

# SATERN

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

National Aeronautics and  
Space Administration



## SATERN for Supervisors

May 2012

## Session Objectives

- At the end of the session, participants will be able to:
  - Describe SATERN
  - Log into SATERN and view employee records
  - Enroll employees in a Scheduled Offering
  - Approve enrollments
  - Add a learning activity to a Learning Plan
  - Run reports for employees

# Course Agenda

## *Introduction*

- Module 1: SATERN Overview
- Module 2: Working with Employee Records
- Module 3: Managing Employee Plans
- Module 4: Setting Delegates
- Module 5: Running Employee Reports

## *Summary*

# **SATERN for Supervisors**

## *Module 1: SATERN Overview*

## What is SATERN?

SATERN - the *System for Administration Training and Educational Resources for NASA* - is NASA's Learning Management System that offers Web-based access to training information.

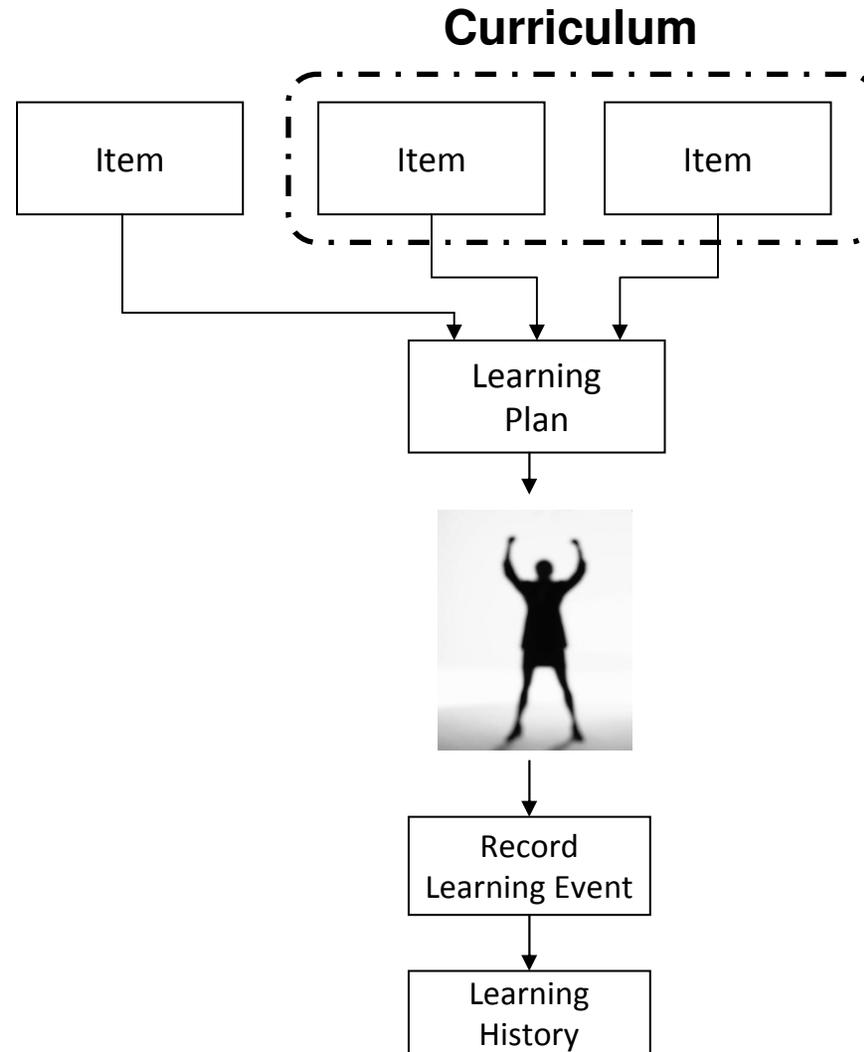
The screenshot displays the SATERN web interface for user James S Mitchell. The interface includes a header with the NASA logo, the SATERN title, and navigation tabs for 'Learner', 'My Employees', and 'Admin'. A 'Welcome James Mitchell | Sign Out' message is visible in the top right. Below the header, the user's name 'James S Mitchell' is displayed. The main content area is divided into two primary sections: 'Learning Plan' and 'Catalog'. The 'Learning Plan' section shows a list of training items categorized by due date: 'Overdue' (1 day overdue), 'Due within a month', 'Due later', and 'No due date'. The 'Catalog' section features 'Easy Links' for Approvals, External Requests, and Options and Settings, along with 'Curricula' and 'Learning History' widgets. The 'Curricula' widget shows 0 overdue, 1 due in 30 days, and 0 due later. The 'Learning History' widget shows 3 items completed in the last 30 days. The 'Competencies' widget shows no assigned competencies, and the 'IDPs' widget shows 0% complete, 0% in progress, and 100% behind.

## What does SATERN do for Supervisors?

SATERN provides Supervisors a “one-stop” approach to managing NASA training activities. Through SATERN employees are able to:

- Approve training requests
- Assign training
- View employee training reports
- Manage employees’ training requirements
- Approve Individual Development Plans (IDPs)

## Learning Needs Management Model





The top menu frame provides a link to Sign Out and tabs to access other functional areas in SATERN (e.g., Learner, My Employees, Admin), depending upon the Supervisor's permissions

# **SATERN for Supervisors**

## *Module 2: Working with Employee Records*

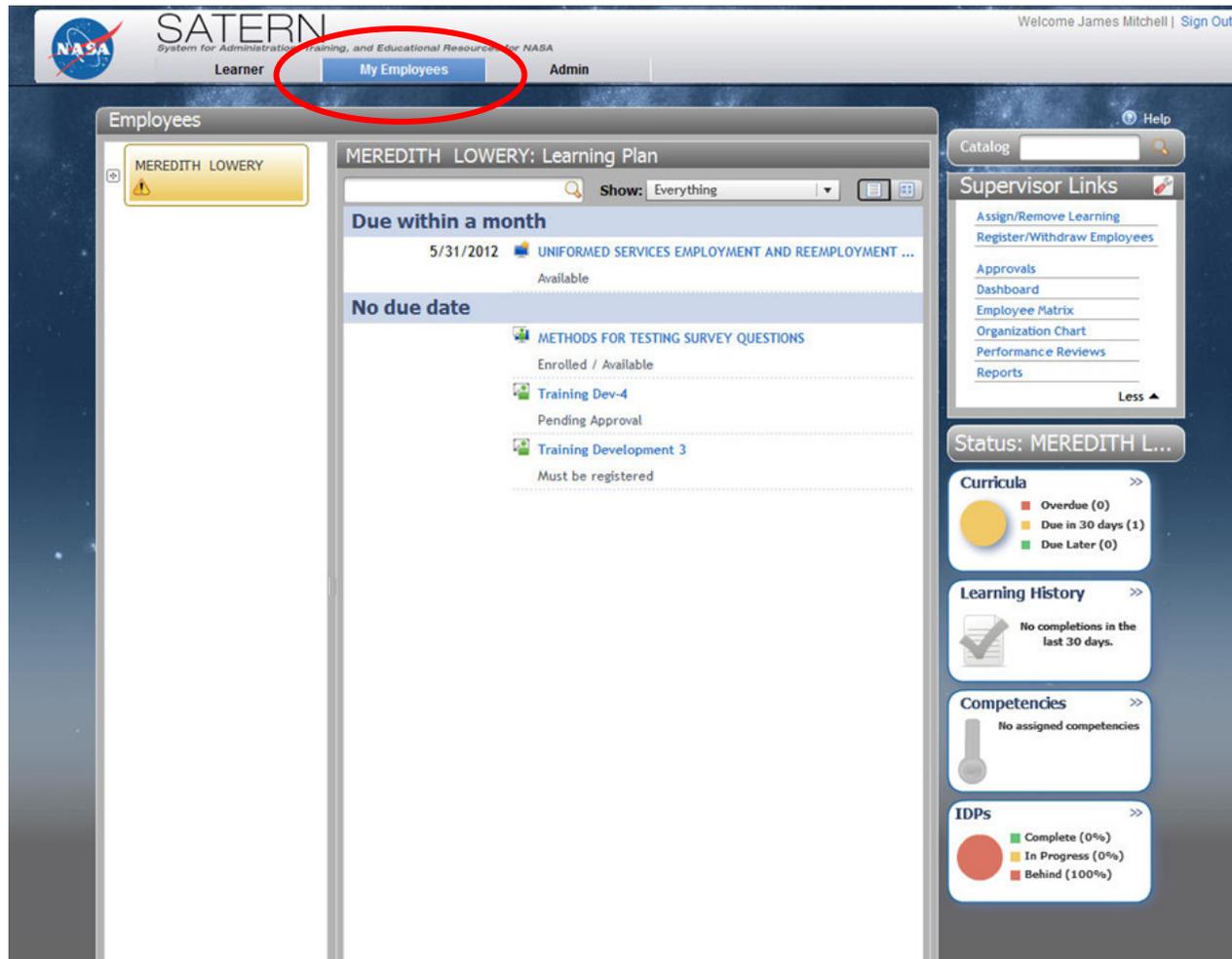
## Logging into SATERN

1. Launch Internet browser and go to <https://satern.nasa.gov>

## Need Help accessing SATERN?

1. Log into the SATERN Informational Web site at <https://saterninfo.nasa.gov>
2. Navigate to Resources > Guides and Aids
3. Click “How do I log into SATERN?” job aid for step by step instructions

Only Supervisors will see the **My Employees** menu option in the top menu bar:



## Functionality for Supervisors

- Supervisors have the ability to perform the following managerial duties in SATERN:
  - View employee records
  - Approve enrollments
  - Assign items (learning activities) to employees
  - Run reports

## Viewing Employee Records

- Supervisors can view records of employees:
  - Learning Plans
  - Curriculum Status
  - Registrations
  - Learning History
- A Supervisor selects the employee he/she wishes to view from the left hand pane to see a summary.

The screenshot displays the SATERN system interface for viewing an employee's records. On the left, a sidebar titled "Employees" shows a list of employee names, with "MEREDITH LOWERY" highlighted and circled in red. The main content area is titled "MEREDITH LOWERY: Learning Plan" and shows a search bar with "Show: Everything". Below this, the learning plan is categorized into "Due within a month" and "No due date".

**Due within a month:**

- 5/31/2012 UNIFORMED SERVICES EMPLOYMENT AND REEMPLOYMENT ... Available

**No due date:**

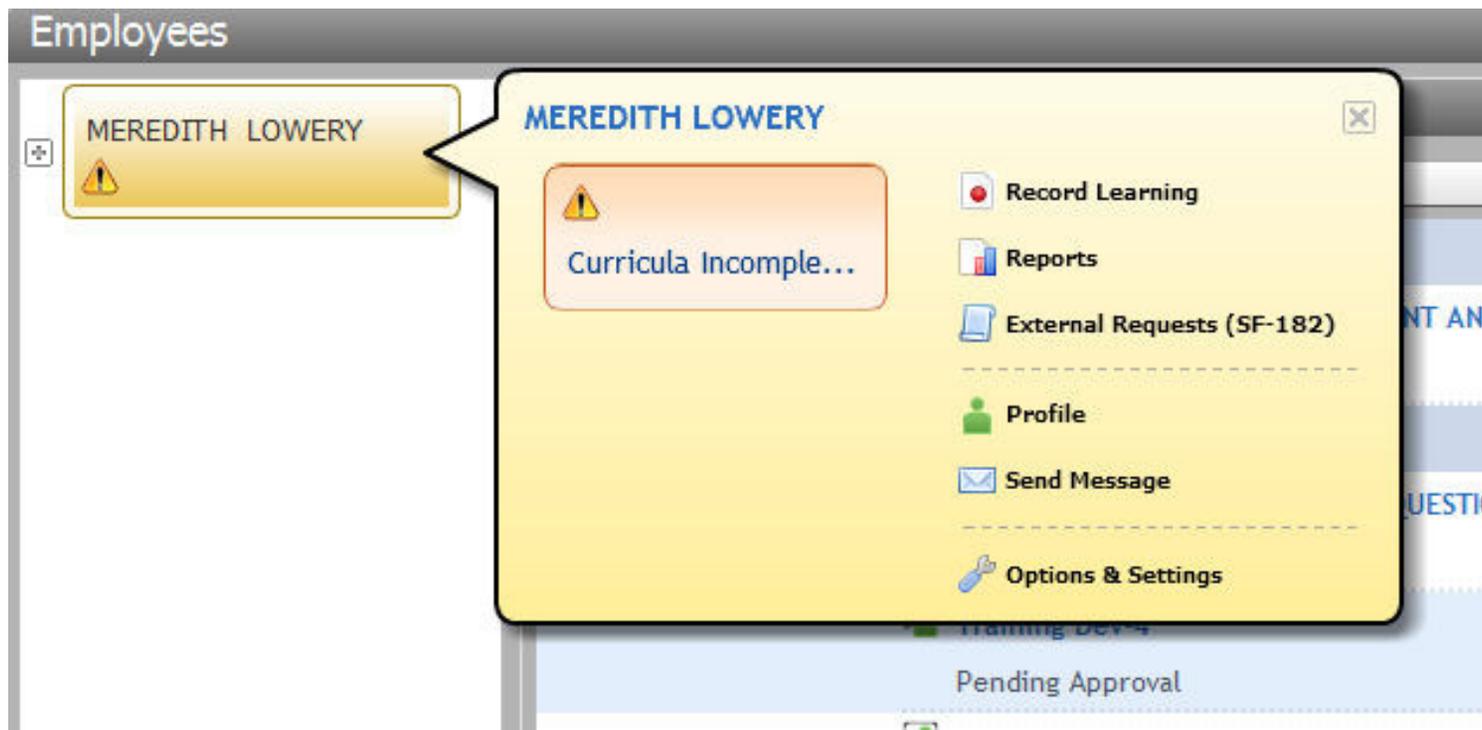
- METHODS FOR TESTING SURVEY QUESTIONS Enrolled / Available
- Training Dev-4 Pending Approval
- Training Development 3 Must be registered

The right sidebar contains several sections:

- Supervisor Links:** Assign/Remove Learning, Register/Withdraw Employees, Approvals, Dashboard, Employee Matrix, Organization Chart, Performance Reviews, Reports.
- Status: MEREDITH L...**
- Curricula:** Overdue (0), Due in 30 days (1), Due Later (0).
- Learning History:** No completions in the last 30 days.
- Competencies:** No assigned competencies.
- IDPs:** Complete (0%), In Progress (0%), Behind (100%).

## Viewing Employee Records

- A Supervisor selects an action by hovering his/her mouse over the employee's record and choosing one of the listed items:



# **SATERN for Supervisors**

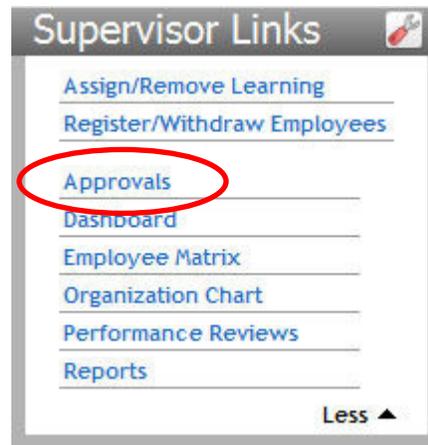
## *Module 3: Managing Employee Plans*

## Managing Employee Plans

- There are a number of functions that the Supervisor can perform in SATERN to help manage the training and development of their employees.
- These functions include:
  - Approving enrollments
  - Assigning and removing items from the Learning Plan
  - Running reports

## Approving Enrollments

- Supervisors will be responsible for approving enrollments in SATERN for their employees.
- Not all learning activities require Supervisor approval. This will vary by course.
- Supervisors will receive an e-mail notification when there is an approval that requires their review.
- To begin the approval process, click on the **Approvals** link from **Supervisor Links**:



## Approving Enrollments

- A Supervisor will see a list of pending approvals. Click the ► next to the employee's name to see additional details.
- The Supervisor removes the checkmark from the checkbox "Enter Reasons for Approvals or Denials," unless he/she wants to enter a reason and have it e-mailed to the Learner.
- Select **Approve**, **Deny**, or **Skip** for each submitted request. Click **Next** and then **Confirm** on the next screen

### Pending Reviews and Approvals

[Help](#)

This view shows you all of the review and approval actions you have been asked to perform. It is divided into two primary sections: reviews and approvals for performance management Activities, such as competency assessments (only if available); and approvals for training requests. You may switch between sections by clicking on the appropriate section header. Within each section you will find a list of specific reviews or approvals you are being asked to perform, categorized by action type.

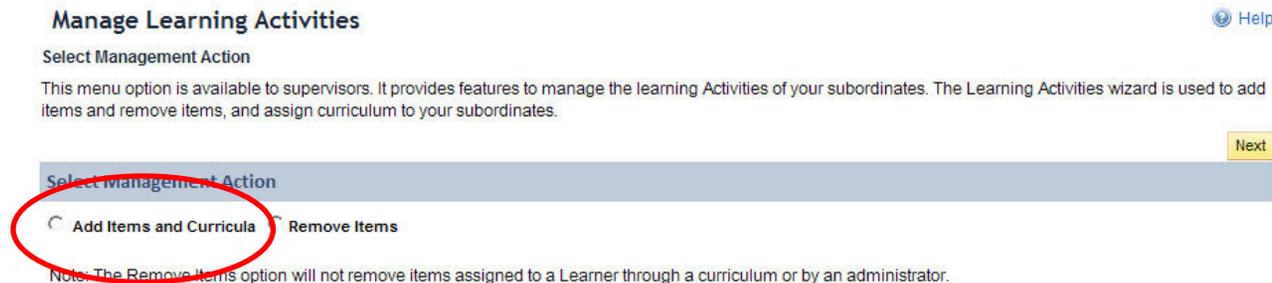
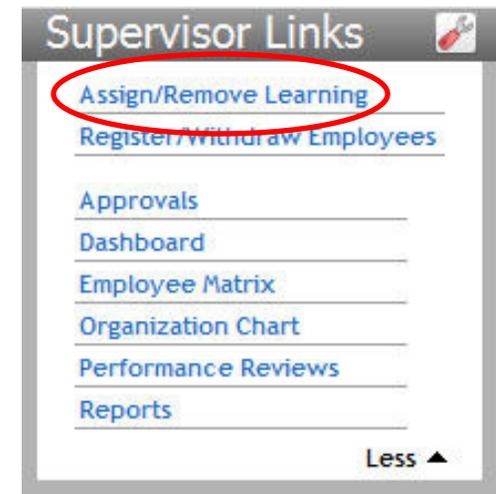
Performance Management (0)

Training (1)

Training								
Internal Training (1)								
<input checked="" type="checkbox"/>	Enter Reasons for Approvals or Denials						<input checked="" type="radio"/> All <input type="radio"/> Direct Reports Only	<a href="#">Next</a>
Organization ID	Learner ID	Learner Name ▲	Title	Request Date	Price	Type	Action [Approve All/Deny All]	
	C-mlowery	► LOWERY, MEREDITH	Training Dev-4	5/3/2012		ENROLLMENT	<input type="radio"/> Approve <input type="radio"/> Deny <input checked="" type="radio"/> Skip	

## Adding or Removing Items

- Each employee's Learning Plan contains learning activities (Items) that have been assigned to them based on their learning needs.
- Supervisors have the ability to add or remove a learning activity from the Learning Plans of their employees.
- To access and manage employee Learning Plans in SATERN, click **Assign/Remove Learning** from Supervisor Links:



- Select the appropriate management action by clicking **Add Items and Curricula**. Then click **Next**.

## Adding Items

- On the list of your employees, choose Learners:
  - Click the **Select Learner** checkbox next to each employee to whom an item should be assigned
  - Click **Add Checked**
  - Click **Next** button

### Manage Learning Activities

[Help](#)

Select Management Action → Select Learners

Select Learners		
Learner Name	Select Learner	Include Subordinates
▼ LOWERY, MEREDITH	<input type="checkbox"/>	<input type="checkbox"/>
▶ HOWER, SHARI A	<input type="checkbox"/>	<input type="checkbox"/>

[Select All / Deselect All](#)

[Previous](#) [Next](#)[Add Checked](#)

## Adding Items

- Enter a keyword on the search screen for items to add to the Learning Plan and click **Search:**

### Manage Learning Activities

[Help](#)

Select Management Action → Select Learners → Search for Items and Curriculum

Previous

#### Search for Items and Curriculum

Enter keywords to select items

Keywords:   Exact Phrase

Curricula  Instructor-Led  Online  Blended  Other (Select one or more)

Search

There are no items and/or curricula selected.

## Adding Items

- SATERN will display the title and description of the Item and display the matches.
- Check the **Add** box for each item to be added to the plan.
- Click **Add Checked** button:

The screenshot displays the SATERN Search Results interface. At the top right, there is a 'Help' button. Below it, a 'Refine Search' section shows 'Keywords: Training Development' and 'Exact Phrase: Yes'. A table of search results is shown with columns for 'Title', 'Type', and 'Add'. The 'Add' column contains checkboxes for each item. A red circle highlights the 'Add Checked' button at the top right of the table, and another red circle highlights the checkboxes in the 'Add' column. Below the table, there is a 'Select All / Deselect All' link and another 'Add Checked' button.

Title	Type	Add
Training Development		<input type="checkbox"/>
Training Development 3		<input type="checkbox"/>
Training Development-2		<input type="checkbox"/>

## Adding Items

- The **Assign Date** defaults to the current date. Click the calendar icon to change.

Edit Information					
Title	Type	Assignment Type	Assign Date	Remove	
Training Development		<input type="text"/> <a href="#">Select</a>	5/3/2012	<input type="checkbox"/>	

- Supervisors can also change the **Assignment Type** by clicking on the **Select** link then the Search button.

**Assignment Types** [Help](#)

[Refine Search](#)

**View Assignment Types Results**

ID	Description	
MANDATORY	Federally Mandated	<a href="#">Select</a>
OPTIONAL	Optional	<a href="#">Select</a>
RECOMMENDED	Highly Recommended	<a href="#">Select</a>
REQUIRED	Required	<a href="#">Select</a>

- Select** the type MANDATORY, OPTIONAL, RECOMMENDED, or REQUIRED, as appropriate to the assignment.

## Removing Items

- The process for removing items from the Learning Plan is the same as for adding Items. Begin by clicking **Remove Items**.
- It may be helpful to view the employee Learning Plan first to determine which Items should be removed, before using this functionality.
- Once an Item has been removed, the Supervisor will receive a message confirming the removal.

### Success

#### Status:

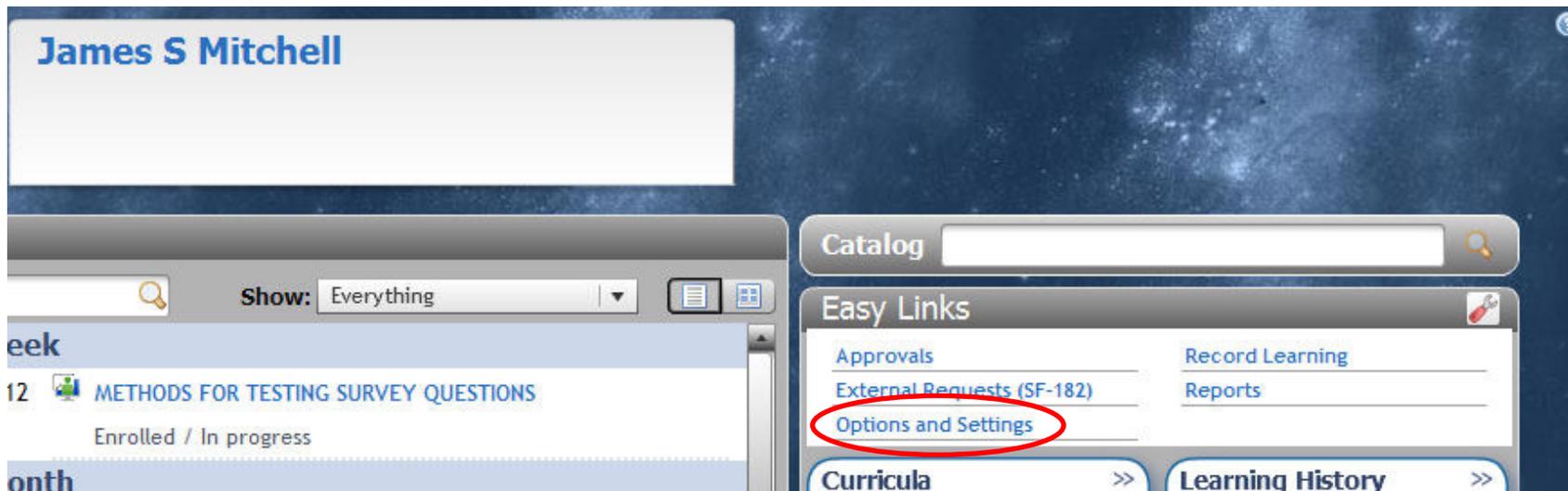
- Successfully removed the items from the specified Learners if the items are free floating items and have not been completed.

# **SATERN for Supervisors**

## *Module 4: Setting Delegates*

## Delegating

- Supervisors are able to delegate their SATERN responsibilities to another employee.
- From the Supervisor's own **Learner** tab, click **Options and Settings** from the Easy Links section:



- In the **Delegates** section, click **Add** and search for the employee to set as delegate

## Permission Options

- To grant the delegate the same level of permissions as the Supervisor, choose the **Predefined Permissions** radio button.
- Choose the **Selected Permissions** radio button and select the permissions to be delegated from the list.
- Choose the **Inactive Delegate** radio button to disable permissions, but retain Selected Permissions settings for future use.

**Add Delegate**

Select a Learner by entering the name below.

Enter delegate name

Advanced Search

Delegate:

- Inactive Delegate
- Predefined Permissions
- Selected Permissions

Permission to

Action My Subordinates

- Performance Reviews for Direct Reports
- Employee Work Space & Org Chart
- Competency Assessments for Direct Reports
- Deadline Dashboard for Direct Reports
- Learning Plans for Direct Reports
- Employee Matrix
- ITPs for Direct Reports

Action My Records

Save Cancel

# **SATERN for Supervisors**

## *Module 5: Running Employee Reports*

## Running Employee Reports

- Supervisors have the option of running reports that include data about their employees.
- SATERN allows Supervisors to generate a number of different standard reports including:
  - Learning Plan
  - Learning History
  - Item request
- All reports have the same options to describe how Supervisors want to run the report.
- To run a report, select **Reports** from **Supervisor Links**.

## Running Employee Reports

- After a report has been selected, a Supervisor will have a choice of running a report for himself/herself only, his/her employees, all in his/her chain of command, or all:

Reports [Help](#)

[Back to Browse Reports](#)

Run Learning Needs Group By Employee Type

Learner:  Self  Direct Subordinates  All Subordinates  All

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Mask Learner IDs

Page Break Between Records

Required Date From:

Required Date To:

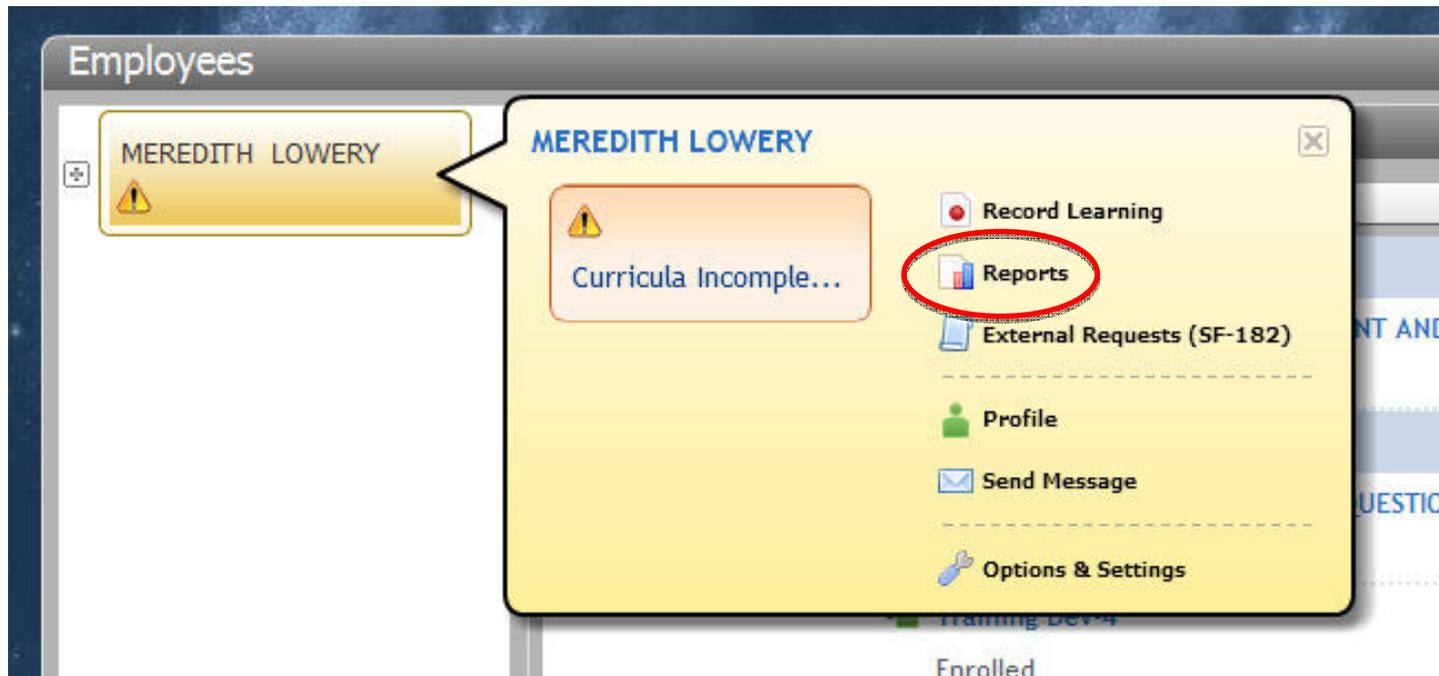
Item Criticality Selection Options:  Needs  Requirements

Sort By(not for group by Item):

- Supervisors also have a number of choices regarding Report display options.

## Running a Report for One Employee

- If a Supervisor needs to run a report for only one employee
  - From the My Employees home page, he/she hovers his/her mouse over the employee name and clicks **Reports** on the summary card:



# SATERN for Supervisors

## *Summary*

## Summary

- NASA's SATERN Learning Management System provides a real-time tool to help Supervisors manage employee learning and development
- SATERN is available 24/7 and is accessible via the web
- Support for SATERN is available via the NSSC Contact Center, ?Help in SATERN, and through the Center Training Office
- A Web-based tutorial on SATERN functionality is available at <https://saterninfo.nasa.gov>