SATERN

System for Administration, Training, and Educational Resources for NASA

National Aeronautics and Space Administration

NASA

Learning Needs Management

Classroom Guide

(Version 6.4)

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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Lesson 1: ITEMS

The goal for this lesson is to provide detailed information about items and how to add and work with them in SATERN.

OBJECTIVES

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

- Describe the parts of the item key
- Describe the four item classifications
- Describe the main sections of an item record
- Add an instructor-led item using the provided step-by-step instructions

ITEM MAIN CONCEPTS

An item is an assignable unit that can be tracked in SATERN. It may be a learning or non-learning activity.

Items are usually thought of as “courses”; however, they can be much more. Examples of non-course items include:

- Reading a standard operating procedure (SOP)
- Obtaining an annual physical

ADDING AN ITEM

When creating a new item, use the **Add New Learning Item** wizard to enter key data. Required fields are indicated with a red asterisk (*). Required fields for items are configurable for each instance of SATERN. When you complete the creation process and submit the data, the entered information displays in various sections and links of the item record.

Item Key

First, an item key needs to be established. The item key is the unique identifier in the database and is made up of three parts:

- **Item type (reference):** This is a globally defined reference that helps categorize items. When administrators create a new item, you must choose from the defined list. Subsequently, each "type" has an associated "completion status." This is an admin-defined reference used when recording a learning event.
- **Item ID:** This is a unique identifier for each item within the SATERN Learning database. It is recommended that a standard ID naming convention be applied to items and all records in the system.
  - NASA Business Rule
    - IDs start with the Center or Discipline acronym followed by a hyphen (-) followed by all upper case alpha or numeric characters to briefly identify the item. For example:
      - KSC-BOOK-ATR – A TEAM OF RIIVALS: THE POLITICAL GENIUS OF ABRAHAM LINCOLN
      - JSC-DA-TAWS – TEAM ACCELERATOR WORKSHOP
      - GRC-MEA-AS – AEROSPACE SYMPOSIUM

- **Revision date/time stamp:** The system will default to the current date/time and version 1. The admin can manually override the data in these fields as needed. This field uniquely identifies when the item has been revised.

Some examples of item keys include:

- WORKSHOP JSC-DA-TAWS 07/01/2004 10:15 AM EST
- BOOK KSC-BOOK-ATR 07/03/2004 12:22 PM CST

Activity

Create an item key for items that you will create in the upcoming lab:

Lab 1. Adding a New Item

Step

1. Navigate to **Learning** > **Items**.
2. Click **Add New**.

***Note**: You can also enter Add Item into the Search field below the button bar and click Go.*

3. Click to select the item type, **Scheduled Only**. The plus sign changes to a checkmark.
4. Click **OK**.
5. Select an item type from the drop-down menu.
6. Enter an item ID.
7. Enter the item title. (NASA Business Rule: All letters entered in all upper case).
8. Enter a description for the item.
9. Select a domain for the item.
10. Uncheck the **Approval required** checkbox (if it is currently checked).
11. If there is an entry in the **Approval Process** field, click on the drop-down menu, scroll to the very top of the list and select the blank entry.
12. Enter the number of hours into contact hours, credit hours, and or CPEs. (You may need to scroll down using the inner window's scrollbar on the right.)

Note: This field should allow for 2 decimal places to be entered

13. In the **Schedule Template** section, select **2** from the **Number of days** drop-down menu.

14. Enter **8** in the **Hours per day** field (if not already defaulted).

15. Click **Save & Exit**.

Note: The classification of the item should read "Instructor-Led".

MAIN AREAS OF AN ITEM RECORD

The item record is divided into three main areas (Figure 1):

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

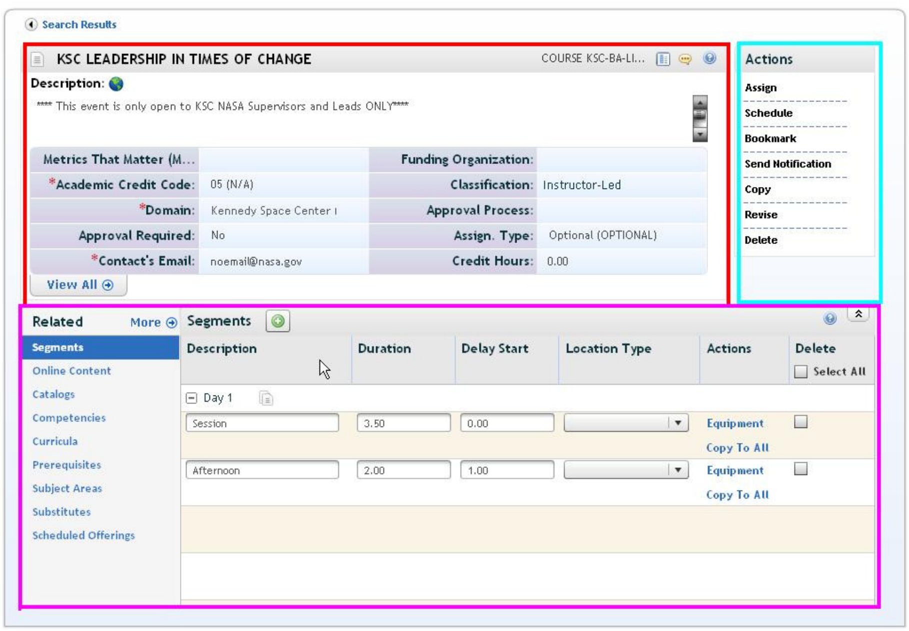


Figure 1: Item Record

Core Area

The core area contains the basic information of the item record, including the item title, item key, description, summary section, and expands to show the Extended Summary section, Design and

Process Control. All fields that have a red asterisk (*) are required. Click on the View All button located at the bottom left of the core area, as some of the required fields are located in this Extended Summary area. 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).

Lab 2. Adding Information to an Item's Core Area

Step

1. Using the item created in Lab 1, click on the View All tab.
2. In the **Summary** section:
   a) Click the **Metrics That Matter (MTM)** field and select **N** (NO) from the drop down menu
   b) Click the **Funding Organization** field and enter the organization information.
   c) Click the **Academic Credit Code** field and select **05** (N/A) from the drop down menu
   d) Click on the **Domain field** search box and select the correct domain
   e) Leave the Approval Process field blank
   f) Click the **Approval Required** field and select **No** from the drop down menu
   g) Click the **Assign Type** field and select **Required** (REQUIRED) from the drop-down menu.
   h) Click on the **Contact's Email** field and enter the POCs email address
3. In the **Extended Summary** section:
   a) Click the **Active** field and select **YES** from the drop down menu
   b) Click the **Source** field and select **Internal** (INTERNAL) from the drop down menu

c) Click the **Max Registration** field and enter a default number of maximum learners that should be enrolled when the item gets scheduled.

d) Click the **Min Registration** field and enter a default number of minimum learners that should be enrolled when the item gets scheduled.

e) Click the **Self Registration** field and select **Yes** from the drop-down menu (if not already selected by default).

f) Click the **Type of Training Sub-Code** field and select **01-05 (Human Resources)** from the drop-down menu.

g) Click the **Source of Training** field and select 03 **(Non-government)** from the drop-down menu.

h) Click the **Training Credit Type Code** field and select **04 (Not Applicable)** from the drop-down menu.

i) Click the **Direct Cost Code** field and select **C (Contract – Funded by Center)** from the drop-down menu.

j) Click the **Indirect Cost Code** field and select **0 (No Direct Cost)** from the drop-down menu.

k) Click on the **P/PM RE-CERTIFICATION** field and select **N (NO)** from the drop-down menu.

4. In the **Design** section:

a) Click the **Initial Basis** field and select **Event**.

b) Click the **Initial Period** field and select **Days**.

c) Click the **Initial Number** field and enter **30**.

Note*: This will give learners who are assigned this item 30 days to complete it from the assignment date. This topic is covered in more detail in Lesson 3 of this guide.*

5. In the **Process Control** section:

a) Click the **Enable Learner Requests** field and select **Yes** (if not already selected by default).

b) Click the **Supervisors can record Learning Event** field and select **No** (if not already selected by default).

c) Click the **Learners can record Learning Event** field and select **No** (if not already selected by default).

6. Click **Save**

Related Area

The Related area of the item record contains additional information regarding the item (Figure 2).

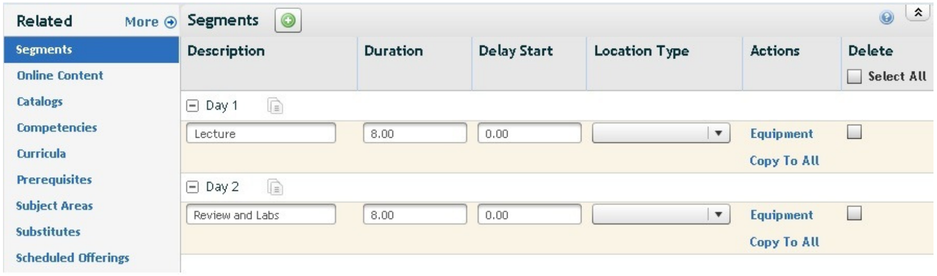


Figure 2: Related Area of Item Record: Segments

The Related tab defaults to display the Segments. Select the Related tab on the left (i.e., Segments) to display the details on the right. Click **More** to see additional Related tabs.

Table 1 provides a list of and descriptions for each Related tab.

Table 1: Related Area Options and Descriptions: Item Record

Option	Description
Segments	Default time blocks used when creating scheduled offerings.
Online Content	Create and update the content structure of the item.
Catalogs	Associate items to catalogs; determines which learners have access to the item for self-assignment or self-enrollment.

Competencies	Associate the competencies related to the item and set the required rating that is achieved when completing the item.
Curricula	View which curricula contain the item.
Prerequisites	List which item or items are required to be completed before a learner can self-enroll or launch the selected item.
Subject Areas	List the subject areas assciated with the item.
Substitutes	Associate which item or items a learner can complete and also get credit for the item.
Scheduled Offerings	View future scheduled offerings of the item.
Available under More →	
Evaluations	Associate Learner Satisafaction, Mastery of Content, and Application of Learning evaluations.
Instructors	Associate and view the instructors authorized to teach the item.
Notifications	View/modify the Learning Expiration notification settings and view/modify the registraion email templates.
Objectives	Associate objectives associated to the item.
Requests	View/add learner requests for the item.
Profit centers	View the purchasing options and the account codes that act as the default profit center if a learner's account is charged for the training.
Cost Calculation	Identify the default overhead costs for creating, delivering, and maintaining the item.
Documents	Associate documents that learners can launch from the item details page (not tracked).
Grading Options	View/modify the required field when a learning event is recorded.
Materials	Associate materials related to the item.
Pricing	Set the default published price of the item.
Request Reasons	Set the reasons that a learner can select from when making an item request.
Tasks	Associate the tasks related to the item.

Working with Segments

The **Segments** tab of the item contains the default segments added when the item was created. A segment is a block of time within a scheduled offering (scheduled session of an item). The defaults are used to build out the actual training schedule when the item is scheduled in SATERN. At the item level, the admins can indicate the day, duration, delay start (of a segment), location type, and equipment needed for each segment. Once a scheduled offering of the item is created, a specific start date, start time, instructor, training location, and specific equipment can be indicated for each segment.

If new default segments need to be added to an existing item, click the **Add New Segments** icon to add the new segments. Existing segments can also be modified if needed.

Lab 3. Working with Item Default Segments

Step

1. Select the **Segments** tab in the Related area.
2. In the Segments section:
   a) Enter a description for each existing segment.
   b) Change the duration of segment 2 to 4 hours.
   c) Click **Save**.
3. Click to add a new segment and enter the following:
   a) Day: **3**
   b) Description: **Final Review**
   c) Duration: **4 (hours)**
4. Click **Save**.
5. Click to add another new segment and enter the following:
   a) Day: **3**
   b) Description: **Final Exam**
   c) Duration: **1 (hours)**
   d) Delay Start: **0.5 (hours)**.

This will create a 30 minute break between the two segments on Day 3.

6. Click **Save**

Job Aid: Edit Instructor-Led Items

ADDING CATALOG INFORMATION

A catalog is used to make items (and scheduled offerings of the items), not assigned by administrators or supervisors, available (viewable) to learners. Access to a catalog is provided through an assignment profile. Learners may have access to more than one catalog, although from a learner's perspective, they only see one list of available items. An item may reside in multiple catalogs.

In order for a learner to self-assign an item or self-register for a scheduled offering of an item, the item must reside in a catalog to which he/she has access (Figure 3).

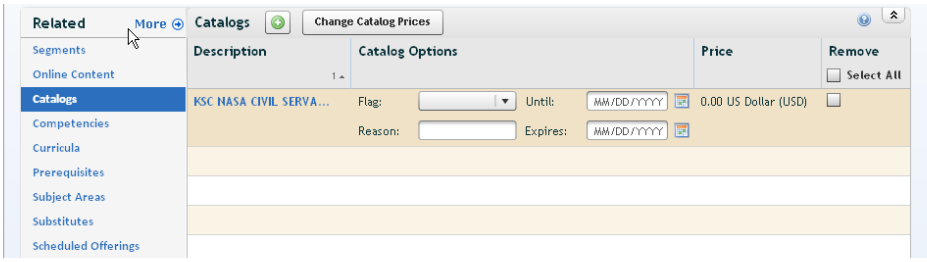


Figure 3: Related Area of Item Record: Catalogs

An admin can flag an item in a catalog as new, featured, or revised until a given date. If flagged, the item displays on the bottom section of a learner's home page. An admin can also set an expiration date which determines when the item will be removed from a particular catalog (also requires an APM). This does not inactivate the item, but does ensure that it is not part of a particular catalog after the set expiration date. This feature does not remove the item from a learner's Learning Plan.

Lab 4. Adding an Item to a Catalog

Step

1. Using the item created in Lab 1, select the **Catalogs** tab in the Related area.
2. Click the **Add New Catalogs** icon.
3. Enter the keyword, **KSC**, and click **Search**.
4. Click the **Add** checkbox next to the KSC_CATALOG catalog.

__Note__: The Add Schedules checkbox should be checked if you also want to add all existing scheduled offerings to this catalog.

5. Click **Add**.
6. Verify that all selected catalogs are displayed.
7. Click the **Flag** drop-down menu.
8. Select **New** from the drop-down menu of the display options
9. Click the **Until** calendar icon.
10. Select the last date to display the flag.
11. In the **Reason** field, enter why this item is flagged (learner viewable).
12. Enter an expiration date (if desired).

__Note__: This date determines when the item is to be automatically removed from the catalog. It is removed by the purged expired catalog APM.

13. Click **Save**.

Job Aid: Edit Instructor-Led Items

ADDING SUBJECT AREAS TO AN ITEM

Learners have the ability to browse catalog/s by subject area. An item can be associated with one or more subject areas. If an item has a subject area and is available to a learner through the catalog, the subject areas display on the Browse Catalog page.

Figure 4: Related Area of Item Record: Subject Areas

Lab 5. Adding Subject Areas to an Item

Step

1. Using the item created in Lab 1, select the **Subject Areas** tab in the Related area.
2. Click the **Add New Subject Areas** icon.
3. Enter the keyword information. For this lab, enter **Information Technology**.
4.

__Note__: If a list of subject areas is displayed before conducting a search, the Keyword field can be found by scrolling to the top of the screen

4. Click **Search**.
5. Check the **Add** checkbox next to Information Technology.
6. Click **Add**.

Job Aid: Edit Instructor-Led Items

ACTIONS AREA

The Actions area of the item record contains links to additional actions that can be taken on the item record, including (Figure 5):

- Assign (initiates the Learner Needs Management tool to enable you to batch assign items and curricula to one or more learners)
- Schedule (create a scheduled offering of the item)
- Bookmark (add the item to the admin bookmarks)
- Send Notification (initiates the ad hoc notification wizard)
- Copy (opens the Copy Item window that allows you to copy the item)
- Revise (initiates the revision wizard)
- Delete (deletes the item)

Figure 5: Actions Area of Item Record

Note: These actions are covered in future lessons and scheduling is covered in the Scheduling Management course.

LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- Item Data - The Item Data report returns attributes of learning items.
- Item List - The Item List report, given learning items, returns the items' type/ID/revision code and title.

CONCLUSION

In Lesson 1, you were introduced to the main sections of item record and the information contained in each. Step-by-step instructions were provided and you created a new item and entered key information.

You should now be able to:

- Describe the item key
- Describe the item classifications
- Describe the main sections of an item record
- Add and edit an item using the provided step-by-step instructions

In the next lesson, you will learn how to use items to build curricula.

LESSON CHECK

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

1. List the three parts of the item key:

a.

b.

c.

2. List and describe the four types of item classification:

a.

b.

c.

d.

3. Your manager has given you the following task:

- Create a new item "Communicating Effectively" that will be scheduled for two 4-hour days.
- Inform learners what topics are covered in the course.
- Learners should receive 8 credit hours upon successful completion of this item.

Using the information from this lesson and SATERN Learning (online help), perform the task assigned by your manager.

NOTES

Lesson 2: Curricula

The goal for this lesson is to provide detailed information about curricula, including how to add and work with them in SATERN.

OBJECTIVES

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

- Describe the benefits of using curricula
- Describe the characteristics of curricula
- Create a curriculum using the provided step-by-step instructions
- Modify item defaults within curricula
- Set up subcurricula

CURRICULUM MAIN CONCEPTS

A curriculum is a grouping of one or more items for the purpose of assigning and tracking as a single entity. Curricula provide the functionality to recalculate required by dates on items that have been completed but must be repeated on a recurring basis.

Characteristics of Curricula

General characteristics of curricula include:

- Items can be used in one or multiple curricula with different date and requirement settings in each.
- Modifications made to a curriculum have an immediate impact on all learners who have the curriculum currently assigned.
- Curricula can be linked to a job position or assignment profile and automatically assigned when a learner is given that job position or meets the profile attributes.
- Curriculum can contain requirements (covered in the Learning Extras section of this guide):
  - # of Hours
  - # of Hours from an Item Pool
  - # of Items from an Item Pool

Curriculum Status

Curricula can have one of two statuses:

- Complete
- Incomplete

The *Complete* status is achieved when any of the following occur:

- All required items in the curriculum have been successfully completed and recorded
- The effective date (defined later in this lesson) of each item is in the future
- Some of the required items are complete and the remaining required items have an effective date in the future

- The requirements have been met as described on the Requirements link (see the Learning Extras section for more information)

The *Incomplete* status is in effect when any of the following occur:

- A new curriculum is assigned to a learner and the effective date for any required items is in the past
- Any required item has not been successfully completed and recorded
- A completed item's retraining interval date has passed
- The curriculum is modified with a new or revised item, and the effective date is not set for a future date
- The requirements have not been met as described on the Requirements link (see Learning Extras section for more information)

Curriculum ID

The Curriculum ID is a unique identifier in the SATERN database. The ID can be anything; however, it is strongly recommended that an enterprise-wide naming convention for curricula be established. This will help administrators when searching, assigning, or running reports for curricula.

Some sample curriculum IDs include:

- SMA-STEP-LEVEL1-V2.0
- SSC-EMS
- KSC-MISHAPCUR

Lab 6. Add a New Curriculum

Step

1. Navigate to Learning > Curricula.
2. Click **Add New**.
3.

Note: You can also enter Add Curriculum into the Search field below the button bar and click Go.

3. Enter a curriculum ID.
4. Enter a title for the curriculum.
5. Enter a description of the curriculum, if desired.
6. Leave the creation date set to the default.
7. Select a domain.
8. Leave the **Force Incomplete** checkbox unchecked.

Note*: When you select the Force Incomplete checkbox, the system calculates whether the status should be complete or incomplete based on the learner's latest attempt at completing the item. If the learner's latest attempt is incomplete, the system calculates the expiration and required dates based on the date and time of the last unsuccessful attempt.*

9. Click Add.

Job Aid: Manage Curricula

MAIN AREAS OF CURRICULUM RECORD

Once a curriculum record is added to SATERN, it is organized into three main areas (Figure 6):

- Core (red outline)
- Related (yellow outline)
- Actions (green outline)

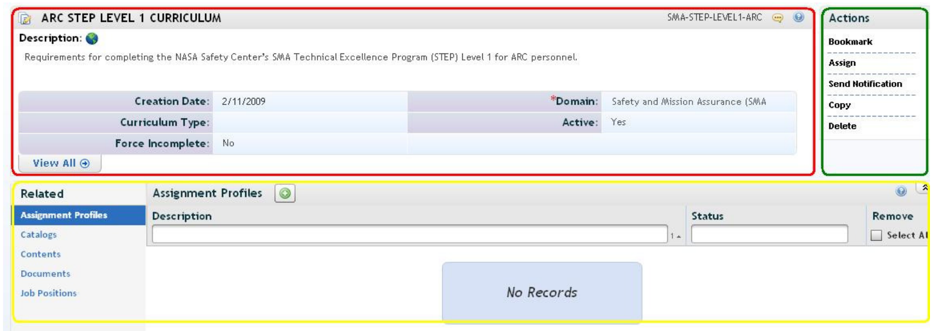


Figure 6: Curriculum Record

Core Area

The core area contains the basic curriculum record information, including curriculum title, ID, description, and type (which NASA does not use). To edit a 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 enter additional information by clicking  located at the bottom left of the Core area. Once expanded, the screen displays the following sections where updates can be made:

- Title
- Description
- Summary

- Extended Summary (used by regulated organizations for CFR21 Part 11)

Table 2 lists and describes the fields for a curriculum record, and whether the field displays to the learner.

Table 2: Curriculum Record: Fields and Descriptions

Field	Description	Displays to Learner
Title	Name of curriculum displays to the learner on the Curriculum Status screen. Can be in multiple languages.	X
Description	Provides informational details on the curriculum. Can be in multiple languages.	X
Creation Date	Indicates the date the curriculum was created.	
Domain*	Identifies administrative ownership of the record.	
Active	This checkbox indicates whether the curriculum is active or inactive in the database.	
Force Incomplete	This checkbox calculates whether the status of the curriculum should be complete or incomplete based on a learner's latest attempt at completing any required item assigned to the curriculum.	

Related Area

The Related area of the curriculum record contains additional information regarding the curriculum (Figure 7).

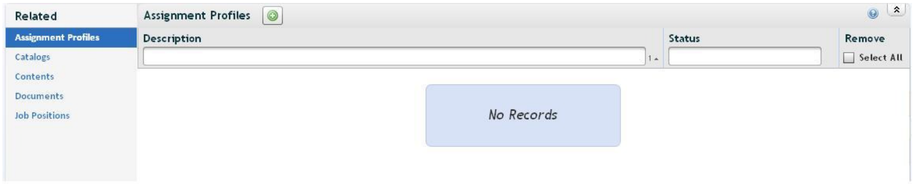


Figure 7: Related Area of Curriculum Record

Select the Related tab on the left (i.e., Assignment Profiles) to display the details on the right.

Table 3 provides a list of and descriptions for each Related tab of the curriculum record.

Table 3: Related Area Options and Descriptions: Curriculum Record

Section	Description
Assignment Profiles	View/modify the assignment profiles that push the curriculum out to a target learner population.
Catalogs	Associate catalogs to the curriculum that determines which learners have access to the curriculum (and items) for self-assignment.
Contents	Associate items, requirements and subcurricula to the curriculum.
Documents	Associate related documents to the curriculum.
Job Positions	View the job positions to which the curriculum is tied.

Associating Contents

The Contents tab in the Related area (Figure 8) is used to view, associate, and edit one or more of the following to the curriculum:

- Items
- Requirements
- Subcurricula

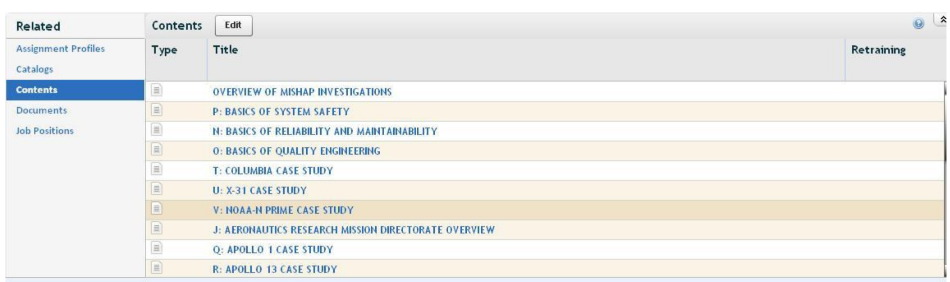


Figure 8: Related Area of Curriculum Record: Contents

As you add content, the system places the new content at the bottom of the list; however, you can later adjust the visual sequencing of the content by clicking the Edit button and then the **Move Up** ( ) or **Move Down** ( ) buttons (Figure 9).

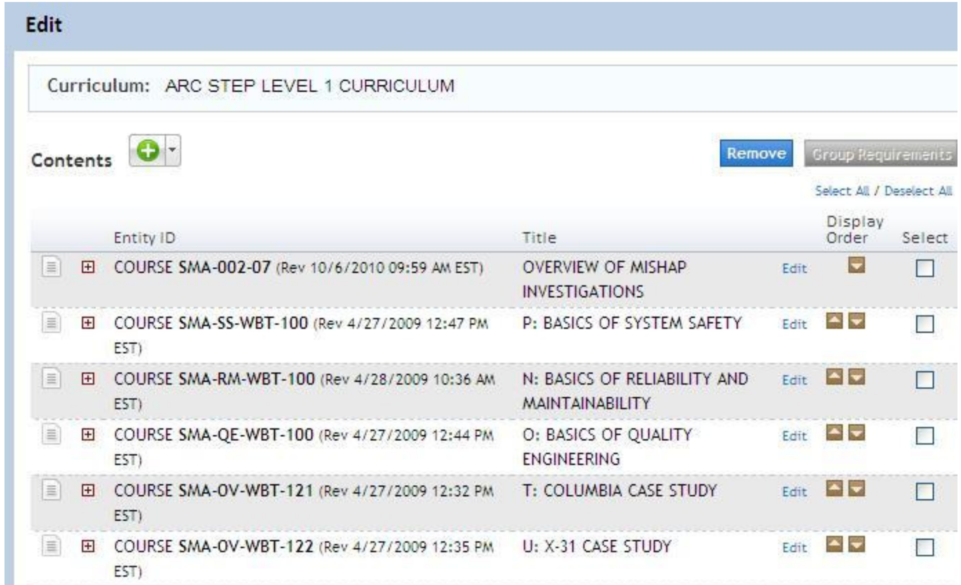


Figure 9: Edit Curriculum Window

By adjusting the visual sequencing, the display of information is impacted when learners view the curriculum details in the learner interface. It does not affect the due dates or sequence of due dates. This visual sequencing can be used as a way to suggest to learners which piece of content they should complete first when two or more pieces of content are due on the same day. For each piece of content associated with a curriculum, you can click the **Expand** button ( ) to view the assignments (for the item or requirement) or the items of the curricula.

Items

There is no limit to the number of items that may be added to a curriculum. In the Edit Curriculum window (i.e., click the **Edit** button in the Related area of the curriculum record), click the **Edit** link for each item to modify (Figure 10):

- **Initial Assignment** (covered in Lesson 3): The amount of time a learner has to initially complete the item.

- **Retraining Assignment** (covered in Lesson 3): The amount of time a learner has to retake and complete the item once he/she successfully completes the item.
- **Basis Date** (covered in Lesson 3): Defines the beginning point of the time-periods. The time-periods themselves are built using either the initial assignment information, or the retraining assignment information. Once the item is completed, it is not due again until the end of the next period. Using the basis date system, you can assign learning that is due once a quarter, or once a year, but permit the learner to complete it at any time during the quarter or year.
- **Effective Date:** The date when the item has an impact on the overall curriculum status.

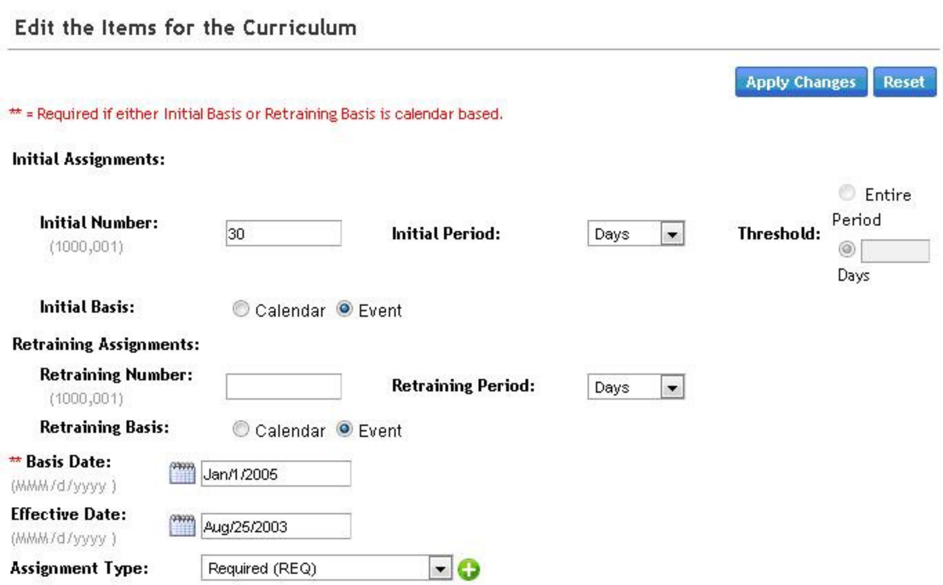


Figure 10: Edit Items for Curriculum Window

Lab 7. Associating Items to Curriculum

Step

1. Access the curriculum created in Lab 6.
2. Select the **Contents** tab in the Related area.
3. Click **Edit**.
4. Click the **Add Content** button ().
5. Select **Items** from the drop-down menu.
6. Enter criteria in the keyword field to search for the items to include in the curriculum.
7. Click **Search**.
8. Check the **Add** checkbox next to each item to add to the curriculum.
9. Click **Add**. The selected item(s) is added to the contents list.
10. Click the **Edit** link next to the last listed item:
    a) Enter initial assignments (number and period).
    b) Select an initial basis (event).
    c) **Do not** enter retraining assignments.
    d) Enter a basis date (if not defaulted) and an effective date (use the current date).
    e) Select an assignment type. Select **Required (REQ)**.
11. Click **Apply Changes**.
12. Click the **Move Up** ( ) arrow and **Move Down** ( ) arrow to sequence the curriculum content. This sets the suggested order display for learner.

13. Click the **X** to close the Edit window and return to the curriculum record.

Job Aid: Manage Curricula

Requirements

Requirement-based assignments of curricula give you the flexibility to create and assign multiple requirements (# of hours, # of hours from an item pool, # of items from an item pool) that are used in evaluating the status of a learner's assigned curriculum. Requirement-based curricula use different requirement types; you can create the set of conditions by which you want the system to evaluate the learner's curricula.

Note*: This topic is covered in more detail in the "Learning Extras: Requirements-Based Curricula" section.*

Subcurriculum

The Subcurricula option is used to create a hierarchical structure between two or more curricula (Figure 11).

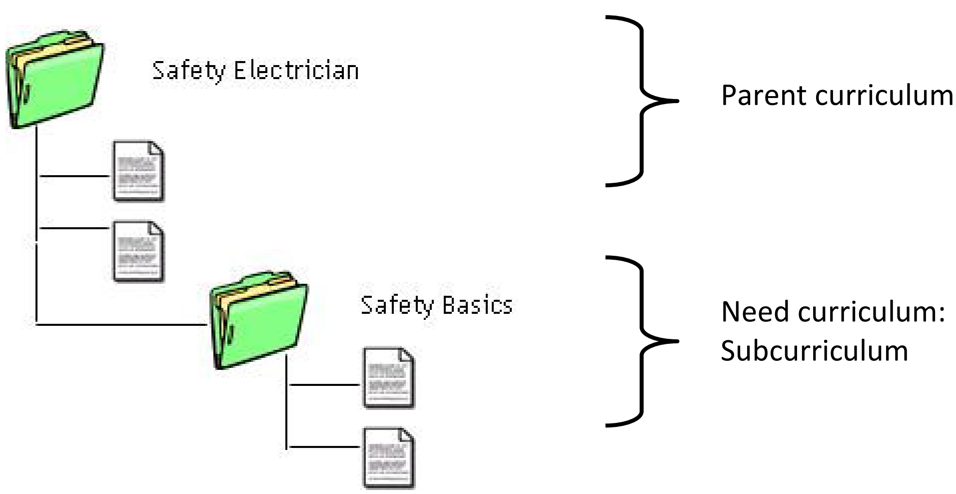


Figure 11: Hierarchy of Curriculum and Subcurriculum

When the curriculum designated as the parent (main) is assigned to a learner, all items in the parent curriculum and nested (subcurricula) curricula are added to the learner's Learning Plan. The main curriculum is Incomplete until all required items in the subcurricula are complete. Therefore, the learner must complete all required items and/or requirements within all curricula to achieve a status of Complete in the parent curriculum. Each subcurricula status can be tracked and reported on individually.

If, at any time, an item contained in a nested curriculum gets revised or goes past its required-by date, the parent curriculum, along with the curriculum that contains the overdue/revised item, will change to a status of *Incomplete*.

Lab 8. Creating a Curriculum Hierarchy (Subcurriculum)

Step

1. Using the curriculum created in Lab 6, select the **Contents** tab in the Related area.
2. Click **Edit**.
3. Click the **Add Content** button ( ).
4. Select Subcurricula from the drop-down menu.
5. Enter criteria in the keyword field to search for the curriculum to add as the subcurricula.
6. Click **Search**.
7. Check the Add checkbox next to each curriculum to add as the subcurricula.
8. Click **Add**. The subcurricula is added to the bottom of the contents list.

Job Aid: Manage Curricula

Adding Curriculum to Catalogs

The Catalogs tab in the Related area of the curriculum record (Figure 12) is used to add the curriculum to one or more catalogs. Doing so allows learners to self-assign the curriculum and all its items. Supervisors can also assign curricula that they can view in their catalogs to their employees.

Figure 12: Related Area of Curriculum Record: Catalogs

Note*: If a learner self-assigns a curriculum, the learner is held to the timeframes and assignment types set by the administrator for the curriculum. This differs from self-assignment of an individual item when the timeframe and assignment types are ignored by SATERN.*

Lab 9. Add Curriculum to a Catalog

Step

1. Using the curriculum created in Lab 6, select the **Catalogs** tab in the Related area.
2. Click the **Add New Catalogs** button ( ).
3. Enter keyword: **NASA** and click **Search**.
4. Check the Add checkbox next to the NASA catalog.

> ***Note***: *The Add Items checkbox should be checked if you also want to add all items contained in the curriculum to this catalog.*

5. Click **Add**.
6. Verify that the selected catalog is displayed.
7. Click the **Flag** drop-down menu.
8. Select **New** from the drop-down menu.
9. Click the **Until** calendar icon.
10. Select the last date to display the flag.

> ***Note***: *This date determines when the curriculum is to be automatically removed from the catalog. It is removed by the purged expired catalog APM.*

11. In the **Reason** field, enter why this curriculum is flagged (learner viewable).
12. Click **Save**.

Job Aid: Catalog Management

Actions Area

The Actions area of the curriculum record contains links to additional actions that can be taken on the curriculum record, including:

- Bookmark (add the item to the admin bookmarks)
- Assign (initiates the batch assignment wizard)
- Send Notification (initiates the ad hoc notification wizard)
- Copy
- Delete

Figure 13: Actions Area of Curriculum Record

LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- Curriculum Data

The Curriculum Data Report returns curricula attributes; including the subcurricula in the curriculum.

CONCLUSION

In this lesson, you were introduced to key curriculum concepts. The main tabs of the curriculum and the information contained on each were covered. Step-by-step instructions were provided for adding a new curriculum, associating items to the curriculum, modifying item defaults within the curriculum, and adding subcurricula to a parent curriculum.

You should now be able to:

- Describe the benefits of using curricula
- Describe the characteristics of curricula
- Create a curriculum using the provided step-by-step instructions
- Modify item defaults within curricula
- Set up subcurricula

LESSON CHECK

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

1. When an item is added to a curriculum, which of the following cannot be edited?
   a) Required Type
   b) Effective Date
   c) Initial Period
   d) Item ID

2. True or false:

When an item within a curriculum has a status of Required, an effective date must be entered.

3. True or false:

An item can be used in multiple curricula.

4. True or false:

For a curriculum status to be Complete, all items in the curriculum must be complete.

5. If an item in a subcurriculum is past it's required by date, what happens to the parent curriculum?
    a) Has no effect on the overall curriculum
    b) The subcurriculum status changes to incomplete
    c) The curriculum status changes to incomplete
    d) B & C only
    e) All of the above

NOTES

Lesson 3: Period-Based Curricula

The goal for this lesson is to provide detailed information about initial and retraining assignments within in a curriculum and how to work with them in SATERN.

OBJECTIVES

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

- Set up a period-based curriculum
- Explain the differences between initial basis: event and initial basis: calendar
- Predict the required date of an item based on the period specifications

PERIOD-BASED CURRICULUM

After an admin groups items into a curriculum, the following questions need to be answered:

- How much initial completion time should be granted to the learner?
- Does an item within a curriculum have a firm required-by date for all learners regardless of when it is assigned?
- Do the items within the curriculum require retraining?

When a learner needs to complete an item on a recurring basis, it must be in a curriculum and have a retraining period.

In review of characteristics of a curriculum, each item in a curriculum has the following settings (Figure 14):

- Initial assignment
- Retraining assignment
- Basis date
- Effective date
- Assignment type

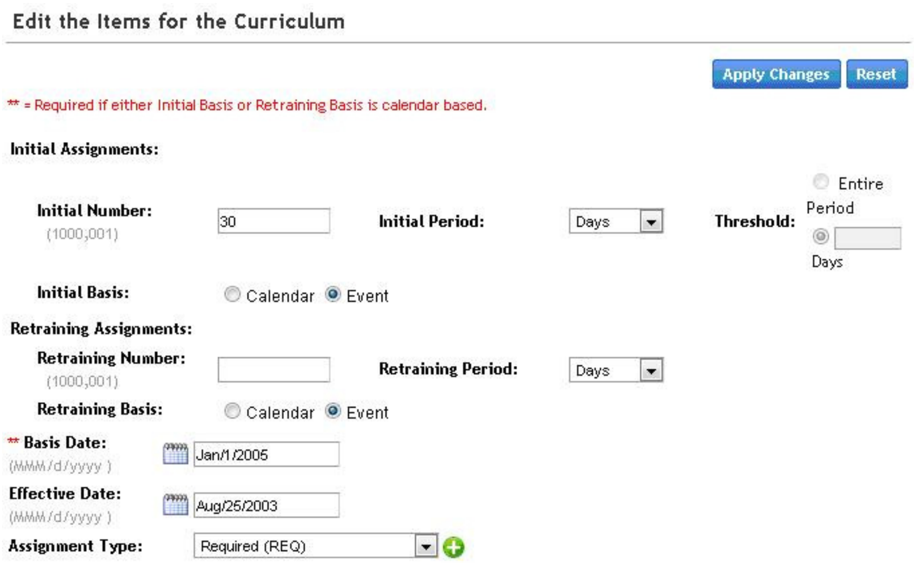


Figure 14: Edit Item Settings within a Curriculum Record

Event vs. Calendar Basis

Admins have two options available when setting initial and retraining assignment, initial basis: event and calendar.

Initial basis: event uses the assignment date of the curriculum (item) to determine the original required by date (initial assignment) and the Learning History (Completed Work) completion date to determine the next required by date (retaining assignment).

Initial basis: calendar uses a basis date which is set within the item details of a curriculum. This allows administrators to set a fixed required-by date for initial assignments and intervals for retraining periods.

Basis: Event

Using *basis: event*, SATERN calculates the required date by completing the current period and then adding the initial/retraining assignment. The trigger for initial basis: event is the assignment date (initial assignment) and the retrain basis: event is the Learning History (Completed Work) completion date (retraining assignment). Using the days, weeks, months, quarters, or years periods, SATERN does not start counting until the current day, week, month, quarter, or year ends. Therefore, learners receive the rest of the current period plus all of the specified period.

For example, a learner is assigned an item with an initial assignment of 30 days, initial basis: event, and an assignment date of 10/16/2011. SATERN calculates a required by date of 11/16/2011. It completes the current day period 10/16, then counts 30 days. Using the same dates but setting an initial assignment of one month, SATERN generates a required by date of 11/30/2011. It completes the current month period, October, then counts one month.

Finally, using the same dates but changing the initial assignment to one year, SATERN calculates a required by date of 12/31/2012. It completes the current year period, 2011, then counts one year.

Basis: Calendar

Calendar basis, for retraining periods, allows admins to create different intervals using the basis date. This prompts the system to start its date calculations from that basis date instead of January 1st. This can be useful for training that is due at the end of a fiscal year.

An admin specifies the start of the calendar basis date in the item details within the curriculum. In the following grid, the basis date is 10/01/2011 and has calendar basis 6 month initial period. Therefore, SATERN creates intervals starting on 10/01/2011, each running for six months.

Interval 1	October 2011	November 2011	December 2011
	January 2012	February 2012	March 2012
Interval 2	April 2012	May 2012	June 2012
	July 2012	August 2012	September 2012
Interval 3	October 2012	November 2012	December 2012
	January 2013	February 2013	March 2013

A learner completes an item on 02/11/2012 with a retraining assignment of six months and the above *retraining basis: calendar*. SATERN generates a new required by date of 09/30/2012. It completes the current calendar period, Interval 1, and then looks for the end of the next interval.

If the completion date is 04/15/2012, SATERN calculates a new required by date of 03/31/2013. It completes the current calendar period, Interval 2, and then looks for the end of the next interval.

For initial assignments, if an administrator uses *initial basis: calendar*, they can set a fixed required by date for all learners regardless of what date the curriculum (item) is assigned.

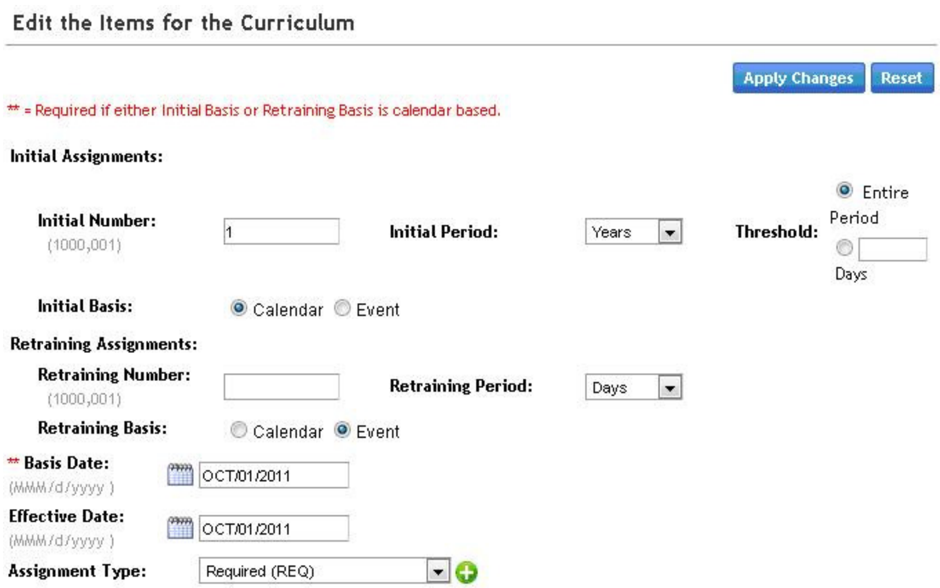


Figure 15: Edit Item Settings within a Curriculum

Using the settings in Figure 15, a learner who has this item assigned through this curriculum between the dates of 10/01/2011 and 09/30/2012 would have a required by date of **09/30/2012**.

If a learner has the item assigned close to the fixed required by date, the admin can configure the item to give learners the rest of the current period plus the next full period. This is accomplished by setting the **threshold days** with the number of days into the period, that when an assignment occurs, it should skip the remainder of the current period and set the required by date to the end of the next full period (Figure 16).

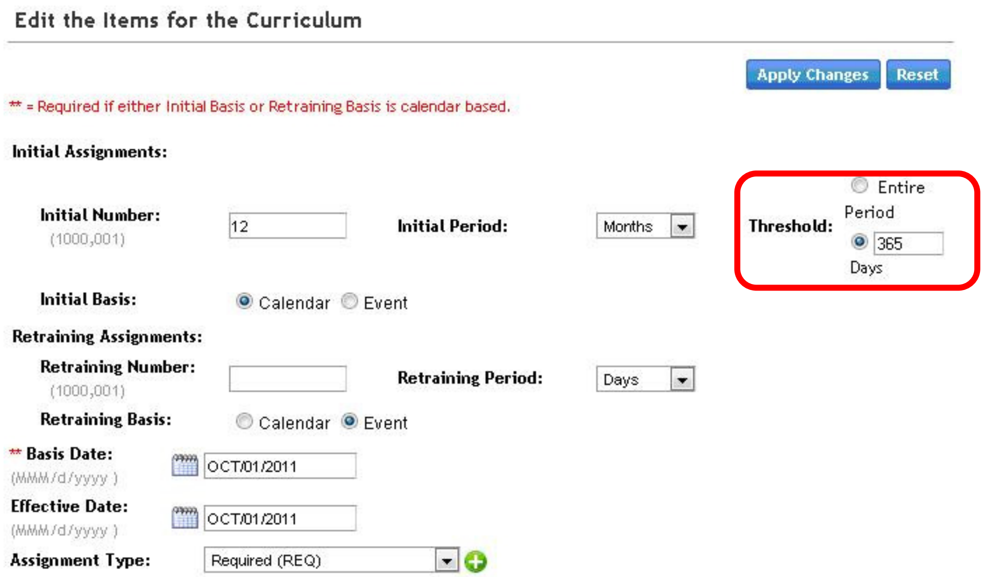


Figure 16: Edit Item Settings within a Curriculum

Using the settings in Figure 16, a learner who has this item assigned through this curriculum between the dates of 10/01/2011 and 08/31/2012 would have a required by date of 09/30/2012.

Learners who have the item assigned between the dates of **09/01/2012** and **09/30/2012** would have a required by date of **09/30/2013**.

Effective Date

The effective date identifies when the curriculum status changes to *Incomplete* if the learner does not complete a required item. This is equivalent to a grace period.

For example, the effective date is set in the future to allow learners who completed the original version of an item time to complete the revised item. Since the effective date is set in the future, the new version will not affect the completion status of the curriculum until it becomes effective. Therefore, the learner's curriculum status does not revert to *Incomplete*. Effective dates only affect *Incomplete* and *Complete* curricula status and does not interfere or change required dates.

Assignment Type

The assignment type is a status assigned to an item that indicates the level of importance to the learner (i.e., Required, Optional, Recommended, etc.). A learner must complete all required items (and any requirements on the **Requirements** link of the curriculum) to obtain a *Complete* curriculum status.

Lab 10. Setting Item Periods within a Curriculum

Step

1. Using the curriculum created in Lab 6, select the **Contents** tab from the **Related** area.
2. Click the **Edit** button (do not click the item title; this will navigate you to the item entity).
3. Locate the item to modify and click the **Edit** link.
4. In the **Initial Assignments** section, enter an initial number.
5. Select an initial period.
6. Select an initial basis.

***Note**: If you select **Calendar** as the initial basis, select a **Threshold (Entire Period or Days)**.*

7. In the **Retraining Assignments** section, enter a retraining number.
8. Select a retraining period.

***Note**: Once a learner completes this item, he/she will be required to complete this item again within the set retraining assignment timeframe*.

9. Select a retraining basis.
10. Enter the desired basis date if using calendar basis for either initial or retraining. If using event basis, accept the default date.
11. Enter an effective date.
12. Select an assignment type.
13. Click **Apply Changes**.

Job Aid: Manage Period-Based Curricula

Lab 11. Setting a Fixed, Initial Required By Date

Step

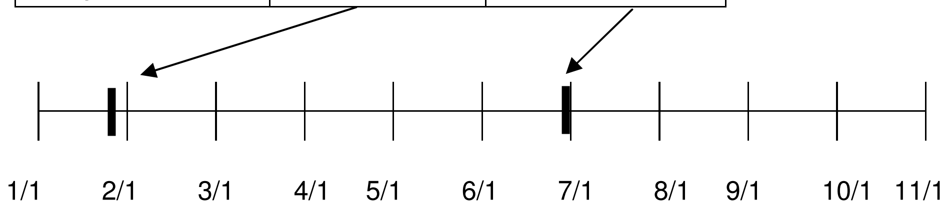
1. Using the curriculum created in Lab 6, select the **Contents** tab from the **Related** area.
2. Click the **Edit** button (do not click the item title; this will navigate you to the item entity).
3. Locate the item to modify and click the **Edit** link.
4. In the **Initial Assignments** section, enter an initial number.
5. Select an initial period.
6. Select the **Calendar** initial basis.
7. Select the **Entire Period** threshold.
8. Enter an effective date.
9. Select an assignment type.
10. Click **Apply Changes**.

Job Aid: Manage Period-Based Curricula

Event and Calendar Basis Activity

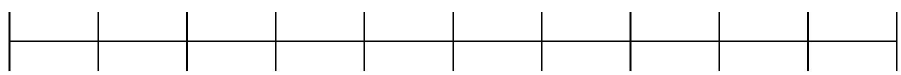
Example item:

Initial basis:	Event	Required Date
Initial period:	Months	06/30/2011
Initial number:	5	
Assignment date:	01/24/2011	



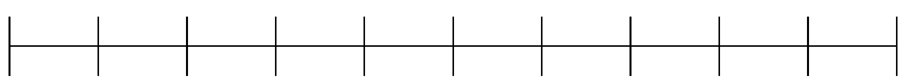
Item A

Initial basis:	Event	Required Date
Initial period:	Years	
Initial number:	2	
Assignment date:	01/24/2011	



Item B

Initial basis:	Calendar	Required Date
Basis date:	10/01/2009	
Initial period:	Months	
Initial number:	5	
Assignment date:	01/24/2011	



Item C

Initial basis:	Event	Required Date
Initial period:	Days	
Initial number:	365	
Assignment date:	01/24/2011	

Item D

Initial basis:	Calendar	Required Date
Basis date:	10/01/2009	
Initial period:	Years	
Initial number:	2	
Assignment date:	01/24/2011	

CONCLUSION

In Lesson 3, you were introduced to the functionality of period based curricula. Using initial basis: calendar or event, an admin specifies the amount of time a learner has to complete an item once assigned as part of a curriculum. If recurring training is necessary, the item must be assigned as part of a curriculum.

You should now be able to:

- Set up a period-based curriculum
- Explain the differences between initial basis: event and calendar
- Predict the required date of item based on the period specifications

LESSON CHECK

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

1. What does the effective date of an item within a curriculum impact?
    a. Required by date
    b. Curriculum status
    c. Both A & B
    d. None of the above

2. What is the major difference between initial basis: event and calendar basis?

3. True or false:

A fixed required by date can be set for an item within a curriculum.

NOTES

Lesson 4: Manual Learning Assignments

The goal for this lesson is to provide detailed information about manually assigning training to learners in SATERN. Now that items and curricula records have been created, you are ready to make the necessary manual learning assignments to your learners.

OBJECTIVES

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

- Assign an item directly to a learner
- Assign a curriculum directly to a learner
- Batch assign an item/curriculum to a group of learners

LEARNING ASSIGNMENT MAIN CONCEPTS

This lesson focuses on the manual methods of assigning learning to learners. Both items and curricula can be assigned through manual assignment methods.

You can make manual learning assignments using:

- Direct assignment of an item to an individual learner
- Direct assignment of a curriculum to an individual learner
- Batch assignments of items and curricula to a group of learners

ASSIGNING AN ITEM USING THE LEARNING PLAN TAB

When you need to assign an item to one learner, the easiest way to accomplish this task is navigating to the Learning Plan tab in the Related area of the learner record (Figure 17). This is called assigning a free-floating item. Free-floating item assignments are a one-time requirement. There are no retraining periods associated with this type of assignment. If a free-floating assignment is made by an admin, the item displays on the learner's Learning Plan (Learning Plan tab in the Related area of the learner record), even if they have previously completed the item (successful Learning History record).

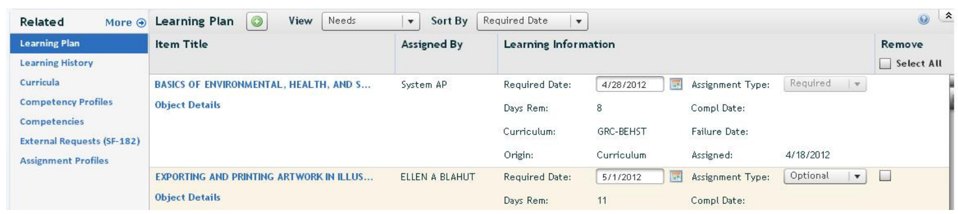


Figure 17: Related Area of Learner Record: Learning Plan

Using **Add New Learning Plan** (), you can search for and add items to the learner's Learning Plan. Once added, you can change the required date and assignment type.

Lab 12. Assigning Items Directly to Learner Record

Step

1. Navigate to **Learners> Learners**.
2. Enter criteria to search for the learner to whom you will assign the item.
3. Click **Search**.
4. Click the learner ID link.
5. Select the **Learning Plan** tab in the **Related** area.
6. Click **Add New Learning Plan** ( ).
7. Enter criteria to search for the item to assign.
8. Click **Search**.
9. Click the **Add** checkbox next to the item(s) to add.
10. Click **Add**.
11. Locate the item in the displayed list.
12. Add/edit the Required Date using the calendar icon.
13. Select an assignment type from the drop-down menu.
14. Click **Save**.

Job Aid: Assign Learning via Basic Methods

ASSIGN A CURRICULUM

When you need to assign a curriculum to one learner, the easiest way to accomplish this task is by navigating to the Curricula tab from the Related area of a learner record (Figure 1).

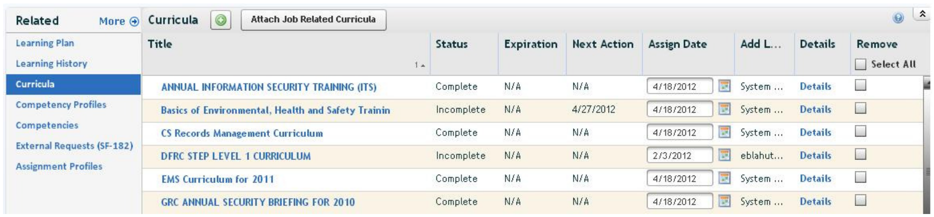


Figure 18: Learner Record: Curricula Tab

Using the **Add New Curricula** button ( ), you can assign a curriculum to the learner. When a curriculum is assigned to a learner, the system checks the learner's Learning History. If any of the items found in the curriculum are also found in the learner's Learning History (as previously completed for credit), the system will flag the item as completed in the new curriculum and will not place the item onto the learner's Learning Plan (unless there is a retraining period). Once the curriculum assignment is made, you can change the required date of the items assigned via the curriculum on the Learning Plan tab.

Lab 13. Assigning Curricula Directly to Learner Record

Step

1. Navigate to **Learners > Learners**.
2. Enter criteria to search for the learner to add the curriculum.
3. Click **Search**.
4. Click the learner ID link.
5. Select the **Curricula** tab from the **Related** area.
6. Click **Add New Curricula** ( ).
7. Enter criteria to search for the curriculum to add.
8. Click **Search**.
9. Click the **Add** checkbox next to the curricula to add.
10. Click **Add**.
11. Verify the curricula are added to the learner record.
12. Select the **Learning Plan** tab from the **Related** area.
13. View the items that are added to the learner's learning plan based on the curricula added.

Job Aid: Assign Learning via Basic Methods

BATCH LEARNING ASSIGNMENTS

If you need to do a one-time manual batch assignment of one or more items or curricula to a group of learners, it is easiest to use the Learner Needs Management tool (Figure 19). Click **Assign Learning Needs** from the **Actions** area.

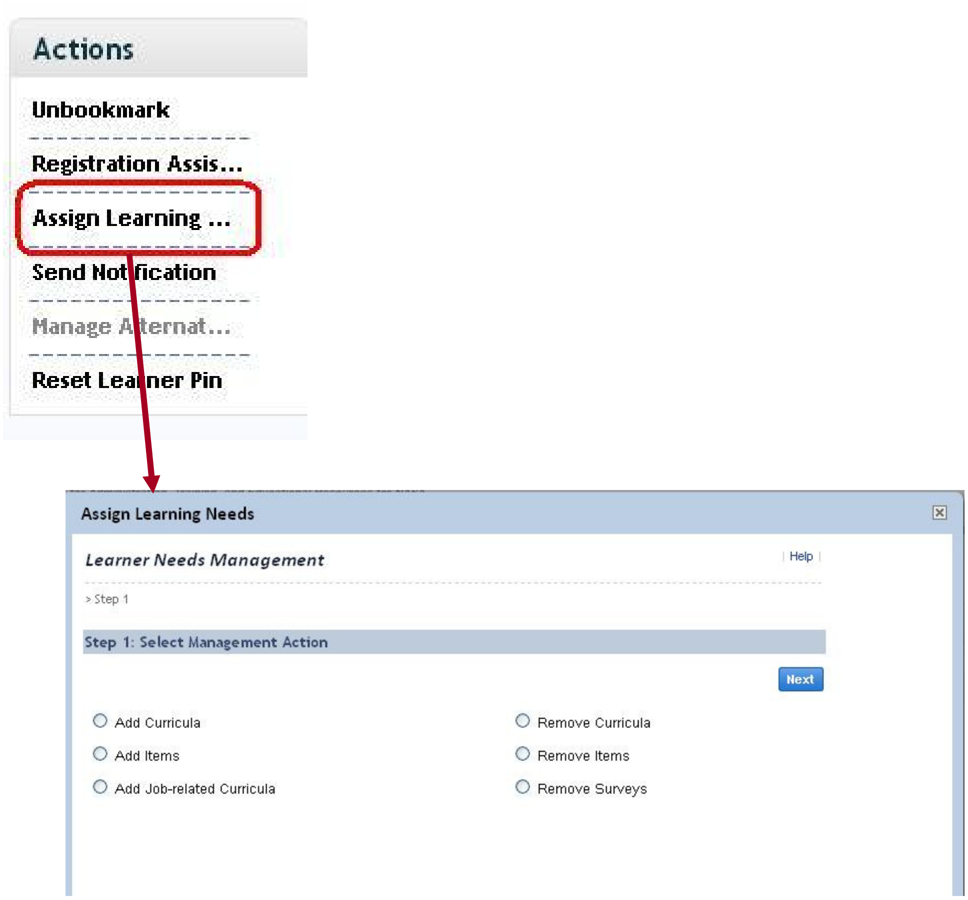


Figure 19: Assign Learning Needs Action Link: Learner Needs Management

You are presented with a wizard containing the step-by-step process to make batch assignments. Using this tool, you have the ability to select multiple learners and assign one or more items or curricula to the selected learners.

The Learner Needs Management tool has full learner search capabilities using the **add one or more from list** link (Figure 20).

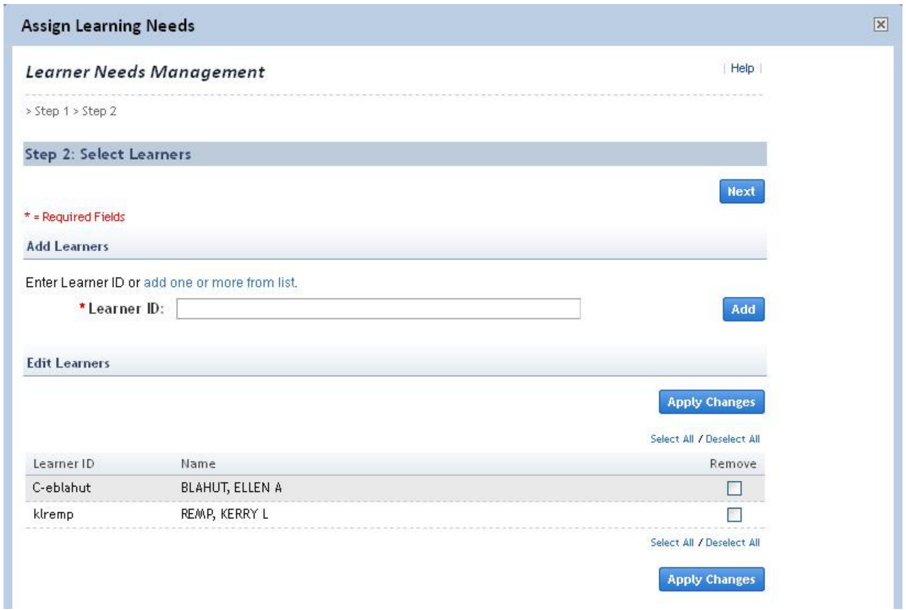


Figure 20: Learner Needs Management: Search for Learners

Lab 14. Assigning Curriculum Using the Learner Needs Management Tool

Step

1. Navigate to **Learners** > **Tools** > **Learner Needs Mgmt**.

Note*: You can also access the tool from the Quick Links section of the Home page, or by clicking the Assign Learning Needs link from the Actions area of the learner record.*

2. Click the **Add Curricula** radio button and click **Next**.
3. Click the **add one or more from list** link.
4. Enter criteria to search for the learners to have the curriculum added.
5. Click **Search**.
6. Click the **Add** checkboxes next to each learner who needs the curriculum.
7. Click **Add** and click **Next**.
8. Click the **add one or more from list** link.
9. Enter criteria to search for the curriculum to add.
10. Click **Search**.
11. Click the **Add** checkbox next to the curricula to add.
12. Click **Add**.
13. Click **Next**. Note the assign date.
14. Click **Next**.
15. Click **Run Job Now**.

Job Aid: Assign Learning via Basic Methods

LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- Learning Needs

The Learning Needs report returns the learning needs of learners. Learning needs are learning items or curricula that the learner needs to complete.

- Learning Plan

The Learning Plan report returns the learning plan of learners. Learning plans are learners' personal docket of learning items and curricula.

- Curriculum Status

The learner Curriculum Status report returns the curriculum assigned to each learner and the curriculum status, and if applicable, the number of days remaining before required retraining to keep the curriculum current.

- Curriculum Item Status

The learner Curriculum Item Status report returns, for each learner, the curriculum assigned to each learner and their curriculum status, the items assigned to each curriculum and the completion date, completion status, and required date for each item.

CONCLUSION

In Lesson 4, you were introduced to making manual assignments to learners. You can assign one or more items directly to a learner from the Learning Plan tab from the Related area within a learner record; assign one or more curricula directly to a learner from the Curricula tab from the Related area within a learner record; or assign one or more items to a group of learners using the Learner Needs Management tool.

You should now be able to:

- Assign an item directly to a learner
- Assign a curriculum directly to a learner
- Batch assign an item/curriculum to a group of learners

LESSON CHECK

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

1. True or false:

Administrators can assign multiple curricula to a learner from within a learner record.

2. True or false:

Administrators can change a learner's required by date for an item from the Learning Plan tab from the Related area of a learner's record.

3. True or false:

The Learner Needs Management tool can be used to batch assign items and curricula.

NOTES

Lesson 5: Automated Learning Assignments

The goal for this lesson is to provide detailed information about setting up and propagating automated learning assignments to learners in SATERN. Now that you have created item and curriculum records, you are ready to assign learning to your learners.

Objectives

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

- Add a curriculum to a job position
- Add a curriculum to an assignment profile and propagate to current learners
- Describe how the assignment profile synchronization automatic process manager (APM) works

Learning Assignment Main Concepts

This lesson focuses on the automated methods of assigning learning to learners. Only curricula can be assigned through automated assignment methods. There is no way in SATERN to automate the assignment of a “free-floating” item; however, it is possible to set up a curriculum that contains one item, if necessary.

You can set up automated learning assignments using job positions and assignment profiles.

CURRICULA AND JOB POSITIONS

Curricula can be associated with job positions. When a learner is assigned a job position, curricula can be automatically assigned to the learner and the items contained within the curricula added to their Learning Plan. The relationship between a curriculum and a job position is created in the job position record (Figure 21).

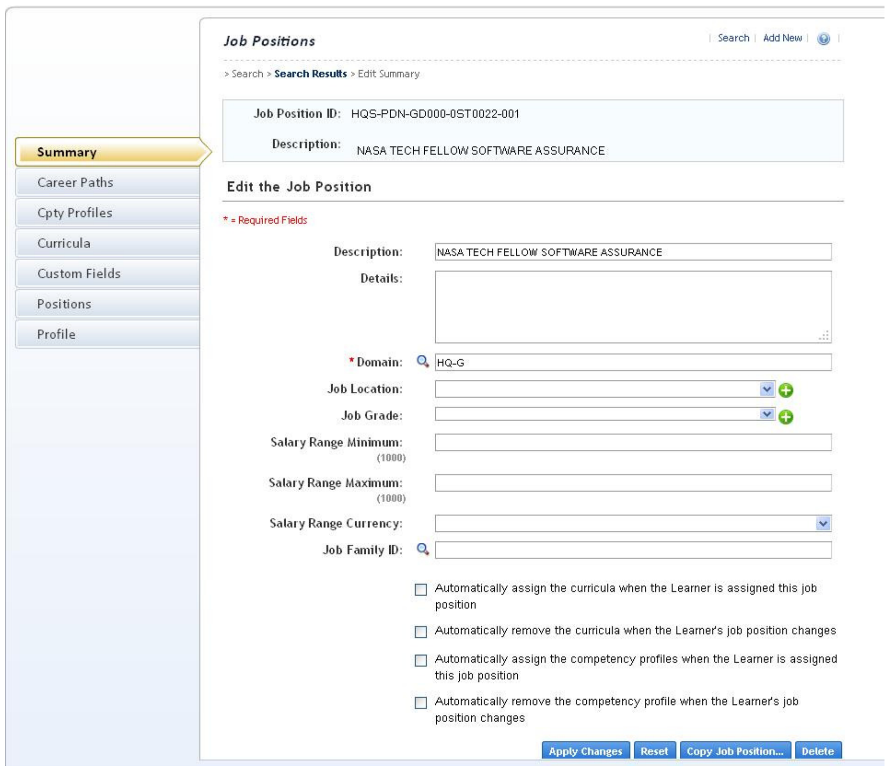


Figure 21: Job Position Records: Summary Tab

To automatically assign/remove curricula using a job position, the **Automatically assign the curricula when the learner is assigned the job position** and **Automatically remove the curricula when the learner's job position changes** checkboxes must be checked.

Curricula are added to the job position on the Curricula tab (Figure 22).

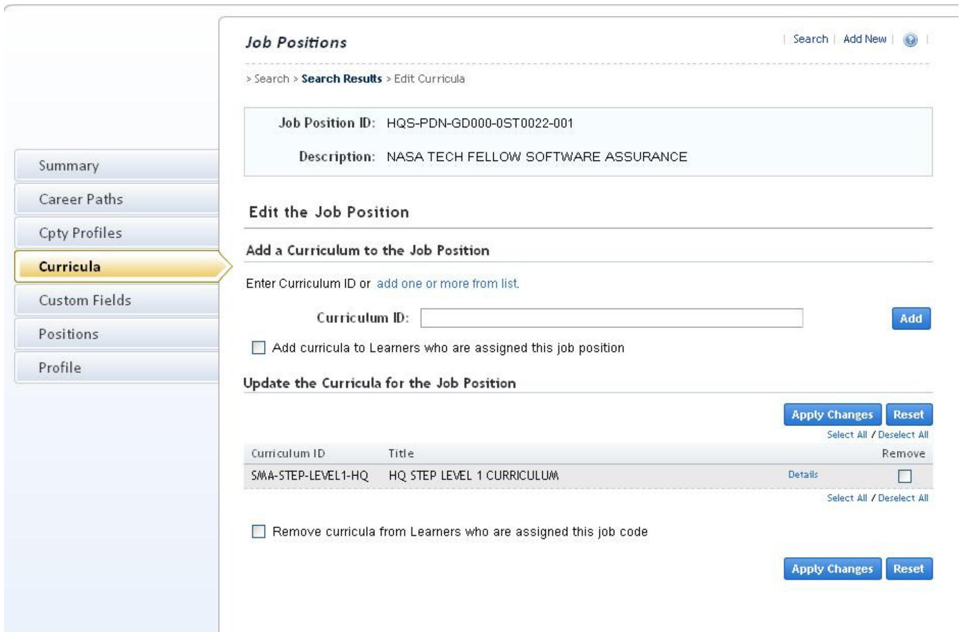


Figure 22: Job Position Record: Curricula Tab

***Note**: When adding a curriculum to a job position, if you want all learners who currently have that job position to receive the curriculum assignment, check the **Add curricula to learners who are assigned the job position** checkbox.*

Once curricula have been associated with a job position, the relationship can be viewed from the **Job Positions** tab from the Related area of the curriculum record (Figure 23).

Figure 23: Related Area of Curriculum Record: Job Positions

Lab 15. Associate a Curriculum to a Job Position

Step

1. Navigate to Learners> Job Positions.
2. Enter criteria to search for the desired job position and click Search.
3. Click the Edit icon ( ) to access the job position record in edit mode.
4. Scroll to the bottom of the Summary tab page.
5. Click the Automatically assign the curricula when the learner is assigned this job position and Automatically remove the curricula when the learner’s job position changes checkboxes.
6. Click Apply Changes.
7. Select the Curricula tab.
8. Click the add one or more from list link.
9. Enter criteria to search for the curriculum to add.
10. Click Search.
11. Click the Add checkbox next to the curriculum to add.
12. Scroll to the bottom of the search results page.
13. Check the Add curricula to learners who are assigned this job position checkbox.
14. Click Add.

Note: If this action impacts too many records, the system may require you to schedule the job to run during established off-peak hours.

Job Aid: Manage Curricula

ASSIGNMENT PROFILES

The assignment profile provides a way to automate assigning curricula to a group of learners who share the same training needs. The assignment profile uses the common attributes of a group of learners to assign curricula. Competency profiles, learner roles, plans, and catalogs may also be assigned using assignment profiles (Figure 24).

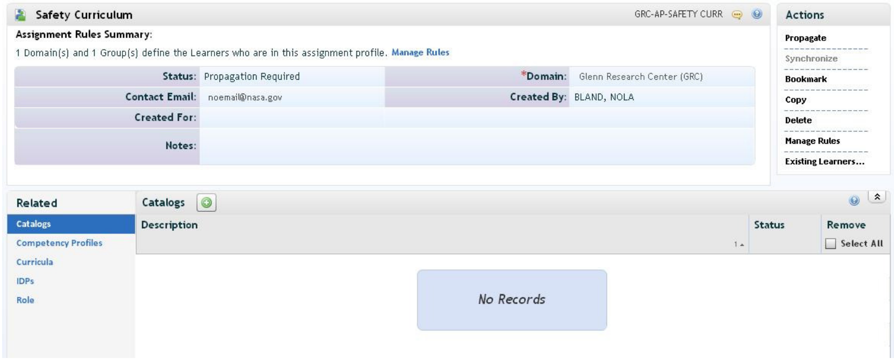


Figure 24: Assignment Profile Record

The steps for creating and using a new assignment profile are:

1. Add a new assignment profile.
2. Create a group by creating rules:

Select the learner domains to which the profile will be applied (first level filter) and the attributes of the target learners (second level filter) and assign values to the attribute.

3. Select one or more curricula.
4. Propagate the assignment profile.
5. Synchronization. An automatic process will check for changes to learner attributes and synchronize assignments accordingly. If

necessary, each assignment profile may be synchronized individually.

Groups, Rules, and Attributes

For each assignment profile, one or more groups may be created. Each group contains a set of rules. A learner's attributes must match one value from each line item in the defined rule and reside in one of the selected domains in order for the learner to be assigned the curricula in the assignment profile.

Attributes that may be added to the rule include:

- Learner ID
- Address
- City
- State
- Country
- Postal Code
- Gender
- Domain
- Organization
- Employee Status
- Employee Type
- Job Position
- Hire Date
- Hire Month
- Supervisor ID
- Customer defined fields (custom columns)

- Item completion (may be used to find learners who have a particular item in their Learning History)

Once an attribute has been added to a rule, the specific values for the attribute must also be added. An operator must be selected to restrict these values.

Main Areas of Assignment Profile

The item record is broken into three main areas (Figure 25):

- Core (red)
- Related (yellow)
- Actions (green)

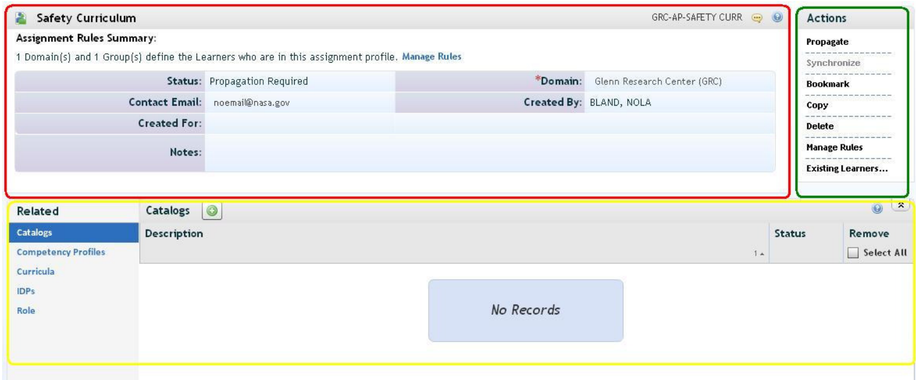


Figure 25: Assignment Profile Record

Core Area

The core section contains the basic information of the assignment profile record, including status, contact email, created for, created by, domain, and notes. To edit a field, click in a field and enter text or select a reference value (depending on the field type).

Related Area

Table 4 provides a list of and descriptions for each Related area tab of the assignment profile record.

Table 4: Related Area Options and Descriptions: Assignment Profile Record

Section	Description
Catalogs	Add the catalogs that should be assigned to learners via the assignment profile
Competency Profiles	Add the competency profiles that should be assigned to learners via the assignment profile
Curricula	Add the curriculua that should be assigned to learners via the assignment profile
Role	Add the learner role that should be assinged to learners via the assignment profile.

Actions Area

The Actions area of the assignment profile record contains additional actions that can be done with the assignment profile, including:

- Propagate (manually engage the assignment profile)
- Synchronize (manually run the synchronization process on the one assignment profile)
- Bookmark
- Copy
- Delete
- Manage Rule (modify the existing rules for the assignment profile)
- Existing Learners in Assignment Profile (display the list of current learners impacted by the assignment profile. Only provides results after AP is propagated)

Table 5 provides the definitions of the assignment profile attribute operators. Note that not all operators are available for each selected attribute.

Table 5: Assignment Profile Operators and Definitions

Operator	Definition
Matches	Allows multiple values to be entered. Selected learner attribute must exactly match one of the entered values.
Between	Used to set a numeric or date range.

Contains	Entered value must be part of selected learner attribute.
Is Empty	Selected learner attribute must be null.
Equals	Allows one value to be entered.
Greater Than or Equal To	Used to set a numeric value and all values greater than that number.
Include Sub Records Of	Used to include subrecords, if any, of the selected value.
Less Than or Equal To	Used to set a numeric value and all values less than that number.
Starts With	Entered value must be the first part of a selected learner attribute.
Does Not Match	Allows multiple values to be entered. Selected learner attribute must not have one of the entered values.
Does Not Contain	Entered value must not be part of selected learner attribute.
Is Not Empty	Selected learner attribute must not be null.
Does Not Equal	Allows one value to be entered. Entered value must not be part of selected learner attribute.
Does Not Start With	Entered value must not be the first part of a selected learner attribute.
On or After	Used to set a specific date and dates in the future.
On or Before	Used to set a specific date and dates in the past.

Job Aid: Assignment Profile Operators

Activity

Does the learner match the profile?

Domains:

- IT
- HR

Attributes

Group	Attribute	Operator	Value
1	Job location	Matches	DC, MD, CA
1	Hire date	Between	01/01/2000 – 12/31/2010

Learners

Learner	Learner Attributes	Match?
Tom Smith	Domain: IT Job location: DC Hire date: 06/15/2008	
Jane Williams	Domain: HR Job location: MD Hire date: 04/05/2007	
Bob Thomas	Domain: EHS Job location: DC Hire date: 07/08/2007	
Jan Jones	Domain: IT Job location: VA Hire date: 10/30/2006	

Associating Curricula

Curricula are added to the assignment profile from the Curricula tab from the Related area of the assignment profile record (Figure 26). Multiple curricula can be assigned through a single assignment profile if needed.

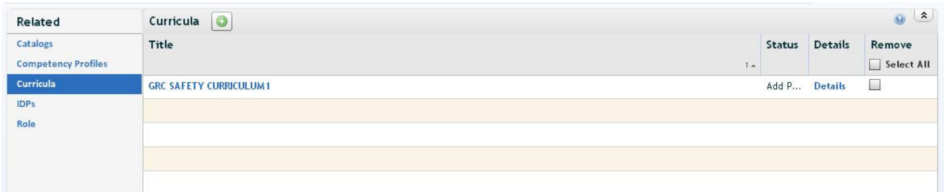


Figure 26: Related Area of Assignment Profile Record: Curricula

Propagate Assignment Profile

To “push” the curricula out to learners who currently match the assignment profile criteria, click the Propagate link in the Actions area (Figure 27). Manual propagation only needs to be done when the assignment profile is initially created or if the domains or attributes in the rule change.

Figure 27: Actions Area of Assignment Profile Record

Once the assignment profile is propagated, the Assignment Profile Synchronization APM runs on a regularly scheduled basis. The Assignment Profile Synchronization APM looks at every active learner record to see if there are any learners who now meet or no longer meet the assignment profile criteria. For learners who now meet the criteria, the curricula assignment is made; for learners who no longer meet the criteria, if the curricula assignment was originally made through the assignment profile, the curricula is removed (unassigned) from the learner.

Lab 16. Add a New Assignment Profile

Step

1. Navigate to **Learners > Assignment Profile**.
2. Click **Add New**.

   Note: You can also enter ***Add Assignment Profile*** *into the* ***Search*** *field below the button bar and click* ***Go****.*

3. Enter an assignment profile ID.
4. Enter a description.
5. Select a domain.
6. Enter an email address for the person responsible for the assignment profile.
7. Enter the created for information. This identifies the person who requested the assignment profile to be created.
8. Enter any applicable notes.
9. Click **Add**.
10. In the **Recommended Next**: box, click **Define Learner Pool**.
11. Click **OK** on the **Create Assignment Rules** pop-up message.
12. In the **Set up Rules** section, select **Job Location ID** from the **Select Attribute** drop-down menu.
13. Select **Matches** from the **Select Operator** drop-down menu.
14. In the values box (currently blank), enter **ARC-A, ARC-APS**. You can also use the magnifying glass icon to search for the desired values.
15. Click **Save**.
16. In the **Set up Domain** section, click **Add Domain**(s).

17. Enter criteria to search for the desired domains. For this lab, enter the keyword **ARC**.
18. Click **Search**.
19. Check the **Top Level Only** checkbox(es).
20. Click **Add**.
21. Click **Save**.
22. Click **Preview Learners in Assignment Profile** to see which learners currently match the criteria.
23. Close the preview window.
24. In the Set up Rules section, click in the Untitled Rule 1 box and enter a rule description.
25. Click **Save**.
26. Click **Cancel** to return to the main assignment profile screen.
27. In the **Recommended Next**: box, click **Add Curricula**.
28. Click **Add New Curricula** ( ).
29. Enter criteria to search for curricula.
30. Click **Search**.
31. Check the **Add** checkbox for the curricula to associate with the assignment profile.
32. Click **Add**.
33. Repeat steps 28-32 for each curriculum to add to the profile.
34. In the **Actions** area, click **Propagate**. The system may require you to schedule this as a background job. Once this job runs, all learners with the attributes you specified will be assigned the selected curricula. Once the assignment profile has been successfully propagated, the **Existing Learners in Assignment**

Profile link in the Actions areas can be used to display the learners that are currently being impacted by the assignment profile.

Job Aid: Assign Learning via Assignment Profile

ASSIGNMENT PROFILE SYNCHRONIZATION APM

Administrators set up assignment profiles in SATERN and configure the Assignment Profile APM to periodically synchronize the assignment profiles by running through new and changed learner attributes to sort learners according to their profile.

For example, you can configure an assignment profile that includes all learners in a particular city. The system looks for the city attribute of the learner object and assigns all matching learners to the new assignment profile. When you add or change an assignment profile, you must propagate it, meaning that the system runs through all learner records to find learners in a matching city to put in the new assignment profile.

Propagation and synchronization are two different processes. Any time an assignment profile is created or changed, it must be propagated through a background job before it can be synchronized through the automatic process. Assignment profiles that are not propagated are skipped during the assignment profile synchronization process.

Synchronize Assignment Profile

When and why would you synchronize an assignment profile?

Let's say that you just added 10 new learner records for individuals who are starting with your company today. If they log in to the learner interface, they have no items in their Learning Plan and no access to any catalogs. For all new hires, however, your company wants them to take some "New Hire" orientation training, and your company has created a "New Hire" assignment profile that includes all new hires.

In this situation, you could access the “New Hire” assignment profile and click Synchronize in the Actions area. If you run the job immediately, then the new hires could log in to the learner interface and access their orientation training on their first day of employment.

The system allows you to synchronize an assignment profile only after you have propagated it. When you click Synchronize, you can schedule the job to run immediately or in the background. When the job runs, the system executes the Assignment Profile Synchronization automatic process but only for this assignment profile.

LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- Learning Needs

The Learning Needs report returns the learning needs of learners. Learning needs are learning items or curricula that the learner needs to complete.

- Learning Plan

The Learning Plan report returns the learning plan of learners. Learning plans are learners' personal docket of learning items and curricula.

- Curriculum Status

The learner Curriculum Status report returns the curriculum assigned to each learner and their curriculum status, and if applicable, the number of days remaining before required retraining to keep the curriculum current.

- Curriculum Item Status

The learner Curriculum Item Status report returns, for each learner, the curriculum assigned to each learner and their curriculum status, the items assigned to each curriculum and the completion date, completion status, and required date for each item.

CONCLUSION

In Lesson 5, you were introduced to automated learner assignments. Curricula can be associated to a job position and assignment profiles and automatically assigned to learners whose attributes match the criteria.

You should now be able to:

- Add a curriculum to a job position
- Add a curriculum to an assignment profile and propagate to current learners
- Describe how the assignment profile synchronization automatic process (APM) works

LESSON CHECK

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

1. True or false:

An assignment profile must be propagated when it is created in order to "push" out the curriculum to learners.

2. True or false:

A job position can be used to assign multiple curricula.

3. True or false:

If a learner changes job positions, the system will always automatically remove (unassign) all curricula initially assigned through the job position.

Lesson 6: Record Learning Events

The goal of this lesson is to provide a general understanding of the Learning Event Recorder. Recording a learning event creates a Learning History record for learners and allows those learners who successfully complete an item to generate a certificate of completion.

OBJECTIVES

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

- Identify the two types of learning events that can be recorded
- Record a learning event
- View the learning event in the Learning History

LEARNING EVENT MAIN CONCEPTS

Using the Record Learning Event quick link on the Welcome screen, you may record the completed learning for learners; or you can navigate **to Learners > Tools > Record Learning Event**.

Note: To return to the Welcome screen and access the quick links as you work in SATERN, click Home in the button bar.

A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item

When an admin has been informed of item completions, he/she uses the Record Learning tool to capture this information. Once the event is recorded, a Learning History record is created for each item for each learner. If an error is recorded, you may have the ability to edit it with the Learning Event Editor (if you have been given the appropriate workflow).

TYPES OF LEARNING EVENTS

There is one type of learning event:

- Item-based events (including scheduled offerings)

Item-Based Events

Items are the primary events found in the list of learning events for learners. Learning events for items include those that were created as scheduled offerings and those with online content where the system records the learning event when the learner completes the content. All items may have a learning event recorded against them for any learner, even if the item was not a part of his/her Learning Plan.

DATA RECORDED IN A LEARNING EVENT

The following information can be captured when recording the learning event:

- Learner information
- Item title
- Completion date/time
- Completion status code/grade: indicates whether or not an item was successfully completed.
- Hours of Credit
- Instructor (will display on certificate of completion)

- Comments

ACCESS RECORD LEARNING TOOLS

There is one recording tool: Record Learning Event.

You can access the tool in one of two ways:

- Click Record Learning Event from the Quick Links section on the Home page if you've added that function to your Quick Links (Figure 28)

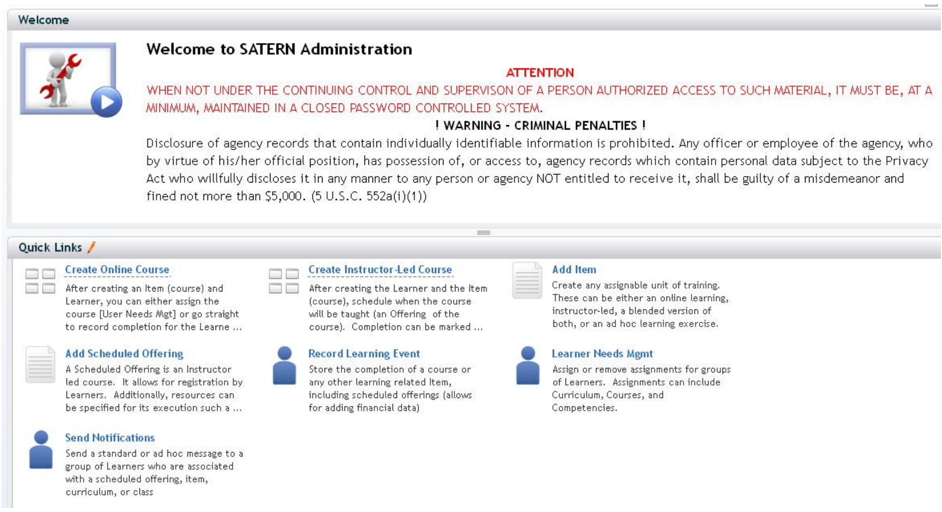


Figure 28: Record Learning Event: Quick Links

- Navigate to **Learners** > **Tools** > **Record Learning Event** (Figure 29)

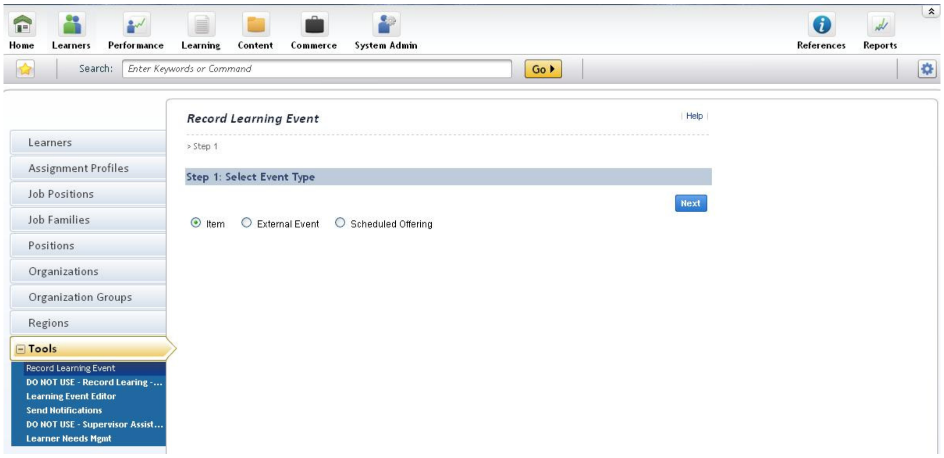


Figure 29: Learners > Tools > Record Learning Event

Lab 17. Recording a Learning Event for Item(s) Completion

Step

1. Use the **Record Learning Event** tool.
2. Select the **Item** radio button.
3. In the **Search & Add Items** section, enter the item type and ID.
4. Click **Add**.

Note: You can also use the magnifying glass icon to search for and select the item.

5. Repeat steps 3-4 to add additional items.
6. In the **Search and Add Learners** section, enter the learner ID.
7. Click **Add**.

Note: Again, you can also use the magnifying glass icon to search for and select learners.

8. Repeat steps 6-7 to add additional learners.
9. Click **Next**.
10. In the **Edit Details** section, enter details for the item:
    a. Completion date and time
    b. Time zone
    c. Grade or completion status (whichever is flagged as required)
    d. Total hours, credit hours, contact hours, and CPE
11. Click the **More Options** icon ( ) to enter instructor information and comments.
12. Click **Apply Changes** to make the changes apply to all learners.
13. Click the **Expand** icon ( ).

14. If the details are different for each learner, change the item details accordingly. Enter the completion date, time, and time zone for each learner for the item.

15. If you modified the details for any learner, click **Apply Changes** in the yellow section of the screen.

16. Repeat steps 10-15 for all other items.

Note: The other Apply Changes buttons (at the top and bottom of the Edit Details section) may be used if you want to enter the same completion status for all learners for a particular item.

17. Click **Next**.

18. Click **Submit**.

Job Aid: Record Learning

LEARNING HISTORY

After a learning event is recorded, the **Learning History** tab from the Related area of the learner record (Learning History on learner side) displays the learning events that have just been completed. From the learner record's Learning History tab, you are able to view the history of all entered events (Figure 30).

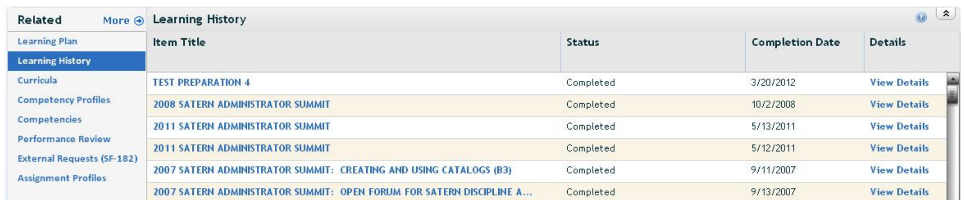


Figure 30: Related Area of Learner Record: Learning History

Items with Retraining

Select items within a curriculum that must be repeated on a recurring interval will have a retraining assignment. Once the item is complete and recorded (in the learner's Learning History), it is flagged as complete and the next *required by* date it is due according to the date calculated by the retraining assignment. In this situation, you will see the item in the Learning Plan with the new date for completion and in the Learning History with the date completed.

Certificate of Completion

Admins or learners can print certificates upon successful completion of an item. Certificates are generated in .pdf format and will open in Adobe Acrobat Reader. Certificates are not generated within SATERN for external events.

LEARNING EVENT EDITOR

Learning events may be edited and files may be attached to the record with the Learning Event Editor tool found under the **Learners > Tools** menu. You need to be given permissions to edit or delete learning event records. Any costs associated with the learning event record may be edited as well.

An attachment framework is used to allow you to attach external documents to records in SATERN. For example, if a learner completed a course that required a paper-based test at the end, the paper-based test could be digitized (scanned into a PDF or MSWord document using other means) and attached to the learning history record using the Learning Event Editor tool for future reference.

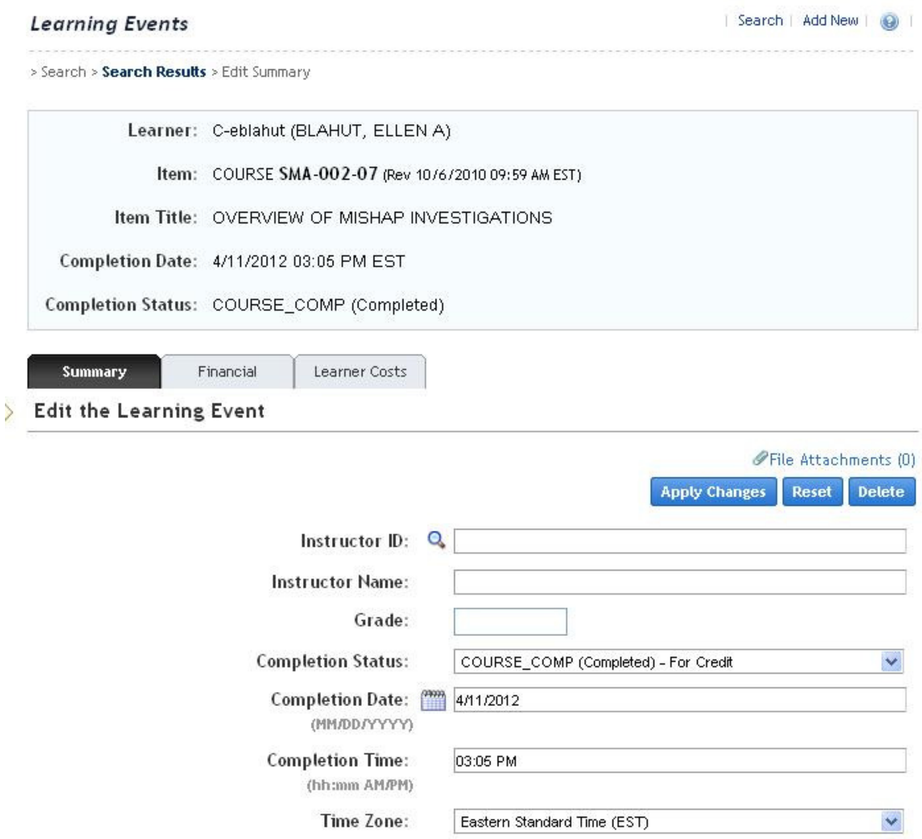


Figure 31: Learning Event Record

The attachment interface shows all attachments related to the entity. In addition, it allows for additions and removals of attachments. When you click the **File Attachments** link on the **Summary** tab of the record (Figure 31), you can browse for a file to attach to the record. It is recommended that you enter a description to identify each file more easily (you cannot modify a description after you upload the file). Click **Upload** to finish the attachment process (Figure 32).

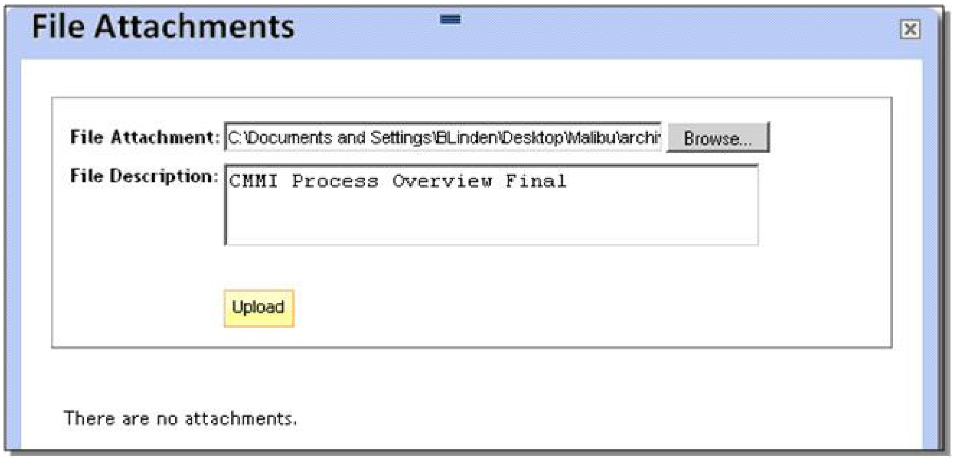


Figure 32: File Attachment Interface

If you attempt to attach a file that is of an unsupported type, a validation error displays (Figure 33). If you attempt to attach a file that is larger in size than allowable, another similar validation error also displays.

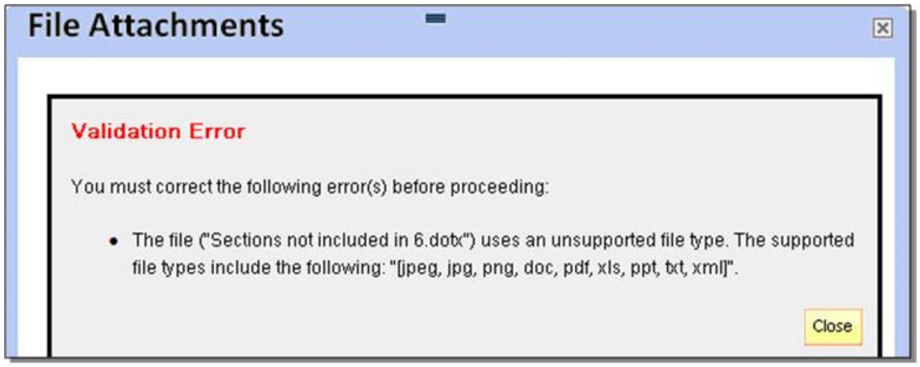


Figure 33: File Attachment Validation Error

Learners can access attached files in the learner interface by reviewing the learning history details of the recorded item (Figure 34), and administrators can access the attached files in SATERN Administration on the Learning History tab from the Related area of a learner record.

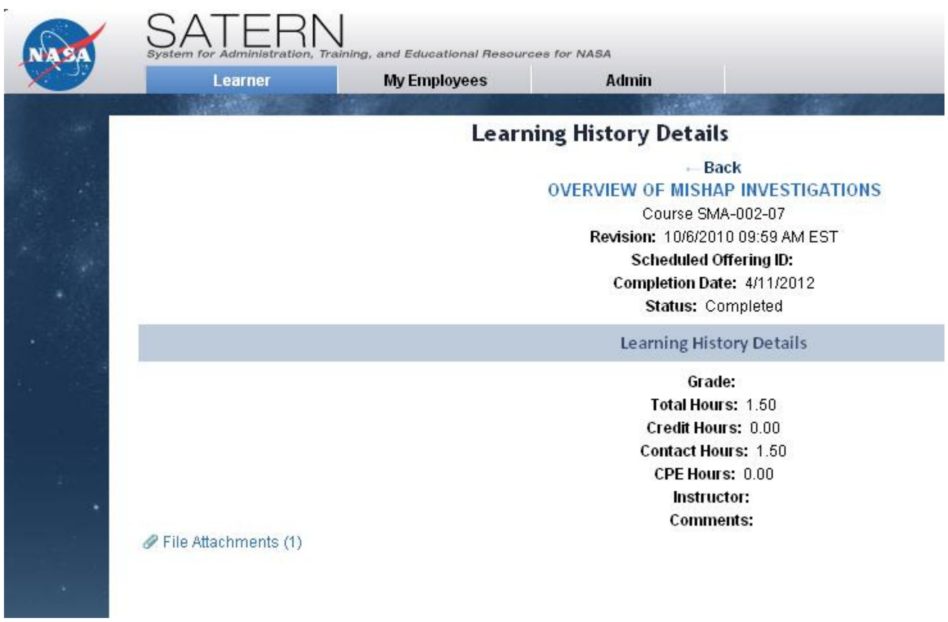


Figure 34: Learner-side Learning History> Item Details

LESSON-RELATED REPORTS

The following are reports in SATERN that relate to this lesson:

- Learning History

The Learning History report returns learners' learning history (learning items and curricula they have finished) with detail item events.

- Item Status

The Learner Item Status report returns, for each learner and item, the learners' completion status for the items they participated in during the given date range.

- Curriculum Item Status

The learner Curriculum Item Status report returns, for each learner, the curriculum assigned to each learner and their curriculum status, the items assigned to each curriculum and the completion date, completion status, and required date for each item.

CONCLUSION

In Lesson 6, you were introduced to recording learning events. Learning events can be recorded against items (including scheduled offerings). A Learning History record is created for the learner.

You should now be able to:

- Identify the type of learning event that can be recorded
- Record a learning event
- View the learning event in the Learning History

LESSON CHECK

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

1. True or false:

Only *For Credit* completions are displayed in a Learning History.

2. For which of the following may a learning event be recorded?
   a. Item
   b. Scheduled offering

3. True or false:

Learners can edit their Learning History record.

Course Summary

Through lecture, activities, and hands-on computer lab work, this course taught you the concepts and terminology associated to SATERN Learning Needs Management. You developed a working knowledge of this area for use in implementation of your learning needs management strategy. You also gained basic, hands-on experience using the system functions in order to create and modify items and curricula, assign learning through manual and automated methods, and record learning events.

You should now be able to:

- Add and modify items
- Add and modify curricula
- Configure period-based curriculum assignments
- Assign learning to learners
- Propagate automated learning assignments to learners
- Record a learning event for an item

Final Activity

1. Identify an actual curriculum in your organization that requires at least two items to be completed by a group of learners. Identify the types of items and the kind of information you need to include on the various tabs.

2. Decide whether or not any of the items should be retaken after a given number of days.

3. Be sure to perform, at a minimum, the functions below:
    a. Add two new items.
    b. Add a curriculum and associate the items created in Step a.
    c. Assign the curriculum to a group of learners.
    d. Record a learning event for a group of learners against one of the items from Step a.
    e. View a learner's Learning History for which you recorded the learning event and verify the item is listed.

Learning Extras

This section provides some extra learning-related topics, including:

- Substitutes and prerequisites
- Item Revision Assistant
- Requirements-based curricula
- Required Dates Editor
- Learner management tools

SUBSTITUTE AND PREREQUISITES

In some training situations, it is necessary to grant a learner substitute credit for item A after completing item B (this is especially useful in curricula). Also, it may be necessary to prevent a learner from registering into an advanced item until after the successful completion of the prerequisite basic item.

Topic Objectives

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

- Establish substitute relationships
- Establish prerequisite relationships

Substitute Items

Upon successful completion of an item, SATERN Learning can grant completion credit for another (substitute) item by recording two learning events.

For example, the Microsoft Basic Word item is listed on Sally's Learning Plan. Microsoft Advanced Word is a substitute for Microsoft

Basic Word. Sally completes and passes Microsoft Advanced Word. After an admin records the advanced course as a learning event for Sally, SATERN Learning records an additional learning event for the basic course (Figure 35).

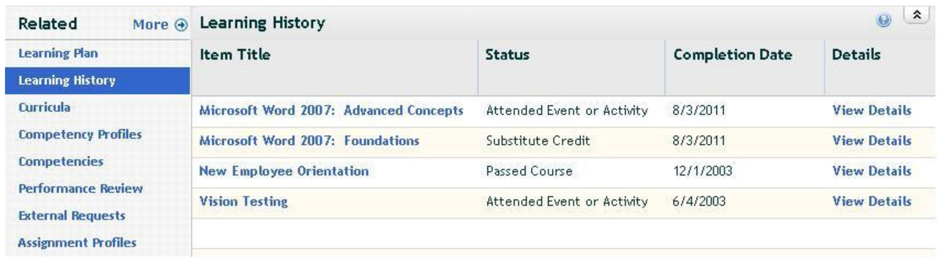


Figure 35: Learning History of a Substitute Item

This is particularly useful in a curriculum. For example, the Microsoft Office Curriculum requires the completion of Microsoft Basic Word. The learner assigned this curriculum must have Microsoft Basic Word on his/her Learning History (Completed Work) to fulfill the requirement. Substitutes record a learning event of the required item in the learner’s Learning History (Completed Work) in order to satisfy the curriculum requirement.

Force Credit

If **Force Credit** is not checked, then learners must have the item receiving substitute credit on their Learning Plan in order to record the substitute learning event. When **Force Credit** is checked, learners always receive substitute credit for the item regardless whether it is assigned to their Learning Plan.

Effective Date

If an effective date is set when a substitute relationship is created, all learners who have the grant item, with a completion date on or after the effective date, are given retroactive credit for the item receiving the credit.

Lab 18. Establish a Substitute Relationship

Step

1. Search for the item that will be recorded into a learner's learning history (completed work) with a status of *substitute credit*.
2. Click the item ID link.
3. Select the **Substitutes** tab from the Related area.
4. Click **Add New Substitutes** ( ).
5. Enter criteria to search for the item that will grant substitute credit.
6. Click **Search**.
7. Select the (completion) status substitute credit from the Status drop down menu.

Note: This is the completion status for the item that will receive substitute credit.

8. Check the **Force Credit** checkbox.

Note: If you would like to apply retroactive substitute credit, enter an effective date.

9. Check the **Add** checkbox.
10. Click **Add**.
11. Verify the selected item is displayed with the correct settings.
12. Record a learning event for the item that grants substitute credit (the item selected in step 9).
13. Check the learner's Completed Work (Learning History).

Job Aid: Manage Substitutes and Prerequisites

Prerequisites

Prerequisites are identified on the item record’s Prerequisite tab, which lists all items the learner must complete before he/she can self-register for a scheduled offering or launch an online item. Depending on the SATERN Learning global setting, learners who do not meet the prerequisites are prevented from registering into the scheduled offering if:

- The prerequisite(s) are not listed in the learner’s Learning History (Completed Work)

or

- The learner is not registered into scheduled offering(s) of the prerequisite(s) that has an end date prior to the start date of the scheduled offering.

In the case of an online item, the prerequisite(s) must be in the learner’s Learning History (Completed Work) before he/she is able to launch the item.

Lab 19. Establish a Prerequisite Relationship

Step

1. Add two new items.
2. Select the **Prerequisites** tab from the Related area of one of the items.
3. Click **Add New Prerequisites** ( ).
4. Enter criteria to search for the other item created in step 1. This will be the prerequisite item.
5. Click **Search**.
6. Check the **Add** checkbox.
7. Click **Add**.
8. Verify the selected item is displayed.

Job Aid: Manage Substitutes and Prerequisites

Topic Related Reports

The following are reports in SATERN Learning that relate to this topic:

- Item with Item Prerequisites
- Substitute Relationships

Topic Conclusion

In this topic, you learned about substitutes and prerequisites. Using these features in SATERN Learning allows learners to take differing items to satisfy their curriculum requirements, or prevents learners from registering into items they are not prepared to take. In any case, these features are not required, but provide additional flexibility in your training solution.

You should now be able to:

- Establish substitute relationships between items
- Establish prerequisite relationships between items

Topic Check

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

1. How many learning events are recorded on completion of a substitute item when **Force Credit** is used?

2. True or false:

It is possible to set up an **or** relationship of items on the Prerequisites tab from the Related area of the item record.

3. Why would you check the **Force Credit** checkbox on the Substitute tab from the Related area of the item record?

4. Explain a situation where you need to create a substitute relationship.

Activity

Consider the following situation:

- Item A grants credit for Item B.
- Item B grants credit for Item C.
- Force Credit is **not** checked.
- Effective date is **not** set.

Answer the following question:

1. If the learner is assigned all three items to his/her Learning Plan and completes Item A, the learner:
   a. Only receives credit for items A and B.
   b. Receives credit for items A, B, and C.
   c. Only receives credit for Item A, since **Force Credit** is not checked.

ITEM REVISION ASSISTANT

When content of a Standard Operating Procedure (SOP) or a course changes dramatically, an organization may require its employees to re-read the SOP or attend the new and revised course. The Revision Assistant enables the admin to create a new version of the item for all learners who:

- Are required to complete the item as a part of a curriculum
- Have the item as a free-floating assignment

Topic Objectives

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

- Revise an item using the Revision Assistant
- Explain the function of the Curriculum Clean Up automatic process
- Describe the affects of item revision on curriculum and free floating item assignments

Revising Items

As mentioned in Lesson 1, the item key is comprised of item type, item ID, and revision date/time. During item revision, SATERN Learning creates a new item record where the item type and ID of the new item are identical to the original. The revision date/time is the updated portion of the item key.

Admins have the option of updating the version number to meet their organization's standard revision number system. After the revision process is complete, you should inactivate the old item. It is not deleted from SATERN Learning in case there is a need to access the old item for audit and reporting purposes.

Making revisions to items have effects to the following:

- Substitutes
- Instructor authorization
- Curriculum assignment of the original item
- Free floating assignment of the original item
- Future scheduled offerings of the original item
- Prerequisites

Substitutes

If you check the appropriate checkbox in Step 2 of the Revision Assistant, SATERN Learning copies the substitute items listed under the Substitute tab from the Related area of the original item to the Substitute tab from the Related area of the revised item.

Instructor Authorization

If you check the appropriate checkbox in Step 2 of the Revision Assistant, authorized instructors of the original item are authorized to teach the revised item.

Curriculum Assignment of the Original Item

If you check the appropriate checkboxes in Step 4 of the Revision Assistant, SATERN Learning lists the revised item on the learner's Learning Plan (even if there is a successful learning event recorded for the original item). If the original item is on the Learning Plan, both items displays until SATERN Learning runs the Curriculum Cleanup automatic process.

Free Floating Assignment of the Original Item

If you check the appropriate checkboxes in Step 4 of the Revision Assistant, SATERN Learning lists the revised item on the learner's

Learning Plan. Both items display until SATERN Learning runs the Curriculum Cleanup automatic process. (Highlight this and test it, in 5.8 it would NOT remove free-floating items, only items assigned via curricula.)

Future Scheduled Offerings of the Original Item

If you check the appropriate checkbox in Step 4 of the Revision Assistant, SATERN Learning updates existing scheduled offerings that have start dates in the future with the revised item.

Inactivate

If you check the appropriate checkbox in Step 4 of the Revision Assistant, SATERN Learning inactivates the old version of the item. Admins will need to include Not Active records when searching for the item if they want previous revisions.

Prerequisites

Prerequisites of the original item are automatically transferred to the revised item. Admins should be reminded to double-check this tab (and all other tabs) within the revised item once it is created to make sure they are still valid.

Lab 20. Revise an Item

Step

1. Navigate to **Learning > Items**.
2. Search for an item and click the item ID.
3. Click **Revise** in the **Actions** area.
4. Enter a new revision date, revision time, and revision number.
5. Change the item title, if necessary.
6. Click **Next**.
7. Check the substitute relationship and authorized instructors checkboxes.
8. Click **Next**.
9. Select the **Make this item production ready** option.
10. Click **Next**.
11. Check all four checkboxes in Step 4 of the item revision process.
12. Click **Next**.
13. If this item is part of a curriculum, review the item settings within each curriculum and make any necessary changes to assignment types, initial periods, retraining periods, etc.

> ***Note****: If the item has an assignment type of Required (or similar), you must enter an effective date.*

14. Click **Next** and review the displayed information.
15. Click **Run Job Now**.

Job Aid: Revise Items

Curriculum Clean Up

Once an item is revised, there are two item records in the system with matching item types and IDs. Both may be listed on the Learning Plan of the assigned learners (depending upon the choices made during the revision process).

The Curriculum Clean-Up APM (Automatic Process Module) checks every Learning Plan and compares item records. If it finds two items with the same ID and type, it removes the item with the earlier revision date/time. The APM also has a checkbox to include free-floating item assignments (Figure 36), which is intended to remove the relationship between an earlier revision of an item and the related curriculum if two (or more) revisions of an item are related to the same curriculum or any free-floating items, and both are effective (have an effective date before today's date).

Note*: Curriculum Clean-Up typically runs nightly, but speak with your SATERN Learning coordinator to find the frequency.*

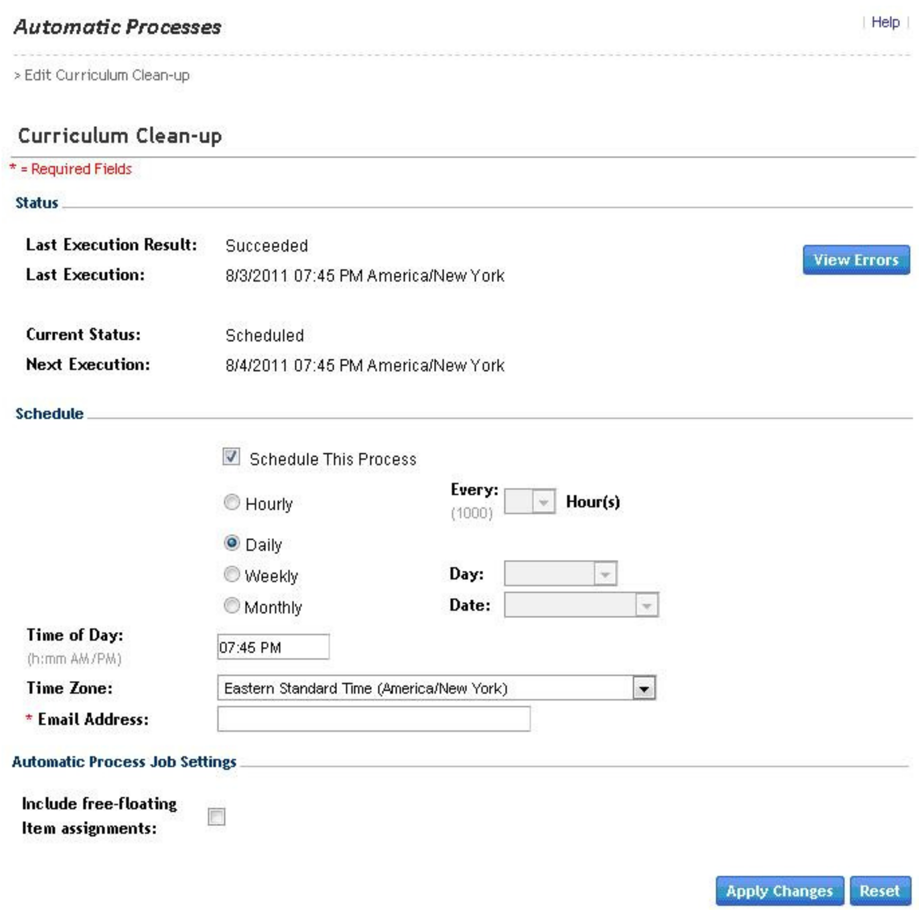


Figure 36: Curriculum Clean-up APM

Topic Conclusion

In this topic, we discussed revising items. Based upon admin specifications, the revision process can affect curriculum and/or free-floating item assignments. The Revision Assistant can also maintain substitute relationships, authorized instructors, and update future scheduled offerings. Finally, the Curriculum Clean-Up automatic process removes the double item assignment from learner's Learning Plans.

You should now be able to:

- Revise an item using the Revision Assistant

- Explain the function of the Curriculum Clean Up automatic process
- Describe the affects of item revision on curriculum and free floating item assignments

Topic Check

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

1. True or false:

The admin can choose to not transfer prerequisites from the original item to the revised item.

2. Explain a situation when you do not want to preserve substitute relationships.

3. Why is it important to run Curriculum Clean-Up?

4. Explain a situation when you would set the effective date in the future.

5. What part of the item key is updated during the item revision?

6. True or false:

An admin can update all future scheduled offerings of the original item to the revised item.

REQUIREMENT-BASED CURRICULA

Not all training situations are solved with a simple list of required items. There are other requirements that a learner must accomplish to complete his/her assigned curriculum (e.g., hours, external training, etc.). Requirements-based curricula provide this needed flexibility.

Topic Objectives

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

- Define a requirement and item pooling
- Describe requirements-based curricula
- List the three requirement types
- Describe the functionality of a requirement group
- Create requirements and requirement groups

Requirement-Based Curricula

Requirements-based assignments provide flexibility in creating and assigning multiple requirements that are used in evaluating curriculum status. External learning events can also count towards curriculum status.

What is a Requirement?

Requirements define a set of conditions that the learner must meet to receive a *Complete* curriculum status. The conditions are related to the number of hours or items that the learner must successfully complete. Learners are required to meet the defined conditions of the Requirements and Items tabs to complete the curriculum.

A requirement object functions like an item. Both are assignable, use period-based assignments, and impact the curriculum status.

Requirement Types

There are three requirement types:

- # hours of specified hour type
- # hours of specified hour type from pool of items
- # items from pool of items

 # Hours of Specified Hour Type

This type requires hours of one of the following hour types:

- Total hours
- Credit hours
- Contact hours
- CPE hours

SATERN Learning grants requirement hour credit for any item, scheduled offering, or external learning event.

 # Hours of Specified Hour Type from Pool of Items

This type requires hours of one of the following hour types:

- Total hours
- Credit hours
- Contact hours
- CPE hours

SATERN Learning only grants requirement hour credit for items included in the pool.

 # Items from Pool of Items

This type requires the learner to complete a specified number of items included in the pool.

Lab 21. Create a Requirement

Step

1. Navigate to **Learning** > **Requirements**.
2. Click **Add New**.
3. Select **# Items from Pool of Items** from the **Requirement Type** drop-down menu.
4. Enter a requirement ID.
5. Enter a requirement description.
6. Select a domain ID.
7. Enter the creation date.
8. Leave the **Active** checkbox checked.
9. Enter any comments, as desired.
10. Click **Next**.
11. Enter the required of number of items the learner must complete from the pool.
12. Click the **add one or more from list** link.
13. Enter criteria to search for items to add to the requirement pool.
14. Click **Search**.
15. Check **Add** next to each item to add to the pool.
16. Click **Add**.
17. Verify the selected items are listed in the Item Pool for Requirement section.
18. Click **Add**.

Job Aid: Requirements-Based Curricula

Requirement Group

The requirement group is located under the Requirements tab from the Related area of the curriculum record. This gives the learner a requirements option.

For example, the following requirement group contains the following requirements:

- 10 Items from Item Pool
- 75 Total hours

This group requires the learner to earn 10 Item from Item Pool or 75 total hours to complete the requirement.

Lab 22. Assign Requirements to a Curriculum

Step

1. Navigate to **Learning** > **Curricula**.
2. Enter criteria for the curriculum to which to add requirements.
3. Click **Search**.
4. Click **Curriculum ID** to which to add a requirement.
5. Select the **Contents** tab from the Related area.
6. Click **Edit**.
7. Click **Add Content** ().
8. Select **Requirements** from the drop-down menu.
9. Enter criteria to search for the desired requirements.
10. Click **Search**.
11. Check **Add** next to each requirement to add.
12. Click **Add**. The new requirement is added to the bottom of the list on the **Curriculum Contents** tab.
13. To make the requirement required, click the **Edit** link and enter initial, retraining, and effective date information for each requirement. Setting an effective date makes the requirement "required".
14. Click **Apply Changes**.
15. *Optional*: To group requirements:
    a. If more than one requirement is added to the curriculum, check **Select** next to the requirements to group.
    b. Click **Group Requirements**.

c. Enter group description, initial training, retraining assignment information, and effective date.

d. Click **Create Group**.

16. The new requirement group is added to the bottom of the list on the **Curriculum Contents** tab.

Job Aid: Requirements-Based Curricula

Topic Conclusion

In this topic, we discussed requirements-based curriculum. Using requirements, an admin specifies the number of hours of a specific hour type, the number of hours of a specific hour type from an item pool, or a number of items for an item pool. In addition, the admin creates requirement groups to give the learner a choice of requirements. Using requirements provide greater flexibility than simple required items.

You should now be able to:

- Define a requirement and item pooling
- Describe requirements-based curricula
- List the three requirement types
- Describe the functionality of a requirement group
- Create requirements and requirement groups

Topic Check

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

1. List the three requirement types.

2. Explain item pooling.

3. True or false:

External learning events count towards # Hours of specified Hour Type.

4. How do you create an **or** situation with one or more requirements?

REQUIRED DATES EDITOR

This topic introduces you to the Required Dates Editor tool in SATERN Learning.

Topic Objectives

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

- Update the item required date using the Required Dates Editor
- Identify situations to use the Required Date Editor
- Describe the effect of the Learning Event Synchronization process on manual required dates

Required Dates Editor

Admins can change required dates directly on the learner's Learning Plan. This is not practical if you need to update a large number of learning records. The Required Dates Editor is a tool used to change the required date of one or more items assigned to one or more learners. This is used when:

- A scheduled offering is not available until a later date.
- The scheduled offering has been cancelled due to lack of resources (classrooms, instructors, etc.)

The Required Dates Editor updates required dates of free floating and curriculum item assignments (Figure 37).

Figure 37: Required Dates Editor

The Required Dates Editor requires the admin to update the required date using the same method as assignment.

For example, if you assigned Item A via curriculum 1, then you must update the required date by specifying the Item A in curriculum 1 in the Required Dates Editor.

Likewise, if you assigned an Advanced Project Management item directly to a learner’s Learning Plan, then you must specify the item in the Required Dates Editor.

Lab 23. Use the Required Dates Editor

Step

1. Navigate to **Learning** > **Tools** > **Required Dates Editor**.
2. Click the **add one or more from list** link to add learners.
3. Enter criteria to search for learners.
4. Click **Search**.
5. Check the **Add** checkboxes next to each learner who needs a required date change.
6. Click **Add**.
7. Click **Next**.
8. Click the **add one or more from list** link to search for curricula to add.
9. Enter search criteria.
10. Click **Search**.
11. Check the **Add** checkbox next to each curriculum to add.
12. Click **Add**.
13. Click **Next**.
14. Click the **add one or more from list** link to search for free-floating items to add.
15. Enter search criteria.
16. Click **Search**.
17. Check the **Add** checkbox next to each free-floating item to add.
18. Click **Add**.
19. Click **Next**.
20. Enter a new required date for each item listed.

21. Click **Finish**.

***Note**: The message lists the number of learner records that were updated with the new required date(s).*

Job Aid: Use the Required Dates Editor Tool

Learning Event Synchronization

This process verifies the learning events of learners. It also re-calculates required dates. Therefore, this process overrides all manually updated required dates, including those updated with the Required Dates Editor, and resets them to calculated dates based on the item assignment.

Topic Conclusion

In this topic we discussed the Required Dates Editor. This tool is useful when scheduled offerings are cancelled or unavailable and you need to provide additional time for learners to complete their item assignments. The Required Dates Editor requires the admin to update the required date the same way the item was assigned (e.g., curriculum or free floating). Finally, if the Learning Event Synchronization process runs, it overrides the manual required dates and resets them based on the item assignment.

You should now be able to:

- Update the item required date using the Required Dates Editor
- Identify situations to use the Required Date Editor
- Describe the effect of the Learning Event Synchronization process on manual required dates

Topic Check

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

1. Describe a situation when you would use the Required Dates Editor.

2. Where is the Required Dates Editor located in SATERN Learning?
   a. Tools > Required Dates Editor
   b. Learner > Tools > Required Dates Editor
   c. Learning > Tools > Required Dates Editor

3. True or false:

If an admin assigned an item via a curriculum, but selects the item in step 3 of the Required Date Editor in order to change the required date, SATERN Learning updates the required date of the item.

LEARNER MANAGEMENT TOOLS

In many situations, we need to contact learners to inform them of a change, correction, or update; or supervisors leave the organization; or multiple records exist for the same learner. The tools in Learner Management address all three situations.

Topic Objectives

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

- Send a notification to a learner population based on item or curriculum criteria
- List the additional filtering options of the email notification
- Assign a new supervisor to multiple learners

Notification Assistant

The Send Notifications wizard identifies a group of learners and then sends a message to them as an ad-hoc notification. An ad-hoc notification broadcasts email through SATERN Learning like a standard notification, but you control the time that it is sent and the group of learners to which it is sent instead of the system automatically grouping and sending the notification.

Item Assignment

Using the Email Notification Assistant, an admin sends email to learners based on:

- Free floating item assignments
- Item assignment type
- Completion status

Curriculum Assignment

Using the Email Notification Assistant an admin sends email to learners based on:

- Curriculum assignments
- Completion status

Lab 24. Send Item/Curriculum Assignment Notification

Step

1. Navigate to **Learners > Tools > Send Notifications**.
2. Click the **Item** (or **Curriculum**) radio button.
3. Click **Next**.
4. Click the **add one or more from list** link to add items/curricula.
5. Enter search criteria.
6. Click **Search**.
7. Check the **Add** checkbox next to each item/curriculum.
8. Click **Add**.
9. Click **Next**.
10. Refine your search by selecting a requirement type and/or completion status (or curriculum status for curriculum).
11. Click **Next**.
12. Verify the list of selected learners. If necessary, add additional learners.
13. Click **Next**.
14. Search for:
    a. Email Template (optional)
    b. Reply To address (optional)
    c. From address (required)
    d. CC addresses (optional)
    e. Add an attachment (optional).
    f. Enter a subject for the notification (required).
    g. Enter the body for the notification (required).
15. Click **Send Notification**.

Job Aid: Send Notifications

Topic Conclusion

In this topic, we discussed the additional tools available. If you need to send an email based on an assignment, reassign a supervisor, or consolidate learner records, the Learner Management tools step you through the process.

You should now be able to:

- Send a notification to a learner population based on item or curriculum criteria
- List the additional filtering options of the email notification

Topic Check

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

1. True or false:

Email notifications arrive to the learners the instant the admin presses the Send button.

2. Besides the specific items and curriculum, name the additional filtering options in the Send Notifications tool.