Learning Center

Quick Reference Guide

Commercial Cards

February 2023



Treasury and Trade Solutions



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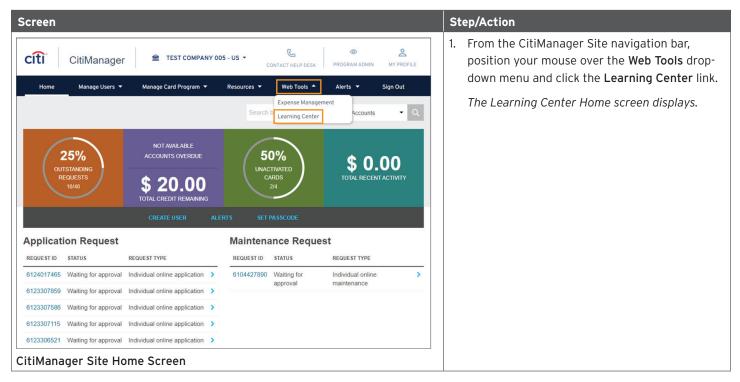
Learning Center Overview

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.

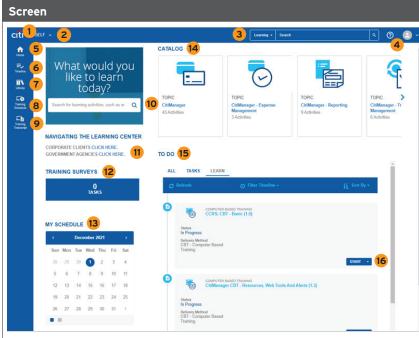
Access the Learning Center

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.





Learning Center Navigation

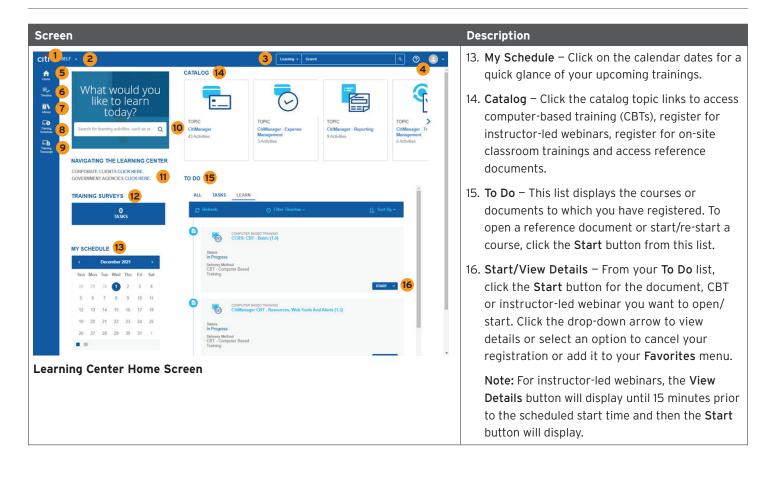


Learning Center Home Screen

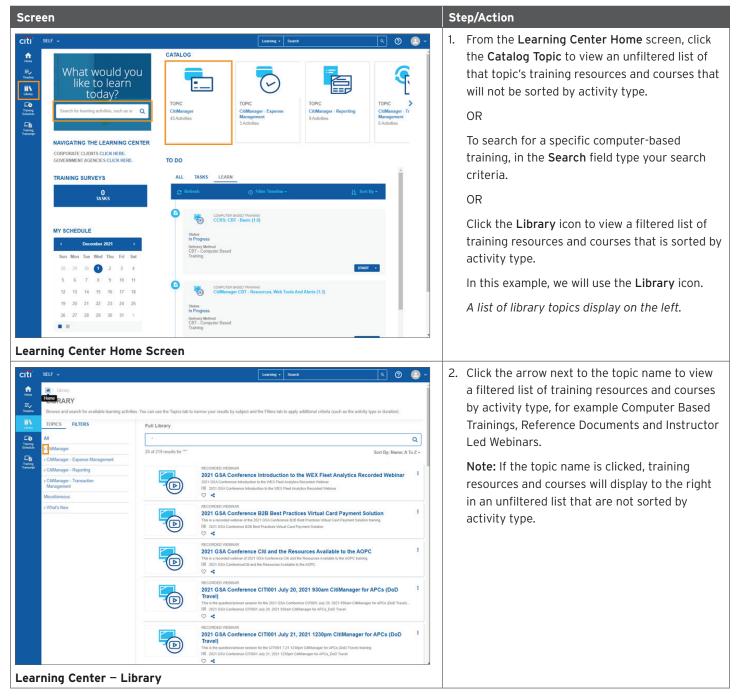
Description

- 1. **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.
- 5. 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.
- 10. 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.





View a Computer Based Training





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Register for Instructor Led Webinar

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CITI SEF C CITI SEF C Consearch for available learning activities. You can use the Consearch for available learning activ	٩	 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.



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Computer Based Trainings (CBTs) Instructor Led Webinars				
> Reference Documents	-0	INSTRUCTOR LED COURSE CitiManager Basic		
> CitiManager - Expense Management	<u> </u>	This class provides an overview of how to use CitiManager. Topics that will be covered include basic navigation. Register View Details		
CitiManager - Reporting CitiManager - Transaction	-	INSTRUCTOR LED COURSE	2	
Management	20	CitiManager: Bulk Online Applications and Maintenance (BOLA/M) This class provides an overview of how to use Bulk Online Applications and how to perform Bulk Online Maintenance. Topics that wil		
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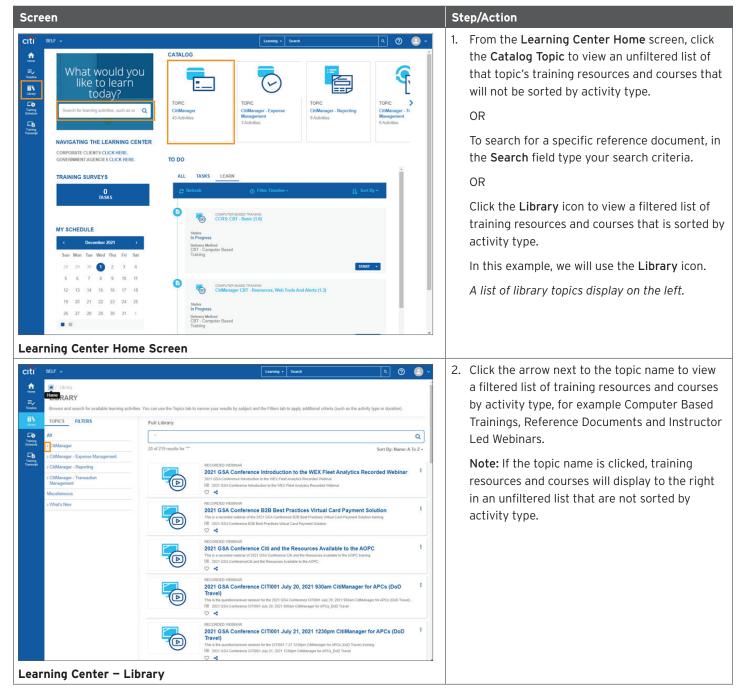


Cancel Registration for Instructor Led Webinar

 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. The Cancellation Confirmation screen displays.
2. Click the Confirm Cancellation button.
The dashboard redisplays and the training has been removed from your To Do list.



Open a Reference Document





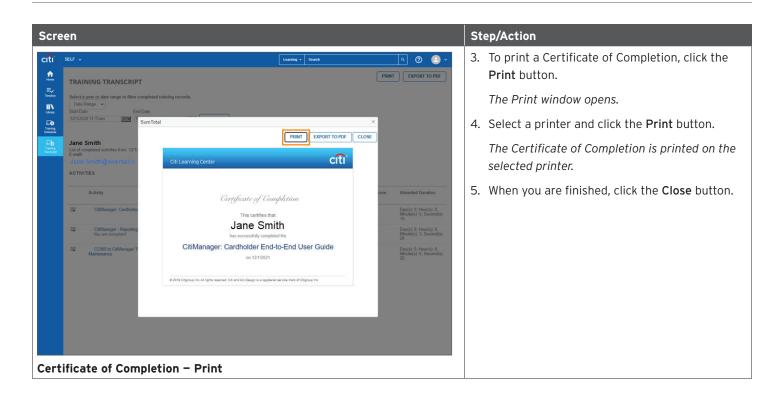
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Complete Training Surveys

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.

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