SATERN

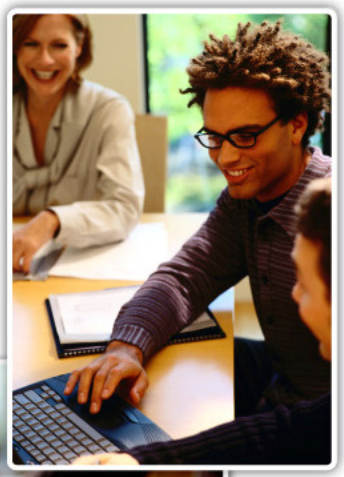
System for Administration, Training, and Educational Resources for NASA

National Aeronautics and Space Administration

SATERN Deltas 5.8 SP5 – 6.4: Learners & Supervisors

Exercise 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.

Table of Contents

Enhancements for Learners **1**
References Related to Learning Needs Management 1
Learner Interface > New Home Page 1
Learner Interface > Enable Accessibility Mode 2
Learner Interface > Access to Online Help 2
Learner Interface > Learning Plan on Home Page 3
Learner Interface > Easy Links on Home Page 3
Learner Interface > Status Pods on Home Page 4
Learner Interface > Navigation Tips 5
Updated Catalog Search 6
Support for Mobile Access 7

Supervisor Enhancements **11**
Re-Designed Supervisor Access to Employee Records 11
Supervisor Accesses Actions via Links 12
Support for Supervisor Delegation 13
Supervisors Can Manage Delegates 13
Supervisors Can Assign Permissions to Delegates 14
Delegate Uses New Delegators Menu to Navigate 14
Support for Notifications to the Delegate 15
Support for Alternate Supervisor 16
Supervisor Wizards Streamlined 18
System Admin > Enabling Supervisor Access to Streamlined Wizards 18

Enhancements for Learners

This section discusses changes to the software that effect learners. The next section covers changes to interactions for learners who are supervisors.

References Related to Learning Needs Management

Learner Reference Guide

Delta Document – from 5.8 SP5 through 6.4

Web-Based Tutorial for SATERN Learners

Learner Interface > New Home Page

The revised **Home** page gives the learner new ways to locate and perform actions. Navigation is supported by the Learning Plan, Easy Links, Catalog search/browse, and Status Pods (Figure 1). This section describes the interface and gives tips on navigation.

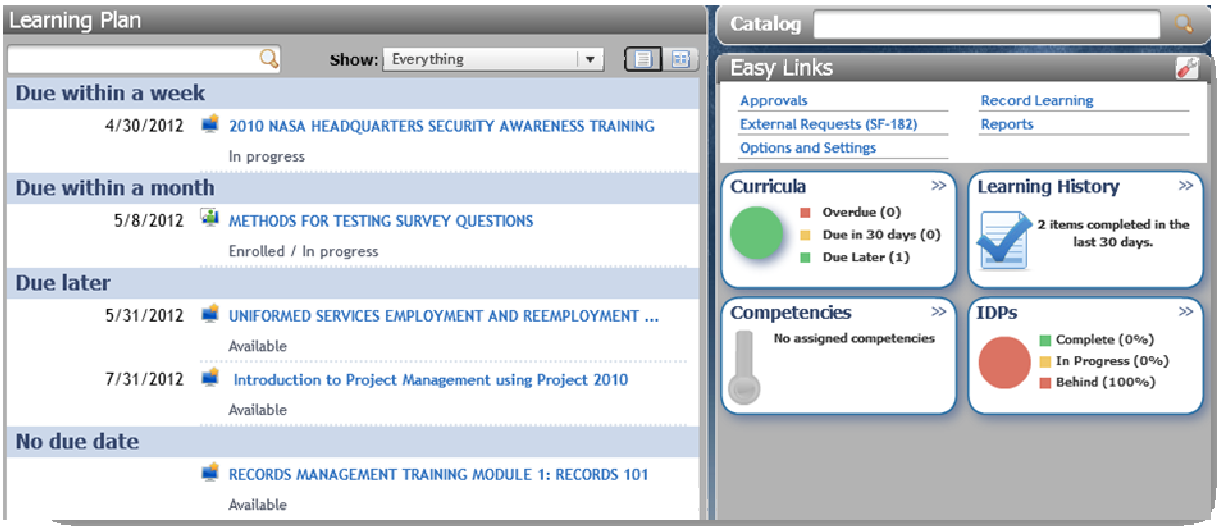


Figure 1. Home Screen with Alert, Learning Plan, Easy Links, and Learning Status Pods

NOTE: NASA can define the ranges for each due date "bucket" on the Home page. The default entries are: Overdue, Due within a Week, Due within a Month, Due Later, and No due date.

Learner Interface > Enable Accessibility Mode

Learners who rely on a screen reader to interpret contents of a page will hear instructions for entering accessibility mode. The learner can select a key stroke combination to enable an accessible view of the application.

Learner Interface > Access to Online Help

The link for **Help** that displayed at the top of the screen in previous versions is gone. Now learners will find a context-sensitive help icon ( ) on each content page. After accessing *any* help screen, learners can use the **Search** tab to perform a global search based on keyword.

Learner Interface > Learning Plan on Home Page

The Home page contains a Learning Plan as a consolidated view of tasks requiring action. This means that all tasks are in one place.

The learner can hover over an entry to reveal a 'pop-up' that shows additional information and available actions. From the pop-up, the learner can use a hyperlink to view details or take action.

Figure 1 illustrates the **List View** of the Learning Plan. Learners may prefer to display the Learning Plan as a card view. Selecting the icon from the top left menu gives full details and navigation links for each relevant action.

Learner Interface > Easy Links on Home Page

The **Home** page contains a panel with **Easy Links** which support easy navigation. Figure 1 illustrates one example where the learner has access to a variety of links to pages inside and outside the LMS. Access to each easy link is controlled via learner workflow.

A learner cannot add their own links, but can decide which pre-configured links to display.

- Select the wrench icon ( ) to configure Easy Links, de-selecting links of little interest
- Select **Show More** to see the full list at any time

Learner Interface > Status Pods on Home Page

The Home page contains a **Status Pods** panel which is a way for learners to view a snapshot of progress on learning status. Access to status pods is enabled via learner workflows.

The learner can click on a status pod to view details. For example, the learner can select the **Curricula** status pod and open the **Curriculum Status** screen. From here, the learner can select the curriculum title to learn more.

Completed Work > Learning History

A learner's learning history is now called *Completed Work* and can be accessed via the **Completed Work** status pod. This list contains all completed work including items and competency assessments. Learners can filter the list by using a keyword , by selecting a specific status, or based on completion date.

Learner Interface > Navigation Tips

The Home page makes it easy for learners to access common places or processes. Table 1 summarizes key navigation differences between versions 6.x and 5.8 SP5 for accessing learning actions.

Table 1. Comparison of Learner-Side Navigation in 6.4 and Previous Versions

Task/ Action	How to access in 6.4	Menu in 5.8
View learning items and requirements	Home > Learning Plan > filter on All Learning	Learning > Learning Plan
Request schedule for an assigned item	Home > Learning Plan > hover over item > select Request Schedule	Learning > Learning Plan > select item > select Request Schedule
Access assigned training evaluations/ surveys	Home > Learning Plan > filter on Surveys	Alert message -or- Learning > Surveys
View current and pending registration in scheduled offerings	Home > Learning Plan > filter on Registration	Learning > Learning Calendar -or- Learning > Current Registration
View status for assigned curricula	Home > Curricula status pod	Learning > Curriculum Status
View learning history	Home > Easy Links > Completed Work	Learning > Learning History
Record learning for yourself	Home > Easy Links > Record Learning	Learning > Record History
Submit or view SF-182 external training requests	Home > Easy Links > SF-182 Requests	Learning > SF-182 Requests
Access/edit talent profile (to edit supervisor or coach)	Home > Learner Card (top of screen) > click on name	Personal > Profile
View/update approvals for others	Home > Alert message -or- Home > Easy Links > Approvals	Home > Select approval alert -or- Personal > Approvals
Run reports	Home > Easy Links > Reports	Reports
Change preferences, select learning notifications settings	Home > Easy Links > System Settings	Personal > Learner Settings

UPDATED CATALOG SEARCH

The learner catalog search has been simplified to increase search proficiency. A learner can perform a catalog search from the search box above the **Easy Links** section on the *Home* page. Figure 3 illustrates the catalog view and the **Advanced Search** view.

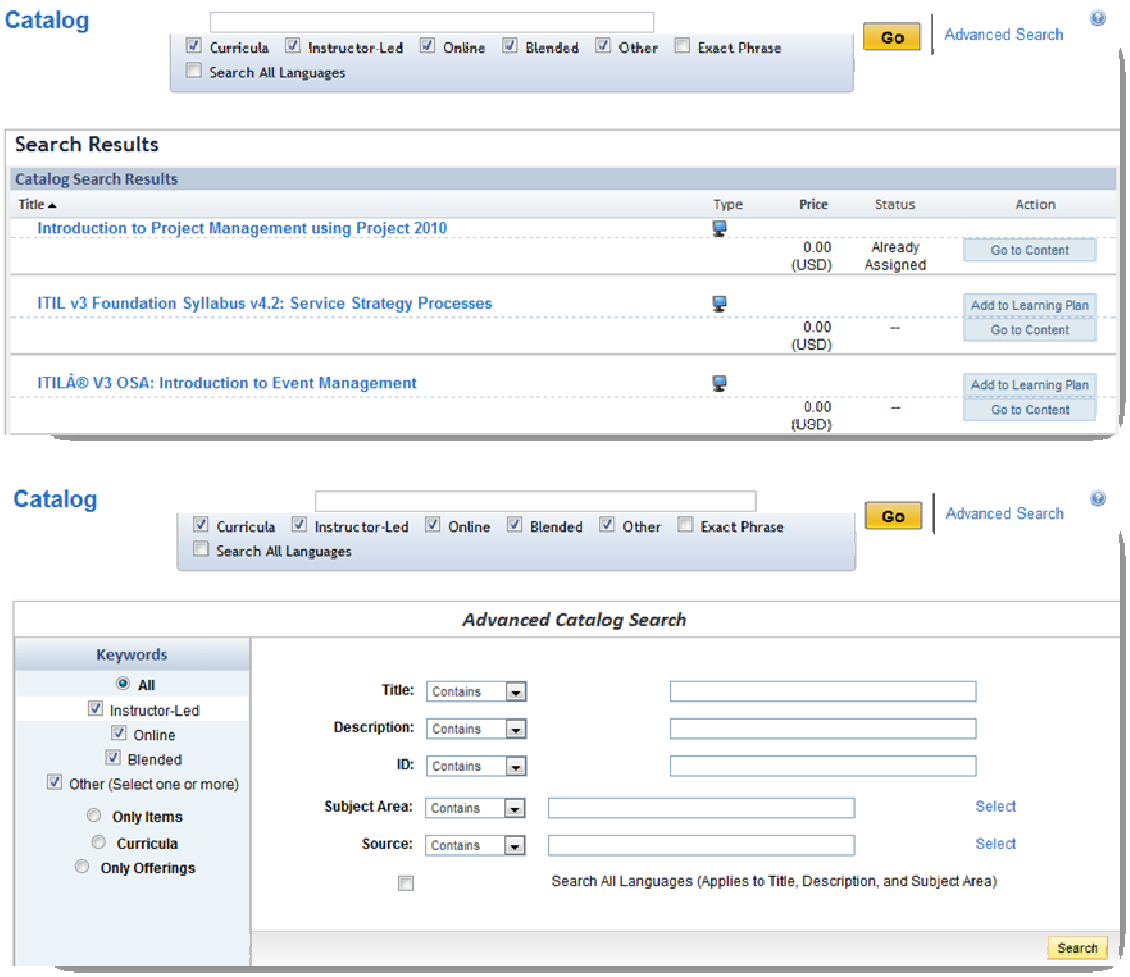
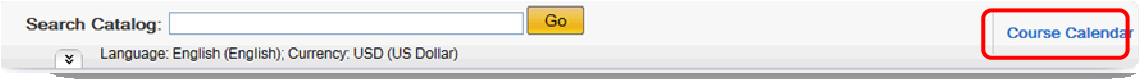


Figure 3. Advanced Calendar Search Options

Access to view and search the **Course Calendar** has been relocated to the **Catalog Search** bar located at the top of the Browse Catalog screen



SUPPORT FOR MOBILE ACCESS

Mobile access enables learners to perform such actions as:

- view Learning Plan
- view item details from the catalog
- view available scheduled offerings
- launch AICC online content and wrapped documents
- register/withdraw from scheduled offerings (without commerce functionality)
- view learning approvals
- approve/deny learning requests

Each online content object > **Launch Method** tab can be edited for mobile access. Changes are a checkbox for **Enable Mobile Access**. You can provide a specific file name if content was designed for mobile access.

Notes

Supervisor Enhancements

This section introduces the enhancements made for supervisor interactions between versions 5.8 SP5 and 6.4.

RE-DESIGNED SUPERVISOR ACCESS TO EMPLOYEE RECORDS

Supervisors access employee records from the **My Employees** status pod. Supervisors open a new window with a list of direct subordinates and expandable list of indirect reports. A supervisor can select an employee to view details, such as viewing his/her Learning Plan (Figure 4).

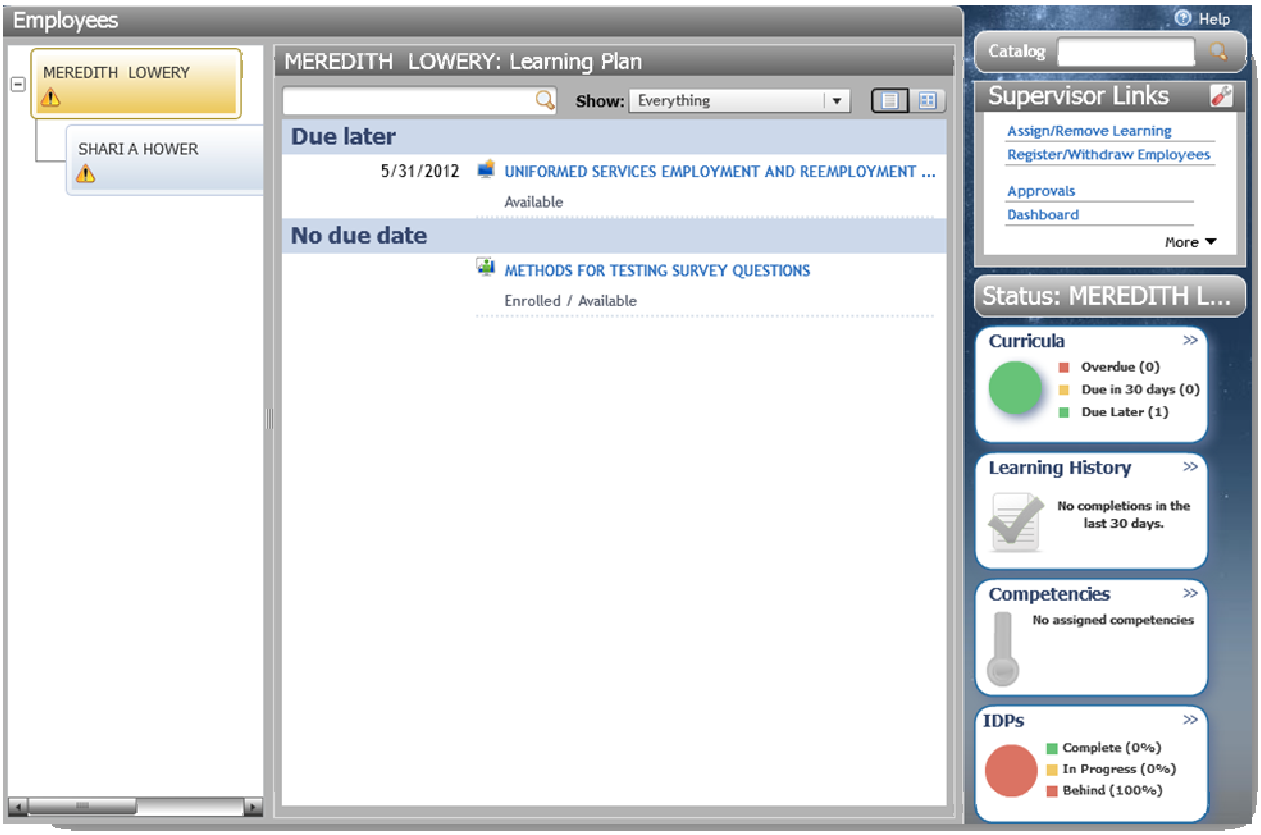


Figure 4. Supervisor Team Viewer

Supervisor functions for each employee are also available by hovering on the employee name in the team view.

Supervisors are essentially on the **Home** page of their employees. They can take all the available supervisor actions, such as assign learning to the employee, register the employee in scheduled offerings, view the status of the employee's curricula, and view completed work.

In addition to the Learning Plan, the learner's status buttons are available for the manager to access secondary pages. The supervisor gets the same real time data that the learner gets.

Supervisor Accesses Actions via Links

When viewing an employee on the **My Employees** workspace, supervisors have various actions available through the **Supervisor Links** area (Figure 4). The organization chart is accessible by clicking the **Organization Chart** link.

Role Management > Control Supervisor Actions on Employee Records

Supervisor access to menus/actions while viewing the employee's record is now controlled by learner workflows. To view/edit:

1. Go to **System Admin > Security > Role Manage**ment and select the role assigned to one or more supervisors.
2. **Go to Workflows** > **My Employees.**
3. Add/remove workflows to control access to supervisor actions.

SUPPORT FOR SUPERVISOR DELEGATION

A supervisor delegation feature enables supervisors to entrust other learners with supervisor responsibilities. To access the delegates feature, go to **Home > Easy Links > Options and Settings**. (Admins may be able to perform this action on behalf of the learner if they have rights to launch learner proxy and manage delegates.)

Supervisors Can Manage Delegates

Supervisors can select a delegate from any learner in the system, clicking Add and using the search features to locate and select delegates. Figure 5 shows the results.

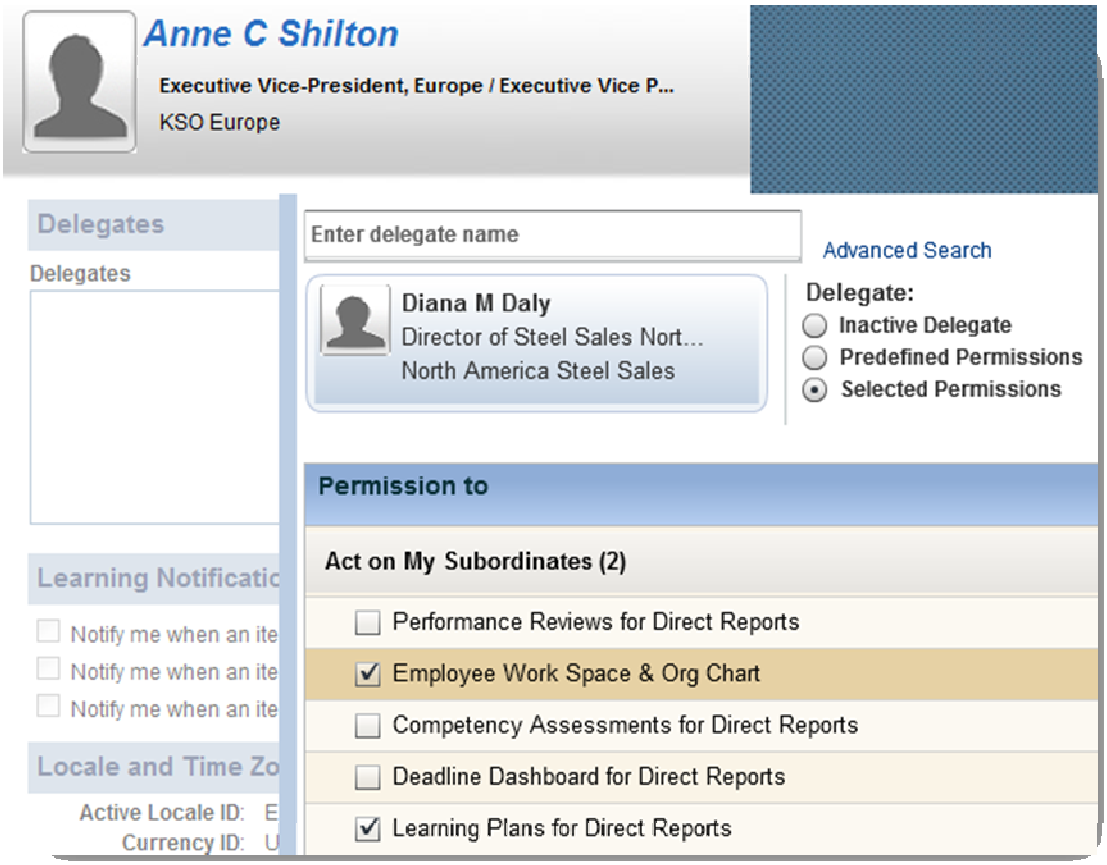


Figure 5. Options and Settings to Manage Delegate(s)

Supervisors Can Assign Permissions to Delegates

Once the delegate is selected, the supervisor defines permissions. Assigned delegate permissions are based on workflows. Three types of permission assignments are possible:

- Inactive Delegate: Select to temporarily revoke delegate permissions from the selected delegate for the short term. This saves the assigned permissions, and reset them to their previous values when the delegate is moved out of the *Inactive Delegate* setting.
- Predefined Permissions: Assign a specific set of permissions that have been defined by an admin. These permissions are defined by a pre-set security role. The system remembers what was previously selected if delegate is made inactive.
- Selected Permissions: Select permissions from a list to assign a custom set of permissions to the delegate. Only permissions currently assigned to the supervisor are available.

Delegate Uses New Delegators Menu to Navigate

If a learner is assigned as delegate, he/she will see the Delegators icon on the learner Home page (Figure 6)

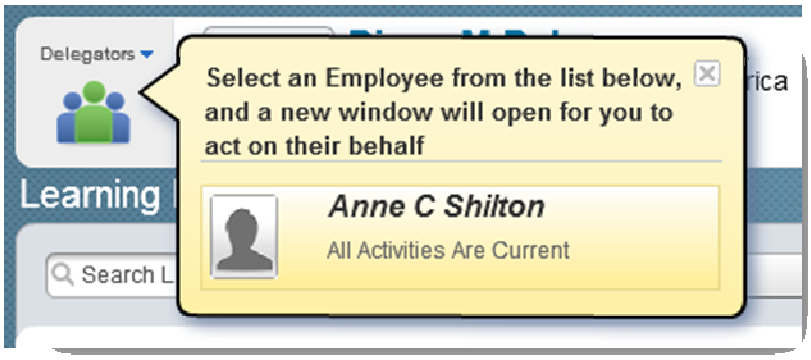


Figure 6. Delegators Icon > Navigation Pane

The learner clicks the Delegators icon to see a list of employees who designated the learner as a delegate. They can access any of these learner's functions by bringing up a new form in a *separate* browser window. A highlighted note informs the learner that s/he is acting on behalf of another learner (Figure 7).

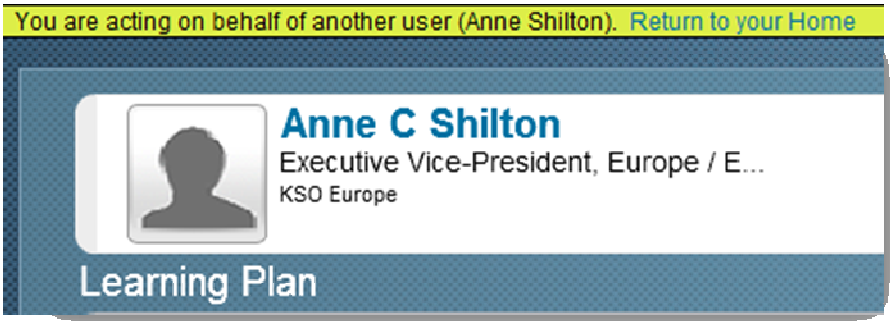


Figure 7. Delegatee View

Support for Notifications to the Delegate

Two new email notifications are associated with the assignment of delegate permissions: *DelegationAssignment* and *DelegateeEmail*.

When identified as a delegate, the system uses a new notification template (DelegationAssignment) to inform the learner of the delegation assignment.

As a delegate, the learner will receive any notifications that a supervisor would normally receive, such as approvals needed, if the supervisor has delegated that permission. The system uses a new notification template (DelegateeEmail) for this message.

NOTE: Informational messages are not sent to the learner who has been delegated.

SUPPORT FOR ALTERNATE SUPERVISOR

The system supports management of up to ten alternate supervisors for employees. Alternate supervisors can be managed from the admin or supervisor interface.

***NOTE**: If an admin adds an alternate supervisor, the supervisor can only be edited or removed via the admin interface.*

For a supervisor to select alternate supervisors, go to **My Employees**, hover over a subordinate name on the left, and select **Manage Alternate Supervisors** (Figure 8).

Figure 8. Learner Record > Manage Alternate Supervisors

Use the *Choose Alt Supervisor* field to type a name, then select an alternate supervisor from the dropdown results. (The organization for this learner is shown in the right column.)

The option for **Advanced Search** provides more specific fields for searching such as learner ID, first name, and/or last name.

The supervisor can use the remove icon ( ) to remove the alternate supervisor (Figure 9).

Figure 9. Alternate Supervisor Display with One Alternate Identified

After a supervisor or admin assigns a learner as an alternate supervisor, the system updates their **My Employees** interface. A few key points:

- Alternate supervisors cannot remove themselves from the list of alternate supervisors
- The alternate supervisor can identify *another* alternate supervisor for the learner
- Primary and alternate supervisors can only remove alternate supervisors that they have selected

SUPERVISOR WIZARDS STREAMLINED

The wizards for supervisor actions are streamlined to make choices easier to understand. This will need to be enabled globally. The system presents icons representing the supervisor's options for assigning/unassigning learning, registering/ withdrawing learners, and recording learning for learners

Log in as supervisor learner and browse to item in catalog. If enabled, click **Assign to Others** and it opens revised Assignment Learning wizard

After the supervisor selects the first step in the wizard, options that follow are also simplified. For example, the supervisor sees a **Quick Select** dialog when identifying learners to include in this action, based on the reporting chain.

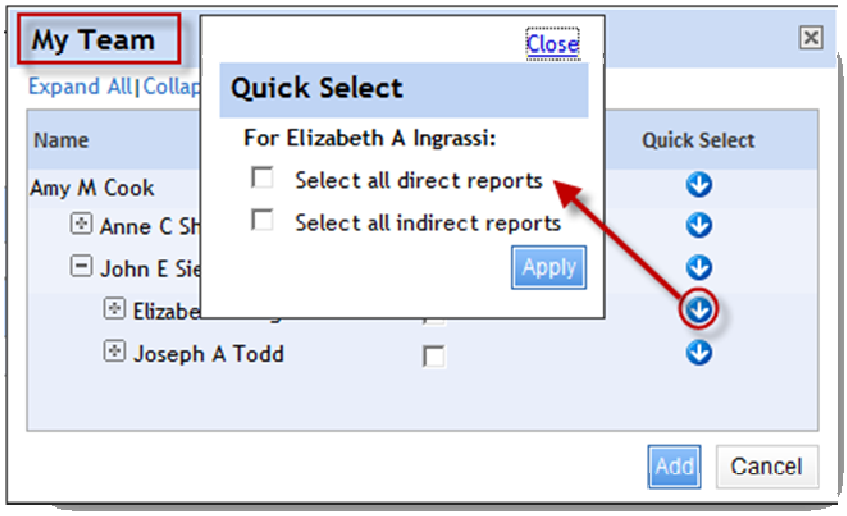


Figure 10. Supervisor Options for Selecting Learners

System Admin > Enabling Supervisor Access to Streamlined Wizards

These options must be enabled in **System Admin > Configuration > System Configuration > LMS_ADMIN**. Set updatedSupervisorFlow=**true**