

Job Aid: Edit Instructor-Led Items**Course: Learning Needs Management**

Lab 2: Adding Information to an Item's Core Area

Lab 3: Working with Item Default Segments

Lab 4: Adding an Item to a Catalog

Lab 5: Adding Subject Areas to an Item

Description

The purpose of this job aid is to guide Administrators through the step-by-step process of editing an instructor-led item. Related terminology is provided.

Tasks

- A. Review Core Information
- B. Configure Item: Default Segments (Related Area)
- C. Configure Item: Catalogs (Related Area)
- D. Configure Item: Subject Areas (Related Area)
- E. Configure Item: Notifications (Related Area > More)

Terminology:**Related Area:**

Segments Tab: A segment is used to establish schedule timeframes and identifies location types, materials, and types of equipment for scheduling an instructor-led course.

Catalog Tab: A catalog is used to make items that are not a part of the Learning Plan viewable to Learners. Access to one or more catalogs is based on assignment profiles. In order for a Learner to view an item that is not in his/her Learning Plan, the admin must add the item to a catalog. An item may reside in multiple catalogs and have a different price associated in each. In order for a Learner to self-assign an item or self-register in a scheduled offering of an item, the item must reside in a catalog.

Subject Area Tab: Learners have the ability to browse catalog/s by subject area. An item can be associated with one or more subject areas.

Related Area (More):

Notification Tab: Learners have the ability to change the message within the notification associated with an item and to attach additional documents to the notification such as pre-reading or work.

Task A. Review Core Information

Verify the **Admin** tab is selected.

- 1 Navigate to **Learning > Items**.
 - 2 Enter search criteria for an item to edit.
 - 3 Click **Search**.
- or
- 4 Enter search criteria into the top Search field.
 - 5 Click **Go**.

The screenshot shows the SATERN Admin interface. The 'Admin' tab is selected in the top navigation bar. On the left, the 'Items' menu is highlighted. The main content area shows a search form with various filters. A search bar at the top contains 'NASA-SAT'. A search button is visible. The interface includes a sidebar with navigation options like Home, Learners, Performance, Learning, Content, Commerce, and System Admin. The search results section is partially visible at the bottom.

From the search results, click the **Item ID**.

The screenshot shows the search results page. It features a 'Field Chooser' and a 'Download Search Results' link. The results are displayed in a table with columns for 'Item' and 'Title'. Two records are visible: 'COURSE NASA-SAT-09-TTT-SESSION1One (Rev 8/25/2009 10:26 AM America/New York)' and 'COURSE NASA-SAT-12-T3 (Rev 1 - 4/3/2012 09:32 AM America/New York)'. The 'Item ID' of the second record is circled in red.

The top of the record displays the items title, ID, description, and item key.

Verify **Classification** is either **Instructor-Led** or **Blended**.

Note: To edit any field in this area, click in the field and enter text or select a reference value (depending on the field type).

View additional information by clicking **View All**.

The screenshot shows the details page for the selected item. It includes a description and a table of metadata. The 'Classification' field is set to 'Instructor-Led'. The 'View All' link is circled in red. The table contains the following information:

*Training Vendor (ORG ID):	SUCCESS FACTORS	*Academic Credit Code:	05 (N/A)
Funding Organization:		Metrics That Matter (MTM):	N (NO)
*Type of Training Sub-Code:	01-05 (Human Resources)	*Source of Training:	03 (Non-government)
*Source:	Internal (INTERNAL)	*Indirect Cost Code:	0 (No Indirect Cost)
*Direct Cost Code:	0 (No Direct Cost)	*Contact Hours:	28.00
*Audience:	SATERN Administrator Leads	*Training Credit Type Code:	D4 (Not Applicable)
Classification:	Instructor-Led	*Domain:	NASA (NASA)
Item Goals:		Approval Process:	
Approval Required:	No	Assign. Type:	Highly Recommended (RECOMMENDED)
*Contact's Email:	james.s.mitchell@nasa.gov	Credit Hours:	

Note: All required fields are marked with a red asterisk.

Task B. Configure Item: Default Segments (Related Area)

Verify the **Admin** tab is selected.

1 Using the same item record as above, select the **Segments** tab in the **Related** section of the record.

2 Click the arrow icon (⤴) to expand the **Related** section.

*Note: Click the arrow icon (⤴) again to collapse the **Related** section.*

Search Results

SATERN 6.4 Upgrade - Train the Trainer

COURSE NASA-SAT-12-T3 (Rev 1 - 4/3...)

Description: Through lecture, activities, and hands on computer lab work, the Train the Trainer (T3) course provides participants with a complete overview of SATERN 6.4. Emphasis is placed on key differences between SATERN 5.8.5 and SATERN 6.4 and participants will be able to teach other Administrators and Users back at their centers.

*Training Vendor (ORG ID): SUCCESS FACTORS

*Academic Credit Code: 05 (N/A)

*Funding Organization: 01-05 (Human Resources)

*Metrics That Matter (MTM): N (NO)

*Type of Training Sub-Code: 01-05 (Human Resources)

*Source of Training: 03 (Non-government)

*Source: Internal (INTERNAL)

*Indirect Cost Code: 0 (No Indirect Cost)

*Direct Cost Code: 0 (No Direct Cost)

*Contact Hours: 28.00

*Audience: SATERN Administrator Leads

*Training Credit Type Code: 04 (Not Applicable)

Classification: Instructor-Led

*Domain: NASA (NASA)

Item Goals:

Approval Process:

Approval Required: No

Assign. Type: Highly Recommended (RECOMMENDED)

*Contact's Email: james.l.mitchell@nasa.gov

Credit Hours:

View All

Related

Segments

Description	Duration	Delay Start	Location Type	Actions	Delete
Day 1					
Morning	4.00		Computer Equip	Equipment	<input type="checkbox"/>
Afternoon	4.00	1.00	Computer Equip	Equipment	<input type="checkbox"/>
Day 2					
Morning	4.00		Computer Equip	Equipment	<input type="checkbox"/>
Afternoon	4.00	1.00	Computer Equip	Equipment	<input type="checkbox"/>

The item displays with segments.

3 Enter a description for each existing segment.

4 Change the duration for each segment as necessary.

5 Select a **Location Type** from the drop-down menu.

6 Click the **Equipment** link to associate equipment with the segment.

7 Click **Copy to All** link to apply that segment configuration to all segments (use only if you expect all segments to be identical).

8 Click **Save**.

9 Click (⊕) to add a new segment.

Search Results

SATERN 6.4 Upgrade - Train the Trainer

COURSE NASA-SAT-12-T3 (Rev 1 - 4/3...)

Related

More

Segments

Description	Duration	Delay Start	Location Type	Actions	Delete
Day 1					
Morning	4.00		Computer Equip	Equipment	<input type="checkbox"/>
Afternoon	4.00	1.00	Computer Equip	Equipment	<input type="checkbox"/>
Day 2					
Morning	4.00		Computer Equip	Equipment	<input type="checkbox"/>
Afternoon	4.00	1.00	Computer Equip	Equipment	<input type="checkbox"/>
Day 3					
Morning	4.00		Computer Equip	Equipment	<input type="checkbox"/>
Afternoon	4.00	1.00	Computer Equip	Equipment	<input type="checkbox"/>

Save Cancel

10 Enter a Day, Description, Duration, Delay Start and Location Type, as necessary.

11 Click **Save**.

Add New Segment

* Day: 5

Description: Mid-day

* Duration: 1

Delay Start:

Location Type: Computer Equipped Classroom (CLASS-PC)

Save Cancel

12 The new segment has been added.
 12 Click (📄) to copy segments.

Search Results

SATERN 6.4 Upgrade - Train the Trainer

COURSE NASA-SAT-12-T3 (Rev 1 - 4/3...)

Related	More	Segments	Description	Duration	Delay Start	Location Type	Actions	Delete
Online Content			Day 1					
Catalogs			Morning	4.00		Computer Equip	Equipment	<input type="checkbox"/>
Competencies							Copy To All	<input type="checkbox"/>
Curricula			Afternoon	4.00	1.00	Computer Equip	Equipment	<input type="checkbox"/>
Prerequisites							Copy To All	<input type="checkbox"/>
Subject Areas			Day 2					
Substitutes			Morning	4.00		Computer Equip	Equipment	<input type="checkbox"/>
Scheduled Offerings							Copy To All	<input type="checkbox"/>
			Afternoon	4.00	1.00	Computer Equip	Equipment	<input type="checkbox"/>
							Copy To All	<input type="checkbox"/>
			Day 3					
			Morning	4.00		Computer Equip	Equipment	<input type="checkbox"/>
							Copy To All	<input type="checkbox"/>
			Afternoon	4.00	1.00	Computer Equip	Equipment	<input type="checkbox"/>
							Copy To All	<input type="checkbox"/>
			Day 4					
			Morning	4.00		Computer Equip	Equipment	<input type="checkbox"/>
							Copy To All	<input type="checkbox"/>
			Afternoon	4.00	1.00	Computer Equip	Equipment	<input type="checkbox"/>
							Copy To All	<input type="checkbox"/>
			Day 5					
			Mid-day	1.00	0.00	Computer Equip	Equipment	<input type="checkbox"/>
							Copy To All	<input type="checkbox"/>

13 Enter the number of times to copy the set of segments.
 14 Click Copy.

Copy Segments for Selected Day

Day	Description	Duration	Delay Start	Location Type
5	Mid-day	1	0	CLASS-PC

*Number of Times to Copy: 1

Copy Cancel

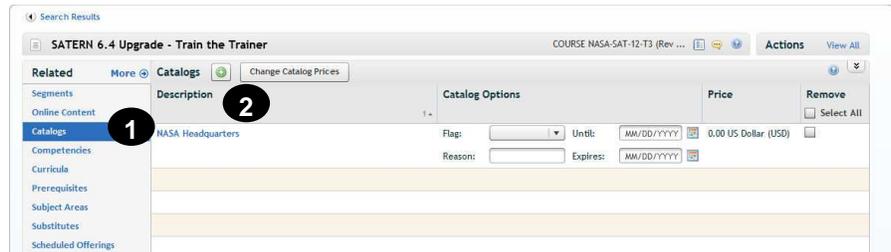
The previous segment(s) have now been copied and added to a new day.
Note: To remove one or more segments, select the **Delete** checkbox, and click **Save**.

Description	Duration	Delay Start	Location Type	Actions	Delete
Day 5					<input checked="" type="checkbox"/> Select All
Mid-day	1.00	0.00	Computer Equip	Equipment	<input type="checkbox"/>
				Copy To All	<input type="checkbox"/>
Day 6					<input checked="" type="checkbox"/>
Mid-day	1.00	0.00	Computer Equip	Equipment	<input checked="" type="checkbox"/>

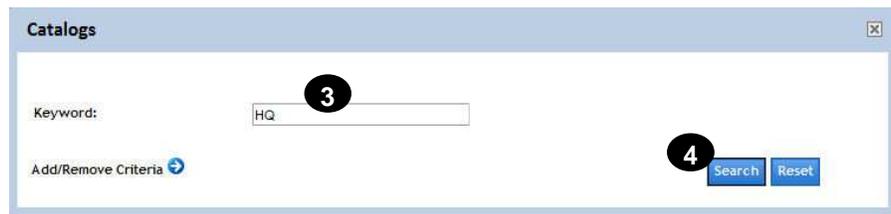
Save Cancel

Task C. Configure Item: Catalogs (Related Area)

- 1 Using the same item record as above, select the **Catalogs** tab in the **Related** section of the record.
If the item is associated with a catalog already, the catalog(s) will be listed.
- 2 Click (+) to associate the item with a new catalog.



- 3 Enter a keyword.
- 4 Click **Search**.
Note: To use additional search criteria, click the Add/Remove Criteria button.



- 5 Select the **Add Schedules** and **Add** checkboxes.
- 6 Click **Add**.



- 7 To modify catalog options, click the **Flag** drop-down box and select one of the displayed options.
- 8 Enter an **Until** date.
- 9 Enter a **Reason**.
- 10 Enter an expiration date (if desired).
- 11 Click **Save**.



Notes:

Item Flag: A flag that appears with the item in the catalog.

Until: The date that the flag no longer appears with the item in the catalog.

Reason: What the Learner sees for why they should be interested in this item when viewed on their home page or in the catalog.

Expires: The date at which the item is automatically removed from the catalog. It is automatically removed after this date from the catalog by the purged expired catalog APM.

Task D. Configure Item: Subject Areas (Related Area)

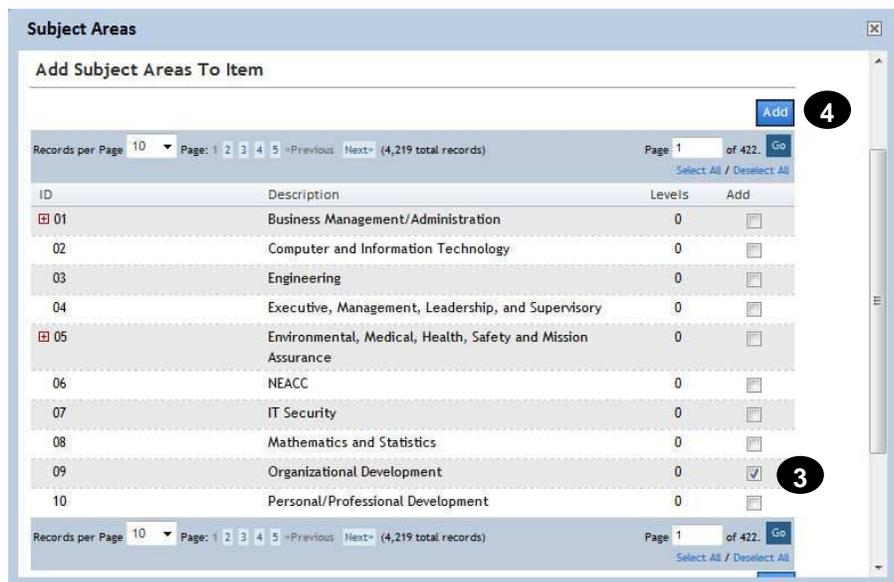
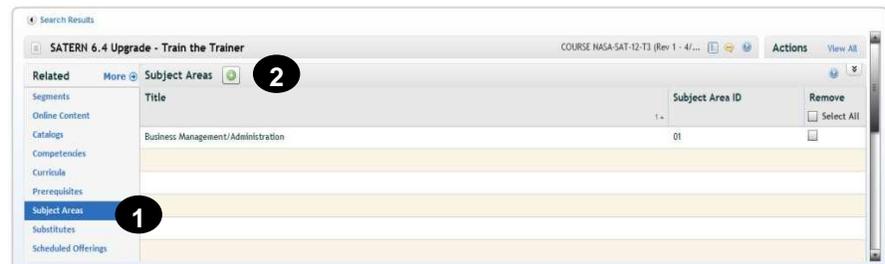
1 Using the same item record as above, select the **Subject Area** tab in the **Related** section of the record.

If the item is associated with a subject area already, the subject area(s) will be listed.

2 Click (+) to associate one or more subject areas with the item.

3 Check the **Add** checkbox to add a subject area.

4 Click **Add**.



Verify the subject area(s) added appear on the screen.



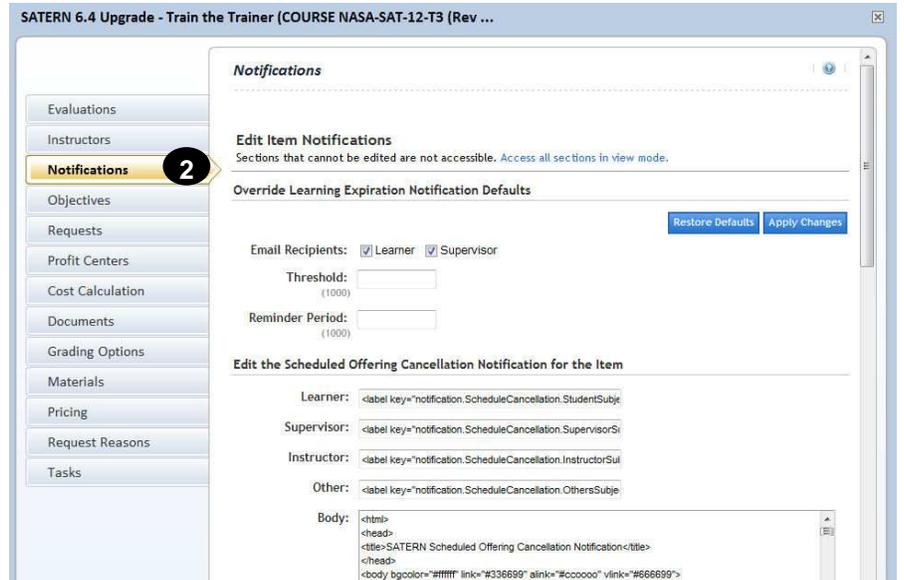
Note: Learners can search for items based on subject area.

Task E. Configure Item: Notifications (Related Area > More)

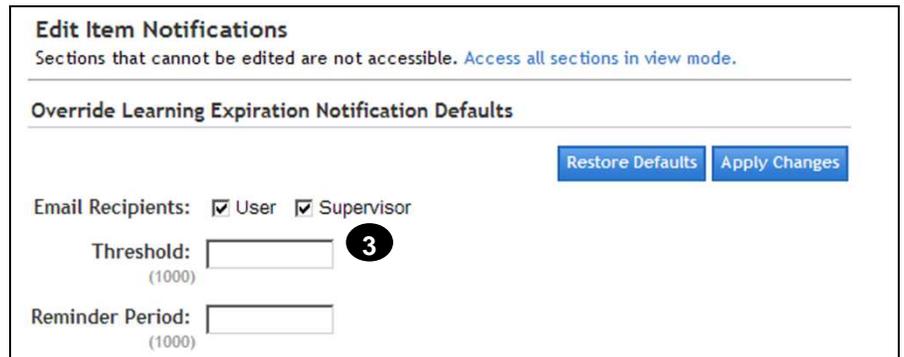
1 Using the same item record as above, select the **More** link in the **Related** section of the record.



2 Additional related tabs display. Select the **Notifications** tab.



3 In the section *Override Learning Expiration Notification Defaults*, select the email recipients, threshold, and reminder period.



Note: After you add a new item, you can change these default values and selections. When the automatic process executes, the system uses the values and settings of the item.

This page allows you to review and change the content of notifications sent to Learners, Instructors, Supervisors, and others regarding this item.

The following notifications are available:

- Scheduled Offering Cancellation
- Registration
- Withdraw
- Waitlist
- Waitlist Removal
- Pending

4 Make necessary edits to the notification subject line and body.

5 Click **Preview** to view a sample of the notification.

Click **Apply Changes**.

6 To add an attachment, click **Browse...** to search for and add a file.

7 Click **Apply Changes** once the correct path to the attachment displays.

Edit the Scheduled Offering Cancellation Notification for the Item

User:

Supervisor:

Instructor:

4 Other:

Body:

5

Attachment for Scheduled Offering Cancellation Notification **6**

Current Attachment:

New Attachment: **7**

8

*Note: For examples about the use of Notification Template and building messages using syntax tags, click the **Help** link.*