SATERN

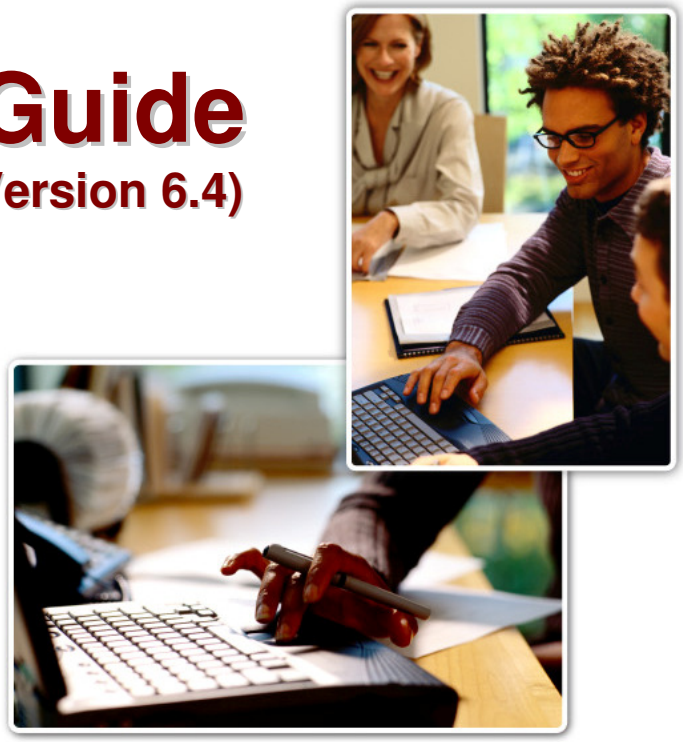
System for Administration, Training, and Educational Resources for NASA

National Aeronautics and Space Administration

Introduction to SATERN Administration

Classroom Guide

(Version 6.4)



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For SATERN v 6.4

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From the NASA SATERN Program Office:

All SATERN administrator training materials must be used alongside the SATERN Rules and Process Guide for administrators. The Guide identifies areas where SATERN functionality cannot enforce the Agency-defined usage of the system at NASA and provide guidance to enable administrator compliance with Agency-defined methods and procedures.

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Course Introduction

Through discussion, demonstration, and hands-on computer lab work, this course teaches the concepts and terminology associated with SATERN. You will be introduced to searching and navigation features, the Learning Needs Management model, as well as how to work with learner records using the step-by-step, hands-on lab exercises. Additionally, you will gain basic skills on how to use SATERN reporting features to create, run and save reoccurring reports.

COURSE OBJECTIVES

Upon completion of this course, you will be able to:

- Identify features of SATERN
- Navigate and use the search functions
- Define specific terminologies associated with the Learning Needs Management model
- View Learner records
- Create, run and save reoccurring reports (optional)

TARGET AUDIENCE

All SATERN Administrators.

ASSUMPTIONS

Here are several tips to consider as you go through the labs and activities in this course book.

Browser Pop-up Window

Do not block pop-up windows in your browser. Please unblock pop-up windows so that the application may function as designed.

When you first log in to SATERN, the following message banner may display at the top of your browser window:

Pop-up blocked

If this banner displays, perform the following steps:

1. Click the pop-up blocked message.

A box displays with a few options.

2. Select the **Always allow pop-ups** from this site option.
3. Click **Yes**.
4. Once the setting is selected, you will not see the pop-up blocked warning again.

Administrator Role and Workflows

This training assumes that your SATERN administrator role is associated with all available workflows in the system. If your role does not include certain workflows, those tabs and pages will be grayed out and/or inaccessible.

Required Fields

Your system administrator configured specific fields throughout the system as *required* based on your organization's business rules and processes. These required fields are indicated with a red asterisk (*).

You must input data in these fields before you are allowed to progress.

If you are using SATERN for training, the fields displayed and marked as required may not reflect the settings you will encounter when accessing your organization's system. Your system administrator can provide you with a list of the required fields for your organization.

USING THIS GUIDE

This classroom guide is designed to be used in conjunction with an instructor. The guide provides general information that will be elaborated upon by the instructor. For additional information, refer to the online help.

Throughout the guide, you will encounter icons that call out various types of information. The following table illustrates how this guide uses icons to indicate different types of comments, activities, labs, etc. that support the text.

Icon	Definition
	Activity: Indicates an activity for you to complete that helps reinforce the information you just learned.
	Note or **Tip:** Indicates additional information that is related to the information presented. It also provides helpful hints and tips or other guidance that further explains the information it accompanies.
	Lab: Indicates a hands-on computer lab. Follow the step-by-step process outlined to perform specific tasks in the system.
	Warning: Warns against particular actions, or that a particular condition might indicate a problem.

ADDITIONAL RESOURCES

There are a number of additional resources that can provide you more information about SATERN. These resources include:

- Online SATERN system help
- Task-specific job aids

Lesson 1: Access, Navigation, and Searching: General Guidelines

The goal of this lesson is to provide you with the general guidelines for accessing, navigating, and searching within SATERN Learning.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Identify administrators (admin) and Learners in SATERN Learning
- Navigate within SATERN Learning as an admin
- Use the keyword/quick command Search function
- Work with and organize bookmarks and recents
- Create search filters and search for records
- Download and view or save search results

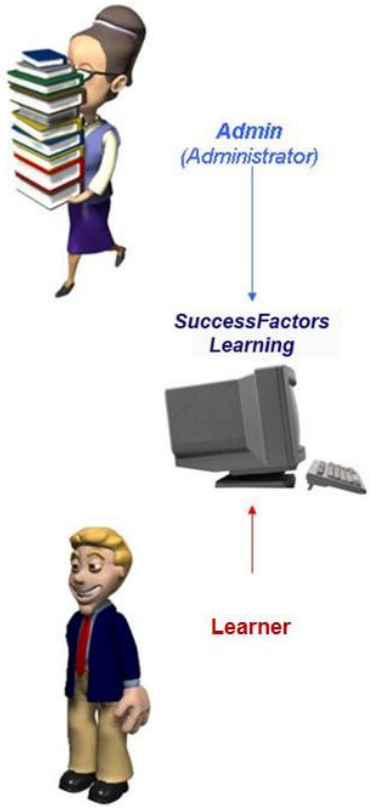
SATERN LEARNING

SATERN Learning is designed to facilitate tracking of the comprehensive range of information organizations need to manage learning programs effectively. SATERN Learning enables its administrators to make informed decisions about their Learner population, learning assignments, learning completions, scheduling, and resources.

Figure 1: SATERN Learning

ACCESSING SATERN LEARNING

The learner and administrator applications are fully integrated into one common interface. The main menu is now role based: learner, supervisor, organization owner, and/or admin. Individuals can easily identify what roles they serve and how to access the information for each role.



An admin is an administrator for SATERN Learning. An admin can have many different types of responsibilities including adding or editing Learners, scheduling training, enrolling learners into training events, giving Learners credit for completing training or running reports.

A learner is considered the end user of SATERN Learning. Learners include supervisors and organization owners. Learners log in to the application where they can register for training sessions, launch online training, manage their Learning Plan, and supervise other learners who report to them.

PERSONALIZE YOUR ADMIN EXPERIENCE - CONFIGURABLE HOMEPAGE

In the continuing effort to provide an application that meets each administrator's unique needs, the administrator Home page is configurable, including a new page layout option. Quick Links (Figure 2) are now available from the Home page, along with a configurable Welcome area that can contain any information that needs to be imparted to administrators.

Page Layout

Admins can configure the layout for their home page using the **Choose a different layout** icon ( ) in the upper right to rearrange the two areas, Welcome and Quick Links (Figure 2).

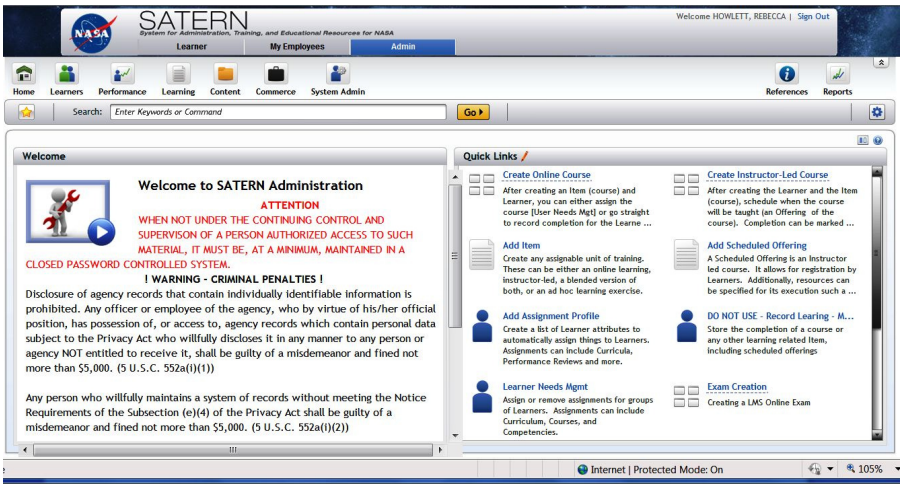


Figure 2: Admin Homepage

SATERN Learning provides admins with six different layout configuration options. Additionally, the slide bar between the two areas can be moved to adjust the size of each area.

Quick Links from Home Page

Quick Links were traditionally predefined based on commonly used functions within the system; however, now any command available from the Search textbox can be configured to display in the Quick Link area, giving you access to whatever you do most.

Using the Manage Quick Links feature (**Home Page > Quick Links > edit icon** ( )), admins can select from a list of Available commands and add them to the list of Selected commands (Figure 3).

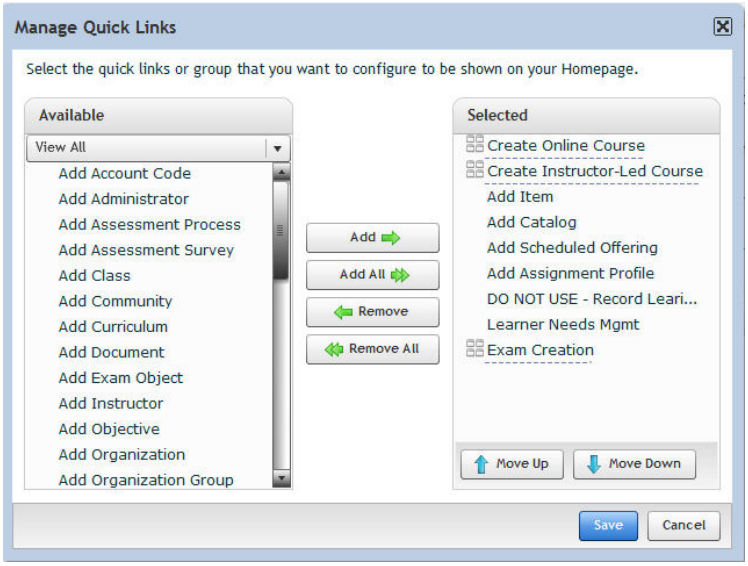


Figure 3: Managing Quick Links

The Quick Links can be defined on a global level and then personalized by every admin, always following any assigned security permissions. The definition for each selected command is label driven.

GUIDED MODE

Typically, the purpose of using the guided mode is to provide less experienced administrators with a guided process for completing routine, multi-step actions. The admin can click the **Guide Me** icon ( ) on any group process and access that process from anywhere within the application (Figure 4). This allows the process to follow the admin and the icon will only display once a guided mode has been initiated.

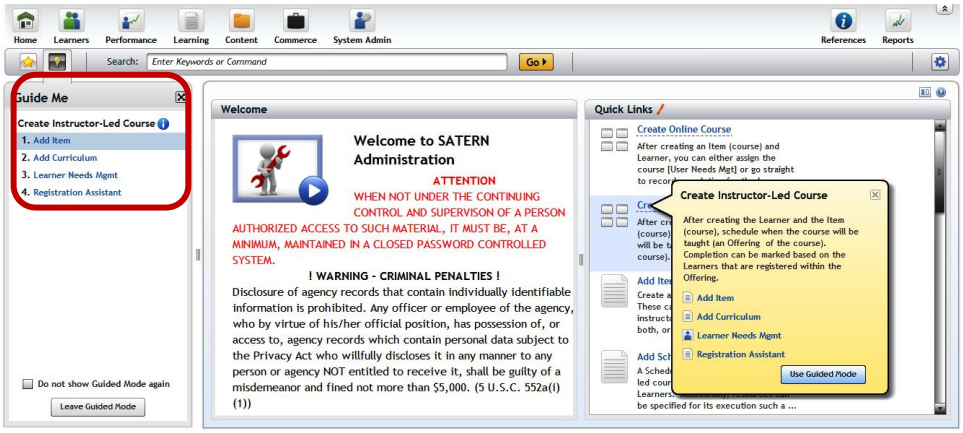


Figure 4: Example of Guide Me Mode

ADMIN SCREEN LAYOUT

There are four main sections of the admin screen (Figure 5):

1. Top menu frame
2. Left menu frame
3. Content frame
4. Bookmarks and Recents Panel

Figure 5: Admin Screen Layout

Top Menu Frame

The top menu frame (main menu) contains tabs and buttons to the main functional areas in SATERN Learning (Figure 6).

Figure 6: Top Menu Frame

Select a tab to access the respective SATERN Learning interface and take specific Learner actions. Select:

- Home to toggle to and access your learner account (interface)
- My Employees to toggle to your supervisor interface and manage your subordinates. This text is only displayed if you have subordinates.
- Organization to toggle to your organization owner interface and explore data (such as view item completions, learning projections, curriculum status, and registration status for a respective organization)
- Admin to toggle to and access your administrator account (interface)

This guide focuses specifically on the administrator interface. When the Admin tab is selected, you can click any button in the button bar to access and take action in the respective functional area.

Note: Your tabs and functional area buttons may differ depending on the workflows and roles you are associated with.

When a button is selected, its respective available options are displayed in the left menu frame. In Figure 7, for example, to access an item you must navigate to **Admin > Learning > Items**.

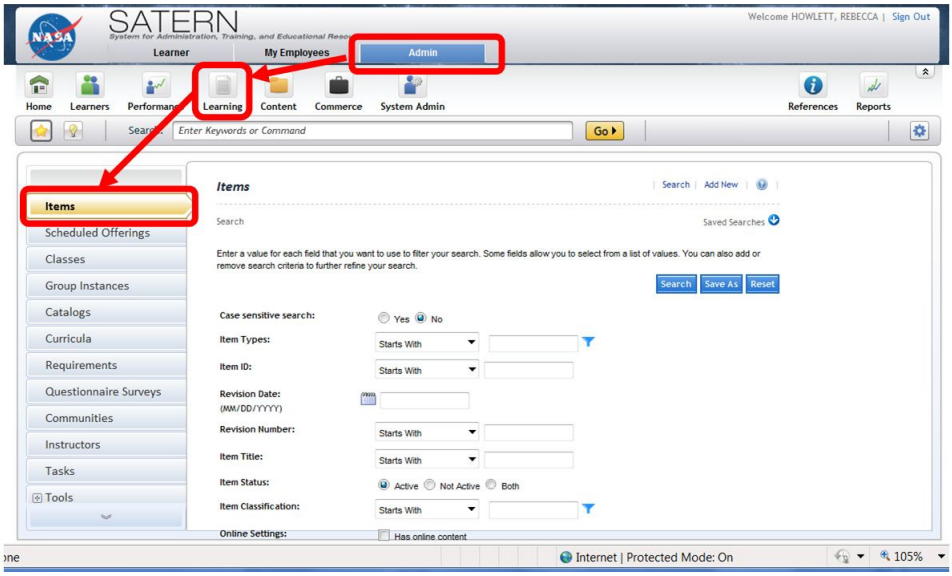


Figure 7: Admin Menus

Also in this top frame, admins can access references and reports (Figure 8):

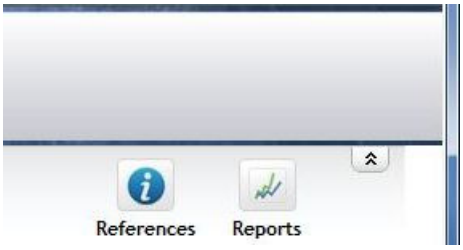


Figure 8: References and Reports

- The **References** button is used to manage the referenced fields that used throughout SATERN Learning, including calendars and time, geography, and physical resources (Figure 9). This overlay menu is conveniently accessed from any screen in the application without having to navigate to a separate screen.

Figure 9: Adding a New Assignment Type Reference within an Item

- The **Reports** button is used to manage reports, including:
  - Searching for and running reports.
  - Changing the description of reports.
  - Importing and exporting reports and libraries for customization in Report Designer.
  - Publishing and unpublishing reports.

Note: The actions that you can take in the reports section are controlled by report workflows. See "Appendix A: Running, Saving, and Creating Recurring Reports" for more information reports.

- The **Collapse** ( ) /**Expand** ( ) Main Navigation buttons to collapse or expand the button bar (Figure 10).

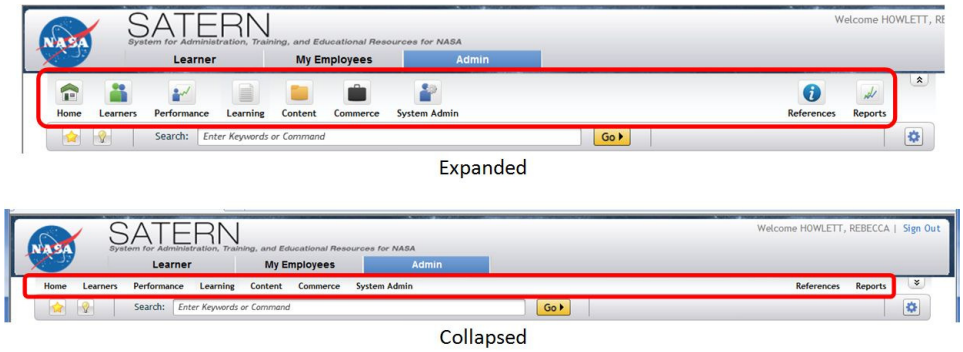


Figure 10: Button Bar Exapnded and Collapsed

- The **Preferences** ( ) icon to change your locale (language, date/time format, etc.) and time zone settings.
- The **Sign Out** link to end the current session.

Keyword and Quick Command System Search

Use the **Search** textbox (Figure 11) to perform a keyword or quick command search. Use the keyword search to locate a record based on the text that appears in one of the common fields for that record (for example, the title or description fields of items, curriculum, scheduled offerings, etc.).

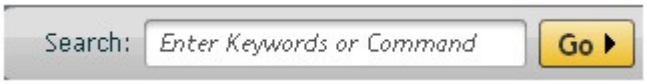


Figure 11: Keyword/Command Search Textbox

Use the quick command search to also perform a common action by typing the action verb (for example, "Add") followed by the record that you want to act on (for example, "item"). You can also start typing the name of a tool (for example, "Registration Assistant"). As you start typing, they system displays the commands that are available to you (type-ahead search) (Figure 12).

Figure 12: Search Textbox: Quick Command Search

When you see the action that you want to take or the tool that you want to use, click that item in the list to access the command or tool. Or finish entering your keyword/command and click **Go**.

Note: While the system restricts your type-ahead results based on your workflows, it does not perform a case-sensitive search; therefore, if you type "Tes", then the system shows "Required Dates Editor" (if you have permissions for that workflow) because the second word of that tool contains and ends with "tes".

Left Menu Frame

A related set of menu options display in the left menu frame, based on the button clicked in Top Menu Frame. If a menu item has subsections within it, a plus ( ) is displayed (Figure 13).

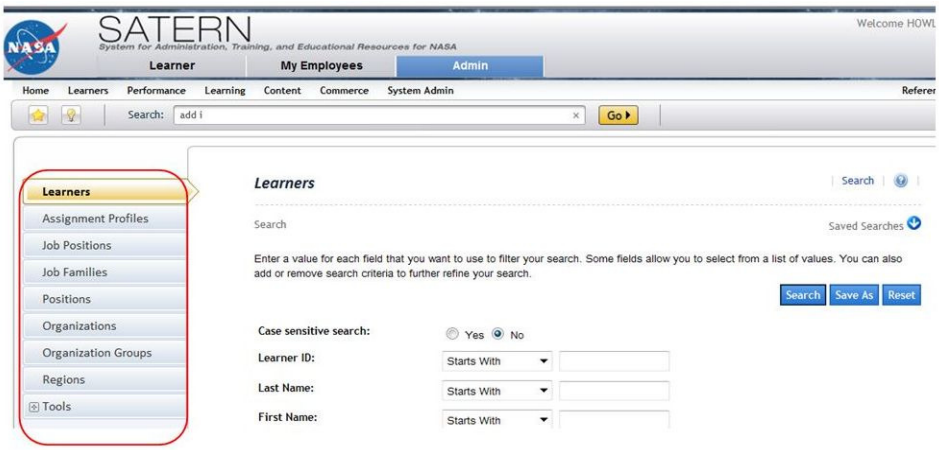


Figure 13: Left Menu Frame

Click the up and down arrows in the left menu to see additional left menu options (Figure 14).

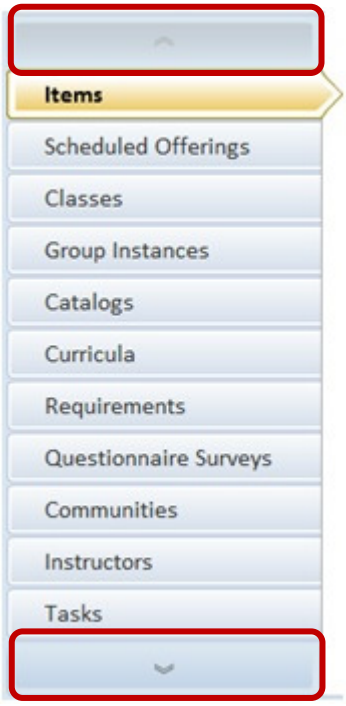


Figure 14: Left Menu Up and Down Arrows

Click to expand a menu option. The changes to and the expanded menu options are displayed (Figure 15). Only one menu item can be expanded at a time.

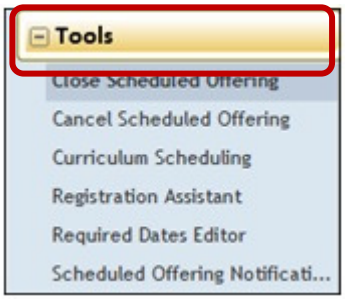


Figure 15: Expanded Left Menu Option

Content Frame

When a left menu option is selected, the corresponding screen displays in the content fame. This is the working area where searches are conducted to retrieve, view and edit records.

There are two features on every page in the content frame:

-

  1. **Breadcrumbs** display at the top-left corner of the content frame and identify the area, section, subsection (if applicable), tab, and mode currently open. Breadcrumbs may contain active links that facilitate navigation to previous screens.

-

  2. The **Help** icon displays at the top-right corner of each content frame. Clicking this icon displays context-sensitive help for the specific section currently open, and opens the online help with access to contents, index, search, and the system glossary.

LAYOUT OF SOME LEARNING RECORDS

The screen layout of some learning records contains three main areas (Figure 16):

- **Core** (red outline at the top left)
- **Related** (yellow outline at the bottom half)
- **Actions** (green outline at the top right)

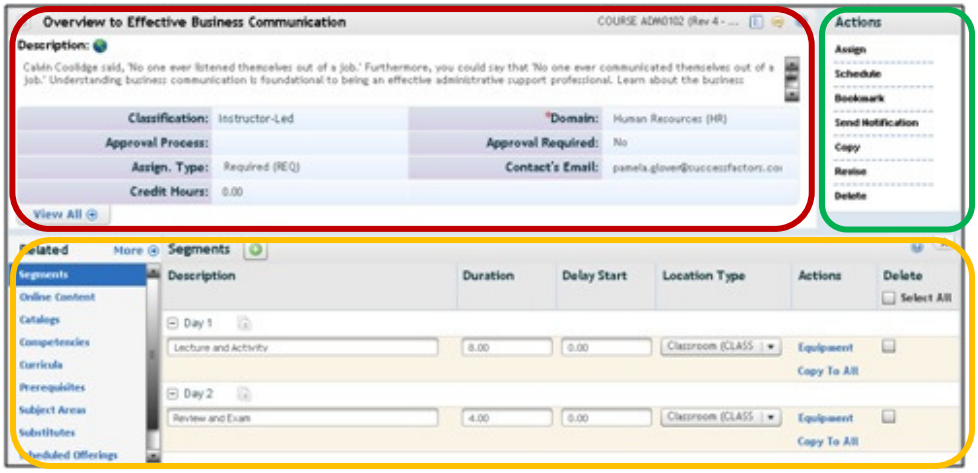


Figure 16: Item Record

The core area contains summary information about the record. Click the **View All** link to display the **Additional Settings** page of the entity record. To edit any field in this area or **Additional Settings** page, click in a displayed field and enter text or select a reference value (depending on the field type).

The **Related** area contains additional information regarding the entity record.

The **Actions** area includes links for you to take additional actions on the record.

BOOKMARKS AND RECENTLY ACCESSED RECORDS

Because the Bookmarks and Recents panel share the same space, you can switch between the two by clicking the **Bookmarks** link or the **Recents** link. When you need more screen space to view the record that you're working with, the system also allows you to hide the Bookmarks and Recents panel by clicking the Bookmarks button ( ) or clicking the **Close** icon ( ). Click the **Bookmarks** button again if you wish to restore the panel (Figure 17).

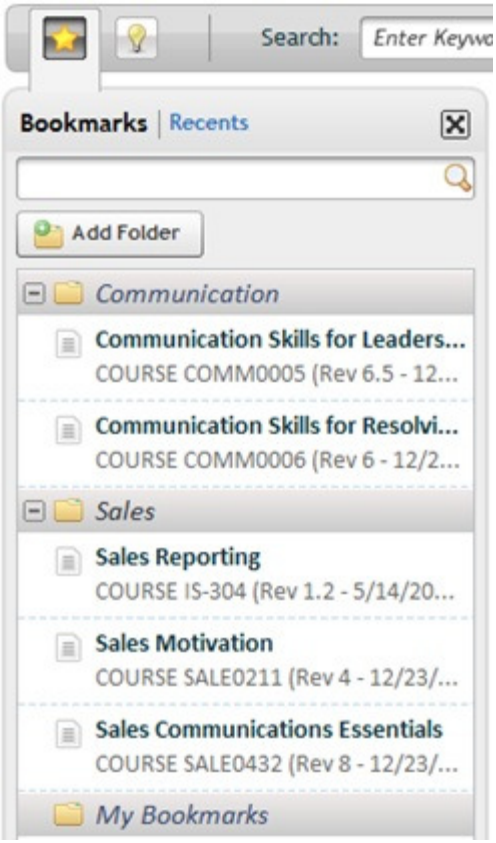


Figure 17: Bookmarks and Recents Panel

Bookmarks

The purpose of the Bookmarks area (Figure 18) in SATERN Learning is to provide you with a method for organizing the database records and system entities that you need to access or modify most frequently. This allows you to skip the step of repeatedly searching for commonly accessed records.

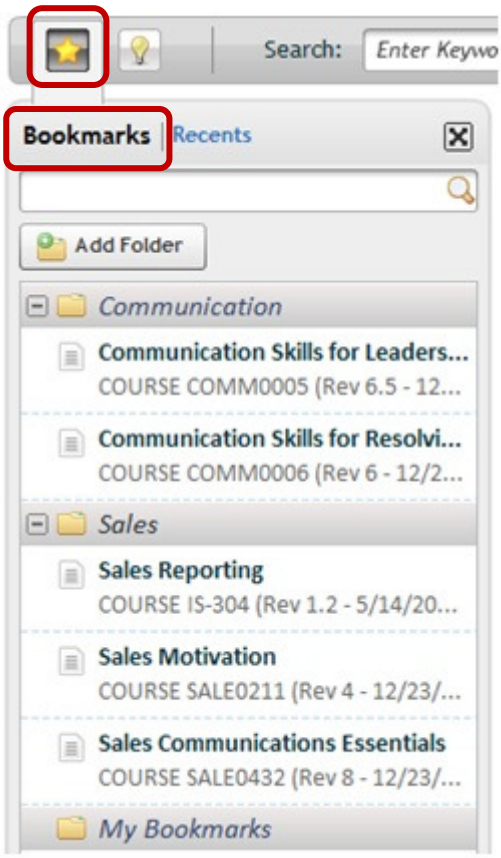


Figure 18: Bookmarks

Bookmarks are accessible from any screen within the application. Entities can be bookmarked based on personal preference. Figure 19 displays the entities that may be bookmarked by Administrators in SATERN Learning:

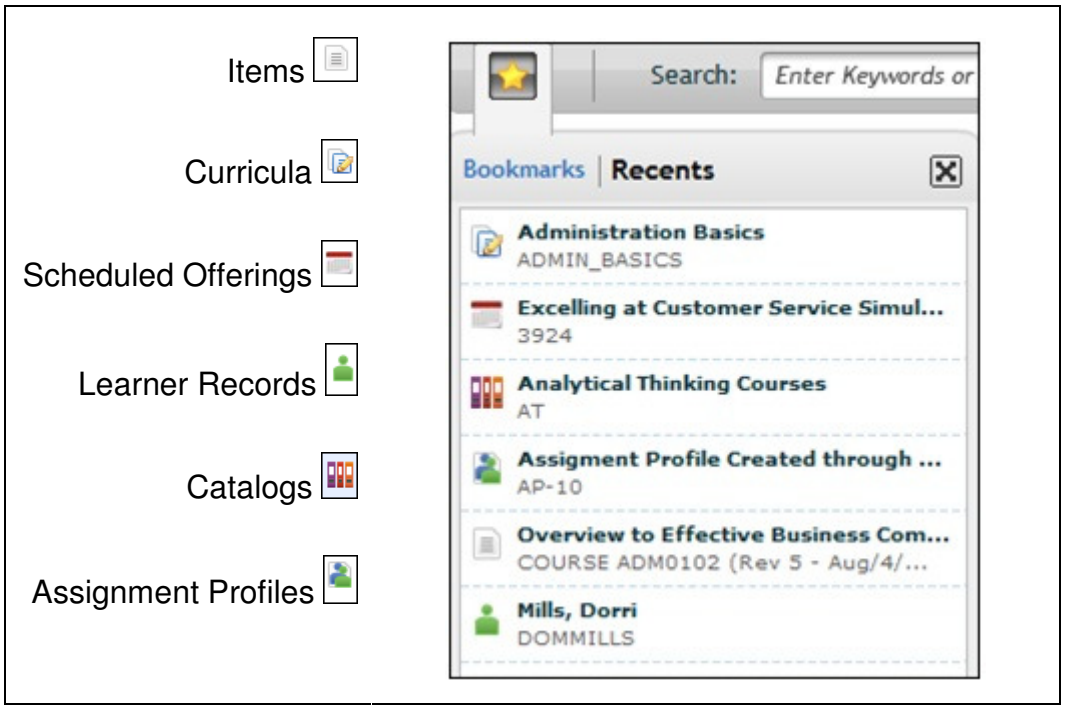


Figure 19: Bookmarks

Use the **Search Bookmarks** textbox to perform a “type ahead” filter on your current view. That is, when you start typing in this box, and you have one or more bookmarks that contain the text that you typed, then the system displays only those entities. The type-ahead filter is not case sensitive, and can be used to quickly locate the bookmarked records that you need.

Click a bookmark record to see its respective details page in the content frame (Figure 20). The purpose of bookmarks is to provide you with quick access to the 1) details of the record, 2) common actions you might take on the record, and 3) other records that are associated with the current record.

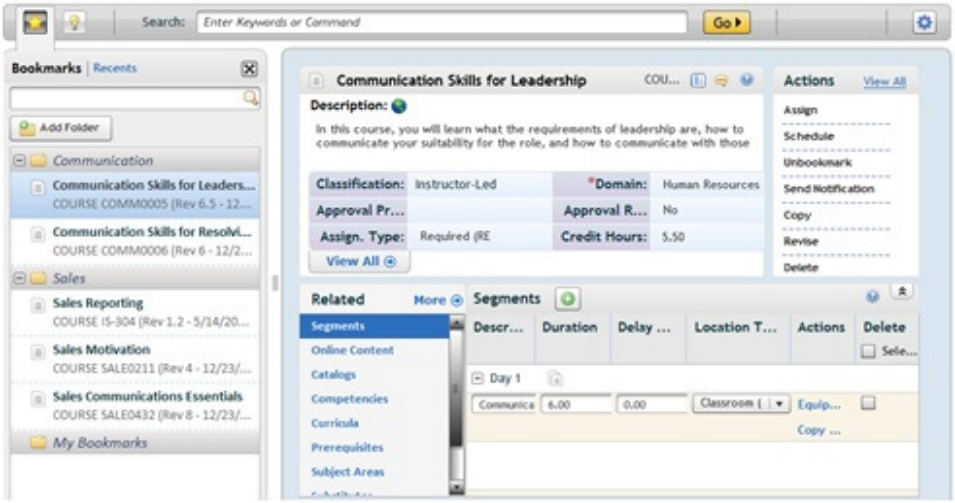


Figure 20: Details Page

The details page displays pertinent information for the selected record. The pages of bookmarked entities can be configured at **System Admin > Configuration > Record Configuration**. More information will be provided in the “System Administration” section on how to set record configurations.

If you hover your cursor over a bookmarked record, you can perform the available actions in the hover menu without loading the details page for that bookmarked record (Figure 21).

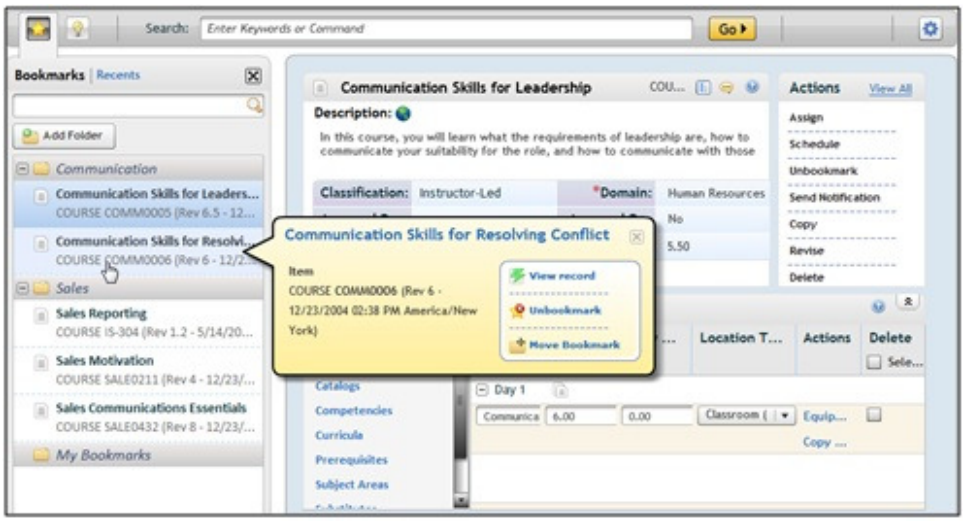


Figure 21: Record Hover Menu

Organizing Bookmarks

Click **Add Folder** to add a new folder at the top of the existing list of folders. After you add a folder, you can rename it by hovering over the folder and clicking **Rename Folder** or even **Delete Folder** if needed (Figure 22). You can only delete an empty folder (i.e., if it contains no bookmarked records).

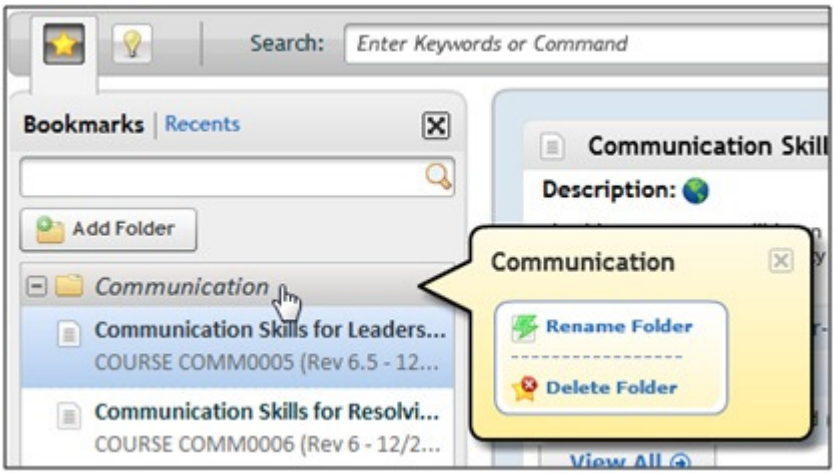


Figure 22: Rename/Delete Folder Options

Bookmarked records are stored in folders of your choosing, so you can structure and access the data in a way that makes sense to you. Upon first login, there is one default folder named *My Bookmarks*. You can create new folders as needed, and move bookmarks between folders.

You can reorganize the folder list by dragging and dropping bookmarked records or entire folders (including their contents) to a different position in the list. However, you cannot move a folder so that it becomes a subfolder. Therefore, to create something like a subfolder, we recommend you develop a naming scheme (for example, *Curricula_Online Training or Curricula_Instructor-Led Training*) to simulate a subfolder structure.

All folders that you create are private and cannot be shared; therefore, all records that you bookmark are your bookmarks and cannot be shared amongst other administrators. If another administrator changes your workflow permissions (i.e., edit or view privileges) for a certain record type, then some of your bookmarked records could disappear from your folders. However, if the administrator restores your workflow permissions, then the system returns your previously bookmarked records.

Recently Accessed Records

The Recents panel shows the records that you have accessed most recently at the top of the list (Figure 23). Finding records that were recently accessed allows administrators to return to previously viewed records much faster. Recently accessed records are available from anywhere and the feature tracks enough data so the Learner's activity in recent sessions is just a click or two away.

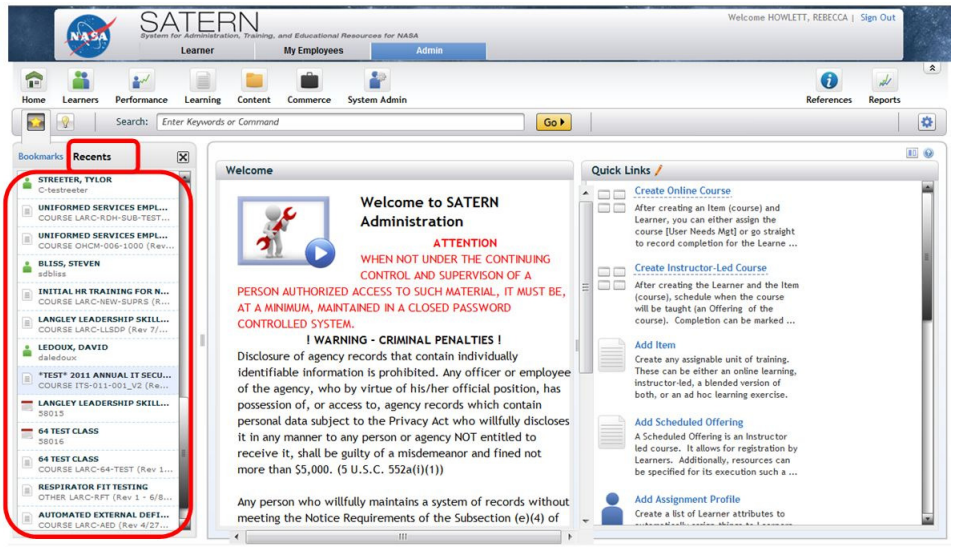


Figure 23: Recently Accessed Bookmarks

The system places a record that you accessed at the top of the list when you:

- Add a new record
- View or edit a record from a search result
- Access a record from your bookmarks
- Access a record from the Recents panel

For example, if you directly assign an item to the Learner record (**Learner > Learner > Learning Plan**), then the system adds the learner record (because you're editing that record) and the item record (because you are associating it with the learner record).

***Note**: The system only adds records to the Recents panel if you can select that record type from the Select a record to configure list (System Admin > Configuration > Record Configuration). The system does not add any configuration settings or records that are in system admin, reports, or references to the Recents panel.*

NAVIGATING IN SATERN LEARNING

Table 1 provides a list of universal controls found throughout SATERN Learning.

Table 1: Commonly Used Navigation Icons

Icon	Description
| Search | Add New |	The Search link opens a search page (more on how to use the search pages in the next section). The Add New link can always be found in the top right corner of the content frame. This link allows the admin to create new records.
More	Some records may have more sections than what can be displayed on the details page. For these records select the More link to access the additional tabs.
Apply Changes	Click **Apply Changes** to save new or edited information in an existing.
Save	Click **Save** after editing information on an existing database record. This button only appears when a record has information added, removed or modified. For some records this button will appear instead of the Apply Changes.

Cancel	Select the **Cancel** button to cancel your unsaved changes.
	The Plus button allows you to associate another record with the entity. For example, within the Catalogs section of an item, click the Plus button to add Catalogs to the Item.
View All	The **View All** link is located at the bottom left of the core area for some records. Click this link to view the Additional Settings page for the record (displays additional details about the record).
Add	Click **Add** to save a new record into the database once an admin has completed all necessary fields.
Copy...	Once an admin has accessed a record in edit mode, the admin can click **Copy** to copy the existing record to a new unique ID.
Delete	Once an admin has accessed a record in edit mode, the admin can click **Delete** to remove the record from SATERN Learning.
add one or more from	The add one or more from list link opens a search window; one or more search criteria can be entered to locate and retrieve the desired information.
Records per Page 10 User ID MShah Shashi 5 10 25 50	The **Records per Page** drop-down menu allows admins to set the number of search result records displayed on the screen at one time. This setting holds until the admin logs out of the session. This setting reverts to the system default upon next login.
Select All / Deselect All Page 99 of 121. Go	An admin can navigate through search results using the Page feature. They can scroll through the search results page-by-page or jump to a specific results page. On a search results page, an admin can use the Select All / Deselect All links to select all, or deselect all, results.
	The **View** icon accesses a record as read-only.
	The **Edit** icon accesses a record and allows an admin to make updates.
	The **Star** icon represents that the entity can be bookmarked. Administrators can click the star to add the record to their own personal bookmarks from the search results or can add it to their bookmarks from within the record.
COURSE ADM0102 (Rev 5 - 8/4/2 America/New York)	Accessing records that can be bookmarked is done with a single click. For example, if the administrator has view and edit rights selecting the record will take you into a consolidated Edit/View mode.

Job Aid: Navigation

Cross Entity Linking

When accessing any record, Learners frequently see related associations that they would like to investigate more fully. Cross entity linking makes each association a hyperlink and takes the Learner to the record in question. This means less searching and more efficient use of time. For example, within a curriculum's Contents tab from the Related area, an admin has the ability to select an item title and go directly to that item's record (Figure 24).

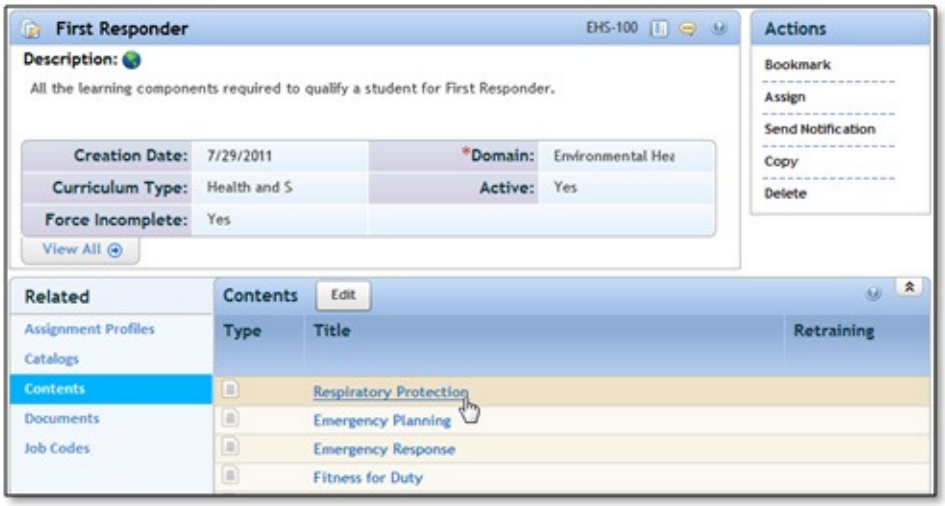


Figure 24: Cross Entity Linking

SEARCHING

The search feature is critical to most workflows in the system, including viewing records and using wizards. Each menu option selected on the left page will open up a search page. Use the search feature to:

- Create and delete a search filter
- Add and remove criteria from your search filter
- Adjust the display of your search results
- Save your search to use later
- Sort your search result
- Download search results to Microsoft Excel

***Note**: You can also use the Viewable Domains filter found under your Preferences section to further refine the results of your search. Your selected user-viewable domains are listed in the domains drop-down menu.*

Searches are filtered criterion-based queries to locate and access data within SATERN Learning. By entering search criteria, administrators can search for different types of results. On each search page, you will most likely see the following terms in the drop-down menu associated with most entities in your search criteria (Figure 25).

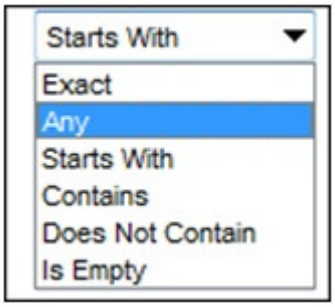


Figure 25: Search Criteria

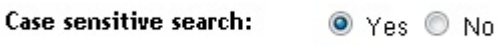
Select:

- **Exact** if you know the precise ID of the record. Enter the exact record ID and click **Search**. Only 1 value can be entered into the search field.

- **Any** to use multiple exact ID's or descriptions of the record. Enter one or more criterion separated by a comma and click **Search**. For example, if searching for all Learner records containing the last name *Smith* or *Smithfield*, enter the exact first names separated by a comma, select **Any** from the drop-down menu, and click **Search**.

- **Starts With** if you know the first part of an ID or description. Type the first few letters or numbers of the record and click **Search**.
- **Contains** if you know any part of the record ID or description. Enter the part of the ID/description you know and click **Search**.
- **Does Not Contain** if you know the ID or description does not contain a certain letter or number. Enter that text in the textbox and click **Search**.
- **Is Empty** to return all records where the specified field is empty. For example, if searching for all items without a title, select **Is Empt**y for the item title criteria and click **Search**. This operator is only available in non required fields.

You can choose whether or not you want your search to be case sensitive by setting the **Case sensitive search** option. To do a non-case-sensitive search, select **No** (if that is not the default setting). Please note that a non-case-sensitive search may take longer.



You can also choose whether or not you want your search to include all available locales. When enabled, the search includes all locales in the keyword search for all data that has been localized.

Commonly Used Search Icons

Table 2 lists the icons and their descriptions of the most commonly used search functions in SATERN Learning.

Table 2: Commonly Used Search Icons

Icon	Description
	The **Select Date** icon is associated with the date field. Use it to select and populate the corresponding date field.
	Use the **Filter by criteria** icon to find and select a corresponding entity to include in your search filter.
	Use the **Clear Filter** icon to clear the content of your corresponding search filter.
	Use the **Select from list** icon to find and select a corresponding entity to include in your search criteria.
	Use the **Clear Filter** icon to clear the list of filters of selected entities in your search filter.
	Use the **Search Picker** icon to select from a list or find and select the corresponding entity using a filter.

Job Aid: Searching

Adding/Removing Search Filters

Each entity in SATERN has multiple attributes and you may find that some of the attributes are more useful than others in conducting searches. SATERN gives you many search criteria filters to determine the attributes of the entity that you would like to use for your search.

The search filter determines the contents of your results by listing only entities that satisfy all the criteria specified by your filter. For example, you may want to list only Learners who are part of a specific organization. You must specify the organization in a filter and apply that filter to the search criteria to see only those Learners that relate to the selected organization. This is beneficial for administrators to search by various attributes of specific criteria when exact ID is not known.

To add or remove the org organization search filter:

1. Navigate to **Learners > Learners** .
2. If necessary, click **Add/Remove Criteria** ( ) to add the Organizations search criteria to the search screen.

***Note**: search criteria displaying on your screen will be persistent to your login*.

The Search Criteria pop-up window displays (Figure 26).

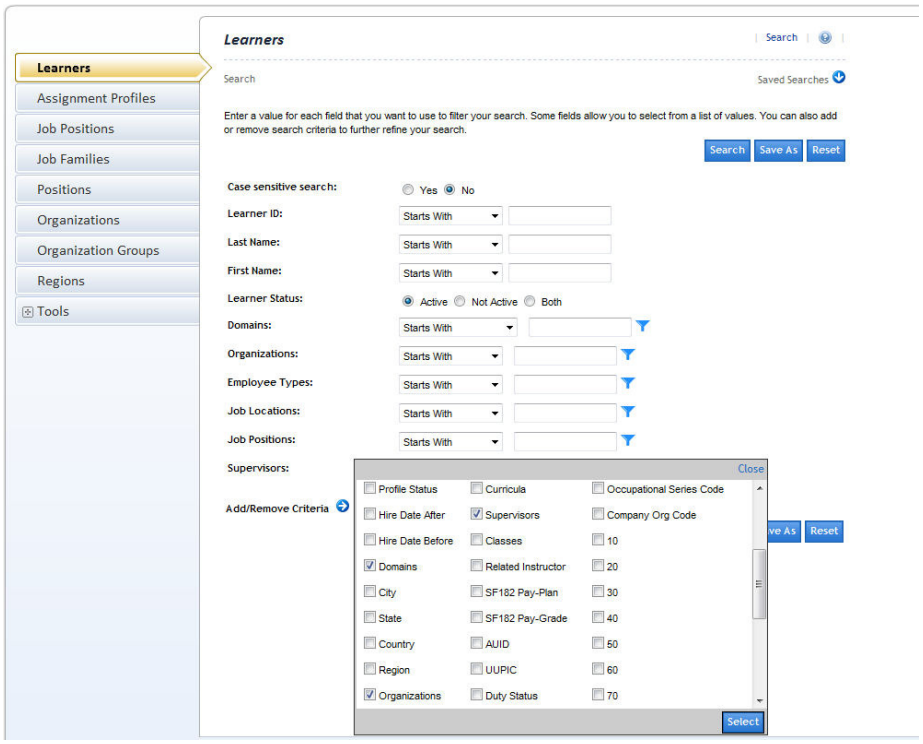


Figure 26: Search Criteria Pop-up Window

3. Click the **Organizations** checkbox.
4. Click **Select**.

The Organizations search query displays (Figure 27).

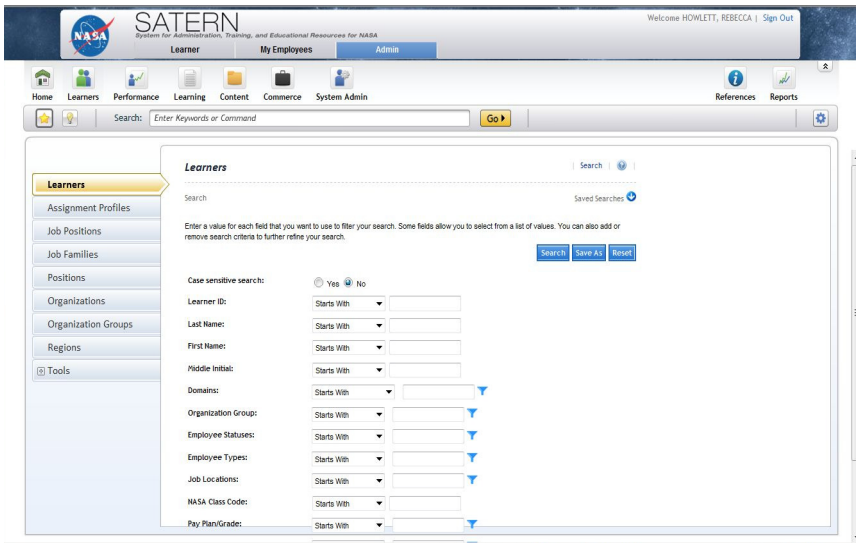


Figure 27: Selected Search Query Displays

5. To create the filter on the criteria, click the Organizations **Filter by criteria** icon ( ).
6. If you don't know the ID for the organization you are looking for, type in the search box for the attribute or Organizations on the screen.
7. Click **Search**.

Your search results are displayed (Figure 28).

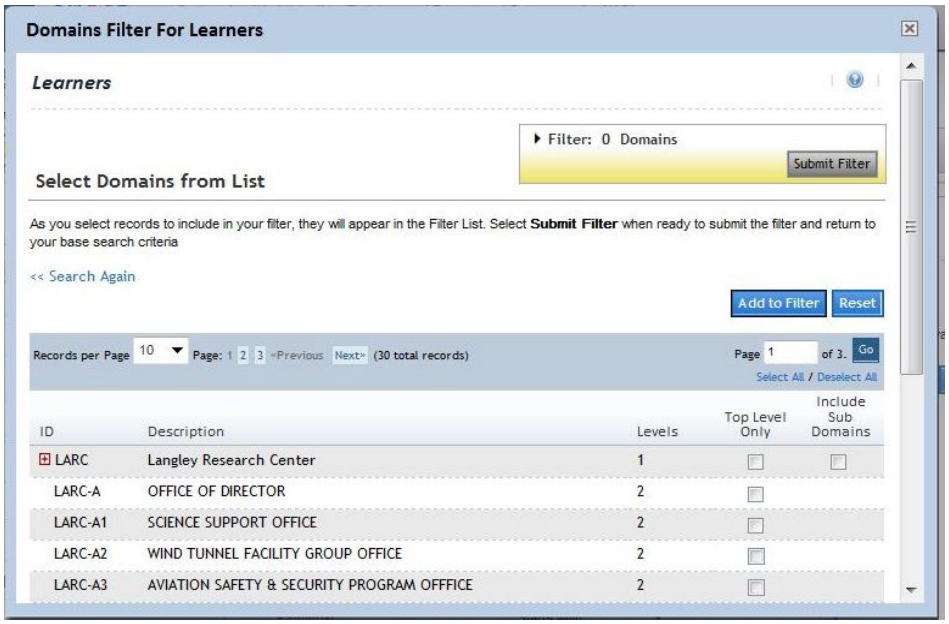


Figure 28: Search Results

8. Click the checkbox(es) to select your choice(s).
9. Click **Add to Filter**.

You're selected criteria will be displayed in the Filter (Figure 29).

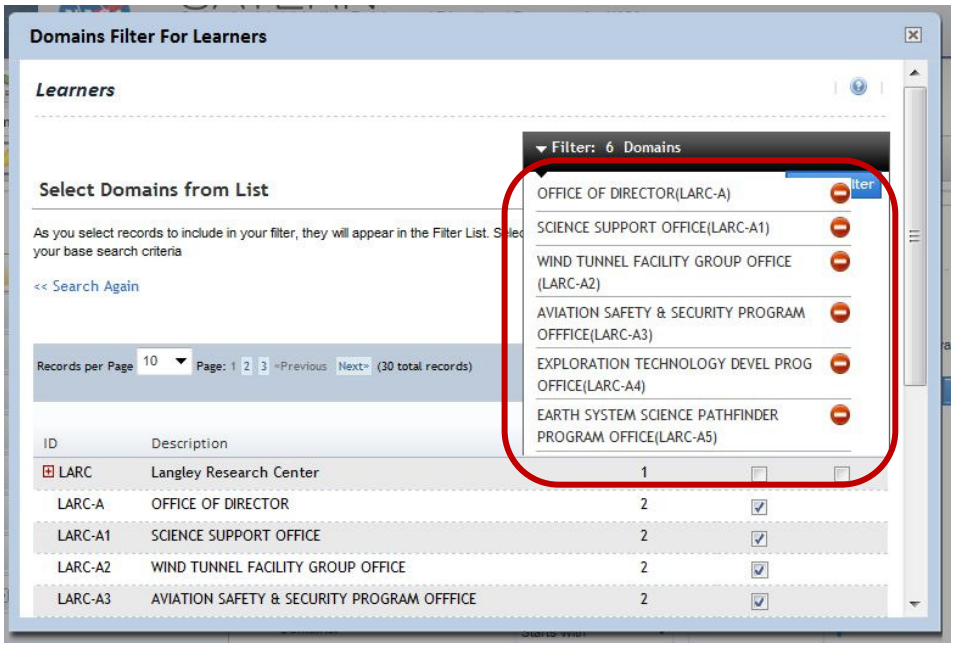


Figure 29: Search Filter Screen

10. Confirm your selection(s) are correct.
11. Click **Submit Filter**.

You are returned to your original search screen. You see that the organization search attribute has three (3) criteria selected for this filter (Figure 30).

Figure 30: Search Filter Criteria

12. You can modify this filter by clicking the Filter by criteria icon ( ), or you can clear the filter by clicking the Clear Filter icon ( ).

Selecting From a List

SATERN has a number of reference lists that you can select from without creating and submitting a filter. You must review the list, and check the objects you want to use in your search filter.

To narrow our search to show only Learners who are a particular employee type, such as *Civil Servant*:

1. Navigate to **Learners > Learners**.
2. If necessary, add **Employee Types** search criteria.
3. Click the employee types **Filter by criteria** icon ( ).
4. If you don't know the exact employee type ID, enter search criteria in the Search Employee Types section of the screen.
5. Click **Search**.

You see a list from which you can select one or more objects to populate the related field (Figure 31).

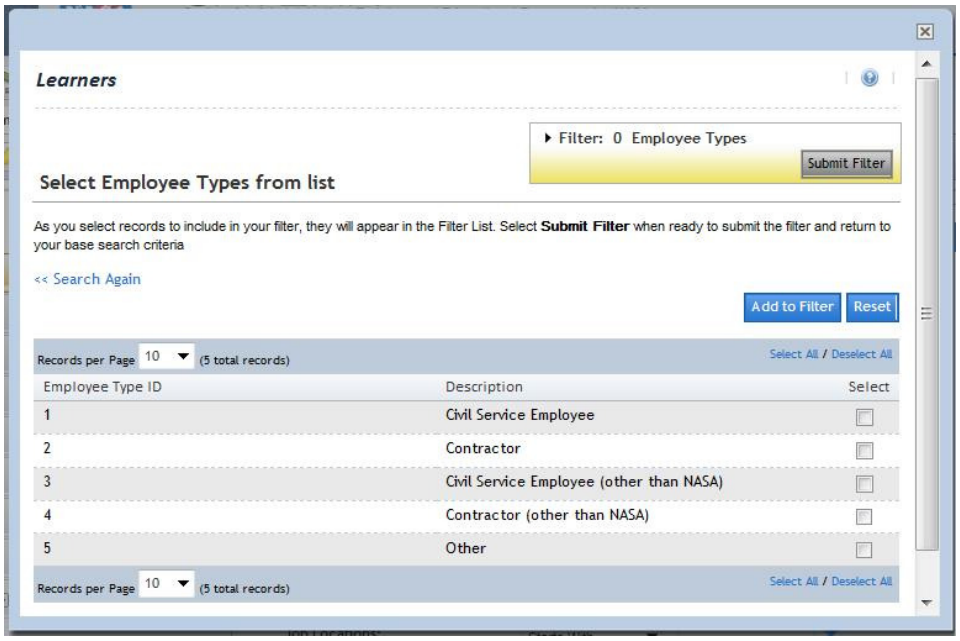


Figure 31: Create Filter Results List

6. Check the box for the record(s) you wish to select.
7. Click **Add to Filter**.

The selection is added to the search filter (Figure 32).

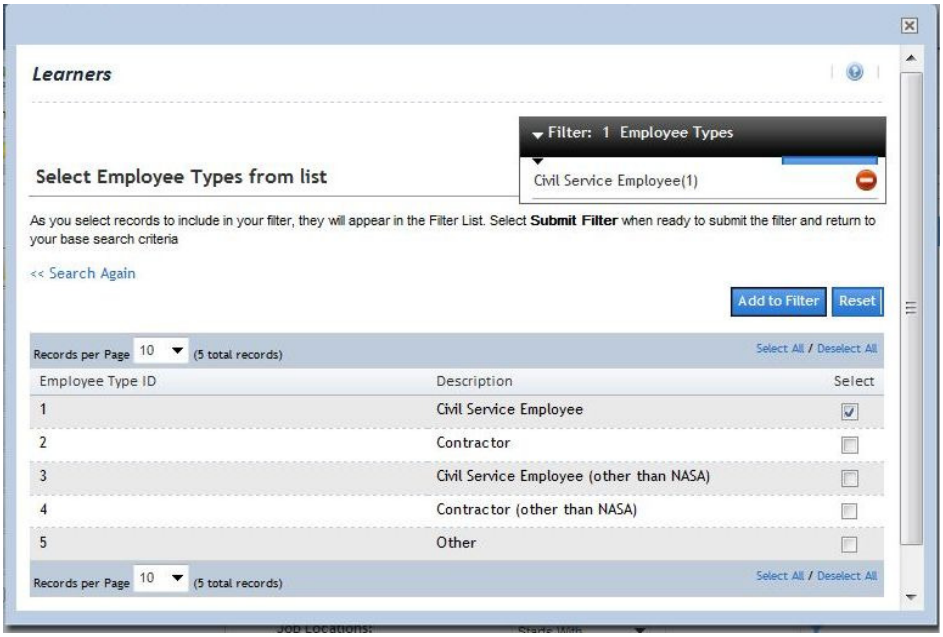


Figure 32: Criteria Added to Filter

8. Review the filter for accuracy.
9. Click **Submit Filter**.

You are returned to your original search screen and see the employee types search attribute has one (1) criteria selected for this filter (Figure 33).

Figure 33: Search Criteria Selected

10. To clear the list of selected entities, click the **Clear Filter** icon ( ).

Saving Your Individual Search

You can save a search filter and reuse the criteria specified in the search filter. The search filter is individual-based and available only to you.

To save the search we just defined for employee types:

11. Click **Save As** at the bottom of the screen (Figure 34).

Figure 34: Search Screen

The system prompts you for an ID for your saved search and a brief description of the search (Figure 35).

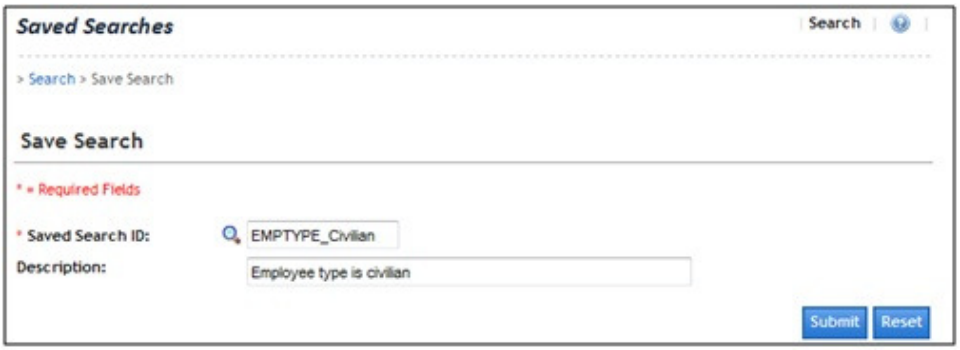


Figure 35: Save Search

12. Enter an ID with a description that is intuitive to make referencing it in the future easier. A Description is also strongly recommended.

13. Click **Submit**.

To access your saved searches:

1. Click **Saved Searches** at the upper right corner of the content frame (Figure 36).

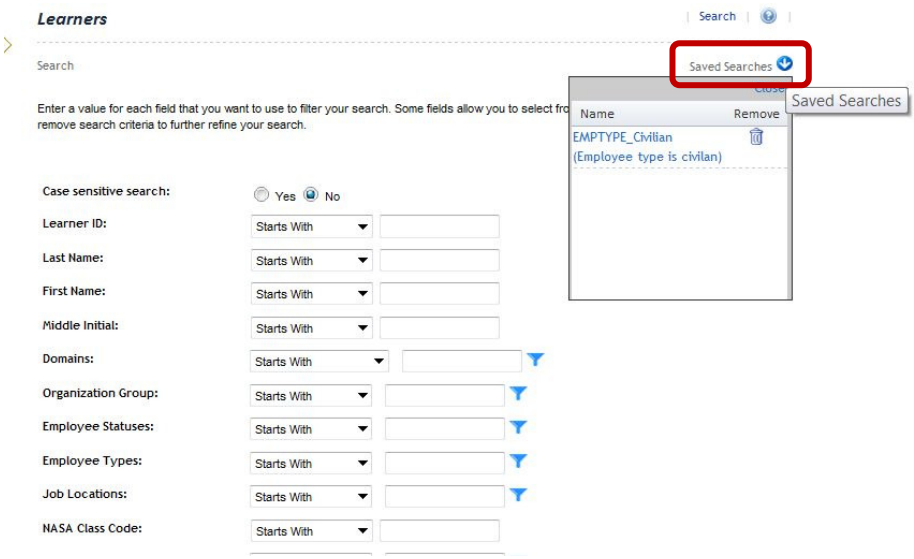


Figure 36: Search Screen: Saved Searches

2. Click to select the search you wish to conduct.

The selected search screen displays (Figure 37). The saved search ID and description are displayed at the top.

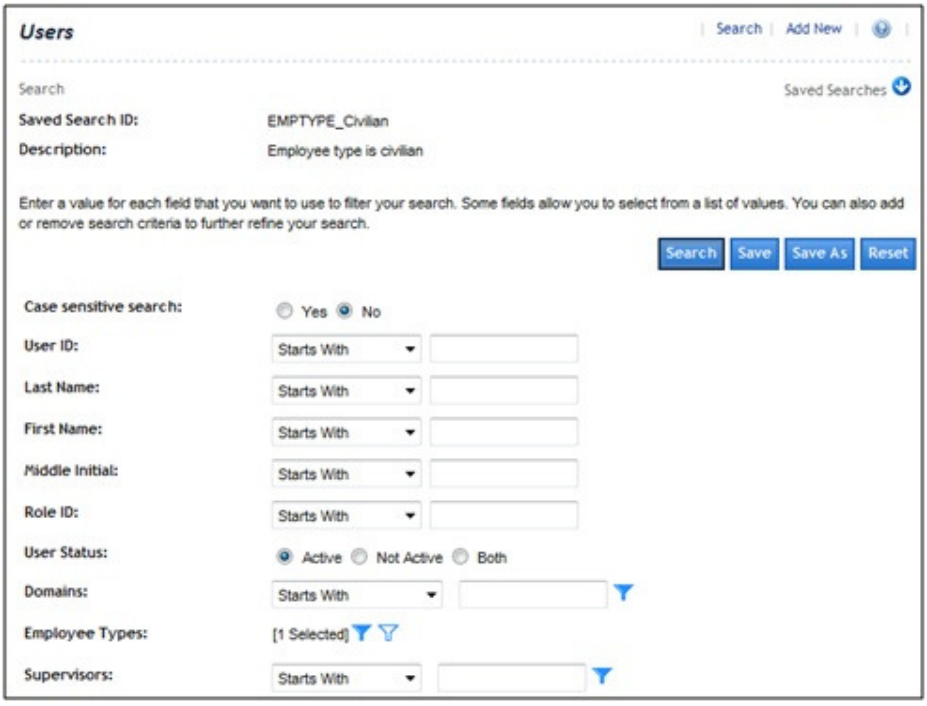


Figure 37: Selected Saved Search Screen

Adjusting the Display of Your Search Results

Your search result is the set of related entities that fit the search criteria you specified. You may, however, choose to review the results by specific fields not based on all of the attributes of the search result.

To adjust the display of your search results:

1. In the search results section, click **Field Chooser**.

The Field Chooser pop-up window displays. Use this window to determine which attributes of the listed entities to display in the search results and in which column. The first column (1) always displays the record's ID and is non-editable. For some entities, the second column is non-editable as well. You can add and/or remove other columns (Figure 38).

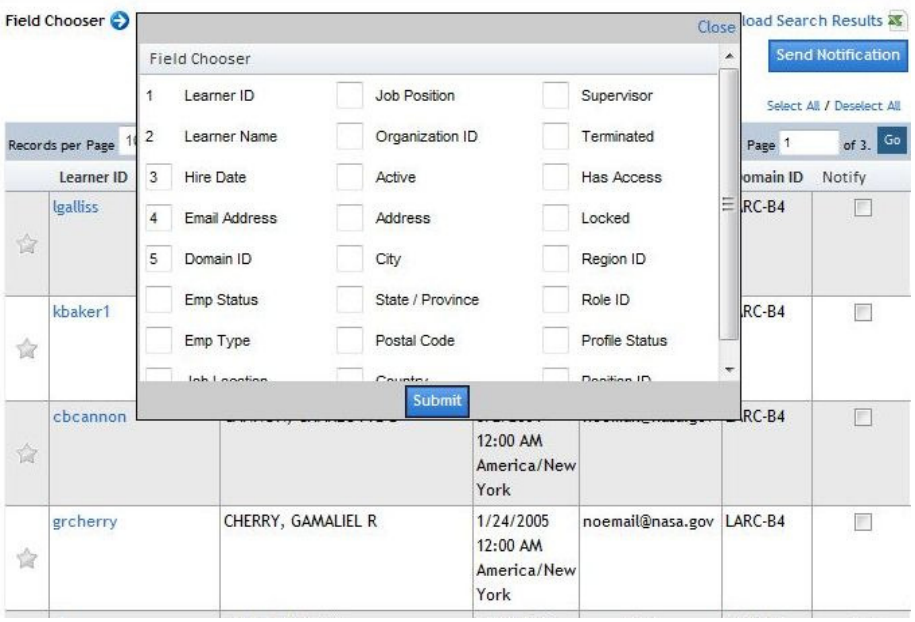


Figure 38: Field Chooser

2. Select the attributes you want to display. In this example, we want to show the *Job Location* field in the third column and the *Email Address* in the fourth column.

3. Enter the number of the column from the left in which you want to see the data. (Note that the column number you enter is sequential (i.e., 1, 2, 3, 4, etc.)
4. Click **Submit** to see your search results (Figure 39).

Records per Page 10 Page: 1 2 3 «Previous Next» (28 total records) Page 1 of 3. Go

	Learner ID	Learner Name ▲	Job Position	Email Address	Domain ID	Notify
	lgalliss	ALLISS, LOIS G	LaRC-PDN-B4050-1016187-001	noemail@nasa.gov	LARC-B4	
	kbaker1	BAKER, KATHLYN	LaRC-PDN-B4010-1003454-001	noemail@nasa.gov	LARC-B4	
	cbcannon	CANNON, CHARLOTTE B	LaRC-PDN-B4050-1009441-001	noemail@nasa.gov	LARC-B4	
	grcherry	CHERRY, GAMALIEL R	LaRC-PDN-B4020-1020876-001	noemail@nasa.gov	LARC-B4	
	rbcone	CONE, RANDY B	LaRC-PDN-B4030-1003254-001	noemail@nasa.gov	LARC-B4	

Figure 39: Search Results Display

Sorting Your Search Results

Once you have the results you are looking for, you can sort it based on key columns on your list (except the Description and Employee Status column/field).

To sort the list by an entity, find the column and click the header: an up arrow head indicates ascending order, A>Z; and a down arrow head indicates descending order, Z>A (Figure 40).

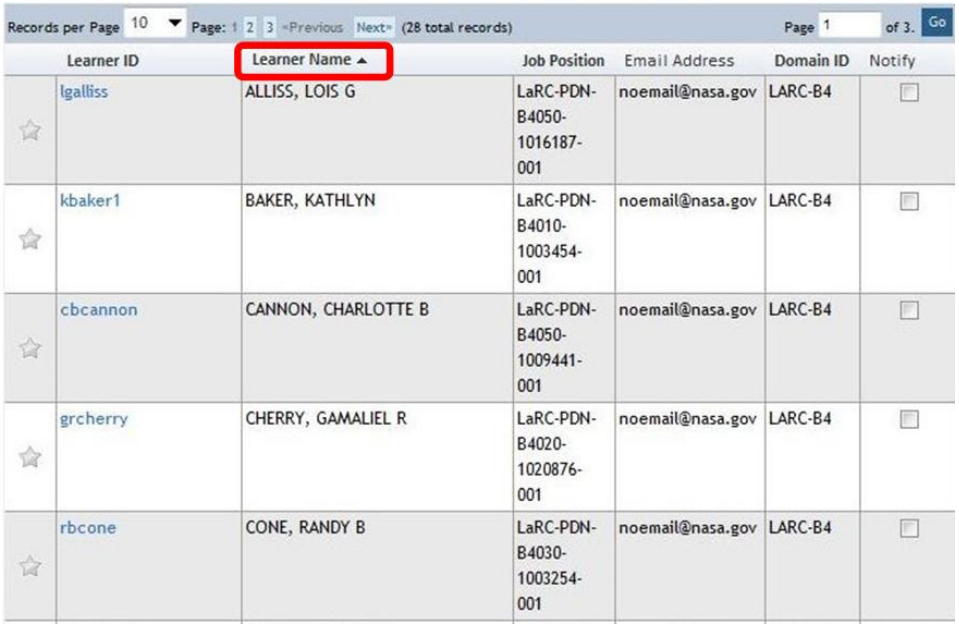


Figure 40: Sort Search Results

Downloading Your Search Results

Once you have the results you are looking for, you can download the search results to an Excel file:

1. Click **Download Search Results** (Figure 41).

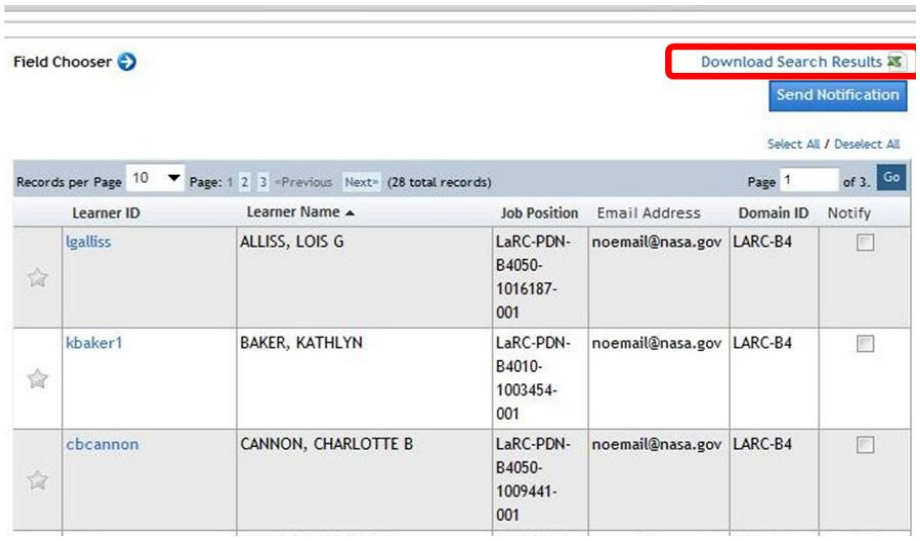


Figure 41: Download Search Results

2. Select whether to open or save the file in the dialog box (Figure 42).

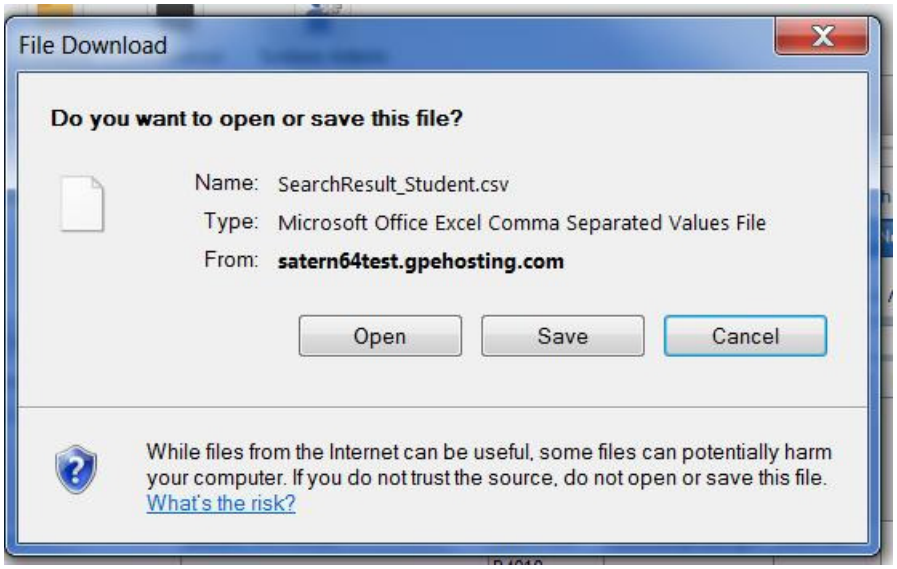


Figure 42: Open or Save Search Results

3. If selecting to **Save** the save dialog window opens. Save file to specified location.

KEYWORD AND QUICK COMMAND SYSTEM SEARCH

Using the Search Bar

Use the Search textbox to perform:

- Quick command searches
- Single searches
- Multiples searches

Quick Command Search

Enter a command to access that menu item; commands can return things such as: 'Add *entity'*, tools, and wizards. Executing the command takes the user to the area in the application where the command is found in the menus. Type-ahead is also available so

typing the word ‘learn’ will find Record Learning and Learning Editor among others. Reference and Report areas are not included in the command search.

Single Search

Entering an entity name highlights the ‘reserved’ word to show the admin that SATERN Learning has recognized it, for example *Item*. Adding more terms enables a search on the entity. Press **Enter** or click **Go** to activate the search.

Multiple Search

Entering non-entity names or commands executes a multiple entity search. The search, once activated, loops through entities in the system and searches them all for the entered value. You can pause and resume the search at any time during the entities being searched. The entities are searched in a specific order. Changing the order must be done through the back end. Each search response shows the entity where the record was found. Search results are limited to common fields across all entities (IDs, name/title/description). Workflows and domains still control access to commands and search results. Search results can be filtered with the header and typing in your filter or selecting from the drop-down menu.

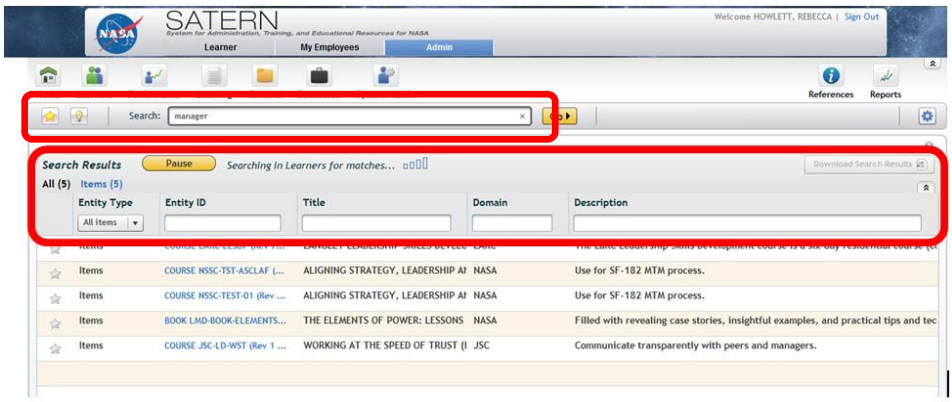


Figure 43: Using Search Bar

The header area of the search shows live results, which record types (items, Learners, assignment profiles, etc.) the system is searching, and the number of records found. The system groups these results by entity type: the first column in the table (Figure 43). You can use the drop-down menu to further define your search. Because the system updates the results in real time, you can click **Stop** to stop the search whenever you think you have identified the record that you're looking for. When you click **Download Search Results**, the system converts the search results into a .CSV file. Use one, some, or all of the textboxes at the top of columns to perform a "type ahead" filter on your current view. The results area of the search displays all of the records containing the string that you enter into the search textbox, even if the records are different types of records (items, Learners, assignment profiles, etc.). Once the search is conducted the Admin can sort the order of results by clicking the field headings at the top of the table. Depending on the Administrator's role he or she may have access to access the record in either view or edit mode.

RECORD LAYOUT CONSOLIDATION

Commonly used record types can be accessed in a consolidated format to view and edit. This allows better access to the information with commonly used information more obvious, and data accessed less frequently more recessed, to make the entire experience more intuitive. Information about how to globally configure records will be provided in the "System Administration" section (Figure ??).

Figure 53. Item Record Layout – need new

Record Layout Configuration (Personalize Fields)

In addition to the basic record layout being architected to bring the most useful information to the forefront, each record is configurable to allow the administrator to tailor this layout. Click the **Personalize Fields** button ( ) to define the summary fields and set to required if desired, so that the information that is necessary within the customer business process is now mandatory.

In the Personalize pop-up window, select one or more available fields from the left column. Click the Add or Add All button in the middle to add the selected fields to the Display column on the right. All fields listed in the right column will be displayed in the core area of the record. Click the **Required** checkbox to the left of fields you want to configure as mandatory (Figure 44).

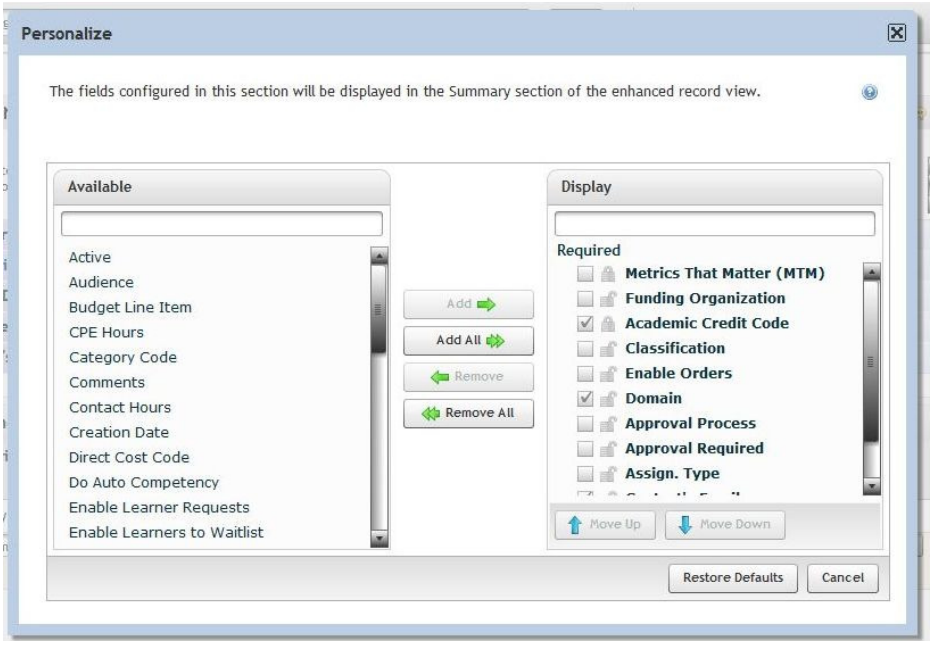


Figure 44: Personalize Fields Pop-up

In addition, the various associations themselves can be turned off to simplify the layout and remove unneeded fields and data from the interface.

RECOMMENDED NEXT

Once a record that can be bookmarked has been added, the system will provide a few choices for what can be done to make the record more usable. This allows new administrators to understand what can and should be done to make this record and the system more functional overall. When you click the **Recommended Next button** (), the system shows all of the actions that you might want to take next. The recommended next steps are intelligent and will disappear once the action shown has been completed (Figure 45).

Figure 45: Recommended Next Pop-up

CONCLUSION

In this lesson, you were introduced to the general guidelines for accessing, navigating, and searching within SATERN Learning.

You should now be able to:

- Identify admins and learners in SATERN Learning
- Navigate within SATERN Learning as an admin
- Use the keyword/quick command Search function
- Work with and organize bookmarks
- Create search filters and search for records in SATERN Learning
- Download and view or save search results

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. What is the difference between an admin and a learner of the SATERN Learning system?

Admin:

Learner :

2. Scenario: You're conducting a search for a learner record. Unfortunately, you only know that this learner's last name starts with the letter R. On the learners search screen, which are the best search criteria to select from the drop-down menu to return all learners whose last name begins with the letter R?

a) Any

b) Starts With

c) Contains

d) Is Empty

NOTES

Lesson 2: Learning Needs Management Overview

The goal of this lesson is to introduce you to the Learning Needs Management Model and how it is implemented in SATERN Learning. You will also learn the terms and their definitions as they are used in the model.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Describe the Learning Needs Management Model
- Explain the process of implementing the model
- Identify and define the terms associated with the model

LEARNING NEEDS MANAGEMENT MODEL

By implementing SATERN's enterprise-wide Learning system, your organization can easily track and report on the current training status of your Learner population. The system can help determine who needs training, make training assignments, schedule offerings, track offering registrants, and track which Learners have attempted/completed their training requirements.

In order to begin understanding the Learning Needs Management Model, it is important to learn some key terms and definitions that are associated with the model (Table 3).

Table 3 : Learning Needs Management Model Terms and Definitionsl

Term	Definition
Learner	Any person for whom a database record has been created, including employees, contractors, and others for whom you wish to maintain learning records and to register in courses.
Item	An assignable unit whose assignment and completion can be tracked. It may be a learning or non-learning item.
Curriculum	A group of one or more Items that can be assigned to Learners and have its completion status tracked as a group.
	List of items assigned to a Learner that must be completed. It also contains the date by which each item should be completed.
Learning Event	A Learner's participation in the completion of an item or external event. For items, this record contains completion status, date, and other information.
Learning History (Completed Work on Learner side of application)	A record of all recorded learning events for the Learner.

The Learning Needs Management Model (Figure 46) outlines the basic workflows surrounding the grouping of items, assigning items to a Learner's Learning Plan, and recording a completed learning event to be listed in the Learner's Completed Work (Learning History).

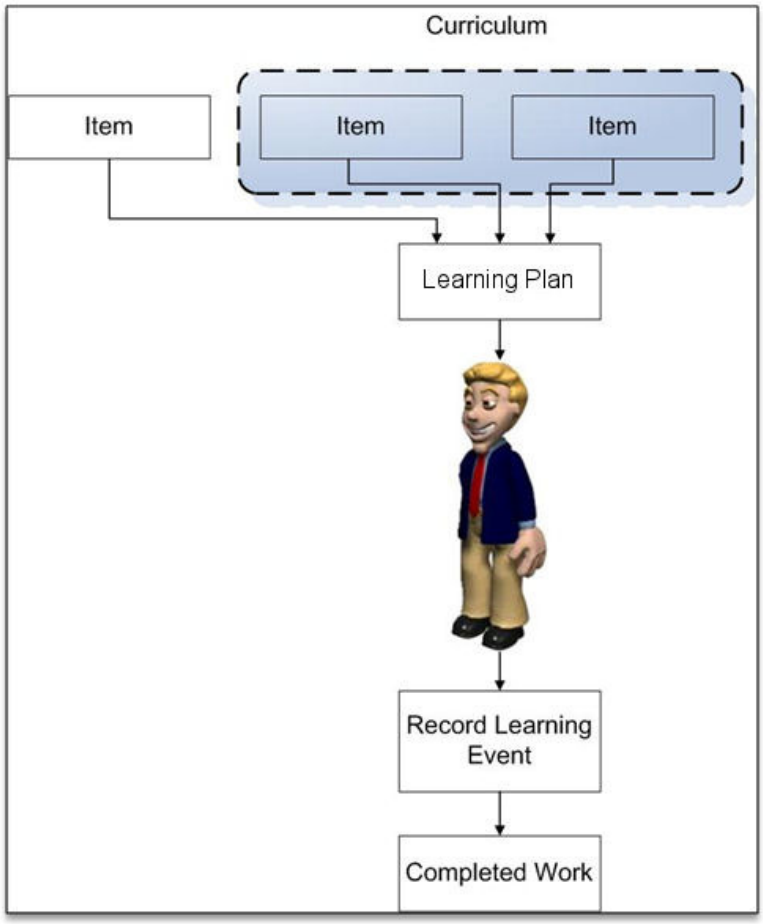


Figure 46 : Learning Needs Management Model

Implementing the Learning Needs Management Model

The following steps should be followed to successfully implement the Learning Needs Management Model:

1. Identify learning needs (outside SATERN Learning).
2. Add items in SATERN Learning.
3. Add curricula in SATERN Learning.
4. Assign learning needs to Learners.
5. Record learning events.

Figure 47depicts the process required to implement the Learning Needs Management model.

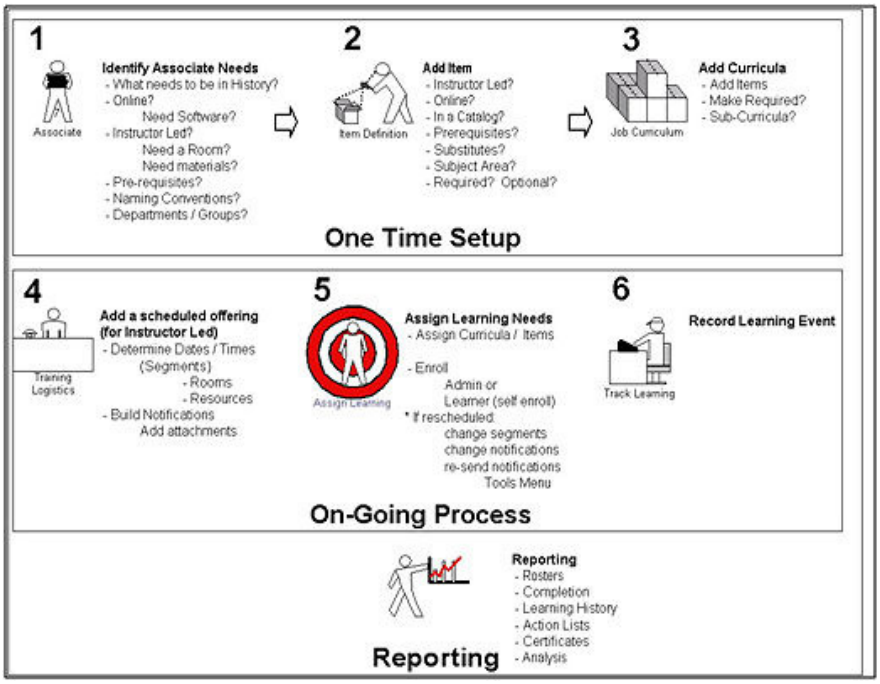


Figure 47: Implementing the Learning Needs Management Model

Job Aid: Introduction to Learning Needs Management

CONCLUSION

In this lesson, you were introduced to the Learning Needs Management Model and how it is implemented in SATERN Learning. You also learned the terms and their definitions as they are used in the model.

You should now be able to:

- Describe the Learning Needs Management Model
- Identify and define the terms associated with the model
- Explain the process of implementing the Learning Needs Management Model

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. Match the term in column A with its definition in Column B.

	Colum A	Colum B
	Learner	A. A group of one or more Items that can be assigned to Learners and have its completion status tracked as a group.
	Item	B. A record of all recorded learning events for the Learner.
	Curriculum	C. A list of items assigned to a Learner that must be completed. It also contains the date by which each item should be completed.
	Learning Plan	D. A Learner's participation in the completion of an item or external event. For items, this record contains completion status, date, and other information.
	Learning Event	E. An assignable unit whose assignment and completion can be tracked. It may be a learning or non-learning item.
	Learning History (Completed Work)	F. Any person for whom a database record has been created, including employees, contractors, and others for whom you wish to maintain learning records and to register in courses.

2. Put the following steps in order to successfully implement the Learning Needs Management Model in SATERN Learning.

_____ Add curricula to SATERN Learning.

_____ Assign learning needs to Learners.

_____ Add items to SATERN Learning.

_____ Record learning events.

_____ Identify learning needs (outside SATERN Learning).

Lesson3: Working With Learner Records

SATERN Learning is centered on the Learner and gives an admin the ability to identify the training that Learners have successfully accomplished, need to accomplish, or are in the process of completing. The goal of this lesson is to familiarize you with the attributes found in the Learner record.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Identify the characteristics of a Learner record
- Identify and describe the main tabs of the Learner record
- Access an existing Learner record
- Add and modify a Learner record

LEARNER MAIN CONCEPTS

A Learner is any person in an organization for whom past, present, and future learning records must be tracked. A Learner may be an employee or a contractor. He/she has access to SATERN Learning from the SATERN Learning application to view his/her training information and, if identified as a supervisor, may view subordinate training information.

MAIN AREAS OF THE LEARNER RECORD

The Learner record is divided into three main areas (Figure 48):

- Core (red outline at the top left)
- Related (yellow outline at the bottom half)
- Actions (green outline at the top right)

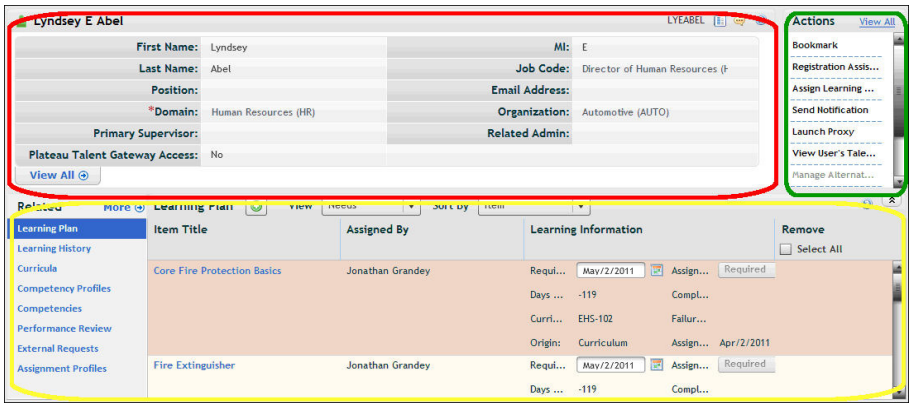


Figure 48: Learner Record

Core Area

The core area contains the basic information of the Learner record, including the Learner's name, position, email, organization, supervisor, and job code. To edit any field in this area, click in a displayed field and enter text or select a reference value (depending on the field type). You can also view and enter additional information by clicking View All ( ) located at the bottom left of the core area. Once expanded, the screen displays the following sections where updates can be made:

- Summary: Name, Position, Domain, Supervisor, Job Position, Email Address, Organization, Primary Supervisor, Related Admin, Plateau Talent Gateway Access

- Extended Summary: Active, Coach, Role, SF 182 Pay-Plan, UUPIC, AUID, Duty Status, Company Name, Last Email Address, Supervisor By-Pass Flag, COTR, Company Org. Code
- Employment: Employment Status, Employment Type, Hired, Job Location, Job Title, Region, Prior Years of Service, Prior Months of Service Related Instructor, Resume
- Reset Password: New Password, Verify Password

Related Area

The Related area of the Learner record contains additional information regarding the Learner (Figure 49).

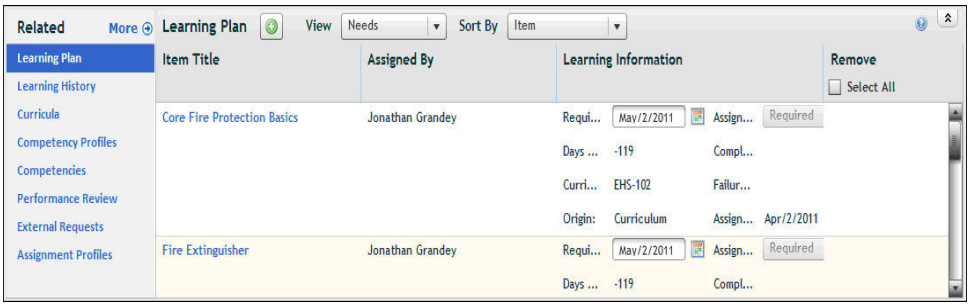


Figure 49: User Record > Related Area

The related area displays a list of items that administrators use most frequently when interacting with the Learner record. Select a Related tab on the left (i.e., Learning Plan) to display the details on the right. Click More to see additional Related tabs. The More link displays a list of items that administrators need but use less frequently. (The Related and More displays are configured in **System Admin > Configuration > Record Configuration**.)

Table 4 provides a list of and descriptions of the default Related tab.

Table 4 : Related Tab Descriptions

Option	Description

Learning Plan	The Learning Plan tab is used to assign items to a Learner's learning plan and manage a Learner's assigned items.
Learning History	The Learning History tab is a transcript of all the items a Learner has ever taken.
Curricula	The Curricula tab is used to assign curricula as well as manage all of the curricula that is assigned to the Learner, regardless of how the curricula was assigned.
Competency Profiles	The Competency Profiles tab is used to associate a Learner with one or more competency profiles. When you associate a Learner with a competency profile, the system adds all of the competencies that are associated with that competency profile to the Learner's Competencies tab.
Competencies	The Competencies tab is a list of all assigned competencies, regardless of how they were assigned (through a competency profile or as free-floating competencies).
not shown under Related tab	The Performance Review tab is used to manage the Learner's performance reviews (create, cancel, reroute, view status, approve/deny).
External Requests (SF-182)	The External Requests tab is used to add, edit, approve, and withdraw the Learner's External Requests (a form used when Learners want to attend a training event that is not managed by SATERN Learning).
Assignment Profiles	You can use the Assignment Profiles tab to review all of the assignment profiles that a Learner belongs to.
Available under More →	
Phone Numbers	The Phone Numbers tab is used to create or manage the different phone numbers that are associated with a Learner.
Registration	The Registration tab is used to view the Learner's scheduled offering registrations.
Requests	The Requests tab is used to view the requests that a Learner made from the Learner interface for instructor-led or blended items.
Online Status	The Online Status tab is used to review any of the items that 1) are assigned to the Learner's learning plan and 2) have online content.
Assessments	The Assessments tab is used to track a Learner's progress and statistics regarding his or her competencies.
Commerce	The Commerce tab is used to edit the Learner's shopping account, billing, and shipping information.
Account Code	The Account Code tab is used to select an authorized account code to associate with a Learner so that the Learner can purchase items

	that have a price using the chargeback payment method.
Catalog Preview	The Catalog Preview tab lists all the catalogs that a Learner can access.
Preferences	The Preferences tab is used to set or change a Learner's time zone, currency, locale, and locale format options.
Approval Role	The Approval Role tab is used to associate the Learner with an approval role so that an administrator can assign the role to the Learner for an approval process.
Approvals	Some items require that Learners receive approval before they gain access to the item. In these situations, Learners must request approvals, which administrators can review from the Approvals tab.
Organization Dashboard	The Organization Dashboard tab is used to manage a Learner's ownership privileges for dashboards.
Organization Initiatives	You can view, add, or remove a Learner's ownership privileges for initiatives by using the Organization Initiatives tab.
Succession Planning	The Succession Planning tab is used to manage a Learner's ownership privileges for succession planning and talent searches.
Alternate Job Codes	The Alternate Job Code tab is used to add and edit alternative job codes (also called secondary job codes) that are associated with a Learner; you can find a Learner's primary job code in the Job Code box on the Summary tab (Core area).
Surveys	The Surveys tab is used to view information about surveys associated with the Learner and details for the items that are associated with each survey. When a Learner completes an item that is associated with a survey, SATERN Administration adds the survey to this tab. When a Learner completes the survey, SATERN Administration removes the survey from this tab.
Skills Inventory	You can use the Skills Inventory tab to manage the skills (and their ratings) that are associated with a Learner.

Learning Plan Tab

The Learning Plan tab (Figure 50) displays items assigned to the Learner individually or as part of a curriculum. The Learning Plan shows items not yet completed, and items completed but are part of a curriculum and need to be completed again. Admins can view the

assignment type and required completion date for each assigned item.

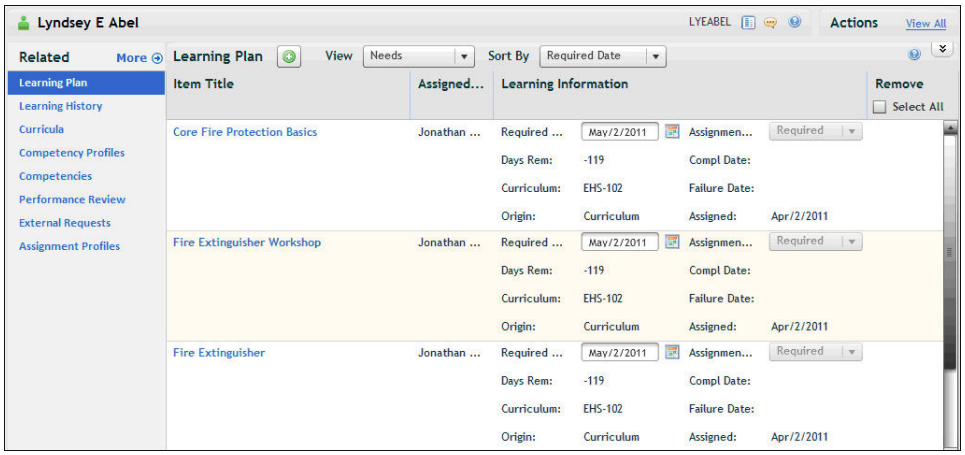


Figure 50 : User Record: Learning Plan Tab

Learning History Tab

The Learning History tab (Figure 51) displays the list of items completed by the Learner. It also displays external events (learning completed for training that is not identified as an item in SATERN, such as a college course or seminar outside of the organization). Each Learning History record includes the completion status (*For Credit* and *Not for Credit*), completion date/time, and any other details (i.e., instructor, credit hours, and comments) entered when the learning event was recorded, as well as file attachments associated with the learning event.

Figure 51: Learning History Tab

Curricula Tab

The Curricula tab (Figure 52) lists each curriculum that has been assigned to the Learner. Admins can view the status and item details of each assigned curriculum, including individual item completion status and curriculum requirements, if any. Admins can also assign a curriculum to a Learner through this tab.

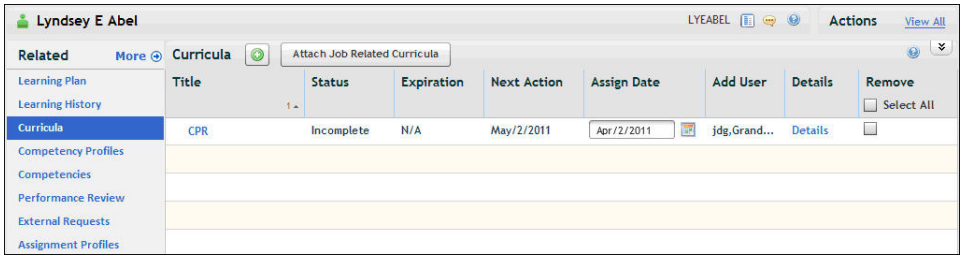


Figure 52: User Record: Curricula Tab

Actions Area

The Actions area of the Learner record contains links to additional actions that can be taken on the Learner record, including (Figure 53):

- Bookmark (add the Learner to the admin bookmarks)
- Registration Assistant (initiates the Registration Assistant tool)
- Assign Learning Needs (initiates the Learner Needs Management tool to enable you to batch assign items and curricula to one or more Learners)
- Send Notification (initiates the ad hoc notification wizard)
- Launch Proxy (initiates proxy feature)
- Manage Alternate Supervisor (allows you to identify alternate supervisor for Learner)
- Reset Learner Pin (resets the Learner's pin)

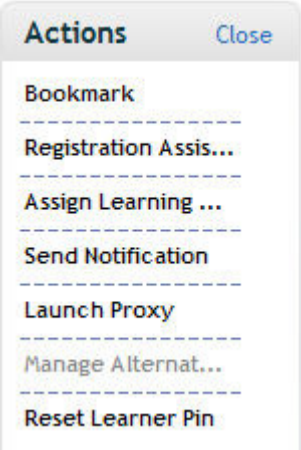


Figure 53: Actions Area of User Record

***Note**: Many of these actions are covered in either the Learning Needs Management course and/or the Scheduling Management course.*

Lab 1. Locate and View a Learner Record

Step

1. Navigate to **Learners > Learners**.
2. Enter your search criteria in the appropriate textboxes.
3. Click **Search**.
4. Locate your Learner from the search results list.
5. Click a Learner ID to open the record.

Job Aid: Add and Edit Learner Records

CONCLUSION

In this lesson, you were introduced to Learner records along with the key information contained within each record. Step-by-step instructions were provided for viewing and adding a Learner record to SATERN Learning. Additionally, the instructor demonstrated how to create the supervisor-subordinate relationship.

You should now be able to:

- Identify the characteristics of a Learner record
- Identify and describe the main sections of the Learner record
- Access an existing Learner record

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. Which of the following is not a required field in the Learner record?
   a) Learner ID
   b) Email address
   c) Domain
   d) Role
   e) None of the above
2. What information is found on the Learning Plan tab?

3. True or false:

The Learning History tab displays those items a Learner has completed including the date those items were completed.

Course Summary

Through discussion, demonstration, and hands-on computer lab work, this course taught you the concepts and terminology associated with SATERN Learning. You were introduced to searching and navigation, and adding and modifying Learners in SATERN Learning. You also gained basic skills on how to create and modify Learner records using the step-by-step, hands-on lab exercises.

You should now be able to:

- Navigate and use the search functions within SATERN Learning
- Define specific terminologies associated with SATERN Learning
- View Learner records

NOTES

Appendix A: Running, Saving, and Creating Recurring Reports

A priority for many administrators (admins) is to be able to run detailed reports. The overall goal of the Reports lesson is to provide you with the knowledge needed to use the SATERN Learning report interface to run, save, and create recurring report jobs.

BECOMING FAMILIAR WITH THE REPORT INTERFACE

SATERN Learning is accessed either as an admin or as a Learner. Admins are able to run reports on Learners they have access to which is determined by the domain restrictions applied to their admin accounts. Learners, on the other hand, are only able to run reports on themselves; however, if the Learner is listed as a supervisor in SATERN Learning, that Learner is able to run a report on him/herself and any of his/her direct or indirect subordinates. The SATERN report interface is broken down into three main tabs:

- Saved Reports
- Reports
- Report Jobs

Reports

The most common use of the Reports tab (Figure 54) is to run available reports within the system. To find the desired report, browse the provided list under the Reports tab or use the Search textbox and Browse By options on the left side of the report interface to search for reports by the title or description. To further assist in the

search for a desired report, narrow the search results by checking the corresponding checkbox in the left hand corner to select very specific categories of reports.

***Note**: If you do not see a report you think you should have access to, check to see if anything in the left **Search** or **Browse by** areas is narrowing the list too much.*

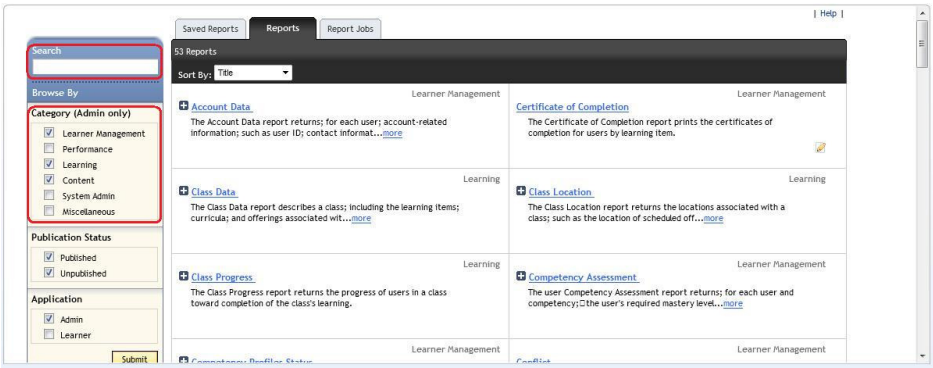


Figure 54: Reports Tab

Saved Reports

Once you create a saved report, you can access the report and run it without reentering filtering options. Saved reports are located under the Saved Reports tab (Figure 55), and are specific to your admin account, meaning that saved reports are not shared among admins in the system. A saved report is very similar to a saved search in SATERN Learning – only the admin who created the saved report is able to see it.

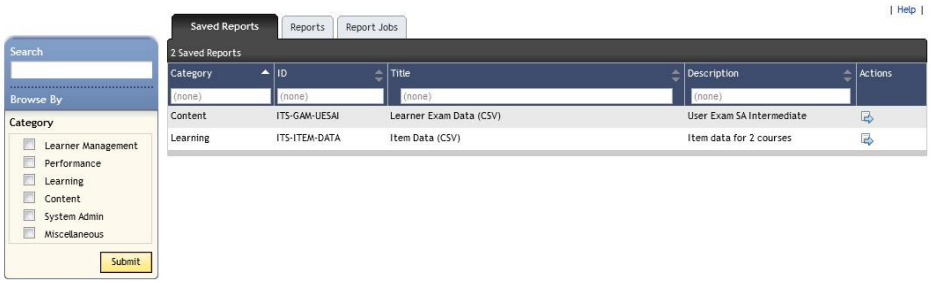


Figure 55: Saved Reports Tab

Report Jobs

The Report Jobs tab lists the current background report jobs which are automatically running in the background (Figure 56). Jobs are created under this tab when you schedule the report to occur on a recurring basis. On this tab, you can delete jobs from recurring or edit the schedule of when the report should run.

Note: Reports that are scheduled to run only once display under System Admin > Background Jobs, not here.

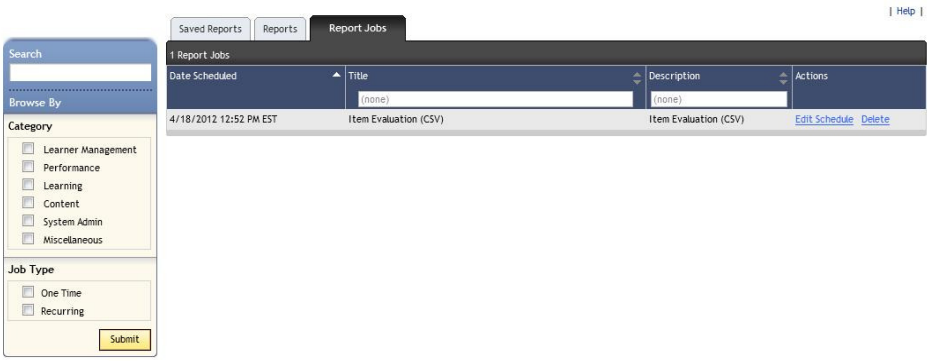


Figure 56: Report Jobs Tab

IDENTIFYING THE REPORTS SECTION

Each report is divided into two main sections: formatting and criteria.

Formatting

The top section of the Run Report screen contains the following formatting options (Figure 57):

- Modify the report title, header, and footer.
- Determine the report destination (the location where the report engine returns the data). You can return the data to the browser or to a local file. When you select **Browser**, the report is displayed in the internet browser window. When **Local File** is selected, you should save the report to a local drive before you open it.
- Determine the report format. Table 5 lists the available report formats and their usage.

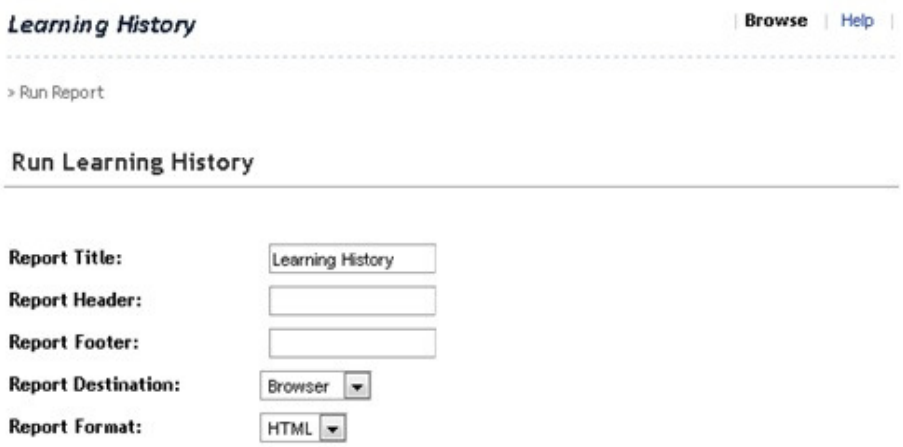


Figure 57: Run Report Screen: Formatting Options

Table 5 Available Report Formats and Usage

Format	Usage
XML – rarely used (May not be available for all reports)	Import the data into a database and for troubleshooting a report. Used by the NSSC.
CSV	Open the data in a spreadsheet format, in an application like Microsoft Excel, or import data into a database, such as Microsoft Access.

HTML	View results quickly in a browser window.
PDF	Print, save, and email the report.

Criteria

The selected report dictates the criteria displayed at the bottom of the Run Report screen. This section provides all the tools and functionality from searching. Report pages filter the data that the report returns using specific search fields. However, many reports also contain the following controls for filtering the data that you want to return:

- **Mask User IDs**: For security reasons, SATERN can mask the user IDs so it displays as a series of asterisks. Check the checkbox to hide user IDs.
- **Case Sensitive Search**: You can choose to perform a case-sensitive search or a case-insensitive search. Case-sensitive searches return data elements only when the characters and case match. Case-sensitive reports run faster than case-insensitive searches.
- **Page Break Between Records**: For longer reports, there is an option to insert page breaks between records.
- **Filter by Criteria**: Some fields in the report pages contain a **Filter by Criteria** link. When you click the filter icon, a page opens that contains multiple search fields in which you can select a set of data rather than a single data element. For example, you can return the set of Learners who are in the job location Washington, DC rather than entering multiple Learners in the search field (Figure 58).

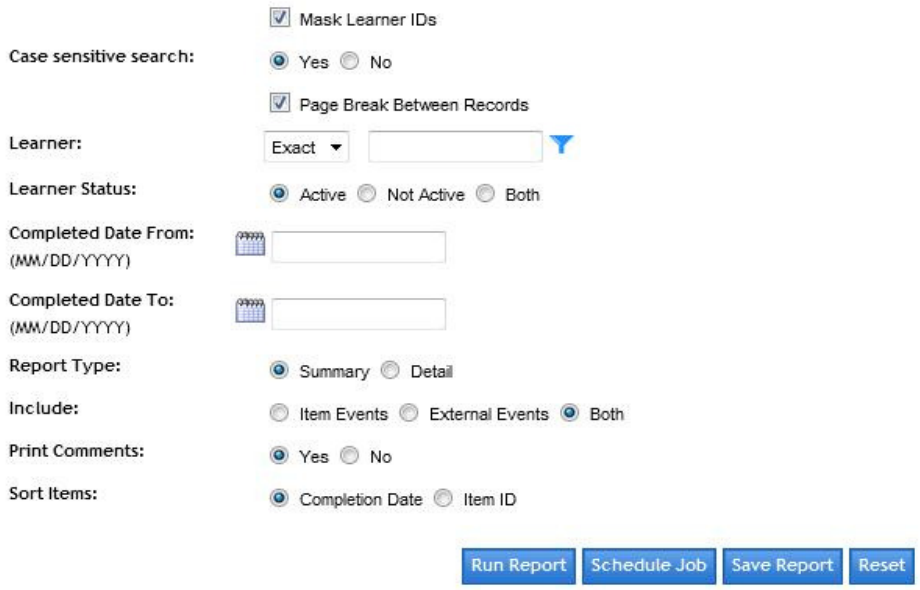


Figure 58: Run Report Screen: Criteria Optoins

SUBMIT FILTER INFORMATION AS CRITERIA

If you are saving a report to be run at a later time or scheduling a report to run on a recurring basis you may want the report to dynamically update the search filters. In this situation, you must save the criteria of the search instead of selecting results.

For example, Chase wants to run a report on all of Dennis Conrad's subordinates. Chase filters the Learner search using Dennis Conrad as the supervisor, and then selects all of his subordinate IDs to the filter. By doing this, Chase is selecting actual Learners to include on the report.

What happens if Dennis is assigned another subordinate next week? Chase would have to search again and add the new subordinate to the filter in order to include him/her on the report. An easier method, and one especially useful if you are going to save the report and run

it later or set the report to recur, would be to submit Dennis Conrad's information as criteria.

Creating search filters in reports determines the contents of your results by listing only entities that satisfy all the criteria specified by the filter(s) created. For example, in this case we want to run a Learning History Report for all Learners who report to Dennis Conrad. You must specify the supervisor(s) in the Learner filter and apply that filter as criteria in order for the report to be dynamic.

To submit a supervisor as criteria:

1. Access the **Learning History Report**.
2. Click the **Filter by criteria icon** ( ) next to the Learner criteria.
3. If necessary, click **Add/Remove Criteria** to add the supervisor search filter to the search screen.

The Search Criteria pop-up window displays (Figure 59).

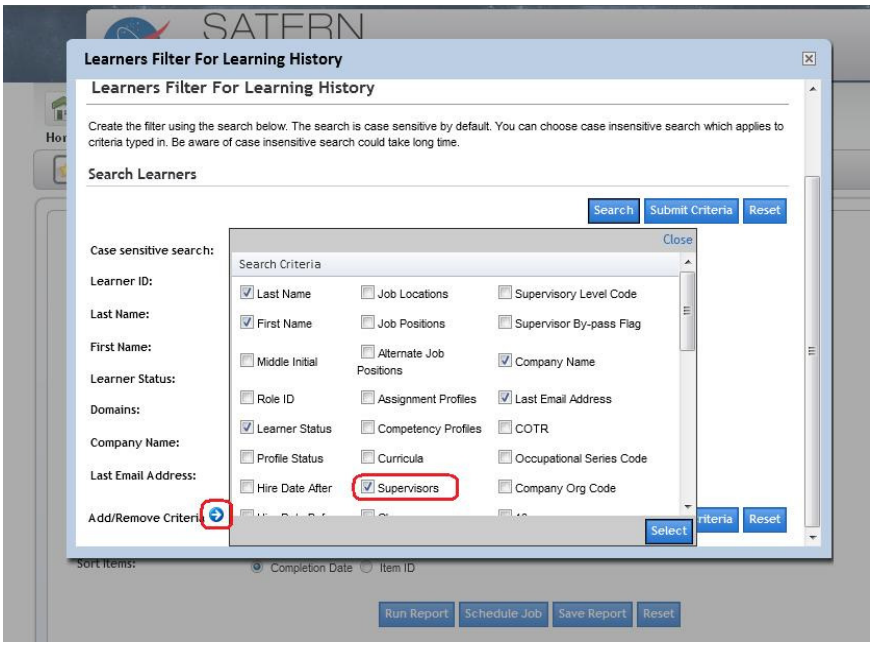


Figure 59: Search Criteria Pop-up Window

4. Click the **Supervisors** checkbox.
5. Click **Select**.

The Supervisor search query displays (Figure 60).

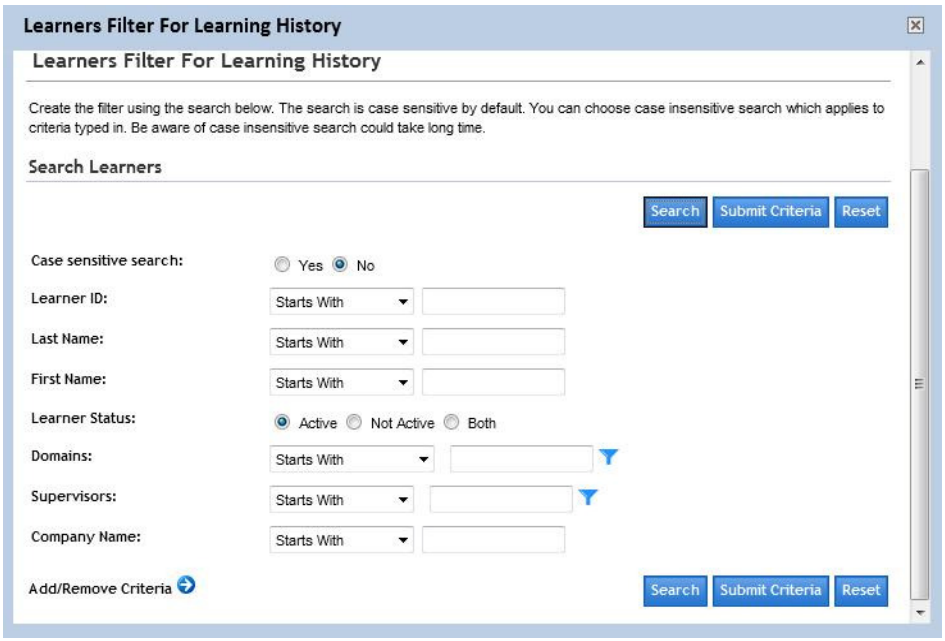


Figure 60: Selected Search Query Displays

6. To create the filter, click the Filter by criteria icon ( ).

The Create Filter by Supervisor screen displays (Figure 61).

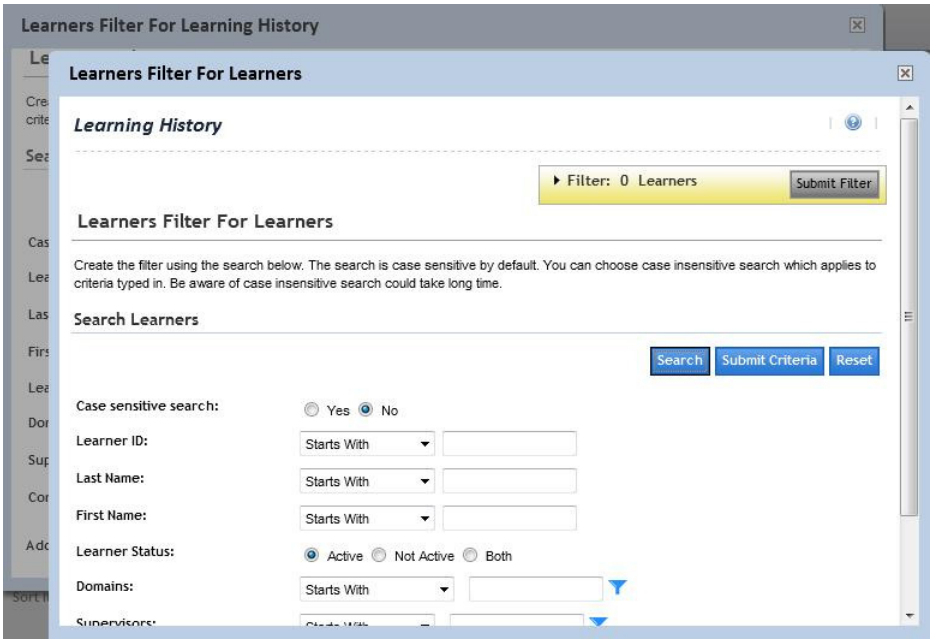


Figure 61: Create Filter Screen

7. If you don't know the supervisor's Learner ID, enter search criteria in the **Last Name** and **First Name** textboxes.
8. Click **Search**.

Your search results are displayed (Figure 62).

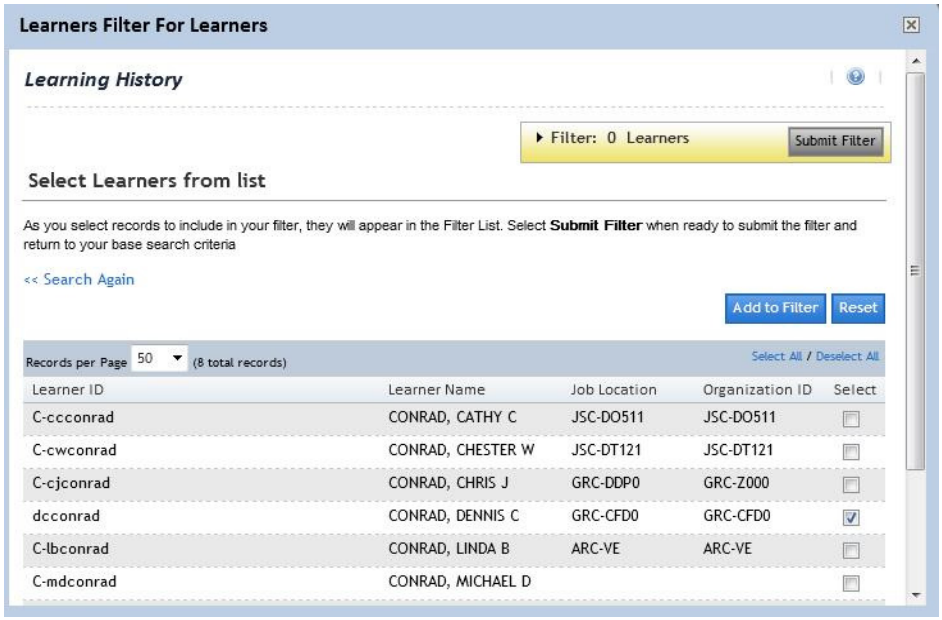


Figure 62: Search Results

9. Click the checkbox(es) to select your choice(s).

10. Click **Add to Filter**.

The criteria are added to the filter (Figure 63).

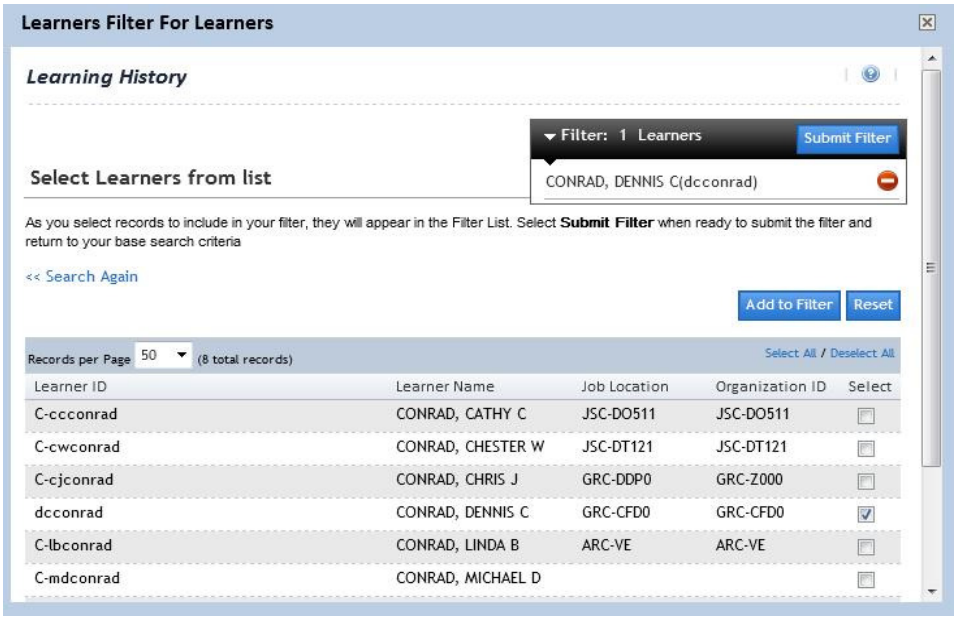


Figure 63: Criteria added to filter

11. Click **Submit Filter**. (Now located at the top of the add filter page.)

You are returned to your original search screen. The supervisor search attribute has one (1) criteria selected for this filter (Figure 64).

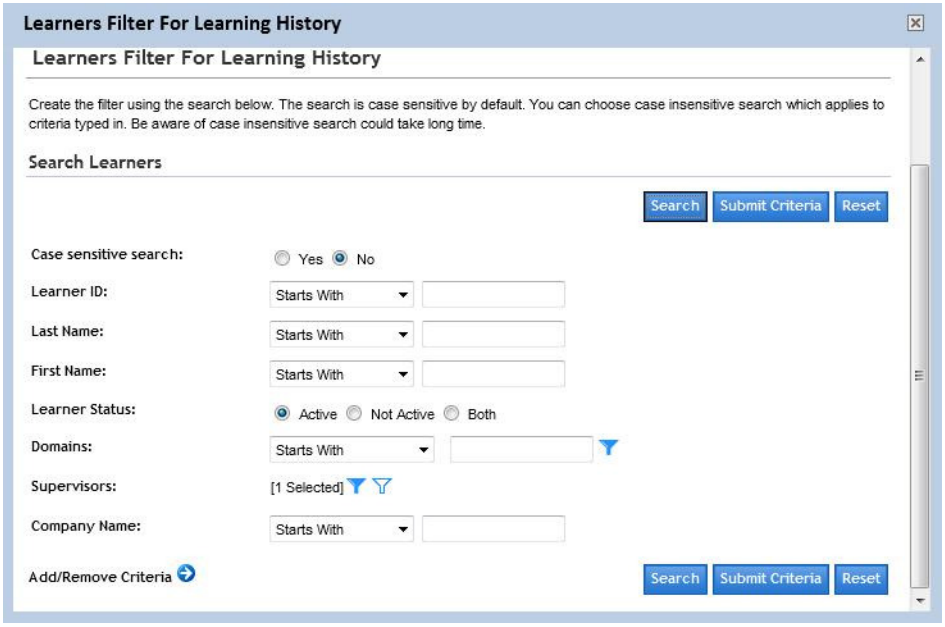


Figure 64: Search Filter Criteria Selection

12. You can modify this filter by clicking the **Filter by criteria icon** ( ), or you can clear the filter by clicking the **Clear Filter icon** ( ).

13. Click **Submit Criteria** to submit Dennis Conrad as criteria making the search dynamic.

You are returned to the original report screen, with a supervisor submitted as criteria (Figure 65). Now, if the subordinate assignment changes, the system automatically updates the search filter of this report, and runs a Learning History report on all Learners who report to Dennis Conrad at the time the report is ran, especially if the report is saved or scheduled to recur.

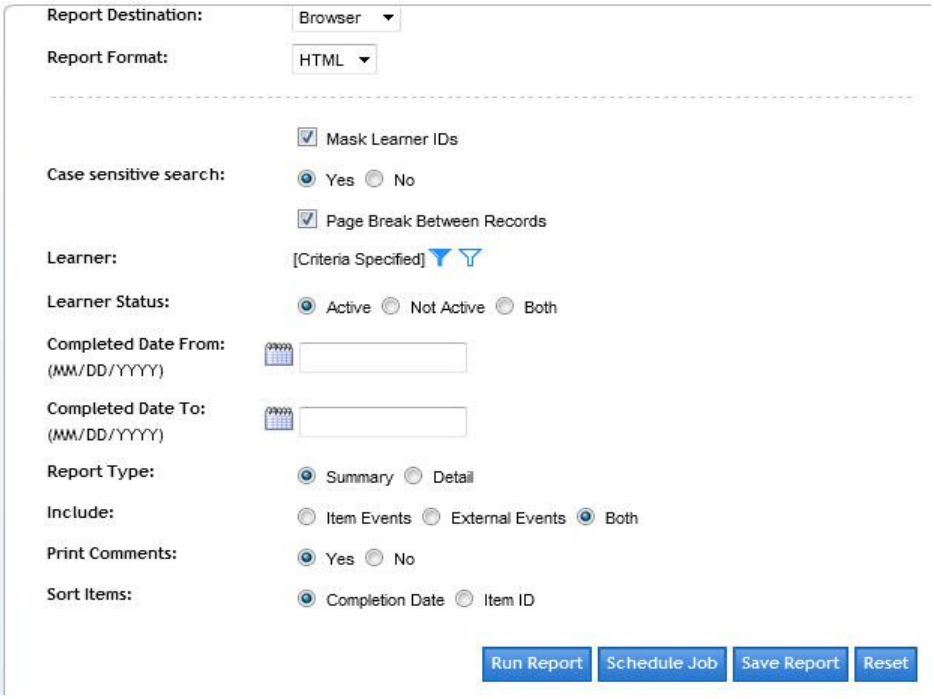


Figure 65: Report Criteria Specified

RUNNING REPORTS IN SATERN LEARNING

Once logged into SATERN Learning, navigate to the Reports menu then select the Reports tab. Access the report you wish to run by clicking the report title. You should notice that the titles of reports are links. Each report is different based on the data it is requesting, and returns different data elements.

To run a report:

1. Find the report you want to run. Use the **Search** textbox to look for reports by title or description, or browse the reports in the provided list. Select the proper category to narrow your search results. Read the provided report descriptions to verify it is the report you want to run.

2. If the report is a member of a report group (reports that run the same query but whose results are grouped differently), click the **Expand icon** (⊞) to the left of the report title to expand the group and see the reports that are part of the group.
3. When you find the report that you wish to run, click its title to open the Run Report form.
4. Complete the Run Report form to provide the report with the information that it needs to return the data you wish to display.
5. After formatting and criteria options have been determined, click **Run Report** to run the report immediately in the format you choose. If you selected **Browser**, the report displays in a separate browser window. If **Local File** was selected, you must first save the file to a local drive before you are able to open it.
6. Administrators need to be aware that if you leave all filtering options blank, you could overburden the system. If the admin leaves all criteria blank, the admin receives a warning message (Figure 66), informing the admin that it may be better to schedule the non-filtered report to be run in the background or return the admin to the filter screen to apply one or more filters to the report.

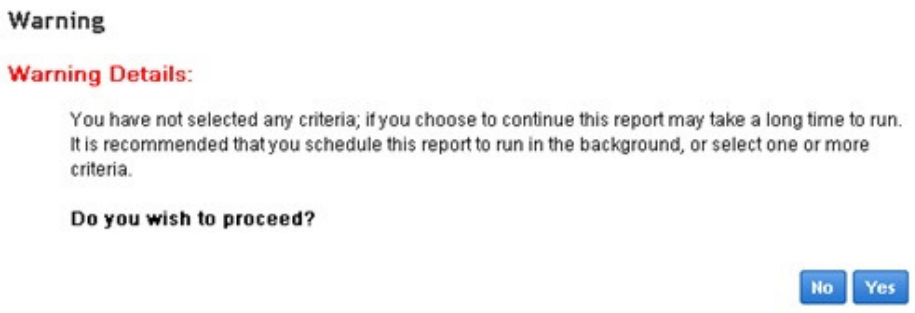


Figure 66: Warning Details

7. Depending on your account settings as an admin, you may not see all of the following buttons (Figure 67). Click:

- **Run Report** to run the report immediately.
- **Save Report** to save the report to be run later at any desired time.
- **Schedule Job** to schedule the report to run in one of three ways: as a background job to be run immediately, once at a future time, or on a recurring basis.

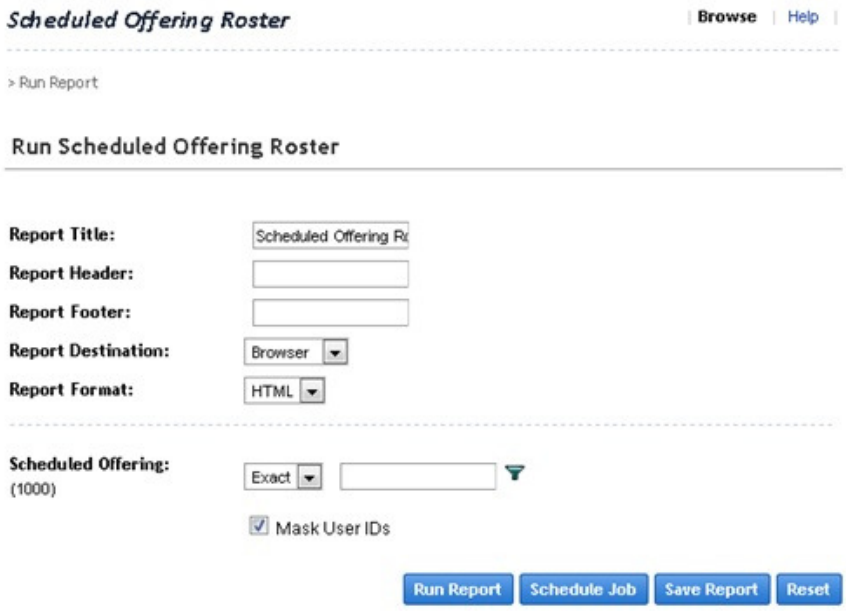


Figure 67: Report Parameters

EXAMPLES OF COMMONLY RUN REPORTS

Some of the most commonly run reports in SATERN include:

- Class Roster report
- Learning History report

This section provides the details on how to run these two reports.

Class Roster Report

One report that many admins run is the Class Roster report. The Class Roster report returns: scheduled offering details including item

title, segment dates/times, instructor, location, and Learners with confirmed enrollments.

To run the Class Roster report:

1. Navigate to **Reports**.
2. Enter **Roster** in the Search textbox.
3. Check the **Miscellaneous** category checkbox (Figure 68).

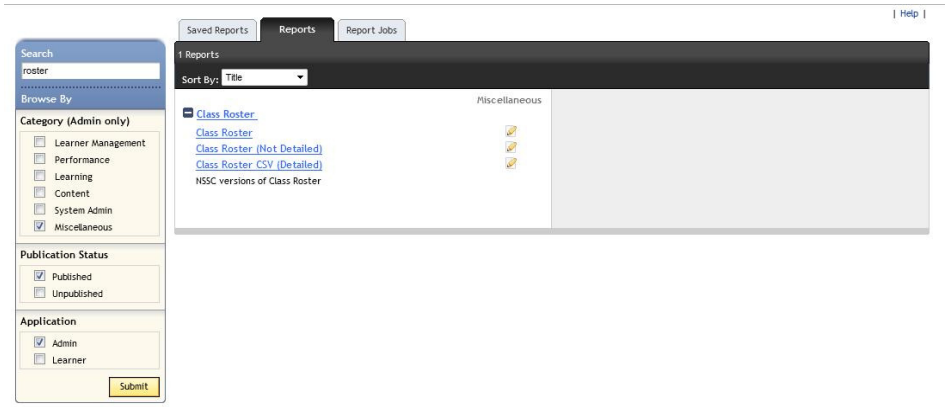


Figure 68: Reports Tab

4. Click **Submit**.
5. Click the report title link (i.e., click **Scheduled Offering Roster**).

The Run Reports screen displays (Figure 69).

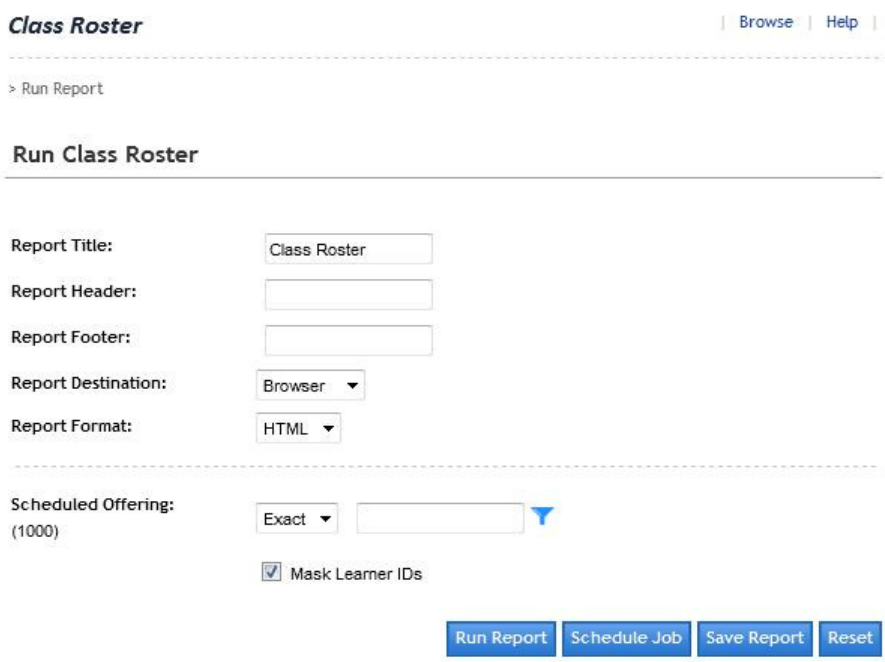


Figure 69: Class Roster Run Report Screen

6. Enter the title of the Class Roster report in the Report Title textbox.
7. Make the desired changes to the formatting section (report header, footer, destination, and format).
8. Click the scheduled offering **Create Filter icon** ( ).
9. Search for or enter the scheduled offering ID to search for the scheduled offering to run the report for.
10. Click **Run Report**.

The Class Roster report displays (Figure 70).

Schedule

Scheduled Offering ID	53742
Title	SATERN IDP TRAINING
Item	COURSE GRC-4C0382 (Rev 4/7/2008 08:47 AM EST)

Segment	Start Date/Time	End Date/Time	Instructor	Location
1 Morning	4/14/2011 07:30 AM EST	4/14/2011 10:30 AM EST	CONRAD, DENNIS C	GRC-Building 142-Room 160C

Learner Name		Email Address	Phone	Loc-Org	Supervisor		Signature	Date
*********	BAUMAN, BENJAMIN T	noemail@nasa.gov	(216) 433-3704	GRC-BRE0	*********	POLANSKY, BETH A		
*********	GOLIAT, STANLEY	noemail@nasa.gov	(216) 433-6259	GRC-FTD0	*********	KELLY, REGINA B		
*********	HE, ZHUOHUI J	noemail@nasa.gov	7048306249	GRC-RTB0	*********	LEE, CHI-MING		
*********	HIRT, STEFANIE M	noemail@nasa.gov	(216) 433-6782	GRC-RTE0	*********	LONG-DAVIS, MARY J		
*********	YOHE, THOMAS M	noemail@nasa.gov	(216) 433-8960	GRC-FD00	*********	LAUDERDALE, DALLAS		

Apr 18, 2012 4:03 PM

Figure 70: Class Roster Report

Learning History Report

A need for most organizations is the ability to run reports on the items that Learners have completed successfully or made unsuccessful attempts at completing. The Learning History report returns the learning events for each Learner recorded during the date range specified in the filtering options. The report can be sorted by completion date or by item ID. You can choose to run a detailed or summary report as well as display item events, external events, or both. If the date range is not specified, the report contains all learning events recorded for the selected Learners regardless of the date.

***Note**: SATERN strongly recommends entering a date range when running this report as to not impact system performance.*

To run the Learning History report:

1. Navigate to **Reports**.
2. Enter **History** in the Search textbox.
3. Check the **Learner Management** category checkbox (Figure 71).

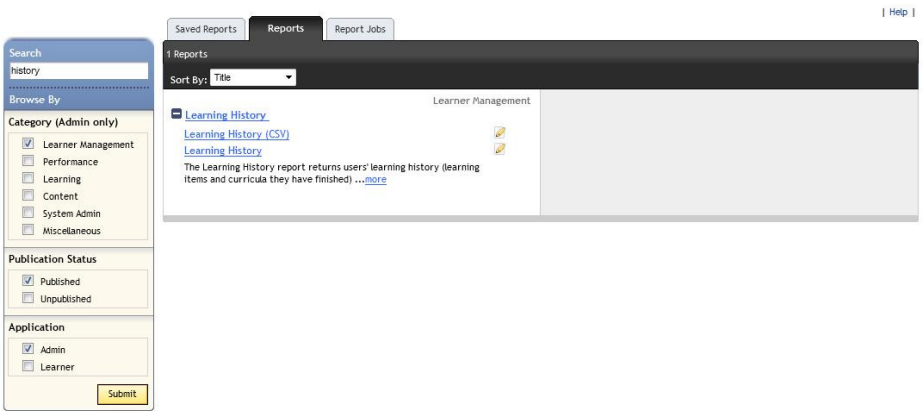


Figure 71: Reports Tab

4. Click **Submit**.

5. Click the report title link (i.e., click **Learning History**).

The Learning History Run Report screen displays (Figure 72).

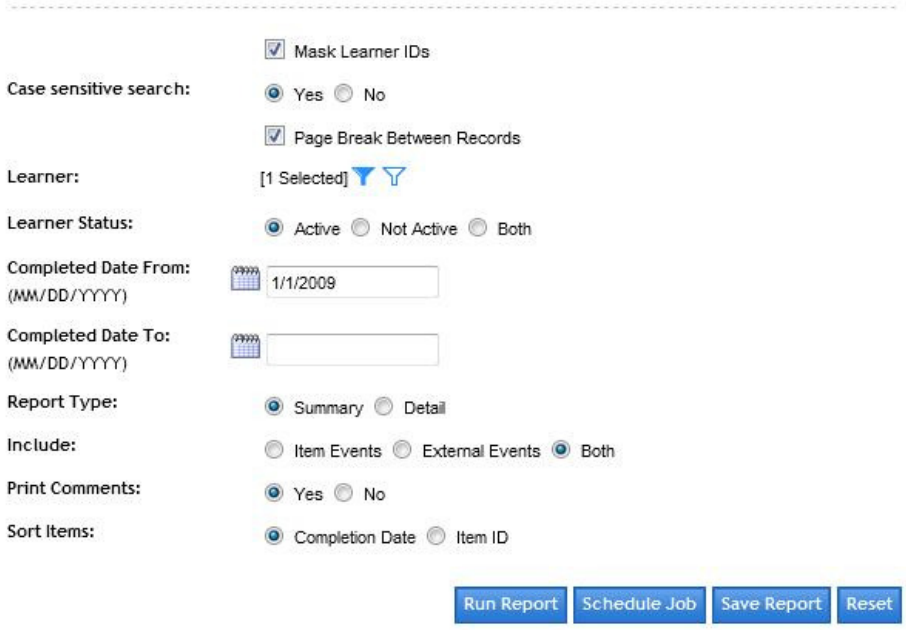


Figure 72: Learning History Run Report Screen

6. Enter the title of the Learning History report in the Report Title textbox.

7. Make the desired changes to the formatting section (report header, footer, destination, and format).
8. You can select the Learners from a list by clicking the **Create Filter icon** ( ) to filter the search or by entering the ID into the Learner ID textbox.
9. Click **Submit Filter** to return to the Learning History Run Report screen. (Now located at the top right of the **Add to filter** page.)
10. Specify completion date range as desired for the report. Notice in Figure 83, the date range has been configured to display only the events that the Learners participated in after January 1, 2009.
11. Select the **Summary** or **Detail** radio button to determine the amount of detail displayed on the report.
12. Select the radio button to specify the event type to include in the report: **Item Events**, **External Events**, or **Both** item and external events.
13. In the Print Comments section, specify whether you want to include comments that were entered for the Learner when the learning event was recorded.
14. Specify the field by which you want to sort the entries in the report: sort by **Completion Date** or **Item ID** (Figure 72).
15. Click **Run Report** to generate the report (Figure 73).

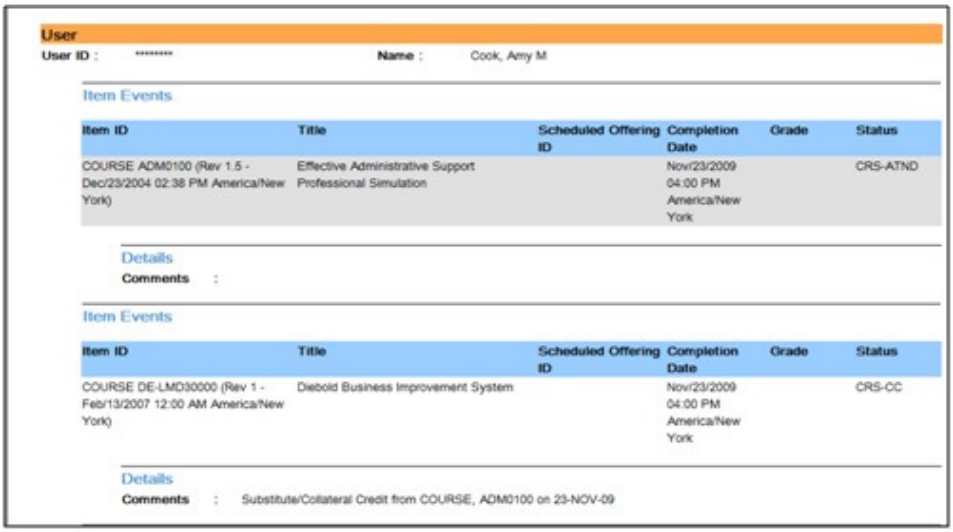


Figure 73: Learning History Report

CREATING SAVED REPORTS

Saving a report is similar to saving a search. SATERN Learning prompts for a saved report ID and description when the Saved Report button is clicked. Saved reports are only available to the admin who created it (Figure 74).

Figure 74: Reports: Saving a Report

When you save a report, you save the report parameters you enter on the Run Report page; therefore, it may be beneficial to submit criteria as filter options. Saved reports are stored on the Saved Reports tab of the Reports interface. To run a saved report, navigate

to the Saved Reports tab, locate the report you wish to run, and then click the **Run** ( ) button (Figure 75).

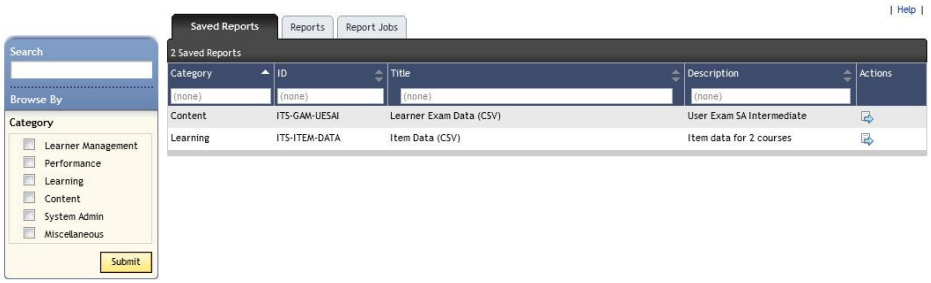


Figure 75: Saved Reports Tab

To sort the saved reports, click the ascending or descending buttons in the column headings. To filter the saved reports list, enter the filtering text in the textbox in the column headings.

To remove a saved report, click the **Run** ( ) button and then click Remove at the bottom of the Report screen (Figure 76).

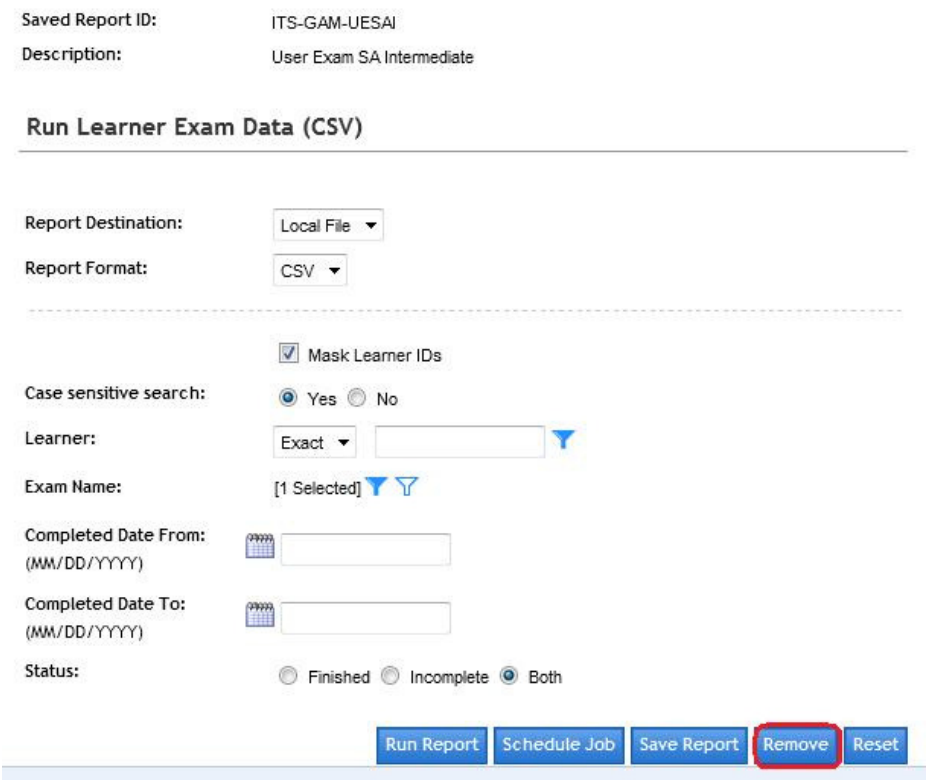


Figure 76: Removing a Saved Report

CREATE RECURRING REPORTS

Any report can be scheduled to run one time in the future or recur on a daily, weekly, or monthly interval. Scheduling a report can be especially useful in the following conditions:

- You want to run a report that will return a large volume of records: by scheduling the report to run once at a later time during low usage, you reduce the report's strain on the system.
- You need to run a report periodically: this can easily be achieved by scheduling the report to run on a recurring basis

On the Run Report screen, schedule a report by clicking the **Schedule Job** button (Figure 77).

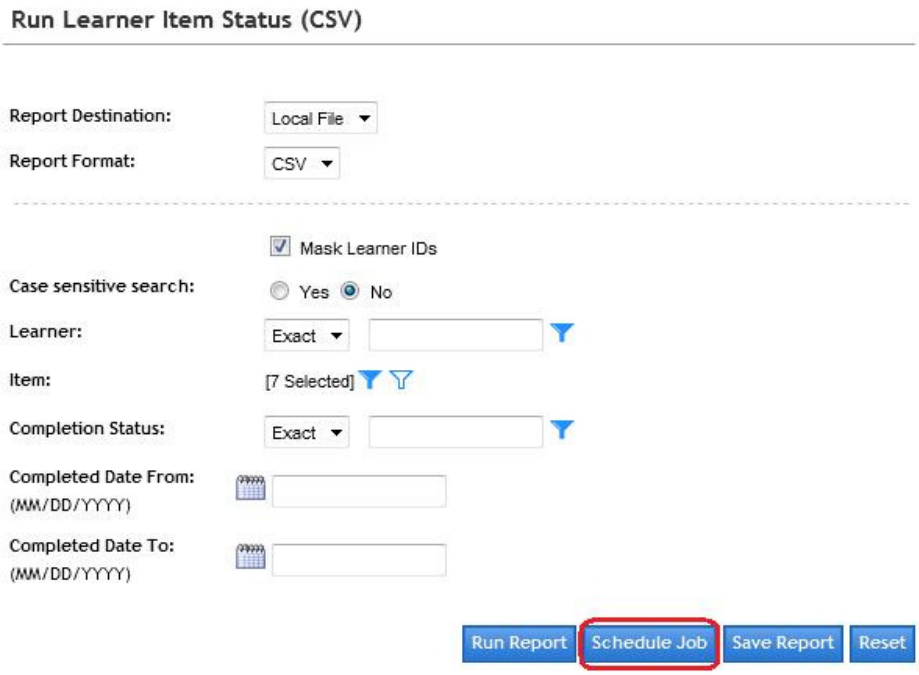


Figure 77: Reports: Schedule Job

Once the Schedule Job button is clicked, you see the following scheduling options:

- Run the job immediately: This is the same as clicking the **Run Report** button on the previous page
- Schedule the job to be ran once in the future
- Schedule the job to recur: daily, weekly, or monthly (Figure 78)

To be notified by email that the report has run, check the **Notify via email upon completion** checkbox and specify an email address. If you would like the report to be sent to you or another recipient through email, specify an email address and check the **Email the Report** checkbox. The report can also be downloaded once the report has run from the Report Jobs tab of the report interface. Remember, reports that are only scheduled to run once displays under **System Admin > Background Jobs**.

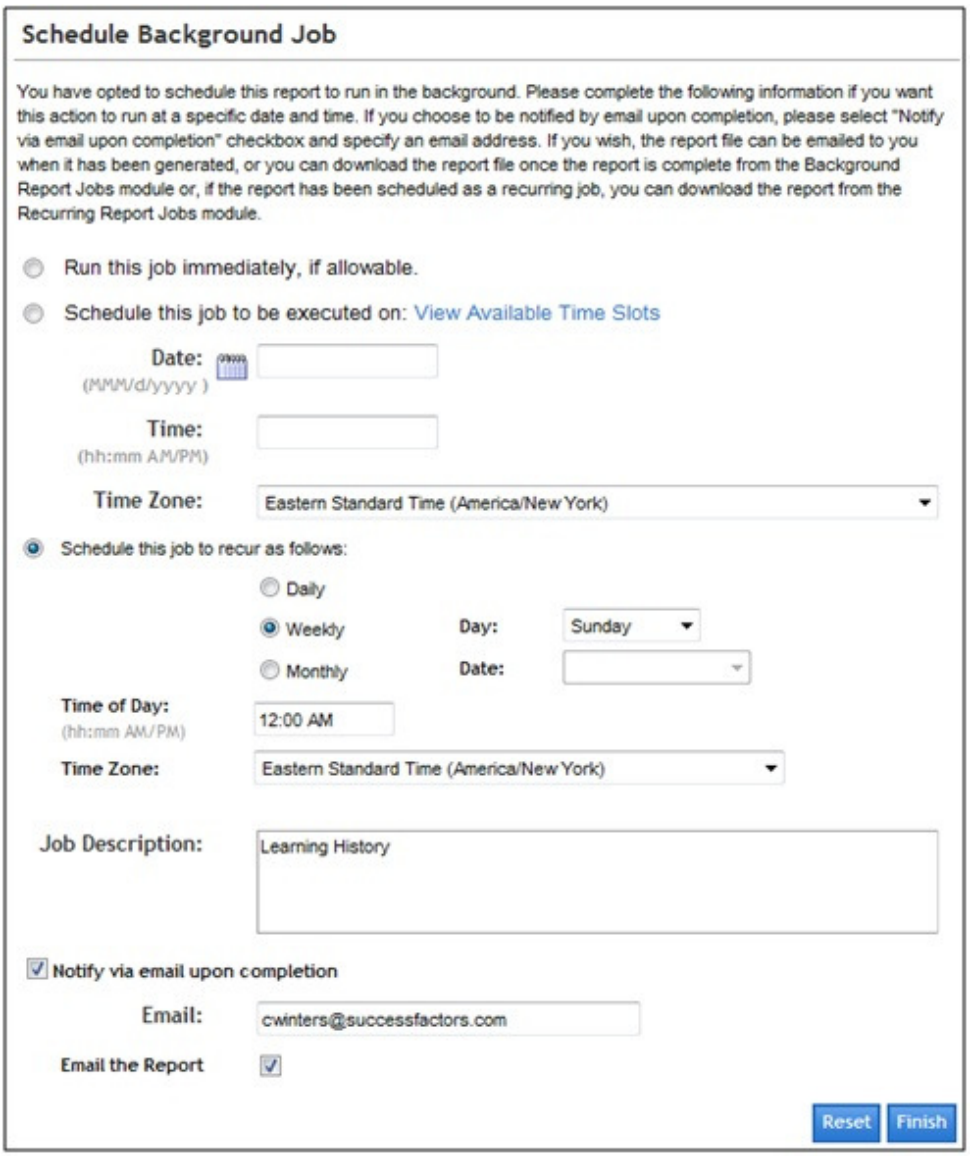


Figure 78: Scheduling Background Report Options

In this example (Figure 78), the report runs every Sunday at 12 AM, EST and sends a copy of the reports to Chase Winters.

Admins can only schedule reports to run during predetermined available time slots. Click the **View Available Time Slots** link to display the list of allowed days, dates, and times (Figure 79).

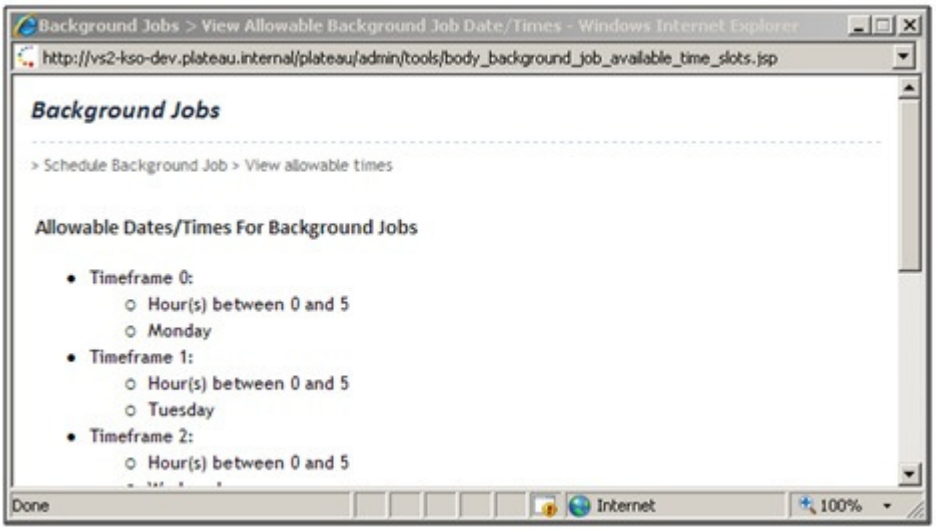


Figure 79: Reports: View Available Time Slots Link

CONCLUSION

SATERN Learning offers many different reporting options. Admins can specify format, report file type, and viewing destination. Reports can be saved, scheduled on a recurring basis, and emailed. Finally, filters are saved using the **Submit Criteria** button to dynamically update search criteria for saved and recurring reports.

LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. Create a learning plan report that filters on a supervisor.
2. Save the report.
3. Run the report and verify the results.
4. Add another subordinate to the supervisor.
5. Run the report again.
6. Did the report reflect the changes you made? Why or why not?

7. True or false:

Administrators can share saved reports with one another.

Activity

You need to know who did not complete a particular curriculum. Your boss wants you to report this information to her every Monday morning at 8 AM. Set up the solution in SATERN.

Job Aid: Run Reports: Basic Tasks

Job Aid: Run Reports: Advanced Tasks

NOTES