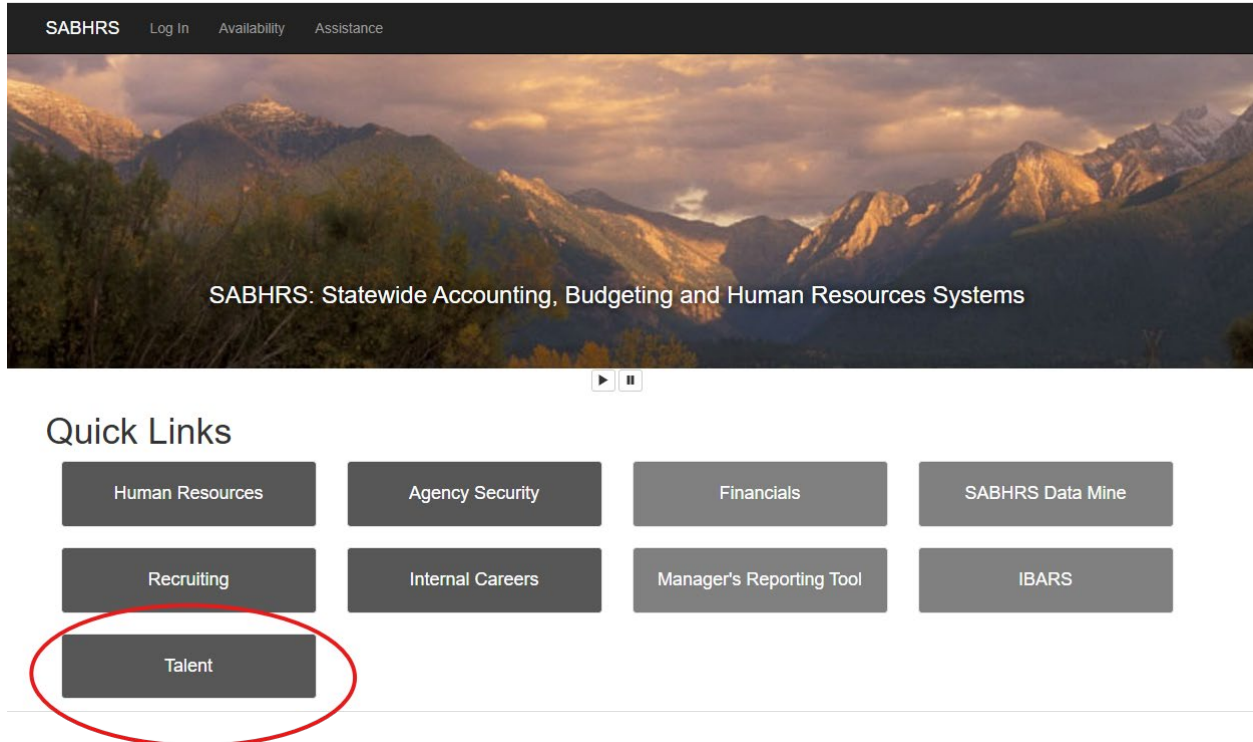


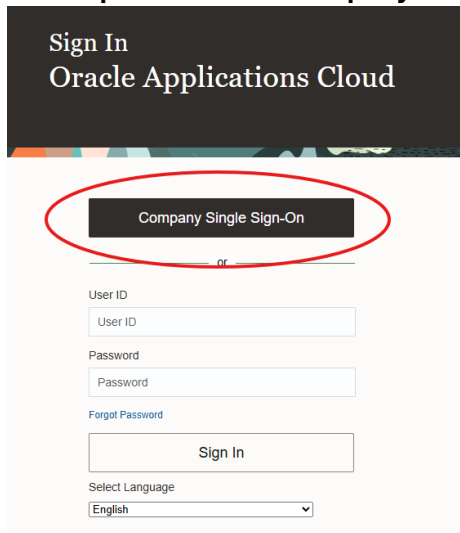
## ATTACHMENT 1 to Policy No. LEG FIN 1\_09\_01 entitled, “Procard Policy”

### Instructions for Managers to assign “State of Montana Procurement Cardholder Training” to employees

1. Go to your login screen in SABHRS. Click on the “Talent” tile.

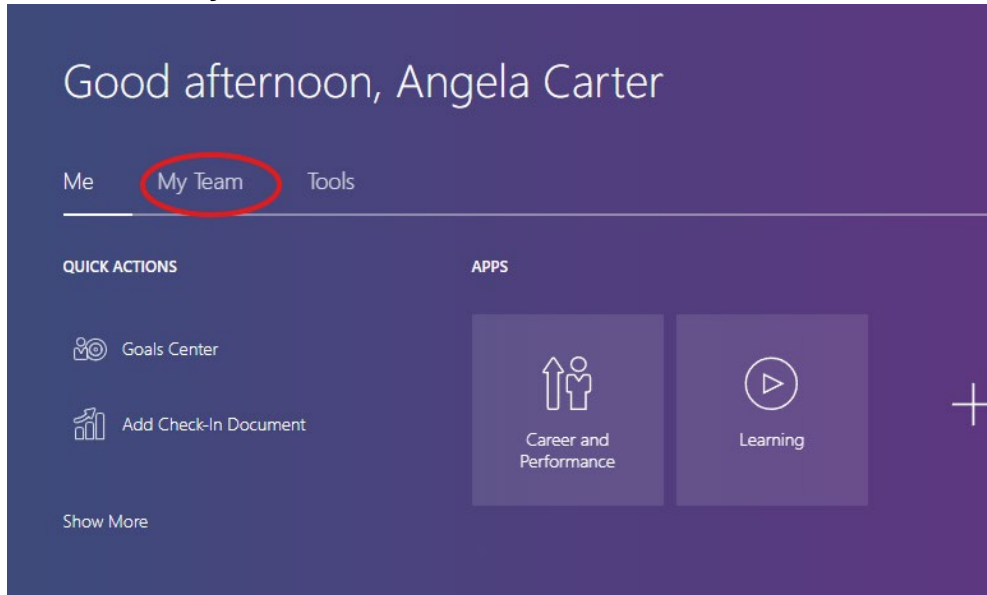


2. Step 2: Click on “Company Single Sign-On.”

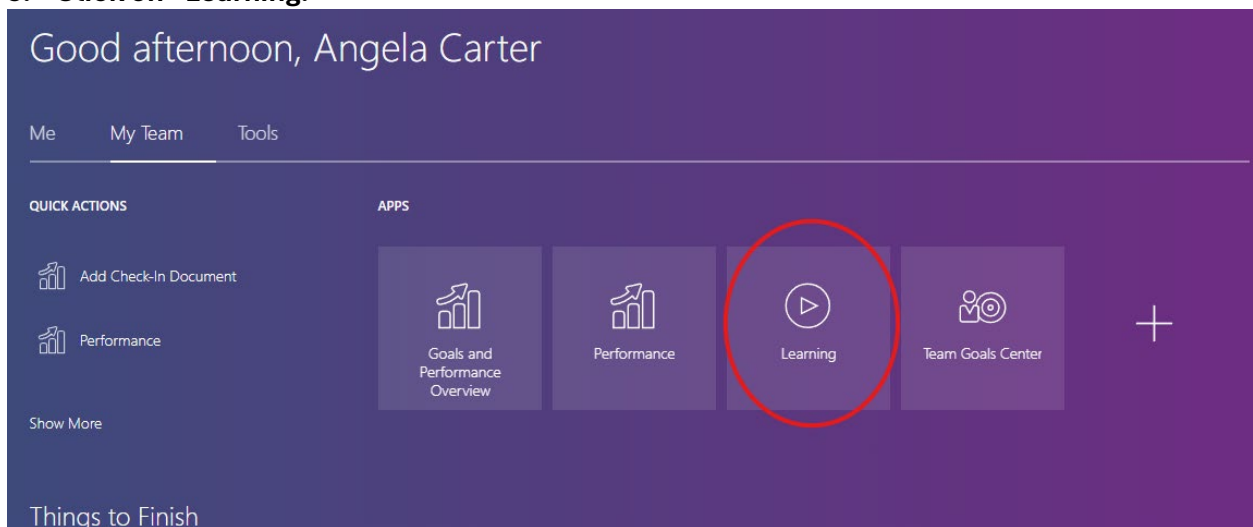


3. Sign in with your C# and your password you use to sign in to SABHRS.

4. Click on “My Team.”



5. Click on “Learning.”



6. Click on the ellipsis and choose, “Assign Learning.”

The screenshot shows the 'Team Learning' interface for 'Angela Carter's Team'. At the top right, there is a 'Switch Team' button and a three-dot menu. The menu is open, showing 'Assign Learning' and 'Record External Learning' options, which are circled in red. Below the menu, there is a search bar and a list of filters: Reports, Direct reports, Enrollments, Current, Enrollment Status, Enrollment Type, Due Date, Business Title, Department, Business Unit, and Filters. The main content area shows a table with 3 items. The first two items are Daniel Messerli and Nickole Davison, both with 'Required' enrollment status and 'Due within 30 days'.

Item	Enrollment Status	Due Date
DM Daniel Messerli EAccounting Budget Specialist	Required 1	Voluntary 1 Due within 30 days
ND Nickole Davison EBudget Analyst	Required 1	Voluntary 0 Due within 30 days
Tamnera Rerkas	Dismissed	Voluntary

7. Fill in required fields.

1. Assignment Type
  - a. Required
2. Start Date
  - a. Today or whenever you want your employee to start
3. Due Date
  - a. Required due date of training
4. Learning Items
  - a. Pick training from the pick list
    - i. For this example, I picked the required due date of 11/14/2025 and the “State of Montana Procurement Cardholder Training.”

The screenshot shows the 'Assign Learning' form. The 'Assignment details' section has three fields circled in red: 'Assignment Type' (Required), 'Start Date' (10/6/25), and 'Due Date' (11/14/25). The 'Learning items' section has two fields circled in red: 'Select a learning item' (State of Montana Procurement Cardholder Training) and 'Offering' (State of Montana Procurement Cardholder Training). The 'Learners' section has two fields: 'Assignee Selection Type' (Person) and 'Person' (Person). A 'Note to Learners' field is at the bottom.

**Assignment details**

Assignment Type: Required

Start Date: 10/6/25

Due Date: 11/14/25

Context Segment

**Learning items**

Select a learning item: State of Montana Procurement Cardholder Training

Offering: State of Montana Procurement Cardholder Training

If you don't select an offering, each learner can make their own selection.

**Learners**

Assignee Selection Type: Person

Person: Person

Note to Learners

## 8. Assign “Learners.”

1. Under “Learners,” pick “Person.”
2. Start typing your direct reports in the adjacent box – if you have approval to assign learning to this person, they will show up
  - a. Pick the person you want to assign training to

**Assign Learning**CancelAssign

**Assignment details**

Assignment Type  
Required

Start Date  
10/6/25

Due Date  
11/14/25

Context Segment

**Learning items**

Select a learning item  
State of Montana Procurement Cardholder Training

Offering  
State of Montana Procurement Cardholder Training

❗ If you don't select an offering, each learner can make their own selection.

**Learners**

Assignee Selection Type  
Person

BERKAS

Tamnera Berkas  
EAccountant

Note to Learners

## 9. Click “Add” to add additional learners.

**Learners**

+ Add

Tamnera Berkas  
EAccountant

Note to Learners

**Justification**

Add as many “Learners” as required.

**Learners**

Add

Tamnera Berkas  
EAccountant

×

Daniel Messerli  
EAccounting Budget Specialist

×

Maia Zelenak  
ESenior Accountant

×

Nickole Davison  
EBudget Analyst

×

Tiffany Cox  
EPurchasing Specialist

×

Note to Learners

10. You may add your own text to “Note to Learners,” or a “Justification.”

11. Once all your fields are filled and your “Learners” are assigned, click “Assign.”

Assign Learning

CancelAssign

11/14/25

Context Segment

**Learning items**

Select a learning item  
State of Montana Procurement Cardholder Training

Offering  
State of Montana Procurement Cardholder Training

If you don't select an offering, each learner can make their own selection.

**Learners**

Add

Tamnera Berkas  
EAccountant

×

Daniel Messerli  
EAccounting Budget Specialist

×

Maia Zelenak  
ESenior Accountant

×

Nickole Davison  
EBudget Analyst

×

Tiffany Cox  
EPurchasing Specialist

×

Note to Learners

**CONCLUSION:** Your “Team Learning” dashboard allows you to look at assignments, status of training, and due dates. For example, below is a small snippet of all the training I’ve required in Financial Office:

**Team Learning**  
Angela Carter's Team

Search by learning items

Reports Direct reports Enrollments Enrollment Status Enrollment Type Completed Date Learning Item Type Department Business Unit Filters Clear (1)

32 items Sort By Overdue, Most to Least Recent Learners Learning Items

State of Montana Procurement Cardholder Training	Learners 6	Due within 30 days
Communicating with Empathy	Learners 1	Due within 30 days
2018 Statewide Cyber Security Awareness Course Expected effort is 0.9 - 1h	Learners 6	
ADITSD HIPAA - Privacy Rules for Business Associates Course	Learners 1	
ADSHR Ethics Training Course	Learners 2	
ADHR 2019 Harassment and Discrimination Prevention Training Manager	Learners 2	
ADHR 2019 Harassment and Discrimination Prevention Training Employee	Learners 9	
ADITSD 2019-2020 Statewide Cyber Security Awareness Training Expected effort is 1.1 - 1.1h	Learners 6	

If I want to find out details of the “State of Montana Procurement Cardholder Training,” I click on that training. You can see that only one hasn’t taken the training. I want to send an email to remind them to take the training. Click the “Share” button, and it will bring up a new email to the person and includes the subject. You will have to compose the body of the email.

**State of Montana Procurement Cardholder Training**

Search by learners

Reports Direct reports Enrollments Enrollment Status Enrollment Type Completed Date Learning Item Type Department Business Unit Filters Clear (1)

6 items Sort By Due Date, Oldest to Newest

State of Montana Procurement Cardholder Training	Completed 6/13/24	Enrollment Status Completed	
State of Montana Procurement Cardholder Training	Completed 12/1/22	Enrollment Status Completed	
State of Montana Procurement Cardholder Training	Due Date 10/31/25	Enrollment Status Not Started	Due within 30 days
State of Montana Procurement Cardholder Training	Completed 4/10/23	Enrollment Status Completed	
State of Montana Procurement Cardholder Training	Completed 9/9/25	Enrollment Status Completed	
State of Montana Procurement Cardholder Training	Completed 1/4/21	Enrollment Status Completed	

File
Message
Insert
Options
Format Text
Review
Help
Acrobat
Tell me what you want to do

Paste

Clipboard

Cut

Copy

Format Painter

Aptos (Body)

11

A<sup>^</sup>

A<sub>v</sub>

☰

☷

A

B

I

U

☰

☷

☷

☷

☷

Address Book

Check Names

Attach File

Link

Signature

Send

To

Cc

Bcc

Carter, Angie

Subject

Your State of Montana Procurement Cardholder Training enrollment

1

2

3

4

5

6

7

Hi-Angie,

I see you haven't completed your required training that I assigned.

Please log into Talent and take your training. You have 31 days remaining.

Thanks,

Angie Carter

Montana Legislative Branch

Financial Director

406.444.4380