

Learning Center

Quick Reference Guide

GSA and Public Sector
May 2022

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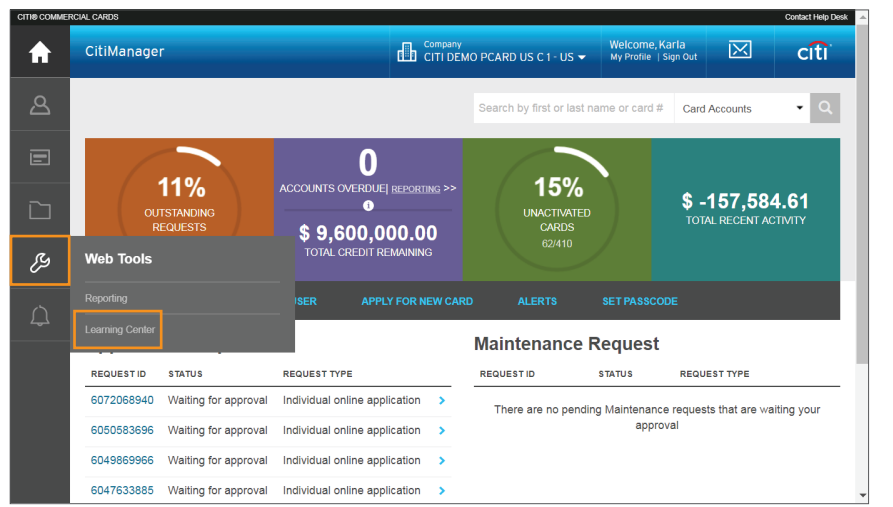
Learning Center Overview

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>The screenshot shows the CitiManager Site Home Screen. At the top, there is a navigation bar with the CitiManager logo, company name (CITI DEMO PCARD US C1 - US), and user information (Welcome, Karla). Below the navigation bar is a search bar. The main content area features four large cards: 11% Outstanding Requests, 0 Accounts Overdue, \$9,600,000.00 Total Credit Remaining, and 15% Unactivated Cards. A 'Web Tools' menu is open, showing 'Learning Center' as an option. Below the cards are links for Reporting, Apply for New Card, Alerts, and Set Passcode. At the bottom, there is a 'Maintenance Request' table with columns for Request ID, Status, and Request Type. The table contains four rows of data, all with a status of 'Waiting for approval'.</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>
<p>CitiManager Site Home Screen</p>	

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/restart 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
	<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 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>
	<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.

Learning Center – Library

Screen	Step/Action
<p>The screenshot shows the 'LIBRARY' page in the Citi Learning Center. The left sidebar has 'Instructor Led Webinars' highlighted. The main area displays a list of recorded webinars under the heading 'Full Library'. The first item is '2021 GSA Conference CITI013 July 20 2pm CitiManager Basic Reporting and Program Dashboards (Non-DoD)'. Other items include '2021 GSA Conference Introduction to the WEX Fleet Analytics Recorded Webinar', '2021 GSA Conference B2B Best Practices Virtual Card Payment Solution', and '2021 GSA Conference Citi and the Resources Available to the AOPC'.</p>	<p>3. Click Instructor Led Webinars.</p> <p><i>A list of CitiManager Instructor Led Webinars display to the right.</i></p>
<p>This screenshot shows the 'LIBRARY' page filtered to 'Instructor Led Webinars'. The left sidebar shows 'Instructor Led Webinars' selected. The main area shows 3 results. The second result, 'GSA: CitiManager - What Can My Cardholders Do', has a 'Register' button highlighted with a yellow box. A 'View Details' button is also visible below it.</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 and 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 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>
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Learning Center – To Do

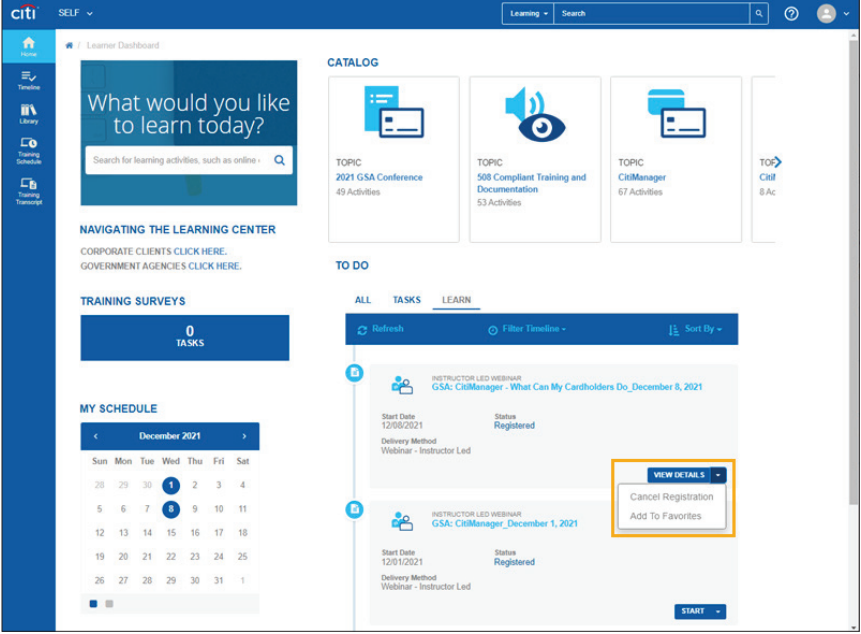
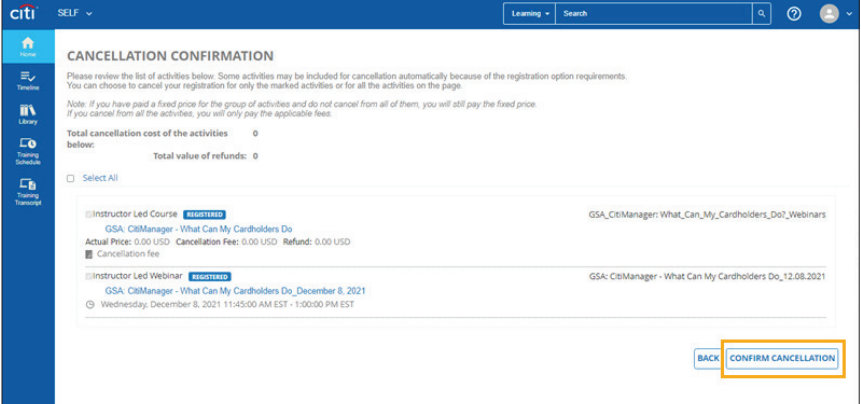
Register for In-Person Training

Screen	Step/Action
<p>Learning 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 sidebar on the left containing navigation options like Home, Timeline, Library, Training Schedule, and Training Transcript. The main content area is titled 'IN-PERSON TRAINING' and shows a search bar with '2 of 2 results for ""'. Two training items are listed, each with a 'REGISTER' button. The first item, 'DoD Travel: Norfolk, VA Classroom - CitiManager End-to-End Training', has its title highlighted with a yellow box.</p>	<p>3. To register for an In-Person Training, click the title of the training you wish to register for.</p> <p><i>The Instructor Led Course – Details screen displays.</i></p>
<p>In-Person Training</p>	
<p>The screenshot shows the 'Instructor Led Course - Register' page. The title is 'DOD TRAVEL: NORFOLK, VA CLASSROOM - CITIMANAGER END-TO-END TRAINING'. Below the title 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'.</p>	<p>4. Click the Register button.</p> <p><i>The Activity Registration screen displays.</i></p>
<p>Instructor Led Course – Register</p>	

Screen	Step/Action
	<ol style="list-style-type: none"> 5. Select 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>
<p>Add – Register</p>	

Cancel Registration for Instructor Led Webinar and In-Person Training

Screen	Step/Action
 <p>The screenshot shows the Learning Center Home screen. On the left is a navigation sidebar. The main content area has a 'CATALOG' section with topic cards and a 'TO DO' section. Under 'TO DO', there are two activity cards. The first card is for an 'INSTRUCTOR LED WEBINAR: GSA: CitiManager - What Can My Cardholders Do, December 8, 2021'. A 'VIEW DETAILS' button is highlighted with a yellow box, and its dropdown menu is open, showing 'Cancel Registration' and 'Add To Favorites' options.</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 for the training you wish to cancel then click Cancel Registration. <i>The Cancellation Confirmation screen displays.</i>
<p>Learning Center Home Screen – To Do</p>	
 <p>The screenshot shows the 'CANCELLATION CONFIRMATION' screen. It contains a list of activities with their cancellation details. Two activities are listed: 'Instructor Led Course' and 'Instructor Led Webinar'. The 'CONFIRM CANCELLATION' button at the bottom right is highlighted with a yellow box.</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>
<p>Cancel Registration</p>	

Open a Reference Document

Screen	Step/Action
<p>The screenshot shows the Learning Center Home interface. On the left, there is a navigation sidebar with icons for Home, Training Schedule, Library (highlighted), Training Schedule, and Training Transcript. The main content area is divided into several sections: a 'What would you like to learn today?' search prompt, 'NAVIGATING THE LEARNING CENTER' with instructions for corporate and government clients, 'TRAINING SURVEYS' showing 0 tasks, and 'MY SCHEDULE' for December 2021. The 'CATALOG' section displays four topic cards: '2021 GSA Conference' (49 Activities), '508 Compliant Training and Documentation' (53 Activities), 'CitiManager' (67 Activities, highlighted with a yellow border), and 'CitiManager - Reporting' (8 Activities). Below the catalog is a 'TO DO' section with 'ALL', 'TASKS', and 'LEARN' tabs, showing a list of tasks with 'START' buttons.</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 reference document, 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>The screenshot shows the Learning Center Library interface. The left sidebar has the 'Library' icon highlighted. The main content area is titled 'LIBRARY' and includes a search bar and a 'Full Library' section. The 'Full Library' section shows 20 of 163 results, sorted by Name: A to Z. The list includes several recorded webinars, such as '2021 GSA Conference Citi013 July 20 2pm CitiManager Basic Reporting and Program Dashboards (Non-DoD)', '2021 GSA Conference Introduction to the WEX Fleet Analytics Recorded Webinar', '2021 GSA Conference B2B Best Practices Virtual Card Payment Solution', and '2021 GSA Conference Citi and the Resources Available to the AOPC'.</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.

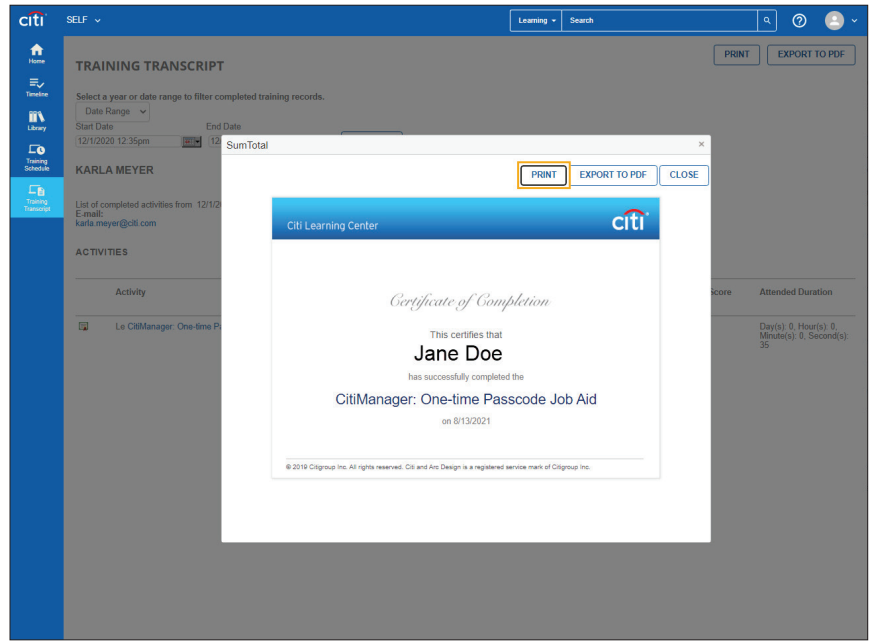
Screen	Step/Action
	<p>3. Click Reference Documents.</p> <p><i>The documents display to the right.</i></p>
<p>Learning Center – Reference Documents</p>	

	<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.

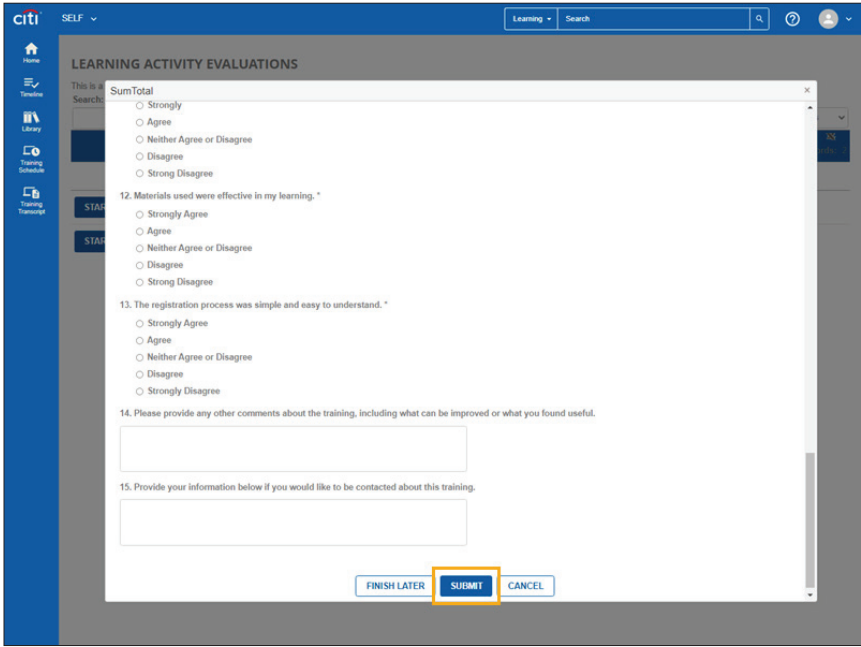
Screen	Step/Action
<p>Learning Center Home Screen</p>	<ol style="list-style-type: none"> From the Learning Center Home screen, click the Training Transcript link on the side navigation bar. <i>The Training Transcript screen displays.</i>
<p>Training Transcript</p>	<ol style="list-style-type: none"> To view a Certificate of Completion, click the Diploma icon for the desired activity. <i>The Certificate of Completion opens in a small window.</i>

Screen	Step/Action
	<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 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>The screenshot shows the Learning Center Home Screen. On the left, there are navigation icons for Home, Timeline, Library, Training Schedule, and Training Transcript. The main content area includes a 'CATALOG' section with four topic cards: '2021 GSA Conference' (49 Activities), '508 Compliant Training and Documentation' (53 Activities), 'CitiManager' (67 Activities), and 'CitiManager - Re' (8 Activities). Below this is a 'TRAINING SURVEYS' section with two buttons: '2 TASKS' and '2 PENDING ACTIVITY EVALUATIONS'. The 'TO DO' section is active, showing a task for 'INSTRUCTOR LED WEBINAR: GSA: CitiManager - What Can My Cardholders Do, December 8, 2021'. The task details include 'Start Date: 12/08/2021', 'Status: Registered', and 'Delivery Method: Webinar - Instructor Led'. A 'START' button is highlighted in the task card.</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 in 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>The screenshot shows the Learning Activity Evaluations screen. It features a search bar and a 'View: Pending evaluations' dropdown. Below is a table with the following data:</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>GSA: CitiManager</td> <td>GSA_CitiManager_Basic_Webinars</td> <td>12/4/2021</td> <td>New</td> </tr> <tr> <td>GSA Training Evaluation</td> <td>GSA: CitiManager_December 1, 2021</td> <td>GSA_CitiManager_December 1, 2021</td> <td>12/6/2021</td> <td>New</td> </tr> </tbody> </table> <p>The 'START' button is highlighted for the first row.</p>	Evaluation Name	Activity Name	Code	Due Date	Status	GSA Training Evaluation	GSA: CitiManager	GSA_CitiManager_Basic_Webinars	12/4/2021	New	GSA Training Evaluation	GSA: CitiManager_December 1, 2021	GSA_CitiManager_December 1, 2021	12/6/2021	New	<ol style="list-style-type: none"> Click the Start button. <i>The Evaluation displays.</i>
Evaluation Name	Activity Name	Code	Due Date	Status												
GSA Training Evaluation	GSA: CitiManager	GSA_CitiManager_Basic_Webinars	12/4/2021	New												
GSA Training Evaluation	GSA: CitiManager_December 1, 2021	GSA_CitiManager_December 1, 2021	12/6/2021	New												

Screen	Step/Action
 <p>The screenshot shows a web interface for 'LEARNING ACTIVITY EVALUATIONS'. It features a sidebar with navigation icons (Home, Timeline, Library, Training Schedule, Training Transcript) and a main content area. The main area contains a 'Sum Total' section with radio button options: Strongly, Agree, Neither Agree or Disagree, Disagree, and Strong Disagree. Below this are three numbered questions (12, 13, 14) with similar radio button options. Question 14 includes a text input field for comments. Question 15 includes a text input field for contact information. At the bottom of the form are three buttons: 'FINISH LATER', 'SUBMIT' (highlighted with a yellow box), and 'CANCEL'.</p>	<p>3. Complete the Evaluation and click the Submit.</p>

Evaluation

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