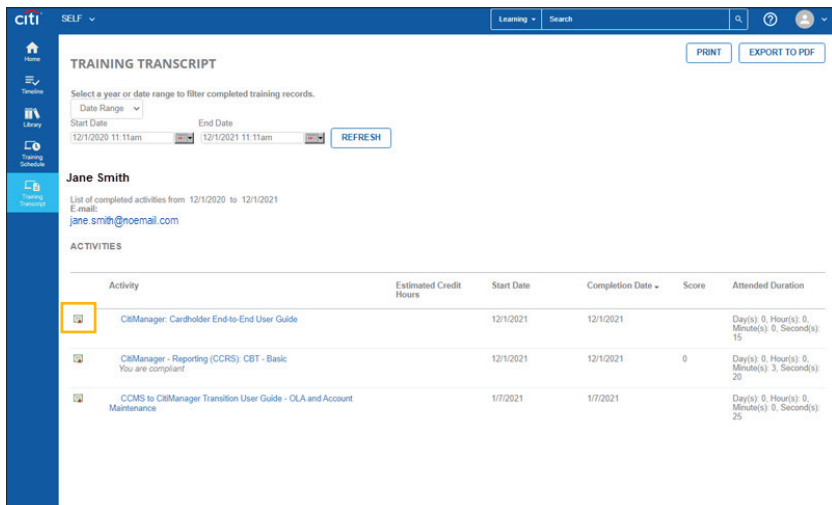
The document will open in a new window.

Note: If a popup blocker message displays, click **Start**.

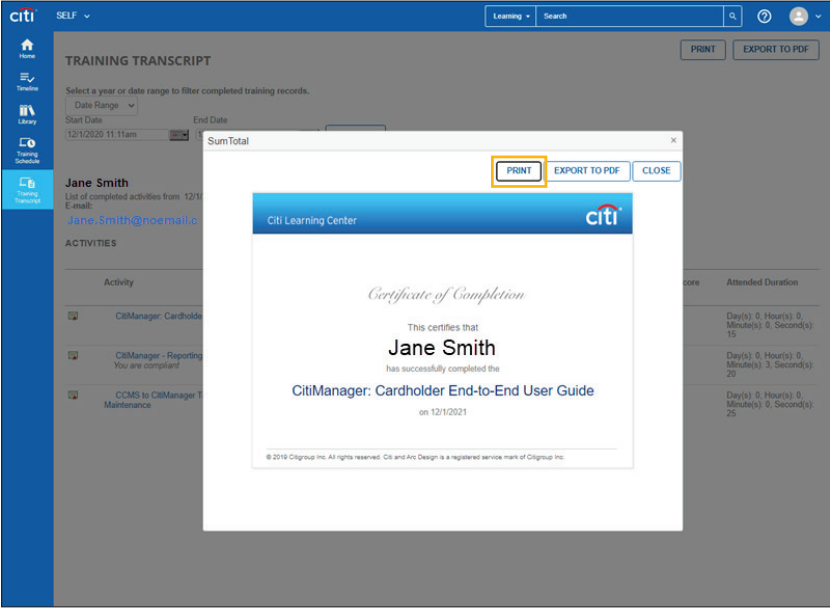
Select Activity and Start

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>	<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>

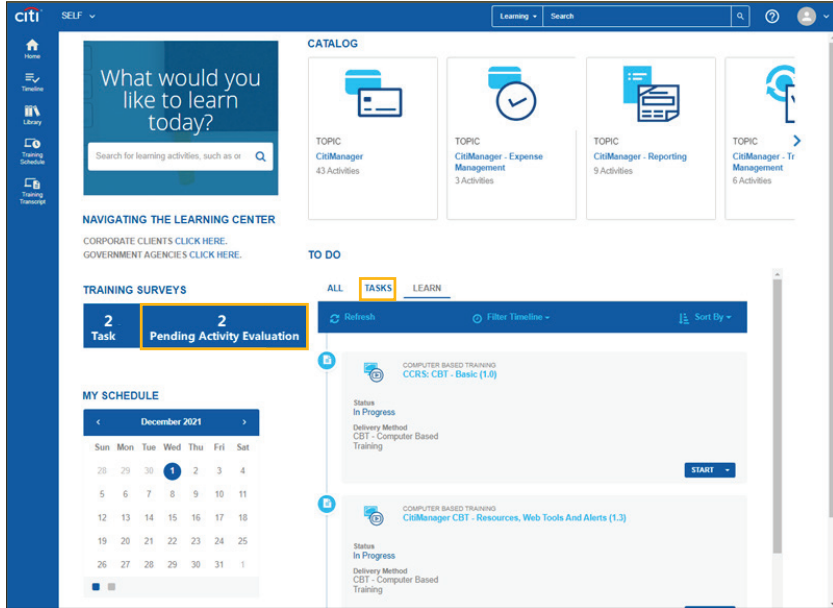
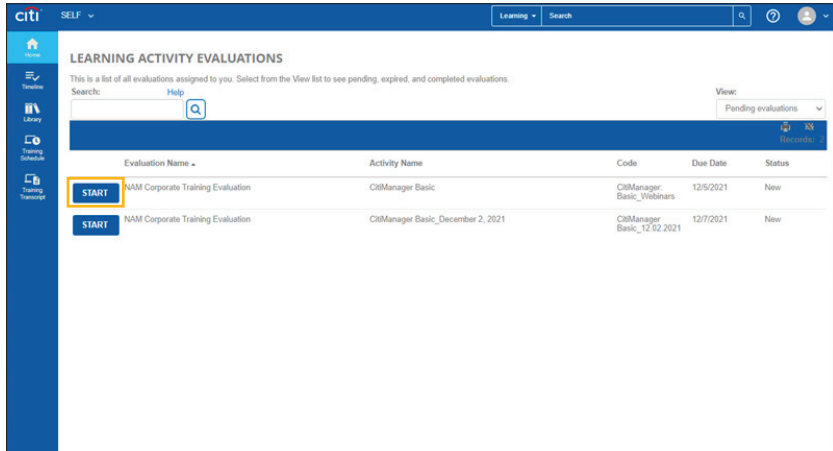


Screen	Step/Action
	<div>3. To print a Certificate of Completion, click the Print button.</div> <div><i>The Print window opens.</i></div> <div>4. Select a printer and click the Print button.</div> <div><i>The Certificate of Completion is printed on the selected printer.</i></div> <div>5. When you are finished, click the Close button.</div>

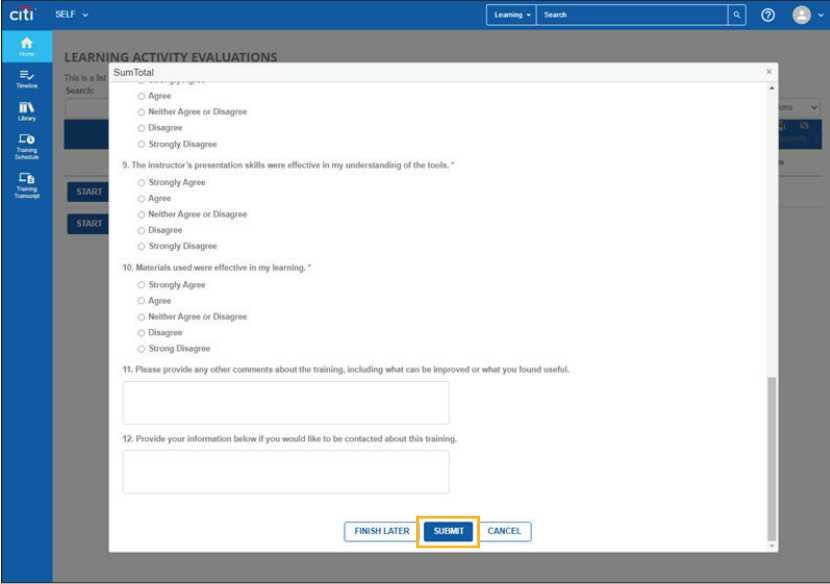
Certificate of Completion — Print

Complete Training Surveys

Once you have completed an Instructor-Led Webinar and the trainer has marked you as complete, you will be 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>	<ol style="list-style-type: none"> From the Learning Center Home screen, click the Task link in the To Do section or the Pending Activity Evaluation link on the Training Surveys section. Note: If you click the Task link in the To Do section you will need to click the Start button. <i>The Learning Activity Evaluations screen displays.</i>
 <p>Learning Activity Evaluation</p>	<ol style="list-style-type: none"> Click the Start button <i>The Evaluation displays.</i>



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

