e-Training Transition Project

SATERN *Phase II Training Guide*

Version 1

February 28, 2006

National Aeronautics and
Space Administration

SATERN Phase II Training Guide

February 28, 2006

Approved by:

Sheila Fogle	Date
e-Training Transition Project Manager	

Dennis Conrad	Date
e-Training Transition Deputy Project Manager	

TABLE OF CONTENTS

INTRODUCTION

PURPOSE

The implementation of the e-Training Project's System for Administration, Training, and Educational Resources for NASA (SATERN) will cause a change to existing training processes. The purpose of this *Phase II SATERN Training Guide* is to help Centers and Disciplines address the training challenges they will face when implementing SATERN, particularly those related to resources, logistics, and scheduling learning activities.

One of the biggest training challenges that Centers and Disciplines should expect to encounter is providing each affected employee with the appropriate opportunities to receive training on SATERN, giving them the confidence to be self-sufficient with the new training process and system.

This guide specifically addresses the Phase II implementation and provides information that Centers and Disciplines can use in planning for SATERN training. Additional guides or updates will be provided for other change management areas and for subsequent phases.

BACKGROUND

e-Training is one of the President's Management Council approved e-Government initiatives, supporting the President's Management Agenda (PMA) for improving the Government's responsiveness to citizens and efficiency of operations. The vision of the initiative is to create a premier e-training environment that supports the development of the NASA workforce through simplified and one-stop access to high quality training products and processes to support learning and development.

Through the implementation of a centralized LMS, the training community within NASA will have new tools, functionality and capabilities for training administration and delivery. Three legacy systems will be transitioned to SATERN:
- AdminSTAR (Administrative Schedule, Track, Access, Report) – training administration system used by all Center training offices
- NASA Online Registration System (NORS) – allows students to register online for courses and is integrated with AdminSTAR, (at MSFC and KSC), and
- Site for Online Learning and Resources (SOLAR) – online custom content courseware system used throughout NASA

NASA has selected the Plateau LMS software, a comprehensive application which will enable process standardization and provide timely, up-to-date information. Centers will be able to identify training requirements, deploy learning and track its completion. The Plateau system will also allow for tracking of certifications, and assessment of competencies. It provides desktop access to training information and courses, online enrollment and testing, course catalogs and facility management.

ROLES AND RESPONSIBILITIES

At the Agency level, the SATERN Project, through the Change Management Team, will assess training needs and develop an approach for training for the various SATERN roles. A key responsibility of the Change Management Team is to ensure that the knowledge to deliver training transfers to the Centers and Disciplines. With support from the OPM contractors, the project will use a train-the trainer- approach to train lead administrators from the Centers and Disciplines. The program will also develop Agency training materials and job aids and make change management representatives available to provide guidance and assistance to the Centers and Disciplines in a consultative role. To facilitate the sharing of best practice information across the Agency, the Change Management Team will act as a central repository for training feedback and lessons learned.

Ensuring that learners, supervisors and administrators possess the essential skills required to successfully implement SATERN is the responsibility of the Centers and Disciplines. They are responsible for developing Center-specific and Discipline-specific plans for delivering SATERN training. Centers and Disciplines will need to assess training needs, identify lead administrators to attend Agency provided training, and tailor and deliver training for learners and administrators. Representatives of the Centers and Disciplines are also responsible for creating a master schedule of training events and activities, coordinating enrollment and logistics, and evaluating training.

PROGRAM SUPPORT FOR TRAINING

Given the changes to the current training processes, timely and quality training will be critical in supporting the acceptance and usage of the new learning management system. The goal of this SATERN Training Guide is to provide an overview of the approach and methodology to be used in training personnel so that Centers and Disciplines can customize their own training plans accordingly. This section outlines the recommended approach to training for SATERN as well as the available resources and materials.

PROGRAM TRAINING APPROACH

The training approach for SATERN combines the use of self-paced web-based training (WBT) with instructor-led training in a computer lab setting as well as information sessions in small and large venues. The method of delivery varies depending on the audience. Access to the SATERN training environment is available through a web interface that supports administrator and learner roles.

For Phase II, training will be developed to support all roles within the SATERN system. Training for Level 1 Administrators is extensive, while training for Learners will consist of a single session of only a few hours. To support the effort required to train all Learners across the Centers, a web-based course is being developed.

SATERN is an Agency-level system that will require the use of standard business processes in order to ensure consistency across NASA. To facilitate the change to SATERN, process changes and terminology at the Center level should be identified and incorporated into the training. The SATERN *Business Process Guidebook for Administrators* outlines the Agency processes and policies for SATERN. It is available as a reference and is a helpful supplement to the training materials. It is also recommended that during all classroom sessions, a functional subject matter expert be present to address any questions related to training policies and procedures, in addition to a technical expert familiar with the software.

Training on SATERN requires NASA Centers and Discipline Owners to identify and select a number of personnel to be trained to fill various functions. These functions and capabilities are granted to users based on their user role which is made up of workflows and domain restrictions assigned to them. In addition to Learners and Supervisors, Centers will have to train administrators in the following roles: Training Office Administrators, Organization Training Coordinators, Facilities Managers, and Reporters. Discipline Owners will coordinate training for assigned Discipline Domain Reporters.

Figure 1, below, outlines the training audiences for SATERN, the preferred delivery method, and the party responsible for delivering the training.

Role	Preferred Delivery Method	Responsible Party
Level 1: Regional Administrators	Instructor Led / Hands On Classroom	Agency
Level 8: Discipline Domain Administrators	Instructor Led / Hands On Classroom	Agency
Level 9: Discipline Domain Reporters	WebEx with Job aid	Discipline
Level 3: Training Office Administrators	Instructor Led / Hands On Classroom	Center
Level 4: Organization Training Coordinators	Instructor Led / Hands On Classroom	Center
Level 5: Facilities Managers	Instructor Led / Hands On Classroom	Center
Level 10: Reporters	Instructor Led / Hands On Classroom	Center
Supervisors	Instructor Led Chat Sessions WBT	Center
Learners	Instructor Led Demonstrations, Open Houses, WBT	Center

Figure 1: SATERN Training Overview

Many resources will be provided to support planning for and delivering SATERN training at the Center and Discipline levels. These resources are designed to support SATERN training in the areas of training courses, training delivery, and post-implementation support. The following sections discuss each of these resources in more detail.

SATERN Administrator Training Curriculum

Training for SATERN administrators has been designed to be delivered primarily as instructor-led courses in a computer lab setting by either functional experts from the Center or Discipline, members of the Center's Training Office, or contractors hired specifically to perform training.

Figure 2 outlines the SATERN training curriculum by role and is followed by a brief description of each module. Modules to be trained by role relate to the permissions outlined in the SATERN Solutions Design Document (SDD). Suggested timing for the modules is noted in the table. These timings are listed only as a guide with the understanding that Centers and Disciplines may vary both modules and timing, depending on their particular training requirements. The training consist of lecture and participant exercises including clear examples of typical tasks and instructions for performing specific tasks "hands on" in the computer lab.

ROLE	MODULE	CLASS HOURS
Level 1: Regional Administrator	Introduction to SATERN	1
	Learning Needs Management	12
	Scheduling	8
	Multi-Level Approvals	2
	Managing Access	4
	External Training Request	1
	Reporting	2
	TOTAL	**30**
Level 8: Discipline Domain Administrator	Introduction to SATERN	1
	Learning Needs Management	12
	Scheduling Management	8
	Online Content Management	2
	Reporting	2
	TOTAL	**25**
Discipline Domain Reporters	Introduction to SATERN	1
	Reporting	2
	TOTAL	**3**
Level 3: Training Office Administrator	Introduction to SATERN	1
	Learning Needs Management	12
	Scheduling Management	8
	Multi-Level Approvals	2
	External Training Request	1
	Reporting	2
	TOTAL	**26**
Level 4: Organization Training Coordinator	Introduction to SATERN	1
	Multi-Level Approvals	2
	External Training Request	1
	Reporting	2
	TOTAL	**6**
Level 5: Facilities Manager	Introduction to SATERN	1
	Learning Needs Management	12
	Scheduling Management	8
	Reporting	2
	TOTAL	**23**
Level 10: Reporter	Introduction to SATERN	1
	Reporting	2
	TOTAL	**3**

Figure 2: SATERN Administrator Training Curriculum

Following is a brief description of each SATERN Administrator training module. For more detailed information and access to SATERN training materials, please visit https://solar.msfc.nasa.gov and select the e-training initiative information page.

INTRODUCTION TO SATERN
This module is designed to provide an introduction to SATERN terminology, concepts, navigation and conducting searches.

LEARNING NEEDS MANAGEMENT
Through lecture, activities, and hands-on computer lab work, this module teaches participants the concepts and terminology associated SATERN Learning Needs Management Model. Participants will develop a working knowledge of this model for use in implementation of their learning needs management strategy. Participants will gain basic, hands-on experience using the system functions in order to create and modify Items and Curriculum.

SCHEDULING MANAGEMENT
This module teaches participants the concepts and terminology associated with scheduling Instructor-Led Items in SATERN through lecture, activities, and hands-on computer lab work. Participants will gain basic, hands-on experience using system functions contained within SATERN in order to schedule Items and assign Resources.

ONLINE CONTENT MANAGEMENT
This module is designed for those administrators who have the responsibility of creating and maintaining Items within SATERN that link training materials created for online access.

MULTI-LEVEL APPROVALS
Through lecture, activities and hands-on computer lab work, this module teaches participants the concepts and terminology associated with the Multi-level Approval functionality.

MANAGING ACCESS
This module teaches participants the concepts and terminology associated with Security Management in SATERN through lecture, activities, and hands-on computer lab work. Participants will gain basic, hands-on experience using the system functions in order to create and modify the Security structure.

EXTERNAL TRAINING REQUEST
This module provides users with knowledge of the External Training Approval process. With explanation, illustration, and procedures it will teach users how to submit requests for external training, approve and deny external training requests.

REPORTING
This module provides users knowledge of the SATERN reporting tool. With explanation, illustration, and procedures, users will learn how to generate and configure reports in SATERN, including the use of standard reports, saving report criteria and scheduling reports to run on a recurring basis.

SATERN Administrator Training Materials

Training materials are available to support the delivery of each of the administrative modules. Materials include a **Classroom Guide** and **Presentation Slides**. The Classroom Guide is for participants and includes lessons, lesson checks, and activities. It is used in conjunction with the Presentation Slides which includes instructor notes to support individuals tapped to deliver SATERN training at the Center or Discipline level. The administrator participant activities are designed in such a way that it is not necessary to pre-populate the training environment with exercise data. Each exercise builds upon the previous one and the learner creates items and records to be used in subsequent activities.

For administrator end-users of SATERN, the need for information and learning does not end once they have left the classroom or completed the training course. To provide ongoing support, **job aids** are available that summarize key information or concepts that the users can easily reference. These job aids reflect the most important aspects of system usage and those tasks that are not undertaken on a daily basis. Although end-users will have the training manuals that will have been provided in training, experience has taught us that they will not be heavily referenced, and that end-users prefer a quicker way to obtain information. In addition, periodic conference calls and web-ex sessions sponsored by the program office will be held on topics of interest to SATERN administrators. SATERN administrator training materials can be found on the website at https://solar.msfc.nasa.gov. Select the e-training initiative information page.

SATERN Training for Learner and Supervisors

Critical to the success of the SATERN implementation is effective end-user training. Given the size of the Learner population at NASA, Training on SATERN for Learners and Supervisors is designed to allow for maximum flexibility in delivery. The preferred method of delivery depends on the audience and Center resources. For learners, presentations and demonstrations in auditorium or open house venues give Centers the ability to introduce SATERN functionality to many learners at the same time. Supervisor training is designed for smaller sessions which allow for questions and discussion. Web-based training offers the advantage of "anytime, anywhere" convenience in combination with the ability to progress at one's own pace. Figure 3, below, summarizes the training options.

Audience	Content	Delivery Method	Hours
Learners	SATERN Learning Overview	WBT	3
	SATERN Overview for Learners	Instructor-Led	1
Supervisors	SATERN Learning Overview	WBT	3
	SATERN for Supervisors	Instructor-Led	2

Figure 3: SATERN Learner and Supervisor Training

Following is a brief description of each SATERN Learner and Supervisor training option.

SATERN LEARNING OVERVIEW
The SATERN Learning Overview is a self-paced web-based training course which provides Learners with knowledge of the Learner interface and navigation of SATERN Learning. It will teach Learners and Supervisors how to perform standard tasks through illustration, interaction, simulation and downloadable job aids. It is designed to achieve the same objectives as the instructor-led training for Learners. This course can be used as refresher training, an on-going training solution for new employees or as pre-requisite training for SATERN administrators.

SATERN OVERVIEW FOR LEARNERS
SATERN Overview for Learners is a slide presentation which provides Learners with knowledge of the Learner interface and navigation of SATERN Learning. This module is not "hands-on" training. It is designed to be presented in an auditorium setting and can be accompanied with a demonstration of the SATERN software.

SATERN FOR SUPERVISORS
This module provides an introduction to SATERN functionality available to supervisors. It is a slide presentation which provides Supervisors with knowledge of how to enroll subordinates, approve enrollments, assign items and run reports. It designed to be used in a classroom or meeting setting that allows for demonstration and discussion. It can be used in conjunction with the SATERN Overview for Learners, or Supervisors can take the SATERN Learning Overview web-based training, prior to attending this session.

SATERN Learner and Supervisor Training Materials

A number of additional materials are available to support supervisor and learner training for SATERN. **Job aids** will be available for both supervisors and learners and are an excellent supplement to formal training and can assist in improving user knowledge and reducing requests for information and assistance to the Help Desk and training office. The SATERN **Guide for Supervisors** is a helpful reference guide that outlines in a step-by-step manner the supervisor functionality presented in the SATERN for Supervisors course. Once these resources are developed, information regarding how to access them will be made available

Resources to Support Training Delivery

In addition to training materials the SATERN Training Database, ?Help on Satern, and the Help Desk are other resources to assist Centers and Disciplines in planning for and delivering SATERN training as well as after implementation.

SATERN Training Database

A critical component of training for SATERN involves the availability of training database -- a copy of the way the new learning management system will be configured. The SATERN training database allows end-users to gain practical, hands-on experience and practice during and after training, and is essential for Administrators to use during classroom-based activities. Center and Discipline representatives who have attended Agency training will have information on how to gain access and add users to the training database. The Training Database is an environment that can be used for demonstrations, and one-on-one training. It provides a "safe" place where supervisors and administrators can work on self-paced exercises or practice without affecting the production database.

?Help on SATERN

The Help feature on SATERN is a good resource to all users. This Plateau online help system contains useful information on every area of the learning system and is a good resource for users unsure of how to complete a task, or locate a feature. Both general help and context-specific help are available as well as access to Contents, Index, Search and the system glossary.

SATERN Help Desk

Help Desk capability is available to provide user assistance to learners, supervisors and administrators requiring support with the SATERN LMS. The SATERN Help Desk will serve as the focal point for technical and functional problem resolutions. Users can contact the Help Desk at 1-866-419-6297.

BUILDING A CENTER / DISCIPLINE TRAINING PLAN

Center and Disciplines are responsible for reviewing the Agency training approach and for developing a Center or Discipline level plan for training that helps SATERN Administrators gain the knowledge and skills needed to perform the activities associated with their role. The training plan will also need to include activities that encourage acceptance and usage of the SATERN learning management system by Learners and Supervisors.

There are a variety of activities and tasks that should be considered in planning for SATERN training. These tasks can be grouped into the following key areas:
- Define the Scope
- Identify Participants and Resources
- Decide on the Training Approach
- Create a Master Schedule
- Modify Training Materials
- Coordinate Marketing, Enrollment and Logistics
- Measure Results

Given the broad impact of SATERN on employees across all Centers, planning for SATERN training is essential. "Just-in-time" training is key to successfully preparing users for SATERN, so delivery of training for learners should be take place no more than two weeks prior to a user having access to the system. Administrators will require time to practice and get used to the new SATERN functionality. Therefore, SATERN Administrators should be introduced to the system and given access to the training environment as early as possible. Due to customizations, some Administrator functionality will not be available until final configuration and testing is complete, so Centers should plan for refresher training for Administrators on functionality not initially covered.

Though Centers may vary with regard to their particular requirements and schedule, one important element all Centers should consider when developing the Center training plan is ensuring that the plan is in alignment with the Center's rollout approach for self-registration. Communication and training for the change in the external training form to NF-1735 should also be planned for.

The **SATERN Training Planning Worksheet** (Appendix A) is a practical guide for planning training for SATERN. It outlines a number of questions in each of the key planning areas to assist Centers and Disciplines creating a comprehensive training plan and approach. It can also be used as a checklist to review existing plans for gaps or areas not addressed.

CRITICAL SUCCESS FACTORS

Launching a learning management system takes time, but the benefits to NASA and its employees will be well worth the effort. The following factors will enable success with regard to training for SATERN.

Allocation of sufficient training resources. Time needs to be allocated for the functional experts that will be serving as trainers. This time needs to cover the trainer's own learning activities, as well as time to be spent training others. Trainers' contribution to the overall success of the training implementation should be considered in measurement and compensation.

Appointment of a talented and accountable training representative to the Center SATERN implementation team. Training will be a continuing concern at all Centers before, during and after go-live. It is essential that each Center have a capable representative to maintain an understanding of the whole scope of SATERN related training.

Integration with other training activities underway. To avoid duplication of work efforts, it is imperative that the training outlined in this document is aligned with Agency-wide training initiatives that are related in nature such as the NSSC.

Timely planning for training. This document outlines information, activities and dependencies that need to be considered in planning for training. The development and implementation of a training plan for SATERN in a timely manner is crucial to achieving user readiness.

.

Feedback

Feedback from readers of this document is encouraged and should be directed to the following SATERN Program contacts: Sheila Fogle at sheila.h.fogle@nasa.gov, Dennis Conrad at dennis.c.conrad@nasa.gov or Yvette Robinson @ yvette.robinson-1@nasa.gov.

APPENDIX A: SATERN TRAINING PLANNING WORKSHEET

This worksheet is intended to serve as a generic guide for Centers and Disciplines in developing a training plan for SATERN. The answers to the questions in each section will help in creating a comprehensive plan and approach that addresses the unique training needs and timelines of the Center or Discipline. It can also be used as a checklist to review existing plans for gaps or areas not addressed.

Define the Scope

- Who will be impacted by the SATERN Phase II rollout? Who are the primary stakeholders?

- What is your Center's approach and timeline for the rollout of SATERN to include self-registration and the NF-1735?

- Based on your Center's rollout approach, when will training need to occur? Will the training be organization-wide or a phased approach isolated to particular groups?

- What do you anticipate the overall environment will look like when you begin training on SATERN? Will there be competing priorities or other Center efforts taking place? (e.g. launch)

- How might other Center efforts impact SATERN training?

- Identify key training influencers and how you might involve them.

- What barriers to learning might you encounter? How will you address them?

Identify Participants and Resources

- What employees will serve in an Administrator role in SATERN? How many employees are in each Administrator role?

- How many learners will need to be trained in SATERN? Where are they located (department)? How many learners are civil servants and how many are contractors?

- Are there any special scheduling or learning needs that should be considered?

- What training facilities exist that can be used for SATERN training?

- What is the room capacity, functional capability, (eg. Computers) availability, and lead time for reservations?

Decide on the Training Approach

- What training approach is recommended by the SATERN project team?

- What courses and training materials will be provided to the Center / Discipline? When will the materials be available?

- What additional support is available from the Agency? How will the Center / Discipline use that support?

- What training approach will the Center / Discipline use to successfully prepare administrators, learners and supervisors to use SATERN? *(Take into consideration audience sizes, instructor- led and WBT options and facility constraints)*

- Is the Center training approach aligned with the Center rollout approach?

- Who will conduct the SATERN training? Do they have functional expertise? What is the time commitment? What specific actions will you take to identify trainers to deliver SATERN training?

- Have the trainers attended SATERN training provided by the Agency?

- Will web-based-training (WBT) be used as a pre-requisite, alternative, reinforcement or refresher for instructor-led training?

  Do any barriers to training exist? What is the plan to address these barriers?

- What end-user support is required during and after implementation? (e.g. Help Desk, Job Aids, FAQs, Live Labs)   If not provided by the Agency what is the Center / Discipline plan to address this support need?

Create the Master Schedule

(Note: A master schedule is a capacity plan to deliver learning activities. It outlines where and when each leaning event will be held.)

- What is the master training schedule for your Center / Discipline that ensures that all audiences will be trained in time for implementation? Consider the following:
    o Curriculum of courses to be offered
    o Course duration and capacity
    o Size of each audience requiring classroom training
    o Availability of facilities and instructors
    o Timeline for training
    o Lead time for dependent tasks (e.g. course modifications)

Modify Training Materials

- Are any modifications required to training materials to address Center-specific or Discipline-specific requirements (e.g. processes, terminology)?

- What specific modifications are required? To which modules / materials?

- How many resources and how much time will be required to modify / customize materials?

- Who will do the modifications?

- When does the work on modifications need to start in order to have completed materials to meet the master training schedule?

Coordinate Enrollment, Marketing and Logistics

- Given the audiences you have estimated for classroom training, will your current enrollment and confirmation processes effectively support the SATERN effort or do they require revision?

- Who will be responsible for managing enrollment and participant confirmation for SATERN training courses?

- Given the audiences you have estimated for classroom training, do you have sufficient personnel to support enrollment and confirmation for SATERN? If not, what are some alternatives you might consider?

- What is the best way to communicate training schedules for your Center / Discipline? What are some alternative or innovative methods for marketing SATERN training?

- Who will be the contact at your Center / Discipline for managing training-related communications?

- Who will be responsible for ongoing management and coordination of the master training schedule?

- Who will be responsible for handling backup plans for facilitators and general trouble shooting for training-related problems?

- Who will be responsible for managing the facilities for SATERN training (either on- or off-site)?

- Who will copy and distribute training materials for instructors and students?

Measure Results

- Who will manage collecting, aggregating and analyzing training evaluations for SATERN training?

- What method will your Center use to gain feedback from auditorium and open house and live lab sessions?

- How will your Center share key issues identified through training evaluation feedback with all trainers and the Program?