Access Online
Web-Based Training Guide

USDA Purchase Card Program

USDA OPPM Charge Card Service Center

Document Date: 10/01/2013
Version: 2.0

Revision History

Table 1 provides the revision history of this document.

Table 1. Revision History

Version	Date	Definition
1.0	02/02/2010	Initial version.
2.0	10/01/2013	Formatting updates.

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1 Introduction

1.1 Purpose of Document

This document describes the specific process for using U.S. Bank's Web-Based Training (WBT) module and completing the training modules to obtain your certification.

1.2 Scope of Document

The CCSC provides this document to all APCs/LAPCs that request WBT guidance and assistance and can be used for any role level, APC, LAPC, AFPC, LFPC, AO, Financial Manager, or Government Cardholder.

Forward any questions concerning this manual to the USDA Charge Card Service Center (CCSC) CCSC Inbox. Additional information is also available on the CCSC Web site.

1.3 Location of Document

This document is located on the CCSC Web site with other guides, reference materials, and training documents.

1.4 Abbreviations and Acronyms

Table 2 provides a list of abbreviations and acronyms used within the document.

Table 2. List of Abbreviations and Acronyms

Term	Definition
CCSC	Charge Card Service Center
APC/AFPC	Agency Program Coordinator/Agency Fleet Program Coordinator
LAPC/LFPC	Local Agency Program Coordinator/Local Fleet Agency Program Coordinator
AO	Approving Official
BO	Billing Official
MCC	Merchant Category Code
MCCG	Merchant Category Code Group
OMB	Office of Management and Budget
DR	Departmental Regulation (DR) 5013-6: *Use of the Purchase Card and Related Alternative Payment Methods* (November 2012)

Term	Definition
WBT	Web-Based Training

1.5 Providing Feedback to the CCSC

The CCSC welcomes your feedback. Please send us an e-mail at the CCSC Inbox about ways we can improve this manual and/or questions you may have.

2 Logging into Access Online Web-based Training

Figure 1 is the initial login page for Access Online WBT. All individuals associated with the USDA Card Program need to use the login at the bottom of the page under the "Registered Users" header, to sign in for their appropriate training.

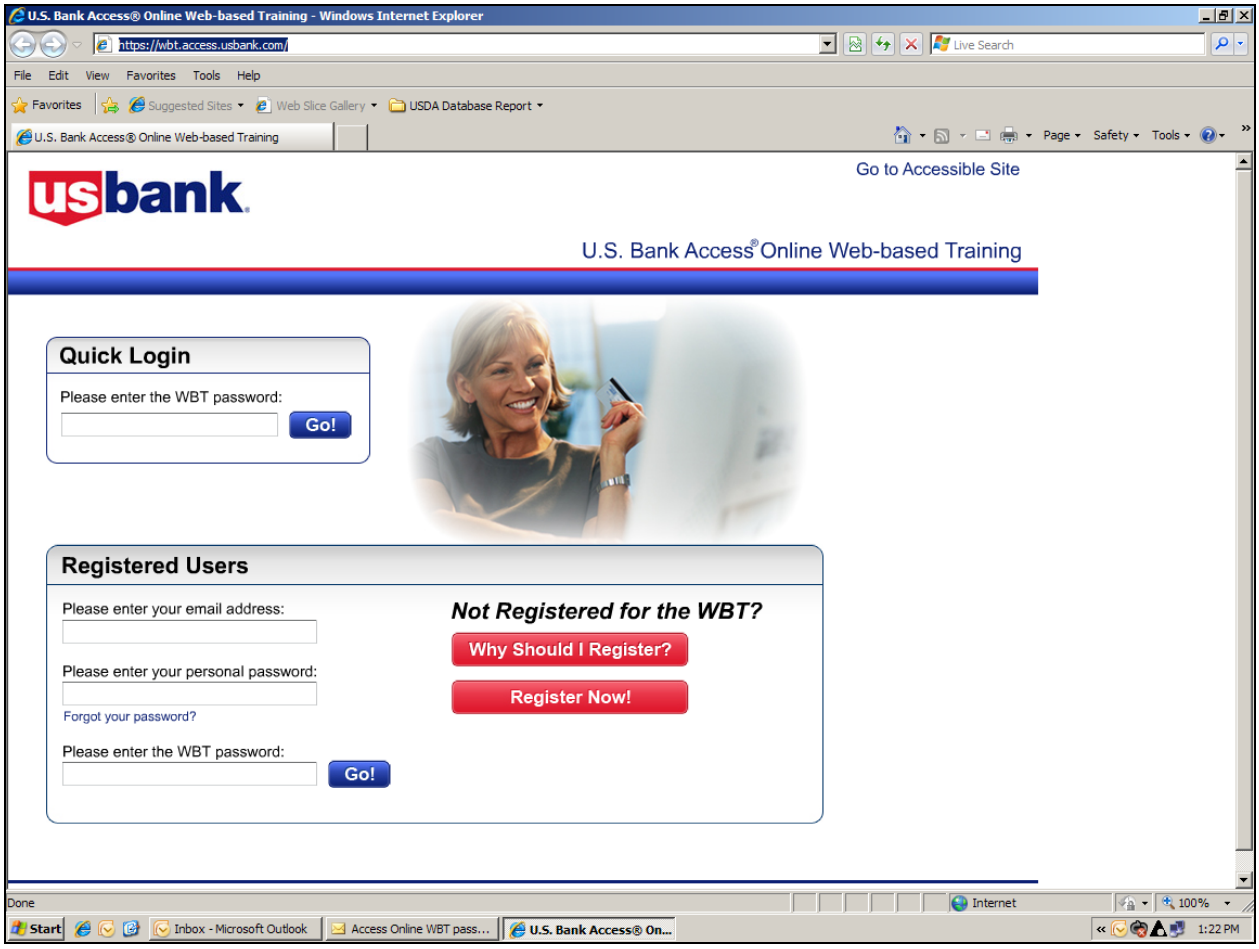

Figure 1. WBT Login Page

3 WBT Training Notes

- Policy trainings are not included under the “Quick Login” header.
- The e-mail and (personal) password entered during the initial registration is retained by the system; therefore, that is the only password that can be entered in the **Please enter your personal password** field, thereafter. Please remember this password.
- During the initial registration (i.e., Personal Information), the only value you should enter in the **Organization Short Name** field is “USDA”.
- Users will continue to use the 60-days WBT password associated with the “User Type” they selected during their initial registration to access the training.
- If the lesson is not available to a particular user type, the lesson is notated as “N/A” in the table listed below each link.
- Fleet Coordinators or drivers that hold a Driver card must complete the modules notated as “Driver Cardholder” in the Cardholder column in the table listed below each link.

3.1 WBT User Types Government A/OPC and Government AO Modules

Figure 2 is the first screen that displays for the user types, Government A/OPC and Government AO, upon logging into the WBT.

There are seven training links listed under the “How do I. . . ?” with the modules that should be completed by all users.

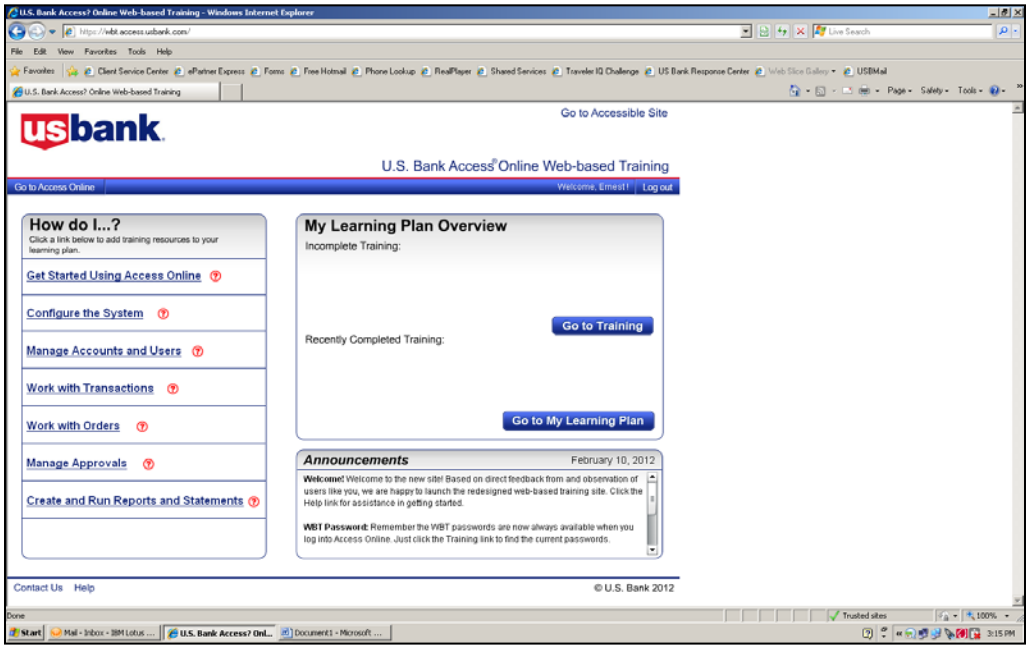

Figure 2. WBT Government A/OPC and Government AO Training Modules

3.2 WBT User Type Cardholder Modules

Figure 3 displays the six links under the “How do I . . .?” for cardholders. The Configure the System module is not applicable to the cardholder user type.

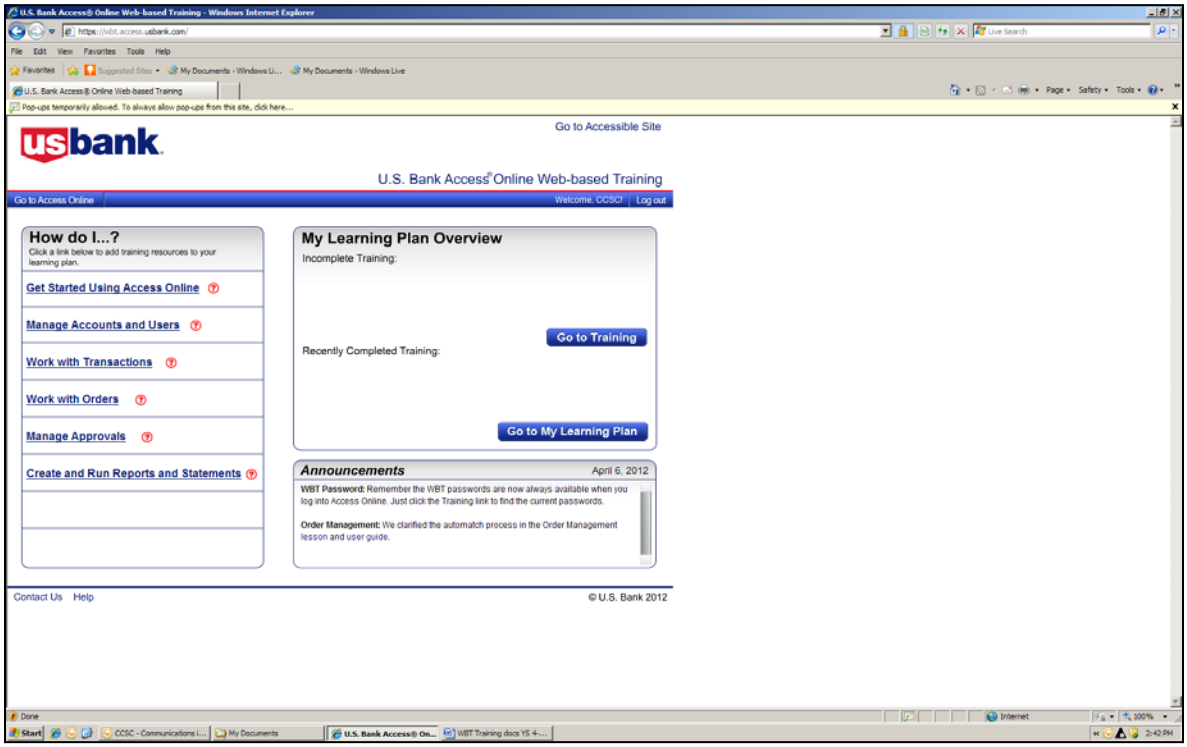

Figure 3. WBT User Type Cardholder Training Modules

4 WBT Modules

This section provides screen shots of the WBT modules, as well as information on who should complete the modules. You should work through these sections in consecutive order to select the lessons needed and then to add those to your lesson plan (My Learning Plan).

4.1 Getting Started Using Access Online Module

Figure 4 displays the first module, Get Started Using Access Online.

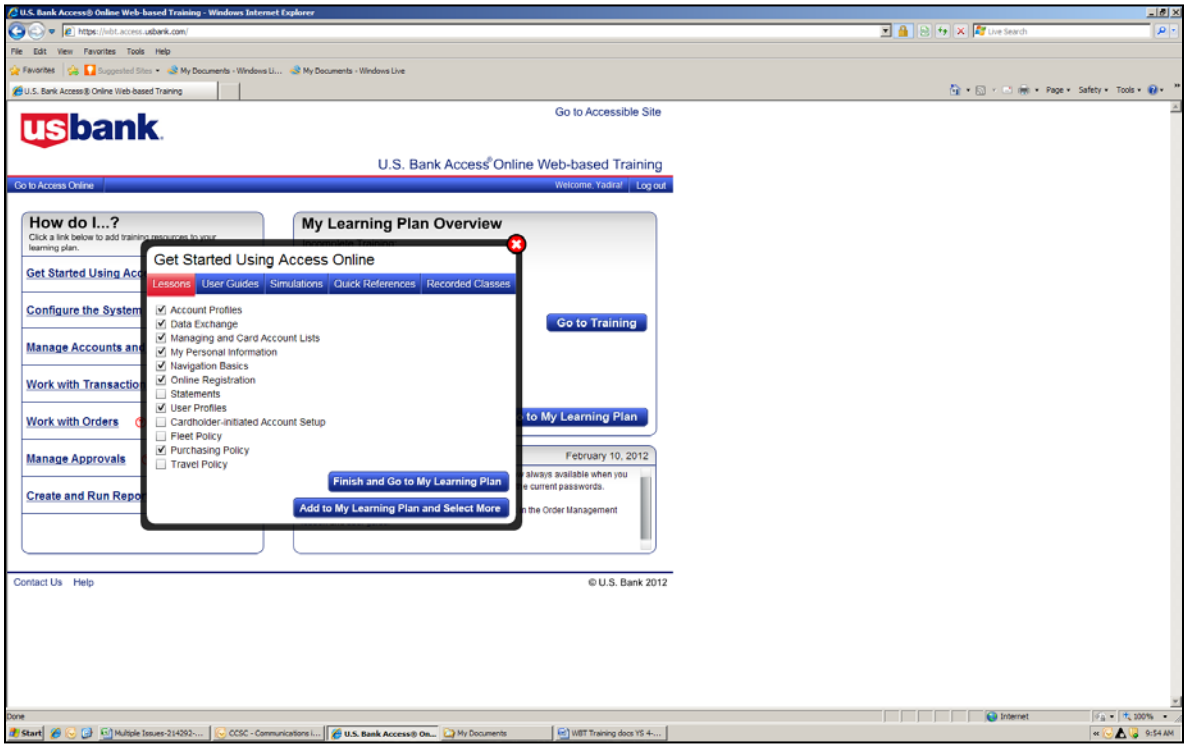

Figure 4. Getting Started Using Access Online Module Page

Table 3 lists all of the courses that are offered within this module. To take the courses, you select the lessons under the Getting Started Using Access Online link. The courses listed are according to the "User Type" selected during the Registration process.

Table 3. User Types for Getting Started Using Access Online Module

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Account Profiles	Y	Y	Y
Data Exchange	Y	N	N/A
Managing and Card Account Lists	Y	Y	N/A
My Personal Information	Y	Y	Y

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Navigation Basics	Y	Y	Y
Online Registration	Y	Y	Y
Statements	A/OPC	N	Travel Cardholder
User Profiles	Y	N	N/A
Cardholder-initiated Account Setup	N	N	N
Fleet Policy	AFPC/LFPC	N	Driver Cardholder
Purchasing Policy	APC/LAPC	Y	Purchase Cardholder
Travel Policy	A/OPC	N	Travel Cardholder

Table 3 aids you in determining the modules to complete within the Get Started Using Access Online module. To add a course to your learning plan, select the applicable boxes next to the modules you wish to complete and click the **Add to My Learning Plan and Select More** button at the bottom of the dialog box.

During the registration process, the user would have chosen one of the following user type options from the drop-down box:

- Government Cardholder
- Government A/OPC
- Government AO/BO
- Government Financial Manager

In Table 3, the user type is the column header. The following assumptions should be noted for the information listed in all grids:

- Under the Government A/OPC column header:
  - Purchase = APC/LAPC
  - Fleet = AFPC/LFPC
  - Travel = A/OPC
- Under the Government Cardholder column header:
  - Purchase Cardholder = lesson is exclusive to Purchase cardholders
  - Driver Cardholder = lesson is exclusive to Fleet Coordinators/Drivers with Driver cards
  - Travel Cardholder = lesson is exclusive to Travel cardholders
  - Y = Purchase/Driver/Travel cardholders
- N/A = the lesson is not applicable to that User Type

Please note that there are duplicate lessons listed throughout the WBT training (e.g., Online Registration, User Profiles, Purchasing Policy, etc.). Users are only required to complete the duplicate lessons once. You can select to complete the lesson in any of the seven modules, and once completed, you do not need to take the lesson again.

4.2 Configure the System Module

Figure 5 displays the Configure the System module page.

Note: This module is not applicable to user type Government Cardholder.

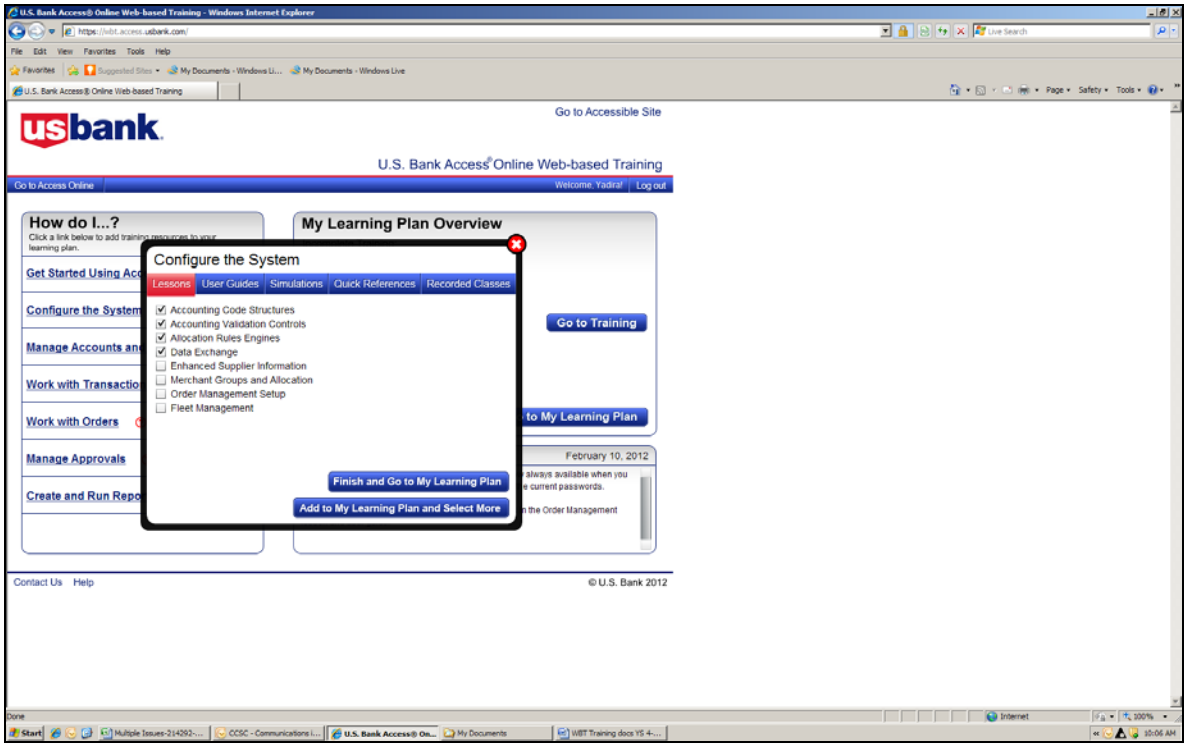

Figure 5. Configure the System Module Page

Table 4 list all the individuals involved with the charge card program(s) that need to take the listed lessons within the Configure the System module.

Table 4. User Types for Configure the System Module

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Accounting Code Structures	N	N	N/A
Accounting Validation Controls	Y	Y	N/A
Allocation Rules Engines	N	N	N/A
Data Exchange	Y	N	N/A

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Enhanced Supplier Information	N	N	N/A
Merchant Groups and Allocation	Y	N	N/A
Order Management Setup	N	N	N/A
Fleet Management	AFPC/LFPC	N	N/A

4.3 Manage Accounts and User Module

Figure 6 lists the lessons under the Manage Accounts and Users module.

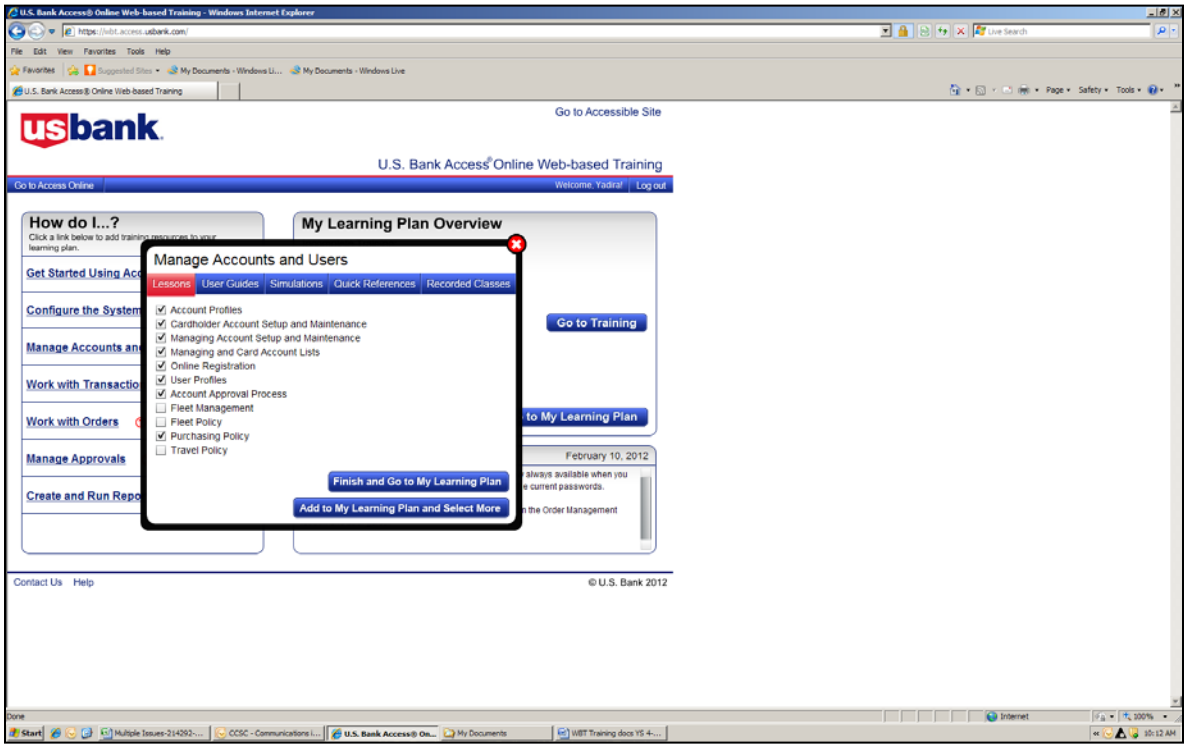

Figure 6. Manage Accounts and Users Page

Table 5 list all individuals involved with the charge card program(s) that need to take the listed lessons in the Manage Accounts and Users module.

Table 5. User Types for Manage Accounts and Users Module

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Account Profiles	Y	Y	Y

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Cardholder Account Setup and Maintenance	Y	N	N/A
Managing Account Setup and Maintenance	Y	N	N/A
Managing and Card Account Lists	Y	N	N/A
Online Registration	Y	Y	Y
User Profiles	Y	N	N/A
Account Approval Process	Y	Y	N/A
Fleet Management	AFPC/LFPC	N	N/A
Fleet Policy	AFPC/LFPC	N	N/A
Purchasing Policy	APC/LAPC	Y	N/A
Travel Policy	A/OPC	N	N/A
Statements	N/A	N/A	N
Make Electronic Payments with ePay	N/A	N/A	N
Cardholder-initiated Account Setup	N/A	N/A	N

4.4 Work with Transactions

Figure 7 lists the lessons under the Work with Transactions module.

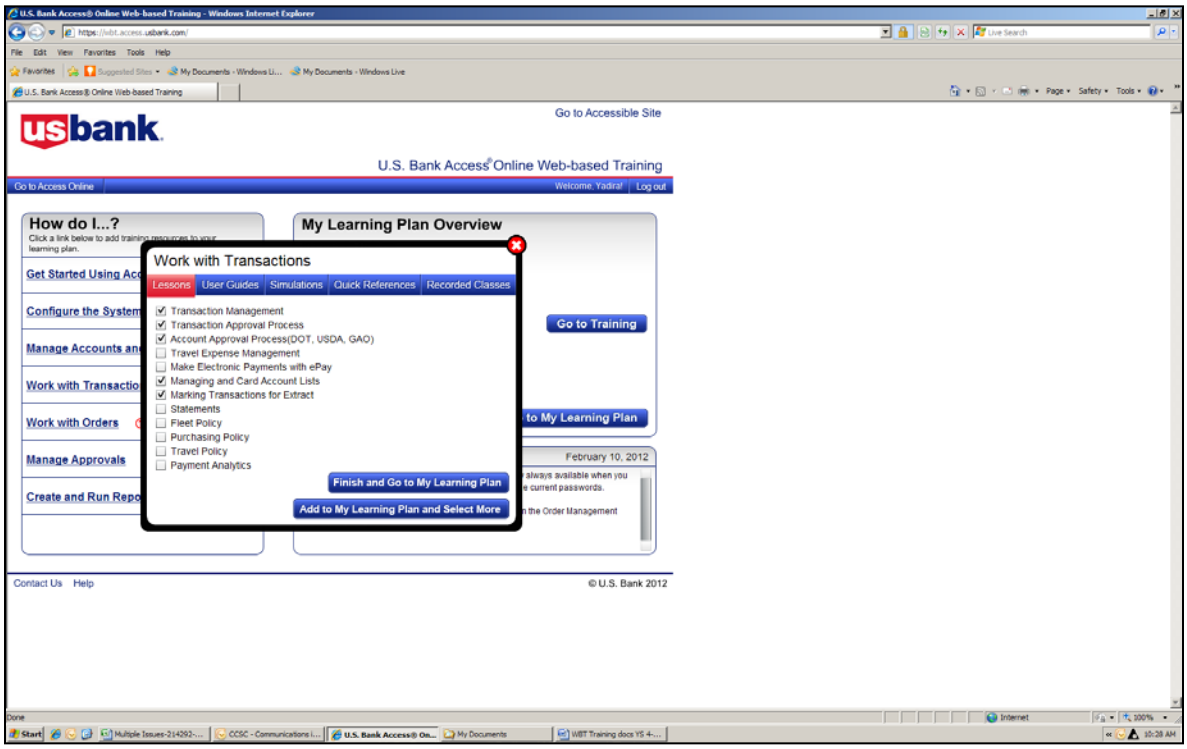

Figure 7. Work with Transaction Page

Table 6 list all the individuals involved with the charge card program(s) that need to take the lessons in the Work with Transaction module.

Table 6. User Types for the Work with Transactions Module

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Transaction Management	Y	Y	Y
Transaction Approval Process	Y	Y	Y
Account Approval Process	Y	Y	Y
Travel Expense Management	N	N	N
Make Electronic Payments with ePay	N	N	Travel Cardholder
Managing and Card Account Lists	Y	N	N/A
Marking Transactions for Extract	N	N	N/A

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Statements	A/OPC	N	N/A
Fleet Policy	AFPC/LFPC	N	Driver Cardholder
Purchasing Policy	APC/LAPC	Y	Purchase Cardholder
Travel Policy	A/OPC	N	Travel Cardholder
Payment Analytics	Y	Y	N/A

4.5 Work with Orders Module

Figure 8 displays the lessons under the Work with Orders module.

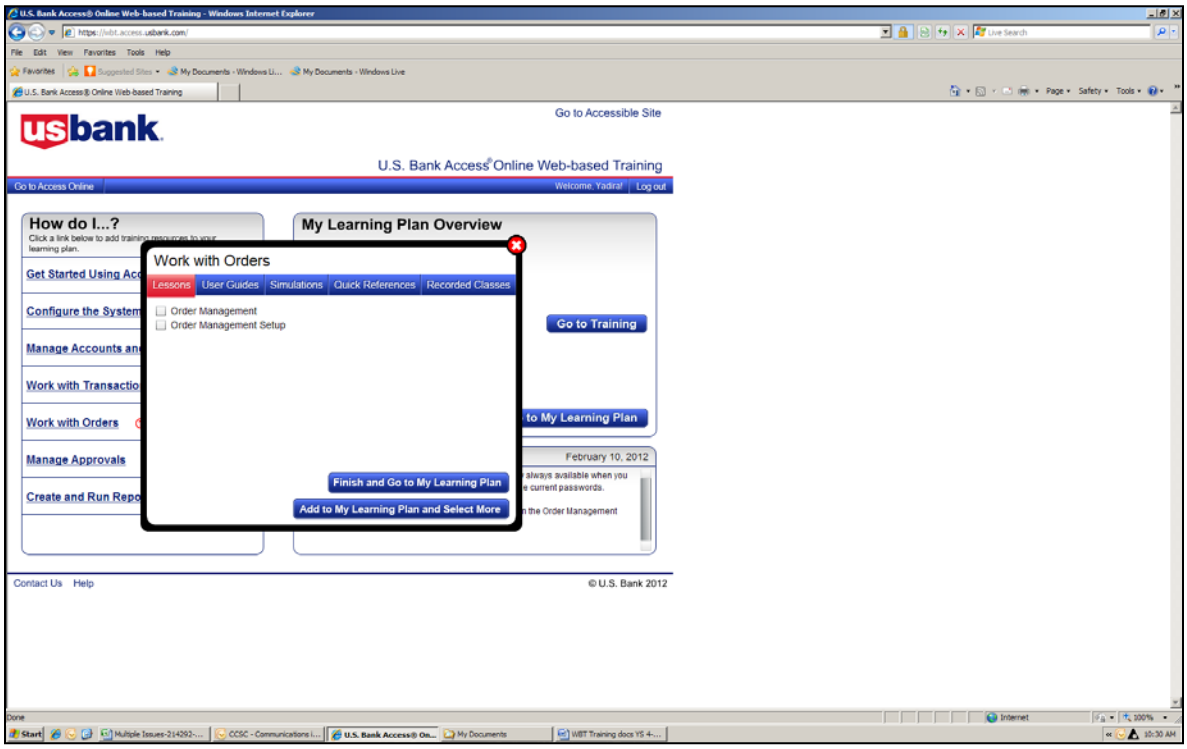

Figure 8. Work with Orders Page

Table 7 list all the individuals involved with the charge card program(s) that need to take the lessons listed under the Work with Orders module.

Table 7. User Types for Work with Orders Module

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Order Management	N	N	N
Order Management Setup	N	N	N/A

4.6 Manage Approvals

Figure 9 list the lessons under the Manage Approvals module.

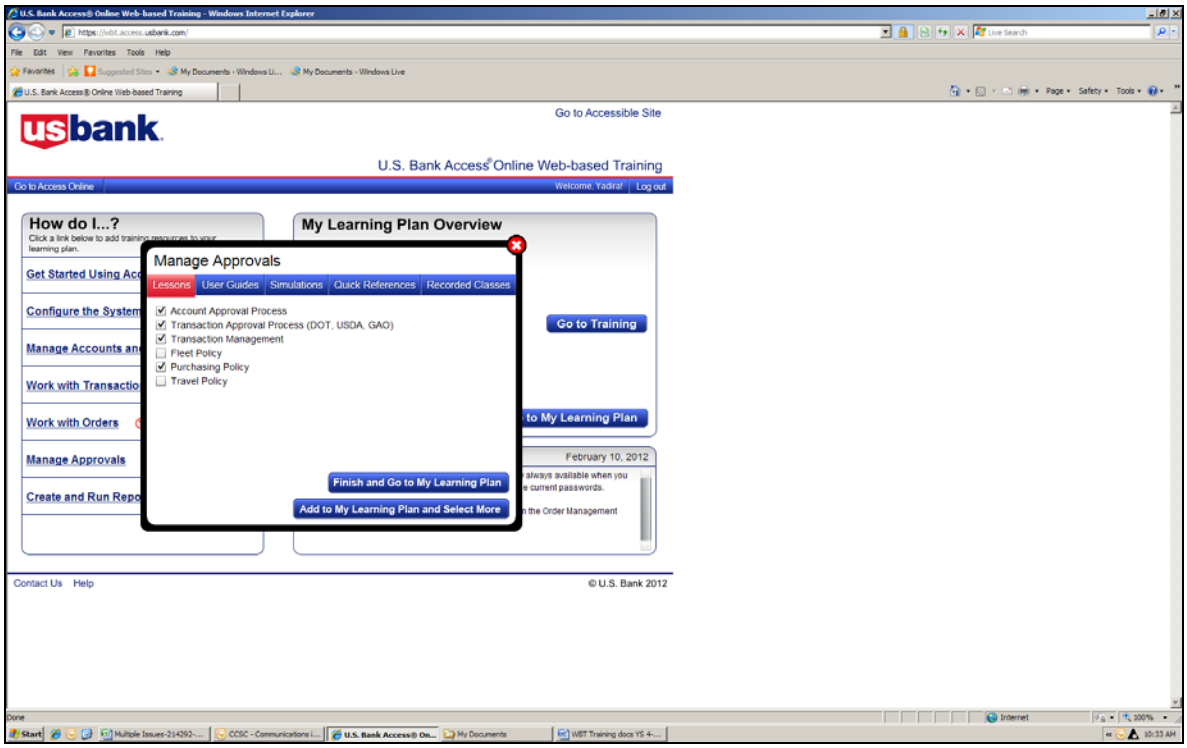

Figure 9. Manage Approvals Page

Table 8 list all individuals involved with the charge card program(s) that need to take the lessons listed in the Manage Approval module.

Table 8. User Types for Manage Approval Module

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Account Approval Process	Y	Y	N
Transaction Approval Process	Y	Y	N
Transaction Management	Y	Y	N/A
Fleet Policy	AFPC/LFPC	N	N/A
Purchasing Policy	APC/LAPC	Y	N/A
Travel Policy	A/OPC	N	N/A

4.7 Create and Run Reports and Statements

Figure 10 lists the lessons under the Create and Run Reports and Statements module.

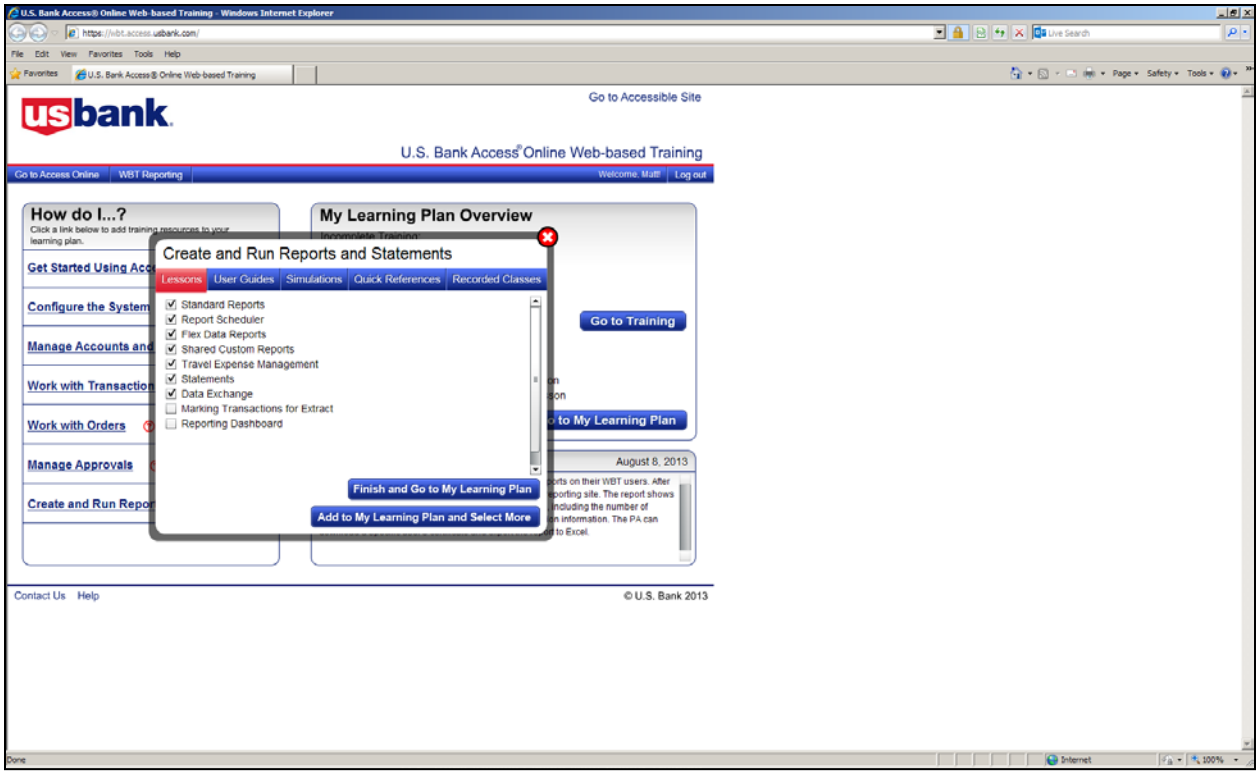

Figure 10. Create and Run Reports and Statements Page

Table 9 list all the individuals involved with the charge card program(s) that need to take the lessons listed in the Create and Run Reports and Statements module.

Table 9. User Types for Create and Run Reports and Statements Module

Lessons:	Government A/OPC	Government AO/BO	Government Cardholder
Standard Reports	Y	N	N
Report Scheduler	Y	N	N/A
Flex Data Reports	Y	N	N/A
Shared Custom Reports	Y	N	N/A
Travel Expense Management	A/OPC	N	N
Statements	A/OPC	N	N
Data Exchange	Y	N	N/A
Marking Transactions for Extract	N	N	N/A
Reporting Dashboard	N	N	N/A

4.8 Adding the Lessons to My Lesson Plan

To select the lessons and add you lesson plan, follow these instructions:

1. Click the **Finish and Go to My Learning Plan** button once you have selected the appropriate lessons within each of the seven (or six) modules to add them to your learning plan.

   Figure 11, My Learning Plan page displays.

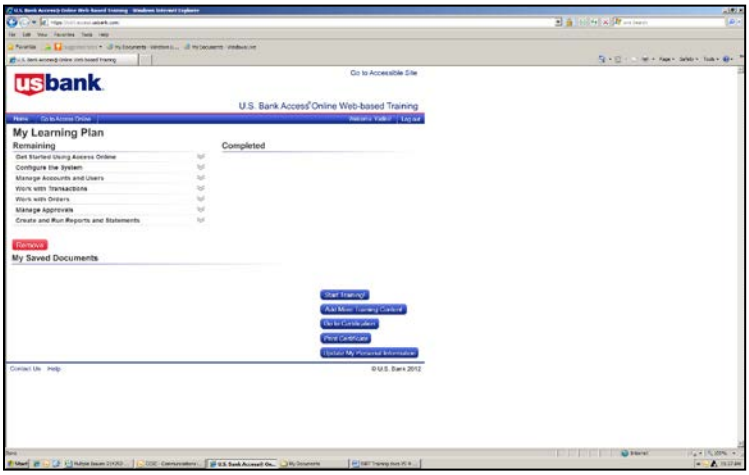

Figure 11. My Learning Plan Page

Under the Remaining heading are the modules you need to complete.

2. Click the links under the Remaining heading to view the training lessons you selected and added to your learning plan.

Figure 12 is an example of the expanded Get Started Using Access Online module.

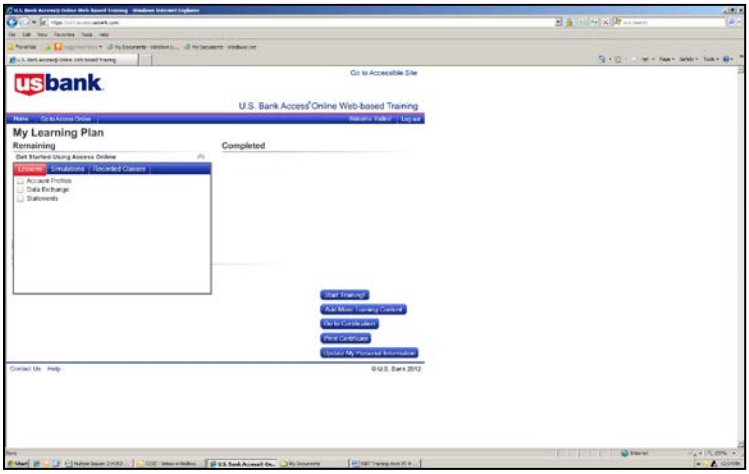

Figure 12. Expanded Get Started Using Access Online Module

4.9 Starting your Training

On the My Learning Page, click the **Start Training** button to begin taking training.

Once you have completed the lessons in the modules, the module is added to the column on the right under the Completed header, see Figure 13. You must then open up the general course description under the Completed header to take your certification test.

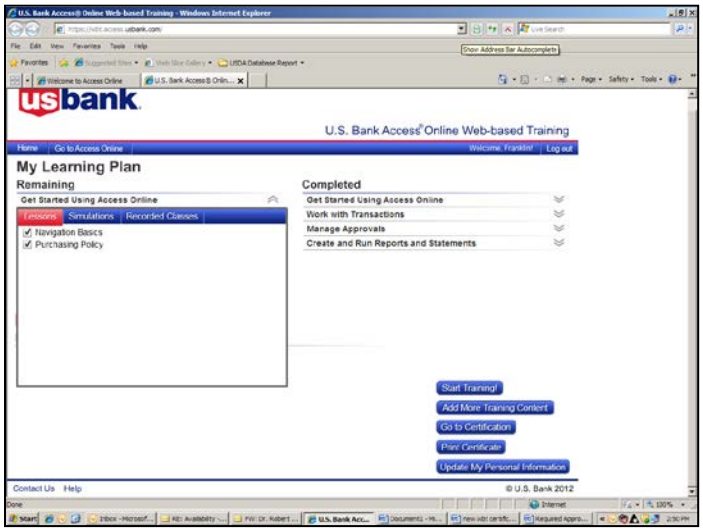

Figure 13. Completed Modules Page

5 Taking your Certification Tests

1. Expand each link under the Completed header (on the right) to view and select the modules ready for certification, refer to Figure 14.

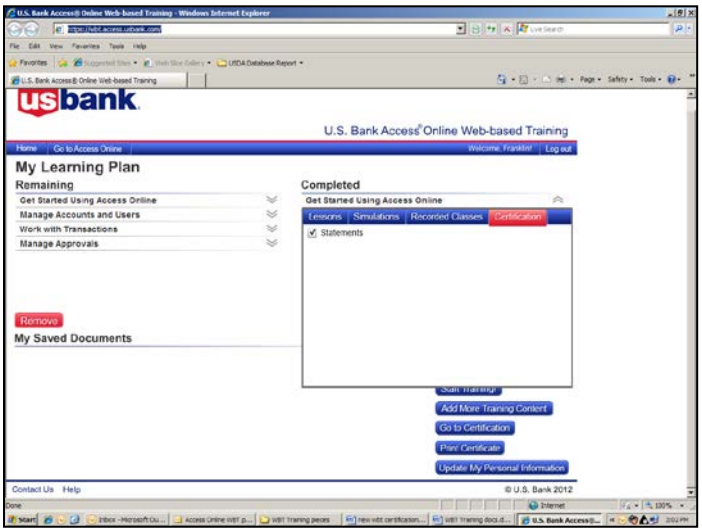

Figure 14. Taking your Certification Tests

2. Click the **Go to Certification** button at the bottom right of the screen and begin taking the certification test.

   Upon completing the certification test for the modules, the system displays the Certification Exam Results page, refer to Figure 15.

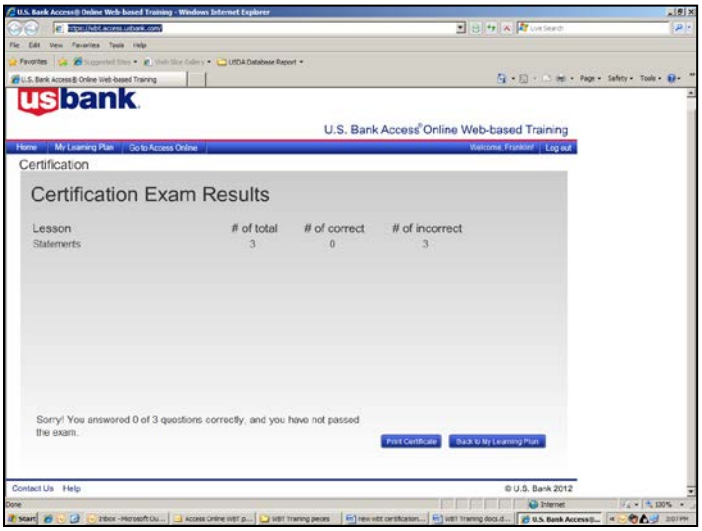

Figure 15. Certification Exam Results Page

Your test results display at the bottom of the page. You are required to answer all questions correctly to pass the exam. If you have not passed the test, you need to click the **Back to My Learning Plan** button and retake the test again. You must complete this step as many times as necessary, until you obtain a passing score.

6 Printing your Certification

Once you have passed the test, the system display the Certification Exam Results page with the "Congratulations" notification at the bottom of the screen, see Figure 16.

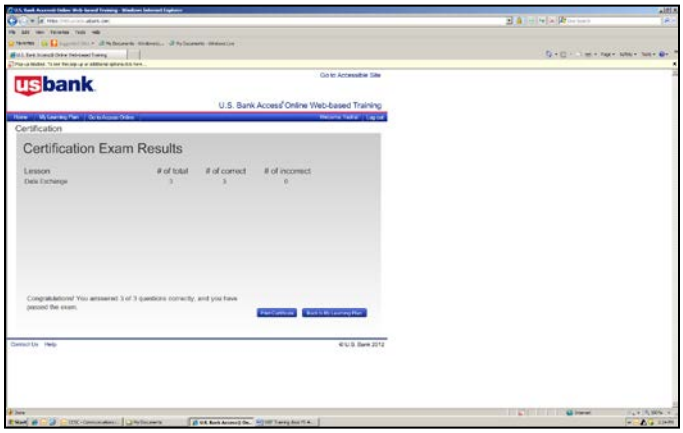

Figure 16. Passed the Test Notification

Upon successfully completing all training modules with a passing score, click the **Print Certificate** button to obtain a copy of the Certificate of Completion.

Please note that the Certificate of Completion lists all training modules completed according to the role (i.e., APC/LAPC/AO/Cardholder), as Figure 17 displays.

Figure 17. Example Certificate of Completion

If all training modules have not been completed, the user must return to the appropriate module and complete the missing modules.