

# Learning Center

Quick Reference Guide

Commercial Cards

February 2023



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

# Learning Center Navigation

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

Screen	Description
	<p>13. <b>My Schedule</b> – Click on the calendar dates for a quick glance of your upcoming trainings.</p> <p>14. <b>Catalog</b> – 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. <b>To Do</b> – 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 <b>Start</b> button from this list.</p> <p>16. <b>Start/View Details</b> – From your <b>To Do</b> list, click the <b>Start</b> 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 <b>Favorites</b> menu.</p> <p><b>Note:</b> For instructor-led webinars, the <b>View Details</b> button will display until 15 minutes prior to the scheduled start time and then the <b>Start</b> button will display.</p>
<p><b>Learning Center Home Screen</b></p>	

# View a Computer Based Training

Screen	Step/Action
<p><b>Learning Center Home Screen</b></p>	<ol style="list-style-type: none"> <li>From the <b>Learning Center Home</b> screen, click the <b>Catalog Topic</b> to view an unfiltered list of that topic's training resources and courses that will not be sorted by activity type.</li> </ol> <p>OR</p> <p>To search for a specific computer-based training, in the <b>Search</b> field type your search criteria.</p> <p>OR</p> <p>Click the <b>Library</b> 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 <b>Library</b> icon.</p> <p><i>A list of library topics display on the left.</i></p>
<p><b>Learning Center - Library</b></p>	<ol style="list-style-type: none"> <li>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.</li> </ol> <p><b>Note:</b> 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 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 <b>Start</b>.</p> <p><i>The Content player loads.</i></p> <p><b>Note:</b> If a popup blocker message displays, click <b>Start</b>.</p>

Select Activity and Start

# Register for Instructor Led Webinar

Screen	Step/Action
	<ol style="list-style-type: none"> <li>From the <b>Learning Center Home</b> screen, click the <b>Catalog Topic</b> 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 <b>Search</b> field type your search criteria. OR Click the <b>Library</b> icon to view a filtered list of training resources and courses that is sorted by activity type. In this example, we will use the <b>Catalog</b> icon. <i>A list of library topics display on the left.</i></li> </ol>
	<ol style="list-style-type: none"> <li>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. <b>Note:</b> 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.</li> </ol>



Screen	Step/Action
<p><b>Learning Center – Instructor Led Webinars</b></p>	<p>3. Select Instructor Led Webinars.</p> <p><i>A list of CitiManager Instructor Led Webinars display to the right.</i></p>
<p><b>Select and Register</b></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 <b>Register</b>.</p> <p><i>The Offerings screen displays.</i></p>

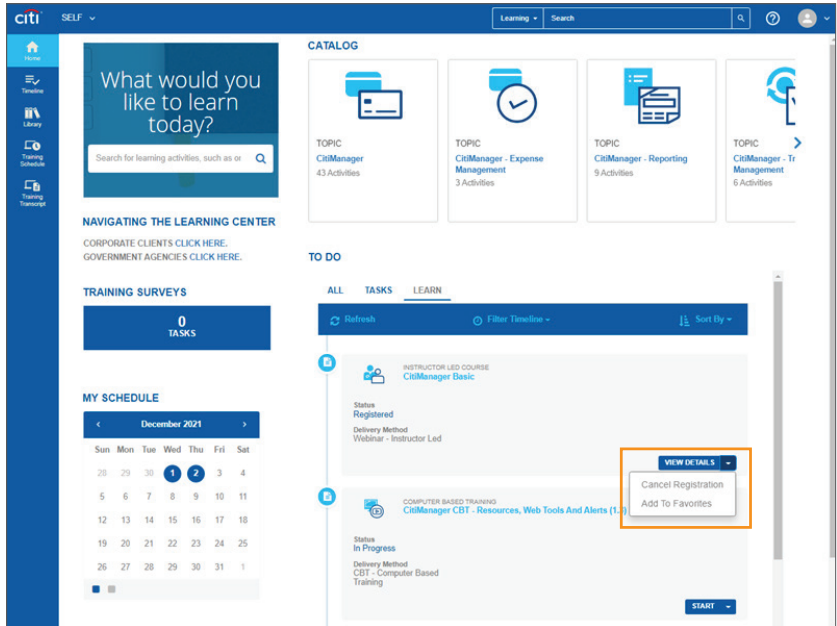
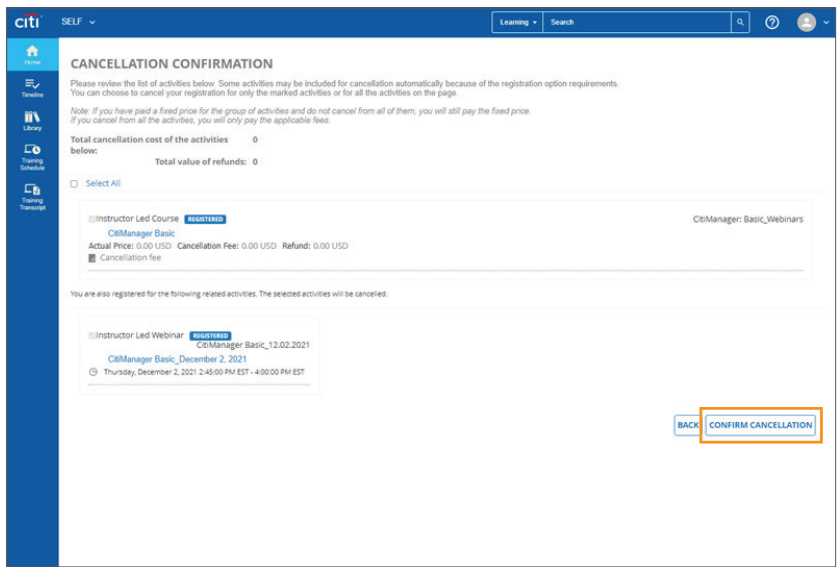
Screen	Step/Action
	<p>5. Select the <b>ADD</b> button for the desired date.</p> <p>6. Click the <b>Register</b> button.</p> <p><i>The Activities screen displays with a Registered message.</i></p>

**Offerings and Register**

	<p>7. Fifteen minutes prior to the start of the webinar, log back into the Learning Center and click the <b>Start</b> button displayed in your <b>To Do</b> list.</p> <p><b>Note:</b> The <b>Start</b> button will not be visible until 15 minutes prior to the session.</p>
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**Learning Center – To Do**

# Cancel Registration for Instructor Led Webinar

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

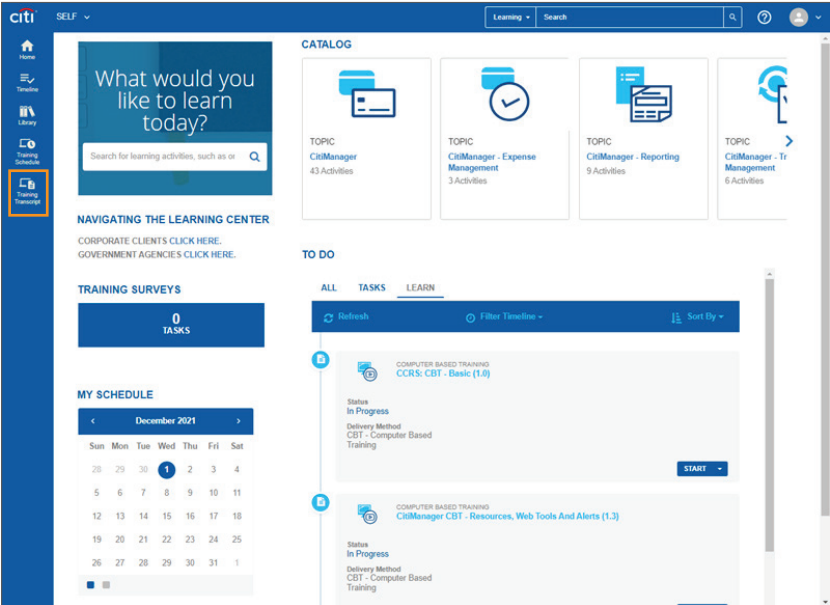
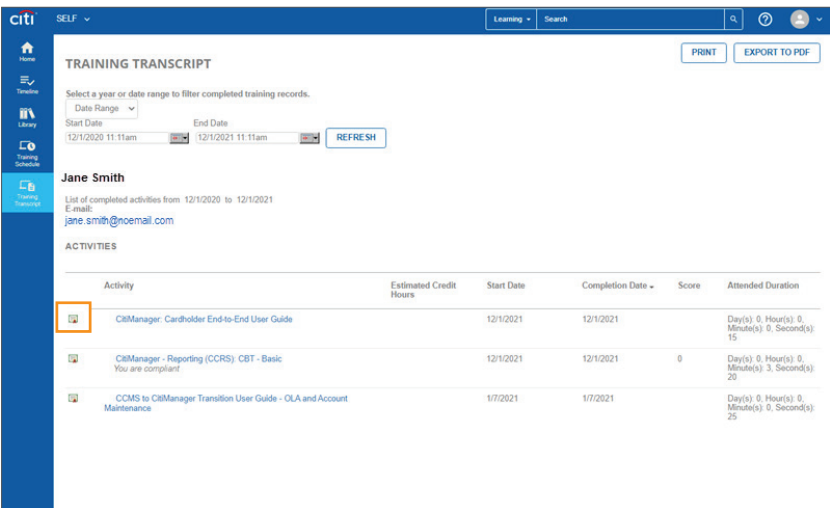
# Open a Reference Document

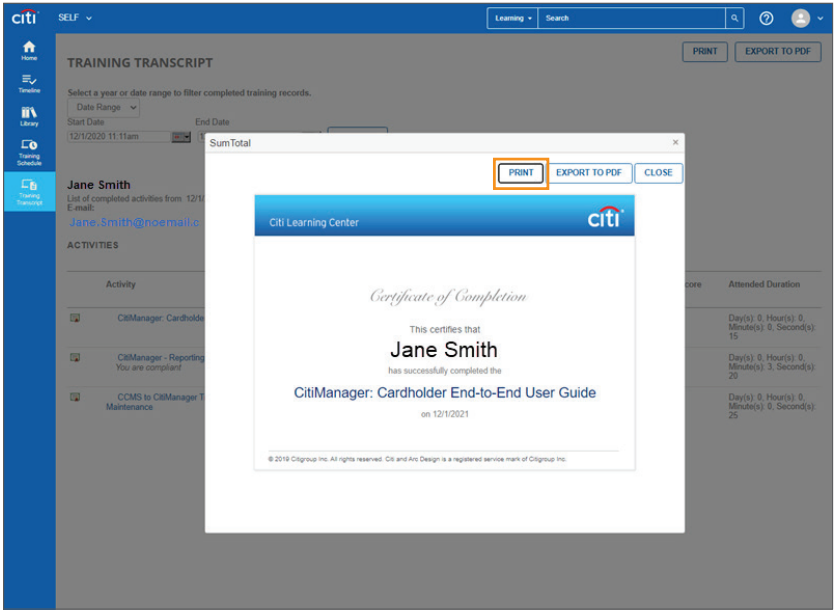
Screen	Step/Action
<p><b>Learning Center Home Screen</b></p>	<ol style="list-style-type: none"> <li>From the <b>Learning Center Home</b> screen, click the <b>Catalog Topic</b> to view an unfiltered list of that topic's training resources and courses that will not be sorted by activity type.</li> </ol> <p>OR</p> <p>To search for a specific reference document, in the <b>Search</b> field type your search criteria.</p> <p>OR</p> <p>Click the <b>Library</b> 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 <b>Library</b> icon.</p> <p><i>A list of library topics display on the left.</i></p>
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Screen	Step/Action
<p><b>Reference Documents</b></p>	<p>3. Select Reference Documents.</p> <p><i>The documents display to the right.</i></p>
<p><b>Select Activity and Start</b></p>	<p>4. To view a document, click the ellipsis (...) to the right of the activity you wish to view then click <b>Start</b>.</p> <p><i>The document will open in a new window.</i></p> <p><b>Note:</b> If a popup blocker message displays, click <b>Start</b>.</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><b>Learning Center Home Screen</b></p>	<p>1. From the <b>Learning Center Home</b> screen, click the <b>Training Transcript</b> link on the side navigation bar.</p> <p><i>The Training Transcript screen displays.</i></p>																								
 <p><b>Training Transcript</b></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><b>Training Transcript</b></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 <b>Diploma</b> 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																				
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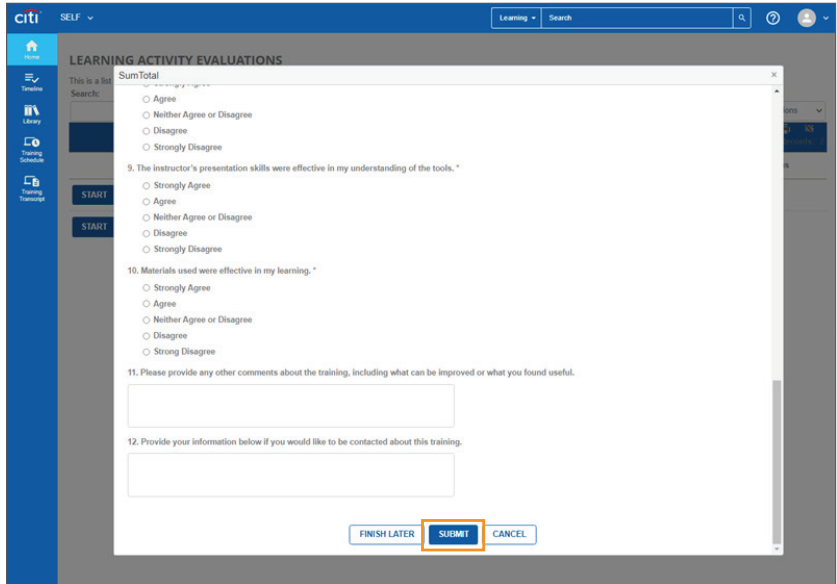
Screen	Step/Action
 <p>The screenshot shows the Citi Learning Center interface. On the left, there is a navigation menu with options like Home, Training, Library, and Training Schedule. The main area displays a 'TRAINING TRANSCRIPT' for Jane Smith, listing completed activities such as 'CitiManager: Cardholder 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 an orange box.</p>	<ol style="list-style-type: none"> <li>3. To print a Certificate of Completion, click the <b>Print</b> button. <i>The Print window opens.</i></li> <li>4. Select a printer and click the <b>Print</b> button. <i>The Certificate of Completion is printed on the selected printer.</i></li> <li>5. When you are finished, click the <b>Close</b> button.</li> </ol>
<p><b>Certificate of Completion – Print</b></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><b>Learning Center Home Screen</b></p>	<ol style="list-style-type: none"> <li>From the Learning Center <b>Home</b> screen, click the <b>Task</b> link in the <b>To Do</b> section or the <b>Pending Activity Evaluation</b> link on the <b>Training Surveys</b> section.   <b>Note:</b> If you click the <b>Task</b> link in the <b>To Do</b> section you will need to click the <b>Start</b> button.   <i>The Learning Activity Evaluations screen displays.</i> </li> </ol>															
<p><b>Learning Activity Evaluation</b></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>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"> <li>Click the <b>Start</b> button   <i>The Evaluation displays.</i> </li> </ol>
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><b>Evaluation</b></p>	<p>3. Complete the Evaluation and click <b>Submit</b>.</p>

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