# AICPA Learning Navigator 2.0 User Guide

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# Introduction to AICPA Navigator

The American Institute of Certified Public Accountants (AICPA) Navigator is an award-winning web-based application platform that supports your organization's learning and development goals by enabling users to access rich content, compliance guidelines, and competency requirements from a single, secure source on their desktops and mobile devices.

Learning and development can be planned, implemented, tracked, and assessed. The Navigator's Compliance Tracker tracks every learner's certification and recertification completion timelines and requirements in all supported states and jurisdictions, keeping track of jurisdictional changes to ensure that accounting professionals meet the continuing professional education requirements for licensure.

Advanced search features enable learners to find courses easily with the limitless search engine. The user's unique set of permissions determines the learning content they can view.

Students can enroll, or be enrolled, in courses. If courses require approval, students can easily submit requests for approval through the Navigator. Students can also be assigned training by managers in the Navigator.

Students can instantly access their assigned and selected learning content, view their training record and transcripts, and print certificates for completed courses.

# Access AICPA Navigator

**Login Access**

1. To access the Navigator, in the browser address bar, enter the Navigator URL provided to you by your administrator.
    - In **Entity ID,** enter the ID of your firm that you received from your administrator.
    - In **Login ID,** enter the administrator login ID that you received from your administrator.
    - In **Password,** enter the password for the administrator login ID that you received from your administrator. Note that the password is case-sensitive.
2. The following web browsers are currently supported:
    - Microsoft® Internet Explorer® versions 8-11
    - Google Chrome™ versions 36-41
    - Apple® Safari® version 3.2.3-4.0 (PC) and 8.0 (Mac)
    - Mozilla Firefox 30-33

Click on the **Log In** button. The Navigator opens, displaying the Training Home page.


There are a set of navigation tabs below the company logo, which enable the user to access specific system functionality.

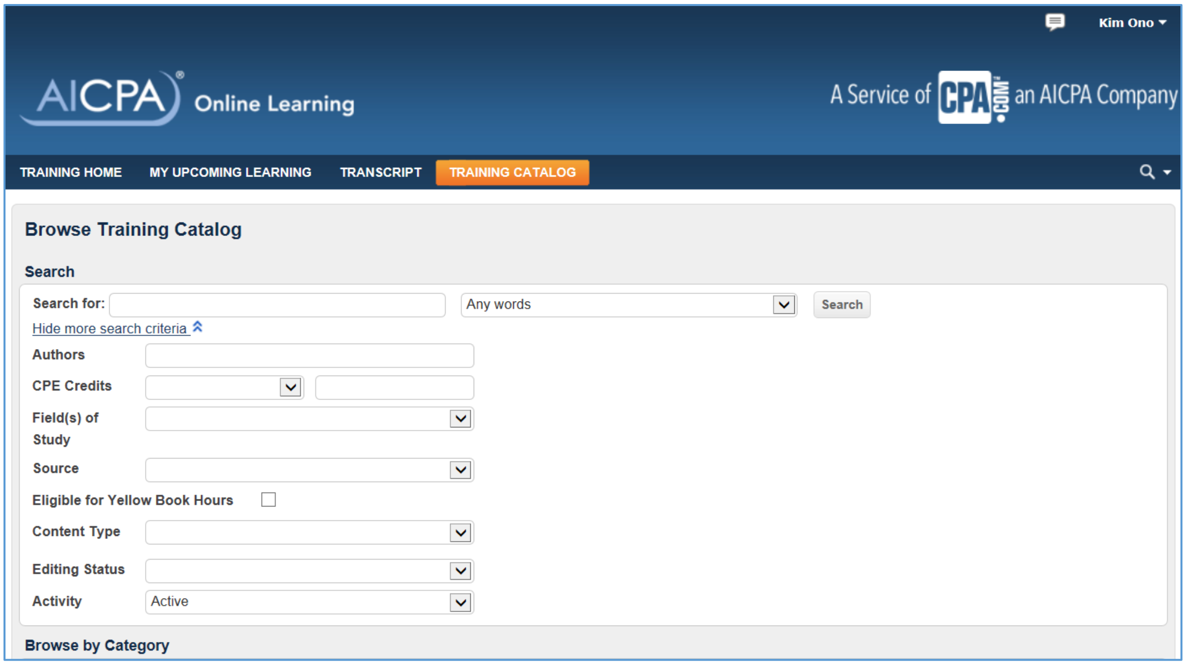
**Navigation Tabs**

The navigation tabs enable access to course information, transcript, certificates, development plans, and search functionality.

- **Training Home** navigation tab (default), a dashboard that displays recent courses in which the user is participating and links to other useful pages.
- **My Upcoming Learning** navigation tab, which shows courses in which the user is participating.
- **Transcript** navigation tab, which displays information about training and certificates.
- **Training Catalog** navigation tab, which is used to search for Navigator content.

| **Training Home** |
| --- |
| The Training Home page is the default page. It displays Navigator announcements and user-relevant links to enable quick access to courses that the user has recently accessed or completed. Buttons are provided to access more complete course information and additional functionality.<br><br>The following sections are available for display on the Training Home page. You may not see all the information but will be available optionally based on your administrator's choice:<br><br>• My Upcoming Learning: Recently started, not started, and enrolled in. For each item, the status type, field of study, and credit hours are displayed, along with buttons for available actions. For example, the Resume button is displayed for items that the user has started but not completed. Items can be filtered by status. The full list of the user's upcoming learning can be accessed via the View All My Upcoming Learning button, which opens the My Upcoming Learning page. (The My Upcoming Learning page can also be accessed via the My Upcoming Learning tab.)<br>• Required Training:  This is a subset of My Upcoming Learning. These courses are assigned by your manager or administrator<br>• Curriculums: This is a subset of My Upcoming Learning. Number of accessed curriculums and their status. The full curriculums list can be accessed via the View Details button, which opens the Transcript page. (The Transcript page can also be accessed via the Transcript tab.)<br>• *My Completed Training*: Recently completed training items. The official certificate for the course can be viewed via the **View Certificate** button. The full list of completed training items can be accessed via the **All My Training** button, which opens the **Transcript** page. (The Transcript page can also be accessed via the **Transcript** tab.)<br>• *Search*: Search field for training and non-training content. Advanced search criteria fields are available on the Training Catalog page, which is accessed via the **Training Catalog** tab.<br>• Browse Bundles: Bundles available for selection. |

## Training Catalog



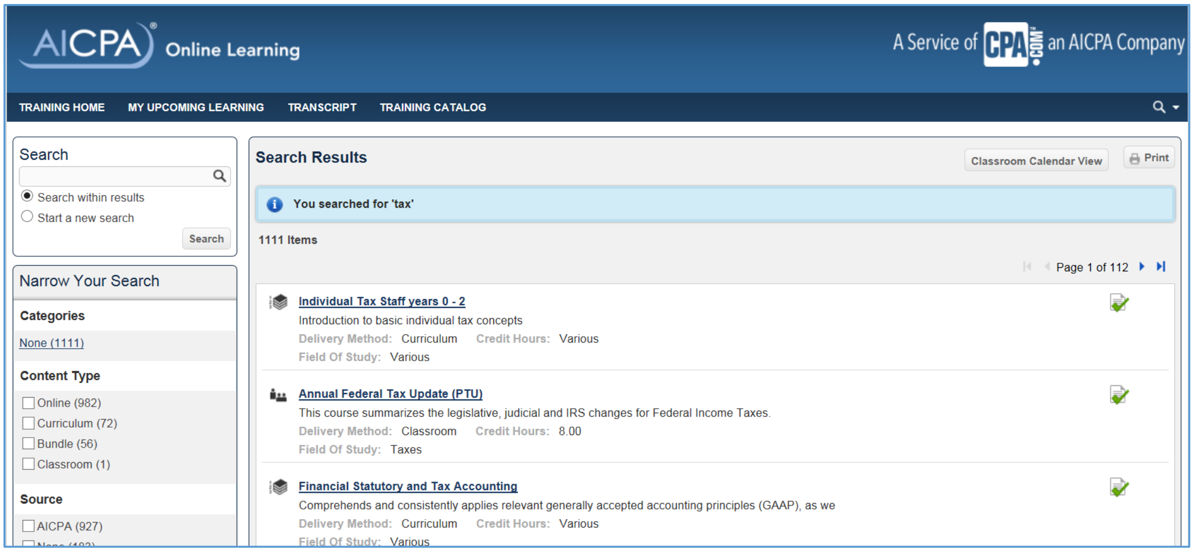

The Training Catalog page is used to search for all Navigator content – training and non-training. Course bundles, curricula, and certifications also appear in search results.

The **Search** button must be used to display search results; this page is blank when it first opens. The system is designed to allow searches to be conducted without search criteria, but entering search criteria helps to narrow search results.

Fields are available for conducting simple or advanced searches, when you click on the **See More Search Criteria** link. When conducting simple searches, the system searches the following fields: Title, Description, and Keywords.

Once the search results are displayed you can further filter to narrow the results by entering additional criteria in the upper left search box. The results can allows be further narrowed by content type, categories or source.

## Training Catalog

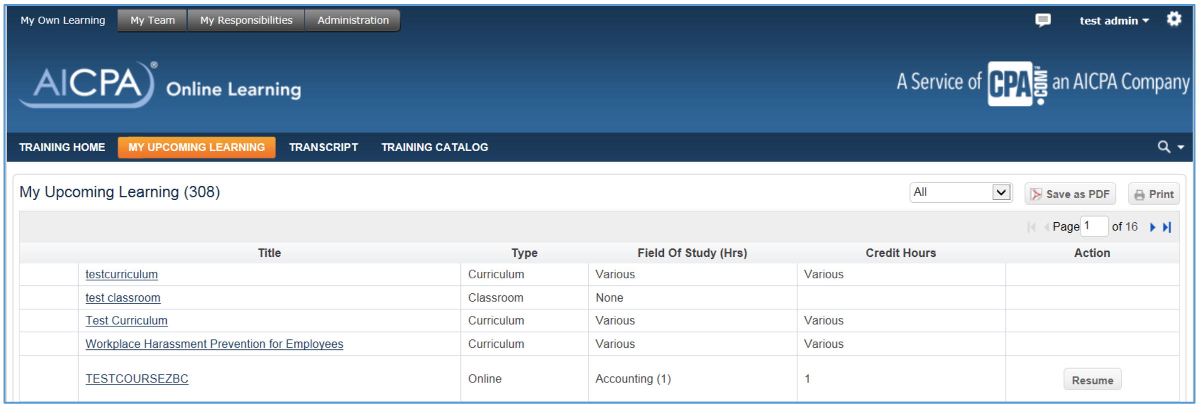



Search results provide a link to the item and information such as description, delivery method, field of study, and credit hours.

Clicking the title of an item in the search results opens the course enrolment page, which displays the appropriate button: the **Open** button if self-enrollment is allowed.

The Browse by Category area displays available training item categories and items in each category.

## My Upcoming Learning



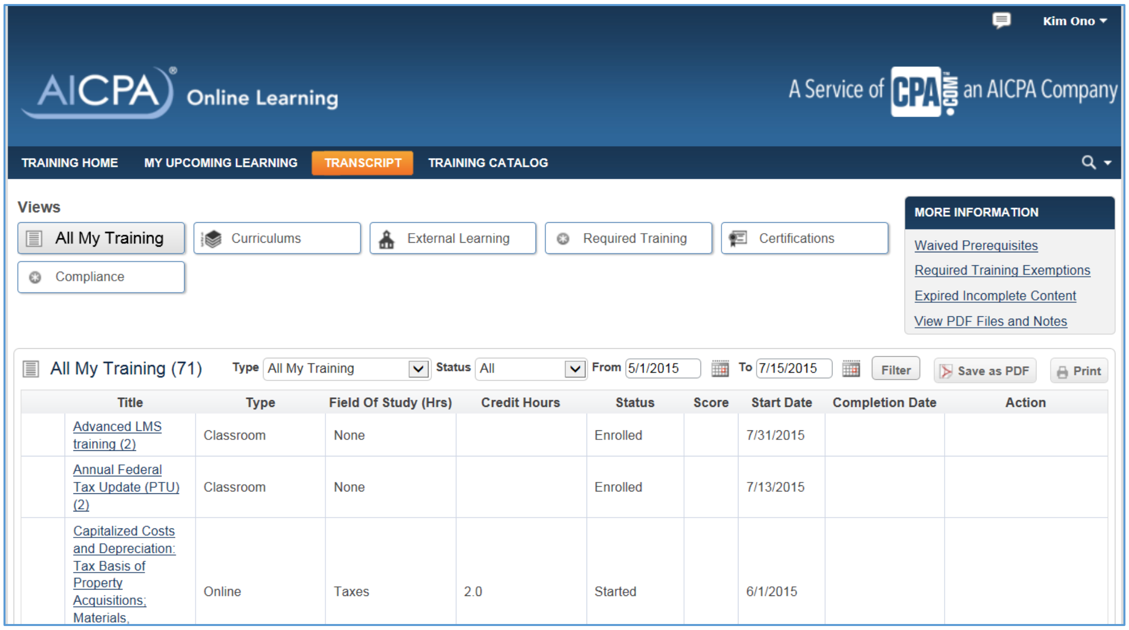

The My Upcoming Learning page displays the complete list of training content in which the user is participating or has been assigned as follows:

- Started but not completed (status: *Started*);
- Not started but enrolled in (status: *Not Started*);
- Enrolled in by manager as required, and not started. (status: *Enrolled*);

Item titles in the list function as links that open the course/course grouping enrollment page relevant to the user. For example, the course enrollment page for a *Started* online course displays the **Resume** button, for a *Not Started* online course displays an **Open** button, and for an *Enrolled* online course, the **Open Item** button. For classroom courses, a detail page opens showing progress and completion details and specific instructions on next steps. The list also shows the type, field of study, and credit hours for each item.

The list can be filtered by item status. It can also be printed or saved as a .pdf file.

## Transcript




The Transcript page is used to access the training transcript. The online transcript displays all the courses and course groupings that the user has completed. It also displays courses that the user has started but not completed.

Training items are listed in order of the date on which the user started the course. Besides the title, the transcript also displays the type, field of study, credit hours, status, score, and start/completion dates for each course/course grouping. Buttons are provided for available actions. For example, the **View Certificate** button displays for completed courses and opens the official certificate of completion; the **Resume** button displays for courses that have been started but not completed.

Additional selections are available on the top of the page to enable filtering: **All My Training** (the default), **Required Training**, **Curriculums**, **Certifications,** and **External Learning**.

The online transcript can be printed or saved as a .pdf file.

The transcript page also provides the option to view any waived prerequisites, required exemptions and expired incomplete content if necessary. The user can also access PDF files and notes attached to the user's transcripts from this page.

## Compliance

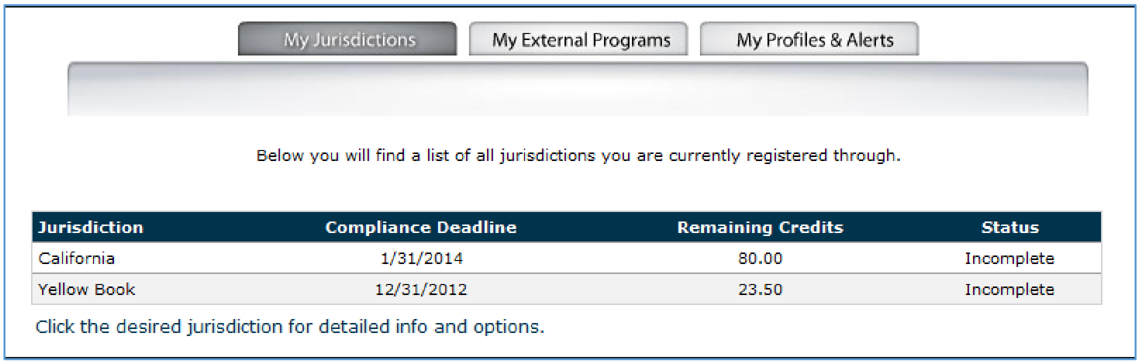
Depending on your system's settings, users may set their own jurisdictions and courses for tracking. If you're unable to modify any of this information, please contact your system administrator to have your information updated.

Note: Please make sure your pop-up blockers are not on. Or allow pop-ups temporarily.

1. Click *My Transcripts.*
2. Click on the *Compliance* tab
3. Click on the *Get Compliance Record*

## Transcript

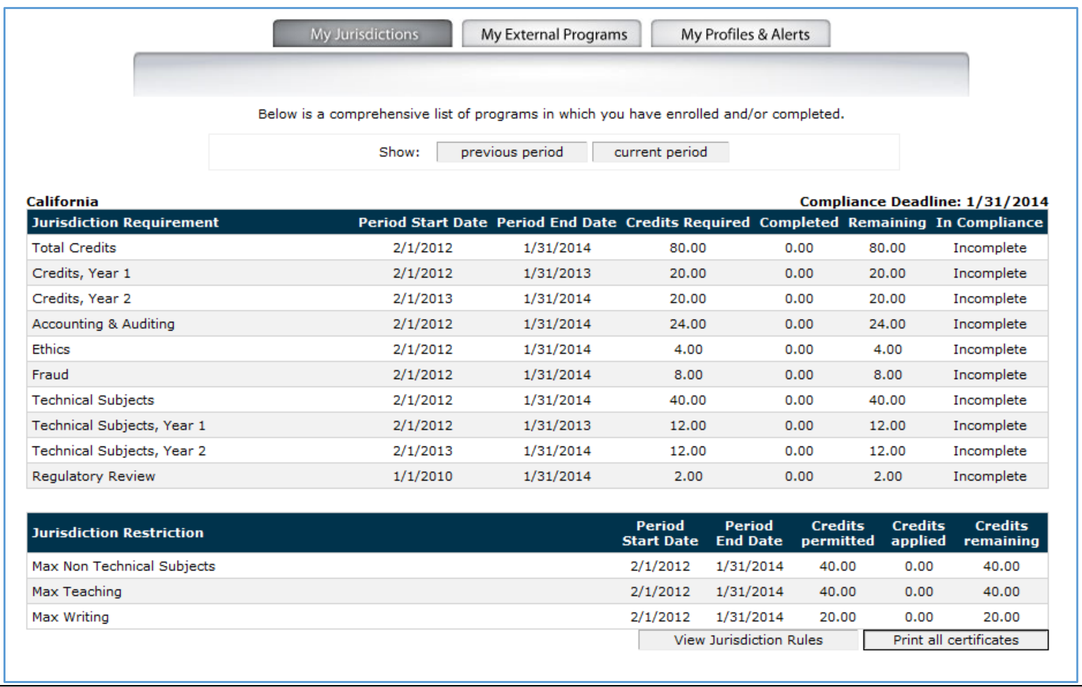
4. This will connect you to the compliance engine of the system




| Jurisdiction | Compliance Deadline | Remaining Credits | Status |
|---|---|---|---|
| California | 1/31/2014 | 80.00 | Incomplete |
| Yellow Book | 12/31/2012 | 23.50 | Incomplete |



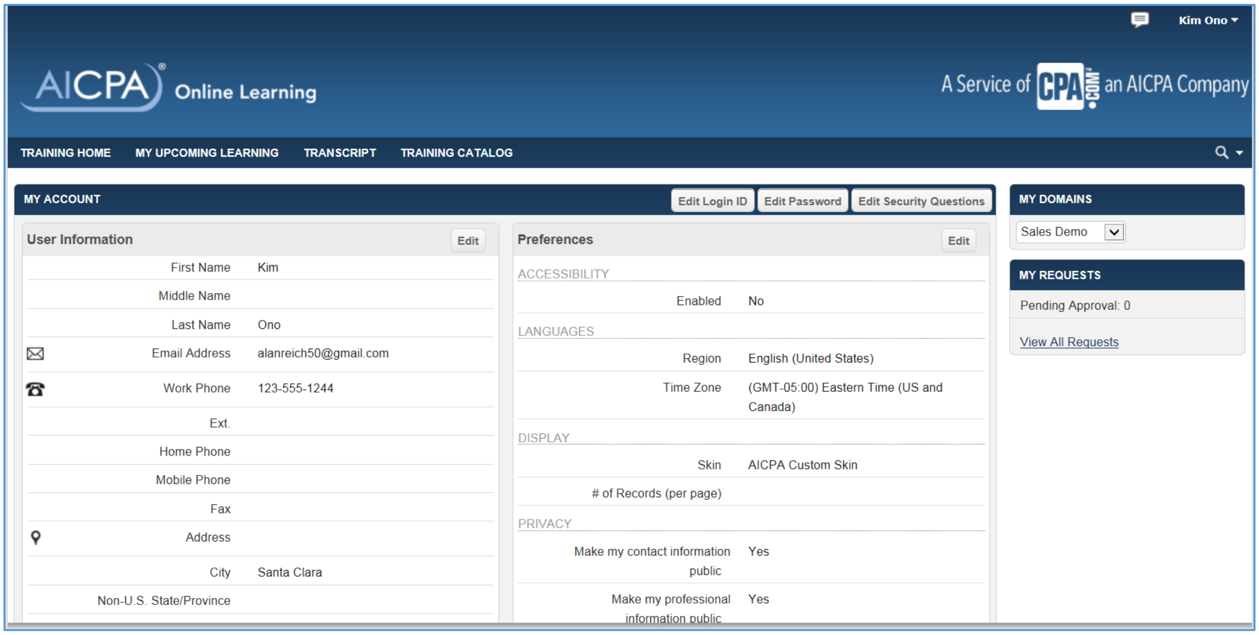
5. Click on the jurisdiction to display the specific requirements, restrictions, and the summary of what has been completed and what is remaining.




| Jurisdiction Requirement | Period Start Date | Period End Date | Credits Required | Completed | Remaining | In Compliance |
|---|---|---|---|---|---|---|
| Total Credits | 2/1/2012 | 1/31/2014 | 80.00 | 0.00 | 80.00 | Incomplete |
| Credits, Year 1 | 2/1/2012 | 1/31/2013 | 20.00 | 0.00 | 20.00 | Incomplete |
| Credits, Year 2 | 2/1/2013 | 1/31/2014 | 20.00 | 0.00 | 20.00 | Incomplete |
| Accounting & Auditing | 2/1/2012 | 1/31/2014 | 24.00 | 0.00 | 24.00 | Incomplete |
| Ethics | 2/1/2012 | 1/31/2014 | 4.00 | 0.00 | 4.00 | Incomplete |
| Fraud | 2/1/2012 | 1/31/2014 | 8.00 | 0.00 | 8.00 | Incomplete |
| Technical Subjects | 2/1/2012 | 1/31/2014 | 40.00 | 0.00 | 40.00 | Incomplete |
| Technical Subjects, Year 1 | 2/1/2012 | 1/31/2013 | 12.00 | 0.00 | 12.00 | Incomplete |
| Technical Subjects, Year 2 | 2/1/2013 | 1/31/2014 | 12.00 | 0.00 | 12.00 | Incomplete |
| Regulatory Review | 1/1/2010 | 1/31/2014 | 2.00 | 0.00 | 2.00 | Incomplete |

| Jurisdiction Restriction | Period Start Date | Period End Date | Credits permitted | Credits applied | Credits remaining |
|---|---|---|---|---|---|
| Max Non Technical Subjects | 2/1/2012 | 1/31/2014 | 40.00 | 0.00 | 40.00 |
| Max Teaching | 2/1/2012 | 1/31/2014 | 40.00 | 0.00 | 40.00 |
| Max Writing | 2/1/2012 | 1/31/2014 | 20.00 | 0.00 | 20.00 |

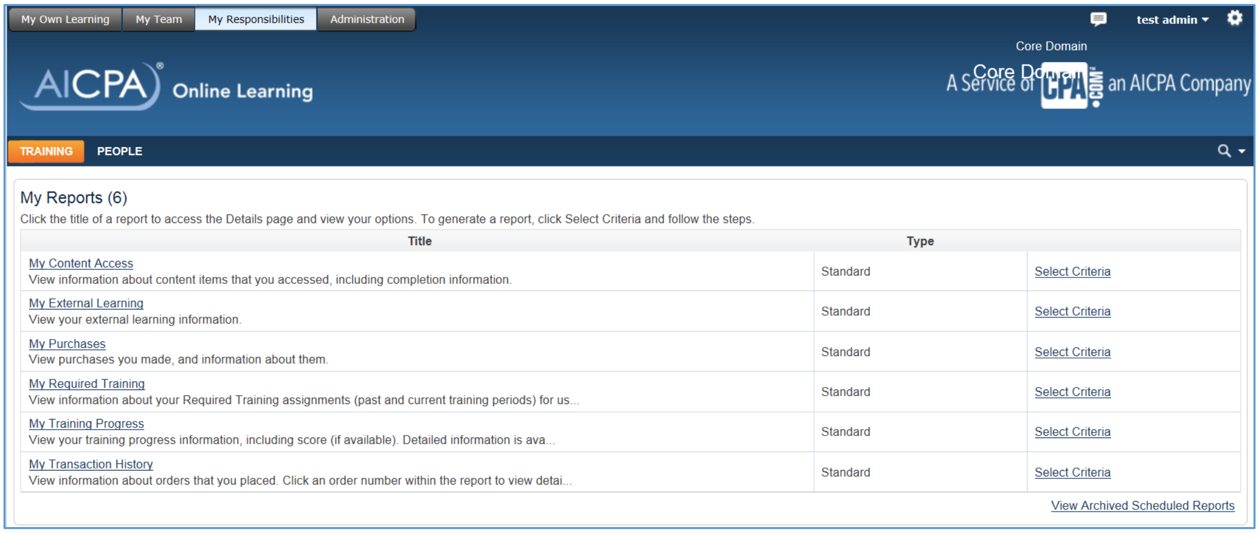
## My Account




Pull down the user's name in the top right hand corner of the screen and click on the My Account link. This opens the logged-in user's My Account page containing user information for the logged-in user. The user can view and edit (if permission is granted) profile data such as:

- login ID, password, and security questions;
- contact information;
- work information (organization, job title, etc.);
- educational and professional qualifications;
- language preferences;
- display preferences;
- communication preferences for system e-mail;
- shipping information;
- roles and permissions (view only);
- current and available domains;
- requests (past, current, and content that's no longer active or accessible);
- purchases

## My Reports

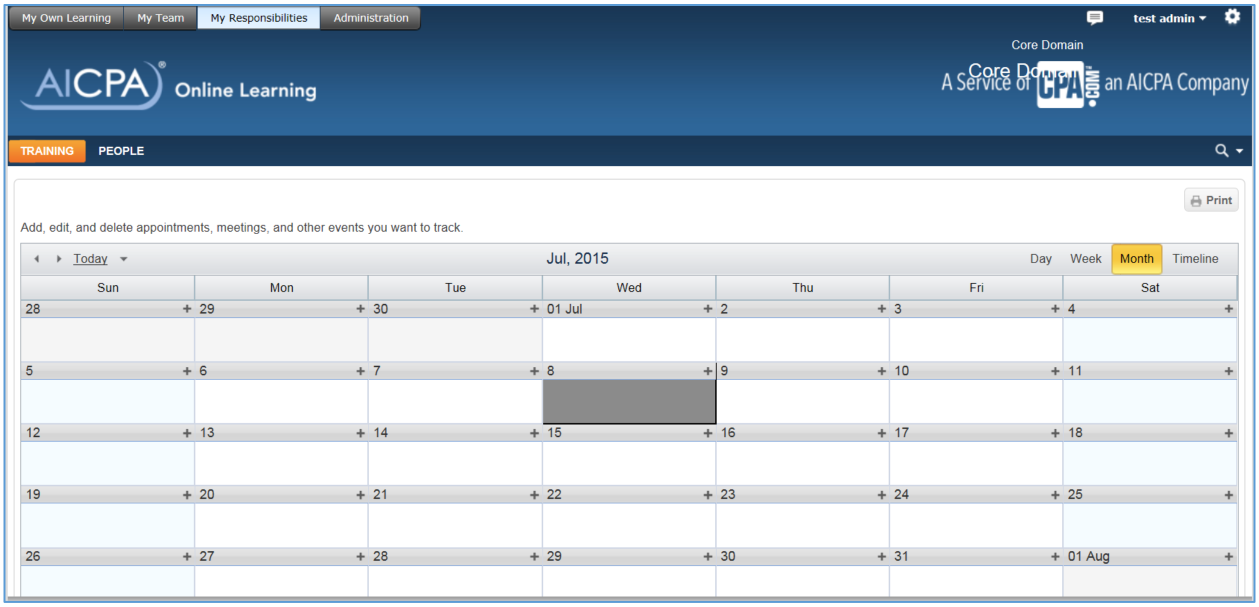



Pull down the user's name in the top right hand corner of the screen and click on the My Reports link.

This option opens the logged-in user's My Reports page, which contains user-specific standard reports on:

- content access;
- external learning;
- required training;
- training progress;
- transaction history

## My Calendar




When the calendar link is clicked, the option opens the logged-in user's My Calendar, which shows events added by the user and course sections in which the user is enrolled.

## Logout

This option enables the logged-in user to log out of the AICPA Navigator.