

Learning Center

Quick Reference Guide

Commercial Cards

October 2022



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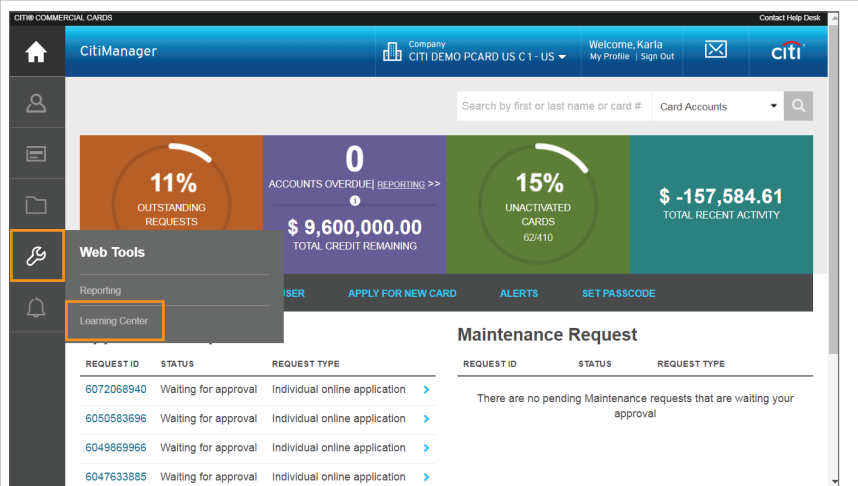
Learning Center Overview

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 side navigation bar, position your mouse over the Web Tools icon and click the Learning Center link. <i>The Learning Center Home screen displays.</i>

Learning Center Navigation

Screen	Description
	<ol style="list-style-type: none"> 1. Citi Logo – Click the Citi logo to access the Learner Dashboard. 2. Self Menu – Click the Self drop-down arrow to access your dashboards, training transcript and training schedules. 3. 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. 4. Self Icon – Click the Self icon and then the Signout link to sign out. 5. Home Icon – Click the Home icon to return to your Learner Dashboard. 6. Timeline Icon – Click the Timeline icon to access a timeline of your training resources and courses. 7. Library Icon – Click the Library icon to navigate to a library of training resources and courses. 8. Training Schedule – Click the Training Schedule icon to access your upcoming training schedule. 9. Training Transcript – Click the Training Transcript icon to access your training transcript. 10. Search – Enter your search criteria in the text field to search for training resources or courses. 11. Navigating the Learning Center – Click the appropriate link to view the Learning Center Quick Reference Guide. 12. 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>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>
<p>Learning Center Home Screen</p>	

View a Computer Based Training

Screen	Step/Action
	<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 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>
	<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>3. Click Computer Based Trainings (CBTs).</p> <p><i>A list of CitiManager CBTs display to the right.</i></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 Start.</p>

Select Activity and Start

Register for Instructor Led Webinar

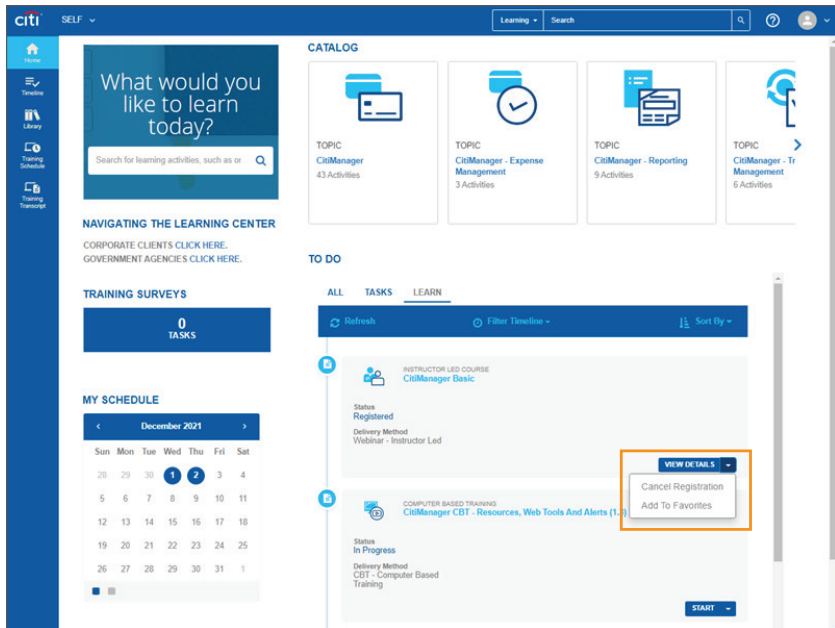
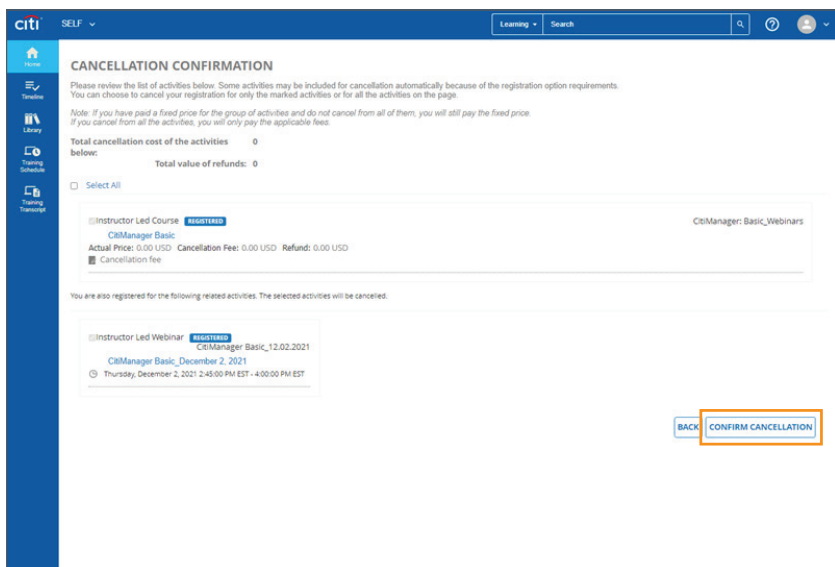
Screen	Step/Action
	<ol style="list-style-type: none"> From the Learning Center Home screen, click the Catalog Topic to view an unfiltered list of that topic's training resources and courses that will not be sorted by activity type. OR To search for an instructor led webinar, in the Search field type 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>
<p>Learning Center Home Screen – Instructor Led Webinar</p>	
	<ol style="list-style-type: none"> 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.
<p>Learning Center – Library</p>	

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>

Select and Register

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>
<p>Offerings and Register</p>	
	<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>
<p>Learning Center – To Do</p>	

Cancel Registration for Instructor Led Webinar

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 of 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>

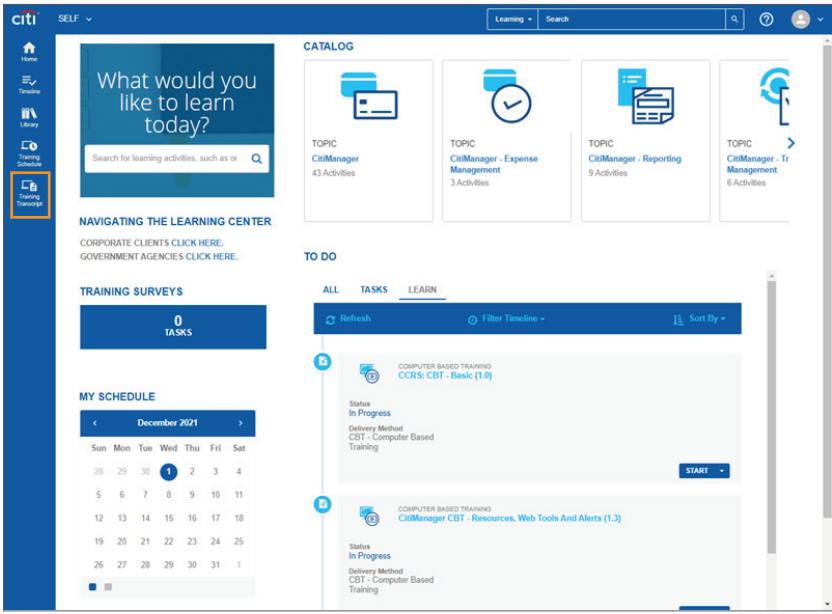
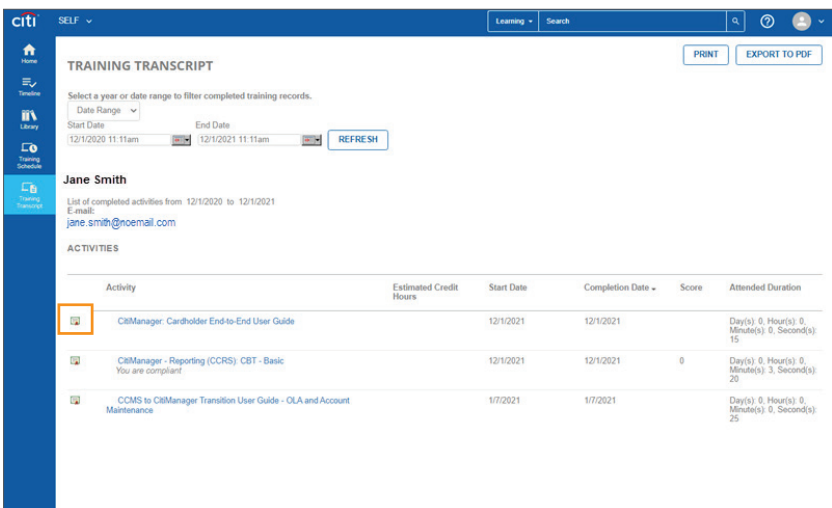









Open a Reference Document

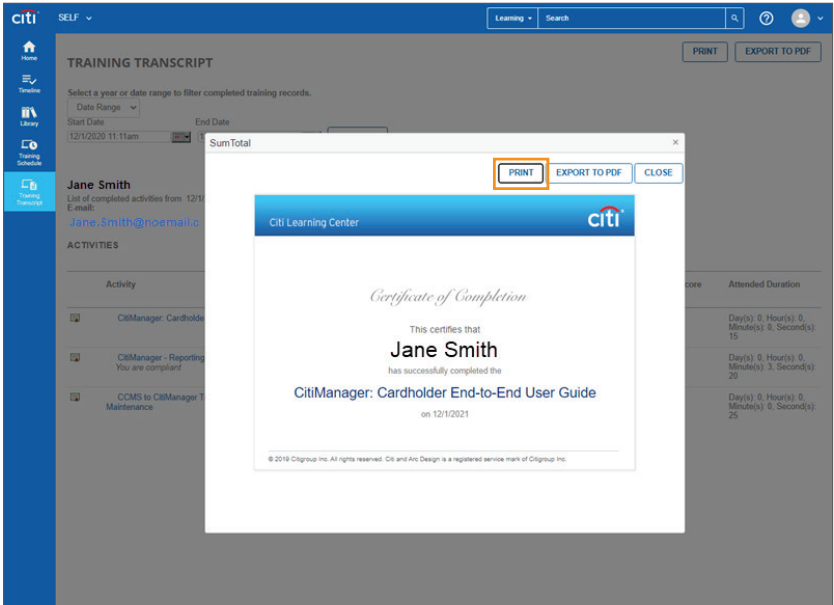
Screen	Step/Action
<p>Learning Center Home Screen</p>	<ol style="list-style-type: none"> From the Learning Center Home screen, click the Catalog Topic to view an unfiltered list of that topic's training resources and courses that will not be sorted by activity type. <p>OR</p> <p>To search for a specific 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>LIBRARY</p> <p>Browse and search for available learning activities. You can use the Topics tab to narrow your results by subject and the Filters tab to apply additional criteria (such as the activity type or duration).</p> <p>TOPICS FILTERS</p> <p>All</p> <p>CitiManager</p> <p>Computer Based Trainings (CBTs)</p> <p>Instructor Led Webinars</p> <p>Reference Documents</p> <p>CitiManager - Expense Management</p> <p>CitiManager - Reporting</p> <p>CitiManager - Transaction Management</p> <p>Miscellaneous</p> <p>What's New</p> <p>Full Library</p> <p>20 of 219 results for ""</p> <p>Sort By: Name: A To Z -</p> <p>RECORDED WEBINAR</p> <p>2021 GSA Conference Introduction to the WEX Fleet Analytics Recorded Webinar</p> <p>2021 GSA Conference Introduction to the WEX Fleet Analytics Recorded Webinar</p> <p>RECORDED WEBINAR</p> <p>2021 GSA Conference B2B Best Practices Virtual Card Payment Solution</p> <p>This is a recorded webinar of the 2021 GSA Conference B2B Best Practices Virtual Card Payment Solution training.</p> <p>RECORDED WEBINAR</p> <p>2021 GSA Conference Citi and the Resources Available to the AOPC</p> <p>This is a recorded webinar of 2021 GSA Conference Citi and the Resources Available to the AOPC training.</p> <p>RECORDED WEBINAR</p> <p>2021 GSA Conference CIT001 July 20, 2021 930am CitiManager for APCs (DoD Travel)</p> <p>This is the question/answer session for the 2021 GSA Conference CIT001 July 20, 2021 930am CitiManager for APCs (DoD Travel) training.</p> <p>RECORDED WEBINAR</p> <p>2021 GSA Conference CIT001 July 21, 2021 1230pm CitiManager for APCs (DoD Travel)</p> <p>This is the question/answer session for the CIT001 7.21 1230pm CitiManager for APCs (DoD Travel) training.</p>	<p>3. Select Reference Documents.</p> <p><i>The documents display to the right.</i></p>
<p>LIBRARY</p> <p>Browse and search for available learning activities. You can use the Topics tab to narrow your results by subject and the Filters tab to apply additional criteria (such as the activity type or duration).</p> <p>TOPICS FILTERS</p> <p>All</p> <p>CitiManager</p> <p>Computer Based Trainings (CBTs)</p> <p>Instructor Led Webinars</p> <p>Reference Documents</p> <p>CitiManager - Expense Management</p> <p>CitiManager - Reporting</p> <p>CitiManager - Transaction Management</p> <p>Miscellaneous</p> <p>What's New</p> <p>Reference Documents</p> <p>Share Topic</p> <p>20 of 30 results for ""</p> <p>Sort By: Name: A To Z -</p> <p>DOCUMENT</p> <p>CitiManager: Acronym Guide</p> <p>This document provides definitions for the most commonly used acronyms.</p> <p>DOCUMENT</p> <p>CitiManager: Add and Remove MCCGs Job Aid</p> <p>Add and Remove MCCGs Job Aid</p> <p>DOCUMENT</p> <p>CitiManager: BOLA/BOLM User Guide</p> <p>This user guide provides step-by-step instructions for Bulk Online Applications (BOLA) and Bulk Online Maintenance (BOLM). It also...</p> <p>DOCUMENT</p> <p>CitiManager: Cardholder End-to-End User Guide</p> <p>The CitiManager User Guide provides detailed step-by-step instructions for all CitiManager functions used by Cardholders. The func...</p> <p>DOCUMENT</p> <p>CitiManager: Cardholder Quick Start Guide</p> <p>This User Guides provides detailed step-by-step instructions for CitiManager functions most used by Cardholders. The functions Car...</p> <p>DOCUMENT</p> <p>CitiManager: CitiManager Self-registration for Cardholders Job Aid</p> <p>This document describes the steps necessary for Cardholders to self-register in the CitiManager Site.</p> <p>Start</p> <p>View Details</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>
<p>Select Activity and Start</p>	

Print Certificate of Completion

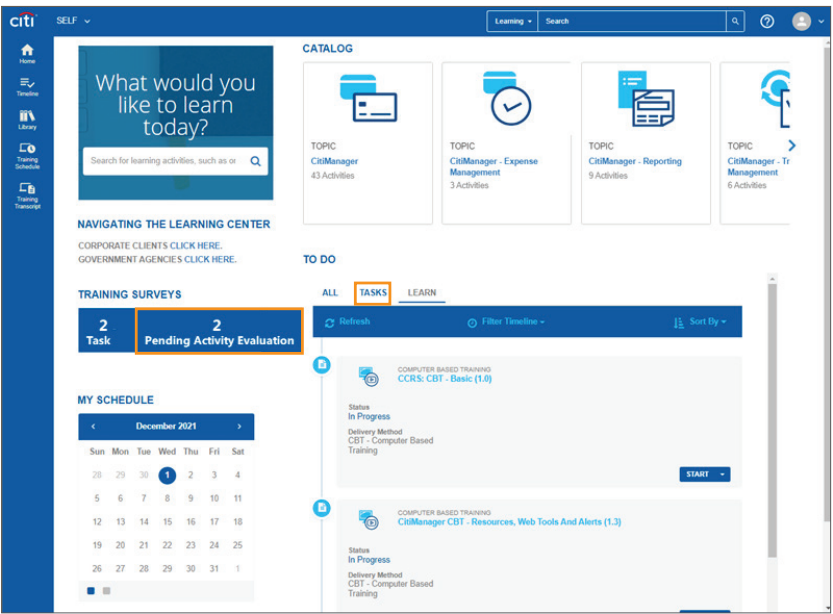
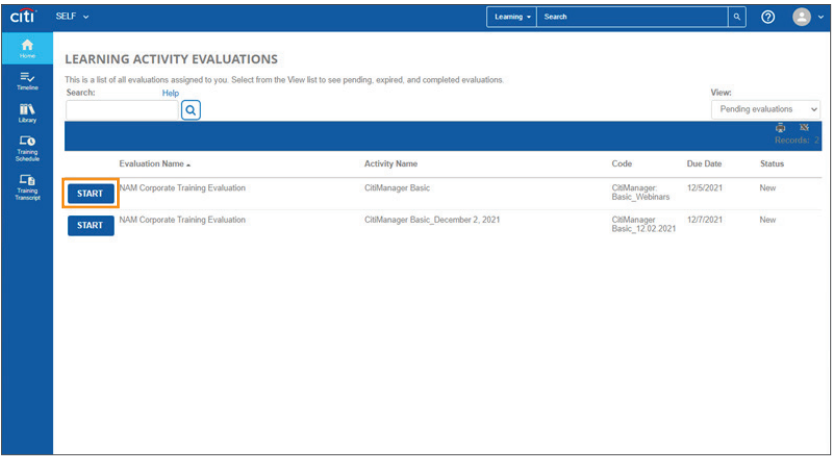
Once you have completed a course or viewed a reference document, it will appear on your transcript and you may print a Certificate of Completion.

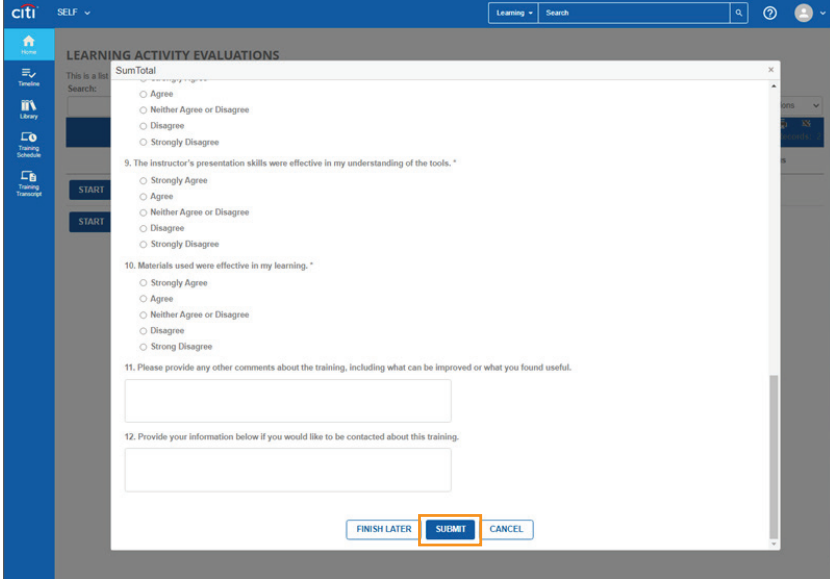
Screen	Step/Action																								
 <p>Learning Center Home Screen</p>	<p>1. From the Learning Center Home screen, click the Training Transcript link on the side navigation bar.</p> <p><i>The Training Transcript screen displays.</i></p>																								
 <p>Training Transcript</p> <p>Select a year or date range to filter completed training records.</p> <p>Date Range: <input type="text"/> Start Date: 12/1/2020 11:11am End Date: 12/1/2021 11:11am <input type="button" value="REFRESH"/></p> <p>Jane Smith List of completed activities from 12/1/2020 to 12/1/2021 E-mail: jane.smith@noemail.com</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: Cardholder End-to-End User Guide</td> <td></td> <td>12/1/2021</td> <td>12/1/2021</td> <td></td> <td>Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 15</td> </tr> <tr> <td> CitiManager - Reporting (CCRS) - CBT - Basic: You are compliant</td> <td></td> <td>12/1/2021</td> <td>12/1/2021</td> <td>0</td> <td>Day(s): 0, Hour(s): 5, Minute(s): 3, Second(s): 20</td> </tr> <tr> <td> CCMS to CitiManager Transition User Guide - OLA and Account Maintenance</td> <td></td> <td>1/7/2021</td> <td>1/7/2021</td> <td></td> <td>Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 25</td> </tr> </tbody> </table> <p>Training Transcript</p>	Activity	Estimated Credit Hours	Start Date	Completion Date	Score	Attended Duration	 CitiManager: Cardholder End-to-End User Guide		12/1/2021	12/1/2021		Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 15	 CitiManager - Reporting (CCRS) - CBT - Basic: You are compliant		12/1/2021	12/1/2021	0	Day(s): 0, Hour(s): 5, Minute(s): 3, Second(s): 20	 CCMS to CitiManager Transition User Guide - OLA and Account Maintenance		1/7/2021	1/7/2021		Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 25	<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: Cardholder End-to-End User Guide		12/1/2021	12/1/2021		Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 15																				
 CitiManager - Reporting (CCRS) - CBT - Basic: You are compliant		12/1/2021	12/1/2021	0	Day(s): 0, Hour(s): 5, Minute(s): 3, Second(s): 20																				
 CCMS to CitiManager Transition User Guide - OLA and Account Maintenance		1/7/2021	1/7/2021		Day(s): 0, Hour(s): 0, Minute(s): 0, Second(s): 25																				

Screen	Step/Action
 <p>The screenshot shows the Citi Learning Center interface. On the left, there is a navigation menu with options like Home, Training, Library, and Training Schedule. The main area displays a 'TRAINING TRANSCRIPT' for Jane Smith, listing completed activities such as 'CitiManager: Cardholder End-to-End User Guide'. A 'Sum Total' window is overlaid on the transcript, showing a 'Certificate of Completion' for Jane Smith. The certificate text reads: 'Citi Learning Center', 'Certificate of Completion', 'This certifies that Jane Smith has successfully completed the CitiManager: Cardholder End-to-End User Guide on 12/1/2021'. The 'PRINT' button in the window is highlighted with a red box.</p>	<ol style="list-style-type: none"> 3. To print a Certificate of Completion, click the Print button. <i>The Print window opens.</i> 4. Select a printer and click the Print button. <i>The Certificate of Completion is printed on the selected printer.</i> 5. When you are finished, click the Close button.
<p>Certificate of Completion – Print</p>	

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> <table border="1" data-bbox="162 1302 917 1386"> <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>NAM Corporate Training Evaluation</td> <td>CitiManager Basic</td> <td>CitiManager_Basic_Webinars</td> <td>12/5/2021</td> <td>New</td> </tr> <tr> <td>NAM Corporate Training Evaluation</td> <td>CitiManager Basic_December 2, 2021</td> <td>CitiManager_Basic_12/02/2021</td> <td>12/7/2021</td> <td>New</td> </tr> </tbody> </table>	Evaluation Name	Activity Name	Code	Due Date	Status	NAM Corporate Training Evaluation	CitiManager Basic	CitiManager_Basic_Webinars	12/5/2021	New	NAM Corporate Training Evaluation	CitiManager Basic_December 2, 2021	CitiManager_Basic_12/02/2021	12/7/2021	New	<ol style="list-style-type: none"> Click the Start button <i>The Evaluation displays.</i>
Evaluation Name	Activity Name	Code	Due Date	Status												
NAM Corporate Training Evaluation	CitiManager Basic	CitiManager_Basic_Webinars	12/5/2021	New												
NAM Corporate Training Evaluation	CitiManager Basic_December 2, 2021	CitiManager_Basic_12/02/2021	12/7/2021	New												

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

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