

SATERN for Supervisors

Updated: December 2009

Session Objectives

At the end of the session, participants will be able to:

- Describe SATERN
- Log in to 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: 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 and career development resources.

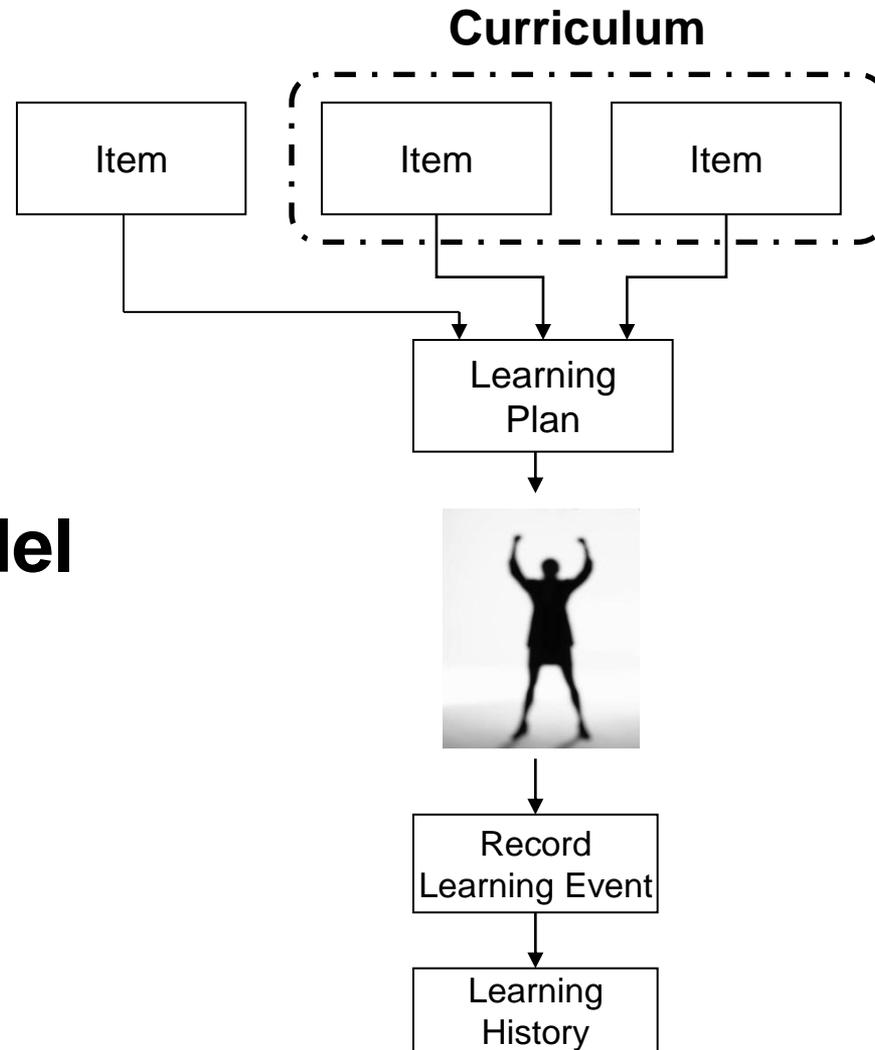
The screenshot shows the SATERN web application interface. At the top, there is a navigation bar with the NASA logo, a search bar, and links for 'Home', 'Search Catalog', 'Help', 'Check System', and 'Logout'. Below this is a main header with the text 'System for Administration, Training, and Educational Resources for NASA'. A secondary navigation bar contains tabs for 'Personal', 'Learning', 'Career', 'Catalog', 'Organization', 'Reports', and 'My Employees'. The main content area is personalized for 'Jennifer Myers' and includes a welcome message, a 'Welcome Jennifer Myers' section with a date '9/23/2009', and a brief overview of SATERN. There are three main sections: 'Personal' (managing profile and settings), 'Learning' (accessing the Learning Plan), and 'Career' (creating an Individual Development Plan). On the right side, there is an 'Alerts' section with two red warning icons: 'You have learner training approvals' and 'Your Talent Profile is Incomplete'. Below the alerts is a 'Catalog' section with links to 'View all available instructor-led items', 'View all available online items', and 'Browse Catalog'. There is also an 'IDPs' section with a link to 'IDP >>' and a message stating 'There are no relevant items for this learner.' At the bottom right, there is a 'Learning Plan' section with a 'Go to Learning Plan >>' link and a table with columns for 'Title', 'Type', and 'Required By'. The table contains one entry: 'BOOKS 24 X 7' with a computer icon in the 'Required By' column.

What Does SATERN Do for Supervisors?

SATERN provides supervisors a “one-stop” approach to managing NASA training activities. Through SATERN supervisors 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



Menus for SATERN functions can be found across the top of the screen

When you roll your mouse over a top menu option, its submenu displays in the menu bar

The screenshot shows the SATERN main menu with a navigation bar at the top containing: Personal, Learning, Career, Catalog, Organization, and Reports. The 'Personal' menu is expanded, showing a list of options: Home, Approvals, Order Status, Order Tickets, Profile, Regional Settings, My Communities, and Skills. A yellow callout box labeled 'Main Menu' points to the navigation bar. Another yellow callout box labeled 'Sub-menu' points to the expanded 'Personal' menu. The main content area includes a user profile for 'SHUKLIN', a red alert box stating 'Your Talent Profile is Incomplete', and a 'Catalog' section with links to view instructor-led and online items. A footer note provides contact information for the NSSC Contact Center.

Hint: Use the menus to navigate and not the browser's "back" button

SATERN for Supervisors

Module 2: Working with Employee Records

Logging into SATERN

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

Need help accessing SATERN?

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

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



Welcome Jennifer Myers

9/22/2009

Welcome to SATERN, NASA's official learning management system. The System for Administration, Training, and Educational Resources for NASA (SATERN) provides simplified one-stop access to high-quality training products and processes to support learning and development.

SATERN provides desktop access to training enrollment and continuous learning for the NASA workforce. Find out more information on the SATERN Informational Web site or contact your Center training office.

For assistance, contact the NSSC Contact Center at 1-877-NSSC-123 (877-677-2123) or NASA-satern.support@nasa.gov.



Personal

The Personal menu provides you with tools to manage your Profile and Regional Settings.



Learning

The Learning menu contains most of the tools that you will access the most frequently, the most important of which is the Learning Plan. The Learning Plan allows you to access your assigned online learning or register in instructor-led learning.

Alerts

- You have learner training approvals»
- Your Talent Profile is Incomplete»

Catalog

[View all available instructor-led items»](#)

[View all available online items»](#)

[Browse Catalog»](#)



IDPs

[IDP »](#)

There are no relevant items for this learner.



Learning Plan

[Go to Learning Plan »](#)

Title	Type	Required By
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Functionality for Supervisors

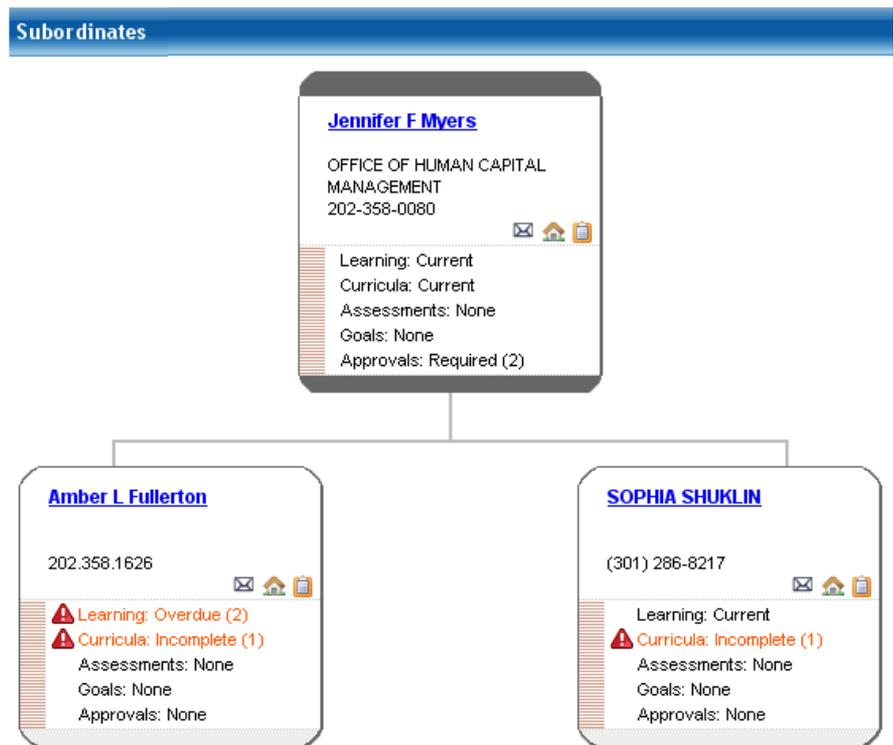
As a supervisor, you have the ability to perform the following managerial duties in SATERN:

- View employee records
- Approve enrollments
- Assign items (learning activities) to employees
- Run reports

Viewing Employee Records

- Supervisors can view records of direct reports:
 - Learning Plans
 - Curriculum Status
 - Registrations
 - Learning History

- Select **My Employees, Subordinates** from the sub-menu to view the screen.



Viewing Employee Records

- Select a user action by choosing one of the icons:

 - Send Email

 - Home

 - Snapshot

[Amber L Fullerton](#)

202.358.1626





 Learning: Overdue (2)

 Curricula: Incomplete (1)

Assessments: None

Goals: None

Approvals: None

- Snapshot screen shows a summary for employee.

Amber L Fullerton

amber.l.fullerton@nasa.gov
202.358.1626

Date in Position: 8/26/2009
Hire Date:

Prior Positions:

Performance:
No Reviews have been completed.

Strengths:
No competencies have been assessed.

Areas for improvement:
No competencies have been assessed.

Learning Plan
2 behind, 5 on target Go

Title	Due Date	Status
 SENSITIVE BUT UNCLASSIFIED AWARENESS TRAINING	2/14/2009	Available
 BASIC IT SECURITY FOR 2009	5/29/2009	Available
BOOKS 24 X 7		In progress

[more]

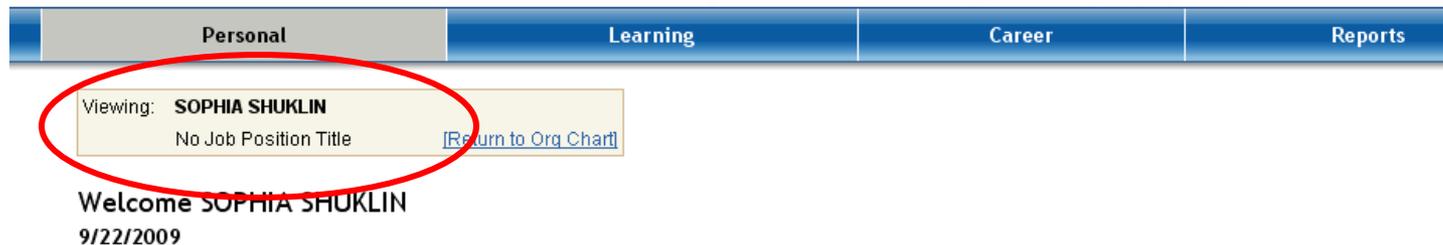
Curricula
1 Incomplete, 0 Complete Go

Curriculum Title	Next Action Date	Status
 HQ Required Training for Contractors	5/29/2009	Incomplete

Competency Assessments
There are no assigned assessment processes for this user. Go

Viewing Employee Records

- When clicking on the Home icon  , the menu bar will indicate that you are viewing records for an employee. When you are in an employee record all menu items will pertain to that user.



The screenshot displays a horizontal menu bar with four items: Personal, Learning, Career, and Reports. Below the menu bar, a yellow box contains the text: Viewing: SOPHIA SHUKLIN, No Job Position Title, and a blue link labeled [Return to Org Chart]. Below this box, the text reads: Welcome SOPHIA SHUKLIN, 9/22/2009. A red circle highlights the yellow box.

- Click on [\[Return to Org Chart\]](#) link to exit employee view.

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 direct reports.

- These functions include:
 - Approving enrollments
 - Adding and removing items from the learning plan
 - Running reports

Approving Enrollments

- As a supervisor, you will be responsible for approving enrollments in SATERN for your direct reports.
- Not all learning activities require supervisor approval. This will vary by course.
- You will receive an e-mail notification when there is an approval that requires your review.

- There are 2 ways to access Approvals in SATERN:
 - Click on the **Alert** on the Home Page or
 - Select **Personal** then **Approvals** from the Menu

Approving Enrollments

- You will see a list of pending approvals. Click the  next to the employee's name to see additional details.
- Remove the checkmark from the checkbox "Enter Reasons for Approvals or Denials" unless you want to enter a reason and have it e-mailed to the user.
- Select **Approve**, **Deny** or **Skip** for each submitted request.

Pending Reviews and Approvals

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 (2)**

Training

▼ Internal Training (2)

Enter Reasons for Approvals or Denials All Direct Reports Only [Next](#)

<u>Learner Name</u> ▲	<u>Title</u>	<u>Price</u>	<u>Type</u>	[Approve All/Deny All]
▶ Fullerton, Amber L	SATERN ADMINISTRATOR TRAINING FOR LEVEL 1 & 8 ADMINISTRATORS	0.00 US Dollar (USD)	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.
- Employees can also add items to their plan.
- As a supervisor you have the ability to add or remove a learning activity from the learning plans of your direct reports.
- To access and manage employee learning plans in SATERN
 - Select **My Employees** then **Learning Plans** from the Menu.

The screenshot shows the SATERN navigation interface. At the top, there are tabs for Personal, Learning, Career, Catalog, Organization, Reports, and My Employees. The 'My Employees' dropdown menu is expanded, showing options: Dashboard, Subordinates, Learning Plans (highlighted in blue), Registrations, and Assessments. Below the menu, the 'Manage Learning Plan' section is visible, including a 'Select Management Action' bar with radio buttons for 'Add Items and Curricula' and 'Remove Items'.

- Select the appropriate management action by clicking the circle for **Add Items**. Then click **Next**.

Adding Items

- On the list of your direct reports, choose learners:
 1. Click the **Select User** checkbox next to each employee to whom you want to assign an item
 2. Click **Add Checked**
 3. Click **Next** button

Manage Learning Plan

Select Management Action → **Select Learners**

The screenshot shows a web interface for managing a learning plan. At the top right, there are three buttons: 'Previous', 'Next', and 'Add Checked'. Below these is a link 'Select All / Deselect All'. The main part of the interface is a table titled 'Select Learners'. The table has two columns: 'Learner Name' and 'Select User'. There are two rows of data: 'Fullerton, Amber L' and 'SHUKLIN, SOPHIA'. The 'Select User' column contains checkboxes for each row. At the bottom right of the table, there is another link 'Select All / Deselect All'. Red circles highlight the 'Add Checked' button and the checkboxes in the 'Select User' column.

Learner Name	Select User	Include Subordinates
Fullerton, Amber L	<input type="checkbox"/>	
SHUKLIN, SOPHIA	<input type="checkbox"/>	

Adding Items

- Enter a keyword on the search screen to search for items to add to the Learning Plan.

Manage Learning Plan



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 you want to add to the plan.
- Click **Add Checked** button.

Add Checked

[Select All / Deselect All](#)

Search Results		Type	Add
2008 NASA HEADQUARTERS SECURITY AWARENESS TRAINING			<input type="checkbox"/>
ACCESS CONTROL AND PHYSICAL SECURITY			<input type="checkbox"/>

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

Edit Information					
Title	Type	Assignment Type	Assign Date		Remove
2008 NASA HEADQUARTERS SECURITY AWARENESS TRAINING		REQUIRED Select	8/26/2009	<input type="checkbox"/>	<input type="checkbox"/>

Adding Items

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

Assignment Types 

[Refine Search](#)

View Assignment Types Results

ID	Description	
MANDATORY	Federally Mandated	Select
OPTIONAL	Optional	Select
RECOMMENDED	Highly Recommended	Select
REQUIRED	Required	Select

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

Removing Items

- The process for removing items from the learning plan is the same as for adding items.
- It may be helpful to view the employee learning plan first to determine which items you wish to remove before using this functionality.
- Once you remove an Item you 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: *Running Employee Reports*

Running Employee Reports

- As a supervisor, you have the option of running reports that include data about your direct reports.
- SATERN allows you to generate a number of different standard reports including:
 - Learning Plan
 - Learning History
 - Item request
- All reports have the same options to describe how you want to run the report.
- To run a report select **Reports** from the Main Menu.

Running Employee Reports

- After you select a report, you will have a choice of running a report for yourself only, your direct reports, all in your chain of command, or all.

Reports 

[← Back to Browse Reports](#)

Run Learning Plan

Learner: Self Direct Subordinates All Subordinates All

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Mask Learner IDs

Page Break Between Records

Item Required Date Assignment Type Curriculum

All Needs Requirements

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

Running a Report for One Employee

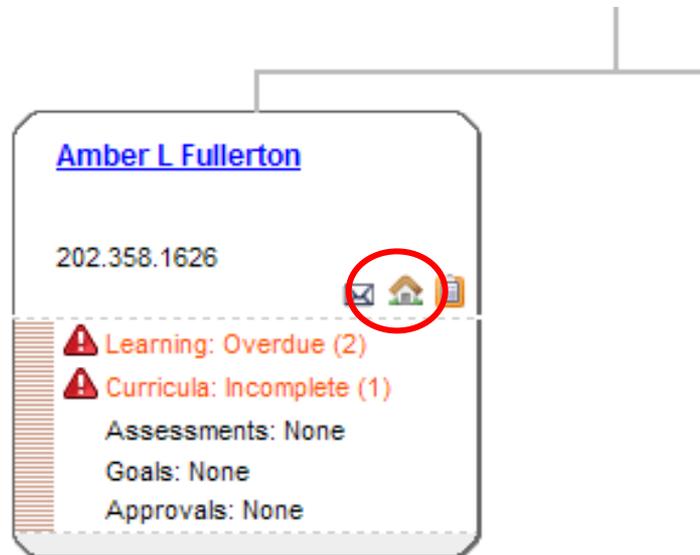
- If you need to run a report for only one employee, select [My Employees](#) from the main menu, [Subordinates](#) from the sub-menu.



- Subordinates screen will display.

Running a Report for One Employee

- In the subordinate window, click on the Home  icon and change to the selected user.



- From the Reports menu select the report you want to run for that individual.



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>.