SATERN

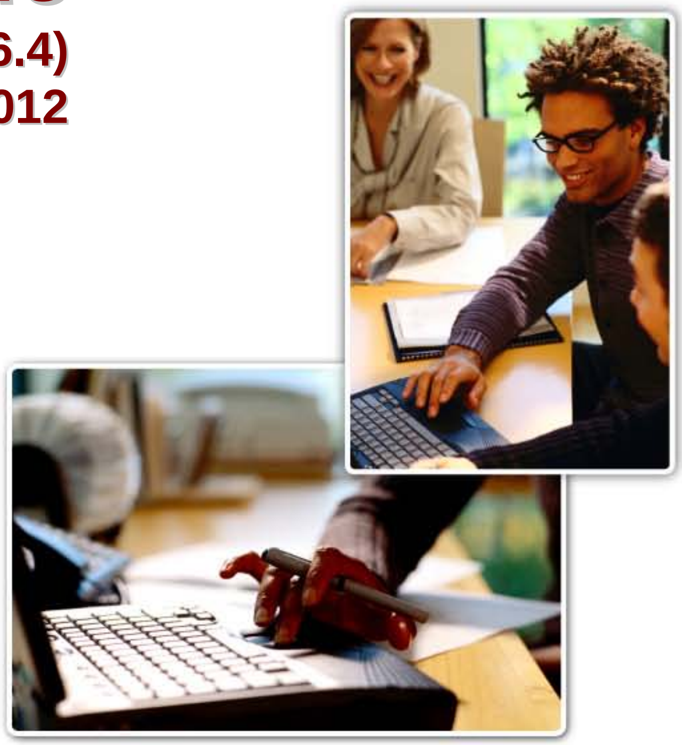
System for Administration, Training, and Educational Resources for NASA

National Aeronautics and Space Administration

Scheduling Management

Classroom Guide

(Version 6.4)
May, 2012



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For SATERN v 6.4

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From the NASA SATERN Program Office:

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

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Lesson 1: Scheduled Offerings

After creating instructor-led/blended items, the next step is to schedule them for a specific date, time, and location in order to track learner registration. Scheduled offerings are an Instructor-led or Blended Learning Item with a scheduled date and time.

OBJECTIVES

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

- Define scheduled offering terminology
- Create a scheduled offering
- Describe the purpose of the main tabs within a scheduled offering

SCHEDULING OVERVIEW

Scheduling management is the process of creating scheduled offerings for instructor-led/blended items or schedule blocks. This course focuses on scheduling items within SATERN Learning. Creating a scheduled offering places an instance of the item on the calendar, allows resources to be associated with it, and allows learners to be registered into it. Learners are registered into scheduled offerings by the admin, their supervisor, or themselves. The process also triggers email notifications that may be sent to participants, supervisors, instructors, and contacts associated with the offering.

Scheduling Terminology

Table 1 presents some terms and definitions related to scheduling in SATERN Learning.

Table 1: Scheduling Terms and Definitions

Term	Definition
Scheduled Offering	An Instructor-led or Blended Learning Item with a scheduled date and time.
Schedule Block	A schedule block prevents resources from being scheduled into another offering during a given time. Schedule blocks are often used to make learners and resources unavailable on the learning calendar, such as when equipment is undergoing maintenance, or a learner is out of the office for an extended period of time.
Segment	A block of instruction within a Scheduled Offering. Scheduled Offerings must contain at least one Segment.
Class	A group of learners who are tracked as a group and perhaps complete a series of scheduled training requirements.
Resources:	Assets that are assigned and reserved to a segment within a scheduled offering.
Instructor	A person who will instruct or facilitate a specific portion of the scheduled offering.
Facility	A building where training takes place (e.g., Headquarters).
Location	A space or room within facility (e.g., a classroom, computer lab).
Equipment	Reusable training objects (e.g., VCR, TV, video cameras, or LCD).
Materials	Consumable training objects (e.g., notepads, markers, or specific training guides).
Custom Resources	Resources not categorized above intended to track training cost (e.g., catering or parking fees).

ADDING A SCHEDULED OFFERING

When you add a new scheduled offering, you must select the item to schedule and determine a start date and time. SATERN Learning creates the segments of the scheduled offering using the information from the Segments tab from the Related area of the selected item record (Figure 1).

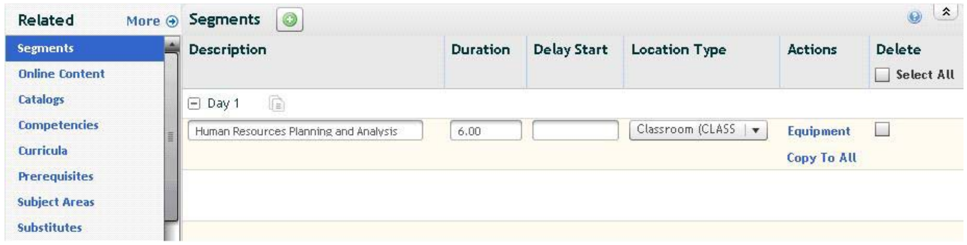


Figure 1: Delivery Data Tab: Item Record

Each scheduled offering is comprised of one or more segments. A segment is a block of instruction within a scheduled offering that can have resources assigned to it. Once the scheduled offering is created, an authorized admin can change the segment defaults.

Like items, scheduled offerings are made available to learners via catalogs. When a new scheduled offering is created the admin has the option to publish the new scheduled offering to all associated catalogs. You may remove scheduled offerings from certain catalogs, thereby making specific scheduled offerings available to some learners but not others; however, a scheduled offering cannot be added to a catalog that the item is not in.

You can add scheduled offerings from four locations:

- From Welcome page, click the Add Scheduled Offering quick link

> ***Note**: To access the **Welcome** page and quick links, navigate to **Admin > Home**, or click the **View Welcome Page** icon in the Bookmarks section.*

- Type **Add Scheduled Offering** into **Search** field below the button bar and click **Go**
- Item record (click the **Schedule** link in the **Actions** area)
- Navigate to **Learning > Scheduled Offerings** and click the **Add New** link

All four locations run a tool that provides a wizard interface, a schedule preview, and a resource usage view for scheduling items (or activities) (Figure 2).

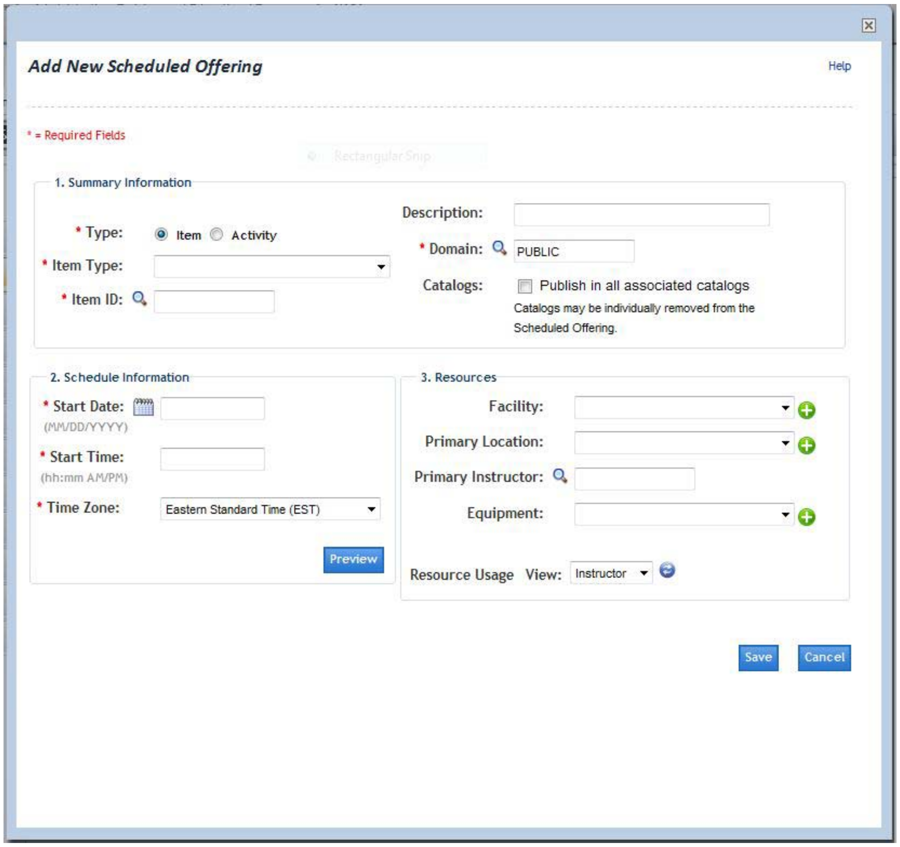


Figure 2: Add New Scheduled Offering Wizard

From this tool, you may set the default schedule information and select the default Primary Instructor, Primary Location, and equipment resources for all segments of the scheduled offering. The schedule preview and a resource usage view show possible resource conflicts.

Start Dates, Start Times, and Time Zones

When scheduling an item, you must specify a start date, start time, and time zone of delivery.

After you have entered all required information, click **Preview** to view the basic scheduling information for the offering (Figure 3).

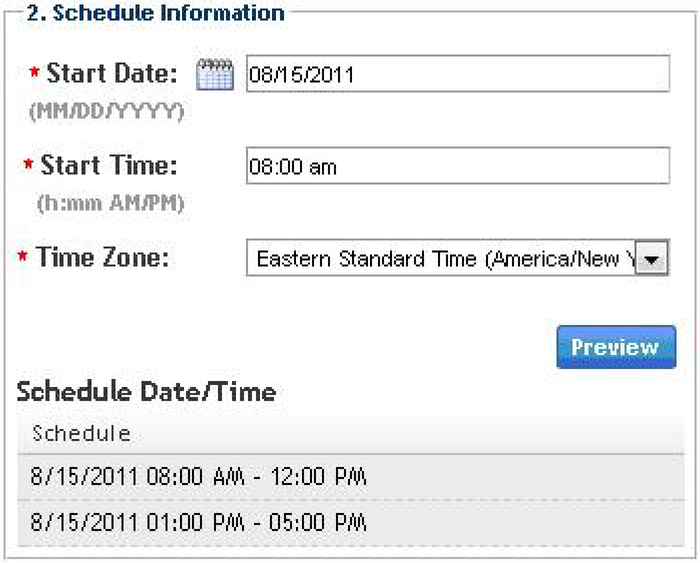


Figure 3: Schedule Information for New Scheduled Offering

Once the Scheduled Offering has been created, you may also decide to enable the **Use Time Zone of this Offering** option. If you want the start and end times of each segment to be displayed in the selected time zone, click **View All** from the core area to open the **Additional Settings** page. Scroll down to the **Physical Schedule** section. The default is set to **yes** from the **Use Time Zone of this Offering** drop-down menu. This is useful if learners are attending the offering from different time zones (Figure 4).

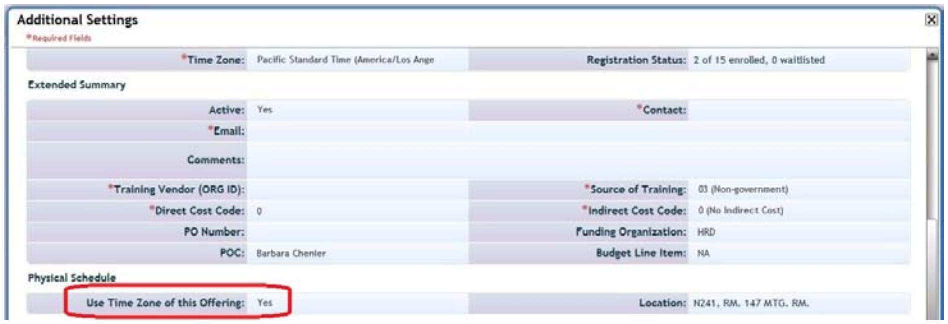


Figure 4: Scheduled Offering Time Zone Setting

If this option is set to **No**, then all times will be recalculated and displayed to the admin/learners in their preferred time zone.

***Note**: The admin should set this option to No for Virtual Learning System (VLS) scheduled offerings, as it will be beneficial for everyone to see the times in his/her own time zones.*

Note the **Always display Scheduled Offerings in this Time Zone** checkbox, located under Preferences on the admin records and under Options and Settings of the learner records, will override the selection within the **Use Time Zone of this Offering** drop-down menu within the scheduled offering record. This means that an admin or learner will see all scheduled offerings in his/her own time zone – regardless of the setting for a particular scheduled offering.

Resources

The primary purpose of the Resources area (Figure 5) is to allow you to identify any of the listed resources (Facility, Primary Location, Primary Instructor, Equipment) required for the scheduled offering.

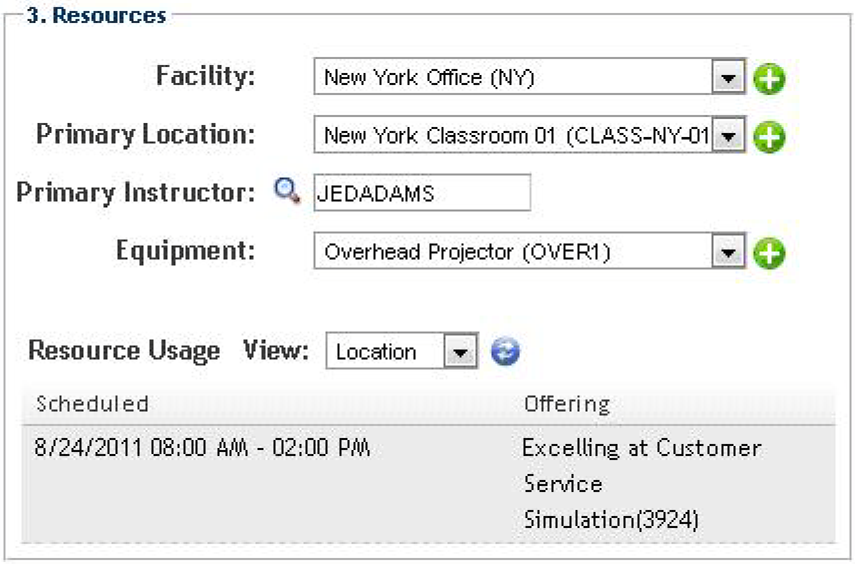


Figure 5: Identify Resources for New Scheduled Offering

If the facility, Primary location, Primary instructor, or equipment that you wish to attach to the scheduled offering does not already exist in system, then you can add it directly from the wizard interface. This is done by clicking the **Add** icon ( ) next to the respective resource field (Figure 6). The ability to add from the wizard is controlled by workflows.

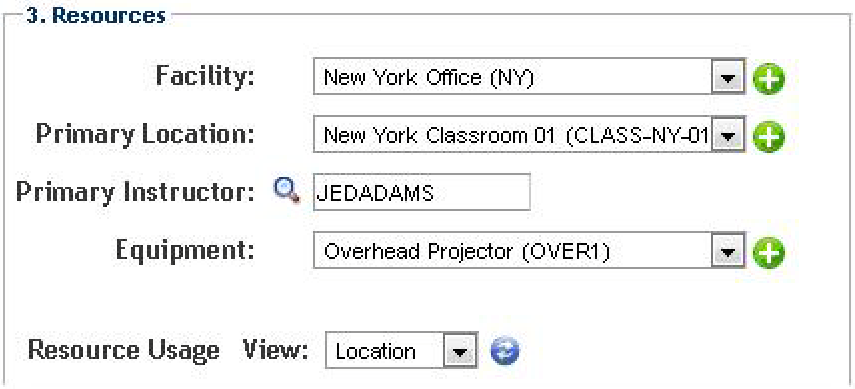


Figure 6: Add New Resources

After you enter all required information and associate the scheduled offering with at least one resource, select that resource from the **Resource Usage View** drop-down menu (Figure 7). The system shows all of the other scheduled offerings that also use the resource selected. If nothing is displayed, then the resource you selected is not being used by any other scheduled offering.

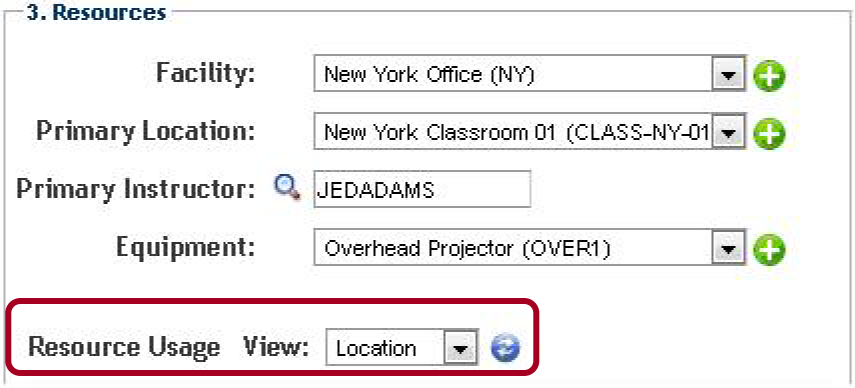


Figure 7: View Resource Usage

Lab 1. Add New Scheduled Offering

Step

1. Verify the **Admin** tab is selected.
2. Access the **Add New Scheduled Offering** wizard in one of the fours ways described in the previous section.
3. Select the **Item type** radio button.
4. Click the **Item ID** magnifying glass icon to search for the item to schedule (depending on the method you selected in Step 2, this information may be prefilled).
5. Enter a description for this scheduled offering.
6. Specify a domain for the new record.
7. Check the **Publish in all associated catalogs** checkbox.

***Note**: If you select the **Publish in all associated catalogs** checkbox, then (when you save the new scheduled offering) the system automatically adds this new scheduled offering to every catalog that the item already belongs to. This makes it visible and possibly available for learners to self register.*

8. Select a start date, start time, and time zone.

***Note**: The scheduled start date and time and the scheduled end date and time will appear below the schedule information.*

9. *Optional*: Click **Preview** to view the basic information for the offering.
10. Select a facility from the **Facility** drop-down menu.
11. If applicable, select the other resources associated with the scheduled offering: Primary location, Primary instructor, and equipment.

***Note**: Alerts are displayed if there are any resource conflicts. Depending on the item configuration, an alert may also display if the selected instructor is not authorized to teach the item.*

12. Click **Save**.

13. If there are any warnings, the Warning Details screen displays. Click **Yes** to continue.

14. The scheduled offering record displays allowing you to make further configurations.

15. For use in future labs, record the system generated scheduled offering ID (numeric value located in the upper right corner of the core area).

Job Aid: Create Scheduled Offering

SCHEDULED OFFERING RECORD: MAIN AREAS

The scheduled offering record is divided into three main areas (Figure 7):

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

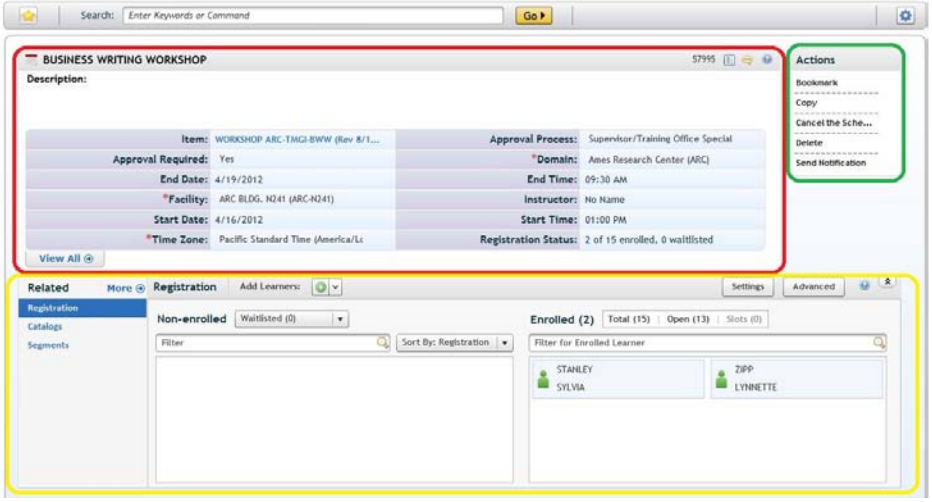


Figure 8: Scheduled Offering Record

These areas contain fundamental information regarding the scheduled offering. Some areas may be inaccessible (grayed out) depending on your role as an administrator within the system. .

This portion of the guide focuses on the most commonly used scheduled offering record areas, specifically the core area, and the Registration, Catalogs, and Segments tabs from the Related area, and describes some of the attributes found within these areas.

Core Area: Summary

You can use the core area of the selected scheduled offering record to update the basic attributes of the record (summary information). These attributes could include, for example, the offering description, domain, facility, registration settings, and any other fields deemed required by the global system administrators or added based on your **Personalize Fields** preferences (Figure 9).

Figure 9: Scheduled Offering > Core Area

Click **View All** to see additional settings for the scheduled offering, including title, description, summary, extended summary, physical schedule, and registration.

Table 2 provides the comprehensive list of fields that may be found within the scheduled offering record, a description of each field, and whether the field is displayed to learner.

Table 2: Scheduled Offering Record: Fields and Descriptions

Field	Description	Displays to Learner
Description	Additional information about the scheduled offering for leaners.	X
Domain	Indicates admin ownership of the scheduled offering (e.g., HR, IT, etc.).	

Field	Description	Displays to Learner
Facility	The building where the scheduled offering takes place.	X
Time Zone	Indicates the time zone of the scheduled offering.	X
Approval Process	Indicates a default approval process (if applicable) that a learner must complete before being able to complete the self-registration process.	
Approval Required	This checkbox triggers the approval process entered in the *Approval Process ID* field.	
Contact	The name of contact person for the scheduled offering (can also be included in the registration notification email).	X
Email	Email address of the contact person of the scheduled offering (can also be included in the registration notification email).	X
Active	This checkbox is used to indicate whether a scheduled offering is active and displays in the learner catalogs.	
Enable Learners to Waitlist	Selecting this checkbox indicates that the system will allow learners to be waitlisted for this item. If you select the *Auto Fill Registration* checkbox, waitlisted learners automatically replace learners who are withdrawn from the scheduled offering.	X
Registration Cut-Off Date/Time	The last date and time when a learner can change his/her registration status (e.g., register or withdraw).	X
Time Zone	The time zone of the *Registration Cut-Off Time*.	X
Published Price	The internal price of the scheduled offering (learners see catalog price).	
Self Registration	Displays the **Registration** button to learners so they can register for the scheduled offering.	X
Minimum Registration	The minimum number of learners needed to hold the request schedule process. This information carries over to the scheduled offering record.	
Maximum Registration	The maximum number of learners allowed in the scheduled offering. Check *Enable Learners to Waitlist* for the system to place learners who exceed the maximum on the waitlist.	X
Registration Status	The number of learners registered and waitlisted.	X
Email confirmations to	Select the corresponding check box to indicate to whom email notifications should be sent in reference to the selected scheduled offering.	

Related Area

The Related area contains additional information regarding the scheduled offering, including registration information, associated catalogs, and segment details (Figure 10).

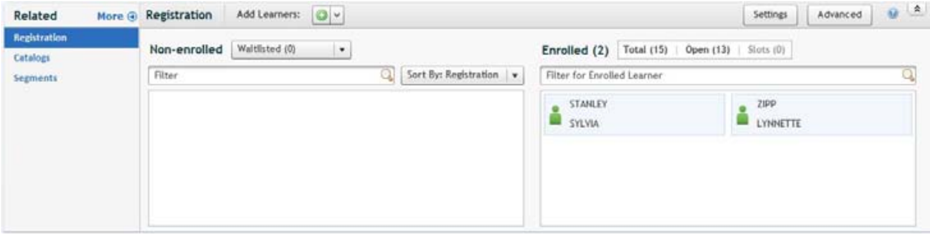


Figure 10: Related Area of Scheduled Offering Record

Managing Registrations

The Registration tab from the Related area (Figure 11) allows you to:

- Register learners for the scheduled offering
- Change learners' registration status
- Send email notifications to the learner, his/her supervisor, the instructor, and the designated contacts
- Add slots (seats for an organization) to the scheduled offering

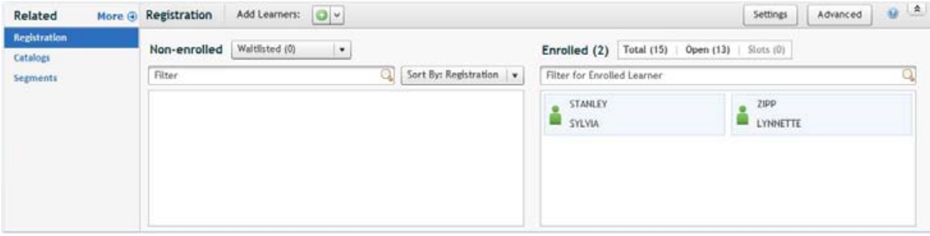


Figure 11: Related Area of Scheduled Offering Record: Registration

Associating Catalogs

The Catalogs tab from the Related area of the scheduled offering record allows you to determine which learner and supervisors can access the scheduled offering for self-registration. When an item-based scheduled offering is created, it is added to the catalog or catalogs in which the item is currently located.

You may decide not to permit learners or supervisors access to the specific scheduled offering by removing all the catalogs from this tab. It may be necessary to remove one or more catalogs from this tab to restrict access to particular learners. If removed, a catalog may be returned to this tab; however, a scheduled offering may never be placed into a different catalog than that of the item on which it is based (Figure 12).

Figure 12: Related Area of Scheduled Offering Record: Catalogs

Viewing and Modifying Segment Details

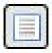
Scheduled offerings are divided into segments primarily for purposes of resource allocation (building scheduled breaks into the schedule is the other). A scheduled offering must have at least one segment. You can add additional segments or modify the date and time information in existing segments (Figure 13), and add resources to segments.

Note: Assigning resources is explained in more detail in the next lesson.

Figure 13: Related Area of Scheduled Offering Record: Segments

When you modify a segment, the system displays the **Save** and **Cancel** buttons. Click **Save** to save your changes or the system will discard those changes when you access another part of the application.

The calendar view is interactive and displays the day, week, and month views of the schedule. You can easily edit segments by dragging and dropping the segment details box to the new day and time.

You can edit any of the segments for the scheduled offering in list or calendar view, but you must use the list view to copy segments or record attendance for a segment (Figure 14). Click the **List View** icon ().

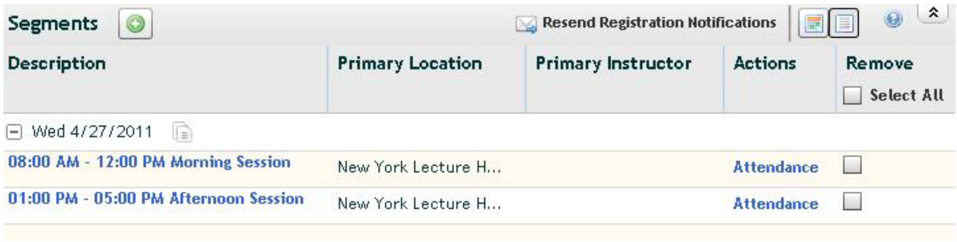


Figure 14: Segments Tab of Related Area: List View

To copy segments, click the **Copy Segments** icon ().

To record attendance for a segment, click the **Attendance** link in the **Actions** column to display the **Record Attendance** window (Figure 15). Click the checkbox in the **Attendance** column and enter any comments as necessary. You can click **Copy to Same Day Segments** to copy attendance information to all segments on the same day. Click **Apply Changes** to save your modifications.

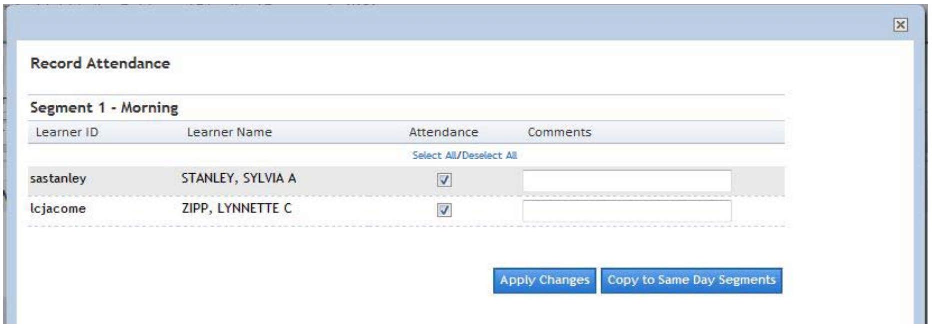


Figure 15: Record Attendance

LESSON-RELATED REPORTS

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

- Scheduled Offering Data

The Scheduled Offering Data report returns detailed information about each schedule offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

- Learning Calendar

The Learning Calendar report returns all the daily learning events scheduled within an entered date range.

CONCLUSION

In this lesson, you were introduced to the main scheduled offering concepts, areas within the record, and the information contained on each. Using the step-by-step instructions, you created a new scheduled offering and entered key information.

You should now be able to:

- Define scheduled offering terminology
- Create a scheduled offering
- Describe the purpose of the main areas (core, related, action) within a scheduled offering

In the next lesson, you will learn how to work with scheduled offering segments and resources.

LESSON CHECK

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

1. True or false:

Learners, supervisors, and admins are the three groups that may have the ability to register learners into scheduled offerings.

2. True or false:

An admin can be listed on the Contacts tab of a scheduled offering record.

3. True or false:

A scheduled offering may never be placed into a different catalog than that of the item on which it is based.

4. True or false:

If you want to display the start and end times of the segments of a scheduled offering in a specific time zone, you should click yes in the Use Time Zone of this Offering field.

5. A scheduled offering is:

   a. An instance of an item placed on a learning calendar.
   b. An assignable unit that a learner must complete.
   c. A grouping of curricula.
   d. None of the above.

6. True or false:

A scheduled offering must contain a segment.

7. Define the term schedule block.

Activity

Your boss has given you the following task:

- Management has decided to offer Item X to the employees.
- Your boss has told you it will be held two weeks from today from 9:00 AM – 5:00 PM.
- She wants this scheduled offering to be viewable to all learners.

Use SATERN Learning to perform this task.

Notes

Lesson 2: Segments

Once you create a scheduled offering, you may need to update the date/time and change resource allocation. This information is managed through the Segments tab, from the Related area of the scheduled offering record.

OBJECTIVES

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

- Modify segments of a scheduled offering
- Assign resources to a segment
- Record attendance for a specific segment

SEGMENT MAIN CONCEPTS

A segment is a block of time within a scheduled offering primarily used for resource allocation. If a learner is registered in a scheduled offering, he/she is registered in all segments. Segments contain any applicable resources (locations, equipment, instructors, etc.) needed for the specified timeframe. Resource assignment to a segment is optional, but each scheduled offering must have at least one segment.

In SATERN, a scheduled offering is created using the default segment structure from the Segments tab from the Related area of the item record.

RESOURCES ASSIGNED TO SEGMENTS

A segment can have multiple resources of the same type (e.g., two instructors) (Figure 16).

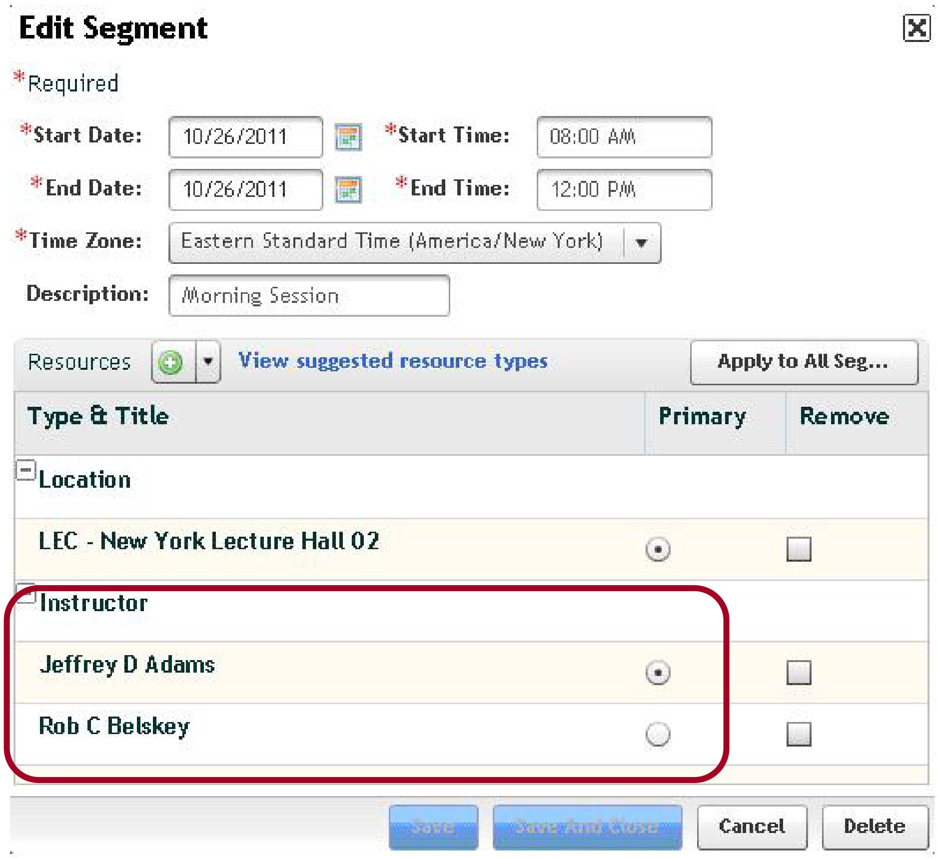


Figure 16: Two Instructors for Segment

Once a resource is assigned to a segment, it is “booked,” and if another admin attempts to schedule the resource during the same timeframe, SATERN alerts him/her that there is a conflict. You can view the conflict and take the appropriate steps to free up that resource or find an alternative.

In order for you to assign a resource to a segment, the resource record must already exist in the SATERN Learning database.

Activity

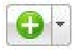
Using an item that you would schedule, list the resources you will need. How do you currently schedule and track these resources?

ASSIGNING RESOURCES TO SEGMENTS

SATERN provides the ability to schedule resources for the specific segments (times) in which they are needed instead of scheduling them for an entire scheduled offering. When multiple resources of a single type are associated with the segment, you have the ability to identify the primary resource for each segment. The Add Resources button enables you to assign equipment, materials, and custom resources to a segment.

Assigning Instructors

Once the instructor is identified (i.e., exists in SATERN), he/she can be assigned to the segment(s) within a scheduled offering.

Click Add Resources () and select Add Instructor from the drop-down menu (Figure 17).

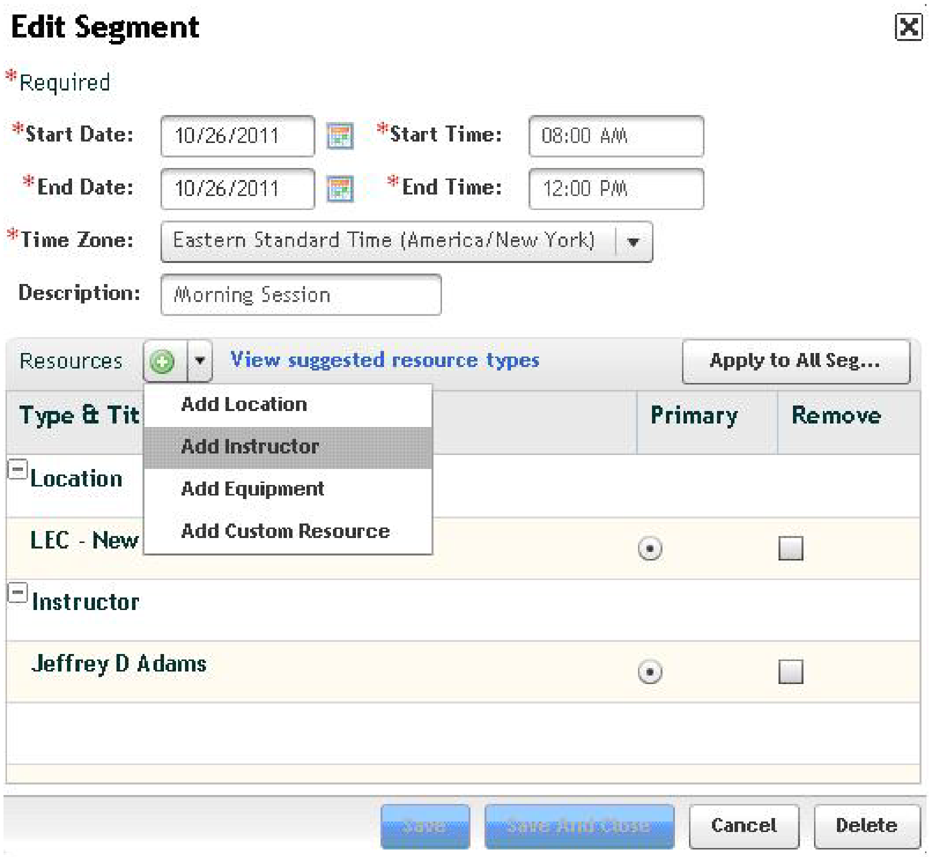


Figure 17: Segment - Add Instructor

SATERN returns all instructors in the search results. The search results include a column that displays the resource availability, which can help when determining the segment resource allocation (Figure 18):

- Not Available
- Available for entire scheduled offering
- Available for current segment
- Blank (when segment information is not available)

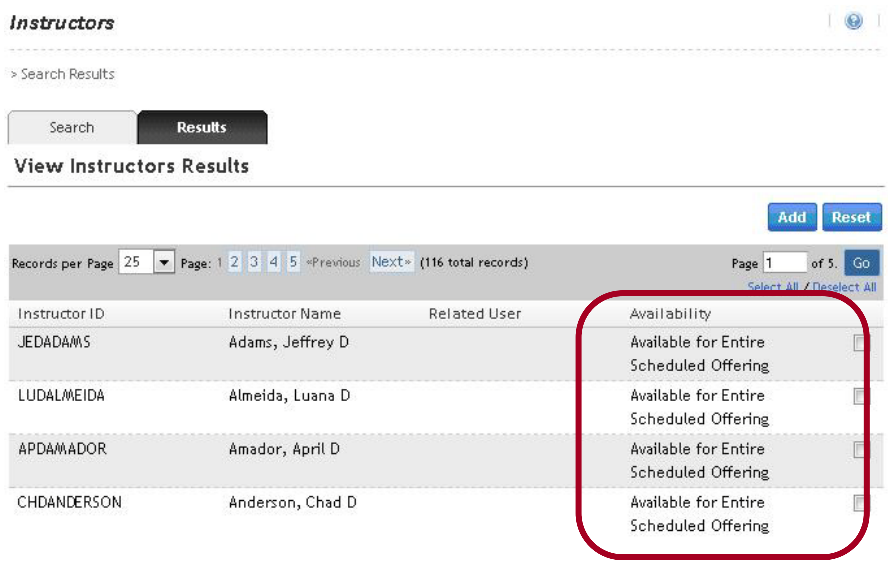


Figure 18: Instructor Search results

To perform a keyword search and select search filters, select the **Search** tab. Enter your search criteria and click **Search** (Figure 19).

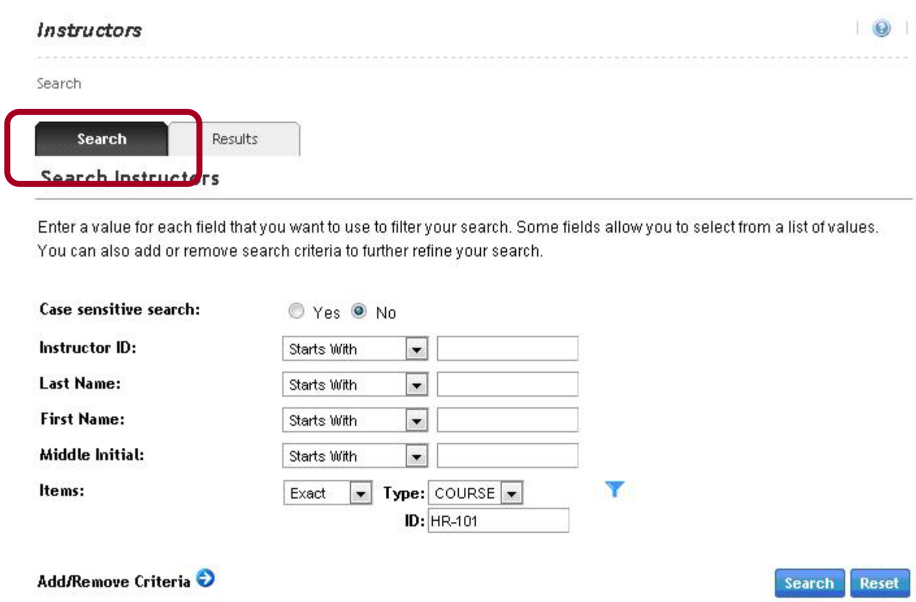


Figure 19: Keyword and Filter Search

Assigning Locations

When you identify the training location, you can assign it to the segment(s) within a scheduled offering (Figure 20).

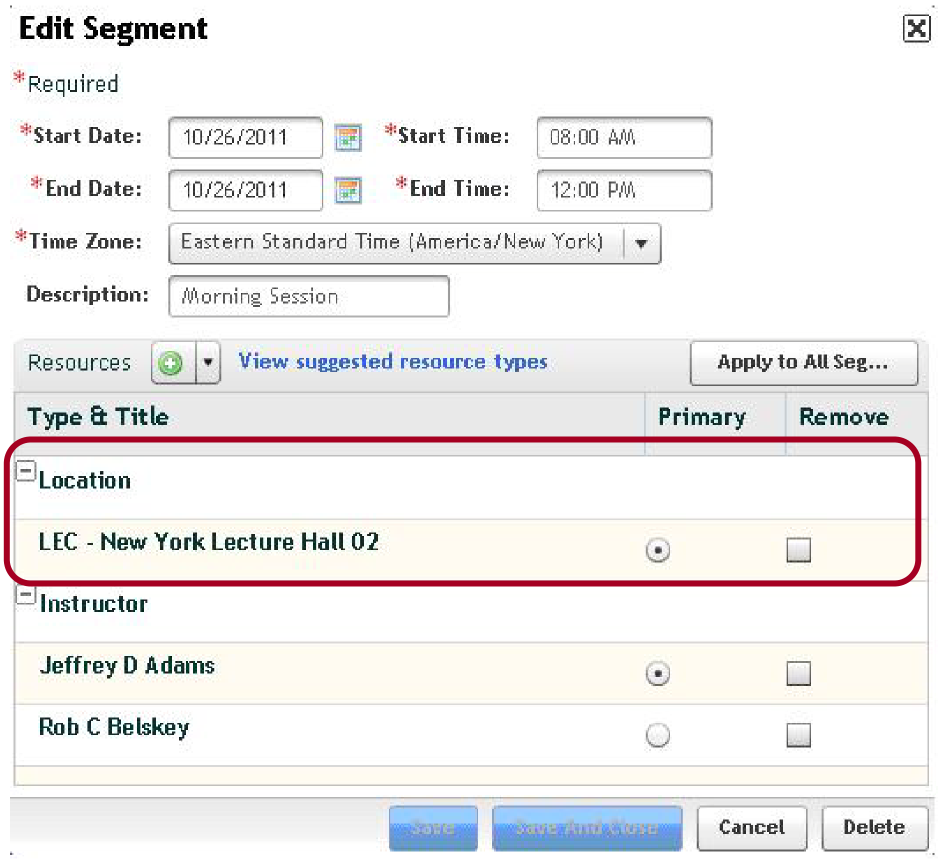


Figure 20: Segment – Primary Location

To assign locations to segments, click **Add Resources** ( ) and select **Add Location** from the drop-down menu. SATERN allows you to search the database for locations that match the type of location the item creator designated. Enter a location type if desired, or leave it blank, and SATERN returns all locations in the search results (Figure 21).

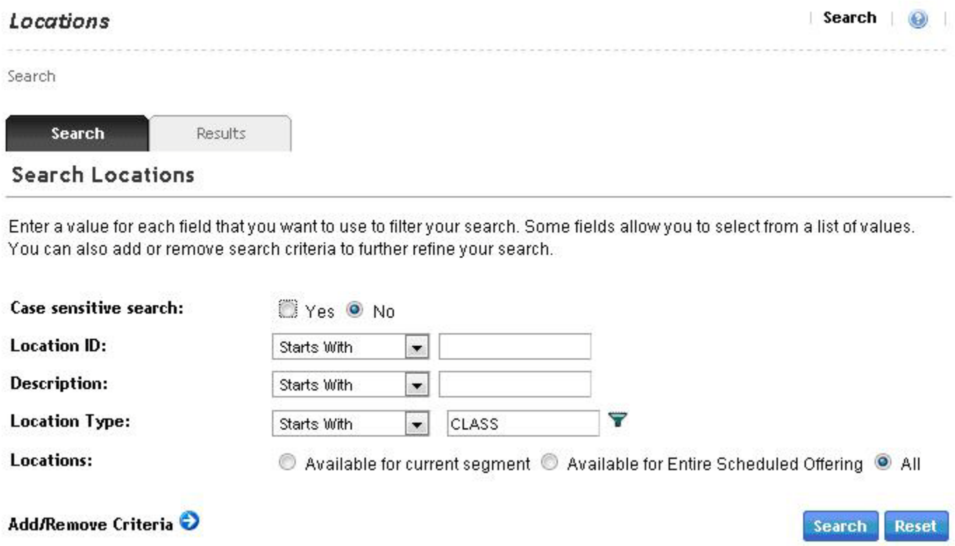


Figure 21: Location Search Window

Assigning Equipment

Equipment is any reusable resource that is used in the delivery of scheduled offerings. These include overhead projectors, television monitors, classroom laptops, etc. Equipment can be associated with locations and facilities. You may schedule equipment that does not come with the location that has been scheduled. To schedule these additional resources, click the **Add Resources** button for the segment in which you want to schedule them (Figure 22).

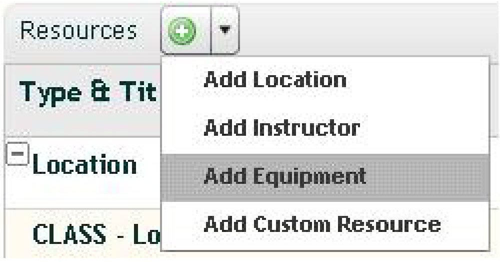


Figure 22: Add Equipment to Segment

Resource Conflicts

If you select a resource that is already scheduled for the same time in which you are trying to schedule it, a warning message displays. You can view the conflict and make a decision to continue and schedule that resource or search for and select another (Figure 23).

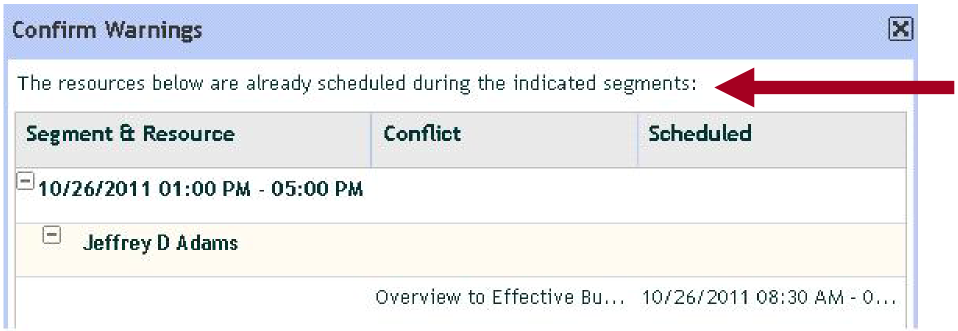


Figure 23: Resource Conflict Warning Message

Regardless of the view you are in (calendar view or list view), any resource conflicts are indicated by the **View Resource Conflicts** icon (⚠). Click this icon to view the conflicts.

Lab 2. Assigning Resources to Segments

Step

1. Navigate to Learning > Scheduled Offerings.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.
3. Click Search.
4. Click the scheduled offering ID link to access the scheduled offering in edit mode.
5. Select the Segments tab from the Related area.
6. In calendar view, double-click the segment in which you want to assign resources to.

***Note**: In list view, click the segment link.*

7. For the selected segment, select a primary instructor:
   a. Click Add Resources.
   b. Select Add Instructor.
   c. Click the corresponding checkbox to select the instructor to add for the segment.
   d. Click Add.
   e. Identify the primary instructor and click the corresponding radio button in the Primary column.
   f. Click Save.

***Note**: When searching for an instructor, the search screen defaults with the item information entered as search criterion. If you do not remove this criterion, SATERN returns only instructors who are authorized to teach this item.*

8. Select a primary location.
9. Click Save and Close.

***Note**: If there are multiple segments and one or more of the segments do not have a primary instructor and/or location designated, the system displays a warning pop-up box. Click OK to continue.*

Job Aid: Create Scheduled Offering

APPLY TO ALL SEGMENTS

In the associated resources area, you can add all of the resources that will be needed to deliver the segment. You can also click **Apply to All Segments** to copy the resources which you have added to the segment that you're modifying, to all other segments of the scheduled offering (Figure 24).

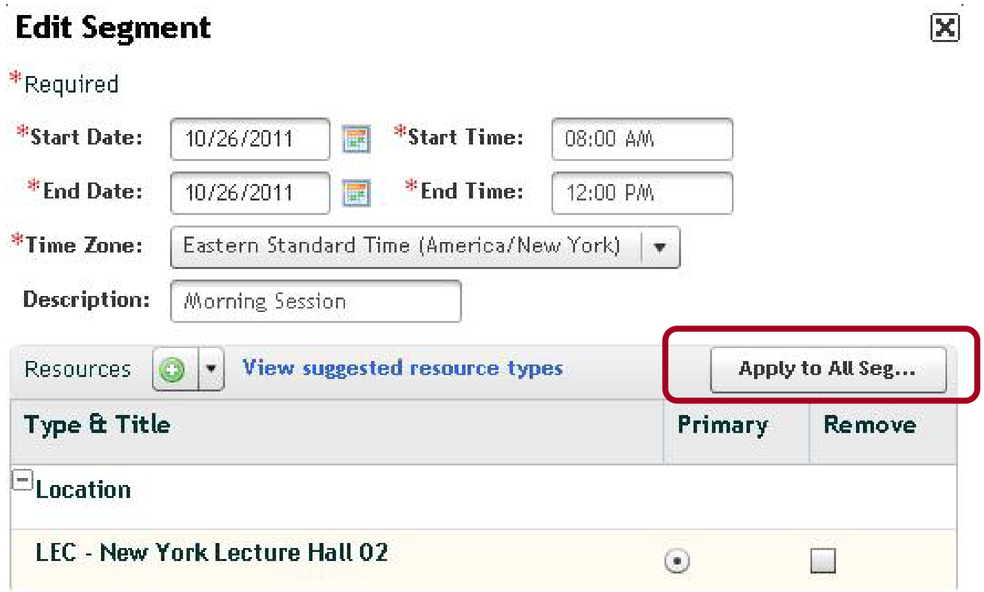


Figure 24: Apply to All Segments

If you're editing an existing segment, then you can click **View suggested resource types** to review the resources that are identified on the item record (**Learning > Items > Segments tab**) for the effective delivery of the scheduled offering.

Lab 3. Adding a Second Instructor to a Segment

Step

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1 and click **Search**.
3. Click the scheduled offering ID link to access the scheduled offering in edit mode.
4. Select the **Segments** tab from the Related area.
5. In calendar view, double-click the segment you want to add a second instructor.
6. Click **Add Resources** and select **Add Instructor** from the drop-down menu.
7. Click the corresponding checkbox to select the second instructor to add for the segment.
8. Click **Add**.
9. Identify the Primary instructor and click the corresponding radio button in the **Primary** column.
10. Click **Save**.
11. View all the instructors scheduled to teach during the segment. Note the primary instructor.
12. Click **Cancel** to return to the calendar or list view.

***Note**: If you did not click Save (step 10), then in step 12, click Save and Close (instead of Cancel) to save your changes and return to the segment calendar or list view.*

Job Aid: Create Scheduled Offering

ADDITIONAL SEGMENTS

Once a scheduled offering is created, you have the ability to add or remove segments from that scheduled offering. The default segment structure is established through the Segments tab of the item record.

You can add a new segment to the scheduled offering by either clicking the **Add New Segments** button (Figure 25) or by clicking the **Copy Segments** icon (Figure 26). The **Copy Segments** icon is only available in list view.

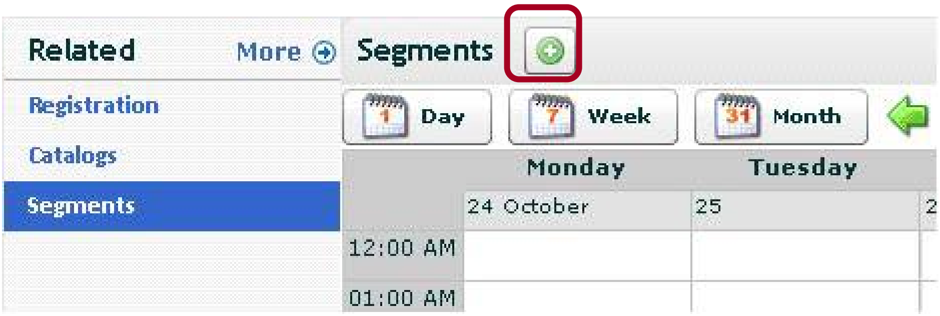


Figure 25: Add New Segment to the Scheduled Offering

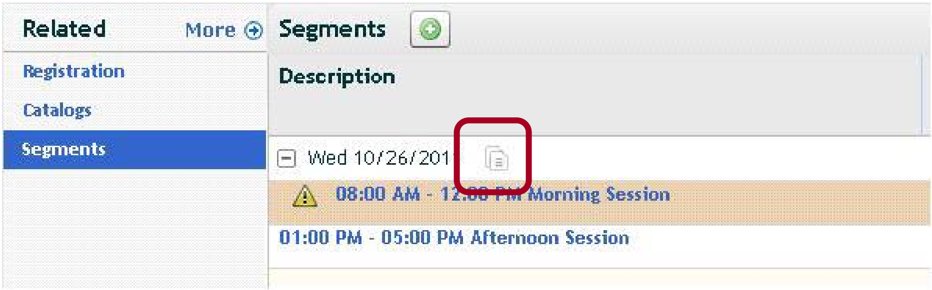


Figure 26: Copy Daily Segments

Lab 4. Adding Segments to a Scheduled Offering

Add a New Segment

Step

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.
3. Click **Search**.
4. Click the scheduled offering ID link to access the scheduled offering in edit mode.
5. Select the **Segments** tab from the Related area.
6. Click the **Add New Segments** button.
7. Enter the segment information:
   a. Start date and time
   b. End date and time
   c. Segment description (optional but recommended)
8. Click **Add Resources** to add instructors, locations, etc.
9. Click **Save** to save your changes and continue to modify the segment details, or click **Save and Close** to return to the **Segments** tab.

Copy Daily Segments

Step

1. Navigate to the segment you just created.
2. Click the **List View** icon.
3. Next to the segment just created, click the **Copy Segments** icon.

4. Enter the number of times to copy the segment.

***Note**: The system is actually copying all segments scheduled on the same date of the segment you selected, not just the segment you selected. This will create each duplicate segment(s) on a different day. You can modify the new segment dates, times, and time zones once they are created.*

5. Click **Copy**.

6. View the new segment(s).

***Note**: The resources assigned to the original segment are carried over to the new segment(s).*

7. Modify the description for each new segment.

8. Click **Save and Close**.

9. Change the end time of one of the new segments.

10. Click **Save and Close**.

Job Aid: Create Scheduled Offering

RECORD ATTENDANCE

Click the **Attendance** link in the **Actions** column for any segment of the scheduled offering. The **Record Attendance** window displays enabling you to record a learner's attendance for that segment (Figure 27).

***Note**: To include attendees who were not already enrolled, the attendee names must be entered in the registration tab, before recording attendance.*

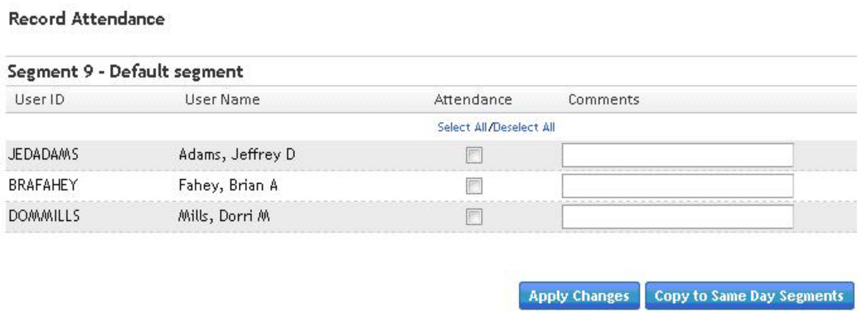


Figure 27: Record Attendance for Each Segment

Record the learner’s attendance by clicking the checkbox in the **Attendance** column. You can enter any comments for each learner as well. Click **Apply Changes** to save your record.

If the scheduled offering has multiple segments, click **Copy to Same Day Segments** to copy the attendance record and any comments for all learners from the current segment to all segments that start on the same day.

***Note**: Recording segment attendance is for administrative use only. The system does not store this attendance with the learner’s learning history.*

LESSON-RELATED REPORTS

The following report in SATERN relates to this lesson:

- Scheduled Offering Data

The Scheduled Offering Data report returns detailed information about each scheduled offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

CONCLUSION

In this lesson, you were introduced to key segment concepts, including assigning resources and adding additional segments to a scheduled offering. Using step-by-step instructions, you assigned instructors and locations to segments and added new segments to a scheduled offering.

You should now be able to:

- Modify segments of a scheduled offering
- Assign resources to a segment
- Record attendance for a specific segment

In the next lesson, you will learn how to set registration parameters and register learners for scheduled offerings.

LESSON CHECK

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

1. You have just become aware that the scheduled offering times and location have changed. What steps should you take to make the changes and inform all concerned parties?

2. List three types of resources that can be assigned to a segment:

3. True or false:

If you receive a conflict-warning message, you cannot schedule that resource for that specific time.

NOTES

Lesson3: Registration

Now that the scheduled offering is configured, you can register learners. In this lesson, you will learn the registration process to register learners for scheduled offerings.

OBJECTIVES

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

- Define the six registration statuses
- Set the registration parameters for a scheduled offering
- Register learners for a scheduled offering
- Use the Registration Assistant Tool
- Define and reserve slots for a scheduled offering
- Cancel a scheduled offering

REGISTRATION MAIN CONCEPTS

How a learner registers for a scheduled offering is determined on an offering-by-offering basis. If configured, learners may self register for scheduled offerings. Supervisors may also be given the ability to register subordinates. Otherwise, administrators must register learners in scheduled offerings. When learners are officially registered and have a status of *Enrolled*, the system is capable of generating email notifications and sending them to the learner, his/her immediate supervisor, the instructor, and any other contact associated with the offering; if the corresponding checkboxes are selected at the time of registering the learner.

A learner may have one of following SATERN defined registration statuses:

- **Enrolled**: The learner has a seat in the scheduled offering.
- **Waitlisted**: The learner is waiting for a seat to open. (If Auto Fill Registration is checked, SATERN automatically registers a waitlisted learner when another learner cancels/withdraws. SATERN prioritizes the waitlist as first one on the waitlist is the first registered into the offering.)
- **Cancelled**: The learner does not have a seat.
- **Pending**: System assigned for learners "pending" approval in a SATERN defined approval process.
- **No-Show**: In instances where a learner does not show up for training, the administrator needs to indicate this in SATERN since SATERN cannot know if the learner attended the training.
- **Walk-In**: In instances where a learner does not register in SATERN prior to the start of the training, but goes to the training and attends.

NASA Business Rule

If a learner does not show up for training, administrators shall change the learner's registration status from Enroll to No Show on the registration section of the scheduled offering prior to recording the learning event. This takes the learner off the roster for the scheduled offering and does not record a training completion to the learner's history.

REGISTRATION DETAILS

If a scheduled offering is made available for learner self-registration, an approval process may be specified. If so, the learner is registered with a Pending status until the approver(s) have allowed registration to continue. (See Multi-level Approvals guide). If approval is required, indicate in the core area which approval process should be used (select from the **Approval Process** drop-down menu) and if approval is required (select from **Approval Required** drop-down menu) (Figure 28).

Figure 28: Core Area: Approval Required

Click **View All** to display the **Additional Settings** window and scroll down to the **Registration** section to see the registration details for the scheduled offering (Figure 29).

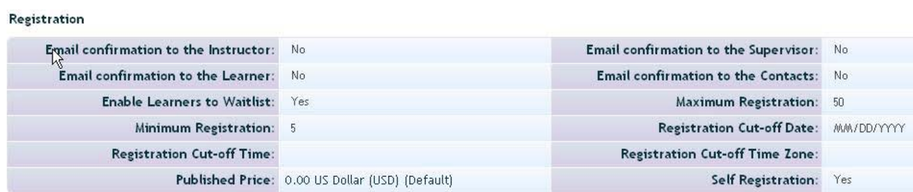


Figure 29: Scheduled Offering Registration Details

Set the **Auto Fill Registration** option to **Yes** to enable the system to automatically select and register the next learner on the waitlist should a registered learner withdraw (or be removed or cancelled by an admin). The learner who is listed first on the waitlist is registered first.

If learner self-registration is desired, set the **Self Registration** option to **Yes**.

***Note**: Learners can self-register only if the scheduled offering resides in a catalog that they have access to.*

NASA Business Rule

If self-registration is enabled, an approval process must be selected and activated.

Also in this section, you configure the minimum and maximum registrants. If self registration and waitlisting are enabled, learners attempting to register after the offering is full are prompted to register with a waitlist status. Administrators are warned but not prevented from exceeding the maximum registration threshold.

The registration cutoff date and time prevents learners from self-registering after the date and time has passed. You can still register learners after this date, but they receive a warning message.

Lab 5. Setting Registration Parameters

Step

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.
3. Click **Search**.
4. Click the scheduled offering ID link to access the scheduled offering in edit mode.
5. Click **View All** in the core area.
6. Scroll to the bottom of the **Additional Settings** window to the **Registration** section.
7. Set the **Enable Learners to Waitlist** option to **Yes**.
8. Enter a registration cut-off date.
9. Enter a registration cut-off time.
10. Enter the minimum registrations.
11. Enter the maximum registrations.
12. Set the **Self Registration** option to **Yes**.

    ***Note**: Setting this option to **Yes** allows learners to register for this scheduled offering from the learner interface if the item and scheduled offering are in his/her catalog.*

13. Click **Save**.

Job Aid: Registration Management

REGISTERING LEARNERS

Once it is determined that a learner needs to attend a scheduled offering of an item, the admin has the ability to register him/her for the offering (Figure 30)

Figure 30: Related Area of Scheduled Offering Record: Registration

Click the **Add To Registration** Menu button (Figure 31). You may search for learners using any learner search criteria, or select learners from the request list for the scheduled item. A request list is available if the admin enabled learner requests for the item. It is recommended that you check the request list to see if learners have requested to be registered for an offering of the item.

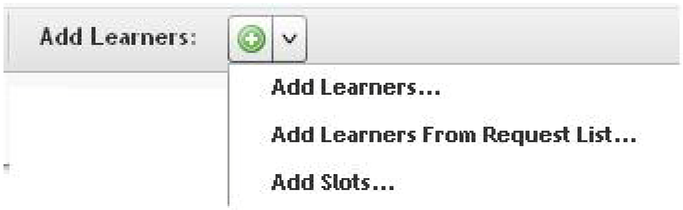


Figure 31: Add to Registration Menu Button and Options

When adding learners to the registration of a scheduled offering, email confirmation checkboxes may be checked in order to notify the learner, instructor, supervisor, and any contacts listed on the Contacts tab. Click on the **Settings** button (Figure 32).

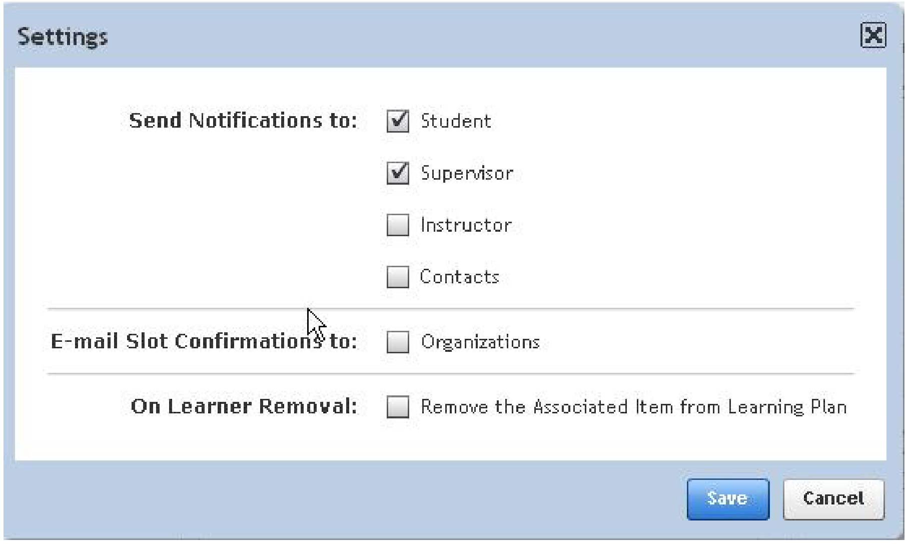


Figure 32: Scheduled Offering Settings

The default settings of these checkboxes may be configured globally in **System Admin > Configuration > Registration Settings**. These checkboxes are also available when you withdraw (remove), waitlist, or cancel a learner from the registration.

Record Attendance

If attendance is recorded for a segment on the Segments tab (as introduced in Record Attendance on page 40) it will display in the hover window for the registered learner. Segment Attendance displays the total segments attended for each enrolled learner based on the attendance recorded previously on the segments tab. For example, in Figure 33, the student, Virginia, has attended zero segments.

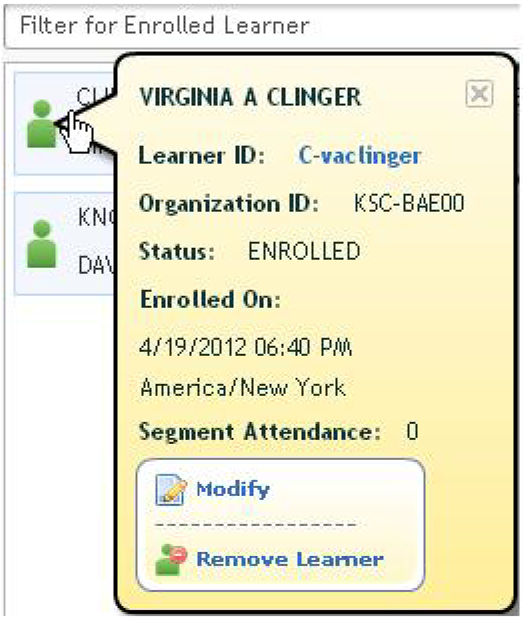


Figure 33: Segment Attendance

Lab 6. Registering Learners for a Scheduled Offering

Step

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.
3. Click **Search**.
4. Click the scheduled offering ID link to access the record in edit mode.
5. Select the **Registration** tab from the Related area.
6. Click **Add To Registration** Menu.
7. Select **Add Learners** from the drop-down menu.
8. Enter search criteria to search for learners to register for the offering.
9. Click **Search**.
10. Click the **Add** checkbox next to each learner you want to register.
11. Check the appropriate Email confirmations to: checkboxes for those you want to receive confirmation for this offering (these are at the bottom of the search results page).

__Note__: It is recommended that you check all boxes. Instructors and supervisors will get one e-mail notification. Supervisors only receive subordinates' names in the e-mail, while instructors receive everyone registered in the offering.

12. Click **Add**.
13. View the learners who are registered for the offering. Scroll your mouse over each learner card to view enrollment details.

Job Aid: Registration Management

WORKING WITH SLOTS

When an organization requests seats in a scheduled offering but cannot provide the names of the individuals who will attend, the admin can use the slots feature of SATERN. Slots allow the admin to reserve seats in a scheduled offering without having to register specific learners.

Slots are reserved for organizations, enabling only learners who belong to the organization to self-register in the slot (if self registration is enabled). If the offering is full, but slots are remaining, learners who are not a member of the organization may only join the registration as waitlisted (Figure 34). Admins can register any learner against a reserved slot.

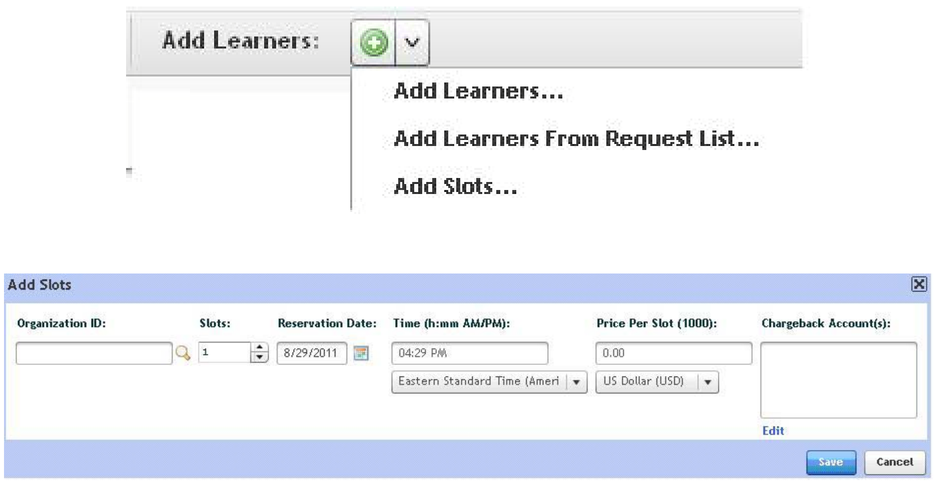


Figure 34: Add Slots

Click the **Add To Registration** Menu button and select **Add Slots** from the drop-down menu. Once slots are reserved, the number of open seats decreases by that number. For example, if there are 15 seats available in the class and the admin reserves three slots, 12 seats remain available for other learners.

Lab 7. Reserving Slots for a Scheduled Offering

Step

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.
3. Click **Search**.
4. Click the **Scheduled Offering ID** link to access the record in edit mode.
5. Select the **Registration** tab from the Related area.
6. Click **Add To Registration** Menu.
7. Select **Add Slots** from the drop-down menu.
8. Select an organization for which to reserve the slots.
9. Enter the number of slots to be reserved for the organization.
10. Enter the reservation date (defaults to current date).
11. Enter the reservation time (defaults to current time).
12. Click **Save**.

Job Aid: Registration Management

REGISTRATION ASSISTANT

The Registration Assistant is a tool that helps streamline the process of registering learners from the admin side of SATERN. Using the assistant, administrators may register learners, withdraw learners, or reserve slots for an organization’s learners. Navigate to **Learning > Tools > Registration Assistant** to access the tool.

This tool can be useful for administrators who have the responsibility of registering learners for offerings but don’t have any setup or maintenance responsibilities of the offering itself (Figure 35).

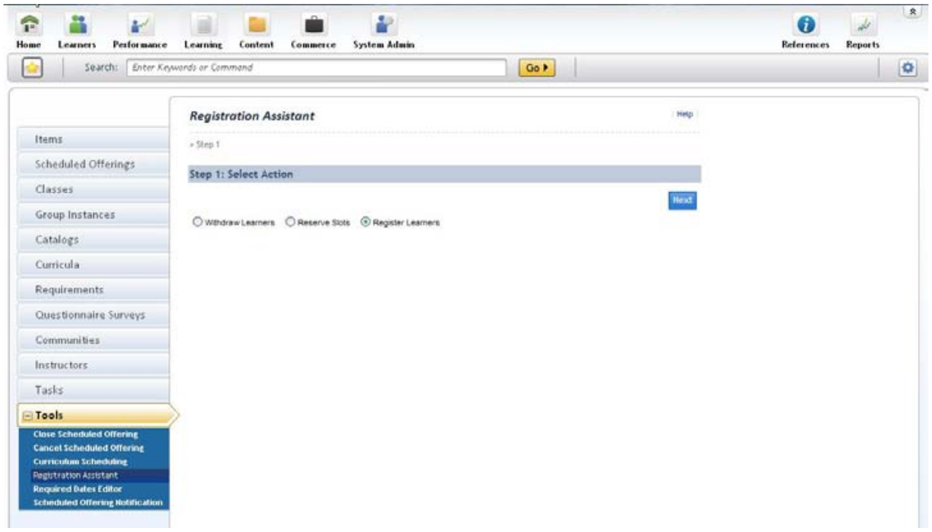


Figure 35: Learning > Tools> Registration Assistant

Job Aid: Registration Assistant Tool

SATERN ROSTERS FOR VERIFICATION

A SATERN roster includes the printed name of the employees registered and provides a place for their signature. This form allows administrators to clearly see who is registered and who did or did not sign in for the class. Therefore the following business rule is recommended.

NASA Business Rule

For scheduled offerings in SATERN, the Center Training Office should use only SATERN rosters for sign-in and attendance verification, and should send only SATERN generated rosters to the NSSC for course close-out process. The NSSC shall only accept SATERN rosters.

CANCELING A SCHEDULED OFFERING

If a scheduled offering that has been created cannot be delivered, the admin may choose to cancel it. This process allows the admin to move any learners who are registered with an *Enrolled*, *Waitlisted*, or *Pending* registration status to the request list for the item. Any incurred costs associated with the scheduled offering being cancelled can also be calculated. Cancelled scheduled offerings that were previously available to learners for self registration are no longer available. Click **Cancel the Scheduled Offering** in the Actions area of the scheduled offering record, or navigate to **Learning > Tools > Cancel Scheduled Offering** (Figure 36).

Figure 36: Cancel Scheduled Offering Wizard

Lab 8. Canceling a Scheduled Offering

Step

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.
3. Click **Search**.
4. Click the scheduled offering ID link to access the record in edit mode.
5. In the **Actions** area, click **Cancel the Scheduled Offering**.
6. Leave the default cancellation date and click **Next**.
7. Click **Next** without making changes.

Note*: There are no costs required for this lab.*

8. On the Post Cancellation Action Settings page, check the appropriate checkboxes to add registered learners to the item request list, send email notifications, and/or inactivate the scheduled offering.
9. Click **Next**.
10. On the **Confirmation** screen, click **Finish**.

LESSON-RELATED REPORTS

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

- Scheduled Offering Data

The Scheduled Offering Detail report returns detailed information about each scheduled offering including the item scheduled, dates scheduled, registration and waitlist data, instructor data, segment data, and delivery costs.

- Registration Status

The Registration Status report returns, for offerings and learners selected a detailed list of registration information including registration dates and times, enrollment numbers, instructors, scheduled offering details, and contact information. This report can be configured to include any of the Registration Statuses (Registered, Canceled, Waitlisted, and Pending).

- Class Roster and Class Roster Verification

These reports return the roster of learners in a scheduled offering.

- Slot Status

The Slot Status report returns, for organizations and scheduled offerings, the current status of any slots that have been purchased. Where learner names have been identified to fill the slots, the learner names are included in the report, along with registration status and schedule information. You can group the report by organization or scheduled offering.

CONCLUSION

In this lesson, you were introduced to registration concepts for scheduled offerings. Using the step-by-step instructions, you learned how to set up the registration parameters, register learners for scheduled offerings, and use slots to reserve seats for a scheduled offering. Finally, you learned how to cancel a scheduled offering.

You should now be able to:

- Define the six registration statuses
- Set the registration parameters for a scheduled offering
- Register learners for a scheduled offering
- Use the Registration Assistant Tool
- Define and reserve slots for a scheduled offering
- Cancel a scheduled offering

LESSON CHECK

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

1. True or false:

All of the learner registration options on a scheduled offering are determined within the Registration tab.

2. What are the registration options available to the admin?

3. True or false:

You can reserve slots for learners who work in a specific job location.

Activity

Your boss has given you the following task:

- We forgot to create and register learners for the item X course that you took last week.
- Create a scheduled offering for 7 days ago and register yourself and four other learners.
- Record the scheduled offering ID.

NOTES

Lesson 4: Record Learning Events

After the scheduled offering is complete, you must record learning events for all the participants. In this lesson, you will learn how to record learning events. Recording a learning event creates a Learning History (Completed Work) record for learners and allows those learners who successfully complete an item to generate a certificate of completion.

OBJECTIVES

Upon completion this lesson, you will be able to:

- Define a learning event
- Record a learning event for a scheduled offering

LEARNING EVENT MAIN CONCEPTS

When you are informed that training has been completed, you can use Record Learning Event to capture this information. Once the event is recorded, a Learning History (Completed Work for learners) record is created that captures the item completed, the date/time it was completed, and the status the learner was given. If an error is recorded, you have the ability to edit it with the Learning Event Editor (if you have been given the appropriate workflow).

A learning event is the record of:

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

- A record of attendance or completion of any external event considered important enough to document (but not related directly to learning needs)

Using **Record Learning Event**, you may choose to record completions for all learners registered in a selected scheduled offering. The system does not prevent you from recording completions for those learners who were never registered. This is useful for those last minute registrants who were not actually registered in the scheduled offering but did attend. However, it is recommended for you to register learners (reconcile the roster) in the scheduled offering even after the delivery date has passed, for reporting purposes.

TYPES OF LEARNING EVENTS

There are two types of learning events in SATERN:

- Item-based events
- External events

Item-based Events

Scheduled offerings are instances of items placed on a calendar, and therefore recording a learning event for a scheduled offering grants the learner a completion status for the item. The benefit for recording against scheduled offerings is immediate access to the list of all learners who were registered in the course, eliminating the need to search.

External Events

An external event is a learning activity, such as a college course or a seminar outside of the organization, for which there is no item record in SATERN and may be recorded in a learner's Learning History. This external event has a description and comment field to further identify the nature of the training.

DATA RECORDED IN A LEARNING EVENT

Recording a learning event captures data such as:

- Learner information
- Item title
- Item status (grade or code)
- Completion date/time
- Completion status code (indicates whether or not an item was successfully completed)

Completion status codes may include, but are not limited to, the following list:

- Completed
- Substituted
- Incomplete
- Archived Completed

ACCESS RECORD LEARNING TOOLS

There is one recording tool: Record Learning Event. It is used to indicate that Learners have completed (or not) a Scheduled Offering.

- Navigate to **Learners > Tools > Record Learning Event** (Figure 37).

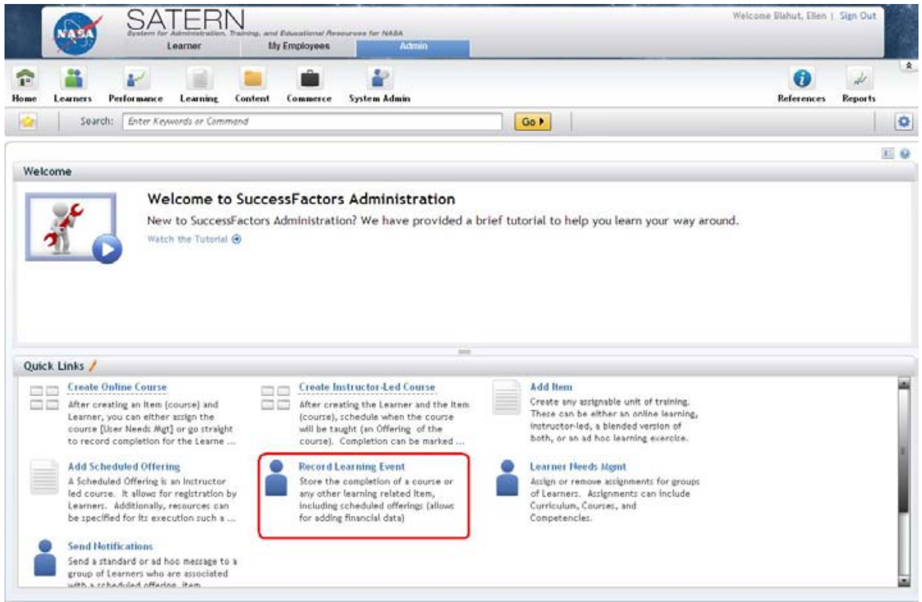


Figure 37: Record Learning Event

Lab 9. Record a Learning Event for a Scheduled Offering

Step

1. Navigate to **Learners > Tools > Record Learning Event**.
2. Click the **Scheduled Offering** radio button.
3. Click **Next**
4. Enter the **Scheduled Offering ID** in the textbox or search for scheduled offering.
5. Click **Next**.
6. Fill in all of the required data fields (*). Additional information such as total hours, or credit hours, can be entered as well.
7. Click **Next**.
8. To add learners, enter a Learner ID or Click **add one or more from list** to search for and select learners.
9. Click **Next**.
10. Select an option in the **Status** drop-down menu to adjust a learner's status.
11. Optional: Enter comments or grade.
12. Click **Next**.
13. Click **Next**.

    Note*: There are no costs associated with this lab*

14. If competencies need to be assessed as a result of recording the learning event, select the Automatically Assess Related Competencies checkbox.
15. Review learning event information.
16. Click **Finish**.

17. A pop-up may appear requesting that the page refresh before you proceed. Click **OK**.
18. The status is displayed.
19. Optional: Click **Print** to print a completion certificate report for each learner listed.
20. Optional: Click **Email**… to email a completion certificate report to each learner listed.
21. Optional: Click **Start Over**… to begin the **Learning Event Recorder** process again. This retains all learners previously selected.

LEARNING HISTORY

The Learning History tab from the Related area of the learner record is made up of all learning events that have been recorded, either for credit or not for credit. You are able to view (but not change or edit) a learner’s history from the Learning History tab of the learner record (Figure 38).

Figure 38: 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 on the Learning Plan tab with the new date for completion and on the Learning History tab with the date completed.

Certificate of Completion

A learner and his/her training managers can print certificates upon the learner’s successful completion of an item. Certificates are generated in **.pdf** format and open in Acrobat Reader. Certificates are not generated within SATERN for external events.

LEARNING EVENT EDITOR

Learning events can be edited and files may be attached to the record with the Learning Event Editor tool found under the **Learners > Tools** menu. Admins with the appropriate workflows have the ability to edit or delete the learning event records for learners.

An attachment framework is used to provide you with the ability 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 MS Word document using other means) and attached to the learning history record using the Learning Event Editor tool for future reference.

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 39), you can browse for a file to attach to the record. It is recommended that you enter a description to more easily identify each file (you cannot modify a description after you upload the file).

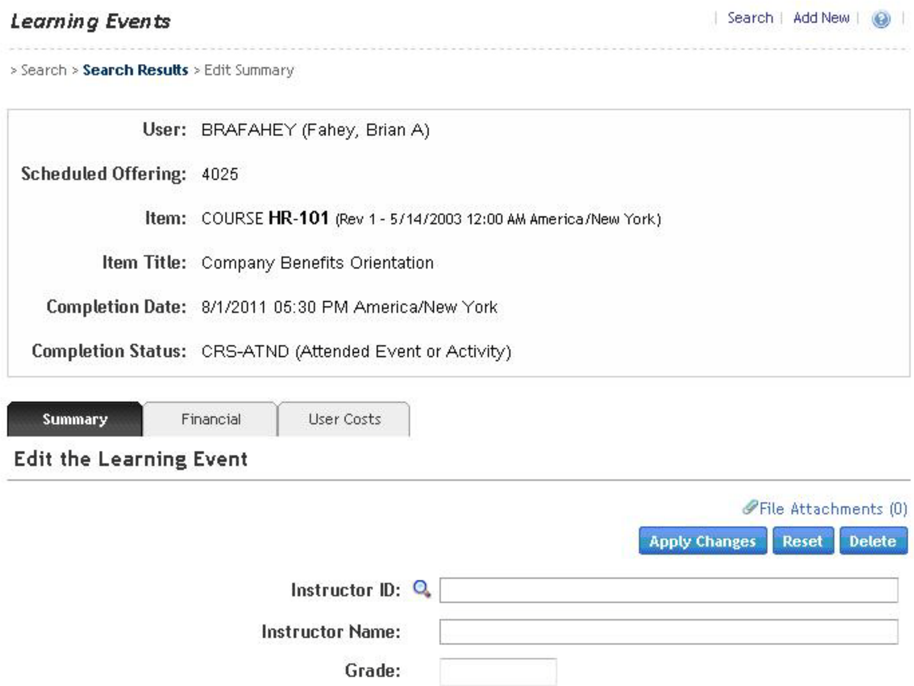


Figure 39: Learning Event Record

If you attempt to attach a file that is of an unsupported type, a validation error displays. If you attempt to attach a file that is larger in size than allowable, another similar validation error displays. These limitations are configured by your system administrator.

Learners can access attached files in the learner interface by reviewing the Learning History details of the recorded item (Figure 40).

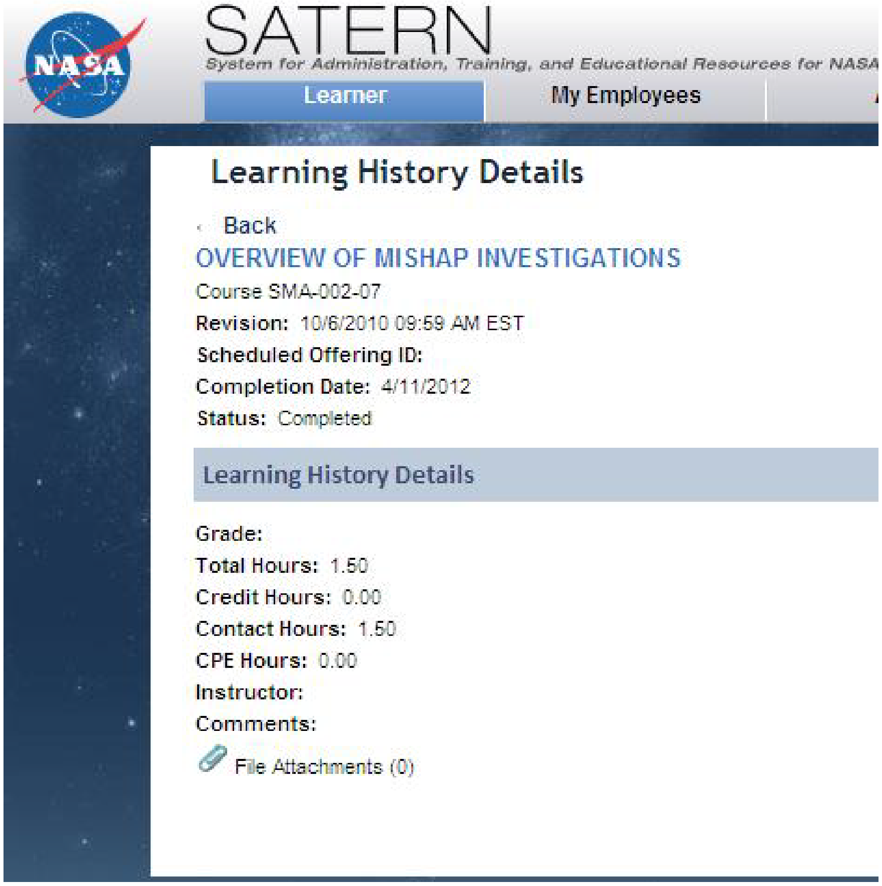


Figure 40: Learner-side Learning History > Item Details

Administrators can access the attached files in SATERN from the Learning History Details page of the learner record (navigate to the Learning History tab from the Related area of the learner record and click the View Details link) (Figure 41).

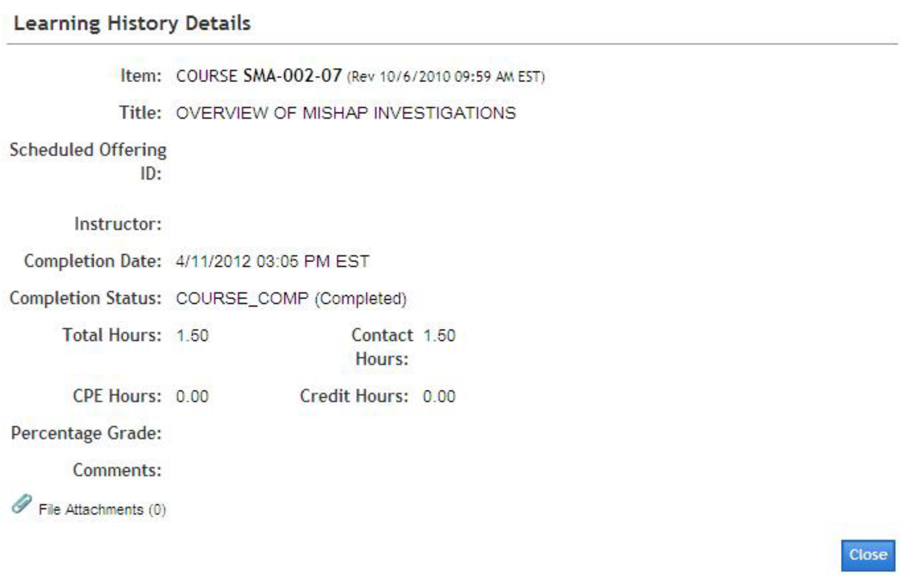


Figure 41: Learning History Details: File Attachments Link

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.

- Certificate of Completion for Scheduled Offerings

The Certificate of Completion report prints the certificates of completion for learners from their learning history.

- Item Status

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

CONCLUSION

In this lesson, you recorded learning events for learners using Record Learning Event. Using the step-by-step instructions, you recorded completed items.

You should now be able to:

- Define a learning event
- Record a learning event for a scheduled offering

In the next lesson, you will learn about copying scheduled offerings.

LESSON CHECK

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

1. What data can be recorded in a learning event?
   a. Completion date and status
   b. Learner information
   c. Item information
   d. All of the above

2. True or false:

Admins cannot record learning events for learners who were not registered in the scheduled offering originally.

NOTES

Lesson 5: Copying Scheduled Offerings

It can take a long time to set up scheduled offerings one by one. Copying allows you to copy scheduled offerings and assign resource to one or more future dates.

OBJECTIVES

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

- Describe the scheduled offering copying options
- Copy a scheduled offering

COPYING A SCHEDULED OFFERING

Sometimes items are scheduled to be delivered multiple times. After the original scheduled offering is created, the copy feature allows you to create duplicates, complete with associated resources and registration parameters. These copies of the original offering can be scheduled to occur once or repeat according to specific scheduling rules. These rules include copying multiple times every ‘x’ number of days, weeks, or months, and can be configured to end after a certain number of scheduled offerings have been created (Figure 42).

Go to scheduled offering from previous lab.

Click **Copy** in the **Actions** area of the scheduled offering record.

Figure 42: Copy Scheduled Offering

Figure 43 shows available options for creating a single copy of the scheduled offering.

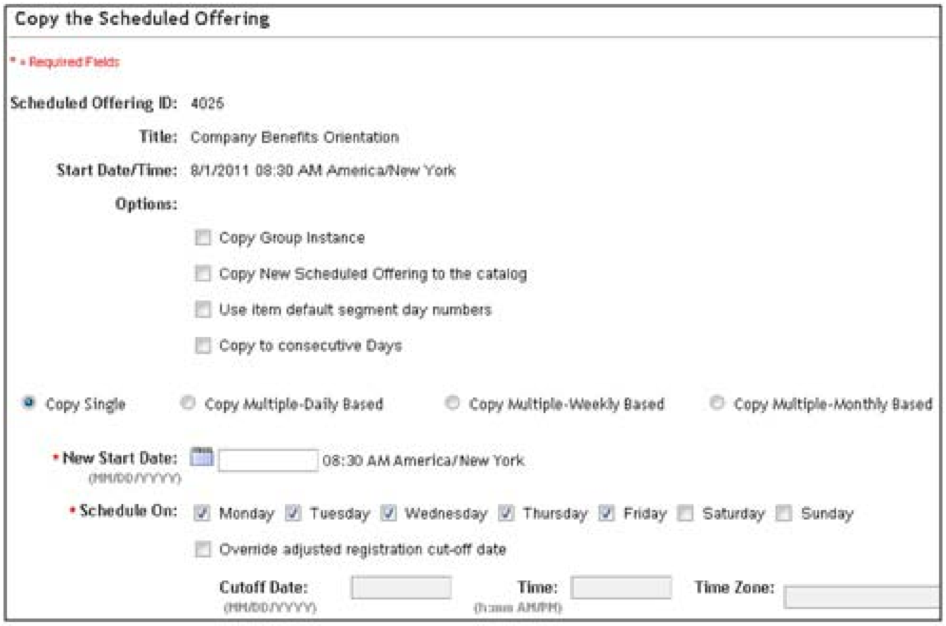


Figure 43: Options for ‘Copy Single’

Figure 44 shows available options for creating multiple copies of the scheduled offering to be held daily.

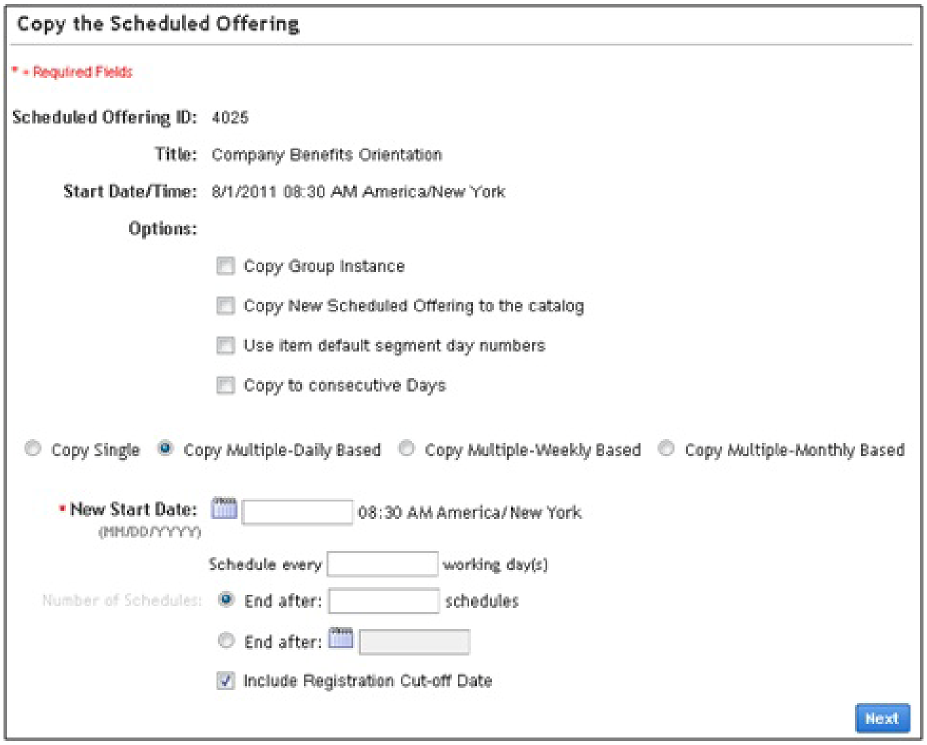


Figure 44: Options for ‘Copy Multiple-Daily Based’

Figure 45 shows available options for creating multiple copies of the scheduled offering to be held weekly.

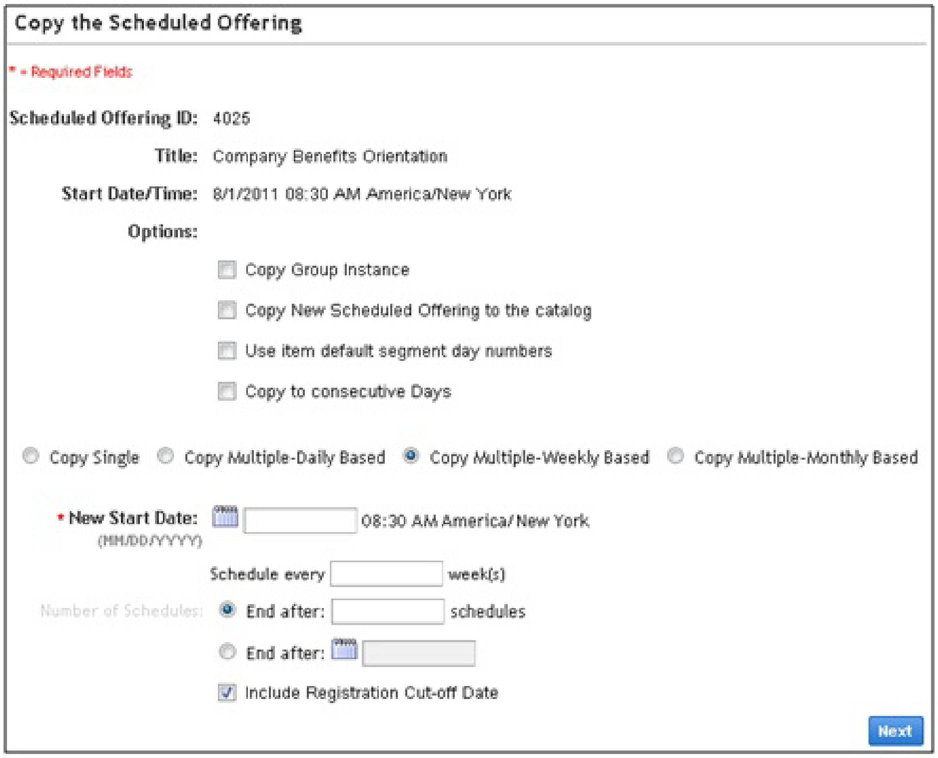


Figure 45: Options for 'Copy Multiple-Weekly Based'

Figure 46 shows available options for creating multiple copies of the scheduled offering to be held monthly.

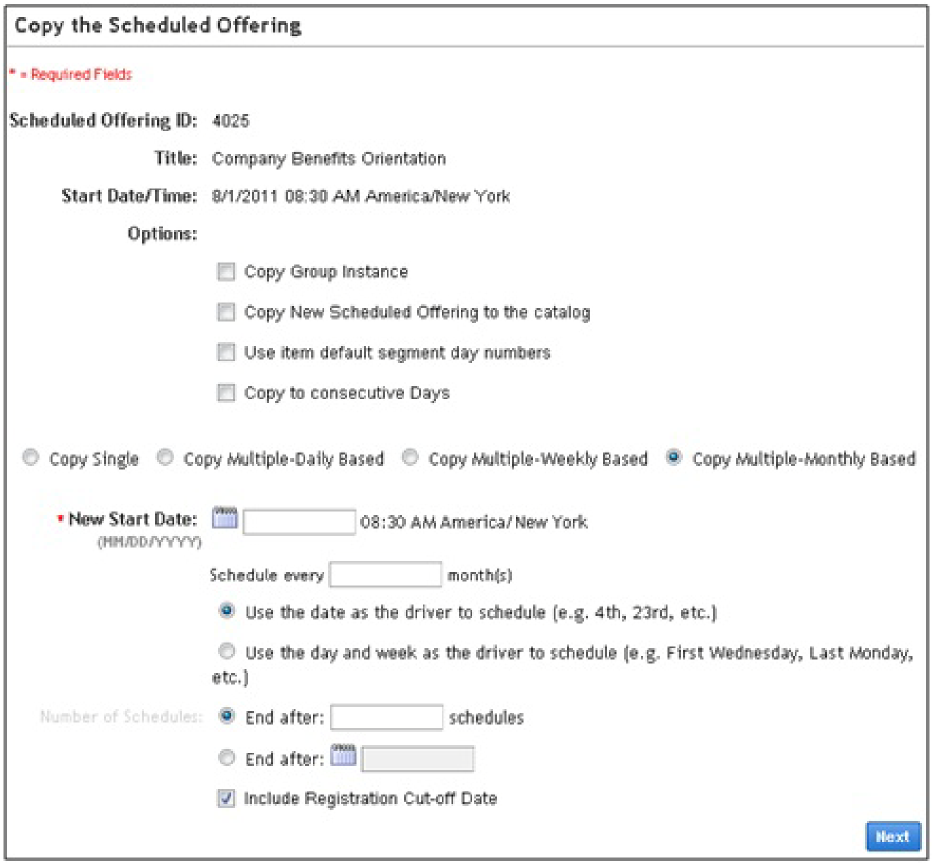


Figure 46: Options for 'Copy Multiple-Monthly Based'

Lab 10. Copy a Scheduled Offering (Multiple–Weekly Based)

Step

1. Navigate to **Learning > Scheduled Offerings**.
2. Enter search criteria to search for and locate the scheduled offering created in Lab 1.
3. Click **Search**.
4. Click the scheduled offering ID link to access the record in edit mode.
5. Click **Copy** from the **Actions** area.
6. Select the **Copy Multiple–Weekly Based** radio button.
7. Enter a new start date in the **New Start Date** textbox.

__Note__: Your instructor may direct you to use a date in the past so that one of your copies may be used in a future lab.

8. Enter **1** in the **Schedule every ___ week(s)** field.

__Note__: The system schedules a new offering every week.

9. Select the **End after ___ schedules** radio button.
10. Enter **2** in this field.

__Note__: This allows only two new offerings to be scheduled.

11. Check the **Include Registration Cut-off Date** checkbox.
12. Click **Next**.
13. On the **Confirmation** screen, check the **Send Notification** checkbox.

***Note**: The system sends emails to the contacts listed on the original scheduled offering record.*

14. Click **Copy**. Note the new scheduled offering IDs and start dates.

15. Click **Okay**

CONCLUSION

In this lesson, you created copies of a scheduled offering using different copy methods (e.g., daily, weekly, and monthly).

You should now be able to:

- Describe the scheduled offering copying options
- Copy a scheduled offering

LESSON CHECK

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

1. List the different ways you can copy scheduled offerings.

COURSE SUMMARY

Through lecture, activities, and hands-on computer lab work, this course taught you the concepts and terminology associated with scheduling instructor-led items in SATERN. You gained basic, hands-on experience using SATERN system functions to schedule items and assign resources.

You should now be able to:

- Describe the process for creating a scheduled offering
- Create a scheduled offering
- Assign resources to a segment within a scheduled offering
- Register learners for a scheduled offering
- Reserve slots in a scheduled offering
- Record learning events
- Copy scheduled offerings

NOTES

Scheduling Management Extras

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

- Additional tabs
- Creating resource records
- Closing scheduled offerings
- Working with classes
- Scheduling curriculum

ADDITIONAL TABS

Additional tabs from the Related area of the scheduled offering record include:

- Contacts
- Materials
- Notifications

Go to Scheduled Offering from previous lab

Click **More** to see these additional tabs (Figure 47).

Figure 47: Related Area of Scheduled Offering Record: More Tabs

Contacts Tab

The Contacts tab allows you to identify people who should or want to be notified about registrations for this specific scheduled offering. Use either an instructor or learner ID. The selected records must have an e-mail address in the record. When **Other** is checked on the Registration tab when modifying the segment information or registration statuses of learners, all contacts associated to this scheduled offering receive a notification (Figure 48).

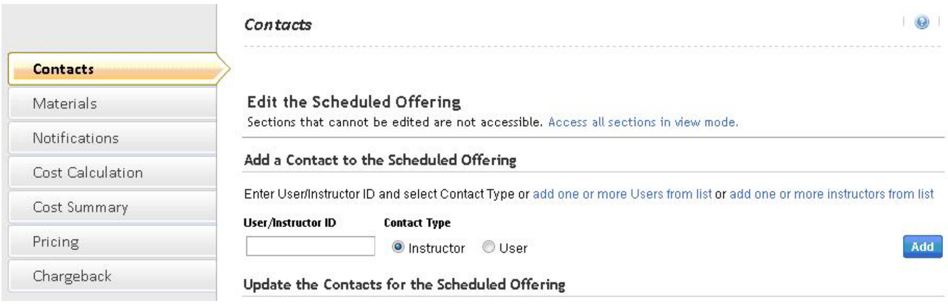


Figure 48: Scheduled Offering Record: Contacts Tab

Materials Tab

The Materials tab allows you to assign materials and designate it as pre or post work for learners or instructors. Material records listed here are not seen by learners and is not included into scheduled offering cost (Figure 49). Use of this tab requires a learner to enter a shipping address when registering if that information is not contained in his/her learner record.

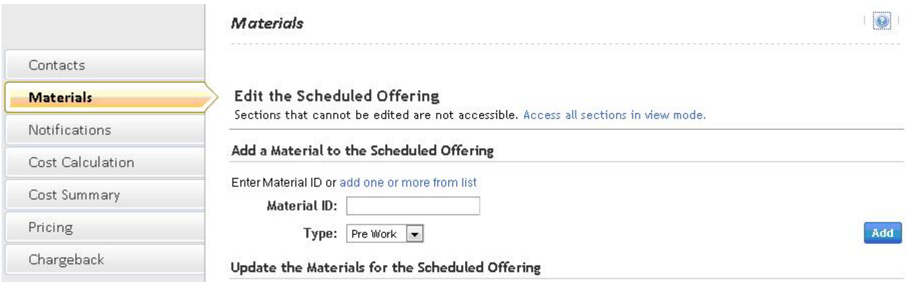


Figure 49: Materials Tab: Scheduled Offering Record

Notifications Tab

The Notifications tab allows you to create a specific message or attach a file to registration status emails for this specific scheduled offering. If the scheduled offering notification is not modified, the item notification defaults are sent to learners, instructors, supervisors, and contacts, if these checkboxes are checked (Figure 50).

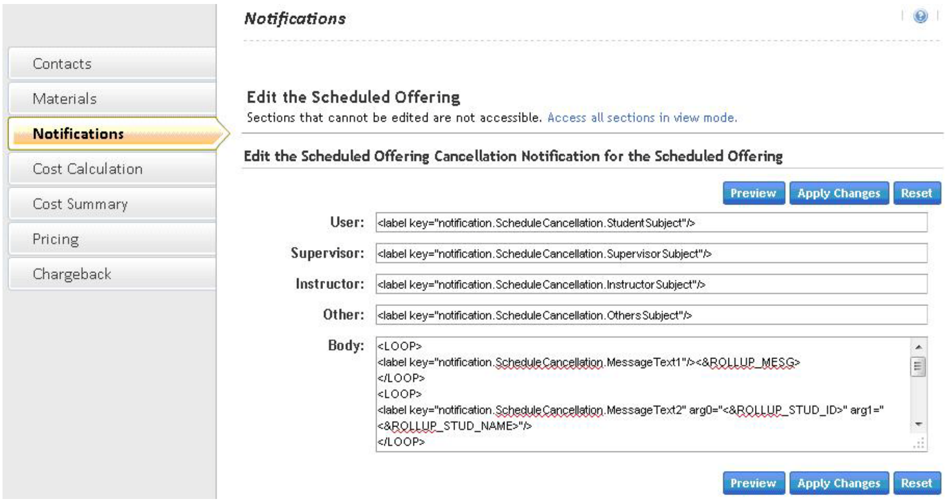


Figure 50: Notifications Tab: Scheduled Offering Record

Lab 11. Modify an Offering Notification

Step

1. Select the **Notifications** tab.
2. Scroll down to the **Edit the Registration Notification** for the Scheduled Offering section.
3. In the body of the message, add the following text:

   Please bring a Photo ID and notepad to class.
4. Click **Apply Changes**.

RESOURCES

You can set up scheduled offering resources in SATERN. Resources include:

- Instructors
- Equipment
- Equipment Status
- Equipment Types
- Materials
- Facilities
- Locations
- Location Types
- Custom Resources

Instructors

Instructors can be internal or external to the organization and are not required to be SATERN LMS Learners or admins. An instructor record can be associated to a learner record, and vice-versa. When creating a new instructor, you may select a related learner record to be tied to the instructor record, and from a learner record, you may select a related instructor to be tied to the learner (Figure 51).

The instructor's email address field is necessary for system-generated notifications when instructors are added as resources to scheduled offering segments. In addition, when learners are registered to take the scheduled offering for which the instructor is a resource, the instructor can receive email notification of the roster update.

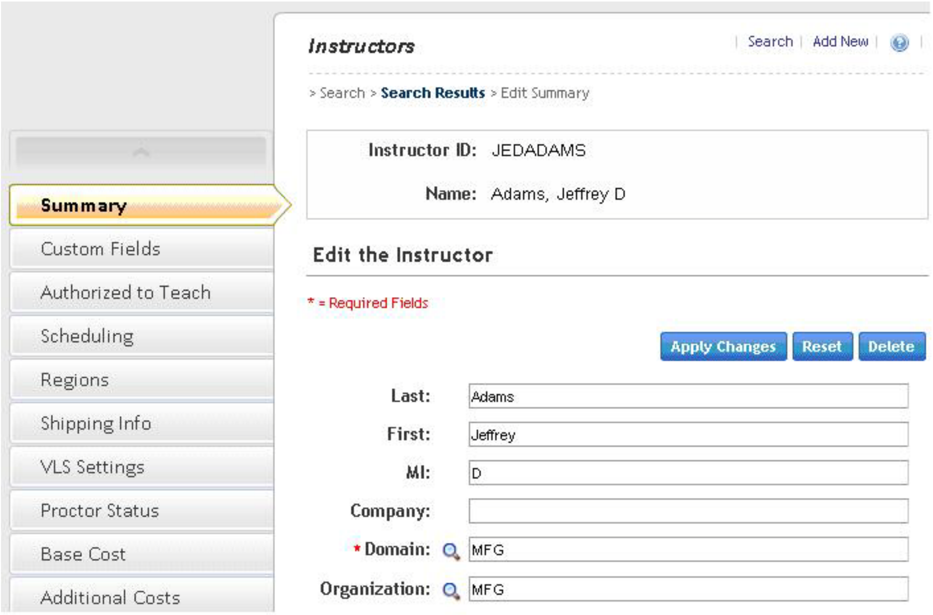


Figure 51: Instructor Record

The instructor record includes an **Authorized to Teach** tab, which lists items the instructor is authorized to teach. When searching for an instructor to add to a scheduled offering, the search initially filters for instructors who are authorized to teach the scheduled item. You can also add authorized instructors on the **Item > Instructors** tab.

Lab 12. Create and Authorize an Instructor

Create an Instructor

Step

1. Navigate to **Learning > Instructors**.
2. Click **Add New**.
3. Enter an instructor ID.
4. Enter the instructor's last name, first name, and middle initial.
5. Enter the instructor's company.
6. Select a domain for the instructor.
7. Select an organization for the instructor.
8. Select a time zone for the instructor from the **Time Zone** drop-down menu.
9. Enter an e-mail address for the instructor.

> ***Note****: Even though this field is optional, it is recommended that you enter an e-mail address so that the instructor receives all scheduled offering notifications.*

10. Verify that the **Active** checkbox is checked.
11. Select **Related Learner**, if applicable.
12. Click **Add**.

Job Aid: Resource Management

Authorize an Instructor to Teach Item

Step

1. From within the instructor record, select the **Authorized to Teach** tab.
2. Click the **add one or more from list** link.
3. Enter keyword to search for the item(s) you want to add to the instructor's authorized list.
4. Click **Search**.
5. Click the **Add** checkbox next to all items to be added to the instructor's authorized list.
6. Click **Add**.
7. Verify that all selected items are added to the instructor's record.

Equipment

SATERN allows you to manage the use of equipment for learning activities in your organization. Equipment is any reusable resource that is used in the delivery of scheduled offerings. Navigate to **References > Physical Resources > Equipment** (Figure 52).

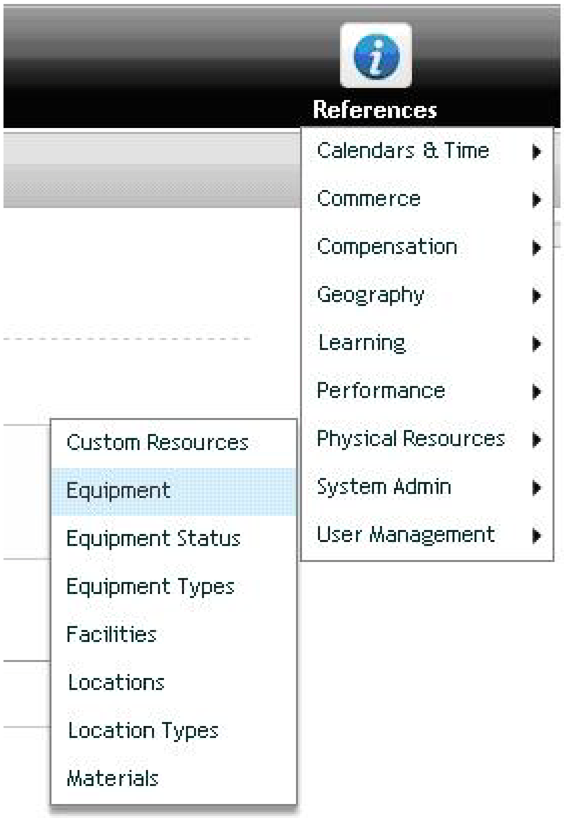


Figure 52: References > Physical Resources > Equipment

Examples of equipment include audio components, overhead projectors, DVD players, computer monitors, etc. Equipment can be associated with locations and facilities (Figure 53).

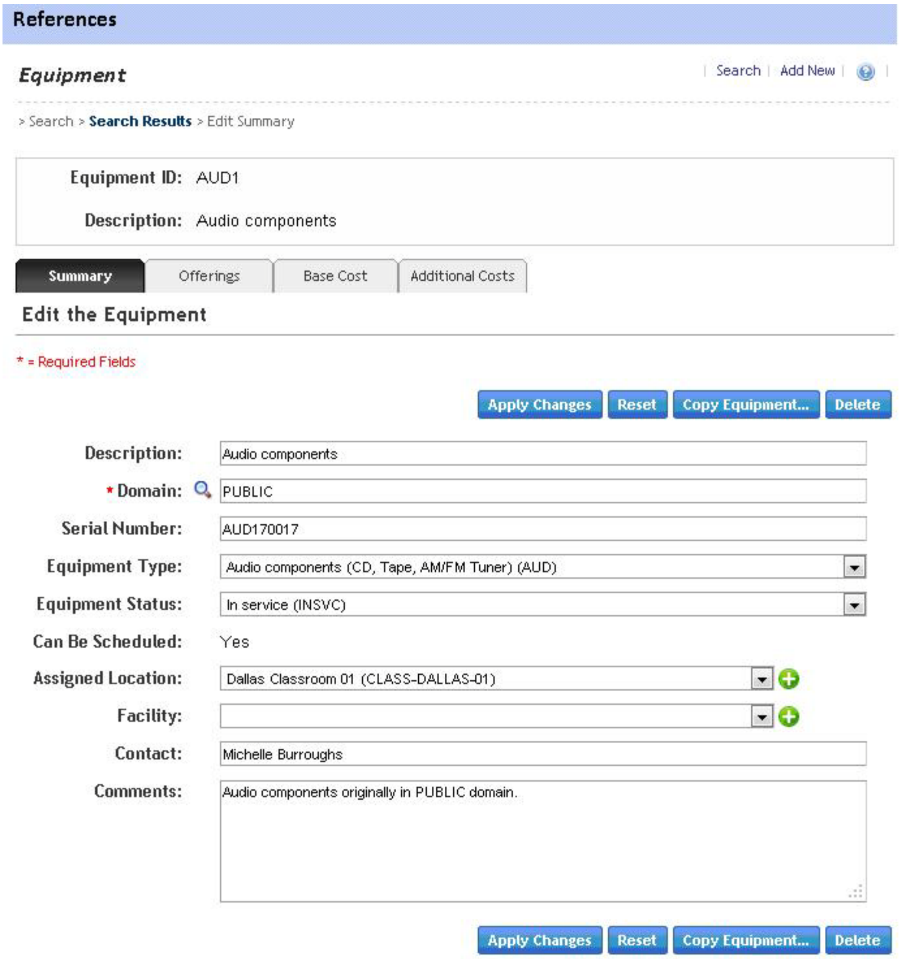


Figure 53: Equipment Record

Lab 13. **Add Equipment**

Step

1. Navigate to **References > Physical Resources > Equipment**.
2. Click the **Add New** link.
3. Enter equipment ID.
4. Enter a description for the equipment.
5. Select a domain for the equipment.
6. If available, enter a serial number.
7. Select the equipment type from the **Equipment Type** drop-down menu.
8. Select the equipment status from the **Equipment Status** drop-down menu.
9. Select an assigned location from the **Assigned Location** drop-down menu.
10. If needed, select a facility for the equipment from the **Facility** drop-down menu.
11. If needed, enter the contact name.
12. If needed, enter comments.
13. Click **Add**.

Job Aid: Resource Management

Materials

Materials are the actual consumable supplies needed for the scheduled offering that are replenished periodically, such as manuals, handouts, and other non-reusable items that are delivered along with the other aspects of training. Anything the learner needs and uses during training or retains after training can be managed as a material by SATERN Learning.

Materials are referenced in a few different locations:

- Resources level
  - Materials section: Edit default information for materials, including descriptions.
- Item level
  - Materials tab: Quantity, target, and offset can be specified for each material.
- Scheduled Offering level
  - Materials tab: The quantities, offset, and target, can be edited and, if necessary, overridden for each scheduled offering of the item. Materials on this tab can be identified as pre-work/post-work.

Lab 14. Add Material

Step

1. Navigate to **References > Physical Resources > Materials**.
2. Click **Add New**.
3. Enter a material ID.
4. Enter a description for the material.
5. Select a domain for the material.
6. If needed, enter a revision number.
7. If needed, enter comments.
8. Click **Add**.

Job Aid: Resource Management

Facilities

You can use the Facility section to monitor and manage facilities in your organization. Facilities are groups of locations. Locations are places where you can assign things to occur, like scheduled offerings, equipment, or materials. Use facilities as a way to group locations together in a method that makes sense to your organization. For example, a building with many classrooms is a facility. Its classrooms can be locations. Or, for example, an industrial complex could be a facility with a training room location, an engineering on-the-job-training location, and a mock-emergency drill site (Figure 54).

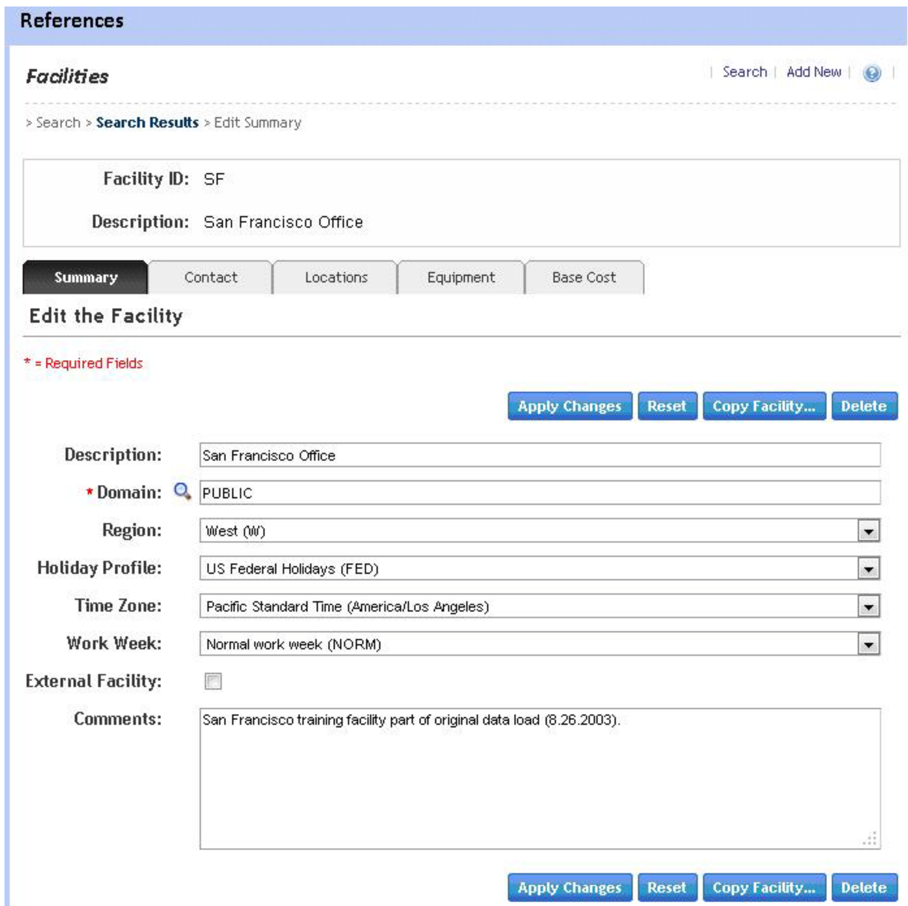


Figure 54: Facility Record

Regions

Facilities may be associated with regions (geographical areas). Learners may also have region attributes (Figure 55), and thereby may search for scheduled offerings local to them (i.e., within their region) (Figure 56).

Figure 55: Learner-side > Options and Settings Easy Link

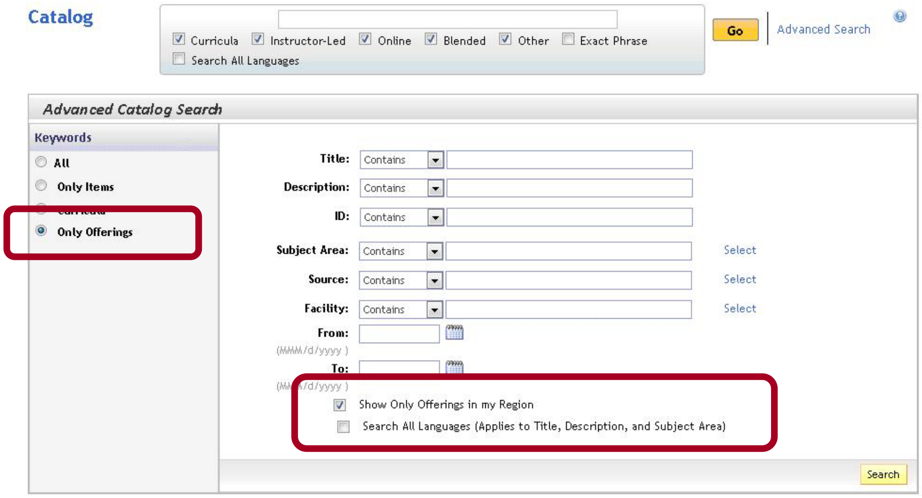


Figure 56: Learner-side > Advanced Catalog Search for Local Scheduled Offerings

Holiday Profiles

A facility can have designated non-training days (holidays). When you create a scheduled offering at a certain facility, the system checks that facility's Holiday Profile and issues an alert if the intended scheduled dates include a non-working day (Figure 57).

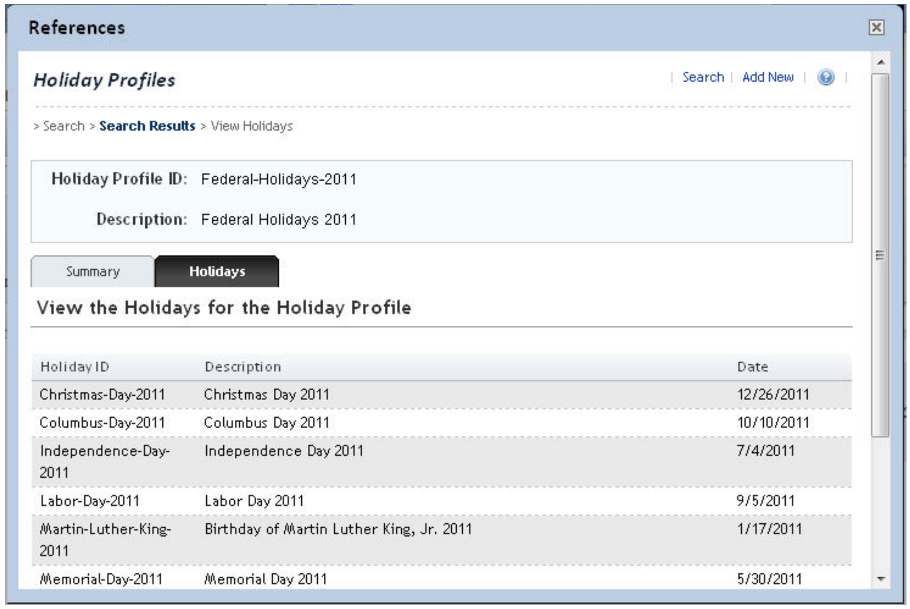


Figure 57: References > Calendars and Time > Holiday Profiles

Work Week Profiles

A Work Week Profile indicates the days of the week training can be scheduled at a facility. If a facility is selected when scheduling an item, SATERN skips the days the facility is not available for training according to the Work Week Profile.

If no Work Week Profile is assigned to a facility, SATERN assumes the training facility is open for business every day of the week (Figure 58).

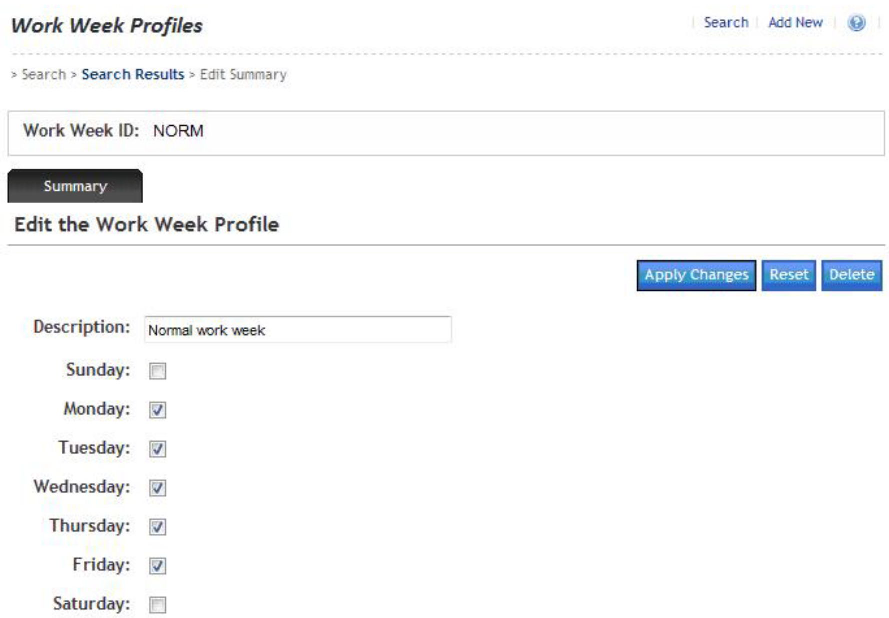


Figure 58: References > Calendars and Time > Work Week Profiles

Lab 15. Create a Facility

Step

1. Navigate to **References > Physical Resources > Facilities**.
2. Click **Add New**.
3. Enter a facility ID.
4. Enter a description of the facility.
5. Select a domain for the facility.
6. Select a region from the drop-down menu.
7. Select the **Holiday Profile** from the drop-down menu.
8. Select the time zone of the facility from the drop-down menu.
9. Select the **Work Week Profile** from the drop-down menu.
10. Click the **External Facility** checkbox if the facility is external to your organization.
11. Enter any relevant comments.

__Note__: This field is for admin informational purposes only.

12. Click **Add**.

Job Aid: Resource Management

Locations

The location refers to the room where the training takes place. This record can be identified as internal or external to the organization and can be associated with a facility (building).

When you create a location resource, you can determine the maximum capacity for the location (Figure 59).

Note*: The capacity field does not prevent over-enrolling in a room beyond its capacity.*

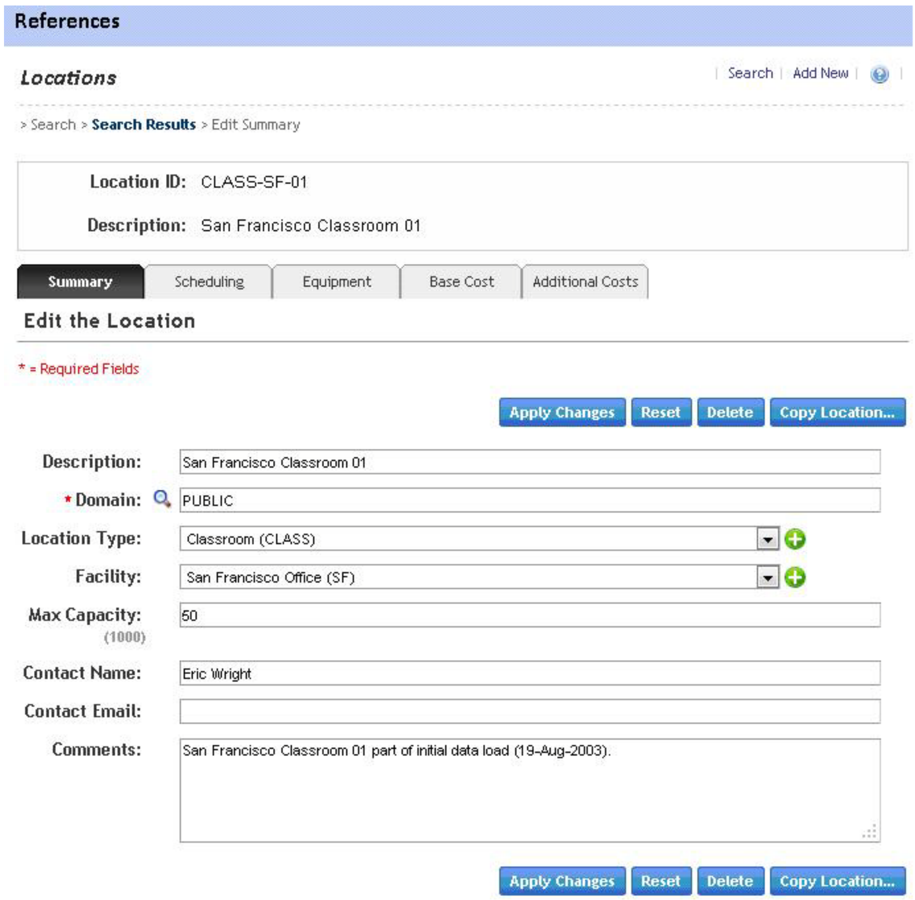


Figure 59: References > Physical Resources > Locations

Lab 16. Create a Location

Step

1. Navigate **to References > Physical Resources > Locations**.
2. Click **Add New**.
3. Enter a location ID.
4. Enter a description for the location.
5. Select a domain for the location.
6. Select a location type from the drop-down menu.
7. Select the facility associated with the location from the drop-down menu.
8. Enter the maximum capacity for the location.
9. Enter a contact name and email for the location
10. Enter any relevant comments.

Note: This field is for admin informational purposes only.

11. Click **Add**.

Job Aid: Resource Management

Location Types

You can edit and create a location type so that administrators can associate facilities with the location type (for example, auditorium, classroom, and science lab) to identify the kind of location that item training requires.

Custom Resources

Use the Custom Resources section to create and manage resources that are specific to your organization and not already defined in the LMS. A custom resource is any resource that you want to track in your system but does not fit the other kinds of resources such as materials or instructors. You can add and edit base costs and additional costs to custom resources.

Related Reports

The following are reports in SATERN that relate to resources:

- Facility Data
- Location Data
- Location Utilization
- Instructor Data
- Equipment Data
- Equipment Status
- Equipment Utilization
- Material Data
- Resource Conflicts
- Holiday Profile
- Region Data

CLOSING A SCHEDULED OFFERING

After the scheduled offering has been delivered, closing the offering finalizes financial transactions associated with the scheduled offering and prepares them for the Financial Transactions Approval Process (covered in the Commerce Basics guide) (Figure 60). Closing an offering also prevents learners from being added to the registration list.

Figure 60: Close Scheduled Offering

Lab 17. Closing a Scheduled Offering*

**Scheduled offerings set in the future cannot be closed. For training purposes, the segments must be entered/changed to past dates to simulate the previous delivery of the offering.*

Step

1. Add a new scheduled offering with a start date in the past. The system will warn you that you are scheduling in the past.
2. Register learners into the scheduled offering.
3. Click **Close the Scheduled Offering** from the Actions area.
4. Leave the default closing date and click **Next**.
5. If there were costs associated with the resources included in the scheduled offering, you will see those costs calculated. If necessary, you may modify the incurred costs and click the Update Total button. For this lab, click **Next** to bypass the **Edit Realized Costs** step without making changes.
6. Click **Finish** on the Confirmation screen.

***Note**: The Close Scheduled Offering tool can also be accessed by navigating to **Learning > Tools > Close Scheduled Offering**.*

SCHEDULING A CURRICULUM

The items in a curriculum can be scheduled all at once using the Curriculum Scheduling feature. In order to schedule a curriculum, the items within the curriculum must be sequenced. SATERN places each item on its own day according to the sequence. Once the scheduled offerings are created, they can be modified prior to registering learners by accessing each scheduled offering and editing the segment information. The new scheduled offerings can be added to a class, and learners in the class can be registered by checking the Auto Register checkbox inside the class record.

Sequencing Items

Prior to scheduling a curriculum, the items must be sequenced from within the Edit window of the Contents tab of the curriculum record (Figure 61). You can adjust the sequencing of the content by clicking the Move Up ( ) or Move Down ( ) buttons.

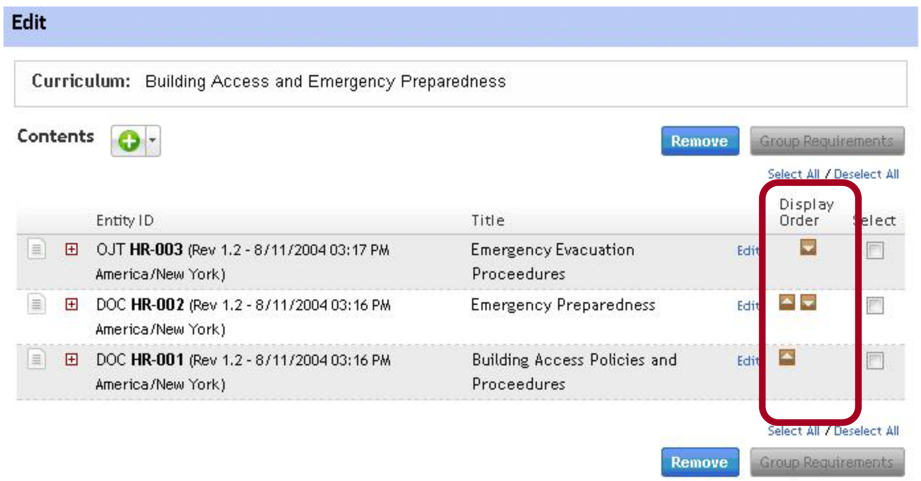


Figure 61: Learning > Curricula > Contents Tab: Edit Screen

Associating a Scheduled Curriculum to a Class

During the curriculum scheduling process, you may associate all the scheduled offerings created for a class. At the end of the process, you will be able to go to the class record and register learners into the offerings (Figure 62).

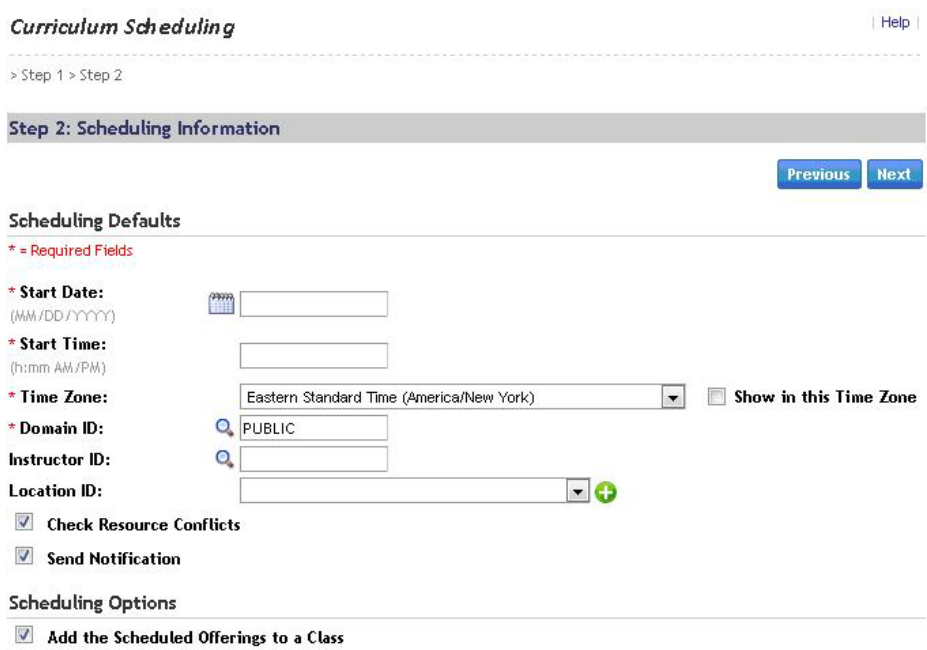


Figure 62: Scheduling Curriculum and Adding Offerings to the Class

Lab 18. Scheduling a Curriculum and Adding to a Class

Step

1. Navigate to **Learning > Tools > Curriculum Scheduling**.
2. Search for and select the curriculum to schedule.

Note: The curriculum's instructor-led items must be sequenced.

3. Click **Next**.
4. Enter a start date.
5. Enter a start time.
6. Select a domain.
7. Check the **Send Notification** checkbox.
8. Check the **Add the Schedule Offerings to a Class** checkbox.
9. Click **Next**.
10. Search for and select a class ID.
11. Click **Next**.
12. Verify all information is correct and click **Finish**.
13. Click **Go to Class**….
14. Select the **Offerings** tab.
15. Check the **Auto Register** checkbox for each offering.
16. Click **Apply Changes**.

NOTES