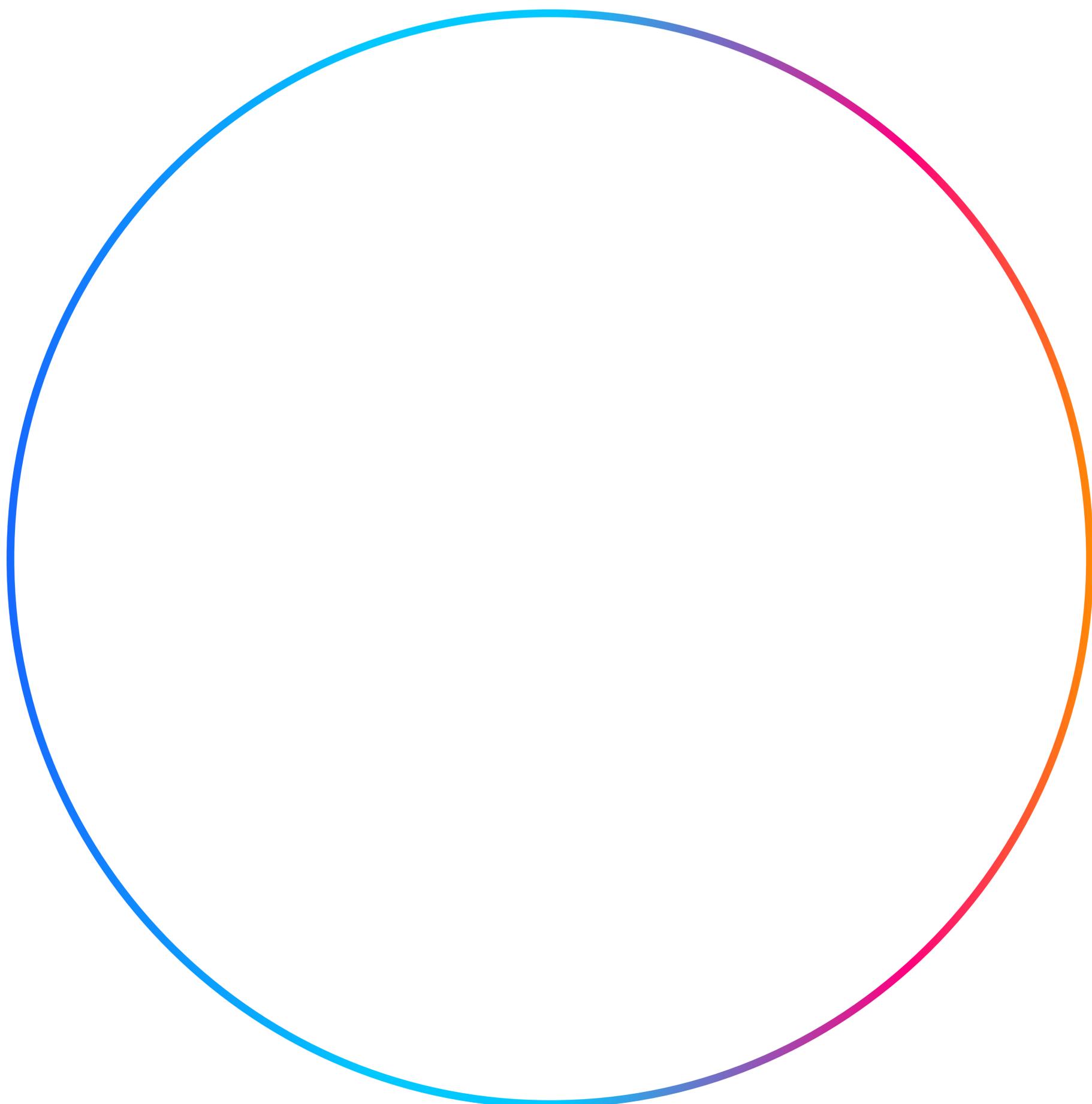# Team Captain Guide

Welcome to our Cisco Learning Credits (CLC) Program

Your organization has demonstrated a commitment to employee training and development by purchasing Cisco Learning Credits (CLCs). Once your sales order is activated in the Learning Credit Management Tool (LCMT), we automatically create your customer account.

There are multiple Team Captain roles in LCMT. Your organization may elect to have more than one Team Captain Designated Admin, in addition to other possible Team Captain roles, but you must choose someone to fill the primary role of TCDA. In addition to generally managing CLCs, the TCDA accepts the CLC terms and conditions and the Team Captain Affirmation statement on behalf of the company.

To participate in the CLC Program, your company must identify and assign at least one Team Captain Designated Admin (TCDA) to manage its learning credit account within 30 days of the time your account was created. Your Cisco Account manager will reach out to you to identify who that person should be.

A Team Captain works closely with a Cisco representative – such as a Business DevelopmentManager (BDM) or Trusted Learning Partner – to ensure your organization's training goals are achieved through effective use of CLCs.

The ideal Team Captain is:

- Dedicated

- Responsive

- Trustworthy

- Invested in IT deployment success

If you have been selected as a Team Captain, you exemplify these qualities. Your leadership plays a vital role in making sure your company's learning credits are used effectively within their one-year validity period, supporting both individual and organizational success.

This guide will help you:

- Understand your responsibilities as a Team Captain

- Learn about the different Team Captain roles and their qualifications

- Follow step-by-step instructions for using the Learning Credit Management Tool (LCMT) to manage, monitor, and track your team's Cisco Learning Credits with confidence

Use this guide as a comprehensive resource to keep your company's learning initiatives on track. For step-by-step instructions, we recommend watching the tutorials linked throughout this guide. These instructional videos walk through how to complete each task.

About Team Captain roles

Eligibility requirements for all Team Captain roles

To be assigned any Team Captain role in the Learning Credit Management Tool (LCMT), you must:

- Have an active Cisco Connection Online Identification (CCOID) profile with your first name, last name, and employer listed.
    - **Tip:** Need a CCOID? Register here. For assistance, contact Email Registration Support.
    - Watch tutorial: How to Set up a CCOID
- Use an email address aligned with your company's domain.
    - Personal email addresses (e.g., gmail.com, yahoo.com) are not allowed.
    - If your email does not match the company domain, you must create a new profile with your business email address.

The Learning Credit Management Tool (LCMT) offers three Team Captain roles:

- Team Captain Designated Admin (TCDA) – Required at all times
- Team Captain Other (TCO) – Optional
- Team Player – Optional

Team Captain Designated Admin (TCDA)

The TCDA is the primary, required role and serves as the main representative authorized to act on behalf of the company. This person is responsible for accepting the required terms and conditions, as well as the Team Captain Affirmation (TCA) on behalf of the company.

Each year, the TCDA must accept the TCA by confirming their continued employment with the company and their status as Team Captain.

TCDA responsibilities

- Accept the Cisco Learning Credit terms and conditions and the Team Captain Affirmation (TCA) in LCMT as soon as you are assigned to the role and recertify each year.
- Choose from a list of Trusted Cisco Learning Partners to help build your training plan.
- Contact your assigned BDM to purchase additional credits as required for the training plan.
- Log into LCMT regularly to ensure all CLCs are redeemed before they expire.
- Review your monthly CLC statement and any customized updates.
- Review and approve or deny CLC transactions within 60 days.
- Request to add or remove individuals who help manage the LCMT account

TCDA qualifications

To qualify as a TCDA, the individual must:

- Be an employee of the company participating in the CLC Program

- Be authorized to act on the participating company's behalf

Learn about the other Team Captain roles in the next section.

Other Team Captain roles

In addition to the Team Captain Designated Admin (TCDA), the Learning Credit Management Tool (LCMT) supports two additional roles: Team Captain Other (TCO) and Team Player. Review the following details to determine if these roles are needed for managing your company's Cisco Learning Credits.

Team Captain Other (TCO)

The TCO is an optional role. If your company has a managed service agreement, a TCO may be appointed to assist in managing Cisco Learning Credits (CLCs). The TCO can view, approve, deny, and oversee CLC activities, helping to safeguard against potential fraudulent use.

Important:

- The TCO can only be assigned by the TCDA and only after the TCDA has accepted all required terms and conditions and the Team Captain Affirmation (TCA).

- The TCO is only able to work in LCMT as long as there is an active TCDA on the account.

TCO qualifications

To qualify as a TCO, the individual must:

- Be appointed by the TCDA

- Be an employee outside of the company participating in the CLC Program

- Be authorized to act on the participating company's behalf

The Team Player serves as additional support for the TCDA , TCO, or both.

Team Player responsibilities

- View and monitor CLC activity as needed.

Team Player qualifications

- Be appointed by the TCDA.

Request to assign, update, or change a Team Captain

Now that you are familiar with the different Team Captain roles and have accepted the required terms and conditions and Team Captain Affirmation (TCA), you can assign, update, or change a Team Captain as needed.

Watch tutorial: [How to Request a Team Captain Role Assignment](#)

About the Learning Credit Management Tool (LCMT)

Cisco provides the Learning Credit Management Tool (LCMT) to help Team Captains effectively manage Cisco Learning Credits and maximize their use. LCMT is a dedicated, user-friendly platform that serves as the central resource for all Cisco Learning Credit (CLC) activities.

Through LCMT, Team Captains can easily monitor, manage, and track their organization's Learning Credits, ensuring they are used efficiently before they expire.

Tip: For the best user experience, access LCMT using Chrome, Firefox, or Edge browsers. Access the Learning Credit Management Tool (LCMT)

To access LCMT, follow these steps:

1. Using Chrome or Firefox or Chrome, navigate to cisco.com/go/lcmt

2. At the login window, enter your cisco.com username and select Next.

3. Enter your cisco.com password and select Log in.

4. Review and accept the Terms and Conditions, then confirm the Team Captain Affirmation.

Note: If you decline these terms, you will not be able to access your account details.

1. Once logged in, the Learning Credits Management dashboard displays your account balance, transactions, expiration dates, and any open action items.

Watch tutorial: [LCMT Dashboard Overview for Team Captains](#)

Accepting the Terms and Conditions and Team Captain Affirmation (TCA)

If you are assigned the role of Team Captain Designated Admin, your immediate responsibility is to promptly accept the Terms and Conditions (T&C) and the Team Captain Affirmation (TCA) on behalf of your company. This is also the perfect time to select a Trusted Learning Partner (TLP). Your TLP can assist in developing a curriculum plan tailored to your team's training needs, ensuring your Cisco Learning Credits are used intentionally to support your business goals.

Note: Federal customer accounts are not eligible for the TLP program.

Watch tutorial: [Accepting Terms and Conditions and TCA in LCMT](#).

Once you have accepted the Terms and Conditions and TCA, you will have full access to LCMT to approve, deny, and manage your company's Cisco Learning Credits.

Cisco Learning Credits (CLC) lifecycle

As a Team Captain, it's essential to understand the lifecycle of Cisco Learning Credits (CLCs). Each CLC has a limited validity period of 365 days, so careful planning is required to ensure credits are used before they expire. This includes organizing training sessions, planning for Cisco Live attendance, and promptly reviewing transaction requests.

The above is made easy when you select a Trusted Learning Partner (TLP) within LCMT to support you. Your selected Trusted Learning Partner can help to develop a learning plan that meets your organization's unique goals. Your TLP will ensure that your team has the skill set they need with certification and product training, access to real-work and practical experience with hands-on learning tools, multiple chances to practice or assess what they've learned, and so much more,

You will see a link on your LCMT dashboard to select a Trusted Learning Partner. Once you click on this link, you will have the opportunity to select a TLP from a list of those available by country. You can pick multiple TLPs across multiple countries if desired. You can also update or remove a TLP from your account at any time.

Watch tutorial: How to choose a Trusted Learning Partner (coming soon)

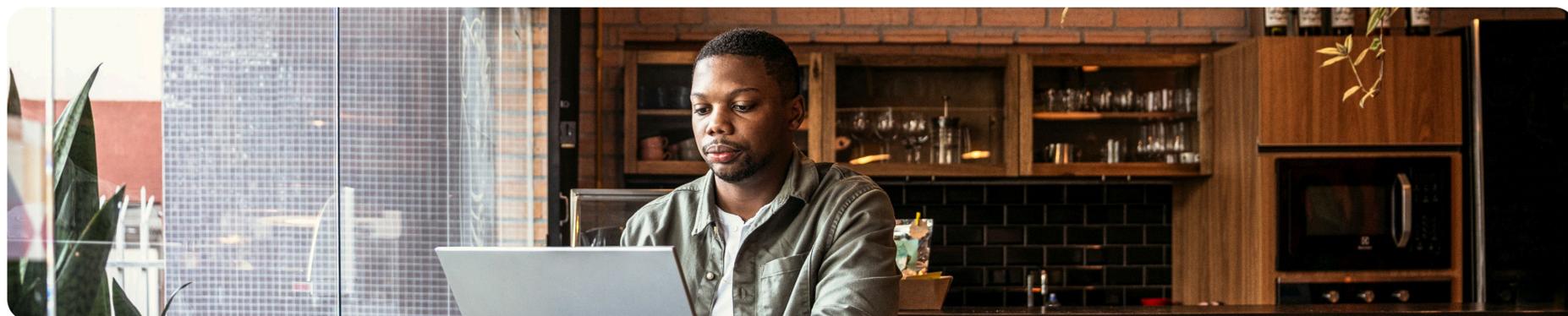## Using your Cisco Learning Credits (CLCs) for training

You can redeem Cisco Learning Credits (CLCs) for a wide range of Cisco-authorized training courses to help your organization build and maintain technical expertise. When using CLCs for training, the credits must be active on the first day of the scheduled training session.

To explore Cisco's extensive training offerings, visit the [Cisco Learning Credits site](#).

Watch tutorial: [How to Redeem Your CLCs](#).

A Team Captain or Team Captain Other must approve or deny CLC transaction requests within 60 days of submission and at least three working days prior to the class start date. If no action is taken within these timeframes, the following will occur:

- Cancellation: LCMT will cancel the CLC transaction, and the learner will be removed from the class.

- Auto-refund: LCMT will automatically refund the CLCs.

- Expired credits: CLCs that have passed their expiration date will be refunded as expired; however, they will be unusable if they are returned to a sales order that has expired.

- Notifications: Automatic notifications with transaction details will be sent to the TCDA.

- Class start date: CLCs will be auto-refunded if, within the 60-day window, they remain unapproved three working days before the class start date.

- Sales order status:

  - If the refunded sales order (SO) has expired, reissuance will follow standard program guidelines. Contact your Business Development Manager (BDM) for assistance.

  - If a reissued SO has expired, those CLCs will no longer be usable.

  - For valid training that still requires payment, a new SO number must be provided to Cisco.

Using your Cisco Learning Credits (CLCs) for Cisco Live registration

Cisco hosts three Cisco Live events each year: Cisco Live Global, held in the United States; Cisco Live Melbourne; and Cisco Live Amsterdam. As a Team Captain, you can redeem Cisco Learning Credits (CLCs) for registration at any of these events, offering valuable opportunities for training, networking, and professional development.

When using CLCs for Cisco Live events, the credits do not need to be valid beyond the event date—they simply must be active at the time of registration.

For more information and to register, visit the [Cisco Live page](#).

Watch tutorial: [How to Use CLCs for Cisco Live Registration](#)

Approving or denying CLC transaction requests

Watch tutorial: [How to Approve or Deny Transactions](#)

To prevent any disruption to training, Team Captains must make timely approval decisions on all transaction requests. If a request is neither approved nor denied after 30 days, LCMT will send notifications with transaction details and a call to action.

Tip: To avoid unnecessary auto-refunds and ensure all credits are used as intended, Team Captains should regularly review and approve reservation requests. Proactive management helps maximize the value of your company's CLC investment and minimizes the risk of training disruptions.

Setting up automatic CLC approvals

To help streamline the approval process and avoid unnecessary auto-refunds, Team Captains can set up automatic approvals for CLC requests in some or all accounts. Follow these steps:

1. Select the Transactions tab, then select Approve Debits.

2. Select Auto Approve Debits. The Auto-Approve Debit Transactions screen displays with all accounts that you are assigned as Team Captain.

3. Select Enable to either select or deselect all accounts you wish to auto-approve.

   - Checking a box means that the Team Captain takes no action when Cisco submits a debit request for that account. Reimbursement is automatic.

   - Unchecking all boxes means that the Team Captain manually processes every request.

4. Select Save to update the automatic approvals.

   - If you select automatic approval, you will be reminded of your selection annually.

     Note: If any Team Captain on the account selects automatic approval, all approvals will be automatic.

Distribute your CLCs from Prime to Branch accounts

If you would like to distribute and use CLCs within your organization without permanently combining accounts or assigning CLCs to a specific branch or department within an existing account, Prime-Branch account linkage may be a viable solution. This allows Team Captains to initiate a one-way push of Cisco Learning Credits (CLCs) to be distributed and used across multiple Branch Accounts. You and/or your Cisco Account Manager can request that a Prime-Branch linkage be set up in LCMT.

Your Prime account is the original account where you can track and distribute your CLC purchases. Each Branch account is used to manage CLCs for a department or unit of your organization without needing to purchase them separately per branch. After you distribute CLCs to a Branch, the Team Captain assigned to that Branch account can manage how they are used in that department.

After your Prime and Branch accounts are linked, a Team Captain can distribute CLCs across multiple Branch accounts.

How a Prime to Branch link works

After your link is set up, note the following:

- Transfers can only be initiated one way from the Prime account to the Branch account and can't be made from the Branch account to the Prime.

- All transfers are final.

- CLC expiration dates and reissue rules remain unchanged.

- The Team Captain Designated Admin (TCDA) assigned to the Branch account must manually or automatically approve all CLC requests.

What it takes to qualify for a Prime-Branch link

You must provide information for the TCDA assigned to the Branch when you request the link to be set up. CLCs must belong to the same legal entity and have the same GUID. You can't combine sales orders from different Cisco Prime accounts.

Submit your request to link Prime and Branch accounts

To link your Prime account to branches, submit a request via the Learn with Cisco Centralized Support Tool with the Cisco Learning Credits Team and provide the following information:

- Prime account name

- Branch account name for each branch account to be created

- GUID information and relationship of the accounts

- Sales order number(s)

- Team Captain details for both accounts with respective approval(s)

To ensure that the links are set up correctly:

- Both the Prime and Branch accounts must have an active TCDA assigned.

- If you are setting up more than one Branch account, it is crucial to state this in the case.

- If you already have a Branch account and would like another, please indicate this in the case as well.

Transferring CLCs from the Prime to Branch account

After the accounts are linked, the Team Captain Designated Admin for the Prime account will be able to enter the sales order with the CLCs they want to pass to the Branch account(s).

To transfer CLCs from the Prime account:

1. Navigate to the Accounts tab to see which Prime account has been set up.

2. Note the sales order (SO) number you want to transfer to the Branch account.

3. Select the Transactions tab, then Transfer Credits.

4. At the SO number prompt, enter the entire the sales order number that you want to use.

5. Select Submit.

6. To transfer credits to the Branch account, enter the number (in whole units) of CLCs to be transferred.

7. Select Submit.

Once the CLCS are successfully transferred:

- Credits are deducted from the Prime account's sales order balance.

- A new sales order number is created under the Branch account that is the source sales order number with a suffix.

- Only the Team Captain Designated Admin (TCDA) for the Branch account can view the transferred balance on the new sales order.

- All expiration dates remain unchanged.

- To denote that it is part of the Branch account, all Branch account sales orders will have a suffix appended to the end of the sales order number (for example: "12345678-BA1")

If you are a TCDA for a Branch account, you manage and approve your CLCs the same as your other accounts.

Reporting

As a Team Captain, having access to accurate and timely information about your account transactions is essential for effective management of your Cisco Learning Credits. The Learning Credit Management Tool (LCMT) provides robust reporting features, allowing you to monitor, track, and analyze your organization's learning credit activities with ease.

Reporting should be a regular management activity. Running reports frequently helps you quickly identify issues, expired credits, or unusual transactions that may require prompt attention.

To generate a report of your account transactions:

1. Go to the Transactions tab and select Search Transactions.

2. In the search results, select the EXCEL icon.

3. The system automatically downloads an Excel report of your transactions.

Use these reports to stay informed and ensure all credits are managed efficiently.

Extension requests

We understand that sometimes circumstances beyond your control may prevent you from using Cisco Learning Credits (CLCs) before they expire. To support you, dedicated Business Development Managers (BDMs) are available to help ensure that you use your CLCs before they expire.

Restricted Reissue Policy

Cisco Learning Credits sales orders are subject to the Restricted Reissue Policy. Our Terms & Conditions indicate that CLCs are effective for one year, and reissues are granted only at the discretion of Cisco. All reissue requests can only be submitted by a Cisco Business Development Manager (BDM). Requests are reviewed on a case-by-case basis, and reissues are only granted for a limited number of circumstances.

If it is determined that there is enough justification for the request, the assigned BDM will submit the reissue request on your behalf. Once submitted, the Team Captain will be notified and will be required to review and approve the submission in LCMT for the request to be considered.

In certain cases, your BDM may be able to help you explore alternative ways to redeem your CLCs before they expire. Email your BDM for help developing a plan to use your credits or for assistance requesting an extension or exception. If you don't know who your assigned BDM is, perform a BDM Lookup in the Accounts section of LCMT and follow the instructions.

If you are unsuccessful in performing the lookup, reach out to the BDM Team by emailing learning-bdm@cisco.com.

Get support

For more information on the Cisco Learning Credits Program, including frequently asked questions, visit [Learn with Cisco Centralized Support](#).

To explore Cisco's extensive training offerings, visit the [Cisco Learning Credits site](#).

For assistance with creating a learning plan, select an approved Trusted Cisco Learning Partner from the Action Items section of your dashboard. Navigate to the Account tab, then select the Trusted Learning Partner tab to view the full list.

If you need assistance purchasing additional CLCs to fulfill your training needs, perform a BDM lookup from the Accounts section of the Learning Credit Management Tool (LCMT) or contact the BDM Team by emailing [learning–bdm@cisco.com](mailto:learning-bdm@cisco.com).

For assistance with using the Learning Credit Management Tool (LCMT), adding additional users to your account, or setting up a Prime Branch account, visit the [Learn with Cisco Centralized Support](#) tool.