



Run Employee Reports

As a supervisor, you can run reports in SATERN that will help you monitor the progress the employee has made toward completing his/her IDP goals. The **Individual Development Plan** report includes data on goals, development activities, comments, and progress. The **Learning History** report includes data on *completed* catalog items and external activities.

- On the **My Employees** tab, click the **Reports** link under **Supervisor Links**.
- From the **Report Name** list, select **Individual Development Plan (IDP)** or **Learning History**.
- Choose to run a report for yourself (select **Self**), your direct reports (select **Direct Subordinates**), all of your reports (select **All Subordinates**), or all of them (select **All**).
- Select the desired **Report Format**. (*Note: The default is HTML, or you can select PDF from the drop-down menu.*)
- Click **Run Report**.
- The report(s) display(s) in a new browser window. You can print the report(s) as you would any other document.
- Close the new browser window.

For Coaches And Mentors Only

View An IDP And Add Comments

As a coach/mentor, you may be asked by your coachee/mentee to review and comment on his/her draft IDP in SATERN.

- Log into SATERN at <https://satern.nasa.gov>.
- On your home page, select Easy Link **Individual Development Plan(s)**.
- Under **IDP Links**, click **View Other Learner's My Goal** workspace.
- On the **View Mentee's Goals** workspace, select the appropriate employee.
- On the **My IDPs** workspace, from the **Select IDP** drop-down, choose the coachee/mentee's active IDP you want to view.
- Click on the **Goal Name** to view the goal details.
- Scroll down to **Activities** and click on the **Activity Name** to View Activity details.
- Once you have reviewed the content, click **Close**. Perform this step and the previous step for all of the goals and activities in the employee's IDP.
- *Optional:* To add notes for the employee:
 - To add **Goal Notes**, hover over the **Goal Name** and select **Add/Delete Goal Notes**. Enter comments in the **Goal Notes** text box, click **Add**, and then click **Done**.
 - To add **Activity Notes**, hover over the **Activity Name** and select **Add/Delete Goal Notes**. Enter comments in the **Activity Notes** text box, click **Add**, and then click **Done**.
 - Click **Save and Close**.

GLOSSARY

Catalog Item: Any learning or development activity listed in SATERN

Competency-Based Goal: A development goal that corresponds to a specific NASA competency in the Competency Management System (CMS)

Date Period: Some Centers and leadership programs specify the date period for IDPs. You may be required to select one of these:

Performance Year/s, (1–3 years): May 1–April 30

Leadership Program (14 months): December 1–February 28

Development Activity: Any activity that builds expertise or skills; in the IDP, these are classified as either catalog items or external activities

External Activity: Any learning or development activity that is not listed in SATERN (e.g., conference, college course, on-the-job training); may or may not require an NF-1735

Non-Competency-Based Goal: A development goal that does *not* correspond to a NASA competency; articulated by the employee in a free-form text field

Priority: The level of importance of a goal or activity; can be high, medium, or low

Section ID: You can create short-, mid-, or long-range goals, though you are not required to have all three in your plan:

Short-Range: Goal you plan to achieve within the *next year*

Mid-Range: Goal you intend to achieve in *2–4 years*

Long-Range: Goal you wish to achieve in *5 years and beyond*

Target Date: Date by which you plan to complete the development activity

Help Resources

NSSC Contact Center: 1-877-NSSC-123 (1-877-677-2123)

Hours of Operation: Monday–Friday, 8 a.m.–8 p.m. EST

E-mail: nasa-satern.support@nasa.gov

Login: <https://satern.nasa.gov>

SATERN

*System for Administration,
Training, and Educational
Resources for NASA*

QUICK REFERENCE GUIDE

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Individual Development Plan



Create an IDP

- Log into SATERN at <https://satern.nasa.gov>.
- On your home page, select Easy Link **Individual Development Plan(s)**.
- Under IDP Links, click **Create IDP**.
- Complete the required fields: **IDP Type (Development)**, **IDP Name** (e.g., Systems Engineering), and **IDP Period** (e.g., Performance Year 2012 (1 year)). The **Description** is optional.
- Click **Save and Close**.

Your plan information is now complete.

Add a Goal

After you have created an IDP, you must add at least one development goal to support it or you will receive an error when you try to submit your IDP for approval.

- Click **Add Goal**.
- At this point, you can proceed to add *competency-based goals* or *non-competency-based goals*. The business and technical competencies in SATERN are representative of those listed in NASA's Competency Management System (CMS).

Add a Competency-Based Goal

- After clicking **Add Goal**, click the **Goal Wizard** link.
- Select **Add Competency Related Goals**.
- Click **Next**.
- Enter keywords that relate to your desired competency (e.g., Systems Engineering).
- Select a search type (e.g., **Search from all Competencies**).
- Click **Next**.
- Select the checkbox for the competency that best reflects your goal. (*Note: You may choose more than one to create multiple goals at once.*)
- Click **Next**.
- Confirm or add the required fields: the **Goal Name**, **Target Rating** (use default rating of 1), and **Target Date**.
- Ensure that the **Select to Add** boxes are checked (default).
- Click **Finished**.

Add a Non-Competency-Based Goal

- After clicking **Add Goal**, complete the required fields: **Goal Name** and **Target Date**. Other fields are optional (e.g., **Description**, **Priority**, **Start Date**, or **Section**).
- Click **Save and Close**.

Add a Development Activity

After you have added a goal, you may add one or more development activities to support it. On the **Edit Goal** screen, you can add a *catalog item* from SATERN or an *external activity* that is not in SATERN.

Add a Development Activity—Catalog Item

- Select a goal you created (e.g., Systems Engineering) by clicking on the **Goal Name**.
- Scroll down to **Activities**.
- From the **Create New Activity** drop-down, select **Create Activity Using Learning Items**.
- Select **Item Type(s)**.
- Enter keywords that describe the criteria you wish to use to search SATERN for items. (*Note: For a broader search, you may need to remove the competency that populates the search criteria automatically for competency-based goals.*)
- Click **Search**.
- Select the checkbox for the item(s) you wish to include. (*Note: There may be multiple pages of items. You may choose more than one item to add multiple activities at once.*)
- Click the **Add** button.
- Select an **Activity Name** you created to confirm or Edit Activity with the required fields: **Activity Name** and **Target Date**. Then click **Save**.
- Click **Save and Close**.

Add a Development Activity—External

- Select a goal you created (e.g., Systems Engineering) by clicking on the **Goal Name**.
- Scroll down to **Activities**.
- From the **Create New Activity** drop-down, select **Create External Activity**.
- Complete the required fields: **Activity Name** and **Target Date**.
- Click **Save**.
- Click **Save and Close**.

Submit an IDP

After all goals and activities have been added, you may submit your IDP for review by your Supervisor.

- From the **Select IDP** drop-down, select the IDP you wish to submit.
- Click the **Submit for Approval** button.
- Click the **Yes** notice that you can recall the IDP.
- Confirm that the IDP Status is now **Pending Approval**.

Recall an IDP

You have the ability to make changes and resubmit your IDP for approval.

- Click the **Recall IDP** button.
- Click **Yes** to confirm.
- You may now edit your IDP and resubmit for approval.

Print an IDP

- On the My IDPs Workspace, click **Print IDP**.
- Select **HTML** (default) or **PDF** (recommended) Report Format and click **Print**.
- The report displays in a new browser window. You can print the report as you would any other document.
- Close the new browser window.

For Supervisors Only

Approve/Reject An IDP

When an employee submits an IDP for your review, you will receive an e-mail notification.

- Log into SATERN at <https://satern.nasa.gov>.
- On your Learner home page, click the **Alert** box that reads, "You have pending approval requests." (*Note: If no alert appears, you have no pending IDPs for approval.*)
- Select the **Performance Management** tab.
- Click the **Review** button for the plan you wish to review.
- Confirm that you are viewing the intended IDP; the employee's name will be under **Supervisor Approval of IDPs** at the top of the screen.
- Click on the **Goal Name** to view the goal details.
- Scroll down to Activities and click on the **Activity Name** to View Activity details.
- Once you have reviewed the content, click **Close**. Perform this step and the previous step for all of the goals and activities in the employee's IDP.
- *Optional:* To add notes for the employee, click **Add/Edit IDP Notes**. Enter comments in the IDP Notes text box, click **Add**, and then click **Done**.
- Click either the **Approve** or **Deny** button. If you deny the IDP, you are required to add comments regarding your reason for denial. Enter your comments in the Deny Comment text box and click **Submit**.

Note: When an employee resubmits an IDP after denial and editing, follow the procedure above to accept or deny it again.