

**System for Administration, Training and
Education Resources for NASA (SATERN)**

**Business Rules Sub-Team
Report and Recommendations**

November 10, 2009



National Aeronautics and Space Administration

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1. Introduction

1.1 Purpose

The purpose of this document is to outline the Business Rules Sub-team's recommendations in response to their charter. The intent is to outline the steps taken to develop the approach and recommendations.

1.2 Team Charter

A business rule is defined as guidance that there is an obligation concerning conduct, action, practice, or procedure within a particular activity. Business rules are used to govern activity outside the SATERN system and/or describe standard Agency practice when using SATERN. Rules are important because the NASA SATERN Administrative community is self-governing and ultimately, the efficiency and integrity of SATERN is the responsibility of Center and Discipline SATERN Administrators.

The Business Rules Sub-Team Charter was developed in March 2009 to document the goals of the sub-team, assumptions, roles, and membership. The charter was reviewed and approved by the Business Rules sub-team. A copy of the charter is outlined below.

Business Rules and Process Guide Sub-team Charter

Objective:

The objective of the Business Rules sub-team was to develop a comprehensive list of business rules for SATERN Administrators that describe NASA's approach to Plateau 5.8 functionality. These rules will provide guidance through a NASA-specific statement of usage in situations where configuration decisions impact Agency behaviors and requirements. Additional goals of this team were to:

- 1) Collect recommended business rules from the other SATERN Upgrade sub-teams (IDP, Evaluation, External Training, and Reports)
- 2) Provide suggestions regarding training and communications needs for roll-out

Assumptions:

- The Agency *SATERN Rules and Process Guide for Administrators* was the foundation for this sub-team, and was the basis for Upgrade recommended revisions and updates resulting from the decisions reached.
- Until viewing the Plateau version 5.8 SP5, assumed all current business rules were still valid.
- Any updates between the 1.6 version of the *Guide* and the sub-team's version would be added (e.g., recent OWG approvals).

Deliverables:

- A document outlining a list of recommended business rules for Plateau 5.8 functionality for the SATERN LMS. These recommendations will be presented to SATERN Governance for review and approval.

1.3 Members

In January 2009, Center and Discipline SATERN Upgrade Leads were contacted and asked to provide volunteers to participate in the five different sub-teams. The individuals who volunteered to be Business Rules sub-team members brought a wealth of knowledge about the current business rules processes in SATERN. Sub-team members invested many hours to understand the new functionality available in Plateau version 5.8 SP5, and to develop the recommendations submitted for consideration in this report.

Following are the members of the Business Rules Sub-Team:

ARC	Tobias Garcia	MSFC	Georgann Crump
GRC	Dennis Conrad	NSSC	Steven Bliss
GSFC	Nancy Stewart	NSSC	Cassandra Clark
HQ	Jennifer Myers	NSSC	Vessie Means
JSC	Monica Olson	SMA	Ellen Blahut
KSC	Robert Hubbard	Plateau	Lane Davis-Coury
KSC	Jennifer Sizemore		

2. Approach

To accomplish the tasks outlined in the charter, the sub-team met weekly via teleconference and the meetings were recorded. Additional training sessions were scheduled as required, and included the use of WebEx to demonstrate SATERN. Work was completed between meetings by members of the team, and presented to all sub-team members at the next meeting.

In addition, all team members had access to v5.8 SP5 Plateau sandbox. Representatives from Plateau participated in team meetings providing knowledge of Plateau software, and demonstrated options through WebEx during team meetings.

The HCIE portal was used to share documents and materials. Given the amount of information that needed to be reviewed, team members were assigned to be the leads for each section of the *Business Rules and Process Guide*. The leads reviewed their assigned sections of the *Business Rules and Process Guide*, utilized the sandbox to increase understanding of the new features, and presented recommendations to the team at the scheduled meetings. During the meetings, the team members discussed the recommendations and had the opportunity to offer additional suggestions. The team used a consensus method of decision-making. The resulting recommendations are detailed in the next section.

3. Recommendations

This section provides recommendations to address the charter tasks, as well as other issues uncovered during team meetings. Each of the recommendations is outlined individually. Each section identifies page references for both the current *Rules and Process Guide for Administrators* (“Guide”) as well as the accompanying Addendum to this report.

3.1 Introduction (pp. 6- 8 Guide, pp. 3-6 Addendum)

The Introduction provides an overview for administrators, a brief history of SATERN implementation, and information on how to use the Business Rules and Process Guide.

Recommendation: Make minor edits to the Introduction to make it current, accurate, and consistent, such as changing the version number and date; deleting references to prior Phases, SOLAR, NORs, AdminSTAR and the Bush administration; and making the tense consistent.

3.2 Global (pp. 9-13 Guide, pp. 7-12 Addendum)

External Course Coding (pp. 10-13 Guide, pp. 9-10 Addendum)

This entire section will need to be deleted, due to the new external training/SF-182 process that no longer codes external courses.

3.3 Learner/User Management (pp. 13-24 Guide, pp. 13-25 Addendum)

Learner/User Management refers to recording and managing information that pertains to Users, such as profiles and User history.

Recommendation: Change header and references throughout document to “User Management” to reflect the new Plateau 5.8 terminology

Other Center Training (p. 13 Guide, p. 13 Addendum)

This section outlines a specific process that Administrators must follow to allow Users to self-register for courses held at Centers other than the User’s Home Center.

Background: Under the current set up, when creating Scheduled Offerings with the Four-Step Supervisor / Training Coordinator / Training Office / Center-Specific Host Center Training Office (HCTO) Approval Process, there is no requirement to assign a domain restriction to the HCTO approval step. As a result, some training approval requests using this approval process were not routed correctly, usually defaulting to the HCTO of the User submitting the request, instead of the HCTO that is actually hosting the event.

Recommendation: Edit Business Rule for Four-Step Supervisor / Training Coordinator / Training Office / Host Center Training Office Approval Process (on p. 15 Addendum) to include appropriate verbiage.

Contractor Process (p. 15 Guide, pp. 15-21 Addendum)

This section outlines management of Contractor enrollment for Scheduled Offerings.

Background: There is no guidance in the Sub-Section “Account for Pending Civil Servants” (p.16), which instructs how to proceed when a civil servant registers and is approved for enrollment to an event which is full, but one or more of the enrollees are contractor employees.

Recommendation: Sub-Section “Account for Pending Civil Servants” (p. 16-17 Addendum) – add guidance for the scenario of removing a contractor employee enrolled in a Scheduled Offering that is full (i.e., no vacancies), because a Civil Servant has registered and has received appropriate approvals for the training. Additionally, update the accompanying flowchart (pp. 18-19 Addendum) in the document to reflect this step.

Background: The NASA Policy Directive 3410.2E was currently updated to 3410.2F.

Recommendation: Contractor Training Policy - “NASA Policy Directive 3410.2E Section 1.h” and related Business Rule (p. 20) – Edit the NASA Policy Directive to change the version to the current 3410.2F.

Background: Government Procurement regulations require that only a COTR may approve/deny a training request for a contractor employee.

Recommendation: Contractor Training Policy - “NASA Policy Directive 3410.2F Section 1.h” and related Business Rule (p. 20) – Recommend that SATERN EC determine a method to bring awareness of this requirement to the NASA COTR community, NASA contractor employees, and possibly include NASA supervisory personnel, to mitigate confusion and possible negative reaction from these entities.

Center-Unique Learner/User Domains (p. 22 Guide, p. 22 Addendum)

This section addresses the creation and management of Center-unique domains.

Background: The Operational Working Group is the incorrect level of SATERN governance for this step of the process, and should be handled by the SATERN Executive Committee (EC). Additionally, listing the active members of various SATERN teams (e.g., Dennis Conrad) could lead to confusion when team membership changes.

Recommendation: Edit content references, in the Agency Process sub-section to replace Operational Working Group/SATERN Governance and OWG members with the Executive Committee (EC). Also indicate that EC active member list can be found on SATERN Informational Website (<https://saterninfo.nasa.gov>).

Recommendation: Add wording to Reorganizations section to change weekly FPPS feed to daily and include IDMS.

Assignment Profiles (p. 22 Guide, pp. 22-24 Addendum)

This section addresses the use of Assignment Profiles, and policy regarding which Administrators can create Assignment Profiles.

Background: Only Administrators with the All or RA-1 role have the authorized workflow to create an assignment profile. In the current version of SATERN, catalogs are assigned via the Commerce function. In version 5.8 upgrade, the process for assigning catalogs will change and be pushed out via an assignment profile.

Recommendation: Access to view Catalogs is given through the Assignment Profile process, due to new 5.8.5 functionality. Only Administrators with the ALL or Level 1 (RA-1) have the workflows to create assignment profiles. Therefore, Center Level 1 administrators will be responsible for creating and propagating assignment profiles for their Center Catalogs. The NSSC will be responsible for creating and propagating the assignment profile for the NASA and Discipline catalogs. Naming convention for catalog assignment profiles should follow the guidelines under the Data Entry and Data Consistency section of the Business Rules and Process Guide. (e.g., NASA-CATALOG-ALL, GRC-CATALOG-CS)

3.4 Scheduling (pp. 25-28 Guide, pp. 26-32 Addendum)

Recommendation: Add wording to the introduction of this section to specify that the person responsible for these actions is the administrator who initiates the registrations (e.g., NSSC or Center/Discipline administrators).

Segments for Academic Courses (p. 25 Guide, pp. 26-28 Addendum)

Recommendation: Remove this section, including the Situation, Best Practice, and screenshots. Due to new 5.8.5 functionality, SATERN is no longer creating internal items for external activities.

Segment Offset (p. 27 Guide, p. 29 Addendum)

Recommendation: Remove the sentence after the rule about the importance of remembering to use a segment offset when scheduling an offering for an eight-hour day because it is redundant. The rule stands, with the minor change of adding text about the common selection of an hour for lunch.

Scheduled Offering for NASA Safety Training Center (NSTC) (pp. 27-28 Guide, pp. 31-32 Addendum)

Recommendation: Change wording in current business rules and add a new business rule to more accurately reflect the process between the NSTC and the Centers.

Recommendation: Delete Situation and Business Rule for “SATERN is able to check for conflicts...” because the rule does not apply to Center Administrators.

Recommendation: Change wording in the last business rule to specify that the rule applies to NSTC Administrators only.

3.5 Learning Management (pp. 29-32 Guide, pp. 33-39 Addendum)

Custom Column Data Entry (pp. 29-30 Guide, pp. 33-35 Addendum)

Recommendation: Make minor update to change the custom columns specified to column numbers 5, 6, 8, 9, 10, 14, 25. Insert the new screen capture (below) to show the custom fields.

The Custom Columns are shown below as they appear in the system:

Substitutes	Online Settings	Notifications	Materials	Objectives	Grading Options
Tasks	Curricula	Competencies	Custom Fields	Requests	Rqst Reasons
Summary	Design Data	Delivery Data	Instructors	Prerequisites	Documents

Edit the Custom Fields for the Item

Apply Changes Reset

Column Number	Label	Value
5	Type of Training Sub-Code	01-05 (Human Resources) ▾
6	Source of Training	03 (Non-government) ▾
8	Academic Credit Code	05 (N/A) ▾
9	Training Credit Type Code	03 (Continuing Education Unit) ▾
10	Direct Cost Code	D (Contract - Funded by Agency) ▾
14	Indirect Cost Code	A (Individual - Funded by Center) ▾
17	PO Number	<input type="text"/>
18	Category Code	<input type="text"/>
19	Sub Category Code	<input type="text"/>
20	Funding Organization	<input type="text"/>
21	POC	<input type="text"/>
22	Budget Line Item	<input type="text"/>
23	Metrics That Matter (MTM)	<input type="text"/> ▾
24	P/PM RE-CERTIFICATION	<input type="text"/> ▾
25	Training Vendor (ORG ID)	<input type="text"/> 🔍

Recommendation: Add a sentence to the situation description about filling in the mandatory custom column information to address the Metrics That Matter custom column, which does not exist at the scheduled offering level.

This section outlines NASA’s use of custom column data to capture NASA-specific information.

Recommendation: Delete the last bullet of the current rule about leaving free-form fields blank instead of entering a zero, because it has been verified with GP that it does not impact their processes at all.

Source ID Field (pp. 30 - 31 Guide, p. 35 Addendum) – **includes External Training**

Recommendation: Change references to NF-1735 to SF-182 to align with the standard form that comes with Plateau 5.8, SP 5. In addition, change the EXTERNAL section to cite the current process for reportable conferences.

[Agency-wide Courses \(pp. 30-31 Guide, p. 36 Addendum\)](#)

Recommendation: Add a situation and a business rule of External Equivalence for Agency-wide Courses:

Situation: SATERN allows Administrators to give credit for courses when an equivalent external course has been successfully completed.

Rule: Administrators must request approval for any desired equivalent course from the course owner. The Course Owner is typically the person listed in the Item Record Contact Email field and is the person whom Centers should contact to apply for equivalent status. (If the Points of Contact (PoCs) listed in the Contact Email field are not appropriate, they will know to whom in the Discipline leadership to take the request).

After verifying approval for an equivalent course, the appropriate Center or Discipline administrator will grant credit for the SATERN item via the Learning Event Recorder. The Administrator will use a Default Completion Status of “Substitute” and will complete the “Comments” field in “Step 5: Edit User Even Information” with the appropriate equivalent course information (i.e., course name, vendor, date, etc.).

[Substitutes for Agency-wide Courses \(p. 31 Guide, pp. 36-37 Addendum\)](#)

This section of the SATERN Business Rules and Process Guide deals with substitute relationships.

Recommendation: Add wording to the current rule that more clearly explains the process for establishing substitutes, especially when a discipline is involved.

Rule: Administrators must request approval for any desired substitutions from the course owner. The Course Owner is typically the person listed in the Item Record Contact Email field and is the person whom Centers should contact to apply for substitute status. (If the PoCs listed in the Contact Email field are not appropriate person, they will know whom in the Discipline leadership to take the request).

[Domain for Instructors \(p. 32 Guide, pp. 38-39 Addendum\)](#)

Recommendation: Change the situation description to reflect the current process and the out-of-the-box functionality provided in Plateau 5.8 SP 5:

Situation: Instructors are added to SATERN by the NSSC in the Public Domain. As a result, the instructors are available to every Center in SATERN. Instructions on how to create instructor follows:

Recommendation: To support this functionality and allow best use of out-of-the box functionality of this product, we recommend creating regions for each Center and Discipline (i.e., ARC, DRFC, GFSC, GRC, HQ, JSC, KSC, LaRC, ITS, SMA, etc.) NOTE: Not identifying a region or Center will not prevent an instructor from teaching at that Center, if desired later.

This is only used in assisting to identify particular instructors and allowing searches for all qualified instructors at each Center.

Recommendation: To further support this new functionality, we are recommending changing the existing business rule to remove the verbiage of placing them in the Center domain and instead address how the IDs will be named to identify them as instructors.

Rule: Create Instructor IDs using the naming convention of **I**-first initial, middle initial, last name to identify instructor IDs verses other IDs within SATERN.

Information required that should be included for instructors:

ID, full name, company (if contractor or vendor) domain, and organization (if civil service). Once the account is added, move to the **Authorized to Teach** tab and add all courses this instructor is authorized to teach. Now move to the **Regions** tab and add the regions for each Center where this instructor is expected to teach (e.g., home Center or Center of record should be selected as the primary to aid in identifying similarly named instructors from different locations)

NOTE: Before creating an Instructor Record, check and make sure that instructor does not already have an account in SATERN. If the account does already exist, you should modify the assigned regions to include the new region/Center location and provide the instructor record ID to the original add instructor requester.

3.6 Reports (pp. 32-37 Guide, pp. 40-45 Addendum)

Agency Process and Reporting Flow (p. 33 Guide, pp. 40-42 Addendum)

Recommendation: Delete references SOLAR, AdminSTAR, and Brio; add directions for the 1620 form to only be submitted by Center/Discipline SALs; and add the link to the 1620 form on the NSSC.

Pre-defined custom reports available in SATERN (p. 34-35 Guide p. 43 Addendum)

This information is no longer relevant.

Recommendation: Remove entire paragraph and table.

Working with Certificates (pp. 36-37 Guide, pp. 44-45 Addendum)

It was determined that this information does not belong in the *Rules and Process Guide* and would be better off as a Job Aid.

Recommendation: Delete this section from the Rules and Process Guide for Administrators. Transfer the entire section to a job aid, include in training material related to reports, or both.

3.7 System Administration (pp. 38-39 Guide, pp. 46-49 Addendum)

Recommendation: Change 10 unique Training Office Specialist Roles to 20 to reflect the current number.

Recommendation: For the Note at the bottom of p. 39 Guide (p. 48 Addendum), new roles can only be requested by the SAL

Granting Administrator Access (p. 40 Guide, pp. 48-49 Addendum)

Recommendation: Edit the existing Situation to add Discipline, update the text (e.g., limit of three Level 1 Administrators per Center), and delete the guidance for creating roles at the Centers and Disciplines.

Recommendation: Identify that SATERN Administrator Leads (SALs) are responsible for creating new administrator accounts for the Centers and Disciplines.

Granting Discipline Administrator Access (p. 40 Guide, p. 49 Addendum)

Recommendation: Change Discipline Owner to Discipline SAL.

3.8 Support (pp. 40-41 Guide, p. 45 Addendum)

Recommendation: Replace Dennis Conrad’s contact information as the person to contact for concerns for the Executive Committee (EC) with a generic message that does not include an individual. Also, change training “sandbox” to “environment.”

3.9 Acknowledgements (p. 42 Guide, p. 51 Addendum)

Recommendation: Update Acknowledgements to include all members of the SATERN Upgrade Business Rules sub-team.

3.10 Appendices

A. NASA FORM 1735 (NF-1735) (pp. 44-46 Guide, pp. 52-56 Addendum)

Appendix A contains screen shots for the current NF – 1735 form, which is being replaced by the SF-182 form being used by other Government Agencies. We need to update Appendix A to reflect the SF-182.

B. SATERN Mandatory Fields (pp. 47-59 Guide, pp. 57-69 Addendum)

This Appendix provides information about which fields in the SATERN Admin environment are required to be populated with data. Breakout is by entity or workflow (e.g., Item, Scheduled Offering, Learning Event Recorder).

Background: Confusion may arise from the instructions concerning Custom Column for “Indirect Cost Code”, since this field is only required for certain instances, and not others.

Recommendation: For Item and Scheduled Offering Mandatory Fields, Custom Columns (pp. 47 & 53, respectively), note that the “Indirect Cost Code” in the accompanying tables is not mandatory for internal training.

Background: The SATERN Upgrade Tech Team performed a data call with the Centers and Disciplines and determined changes to the custom columns based on alternatives for required eHRI data. These changes impact the SATERN mandatory fields detailed in Appendices B and C, which is detailed the following section C.

Recommendation: For Appendix B, make the following changes for Item and Scheduled Offering Mandatory Fields:

- Remove “On & Off Duty Hours,” “Purpose of Training,” “Type of Training,” “Special Interest Code,” “Per Participant Cost,” “Books and Material Cost,” “Other Direct Cost,” “Travel,” and “Per Diem”
- To “Type of Training Sub-Code,” specify that Internal Items are submitted at the Learning Item level, and should include prefix of Type of Training Code
- Add “Training Vendor”

C. Acceptable Codes for Custom Fields (pp. 60-70 Guide, pp. 70-87 Addendum)

This Appendix provides descriptions and definitions, acceptable codes, and guidelines for use of the Item and Scheduled Offering custom fields.

Recommendation: Retain this appendix and update as follows:

On-Duty Hours: *Remove* the On-Duty hours for all *internal* training events. The *Item* “Contact Hours” will represent the total training time for an employee. In the private history table (PHT), the Contact Hours will be recorded as *On-Duty* hours, and zero (0) will be recorded for Off-Duty hours for *only Internal* Training events.

Off-Duty Hours: *Remove* the Off-Duty hours for all *internal* training events. The *Item* “Contact Hours” will represent the total training time for an employee. In the private history table (PHT), the Contact Hours will be recorded as *On-Duty* hours, and zero (0) will be recorded for Off-Duty hours for *only Internal* Training events.

Purpose of Training: *Remove.* This field will be dropped from all custom columns for *internal items*. The value will be automatically assigned as 03 "Improve Present Performance" for the PHT and all reports.

Type of Training: *Remove.* This field will be dropped from all internal items. The value will be automatically calculated for the PHT and all reports, based on the sub-type value.

Type of Training Sub-code: For internal Items, the Admin will only have to submit the Training Sub-Type at the Learning Item Level. The Sub-type does not need to be changed on a scheduled offering or individual basis. Update all sub-codes to be prefixed with correct Type of Training Code.

Special Interest Code: This field will be dropped from all custom columns for *Internal Training* items and from the SF-182. For those Centers that still use this field/information, they can capture the field as part of the Center category/Sub-category codes.

Per Participant Cost: *Remove.* This field will now be captured using the Commerce function. New Cost Name Field will be “Per_Participant_Cost” and will include all direct cost tuition and fees. This field will only be tracked at the individual learning event level. It will be dropped from the Item and Scheduled Offering levels.

Books and Material Costs: *Remove.* This field will now be captured using the Commerce function. New Cost Name Field will be “Books_Material_Cost” and will include all books and material costs. This field will only be tracked at the individual learning event level. It will be dropped from the Item and Scheduled Offering levels.

Other Direct Costs: *Remove.* The proposal is that this field will be removed from the Custom Columns for Internal Items/Scheduled Offering and also removed from the SF-182. Any other direct costs should be captured as part of the Per Participant Costs in the Commerce function.

Travel: *Remove.* This field will now be captured using the Commerce function. New Cost Name Field will be Travel. This field will only be tracked at the individual learning event level. It will be dropped from the Item and Scheduled Offering levels.

Per Diem Cost: *Remove.* This field will now be captured using the Commerce function. New Cost Name Field will be Per_Diem. This field will only be tracked at the individual learning event level. It will be dropped from the Item and Scheduled Offering levels.

Sub-Category Code: Update definition from “Alpha-numeric code used to further sub-categorize Category Code further” to “Alpha-numeric code used to further sub-categorize Category Code”.

Funding Organization: Update definition from “Four digit numeric code used to identify which Directorate is funding a course” to “Alpha- numeric code used to identify which organization is funding a course”.

POC (Point of Contact): Update definition from “Up to four digit alpha code used to identify the Training Office personnel responsible for the administration of the course or training application” to “Alpha-numeric code used to identify the Training Office personnel responsible for the administration of the course or training application”

MTM: New data element. Added new definition and acceptable codes as follows: Acceptable Codes: “Y or N” and Definition: “Indicates whether Metrics that Matter was used for this Item.”

Training Vendor: *New field.* Instead of collecting the Vendor Information for a course for each employee as part of the "Learner Event Recorder" functionality, a custom column will be created

at the Item and Scheduled Offering level, and the Vendor will be recorded when these items are created.

D. Other Center Training (pp. 71-80 Guide)

Recommendation: Remove Appendix D and create a job aid for Other Center Training. These screen shots add no value to the *Rules and Process Guide*.

E. Contractor Process Screen Shots (pp. 81-92 Guide)

This appendix provides screen shots for registering learners and step by step instructions for assigning approval roles and domains to learners in SATERN.

Recommendation: Remove Appendix E from the SATERN Rules and Process Guide. Create a job aid for each screen shot once the new version of SATERN is released.

F. Glossary (pp. 93-94 Guide)

Background: The list of terms and their definitions/explanations is useful, and experience has shown that other terms and their definitions should be added.

This Appendix lists SATERN terminology and related definitions, to assist the Administrator in understanding workflows and processes.

Recommendation: Retain this appendix, and add the following terms and their definitions –

- **Administrator** – An individual that has an assigned role and responsibility in SATERN to manage system data
- **Assignment Profile** – Assignment profiles associate Curricula, Domains and Competency Profiles to Users based on the multiple attributes of the Users. It is similar to job positions, but it offers more criteria to filter Users. Users whose attributes (such as Domain, match those of the assignment profile are automatically assigned the curricula and the proficiency profiles associated with the respective Assignment Profile.
- **Basis Date** –A component of the Calendar-based Curriculum set-up, the basis date (defined for each curriculum) defines the beginning point of the time-periods.
- **Force Credit** – The default value when you add an item to the list of items granting substitute for the selected item is No. This means that substitute will only be granted to a User under this substitute relationship if the item that is currently being viewed in the Items section is actually included in the User's learning plan. If you opt to force credit, then a separate learning event is recorded in the User's learning history for the selected item when the item granting substitute is successfully completed
- **Force Incomplete** – When you enable the "Force Incomplete" option for a curriculum item, the system will calculate whether the status should be complete or incomplete based on the learner's latest attempt at completing the item. If the User's latest attempt is incomplete, the system will calculate the expiration and required dates based on the date/time of the last unsuccessful attempt. When a Curriculum contains more than one Item, and the Force Incomplete option is checked for

the Curriculum, then the Curriculum will remain Incomplete until ALL the included Items are successfully completed.

G. Training Materials and Job Aids on SATERN Info Web site (p. 95 Guide)

Recommendation: Remove Appendix G from the SATERN Rules and Process Guide, as the materials and job aids for each subject are available on the SATERN Info Web site (<https://saterninfo.nasa.gov/>), under Resources > Training Materials.

H. Learner Reference Code Values (pp. 96-141 Guide, pp. 88-89 Addendum)

This Appendix provides acceptable codes and descriptions for use of the Learner custom fields.

Recommendation: Retain this appendix and update with sources and Web links for reference, where applicable. In addition, delete the Company Name table due to frequent updates, and add the new data elements Occupational Series Code, COTR, and Company Org Code.

3.11 New Proposed Business Rules for 5.8

A. Business Rules Sub-team

Catalogs

Background: A catalog is used to make Items and Curricula that are not part of a Learning Plan viewable to users. Access to one or more catalogs is based on attributes in an assignment profile.

Issue: An Item or Curriculum may reside in more than one catalog. In order for a user to self assign an Item, Curriculum, or self-enroll in a Scheduled Offering of an Item, the Item or Curriculum must reside in a catalog to which the user has access.

Recommendation: The following business rule is recommended: Only Admins with the “All” role or “Regional Admin Level 1” role have the authorized workflow to create an assignment profile. Therefore, any catalog creations for the Disciplines, (e.g., IEM, ITS, SMA) must be created by an Admin at the NASA Shared Services Center (NSSC), who has the authorized workflow. Assignment Profiles for Center Catalogs will be created by an Admin at the Center who has the authorized workflow. The Assignment profile shall follow the naming convention listed in the Data Entry and Data Consistency section of the Business Rules Guide.

Record Learning Event Using Quick Links (p. 25 Addendum)

Background: During 5.8 User Acceptance Testing a new feature was tested for recording learning events through Quick Links. It was noted during the testing that when recording a learning event through Quick Links that the Custom Fields, Per Diem, Travel, Book_Material_Cost, and Per_Participant_Cost are not available to complete. These fields only show up if you use the Learning Event Recorder (Learner Management>Tools>Learning Event recorder).

Recommendation: Add new rule “The Record Learning Event feature through Quick Links shall never be used to record a learning event. All recorded learning events shall use the Learning Event Recorder (Learner Management>Tools>Learning Event recorder).”

B. IDP Sub-team Recommendations

Situation: During the March SATERN 5.8 Upgrade Configuration Workshop, the SATERN community began having discussions about limiting contractor’s access to the IDP functionality. In speaking with the Office of Human Capital Management, it was conveyed that the Agency does support contractors in being trained in skills that they are not required to bring to the job. However, the development of the contractor resides solely as the responsibility of the company that employs the contractor.

Understanding the Agency’s position on developing contractors, the IDP sub-teams recommendation is to limit the IDP functionality to NASA Civil Servants. Through speaking with the vendor, it is the understanding of the SATERN Upgrade Project Core Team and sub-team members, that system administrators can allow groups of users to access any combination of user menus and submenus by assigning a user Role with an Assignment Profile. In the current version, all users (learners) had the same set of menus. It is now possible to grant different communities of users’ different menu level access.

Recommendation: The team recommends the following be used as business rules to direct the management of IDP access:

- 1) The Agency regards the development of contractors as the sole responsibility of the company that employs them. As a result, the **Career** tab will be suppressed, eliminating the view of the IDP functionality and competency assignments.
- 2) In the SATERN Production environment, the NASA Shared Services Center will create an assignment profile that will target new auto-generated contractor accounts. The assignment profile will assign the contractor user role to the contractor account removing the ‘Career Tab’ from the User site.

C. Evaluation Sub-team Recommendations

Background: One of the tasks indicated in the Evaluation Sub-team charter was to identify and recommend business rules or guidance concerning conduct, actions and procedures within SATERN with regard to evaluations. These rules are needed when system functionality cannot enforce Agency-defined usage.

The SATERN Standard Agency Level 1 Evaluation for instructor led and online learning evaluates the users’ reaction to the training. It is a valid measurement tool that allows Centers to reliably gauge satisfaction, gain immediate feedback, and provide comparisons of courses/programs. Often only a Level 1 evaluation is necessary, depending on the type of training, level of investment, etc. The SATERN Level 3, follow-up evaluation, evaluates users’ behavior after the training and assesses application of knowledge. MTM uses a five-level measurement model, the Kirkpatrick/Phillips Model, which goes beyond the SATERN Level 1

and 3 evaluations. The five levels include satisfaction, learning effectiveness, job impact, business results, and return on investment.

Issue: There is a need for standard data collection, storage, and reporting processes for training within NASA, as well as the ability to analyze training data across NASA. It is important to efficiently and effectively collect training data in a practical, scalable and repeatable manner. Managing the evaluation process can be a highly administrative effort.

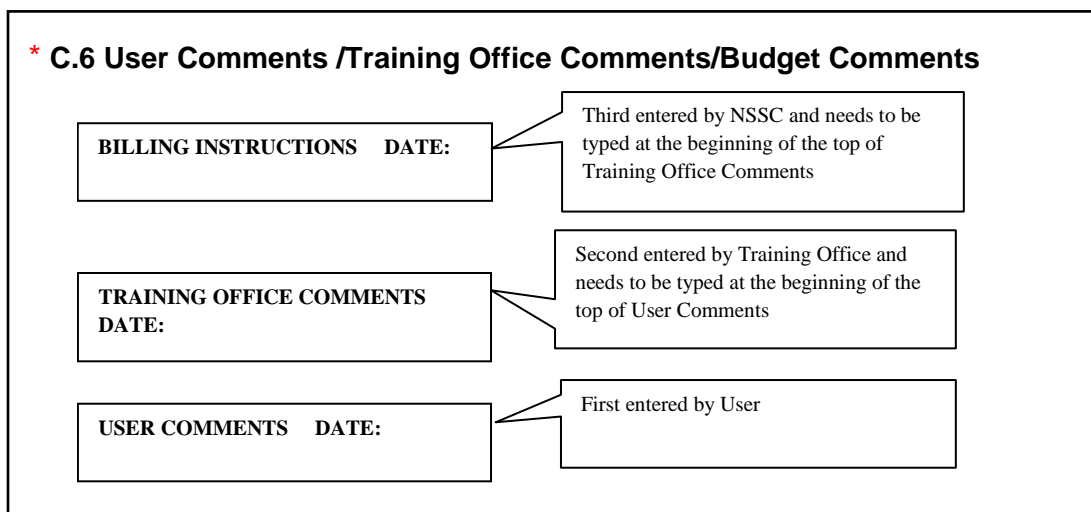
Recommendation: The following business rules are recommended:

- SATERN Administrators should use the SATERN Level 1 Agency standard evaluation for applicable internal training (instructor led and online learning). Administrators should not add, delete or modify questions in these standard evaluations.
- SATERN Administrators should not use the Level 3 evaluation functionality in SATERN. If Level 3 evaluation is required, SATERN Administrators should contact the Agency MTM Administrator.
- SATERN Administrators should not set a Level 1 survey as required for Item completion.

D. External Training Sub-team Recommendations

Recommendation: The sub-team recommends the following external training business rules:

- **Completing the Comments Box** - Users, SATERN Administrators, NSSC Approvers should place their comments in Box C6 *User Comments/Training Office/Comments/Billing Instructions* on the SF-182 form. The newest comments should be placed at the top of the comments box under a header prior to the next section. Headers should be all caps and dated as follows: **USER COMMENTS xx/xx/xxxx**
TRAINING OFFICE COMMENTS xx/xx/xxxx, **BILLING INSTRUCTIONS xx/xx/xxxx**.



- **Withdrawing a User** – When a SATERN Administrator withdraws a user’s SF-182 request there is not an automatic notification sent. The Administrator who withdraws the user’s request should send a note to the user, the supervisor and the training coordinator advising them of the action and the reason.

3.12 Training and Communications

Part of the charter tasked this team with providing suggestions regarding training and communication needs for implementation of version 5.8 functionality. The team discussed training and communication materials that would need to be developed or modified to go with the new functionality found in SATERN 5.8. The over-arching theme when communicating the updates should include enhanced capabilities and ease of use for the user.

Due to a few major changes in 5.8, the team highly recommends that specific training emphases be placed on explaining the deltas between versions 5.5 and 5.8 to include the following new or updated business rules:

- Catalog Assignment Profiles
- Domains for Instructors
- Scheduled Offering
 - Scheduled Offering Description Field
 - Calculating Per Participant Cost
- Admin Reroute Supervisory Approvals process
- Agency-wide Courses – Equivalent Training
- SATERN Mandatory Fields
- Evaluations
 - MTM Closeout process
- SF-182 process

It was recommended in section 3.10 that the current *Guide* appendices D, E, and G be converted into separate job aids. The team also suggests that the existing training material and job aids be modified to reflect current screen shots from version 5.8.

4. Summary

The Business Rules Sub-Team appreciates the opportunity to submit these recommendations, which include Agency, Center, and Discipline Administrators’ perspectives. Included for consideration are recommendations that provide for new and updated business rules, as well as other considerations required for implementation.

4.1 Next Steps

The Upgrade Center/Discipline Transition Representatives along with Center Leads (i.e., Full Team Representatives) are requested to submit the Feedback Form (one per Center or Discipline), indicating agreement or disagreement with these recommendations. The Feedback

form is located at the end of the document. With stakeholder approval of the proposed recommendations and approach, the plan for implementation of the recommendations can begin.

SATERN Upgrade Business Rules Sub-Team Report and Recommendations
Feedback Form

Organization: _____

Submitted by: _____

Do you endorse the recommendations of the Reports Sub-Team?

Yes No

If you indicated no, please identify the showstoppers regarding these recommendations:

Please note any feedback [comments or suggestions]:

Are there other areas that require attention?
