

SATERN

System for Administration, Training, and Educational Resources for NASA

National Aeronautics and
Space Administration



SATERN Deltas 5.8 SP5 – 6.4: Scheduling Management

Exercise Guide

**(Version 6.4)
May 2012**



For SATERN v 6.4

Last Modified 4/30/2012

The software described in this document is furnished under a license agreement. The software may be used only for learning and development purposes of the NASA employees. No part of this training may be reproduced or transmitted in any form or by any means, electronic or mechanical, without the express written permission of NASA.

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

Scheduling Introduction	1
Course Objectives	2
References Related to Scheduled Management	2
Lesson 1: Deltas for Adding Scheduled Offerings.....	3
Lesson 1 Objectives	3
New Wizard for Add Scheduled Offering	4
Lab 1. Add a New Scheduled Offering	5
Lab 2. Research the New Offering Record Layout	6
Lesson 1 Wrap Up.....	7
Lesson 2: Deltas for Adding/Editing Segments	9
Lesson 2 Objectives	9
New Steps to Edit Segments	10
View/Edit Segments as Calendar or List View.....	10
New Interaction for Managing Resources.....	10
New Steps to Add or Copy Segments.....	11
Lab 3. Add Segments to a Scheduled Offering.....	12
Lesson 2 Wrap Up.....	13
Lesson 3: Deltas for Managing Registration	15
Lesson 3 Objectives	15
Changes for Managing Registration.....	16
Lab 4. Register and Cancel Learners for the Scheduled Offering.....	18
Admins Can Record Attendance per Segment	19
Lesson 3 Wrap Up.....	20

Scheduling Introduction

You will find significant enhancements to SATERN, extending core strengths and making administrator tasks easier and more efficient.

Key enhancements related to schedule management since 5.8 SP5 include:

- ◆ Scheduled offerings can be bookmarked to support short cuts/favorites
- ◆ Re-design and simplification of *Add New Scheduled Offering* wizard
- ◆ Consolidation of record layout for easier access and editing, managing registration, etc.
- ◆ Ability to jump from a scheduled offering to its associated item record



This icon in a bulleted list or lab indicates that the feature or layout is new in version 6.4. Be sure to practice the new functionality during at least one lab.

COURSE OBJECTIVES

- ◆ List key changes to management of scheduled offerings
- ◆ Log in to the admin side of SATERN and demonstrate steps to create and edit scheduled offerings
- ◆ Identify changes to scheduled offerings records including record layout, required fields, and bookmarking
- ◆ Research changes to scheduled offering search
- ◆ Locate and make notes on the SATERN Schedule Management course book that help you prepare to train your administrators

REFERENCES RELATED TO SCHEDULED MANAGEMENT



Admin Introduction course book

Delta Document - Changes from SATERN 5.8 SP5 through 6.4

Lesson 1: Deltas for Adding Scheduled Offerings

This section describes changes to the new scheduled offering wizard and to the scheduled offering record layout that you will find in SATERN v64.

LESSON 1 OBJECTIVES

- ◆ Identify key changes to steps in adding and editing scheduled offerings
- ◆ Demonstrate steps to manage registration using the new consolidated offering record
- ◆ Show how to use cross-linked records for easy navigation between offering records and item records

NEW WIZARD FOR ADD SCHEDULED OFFERING

You can now add scheduled offerings from four locations:

- ◆ From Welcome page, click the **Add Scheduled Offering** quick link
- ◆ 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 launch the new scheduled offering wizard (Figure 1).

Add New Scheduled Offering Help

* = Required Fields

1. Summary Information

* Type: ☒ Item ☐ Schedule Block

* Item Type:

* Item ID:

Description:

* Domain:

Catalogs: ☐ Publish in all associated catalogs
Catalogs may be individually removed from the Scheduled Offering.

2. Schedule Information

* Start Date:

* Start Time:

* Time Zone:

3. Resources

Facility:

Primary Location:

Primary Instructor:

Equipment:

Resource Usage View:

Figure 1. Add New Scheduled Offering Wizard



Lab 1. Add a New Scheduled Offering

Step

1. Verify the **Admin** tab is selected.
2. Go to the record for the instructor-led item you created in an earlier lab and confirm that the item is ready to schedule.
3. Select the **Schedule** link to open the new wizard.
4. Enter a description for this scheduled offering.



This description can now be included in the registration notification.

5. Check the **Publish in all associated catalogs** checkbox.
6. Select a start date, start time, and time zone.
*Click **Preview** to view the basic information for the offering.*
7. Select a facility from the **Facility** drop-down menu.
8. Test the authorization you defined in the item.
9. Click **Save**, responding to the *Warning Details* screen if relevant.
10. The scheduled offering record displays.
11. Select **Actions > Bookmark**.



Lab 2. Research the New Offering Record Layout

Step

1. Spend 10 minutes and explore the new scheduled offering record layout.

OCFO BRIEFING FOR NEW SUPERVISORS 58175

Description:
New supervisor briefing

Item:	COURSE LARC-OBNS (Rev 9/17/...	Approval Process:	1STEP SUPER (1STEP SUPER)
Approval Required:	Yes	*Domain:	Default Public Access Domain
End Date:	5/22/2012	End Time:	05:00 PM
*Facility:	WWF-BUILDING F3 (WWF-	Instructor:	JACQUES ABADIE
Start Date:	5/21/2012	Start Time:	08:30 AM

Related More **Registration** Add Learners:

Registration **Non-enrolled** Cancelled (1) **Enrolled (7)** Total (10) | Open (3) | Slots (0)

Non-enrolled Filter Sort By: Registration

WILSON
JENNIFER

Enrolled Filter for Enrolled Learner

Mitchell James
WILSON JAMES
WILES JENNIFER
WRIGHT JAMES

Actions
Unbookmark
Copy
Cancel the Sche...
Delete
Send Notification

2. Identify the new required field, based on SATERN business rules.
-
3. Use the **Personalize Fields** button to select your preferred layout.
 4. View the **Recommended Next** actions.
 5. Look through the lesson and make several changes to the **summary** area of the record, then locate the new set of prompts for **Save** or **Cancel**.
 6. Go to the **Segments** tab and make several changes to assigned resources.
 7. Locate the cross entity linking between the scheduled offering record and its related item.

LESSON 1 WRAP UP

After completing this lesson, you should be able to:

- ◆ Identify key changes to the new scheduled offering wizard
- ◆ Access an offering record and locate new required fields
- ◆ Add, edit, and organize bookmarks for scheduled offering records

TRAIN-THE-TRAINER PREP



Locate and make notes on *Lesson 1: Scheduled Offerings* in the SATERN Schedule Management course book.

Notes

Lesson 2: Deltas for Adding/Editing Segments


This section discusses changes to steps for adding or editing segments in existing scheduled offerings.


LESSON 2 OBJECTIVES

- ◆ Access the new layout for the scheduled offering record and edit segments
- ◆ Add additional resources, copy segments, and make other changes to the offering

NEW STEPS TO EDIT SEGMENTS

View/Edit Segments as Calendar or List View

The initial view of segments is a calendar view (). You can:

- ◆ **double-click** the calendar entry to gain access to the edit dialog
- ◆ use the list view icon () to switch the view, then select a segment to edit

New Interaction for Managing Resources

Resource search results now include a column that displays the resource availability, which can help when determining the segment resource allocation:

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

When done, you can click **Apply to All Segments** to copy the resources to all other segments of the scheduled offering.

New Steps to Add or Copy Segments

You can add a new segment to the scheduled offering by either clicking the **Add New Segments** button (Figure 2) or by clicking the **Copy Segments** icon (Figure 3).

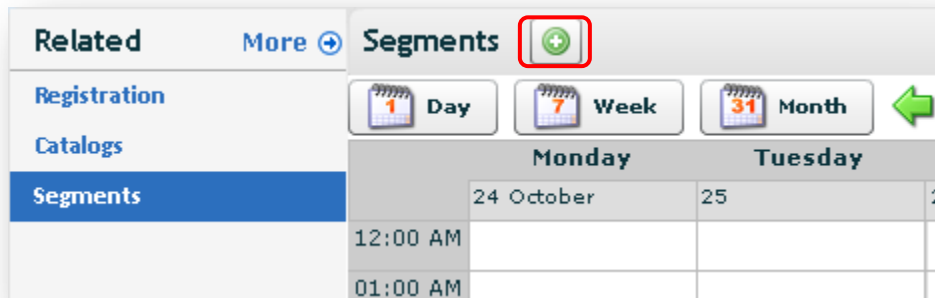


Figure 2. Add New Segment to the Scheduled Offering

The **Copy Segments** icon is only available in list view.

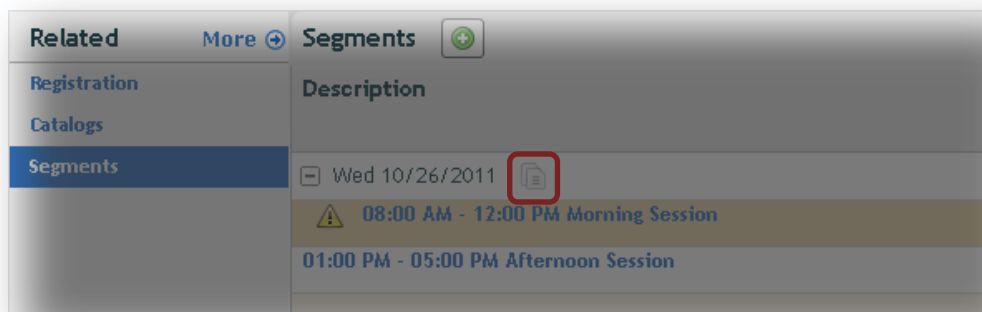


Figure 3. Copy Daily Segments



Lab 3. Add Segments to a Scheduled Offering

Step

1. Select the **Segments** tab from the **Related** area of your scheduled offering.
2. Click the **Add New Segments** button.
3. Enter the segment information:
 - a. Start date and time
 - b. End date and time
 - c. Segment description (optional but recommended)
 - d. Click **Add Resources** to add instructors, locations, etc.
4. Click **Save** to save your changes and continue to modify the segment details, or click **Save and Close** to return to the Segments tab.
5. Copy this segment to create another new segment:
 - a. Navigate to the segment you just created.
 - b. Click the **List View** icon.
 - c. Next to the segment just created, click the **Copy Segments** icon.
 - d. Enter the number of times to copy the segment.
 - e. Click **Copy**.
 - f. View the new segment(s) and modify the description.
 - g. Click **Save and Close**.

LESSON 2 WRAP UP

After completing this lesson, you should be able to:

- ◆ Access the new layout for the scheduled offering record and edit segments
- ◆ Add additional resources, copy segments, and make other changes to the offering

TRAIN-THE-TRAINER PREP



Locate and make notes on *Lesson 2: Segments* in the SATERN Schedule Management course book.

Notes

Lesson 3:

Deltas for Managing Registration

This lesson gives SATERN admins a chance to research changes to the way that you manage registration in version 6.4.

LESSON 3 OBJECTIVES

- ◆ Identify changes to managing registration for SATURN learners
- ◆ Access the new registration layout and enroll learners in the offering
- ◆ Change the status of an enrolled learner to cancel led or waitlisted
- ◆ Record a learner's attendance for each segment (if desired)
- ◆ View the scheduled offering registration status from the item bookmark

CHANGES FOR MANAGING REGISTRATION

Go to your offering record and select **View All** to display the Additional Settings window.

Scroll down to the *Registration* section to view and edit the registration details for the scheduled offering (Figure 4).

Registration			
Email confirmation to the Instruct...	No	Email confirmation to the Supervis...	No
Email confirmation to the User:	No	Email confirmation to the Contacts:	No
Enable Users to Waitlist:	Yes	Maximum Registration:	25
Minimum Registration:	5	Registration Cut-off Date:	MM/DD/YYYY
Registration Cut-off Time:		Registration Cut-off Time Zone:	
Published Price:	0.00 US Dollar (USD) (Default)	Self Registration:	Yes
Auto Fill Registration:	Yes		

Figure 4. Scheduled Offering Registration Details

Registered learners are displayed in the new layout from the **Registration** tab (Figure 5).

The screenshot displays the 'Registration' tab in the SATERN system. On the left, a sidebar shows 'Related' items: 'Registration' (selected), 'Catalogs', and 'Segments'. The main content area has a 'Registration' header with an 'Add Learners' button (green plus icon) and 'Settings' and 'Advanced' buttons. Below the header, there are two main sections: 'Non-enrolled' and 'Enrolled (7)'. The 'Non-enrolled' section has a 'Waitlisted (0)' dropdown and a 'Filter' input. The 'Enrolled (7)' section has a 'Total (10)' | 'Open (3)' | 'Slots (0)' summary and a 'Filter for Enrolled Learner' input. Below the filter, there are four learner cards: Mitchell James, WILSON JAMES, WILES JENNIFER, and WRIGHT JAMES.

Figure 5. Related Area of Scheduled Offering Record: Registration

To register a learner, select the **Add Learners** button (Figure 6).

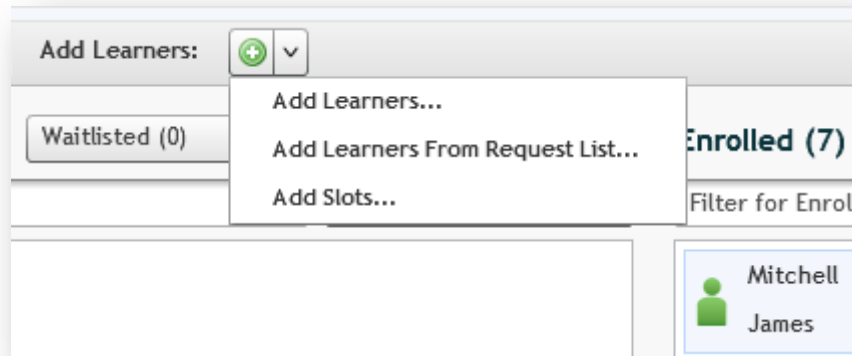


Figure 6. Add to Registration Menu Button and Options

When adding learners to the registration, a pop-up window displays email confirmation checkboxes. You can edit the defaults for THIS scheduled offering by selecting the **Settings** option (Figure 7).

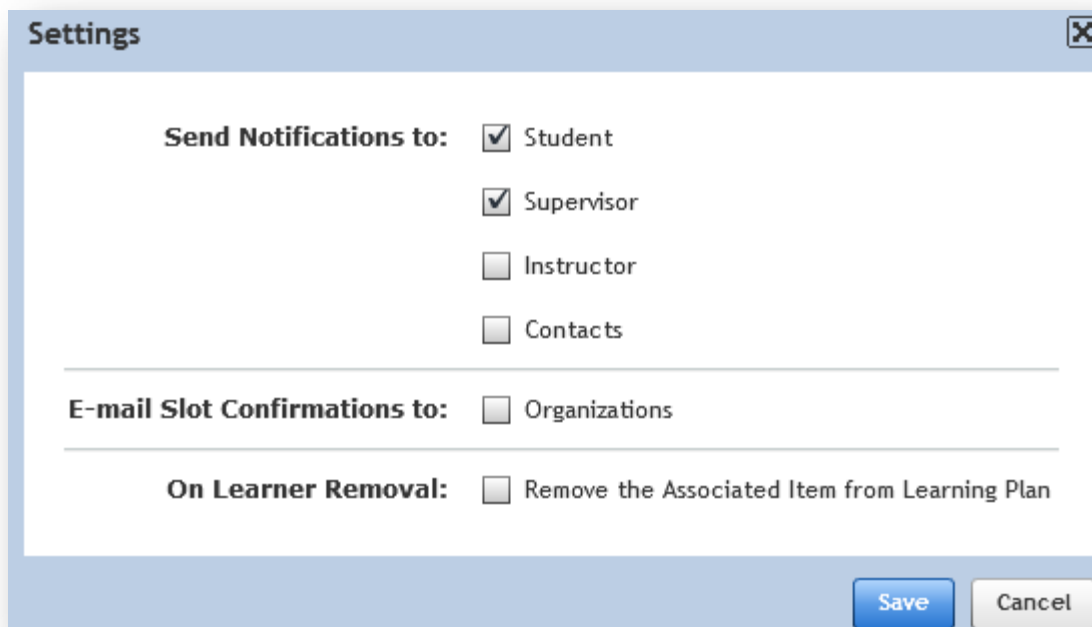


Figure 7. Scheduled Offering > Settings Options

The default settings of these checkboxes are configured globally for SATURN.



Lab 4. Register and Cancel Learners for the Scheduled Offering

Step

1. Access your scheduled offering and select the **Registration** tab from the **Related** area.
2. Select **Add Learners**, then search for and add several learners with an **Enrolled** status.
3. Check the appropriate **email confirmations** (at the bottom of the search results page) and click **Add**.
4. View the learners who are registered for the offering, scrolling your mouse over each learner card to view enrollment details.
5. Cancel a learner by hovering over the learner and select **Modify**, or dragging one learner from the **Enrolled** panel and dropping the learner to the **Non-Enrolled > Canceled** panel. Save when prompted and add comments.

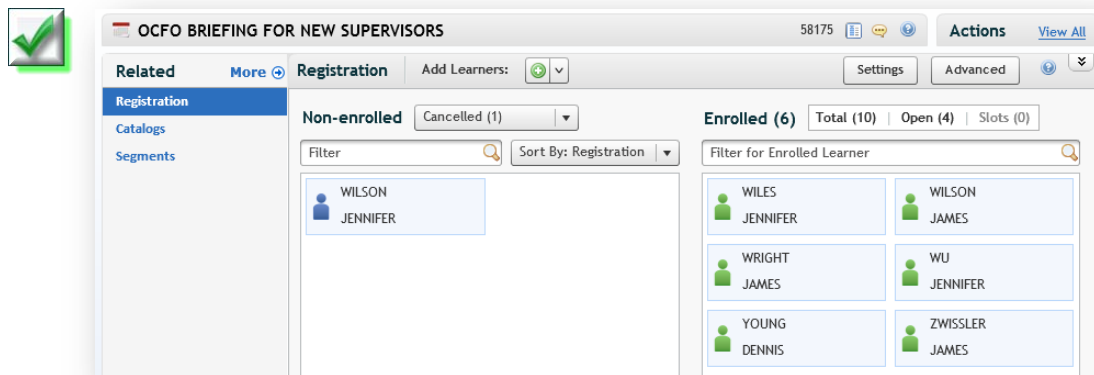


Figure 8. Enrolled and Non-Enrolled > Canceled Panels

6. Access the **scheduled offering** bookmark and view registration from this summary.
7. Access the **item** bookmark and view the scheduled offerings for your item. Notice that the lists is only for offerings with a future start date.

ADMINS CAN RECORD ATTENDANCE PER SEGMENT

SATURN admins can now track attendance based on each learner for each segment.

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 9).

NOTE: The Attendance link is only available in list view.

Record Attendance

Segment 75323 - Session 1 AM

Learner ID	Learner Name	Attendance	Comments
Select All/Deselect All			
jmittchell	Mitchell, James X	<input type="checkbox"/>	<input type="text"/>
C-jwiles	WILES, JENNIFER M	<input type="checkbox"/>	<input type="text"/>
jlwilson1	WILSON, JAMES L	<input type="checkbox"/>	<input type="text"/>
jwwright	WRIGHT, JAMES W	<input type="checkbox"/>	<input type="text"/>
C-jkwu	WU, JENNIFER K	<input type="checkbox"/>	<input type="text"/>
C-dhyoung	YOUNG, DENNIS H	<input type="checkbox"/>	<input type="text"/>
C-jgzwissler	ZWISSLER, JAMES G	<input type="checkbox"/>	<input type="text"/>

[Apply Changes](#) [Copy to Same Day Segments](#)

Figure 9. Record Attendance for Each Segment

You can record the learner's attendance by clicking the checkbox in the **Attendance** column. Enter any comments 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 users 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 3 WRAP UP

After completing this lesson, you should be able to:

- ◆ Identify changes to managing registration for SATURN learners
- ◆ Access the new registration layout and enroll learners in the offering
- ◆ Change the status of an enrolled learner to cancel led or waitlisted
- ◆ Record a learner's attendance for each segment (if desired)
- ◆ View the scheduled offering registration status from the item bookmark

TRAIN-THE-TRAINER PREP



Locate and make notes on *Lesson 3: Registration* in the SATERN Schedule Management course book.

COURSE WRAP UP

- ◆ List key changes to management of scheduled offerings
- ◆ Log in to the admin side of SATERN and demonstrate steps to create and edit scheduled offerings
- ◆ Identify changes to scheduled offerings records including record layout, required fields, and bookmarking
- ◆ Research changes to scheduled offering search
- ◆ Locate and make notes on the SATERN Schedule Management course book that help you prepare to train your administrators

Notes