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

National Aeronautics and Space Administration



SATERN Deltas 5.8 SP5 – 6.4: Learning Needs Management

Exercise Guide (Version 6.4) May 2012



For SATERN v 6.4 Last Modified 4/30/2012

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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

Learning Needs Management Introduction1	1
Course Objectives1	1
References Related to Learning Needs Management	2
Lesson 1: Deltas for Catalog Items	3
Lesson Objectives	3
Item > New Record Layout and Configuration	1
Tour of the Item Record Layout in SATERN	1
Notes on SATERN Business Rules for Item Required Fields	5
Changes to Segments ϵ	5
Localization Supports Additional Languages7	7
Admin Actions from the Item Record	3
Item > New Item Wizard Re-Designed12	2
Lab 1. Create a New Instructor Led Item14	1
Lab 2. Edit the New Instructor Item15	5
Lesson 1 Wrap Up 17	7
Lesson 2: Deltas for Curricula 20)
Lesson 2 Objectives)
Curriculum > New Record Layout and Configuration	1
Lab 3. Create and Edit a New Curriculum25	5
Lesson 2 Wrap Up 27	7
Lesson 3: Deltas for Assignment Profiles 29	•
Lesson 3 Objectives)
Assignment Profile Re-Designed)
Scenario and Worksheet for this Assignment Profile	3
Lab 4. Create a New Assignment Profile	5
Lesson 3 Wrap Up	3

Learning Needs Management Introduction

This exercise book describes the streamlined experience for SATERN admins who manage instructor-led items, curricula, and assignment profiles. The addition of bookmarks, simplified wizards, and cross referenced records entities provide easier access to data and simplified flows.

COURSE OBJECTIVES

- Identify changes to items, curricula, and assignment profile records including new wizards, record layout, SATERN required fields, and bookmarking
- Log in to the admin side of SATERN and demonstrate steps to access new and revised items, curricula, and assignment profiles
- Locate and make notes on the <u>SATERN Learning Needs Management</u> course book that help you prepare to train your administrators

REFERENCES RELATED TO LEARNING NEEDS MANAGEMENT



Learning Needs Management course book

Delta Document - Changes from SATERN 5.8 SP5 through 6.4



Lesson 1: Deltas for Catalog Items

This section describes changes to instructor-led items. The addition of bookmarks, a new wizard to create an item, and cross referenced records provide easier management for admins.

LESSON OBJECTIVES

- List key changes to item records, including required fields based on SATERN business rules
- Demonstrate steps to add a new instructor-led item
- Research and identify new functionality such as links between related records, new Actions available, bookmarking, and other shortcuts
- Locate and make notes on *Lesson 1 Items* in the <u>SATERN Learning Needs</u>
 <u>Management</u> course book

ITEM > NEW RECORD LAYOUT AND CONFIGURATION

As discussed in the *Admin Introduction*, item records have been changed in SATERN 6.4. This overview gives a tour of the new record with default global configuration.

In the next lab, you will create a new item and research its fields. After that, you can set your own preferences for field display.

Tour of the Item Record Layout in SATERN

View of item bookmark (fields associated with Summary tab in previous version):

Ethics Training for NASA Employees 2012				-ETH-0 <u>[]</u> 🤤 🧕	Action	s View All
Metrics That Matter (M		Funding Organization:		<u> </u>	Assign	
*Academic Credit Code:	05 (N/A)	Classification:	Instructor-	Led	Schedul	e
*Domain:	NASA Headquarters (HQ)	Approval Process:	1STEP SUP	ER (1STEP SUI 👻	Unbooki	mark 🔳
Approval Required:	; No	Assign. Type:	Federally	Mandated (M	Send No	tification
*Contact's Email: noemail@nasa.gov		Credit Hours:	1.00		Сору	
View All 🕣		S	ave Cancel	Revise	v	
Related More 😔 S	ubject Areas 📀					٤ ا
Segments 📥 T	ïtle			Subject Area ID		Remove
Online Content			1.			Select All
Catalogs Personal/Professional Development				10		
Competencies						
Curricula						

Item record > Extended Summary section from View All:

Extended Summary			
Active:	Yes	Creation Date:	8/17/2010
*Source:	Internal (INTERNAL)	Length:	1.00
Max Registration:		Min Registration:	
Self Registration:	Yes		
Comments:			
Budget Line Item:		*Type of Training Sub-Code:	03-32 (Mandated Training)
*Source of Training:	01 (Government Internal)	*Training Credit Type Code:	03 (Continuing Education Unit)
*Direct Cost Code:	0 (No Direct Cost)	*Indirect Cost Code:	0 (No Indirect Cost)
PO Number:		Category Code:	

Item record > Design section from View All:

Design			
*Contact Hours:	1.00	CPE Hours:	
Initial Basis:		Initial Number:	
Initial Period:		Retraining Basis:	
Retraining Number:		Retraining Period:	
*Audience:	NASA Employees		

Item record > Process Control section from View All:

Process Control

Do Auto Competency:	No	Enable electronic signature:	No
Enable Learner Requests:	Yes	Enable Learners to Waitlist:	Yes
Supervisors can record Learning Event	No	Learner can record Learning Events fo	No
Registration Threshold Days:			



Notes on SATERN Business Rules for Item Required Fields

Changes to Segments

Item record > Segments from Related:

Ethics Training for NASA Employees 2012 COURSE HQ-ETH-001-10 (Rev 201 🗓 🤤 😣 Actions				IS View All		
Related More 🕀	Segments 🔕					e
Segments	Description	Duration	Delay Start	Location Type	Actions	Delete
Online Content						Select All
Catalogs	- Day 1 💼					
Competencies	Session 1	1.00			Equipment	
Curricula					Copy To All	

Table 1. New Icons Related to Item Segments

lcon	Description
	Use green plus sign to add a new segment
	Use copy symbol to copy segment one or more times
Delay Start	Offset field is renamed to Delay Start

Localization Supports Additional Languages

Localization was added to frequently-used data fields related to items:

- Items > Summary tab: Title and Description fields
- Learning References > Assignment Types: Description field
- Learning References > Completion Status: Description field
- Learning References > Item Types: Description field
- Learning References > Subject Areas: Description field

A globe icon has been added to the right of each localized field (Figure 1).

	Apply Changes Revis	e Reset Copy Item Schedule Delet
* = Required Fields		\sim
Title:	Procedures and Policies	
Classification:	Instructor-Led	
Source ID:		

Figure 1. Item Summary Tab - Data Localization for Title Field

Because SATERN currently supports just one language, the pop-up for this globe icon explains that "this label is not assigned to any Locales" (Figure 2).



Figure 2. Pop-Up Message for Localized Fields

New Prompt for Admins to Search All Locales

Throughout the admin interface, **Search All Locales** radio buttons have been added to search pages where data has been localized.

Case sensitive search:	O Yes 🖲 No
Search All Locales:	🛇 Yes 🖲 No
Item Types:	Starts With
Item ID:	Starts With
Revision Date: (MM/DD/YYYY)	(2000)

Figure 3. Item Search > Prompt for Search All Locales

NOTE: For the learner, a new **Search All Languages** checkbox has been added to the simple catalog and advanced catalog searches (Figure 4).

🔽 Curricula	🗹 Instructor-Led 🛛 Online	🗷 Blended 🗵 Ot	ther
🔲 Exact Phras	e 🔲 Search All Languages		

Figure 4. Learner-side Simple Catalog Search - Search All Languages

Admin Actions from the Item Record



The new **Actions** menu provides easy access to common tasks related to an item.

Item > Enable Learner Ratings

SATERN admins can enable learner ratings for courses that they have completed . This feature allows learners to provide a satisfaction rating upon completion.

You can enable this feature per item within the **Process Control** section.

NOTE: The admin can decide whether to include ratings from previous revisions in calculating the average rating for the item.

When enabled, a "What did you think?" pod appears on the right of the Learning Plan to let the learner know that learning has been recorded (Figure 9). Learners can rate the item on a 5 star scale. Ratings are collected and displayed to admins from the item record (Figure 10) and learners who can view the item in a catalog (Figure 7).



On une a Detinue	A.A.4	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	Rating Details		X
Classification			3.50 out of 5 stars - 3 ratings		
*Domain	Europe	Oil (EU-OIL)	***	0	0%
			☆☆☆☆☆	2	67%
		★★★☆☆ ━━━━	1	33%	
			☆☆ ☆☆☆	0	0%
n Delay	Start	Location T	★☆☆☆☆	0	0%

Figure 5. What Did You Think? Prompt

Figure 6. Admin View



Figure 7. View of Ratings from the Catalog





Note: The text displayed for the learner reminder pod, the star values, etc. can be edited via labels.

Item > Can Modify Expiration Notification Defaults at Item Level

After you add a new item, you can change the default values and selections inherited from the new global settings in the Learning Expiration Notification APM .

When the automatic process executes, the system uses the values and settings of the item.

Navigate to the item's Notification tab which now contains a section called **Override Learning Expiration Notification Defaults** (Figure 8). Defaults that can be overridden at the item level include the email recipients, threshold, and reminder period.

Edit Item Notifications				
Override Learning E	xpiration Notification Defaults			
		Restore Defaults Apply Changes		
Email Recipients:	User Supervisor			
Threshold: (1000)				
Reminder Period: (1000)				

Figure 8. Item Notification Tab - Override Learning Expiration Notification Defaults

Item > Enforce Search for Authorized Instructors

Instructor authorization can be configured using the item record > Instructors tab > Check Instructor Authorization options. An admin can specify that the system must check for instructor authorization to teach the selected item when an instructor is assigned to a scheduled offering.

For pre-existing items is determined based on the following business rules:

- If item has one or more instructors authorized to teach, set to Y
- If item does not have any instructors authorized to teach, set to N

ITEM > NEW ITEM WIZARD RE-DESIGNED

The process for adding an item has been consolidated to one page . SATERN admins can enter minimal information in a simple template for scheduling, ensuring easy and efficient use for even a novice admin.

The new wizard first prompts for the type of item (Figure 9). After selecting **Scheduled Only** for an instructor led item, select **OK**.





The wizard makes it easy to create an item with simple segments. Select **Go to Advanced Schedule** to create more complex segments (Figure 10).

Add New Item	
Summary Change type of item	
Enter Basic Information	Schedule Template
*Required Fields	
*Item Type:	Number of days:
*Item ID:	
*Title:	GO TO Advanced schedule
Description:	Use for more complex schedules.

Figure 10. Consolidated Wizard with Simple Segment Template

Notice warnings that prevent an admin from leaving a required field blank (Figure 11).

*Item ID:	TMS BEST PRACTICES		
		Go To Advanced Schedule	Please fix the validation errors
*Title:	·	Use for more complex schedules	
-		Operating to an provide a serie dates	

Figure 11. Consolidated Wizard with Simple Segment Template

Continue adding fields as prompted (Figure 12).

*Domain ID:	HQ
	Approval Required
Approval Process:	
Credit Hours:	(1000)

Figure 12. Consolidated Wizard (continued)

The remaining fields in the wizard are at the bottom of the screen with the SATERN required fields marked with an asterisk (Figure 13).

Additional Options			
*Revis *Revis Revision	sion Date: 4/14/2012 sion Time: 07:00 PM n Number: 1	*Contact Hours: 12 CPEs: (1000)	

Figure 13. Wizard > Additional Options



Step

- Launch the new item wizard by using a Quick Link from the admin Home page or by typing "add item" in the command Search bar.
- 2. Using your worksheet:
 - a. Select the desired item type, item title, item description, and domain
 - b. Accept the default entry in the Approval Process field, but leave the Approval Required checkbox unchecked for this item
 - c. Enter contact hours
 Reminder: Follow the SATERN admin business rule. Set credit hours
 to zero unless this item grants credit for an academic course.
 - d. Enter the revision date, time, and number.
- 3. Select Save and Exit to continue.

Lab 2. Edit the New Instructor Item

Step

- 1. Edit the **Summary > View All** section of the item record with the relevant fields that were not included in the wizard. At a minimum include:
 - a. Required fields for OPM, including Academic Credit Code, Type of Training Sub-Code, etc.
 - b. Required fields for SATERN business rules, including Source, Audience, Contact E-Mail, etc.
 - c. Fields such as Assignment Type, Min/Max Registration, etc.
- 2. Check new entries for learning expirations on the **Notifications** tab.
- 3. Decide whether to enforce the check for authorized instructors on the **Instructors** tab.
- 4. Add or edit your initial entries on the Segments tab.
- Enable the learner ratings option and record learning for your Learner for this item. Test this functionality from your learner record > Completed Work.
- 6. Work with new functionality for item records:



Use Recommended Next > Add Catalogs and Add Subject Areas



Use the **Personalize Fields** button to select preferred layout for the item record



Check out ways to "jump" from the item record to other related records





Be sure to bookmark your new item

LESSON 1 WRAP UP

After completing this lesson on curricula, you should be able to:

- List key changes to item records, including required fields based on SATERN business rules
- Use the revised new item wizard and add a new instructor-led item
- Practice new functionality such as links between related records, new Actions available, bookmarking, and other shortcuts

TRAIN-THE-TRAINER PREP



Locate and make notes on *Lesson 1: Items* in the **SATERN Learning Needs** <u>Management</u> course book.

Notes



Lesson 2: Deltas for Curricula

This section describes the streamlined experience for SATERN admins who manage curricula.

LESSON 2 OBJECTIVES

- List key changes to curriculum records
- Add a new curriculum with several items on the **Contents** tab
- Practice new functionality such as links between related records, new Actions available, bookmarking, and other shortcuts
- Locate and make notes on Lesson 2 -Curricula in the <u>SATERN Learning Needs</u> <u>Management</u> course book

CURRICULUM > NEW RECORD LAYOUT AND CONFIGURATION

This overview gives a tour of the new record layout with default global configuration. In the next lab, you will create a new curriculum and research its fields and tabs.

Curriculum - Consolidated Record Layout

The curriculum record reflects the new consolidated view (Figure 13).

PA Ethics Training for NASA Employees HQ-ETNE ■ ♀ ♥ Actions						
Description: HQ Ethics Training for NASA Employees					Unbookmark Assign Send Notification	
Creation Dat	te: 12/6/20	07	*Domain:	NASA Headquarters (HQ	Сору	
Curriculum Typ	e:		Active:	Yes	Delete	
Force Incomplet	te: No					
View All						
Related	Contents	Edit			<u></u>	
Assignment Profiles	Туре	Title			Retraining	
Catalogs	Catalogs					
Contents		Ethics Training for NASA Employees 2012			Q	
Documents		HQ-ETHICS IS GOOD BUSINESS TRAINING				
Job Positions	National Government Ethics Conference					

Figure 14. Curriculum Consolidated View

Curriculum > Content Tab for Items, Requirements, and Subcurricula

A new layout enables admins to manage all three types of curriculum content (items, requirement pools, and sub-curricula) from one screen. Figure 15 shows the *Edit the Curriculum* section of the Content tab.

Curricula	Search Add New 🔞
> Search > Search Results >	> Edit Contents
Curriculum ID: EHS-	104
Title: Work	place Safety
Edit the Curriculur Add Content to the C	n urriculum
Item	Enter Item ID or add one or more from list
C Requirement	Туре ID
Subcurriculum	Add
Update Content for th	ne Curriculum

Figure 15. New Contents Tab for Curriculum Record

The other new functionality associated with the **Contents** tab is an option to set a preferred display order (Figure 16). This feature is similar to the sequencing field in SATERN 5.8 SP5 that indicates recommended *item* order.

Update Content for the Curriculum

			Remo	G	roup Requi	rements
				1	Select All / D	eselect All
		Entity ID	Title		Display Order	Select
		EHS-103	Field Operations Safety	Details		
	Ŧ	ONLINE EHS-125 (Rev 1 - May/14/2003 12:00 AM America/New York)	Safety and Health Management	Edit		
	Ŧ	COURSE EHS-126 (Rev 1 - May/14/2003 12:00 AM America/New York)	Security Awareness Education	Edit		
H	Ŧ	EHS_SPECIALTY - 2 items from item pool	EHS Specialty Training - take 2 from pool of 5 items	Edit		
	Ŧ	COURSE EHS-145 (Rev 1.2 - May/14/2003 12:00 AM America/New York)	Chemical Spill Response	Edit		

Figure 16. Content Tab > Display Order Field

The preferred display **does not** dictate the order in which a learner *must* complete the curriculum elements. As in previous versions, the only way to force the order in which learners complete curriculum items is by use of prerequisites.

Curricula > Curricula Can Include Custom Columns

Custom columns can now be used with curricula records. You can use custom fields to assign a value for any custom columns that have been added for this record type. You can view/edit custom fields by navigating to the **Summary > View All > Extended Summary** section.

Curriculum Clean-Up APM Can Include Free-Standing

The Curriculum Clean-up APM from previous versions removed the relationship between an earlier revision of an item and the related curriculum if two (or more) revisions of an item were related to the same curriculum. This is true if both items are effective (have an effective date before today's date)

The Curriculum Clean-up APM contains a checkbox to include free-floating item assignments (Figure 17). An admin should check this box for the system to remove the earlier revision(s) of a free-floating item from the learner's Learning Plan.

Include free-floating Item assignments:

Figure 17. Curriculum Clean Up APM with Free-Floating Item

Lab 3. Create and Edit a New Curriculum

Step

- Launch the new curriculum wizard by using a Quick Link from the admin Home page or by typing "add curriculum" in the command Search bar.
- 2. This is the same wizard as you used in v 5.8 SP5:
 - a. Enter the curriculum ID, title, and description from your scenario worksheet.
 - b. Use today as the creation date and set the curriculum as active.
 - c. Select the domain and curriculum type. Leave **Force Incomplete** unchecked.
 - d. Select Add to save the new record.
- 3. Edit the curriculum record.
- 4. Select the **Contents** tab > Edit button to add items select the green plus mark and select **Items** from the dropdown to open item search:

dit	
Curriculum: HQ Ethics Training for NASA Employee	es
Contents 🔂 -	
There is no clitems	
Requirements	
Subcurricula	

5. Add and configure your items, based on the scenario worksheet.

- 6. Work with new functionality for curriculum records:
 - •

Use Recommended Next > Assign to Learners



Use the **Personalize Fields** button to select preferred layout for the curriculum record



Check out ways to "jump" from the curriculum record to other related records



Be sure to bookmark your new curriculum

LESSON 2 WRAP UP

After completing this lesson on curricula, you should be able to:

- List key changes to curriculum records
- Add a new curriculum with several items on the Contents tab
- Practice new functionality such as links between related records, new Actions available, bookmarking, and other shortcuts

TRAIN-THE-TRAINER PREP



Locate and make notes on *Lesson 2: Curricula* in the <u>SATERN Learning</u> <u>Needs Management</u> course book.



Lesson 3:Deltas for Assignment Profiles

This guide covers changes to assignment profiles introduced between SATERN 5.8 SP5 and version 6.4.

LESSON 3 OBJECTIVES

After completing this lesson, you should be able to:

- List key changes to assignment profiles
- Add a new assignment profile to assign your curriculum to a group of learners
- Practice new functionality such as editing the assignment profile, links between related records, new Actions available, bookmarking, and other shortcuts
- Locate and make notes on Lesson 5: Automated Learning Assignments in the <u>SATERN Learning Needs Management</u> course book

ASSIGNMENT PROFILE RE-DESIGNED

In previous versions, each assignment profile contained one or more **groups**. An admin would add a new group *number* to support an **OR** relationship between attributes. This relationship was not always obvious to admins.

As of 6.4, each group contains a set of **rules**. Adding more than one rule in a group creates an **AND** relationship. The learner must meet ALL rule criteria in a group to be included in the assignment profile (Figure 18).

Set up Rules				
Users will be part of the profile if they have attribute values that match all of the rules defined within at least one group.				
Rule - job code AND organization				
Country V Matches V UK, US				
- AND -				
Job Code ID Contains MGR				

Figure 18. A Group with Multiple Rules

If an admin adds another group, the system creates an **OR** relationship (Figure 19). A learner who matches **all** rules within **any** group is included in this assignment profile.

Set up Rules

Users will be part of the profile if they have attribute values that match all of the rules defined within at least one group.				
Rule - organization is Human Resources	Group			
Organization ID Include Sub Records Of HR				
- OR - Between groups = "OR"				
Rule - job code is for a manager AND country is UK or US				
Country Matches UK, US				
• AND - Within a group, rules = "AND" Group with 2 rules				
Job Code ID Contains MGR				

Figure 19. An Assignment Profile with Multiple Groups

* One change to the assignment profile configuration: When creating a NEW assignment profile, FIRST add a group and its rule(s) *before* adding one or more domains (Figure 20).

Create Assignment Rules			
Define your pool of Learners by creating rules and phrases. Add a domain after you create your rules.			
ОК			

Figure 20. Tip for Creating a New Assignment Profile

For an existing assignment profile, navigate to **Actions > Manage Rules** to add or edit the profile criteria. Select the pencil/edit icon to change an existing rule (Figure 21).



Figure 21. Pencil Icon for Editing an Existing Rule

The **Preview Learners** dialog has been enhanced to give admins more options for viewing learner attributes. Use **Field Choose** to add/remove fields (Figure 22).

Preview Learners X						
Field Chooser						
Learner ID	Learner Name	Organization ID	Job Location	Job Position	Domain ID	
			dep ×			
lbgarver	LORI B GARVER	HQ-AB000	NH-AB000-DEPU	DEPUTY ADMINI	HQ-A	
mdholland	MARY D HOLLAND	HQ-AB000	NH-AB000-DEPU	EXECUTIVE ASS	HQ-A	
rlmcwilliams	RUTH L MCWILLIAMS	HQ-AB000	NH-AB000-DEPU	PROGRAM ANAL	HQ-A	
rjkeegan	RICHARD J KEEGAN	HQ-AB000	NH-AB000-DEPU	ASSOCIATE DEP	HQ-A	
rsgardner	REBECCA L KEISER	HQ-AB000	NH-AB000-DEPU	ASSOC DEP ADA	HQ-A	

Figure 22. Preview Learners with Multiple Fields Chosen



SCENARIO AND WORKSHEET FOR THIS ASSIGNMENT PROFILE

In Lesson 2, you created a new curriculum. You now want to assign the curriculum to a group of **your** Learners.

Spend a few minutes brainstorming a set of attributes (at least 2 + 1 or more domains) that would be realistic for you and for the admins you support.

What domain(s) will you use for the "first pass" as a learner search?

What attribute/field + values will you use for Rule 1:

What attribute/field + values will you use for Rule 2:

Reminder on strategy -- In planning a new assignment profile in 5.8 SP5, you needed to know *ahead of time* how many Learners should be returned at each step of building the profile. So you would first conduct a learner search and use this criteria:

- Search 1: Domain(s) from **Domain** tab + Attribute A with value(s) in Group 1 on the Attributes page = X Learners
- Search 2: Domain(s) from **Domain** tab + Attribute A with value(s) in Group 1 + Attribute B with value(s) in Group 1 on the **Attributes** page = Y Learners

You will want a similar strategy for v 6.4, but the terms and the order of the steps to create the assignment profile are slightly different.

- Search 1: Attribute A with value(s) in Rule 1 + Domain(s) = X Learners
- Search 2: Attribute B with value(s) in Rule 1 + Domain(s) = Y Learners

WORKSHEET FOR THIS LAB

Assignment Profile ID	
AP domain	
AP description	
Domain A for search	
Domain B for search (if needed)	
Rule 1 attribute	
Rule 1 operator	
Rule 1 value(s)	
Rule 1 # of learners	
Rule 2/attribute	
Rule 2 value(s)	
Rule 1+2 # of learners	
Rule Description	



Lab 4. Create a New Assignment Profile

Step

- Navigate to Learners > Assignment Profile or type "add assign ..." in the command Search bar, then select Add Assignment Profile.
- 2. Click Add New.
 - a. Enter the assignment profile ID, description, domain from your worksheet.
 - b. Enter an email address for the person responsible for the assignment profile.
 - c. Enter the **created for** information (the person or group who requested the assignment profile to be created)
 - d. Enter any applicable notes.
 - e. Click Add.
- 3. In the Recommended Next: box, click **Define Learner Pool**.
- 4. Click **OK** on the *Create Assignment Rules* pop-up message.
- In the Set up Rules section, select attribute 1, such as Job Location ID from the Select Attribute drop-down menu.
- 6. Select Matches from the Select Operator drop-down menu.
- In the values box (currently blank), enter 1 or 2 values from your worksheet. You can also use the magnifying glass icon to search for the desired values.
- 8. Click Save.
- 9. In the Set up Domain section, click Add Domain(s).

- 10. Enter criteria to search for the desired domains from your worksheet.
- 11. Click Search.
- 12. Check the **Top Level Only** or **Include Subdomain** checkbox.
- 13. Click Add and click Save (you cannot preview before saving).
- 14. Click **Preview Learners in Assignment Profile** to see which learners currently match the criteria:
 - a. Use the new filter and **Field Chooser** to check the learners and their details.
 - b. Confirm that this group of learners matches your prediction from your worksheet.
- 15. Close the preview window.
- 16. Repeat steps 5 through 8 to add the second attribute/rule.
- 17. Click Add and click Save.
- 18. Click **Preview Learners in Assignment Profile** to see which learners currently match the criteria confirm that this group matches your worksheet prediction.
- 19. Close the preview window.
- 20. In the Set up Rules section, click in the **Untitled Rule 1** box and enter a rule description this description is for BOTH attributes in this rule.
- 21. Click Save.
- 22. Click **Cancel** to return to the main assignment profile screen.
- 23. In the Recommended Next: box, click Add Curricula.

- 24. Click Add New Curricula (
- 25. Enter criteria to search for your curriculum from Lesson 2.
- 26. Click **Search** and check the **Add** checkbox for the curriculum to associate with the assignment profile.
- 27. Click Add.
- 28. In the Actions area, click Propagate. The system may require you to schedule this as a background job. Once this job runs, all learners with the attributes you specified will be assigned the selected curricula.



NOTE: Once the assignment profile has been successfully propagated, use the **Existing Learners in Assignment Profile** link in the Actions area to display the learners that are currently being impacted by the assignment profile.

LESSON 3 WRAP UP

After completing this lesson, you should be able to:

- List key changes to assignment profiles
- Add a new assignment profile to assign your curriculum to a group of learners
- Practice new functionality such as editing the assignment profile, links between related records, new Actions available, bookmarking, and other shortcuts
- Locate and make notes on Lesson 5: Automated Learning Assignments in the SATERN Learning Needs Management course book

COURSE WRAP UP

- Identify changes to items, curricula, and assignment profile records including new wizards, record layout, SATERN required fields, and bookmarking
- Log in to the admin side of SATERN and demonstrate steps to access new and revised items, curricula, and assignment profiles
- Locate and make notes on the <u>SATERN Learning Needs Management</u> course book that help you prepare to train your administrators