NATIONAL TRAINING CENTER

Training Operations

Desktop Procedure

Title:	CARDS User Guide
Number:	TRN-DP-372
Revision:	3

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CONTENTS

REVISION HISTORY

Rev.	Date	Description of Revision
3	See Final Signature	• Section 3.1.1.1: – Item 2: Changed "select DOE PIV/DHS PIV/DOD CAC under Sign on with an HSPD-12 Smart Card" to "under Sign on with a Smart Card or Security Key, select DOE/DHS PIV or CAC" and replaced graphic. – Item 3: "Note: Users may be presented with several choices of smart card certificates to choose from. For guidance on which certificate to select, go to https://ntc.doe.gov/linksandresources/Choosing_the_Correct_Certificate_for_ADFS_Login.pdf": Deleted. • (Previous) Section 3.6, Previewing a SCORM Package File: Deleted and renumbered subsequent sections. • (Previous) Section 3.11, Previewing Content: Deleted and renumbered subsequent sections. • Section 3.11.1, Entering New Card Details, Item 2: – a: "The template is merely a starting point of suggested information and should be modified by the site as needed": Added. – b: Added "Controlled Unclassified Information (CUI)". • Section 3.11.4, Adding the Point of Contact: – 1st para: Changed "Other CARDS users should contact the POC if they have questions or comments about the material within the card" to "Other CARDS users should contact the POC to request course files (if unavailable) or if they have questions or comments about the material within the card". – Added "Note: It is highly recommended that sites share files by uploading them to CARDS instead of sending via email." • Section 3.13, Uploading and Deleting Files: Added "CUI" to "must not be categorized as OUO, UCNI, CUI, PII, proprietary, or confidential". • Section 3.13.1, Uploading Files: – "Note: The ability to drag files to the Drop files here window is available in Internet Explorer v.10 (and later) and in all other current browsers": Deleted. – Item 3.c "Uploading extremely large files or trying to upload too many files at one time may cause CARDS to timeout during the upload process. If this happens: 1) Try uploading smaller files or fewer files at one time. 2) Use the file selection process in Steps 1 and 2 of this section to successfully upload larger files": Added.
2	04/28/22	• Global: Updated screenshots as needed. • Section 3.1: Revised to provide guidance on using an existing account and creating a new account.
1	01/08/20	• Global changes: – Updated all screen captures and procedures for using CARDS application. – Changed "eAccess" to "AppAccess". – Removed references to "CARDS Community". • Appendix B, Role Definitions in CARDS Community: Deleted. • Reassigned document number from NTC-DP-372 to TRN-DP-372.
0	03/09/18	Original document approved.

1.0   PURPOSE

This document provides directions for performing tasks in the user role using the Course and Related Data System (CARDS) application maintained by the U.S. Department of Energy (DOE) National Training Center (NTC).

2.0   ROLE DEFINITIONS

For information about roles and permissions in CARDS, see TRN-DP-370, *NTC CARDS Administrator Guide*, Appendix A, *Role Definitions in CARDS*.
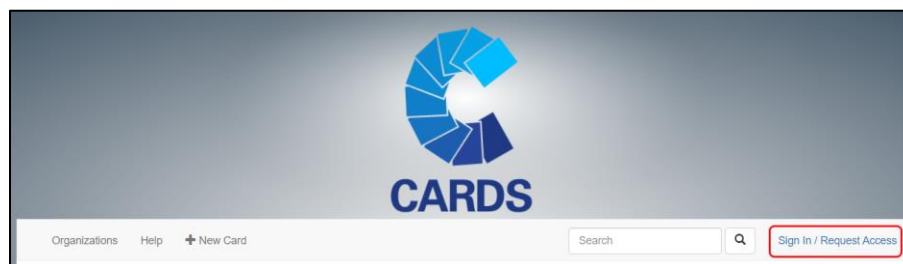
3.0   OPERATIONS

3.1   Logging in to CARDS

3.1.1   Logging in Using an Existing CARDS Account

3.1.1.1   OneID

1. Select the **Sign In/Request Access** link in the CARDS application at https://cards.ntc.doe.gov.

2. If the user has an HSPD-12 smart card, go to the OneID login portal and under Sign on with a Smart Card or Security Key, select **DOE/DHS PIV** or **CAC**.

    If the user does not have an HSPD-12 smart card, go to Section 3.1.1.2 for directions on accessing CARDS using Login.gov.
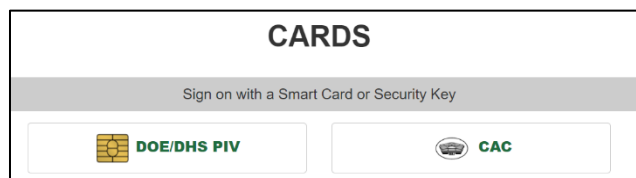
3. Select the user's certificate.

4. When prompted, enter the PIN associated with the user's HSPD-12 badge. When the PIN has been accepted, the user will be routed back to CARDS.
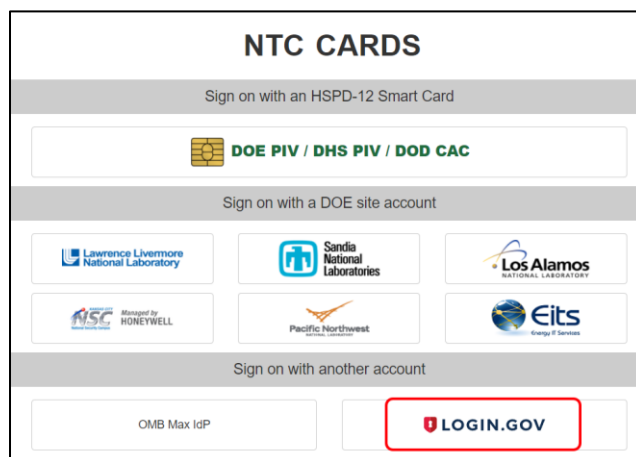
3.1.1.2   Login.gov

1. From the OneID login portal, under Sign on with another account, select **Login.gov**.

2. From the Login.gov website at https://www.login.gov/create-an-account, follow the directions on the site to create an account and password and to set up the account authentication methods. Be prepared to prove identity using a social security number, address, and/or U.S.-based state-issued identification.

3.1.2   Creating a New CARDS Account

Upon completing the OneID or Login.gov account process, users will be prompted to complete an account request form in the NTC AppAccess Portal.

1. Complete this form in its entirety.

2. Provide a detailed explanation of the user's need for access to expedite their account request.

3.1.2.1 Logging in to CARDS

1. Select the **Sign In/Request Access** link in the CARDS application at https://cards.ntc.doe.gov.
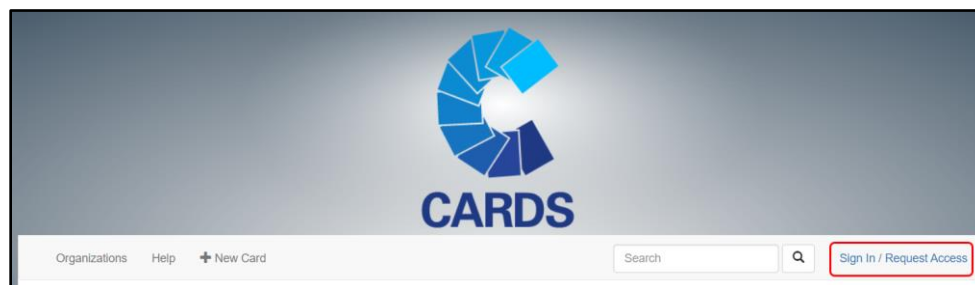
2. At the prompt, log in using the appropriate method above (see Sections 3.1.1.1 or 3.1.1.2).

3. Select **See full CARDS User Rules of Behavior** to review the rules of behavior.

4. Select **I agree to the above terms** to accept the terms of service and log in to CARDS.
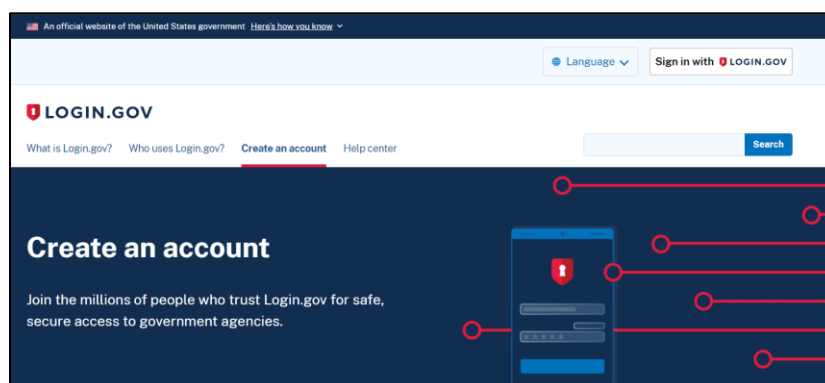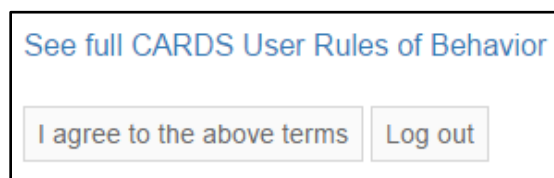
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3.2   Browsing in CARDS

Any user (with or without access to the CARDS application) can browse the cards. However, users must be logged in to view the details of a card. Users who are not logged into CARDS will be redirected to the login screen instead.

On the main CARDS page, cards are filtered and sorted by the selected criteria.
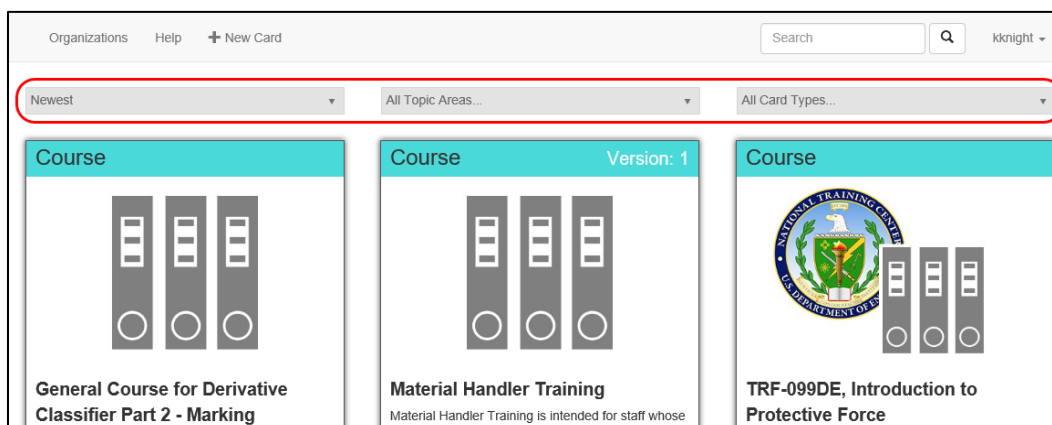
1. To sort the grid, select one of the criteria in the first dropdown list.

2. To filter the grid, select a topic area or type or card from the appropriate dropdown list.

3. To view the details of a card, select the card.

3.3   Searching in CARDS

Searching in the CARDS application can be performed in several ways. Users do not need to be logged in to search within CARDS.

3.3.1   Quick Search

On the main CARDS page, fill in the search criteria and select the magnifying glass icon (Search button).

The search results will look similar to those shown below.

a. The results will indicate the number of matches found and the list of cards matching the search criteria.

b. By default, using the search box will search all text fields for a matching result.

3.3.2 Advanced Search

1. To add more search fields to the page, select **Refine your search**.

2. Fill out the additional fields, as appropriate, and select **Search**.

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3.4 Viewing the Details of a Card

Users must have a valid CARDS account and be logged in to view the details of a card. If the user is not already logged into CARDS, select a card to redirect the user to the login page and follow the steps in Section 3.1, Logging in to CARDS.

1. Select a card to view its details.
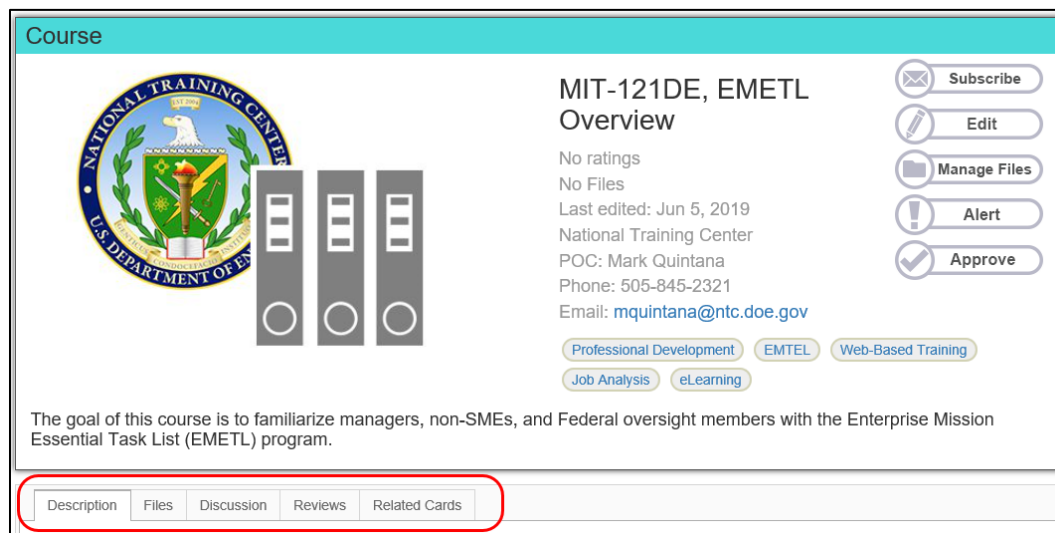
2. To access the different sections of the card, select the tabs at the bottom of the screen (tabs are described in the following sections).

3.5 Downloading Files

Course and other materials can be attached to a card. Users can either download these materials individually or zip and download all attached files together.

The Files tab displays the name, the date uploaded, and the size of each uploaded file. If the file can be previewed, then the **Preview** button will be displayed.

3.5.1 Zipping and Downloading Multiple Files

To zip and download all files attached to the card, select **Download**.

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3.5.2 Downloading Individual Files

1. Select the Files tab.

2. Select **Download** next to the name of the file to be downloaded.
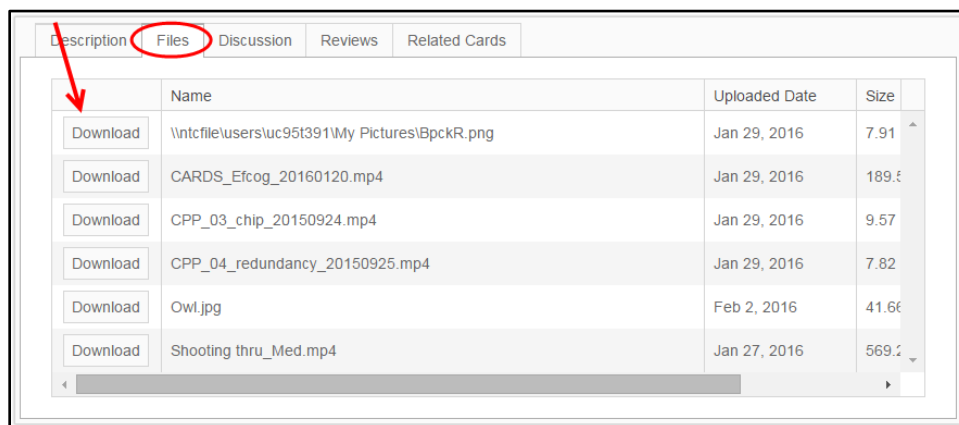
3.6 Using Comment Threads

Comment threads can be created within CARDS to allow for discussion about the card.

1. To view a card's existing comments, select the Discussion tab.
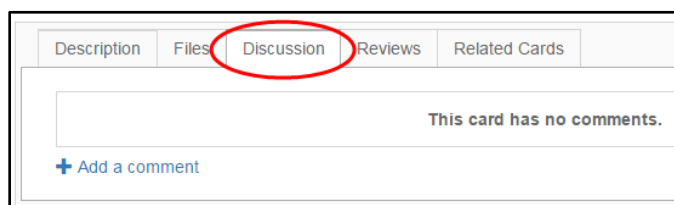
2. To add a new comment, select **Add a comment** at the bottom of the page.

3. To reply to a comment, select **Reply** underneath the comment.

4. To edit a comment, select **Edit** underneath the comment. If the Edit link is not visible, the comment cannot be edited by the user.

5. To delete a comment, select **Delete** underneath the comment. If the Delete link is not visible, the comment cannot be deleted by the user.

6. To report a comment as inappropriate, select **Report This** underneath the comment. A window will appear with options for reporting the comment.

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3.7   Adding a Review to a Card

A card can be reviewed by users other than the card's owner. A user may only submit one review for a specific card, and reviews can be edited after submission.

3.7.1   Creating and Submitting a New Review

1. Select the Reviews tab on the card detail page, and select **Add a review**.

    OR

    Select the **Rate This** link next to the card's star rating. If the **Rate This** link is not visible, the user cannot review the card.

2. Enter a title for the review and adjust the individual rating by selecting the appropriate star for each rating.

3. Enter comments in the **Review Description** section.

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4. To post a review anonymously, select the **Post anonymously** checkbox.

    NOTE: Although anonymous reviews do not include the reviewer's names, designated administrators have the ability to see the names of the users who submit them.

3.7.2 Editing a Review

1. To edit a review, select the **Edit** link underneath the review. If **the Edit** link does not show, the review cannot be edited by the user.

2. To delete a review, select the **Delete** link underneath the review. If the Delete link does not show, the review cannot be deleted by the user.

3. To report a review as inappropriate, select **Report This** underneath the review. A window will appear with options for reporting the review.

3.8 Reporting Inappropriate Content

Cards, comments, and reviews can all be reported for inappropriate content. CARDS Administrators will be notified and will take appropriate action when inappropriate content is reported.

3.8.1 Reporting a Card

To report a card as inappropriate, select **Alert** on the card's detail page. A dialog box will appear with options for reporting the card.
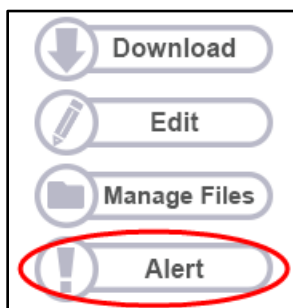
3.8.2 Reporting a Comment
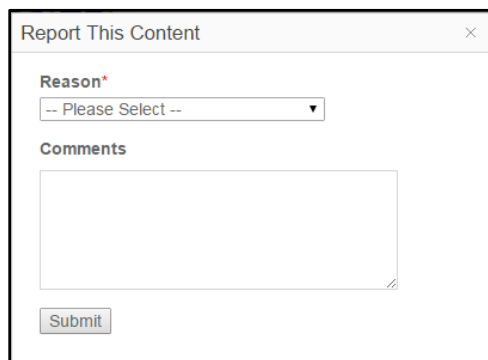
To report a comment as inappropriate, select **Report This** underneath the comment. A dialog box will appear with options for reporting the comment.

3.8.3 Reporting a Review

To report a review as inappropriate, select **Report This** underneath the review. A dialog box will appear with options for reporting the review.

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3.8.4 Reporting Content

1. In the Report This Content dialog box, select an option from the Reason menu that describes why the content is being reported.

2. (Optional) Use the Comments section to explain why the content is inappropriate.

3. Select **Submit** to send a notification to CARDS Administrators to investigate the reported item.

3.9 Viewing Related Cards

Select the Related Cards tab.
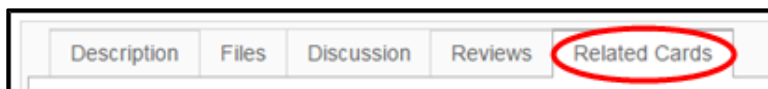
3.9.1 Cards with Similar Tags

The Related Cards tab shows a list of cards that share tags with the current card. The more tags a card has in common with the current card, the higher it appears on the list.
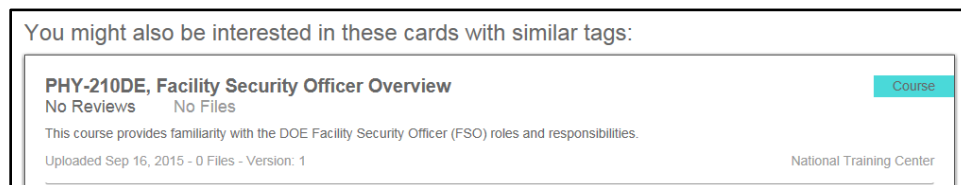
3.9.2 Card Variants

A card that is based on another card can be indicated as being a "variant" of that card. This encourages reuse of training materials across the complex and allows users and CARDS Administrators to see how the CARDS community is making use of and building on uploaded resources.

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If the current card is a variant of another card, then the list will include an entry that names the base card.
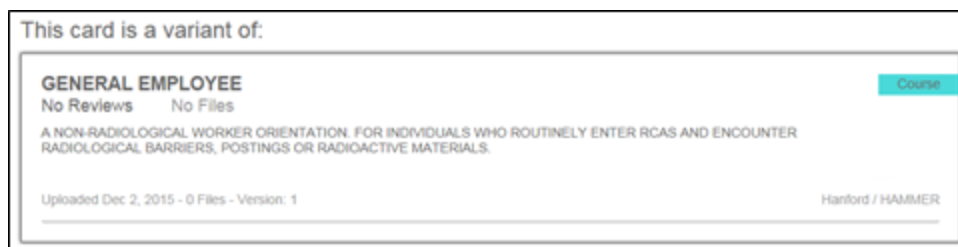
If the current card has been used as the base for other cards, then the list will include one or more entries that name the variants of the card.
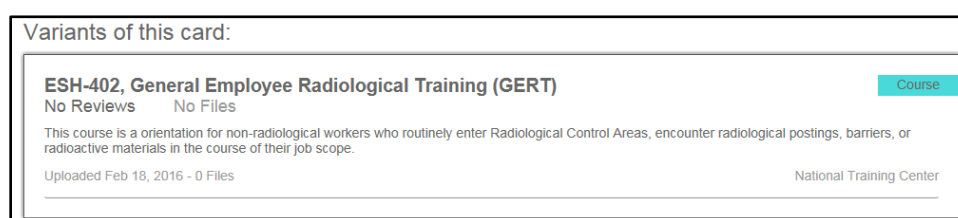
3.10 Managing Subscriptions

To see all content in CARDS on a particular topic or all the content uploaded by a specific organization, subscribe to a tag or an organization.

When a tag the user has subscribed to is applied to a new card, the user will receive an email when new content has been created with that tag.

When new content is uploaded by an organization the user has subscribed to, the user will receive an email when new content has been created by that organization.
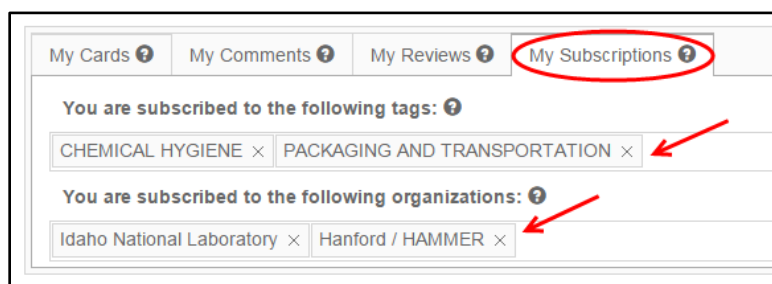
3.10.1 Subscribing/Unsubscribing to a Tag

1. To subscribe to a tag, select the tag from the list on the My Subscriptions tab of the user's dashboard.

2. To unsubscribe to a tag, select the **X** next to the tag name.

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3.10.2   Subscribing/Unsubscribing to an Organization

1. To subscribe to an organization, select the organization name from the list on the My Subscriptions tab of the user's dashboard.

2. To unsubscribe from an organization, select the **X** next to the organization name.

3.11   Creating a New Card

To add content to the CARDS application, users must first create a card to hold the content. After the card has been created, users can upload files to the newly created card at any time. This makes it possible to create cards for several courses at once and then upload the actual content when time permits. See Section 3.13, Uploading and Deleting Files, for more information.

A newly created card will be placed in Inactive mode so it will be visible only on the My Cards tab of the owner's My Dashboard page. After the card has been activated, it will appear on the main CARDS page and will be visible in searches, filters, subscription alerts, and lists of related cards.

If users activate a card before files are uploaded, then other CARDS users can see the card and its details, including information on the Description, Discussion, Reviews, and Related Cards tabs. However, the **Download** button will not appear on the card details page and the Files tab will be empty. See Section 3.12, Activating and Inactivating a Card, for more information.

3.11.1   Entering New Card Details

1. Select **+New Card** to open the new card details page.

2. Complete the fields with information about the new course, image, video, or other content. Required fields are indicated with a note. The Description field is prefilled with an erasable template that provides a useful format for course information.

   a. The template is merely a starting point of suggested information and should be modified by the site as needed.

   b. Information entered in the Description field must not contain any content categorized as Official Use Only (OUO), Unclassified Controlled Nuclear Information (UCNI), Controlled Unclassified Information (CUI), personally identifiable information (PII), proprietary, or confidential.
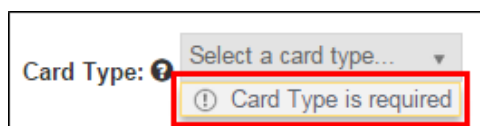
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Description: ❓

| Format ▼ | **B** | *I* | U̲ | ≡ | ≡ | ≡ | ≔ | ⊟ | ⇥ | co | 🖼 | ⊞ |

Suggestions for details to include:

Course ID:

LMS Course Description:

Target Audience:

Course Length:

Retraining Interval:

Delivery Source: In-house or through a vendor?

Test-out Available:

3.11.2 Adding Tags

Tags are keywords that describe the content in a card. The CARDS application uses tags to identify similar and related information in the collection, allowing users to search, browse, and subscribe to content.

CARDS is prepopulated with a list of common tags, and users can easily add new tags if necessary. Tags can be added and changed in the Tags section of the Create/Edit page.

1. To use an existing tag, place cursor in the Select from existing tags field and select the appropriate tag from the list.

2. To add a new tag:

    a. Select **Create a New Tag**.

    b. Type the tag name and select an option from the Tag menu.

    c. Select **Add New**.

3. To remove a tag:

    a. Select the **X** next to the tag name, or

    b. Open the list and select the tag name.

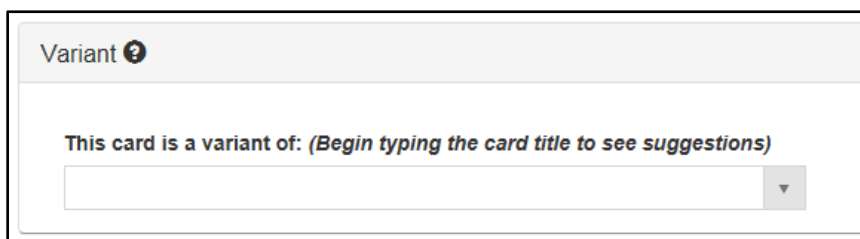| Tags		
Select from existing tags	or	**+**Create a New Tag
Select Tags		

3.11.3 Indicating a Card is a Variant of Another Card

Users may want to download an existing card, change the materials for their site's purposes, and upload the revised content as a new card. The new card should be marked as a *variant* of the base card on the Variant section of the Create/Edit page.

To mark a card as a variant:

1. Begin typing words from the title of the base card in the **This course is a variant of** field.

2. Select the base card from the list of suggestions.
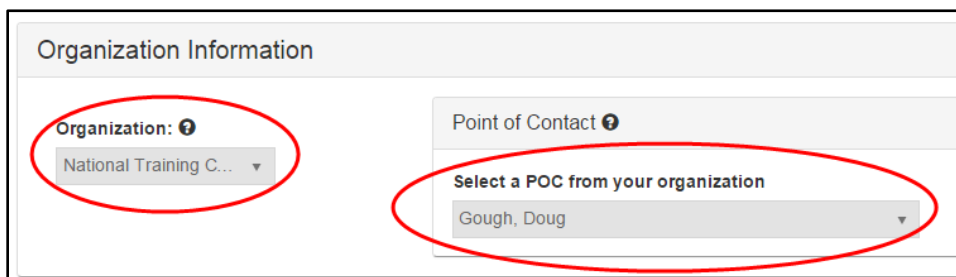

3.11.4 Adding the Point of Contact

The point of contact (POC) is the person in an organization who is responsible for the content of a card but is not necessarily the person who uploaded the card. Other CARDS users should contact the POC to request course files (if unavailable) or if they have questions or comments about the material within the card.

NOTE: It is highly recommended that sites share files by uploading them to CARDS instead of sending via email.

1. If the user belongs to more than one organization, then select the organization that owns the card from the **Organization** dropdown list.

2. Select the POC's name from the list in the Point of Contact section on the Create/Edit page.

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3.11.5   Specifying Availability of Additional Evaluation Materials

It may not be appropriate to post evaluation materials such as exams, test banks, knowledge checks, etc. on a public site like CARDS. To provide evaluation materials directly to individual users on a case-by-case basis, select the **Additional evaluation materials are available on request** checkbox.

3.11.6   Creating the Card

1. Ensure the information in the Description field conforms to the warning message above the **Submit** button.

2. After ensuring all fields have been filled in correctly and all files have been uploaded, select **Submit**.

   NOTE: If CARDS does not redirect the user to the detail page for the card they just submitted, then the user should review the new card details page for error messages, correct any errors, and select **Submit** again.

3. To activate the card, see Section 3.12, Activating and Inactivating a Card.

4. To add content to the card, see Section 3.13, Uploading and Deleting Files.

3.12   Activating and Inactivating a Card

When a new card has been created, it will be placed in Inactive mode. This mode allows an incomplete card to be uploaded and then edited or changed at a later date, but the incomplete card will not be visible to other users and will not appear in search results.

Users can activate a card before or after content has been uploaded. An active card, with or without associated content, will appear on the main CARDS page and in search, filter, subscription alert, and related cards results.

To view the user's active and inactive cards:

1. Select the My Dashboard link under the user's username.
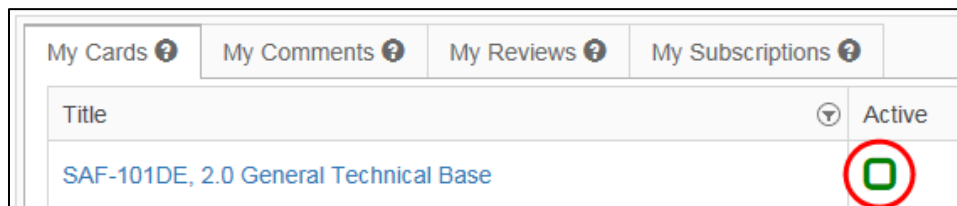
2. Select the My Cards tab.
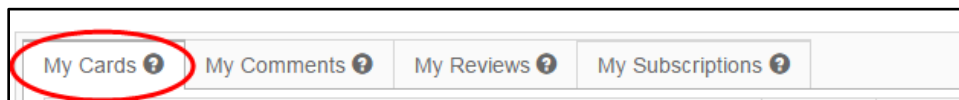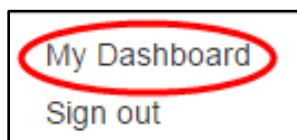
An inactive card will only appear on the My Cards tab on the user's dashboard and cannot be located by any other method.

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3.12.1 Activating an Inactive Card

Inactive cards will appear on the My Cards tab with the **Active** checkbox unchecked. An inactive card will also display the "This card is inactive" banner on the card details page.

1. To activate the card, check the **Active** checkbox.   OR

2. To activate the card from the card details page, select the link in the banner.
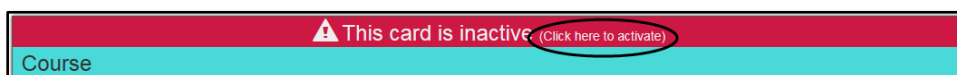
3.12.2 Inactivating a Card

To inactivate a card, uncheck the **Active** checkbox on the My Cards tab.

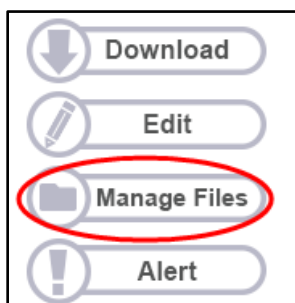**NOTE:** This is the only way to inactivate a card.

3.13 Uploading and Deleting Files

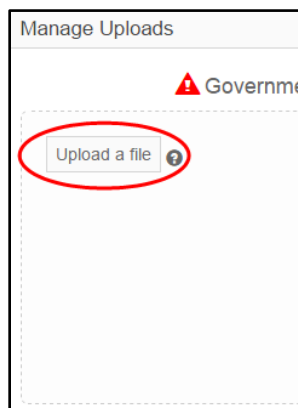After a card has been created, users can upload and delete files on the Manage Uploads page.

NOTE: Content uploaded to CARDS must be government-owned and must not be categorized as OUO, UCNI, CUI, PII, proprietary, or confidential.

3.13.1 Uploading Files

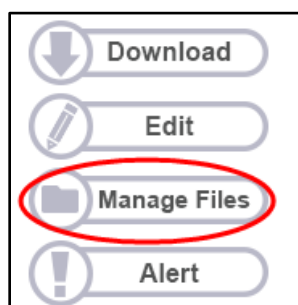1. On the card detail page, select **Manage Files**.

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2. On the Manage Uploads page, select **Upload a file**.

  a. Navigate to the folder where the file to be uploaded is stored.

  b. Select the appropriate file(s), and select **Open**.

3. Users can also drag the files from a desktop or file folder to the Drop files here window on the Manage Uploads page.

  a. Large files may take longer to upload than smaller files.

  b. Newly uploaded files will appear on the Manage Uploads page.

  c. Uploading extremely large files or trying to upload too many files at one time may cause CARDS to timeout during the upload process. If this happens:

    1) Try uploading smaller files or fewer files at one time.

    2) Use the file selection process in Steps 1 and 2 of this section to successfully upload larger files.

3.13.2   Deleting a File

1. On the card detail page, select **Manage Files**.

2. Select **Delete** next to the file to be deleted.

3.14 Editing an Existing Card

A user can edit his or her own cards. When the user has permission to edit the currently viewed card, the Edit link will appear on the card detail page.

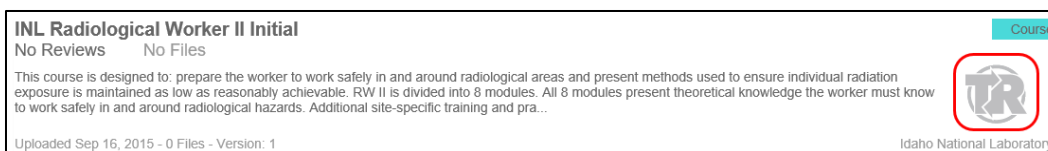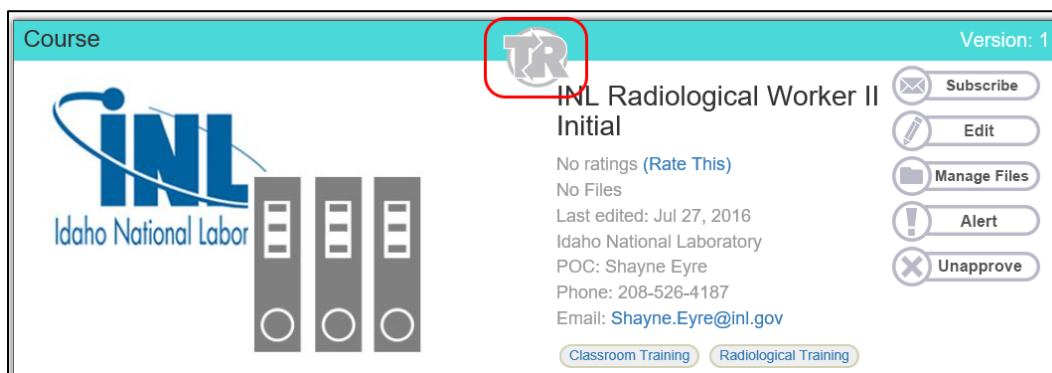To edit a card, select **Edit** to open the card's Create/Edit page.

See Section 3.11, Creating a New Card, for information on using the fields on the Create/Edit page.

See Section 3.13, Uploading and Deleting Files, for information on managing a card's files.

3.15 Reciprocity

Cards for courses that have been approved for the NTC's Reciprocity Program will display the Reciprocity logo on the browsing, search, and card detail screens.

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Only an NTC CARDS Administrator can mark a card for Reciprocity. If a card that was marked for Reciprocity is edited, it may need to be marked again by the Administrator.

NON-PROPRIETARY INFORMATION
This document was prepared by the Programs & Projects Department and is scheduled for review in May 2026.

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