Learning Management

System for Administration, Training & Education Resources for NASA

SATERN MIGRATION & UPGRADE

SATERN Rules and Process Guide for Administrators

March 2018

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Document Revision History

Chapter	Date	Revision Description
Global	9/22/2008	Section added: Deactivation of Agency Mandatory Courses
Global	9/22/2008	Section added: Assignment Types for Federally Mandated Training
Scheduling	9/22/2008	Section added: Scheduled Offering, Calculating Per Participant Costs
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Appendix H	9/22/2008	Section Added: Learner Reference Code Values (formerly Addendum)
Upgrade Changes	12/07/2009	Business Rules sub-team report (11/10/2009)
OWG-approved additional business rules or changes	05/03/2010	Business rules proposed and approved immediately post-upgrade
OWG-approved additional business rules or changes	11/15/2010, 01/20/2011	Business rules proposed and approved (Use of the SF-182 for Conferences revised)
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Update Rules to Support version 1608		Proposed by sub-team March 2018 during migration/upgrade to SAP SaaS version 1608

Introduction

The implementation of NASA's e-Training Learning Management System (LMS), the System for Administration, Training, and Educational Resources for NASA (SATERN), changed current training business processes, as well as systems that were used for training registration, enrollment and delivery. It continues to improve Agency services and save taxpayer dollars, reduce redundancies through the consolidation of multiple learning systems, contribute to improved consistency and efficiency in training operations, and support the development of NASA employees.

This document identifies areas where system functionality cannot enforce the Agency-defined usage of the system and provides guidance to enable compliance with Agency-defined methods and procedures. It is the result of the SATERN Business Rules sub-team, comprised of Discipline and Center Representatives, whose job it is to document agreed-upon business rules for the SATERN LMS rollout. This Guidebook contains the rules that the sub-team recommended, the Transition Teams endorsed, and SATERN Governance approved. It is a living document that will adjust to the changing needs of NASA.

SETTING THE CONTEXT

The SATERN e-Training effort is one of the President's Management Council approved e-Government initiatives that supports the President's Management Agenda (PMA) for improving the Government's responsiveness to citizens and efficiency of operations. The vision of the initiative was 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.

SATERN provides Learners with desktop access to training information and courses. Through the implementation of a centralized LMS, the training community within NASA has new tools, functionality and capabilities for training administration and delivery. Three legacy systems were transitioned to the e-Training LMS:

- AdminSTAR—training administration system used by all Center Training Offices.
- NORS—(NASA Online Registration System) allowed students to register online for courses and was integrated with AdminSTAR, but subsequently only used at MSFC and KSC.
- SOLAR—(Site for Online Learning and Resources) online custom content courseware system that was used throughout NASA.

For the e-Training transition, NASA selected the SuccessFactors Learning Management System software, called SATERN, which is a comprehensive system that enables

process standardization and provides timely, up-to-date information. Centers are able to identify training requirements, deploy learning and track its completion. SATERN also allows for tracking of certifications, assessment of competencies, online enrollment and testing, course Catalogs and facility management.

VERSION 4.0

This is a replacement of, not a supplement to, all previous versions of the *SATERN Rules and Process Guide for Administrators*, and incorporates all changes made to the point of the introduction of the SuccessFactors/SAP Software As A Service (cloud) version 1608, March 2018.

BUSINESS RULES DEFINED

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 system and / or describe standard Agency practice when using the system.

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.

HOW TO USE THIS DOCUMENT

The Process Guidebook is meant as a reference that enables SATERN Administrators to understand and easily identify specific guidance that is required by NASA. The document is arranged by functional subject area, based on the structure in SATERN. Administrators can refer to the table of contents, the list of rules in each section or to the index at the end to easily find the information or topics. Process flows and screen shots are provided where applicable to describe functionality. This document is not a training guide. It is assumed that Administrators using this guidebook have been trained on SATERN, are familiar with current Center processes, and are comfortable performing the functions in the system for which they are authorized.

SATERN Business Rules and Process Guidance

With the exception of the Global section below which applies to the entire system, the sections of the document follow the **top navigation** found in SATERN so Administrators can refer to the guidebook alongside the application, as needed.

Each ***situation*** is followed by the NASA ***Business Rule, Process, or Guidance***.

GLOBAL

Global rules for SATERN apply to the system as a whole.

NASA Official Use Only

Situation: NASA systems are for the official use of NASA employees and contractors. SATERN is the Agency system to record and manage NASA Training and Development events. While some training events could be considered important to a Learner, it is important that the system is used for official use only.

> **Rule**: Record only training events that were paid for by NASA or were attended during NASA working hours.

Data Entry and Data Consistency

Situation: SATERN does not fully enforce data consistency in free-form fields; other fields use drop-down reference tables where only pre-defined choices are allowed. Ensuring that NASA data is clean and consistent has many benefits: Learners see an interface that is uniform and easily readable and reports contain clean and complete data. Administrators must take responsibility for adhering to detailed data entry rules.

Rule: Administrators shall use the following naming conventions when entering data:

1. IDs (except User-ID) can consist of letters and numbers and shall be entered in upper case with dashes where spaces would be (e.g., ARC-SAFETY). All Domain specific IDs shall be prefixed with the Center's or Discipline's acronym (i.e., GRC-, JSC-, KSC-, ITS-, SMA-, HQ-, AG-, etc.). If there is a need to have additional spaces in the ID, only dashes should be used (e.g. ARC-SAFETY-FIRE).

    a. Assignment Profile ID
    b. Catalog ID
    c. Class ID
    d. Community ID
    e. Content Object ID
    f. Content Package ID
    g. Curriculum ID
    h. Document ID
    i. Domain ID
    j. Equipment ID
    k. Exam ID
    l. Facility ID
    m. Instructor ID
    n. Item ID
    o. Location ID
    p. Material ID
    q. Objective ID
    r. Process ID
    s. Question ID
    t. Survey ID
    u. Group ID
    v. Program ID
2. Learner profile data shall be entered in upper case letters.
3. The following data shall be entered using all upper case letters:

    a. Course Titles
    b. Learner Defined Fields (custom fields)
    c. Learner and Instructor Names and Titles

4. When setting up facilities and locations, use upper case with dashes in the following format: CENTER-FACILITY-LOCATION.
   Facility means building and Location means room number. (Example: GRC-B15-R101).
5. All Descriptions shall be entered using a combination of upper and lower case letters.

Deactivation of Agency Mandatory Courses

Situation: Agency mandatory courses (e.g., *No FEAR)* are often automatically assigned to new hires by Centers. If a course is deactivated, Learners are unable to access the course.

Therefore, the following business rule ensures that Center Administrators receive a communication before the course is deactivated.

> **Rule**: When a course owner decides to inactivate an Agency mandatory online course within SATERN, the following process must be followed, unless a deviation is agreed upon by SATERN Governance and the course owner:
>
> 1. The course owner will notify the SATERN Online Training Support Services and the NSSC.
> 2. The course owner will pick a deactivation date that will be no less than three (3) working days from the date of the communication to the parties listed in step four.
> 3. If the course owner wants a specific communication to be sent out, they will attach that communication to the message sent to the parties listed in step one.
> 4. The NSSC will send the communication to those within the Centers that they think need to know within 24 hours of receipt of the communication from the course owner. The course owner will notify any of their key stakeholders that they think need to know.

Assignment Types for Federally Mandated Training

Situation: Without clear guidance to Content Owners and SATERN Administrators regarding when an Item should be assigned an Assignment Type of mandatory, courses are incorrectly classified, leading Learners to be misinformed of their training requirements.

> **Rule**: The mandatory Assignment Type should be assigned only to courses that have been approved through the formal federally mandated training vetting process. Approved courses will have been vetted by the Office of Human Capital Management and the Office of General Council, and will meet the Office of Personnel Management definition for federally mandated training. No other courses should be labeled as mandatory. Once an approved course has been given an Assignment Type of mandatory, the SATERN Administrator should not override the Assignment Type without prior approval from the Content Owner.

Titling Center-specific Copies of Federally Mandated Training Courses

Situation: Centers copy Agency-wide federally mandated training courses for their Center-specific substitutes. Therefore, consistency in titling is important for reporting and gauging course completion.

Rule: Center SATERN Administrators who duplicate Agency or federally mandated training courses will retain the Agency-level Item ID and preface it with the Center acronym for their local substitute courses. The course Title will not be changed from the original Agency-level course. An example is provided below:

Level	Item ID	Title
Agency	ITS-010-001	BASIC IT SECURITY FOR 2010
NSSC	NSSC-ITS-010-001	BASIC IT SECURITY FOR 2010

Mandatory Fields

There are two types of mandatory fields in SATERN. The first type is fields that are required for the software to work properly, for example, every Learner must have a User ID and a Domain. These fields are identified in the system with red asterisks so that Administrators are reminded to populate those fields.

The second type is fields that NASA has determined are required to achieve usability, data integrity and reporting needs. For example, the Transition Team determined that the Description field in the Item Record be made NASA-mandatory. This is an optional field in SATERN, but it should be made mandatory to ensure that Learners have a clear understanding of the resources that are available to them to make informed decisions.

NASA must comply with mandatory Office of Personnel Management (OPM) requests for training information. In order to satisfy specific reporting requirements mandated by OPM, NASA will use Custom Fields, also referred to as Custom Columns, to capture NASA-specific information that would not otherwise be possible if the SATERN software were implemented without customization.

The SATERN Custom Fields were determined during the configuration sessions for the most recent upgrade. The required custom fields are identified with a red asterisk and are required by OPM and NASA to satisfy specific reporting requirements.

Situation: NASA's compliance, usability, data integrity and reporting needs will not be met if Agency-wide guidelines are not established to provide a common understanding of entering data into SATERN. Administrators must have guidelines on which fields must be populated and what constitutes acceptable entries.

Rule: Administrators shall populate the fields defined as NASA-mandatory fields and enter data outlined in the SATERN Data Definition Table of Acceptable Codes, when appropriate. (Note that the word 'mandatory' implies that the fields are highly recommended and important to NASA in many ways and Administrators should do everything they can to ensure that the fields contain appropriate values.) Zero (0) and None are acceptable values.

Appendix B contains the SATERN Mandatory Fields. This section contains screenshots identifying the mandatory fields, as well as the screens where they are located in the system. This will aid understanding by providing context for the field.

Appendix C contains the SATERN Custom Field Data Definition Table that contains the Custom Field data elements, acceptable codes, descriptions and guidelines.

Document Repository

Situation: Some course owners use SATERN as a document repository to place commonly used documentation in a centralized place where the Learner can access it. This documentation does not require a certificate and is purely for informational purposes. Setting-up these documents like Online Content allows Learners to more easily find and access them.

> **Rule**: Documents must meet the requirements of Section 508 of the Rehabilitation Act. They may be housed on SATERN or on an external Web server. Documents require that a Point of Contact (PoC) be listed in the Item Record, and this PoC will be responsible for making sure that the document remains up-to-date and accessible. Documents need to be in a format that can be opened on all platforms supported by SATERN using software that is freely available. Section 508-conformance must be verified by the SATERN Online Training Services (https://www.nssc.nasa.gov/customerservice > Training > Online Training Services) before posting. Documents must be directly related to an Item, Scheduled Offering, or Online Content, and use the naming convention listed in the Data Entry and Data Consistency section on page 9. Documents inactive for more than 12 months may be automatically removed from SATERN unless otherwise instructed by owners.

LEARNER MANAGEMENT

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

Note: Users and Learners are used interchangeably to refer to NASA employees using SATERN.

Detailees

Situation: Detailees are employees on assignment away from their home Center who cannot view the Catalog of the Center to which they are detailed. This is a special circumstance that requires definition.

> **Rule**: Since detailees will only have access to their home Center's Catalog, they should work with the Training Administrator where they are detailed in order to find out about classes; or, a RA-1admin at the host center may create an Assignment Profile to grant access to the host Center's Catalog. See section below on "Assignment Profile for Catalogs" or the Creating an Assignment Profile job aid (https://satern.nasa.gov / > Resources > For SATERN Administrators > Job Aids

Other Center Training

To maximize civil service employee enrollment in onsite training, Centers frequently open their courses to employees at other Centers. In order to allow Learners to use the self-registration features in SATERN to request training at Centers other than their home Center, a specific process must be followed to allow Administrators to efficiently manage enrollment.

Situation: The detailed flow for the Other Center Training process will be detailed in the job aid Creating an Assignment Profile, D. Assign Catalogs to Learners via Assignment Profiles on the SATERN Information Web site (https://satern.nasa.gov / > Resources > For SATERN Administrators > Job Aids). However, there are two rules, that when used together, support the process for Other Center Training. The first is to make mandatory the use of a Center prefix for the Facility Description field.

> **Rule:** Administrators shall add the Center prefix to all Center Facility Description fields.

The second is to use a four-step approval process that has been created specifically to address the Other Center Training scenario with the last step in the chain being the Host Center Training Office role.

Rule: Administrators shall use the four-step Supervisor/Training Coordinator/Training Office/Center-specific Host Center Training Office (HCTO) Approval process whenever they wish to make a course available to Learners from other Centers. When the Center-Specific HTCO approval role is assigned, the Admin shall assign the "NASA" control Domain to ensure the approver will review requests from Learners at all NASA Centers.

Agency Process: The Administrator creating the Scheduled Offering using the HCTO four-step approval process needs to notify:

- All Center SALs to ensure that roles in the second (i.e., Training Coordinator) and third (i.e., Training Office) steps of the HCTO approval process are assigned to the appropriate individuals in their Center Training Office for the Scheduled Offering. These second and third steps in the HCTO approval process should be completed within 48 hours for each step. These two levels of approvers should approve civil service employees and contractors equally.
- The Host Center SAL to ensure that the role in the fourth (i.e., HCTO) role is assigned the Control Domain of NASA and that the role is assigned to someone in their Center Training Office for the Scheduled Offering approval. This approver should approve civil service employees, and then follow the contractor policy for contractors as outlined below.
- The Center SAL that wants to offer a course at another Center is responsible for contacting the Host Center SAL to make sure they have someone assigned the HCTO role prior to scheduling the course.

Contractor Policy

If approved to do so, contractors are able to utilize SATERN to self-enroll in Scheduled Offerings given the following circumstances:

- There is a contractor sub-Domain at each Center.
- Contractors will be able to launch online courses and enroll in onsite Scheduled Offerings according to their Center policy. [Note: System functionality allows Centers the flexibility to prioritize civil service employees ahead of contractors using the waitlist.]
- Even when a seat is available, a contractor may not be allowed to attend due to contract restrictions. Please check with the COR to determine if participation in this training is allowed.

Special circumstance: IPAs

Situation: There are a limited number of people working under the Inter-Governmental Personnel Act (IPAs) across the Agency. IPAs are contractors filling a civil service employee role. Like other contractors, IPAs will be able to self-register for Scheduled

Offerings. However, in their capacity as a civil service employee equivalent, they should be given the same priority as civil service employees for selected Scheduled Offerings.

> **Rule**: IPAs should work closely with their Center Training Office to ensure the Training Office knows their status, so that their role as a civil service employee is taken into consideration when enrolling in Scheduled Offerings.

Reporting in the Contractor Domain

Contractor Training Coordinators are company representatives that are responsible for the training of the contractors in their company. They are the first line of support for contractor employees and are frequently located in the Training Office at the Center.

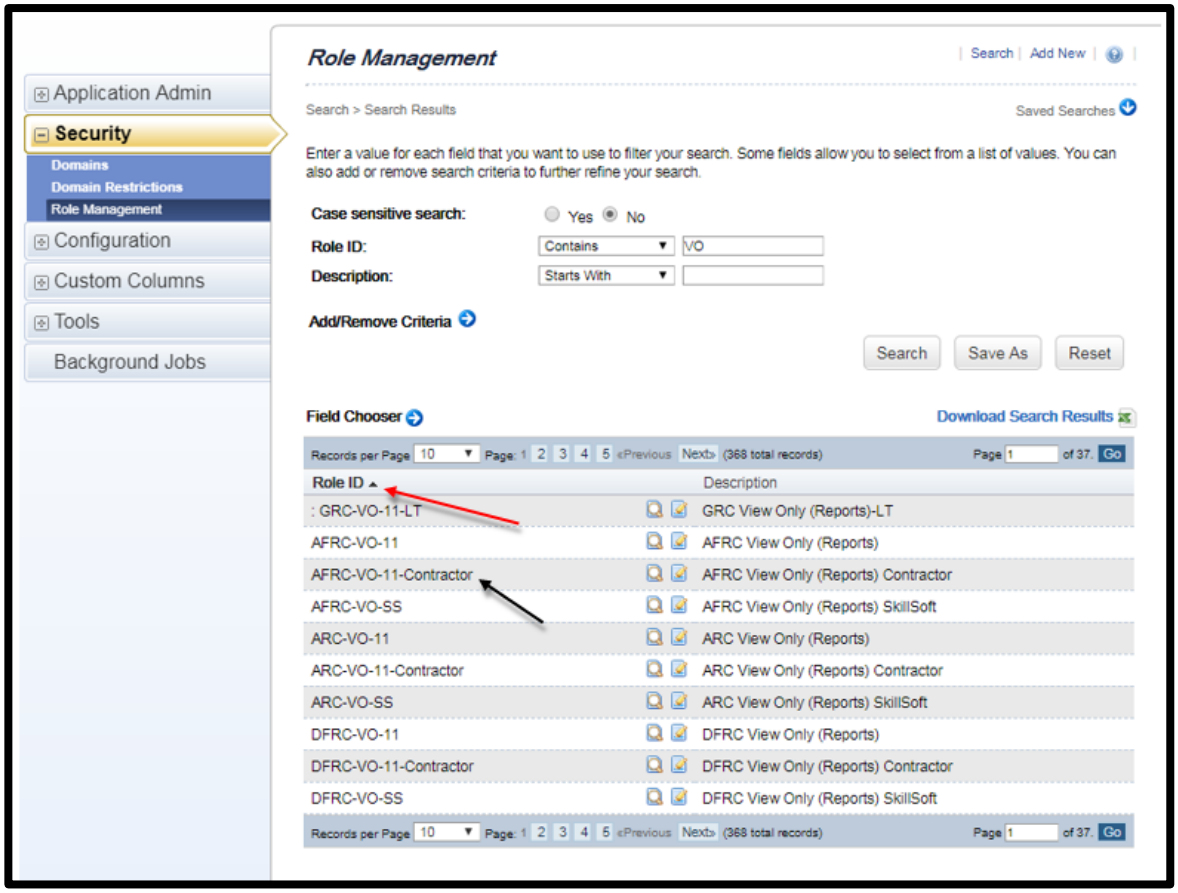
Reporting on the Contractor Domain at a Center was initially restricted to the Training Office. There was concern that since a contractor Training Coordinator could see the Training History of any contractor employee, including contractors from other firms, an advantage may be given to that company.

After further review, no conflicts of interest or union issues have been identified. The SATERN Core Team has therefore updated the contractor policy to allow contractor Training Coordinators to have reporting rights into the Center Contractor Domain in order to comply with NASA reporting, certification or training requirements.

Contractor Training Coordinators that wish to have reporting rights in the Contractor Domain at their Center should make their request to the SAL at their Center or call the SATERN Help Desk at NSSC at 1-877-NSSC-123.

Contractor Process

Based on the policy statement above, each Center can assign the CENTER-VO-11-Contractor role to an Administrator as shown below (GRC-VO-11-Contractor).



Contractor's access to Items and Scheduled Offerings is controlled through the creation of Catalogs. Administrators that create Catalogs assign them through an Assignment Profile. In the Assignment Profile you can select the sub-Domains of Learners that will have access to a Catalog. If they wish to create a Catalog exclusively for contractors, they will select the Contractor sub-Domain in the Assignment Profile.

Therefore, any Items or Scheduled Offerings that are placed in that Catalog will only be accessible by contractors. Or, an Administrator can select the Level 1 Domain, which will include all sub-Domains under that top level Domain (including contractors). In this case, all civil service and contractor employees would have access to Items and Scheduled Offerings placed in this Catalog.

Account for Pending Civil service employees. SATERN Administrators shall not give spots in a Scheduled Offering to contractors if any civil service employees are in the approval process but are not yet enrolled (i.e. registration status is "pending"). When any Administrator reviews the registration tab of a Scheduled Offering, they should assume that the civil service employee Learners with a status of Pending are going to get into the course and then calculate the number of contractors to enroll to fill the course. If a civil service employee registers after a contractor is enrolled in a class that is full, (i.e., no vacancies), then the contractor must give up the enrollment to the civil service employee, if the civil service employee registration is approved within the timeframe specified below.

When the Administrator places a Scheduled Offering in a Catalog that is accessible to contractors, they will select at least a two-step approval process that includes the supervisor in the first step. It is important that all steps in the approval process have a designated approver assigned. For contractors, the Training Office shall set up one Administrator as the TC for the Contractor sub-Domain so that all requests come to that one person. That person will hold all those requests until the registration cutoff date. If there are seats available in the offering at that point, they will approve enough contractors to fill the course and then waitlist the remaining contractors (managed through Administrator tab). The final approver (typically a Center Administrator) in the approval processes used for Scheduled Offerings will hold all contractor requests until the registration cutoff date has passed. If there are seats available in the offering at that point, the Administrator will enroll enough contractors to fill the course in order of date and time of registration and then waitlist the remaining contractors (managed thru the Administrator tab). Only contractors pending with the Training Office or Training Office Specialist role will be enrolled or waitlisted.

Civil service employees who are in pending status as of the registration cut-off date and time shall be dispositioned by the final approver (on that Scheduled Offering) within 48 hours (if the start date of the course is one week or less after the registration cut-off date, or if the course is an NSTC course). After the civil service employees have been approved, the Center Administrator will fill the remaining seats with contractors.

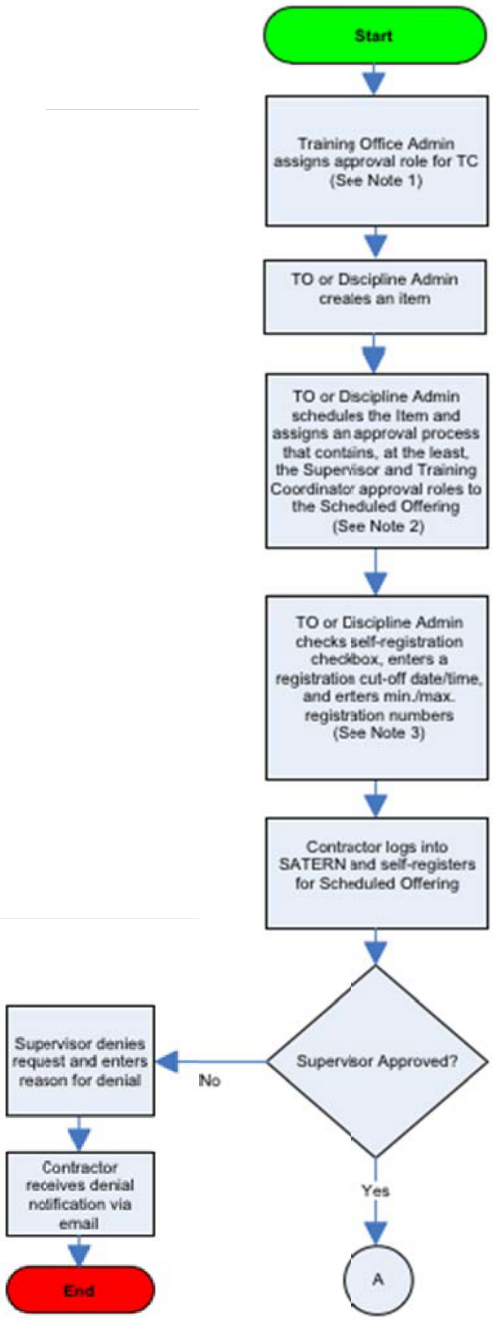
When a civil service employee requests registration via phone or email for a Center or Discipline Scheduled Offering after the registration cut-off date, and the request is five business days or more before the start of the course, the contractor who was the last to be enrolled (by registration date and time) should be waitlisted to make room for the civil service employee. The Training Office has the discretion to manage the waitlist. Any request less than five business days before the start of a course is based on space availability, and contractors will not be removed to make room for a civil service employee.

When a registration deadline is extended (e.g., due to low enrollment), the process as outlined above will continue to be followed.

Exceptions to using an approval process that contains, at the least, the Supervisor and Training Coordinator approval roles in the approval process, are for the Disciplines. For Scheduled Offerings by the Disciplines, the approval processes agreed upon between the Discipline and the Center where the training is being held will be used. For Scheduled Offerings open to other Centers, the four-step Center-HCTO approval process will be used, unless otherwise agreed upon between the Center and the Discipline Administrator.

The process flowchart on the following page describes the process.

Contractor Self-Registration



Note 1:
The TO Admin assigns the TC approval role to the organization TC's that will be doing approvals for civil servants.

The TO Admin assigns a control domain to the organization TC. The org. TC will only be able to approve training requests for civil servants within the specified control domain.

The TO Admin assigns the Contractor TC approval role to himself or a person in the Training Office. The TO Admin should select the Contractor sub-domain as the control domain.

Note 2:
The Admin assigns an approval process that contains, at the least, the Supervisor and Training Coordinator approval roles to the Scheduled Offering and checks the "Approval Required" checkbox.

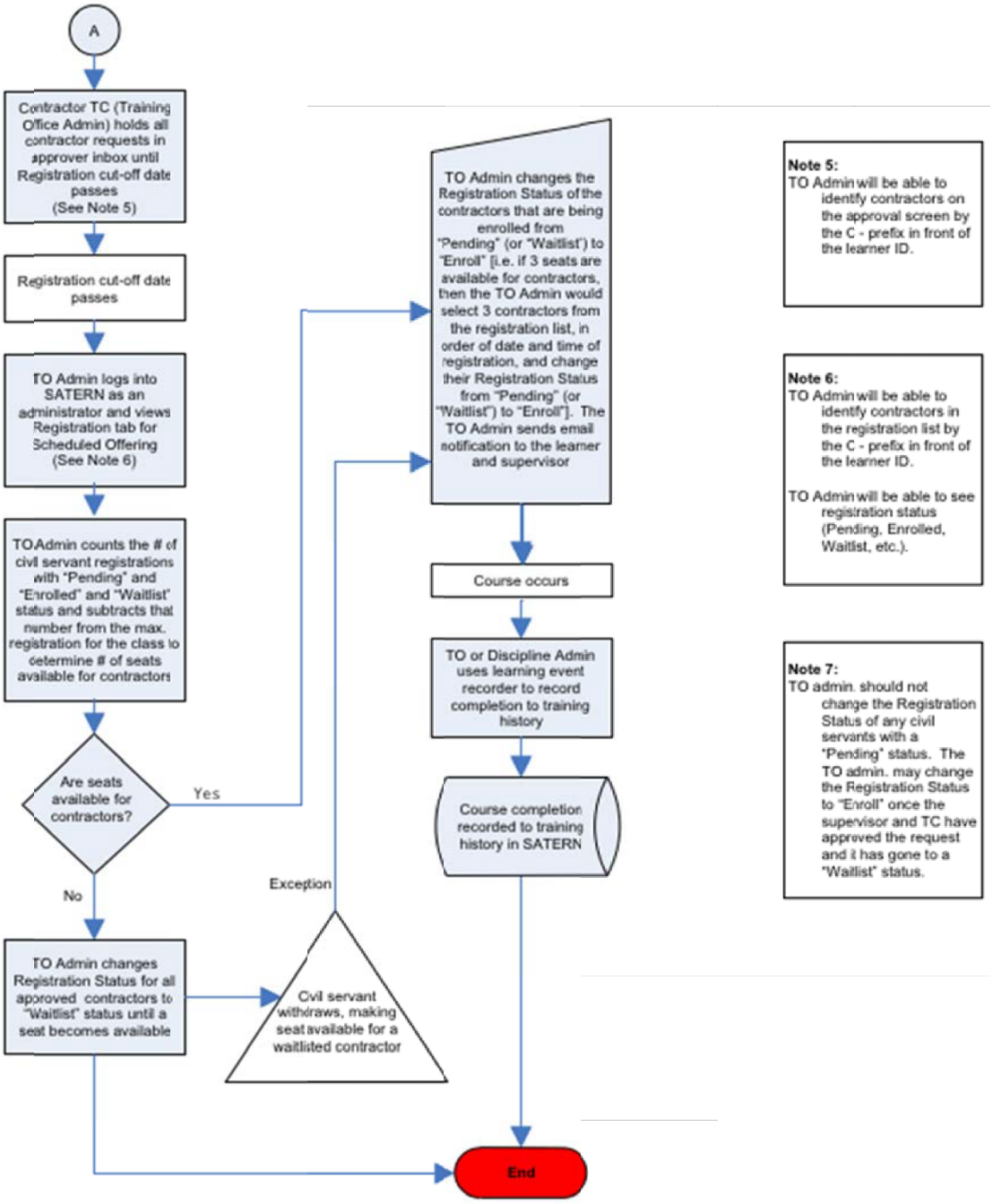
The Center Admin places the Scheduled Offering into the Center catalog (for Center courses only) so all learners within the sub-domains may self-register for it, including contractors. Discipline courses remain in the respective Discipline catalog unless otherwise agreed upon between the Discipline Admin and the Center TO.

Note 3:
The self-registration checkbox, registration cut-off date/time, and min./max. registration fields are located on the Registration tab of the Scheduled Offering.

Legend

SATERN Process

External Force/Process


A
Contractor TC (Training Office Admin) holds all contractor requests in approver inbox until Registration cut-off date passes (See Note 5)
Registration cut-off date passes
TO Admin logs into SATERN as an administrator and views Registration tab for Scheduled Offering (See Note 6)
TO Admin counts the # of civil servant registrations with "Pending" and "Enrolled" and "Waitlist" status and subtracts that number from the max. registration for the class to determine # of seats available for contractors
Are seats available for contractors?
Yes
No
TO Admin changes Registration Status for all approved contractors to "Waitlist" status until a seat becomes available
Exception
Civil servant withdraws, making seat available for a waitlisted contractor
TO Admin changes the Registration Status of the contractors that are being enrolled from "Pending" (or "Waitlist") to "Enroll" [i.e. if 3 seats are available for contractors, then the TO Admin would select 3 contractors from the registration list, in order of date and time of registration, and change their Registration Status from "Pending" (or "Waitlist") to "Enroll"]. The TO Admin sends email notification to the learner and supervisor
Course occurs
TO or Discipline Admin uses learning event recorder to record completion to training history
Course completion recorded to training history in SATERN
End
Note 5:
TO Admin will be able to identify contractors on the approval screen by the C - prefix in front of the learner ID.
Note 6:
TO Admin will be able to identify contractors in the registration list by the C - prefix in front of the learner ID.
TO Admin will be able to see registration status (Pending, Enrolled, Waitlist, etc.).
Note 7:
TO admin. should not change the Registration Status of any civil servants with a "Pending" status. The TO admin. may change the Registration Status to "Enroll" once the supervisor and TC have approved the request and it has gone to a "Waitlist" status.

An important part of the flow is the role of the Supervisor. In the Federal Government, the COR (Contracting Officer Representative) has the responsibility for all contractors working on contracts that he or she manages.

Contractor Training Policy	**NASA Policy Directive 3410.2F** reads: "Permit NASA contractor personnel to attend authorized and scheduled NASA training, provided that space is available and such attendance does not deny civil service employees the training. The training must be necessary for Government purposes. The basis for training of contractors derives from the authority to administer contracts. Contractors may, therefore, only be trained in skills that they are not required to bring to the job and, without directly reimbursing the Agency, if there is a benefit to the Agency or a governmental interest for such attendance."

Only a NASA government official can determine whether sending the contractor to training for a billable hour, rather than working that billable hour, is:

- the best use of NASA funds,
- a benefit to the Agency, or
- in the government's interest.
- **Even when a seat is available, a contractor may not be allowed to attend due to contract restrictions. Please check with the COR to determine if participation in this training is allowed.**

Note that the SATERN Supervisor is only an Approval Role used to automate approvals during the self-registration process. SATERN is not the system of record for Supervisors.

Rule: All contractors shall select a NASA government official relevant to their area as their Supervisor, if they wish to self-register for onsite training at NASA. This can be updated in the Learner's Talent Profile as shown below.

Center-Unique Learner Domains

Situation: Domains are important structural entities in SATERN and must be managed very carefully. In certain special circumstances, a Center may need to create additional Domains for Learners to satisfy a particular business need. Given their importance and the fact that only the SATERN Technical Team at NSSC can create new Domains, a process is needed for requesting Center-unique Learner Domains.

Agency Process: When requesting Center-unique Learner Domains, Centers will follow the process outlined below:

1. A Center SAL makes the Learner Domain request to the SATERN Help Desk at 1-877-NSSC-123.
2. NSSC personnel at the SATERN Help Desk write up the request and forward it to the members of the SATERN Executive Committee (EC), who represent the Office of Human Capital Management to review Change Requests and proposed business rules. EC active member list can be found on SATERN Informational Web site (https://satern.nasa.gov , Key Contacts > Program Team).
3. If the EC approves the request for a Center-unique Learner Domain, the NSSC SATERN Technical Team creates the new Domain in SATERN and informs the Center SAL who requested the work when has been completed.
4. The requesting Center has the responsibility of manually moving Learners from the current Domain to the new Domain and maintaining the data.

Note: Since the Center SATERN Administrators will have to manually keep the data up-to-date in the new Domain, the Center SAL should make the request to the NSSC. Also, there are no naming convention restrictions for Center-unique Learner Domains. Some Centers use an Organization Code of Z-0000 for Learners that have special characteristics. For example, GRC has decided to use GRC-ARMY for the Army personnel at GRC.

Reorganizations: Another type of Domain request is when a Center has a reorganization that changes Organization codes for Learners at that Center. It is important to inform the NSSC at 1-877-NSSC-123 as soon as possible prior to the reorganization so that SATERN is ready to accommodate any new Learner information that may be coming in from the daily FPPS and IDMS data feed.

Assignment Profiles

The Assignment Profile functionality provides a way to automate processes, such as assigning Curricula, to a group of Learners who share the same training needs. The Assignment Profile uses the common attributes of a group of Learners to assign Curricula. One useful way to group Learners at NASA is to assign training based on information contained in a Learner's Custom Fields. For example, if you wanted to push out training to all Supervisors, you can set up an Assignment Profile containing all Supervisors at a Center and assign a Curriculum to that group. In addition to being efficient, the group defined in the Assignment Profile is automatically updated as members of that group take on or lose a Supervisory role. SATERN Assignment Profiles will automatically add or delete the Curriculum from the Learner's Learning Plan based on the code or codes you used when you set up the Assignment Profile.

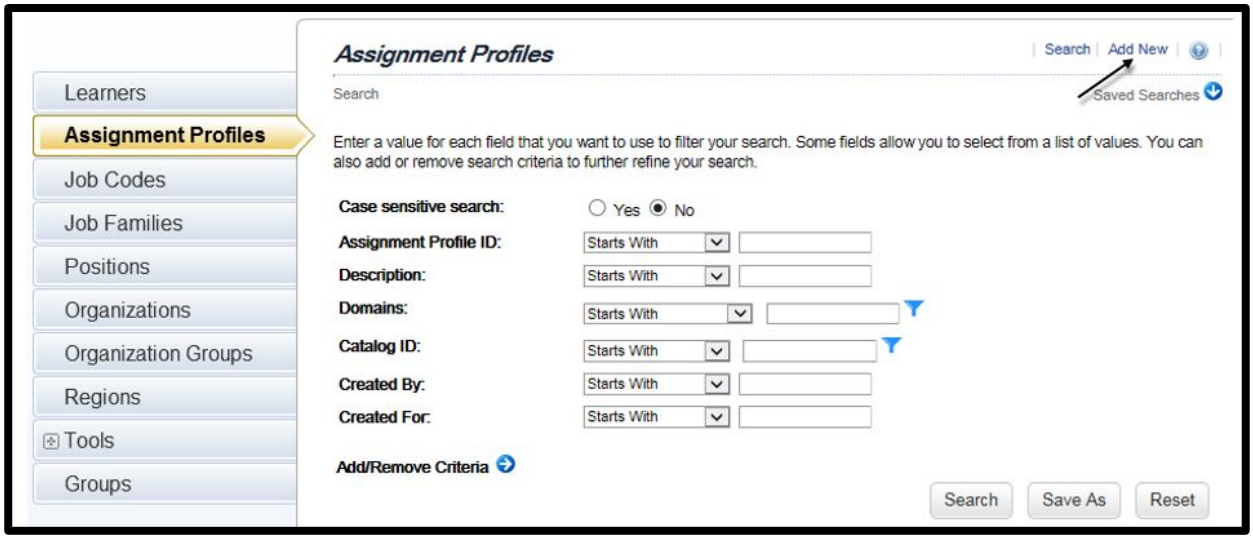
Situation: It is desirable for NASA to utilize the Assignment Profile (AP) functionality. The concern is that the function of an Assignment Profile can be complex, and the workflow should be restricted to Administrators with the "ALL" or "Level 1 Regional Administrators (RA-1)" workflows.

Agency Process: Administrators with the "ALL" or "RA-1" workflows will have the ability to preview the Learners that match the Assignment Profile. They can also use the Learner Reference Code Values table in the Appendix to select a group of Learners for use in Assignment Profiles where a referenced Learner attribute does not exist (e.g., NASA Class Code).

Assignment Profile for Catalogs: Access to view Catalogs is managed strictly through the Assignment Profile process. Only Administrators with the "ALL" or "Level 1 (RA-1)" workflows are able to create Assignment Profiles. Therefore, Center RA-1 Administrators will be responsible for creating and propagating Assignment Profiles for their Center Catalogs. NSSC will be responsible for creating and propagating the Assignment Profile for the NASA and Discipline Catalogs. Naming convention for Assignment Profiles should follow the guidelines under the Data Entry and Data Consistency section on pp. 9-10 (e.g. NASA-CATALOG-ALL, GRC-CATALOG-CS).

Step 1: Add a new Assignment Profile for Catalog Preview

A. In the Learner tab, select "Assignment Profiles" (AP). Select “Add New”.



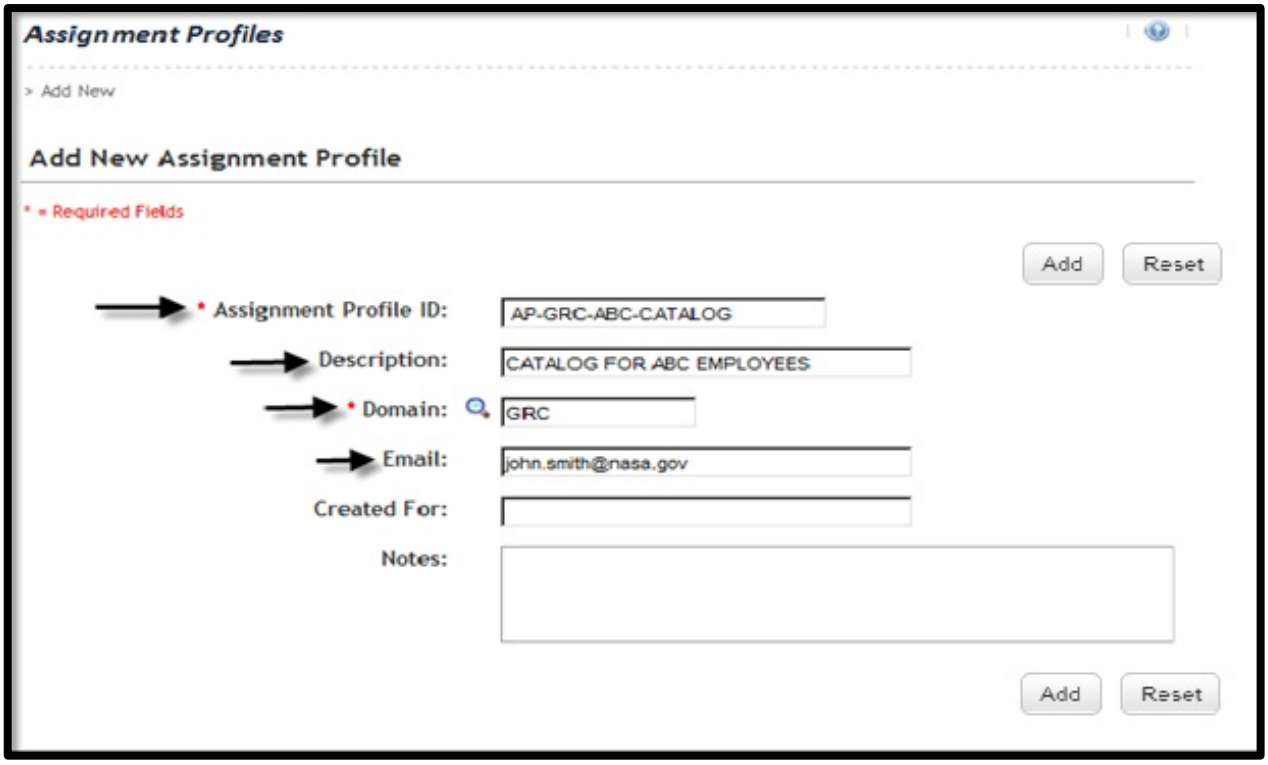
B. Enter Assignment Profile ID (Assignment Profile shall start with AP-Center Acronym-XXX, where "XXX" represents text used to distinguish the AP.

C. Enter Description

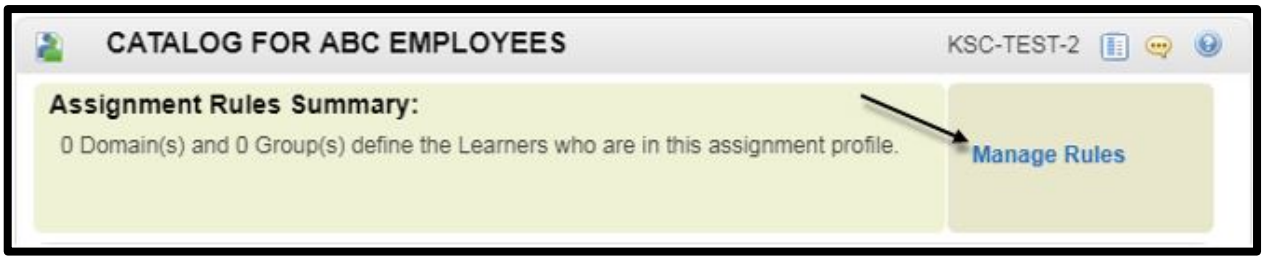
D. Select Domain

E. Enter e-mail address of person responsible for this Assignment Profile.

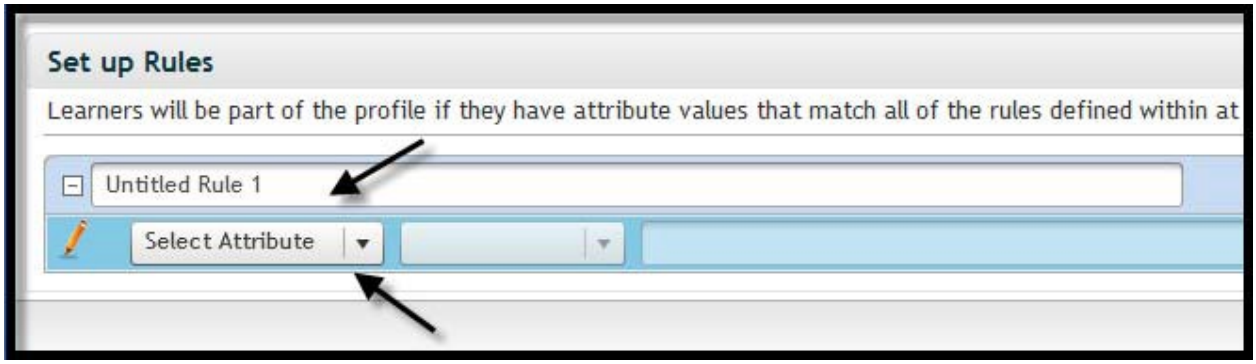
F. Click the Add button

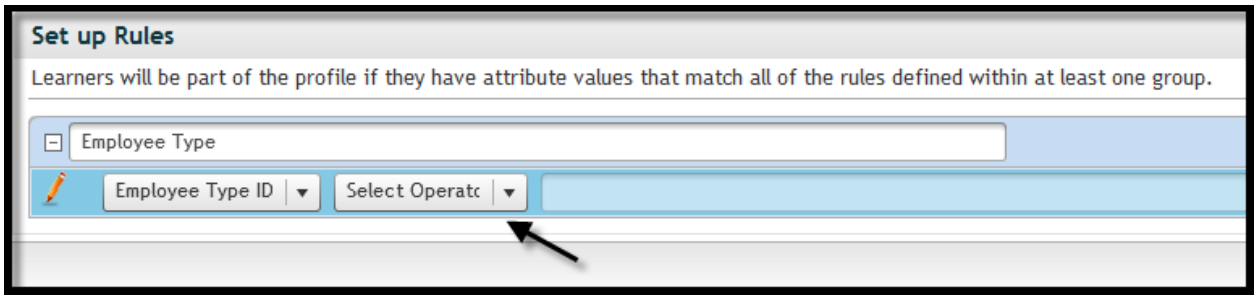


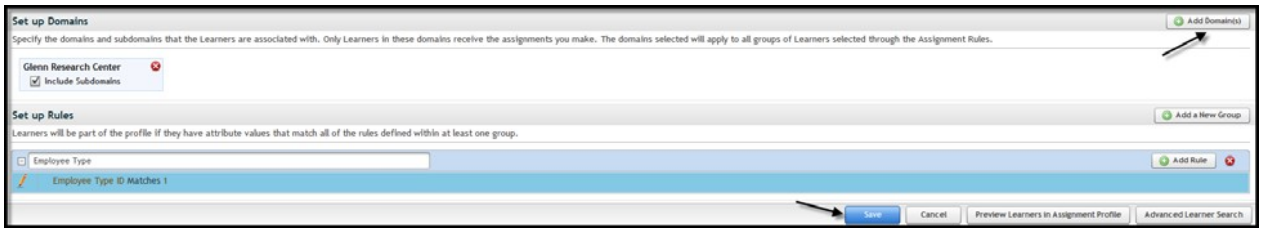
G. Define the Learner Pool by adding a rule. Click on the “Manage Rules” link. You can also click on the "Define Learner Pool" link, which can be seen in the "Recommended Next" prompt, at the top of the work area window.



H. **Note:** Attempting to enter a rule title f rst, results in a system prompt to set up the attribute first. Select the attribute from the drop down menu, then select the Operator from the second drop down menu (e.g., Matches, Contains, Starts With). Enter the attribute value. Give the rule a title. Add additional rules as needed, and click "Save" when finished.

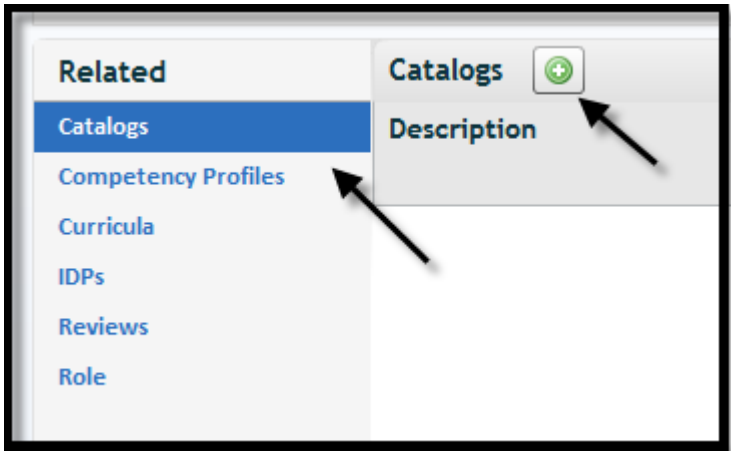




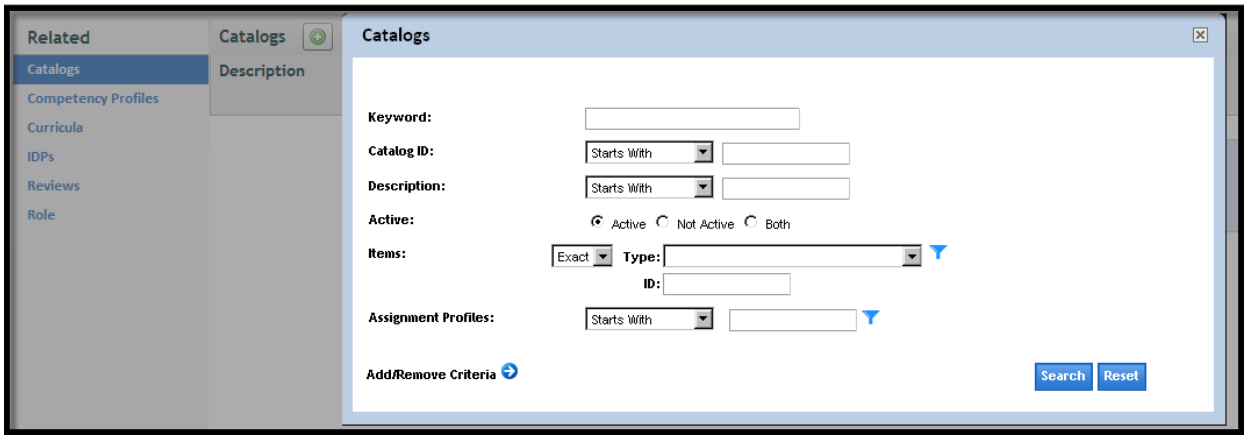


I. After adding your rule(s) add a Domain by clicking on the Domain of the Learner Pool link. Search and Select a domain and click on the Save icon.

Associate the catalog that is going to be assigned by clicking on the Catalog Link under the Related tab and clicking on the Add/Associate Catalogs Icon .



J. Search and Select a catalog.

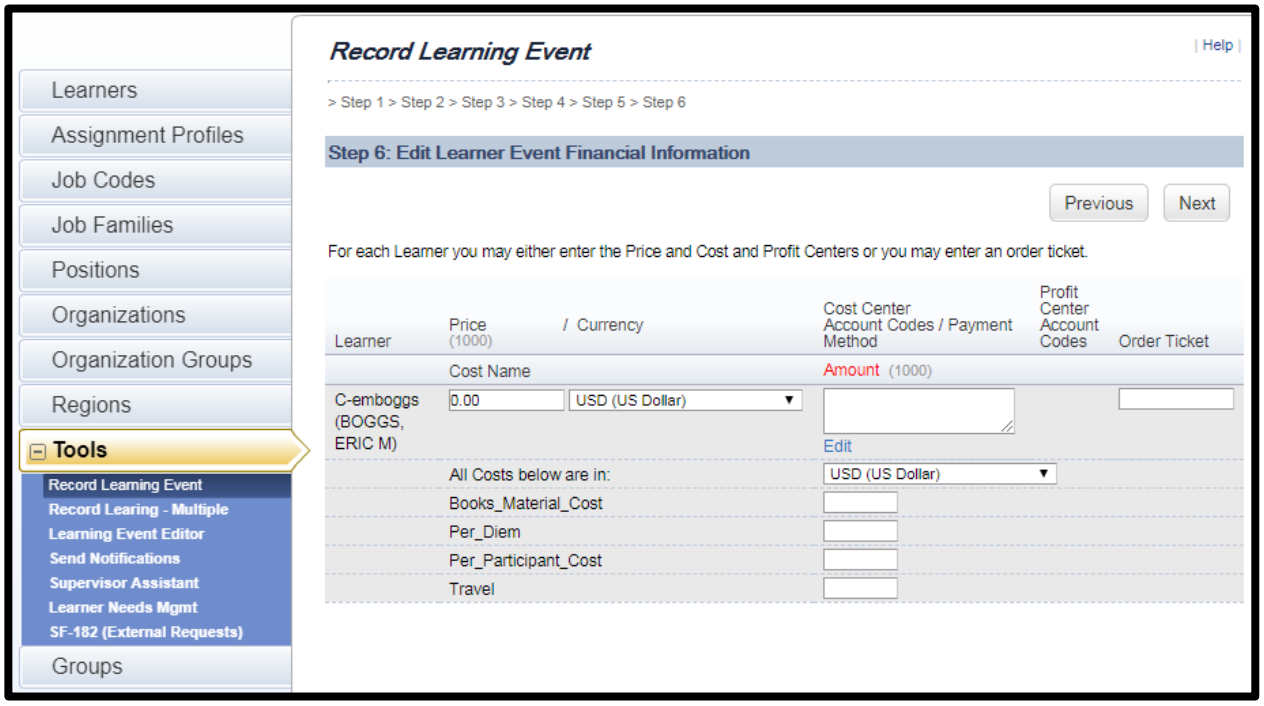


N. Verify the Assignment Profile accuracy

If the job loaded successfully, then the AP main window will display a status of Valid Last Propagated <<timestamp>> in the Assignment Rules Summary section. An Admin can also verify the accuracy of the Assignment Profile by browsing thru the Learner Profiles for the selected catalog previews.

Learners Recording their own Learning

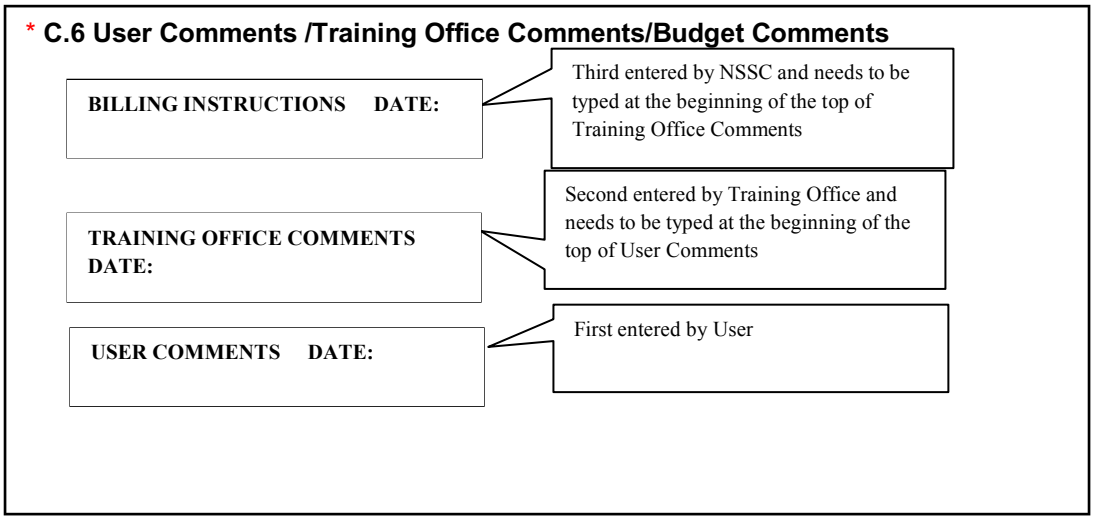
Guidance: Any Item that is self-paced or outside SATERN that the Center wants to place in the Catalog can be made available to Learners to record to their Learning History after completion. Examples would include On-the-Job Training (OJT), reading a book or document, or watching a video. To enable the ability for Learners to record their own learning, Administrators should be sure that Item is in a Catalog and then check the box “Learners can record Learning Events for themselves.”



External Training

Completing the Comments Box: The 182 Form does not have boxes for the Learner Comments or the Training Office Comments. It was recommended that Box C6 on the SF-182 label be changed to “User Comments/Training Office Comments/Billing Instructions” thus creating a multi-use comments box in 6.4.

> **Rule**: Learners, 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 Learner: The SF-182 Form does not have an automatic Notification capability to send a notice to the Learner, Supervisor or Training Office when a SATERN Administrator withdraws a Learner's SF-182 request.

> **Rule**: The Administrator who withdraws the Learner should send a note to the Learner, the Supervisor and the Training Coordinator advising them of the action and the reason.

Record Learning Event – External Event

Situation: Functionality is available for Administrators which does not allow SATERN to record the e-hri data fields required for the OPM data extract.

> **Rule**: Recording of External Events shall never be recorded through the Record Learning Event Process. Record Learning Events process shall only be used to record the completion of Items and Scheduled Offerings.

Manage Alternate Supervisors

Situation: There is new functionality in version 6.4 of SATERN called Manage Alternate Supervisors. This functionality allows an Admin to associate an alternate supervisor for an employee for the approval process. This functionality was included in version 1411 and has not changed for version 1608.

SCHEDULING

Scheduling management is the process of creating Scheduled Offerings for Instructor-led Items or Activities. The person responsible for these actions is the Administrator who initiates the registrations (e.g., NSSC or Center/Discipline Administrators).

Learner No Show

Situation: There will be instances where a Learner does not show up for training. The Administrator needs to indicate this in SATERN since SATERN cannot know if the Learner attended the training.

> **Rule**: If a Learner does not show up for training, Administrators shall change the Learner's registration status from ENROLL to NO SHOW.

Change the Learner's registration status on the Registration tab of the Scheduled Offering prior to recording the Learning Event. This takes the Learner off the roster for the Scheduled Offering and does not record a training completion to the Learner's history.

Delay Start

Situation: Course duration is written to history based on the Segment time that is entered. For a full, eight-hour day, if Administrators do not exclude the lunch break, the break will be included in official course time recorded to the Learner's history.

> **Rule**: When scheduling an eight-hour day, enter two four-hour blocks/Segments with a half-hour or hour time block for lunch so that only 8 hours is recorded. This is time block is referred to as a "Delay Start."

Resolve Resource Conflicts Outside the System

Situation: Error messages prevent conflicts in the system and assist the work of the Administrator, but SATERN does not have the functionality to resolve the conflict within the system. Since Centers use differing methods for scheduling resources Agency guidance is required.

> **Rule**: While SATERN will provide an error message if Instructors or locations are double-booked, Administrators shall ensure the availability of resources outside the system prior to scheduling them in SATERN.

Inactivating Scheduled Offerings

Situation: When Administrators look for active Scheduled Offerings in SATERN, they have to also search through Scheduled Offerings whose date has passed and are still active. As a result, it is difficult to get a clean list of those offerings that are currently active, which is inefficient when an admin is looking for a specific class.

> **Rule**: Once the date of a Scheduled Offering has passed, and all the completion credit has been given to the learners, the SATERN administrators shall set the offering to inactive. To accomplish this, the SATERN administrator should use the regular process to close out the offering and uncheck the active box. The Close the Scheduled Offering button should not be used.

Scheduled Offerings for NASA Safety Training Center (NSTC)

Situation: NSTC Items have been created and placed in the SMA Domain. All NSTC Items have been given an Item ID that begins with SMA-SAFE-NSTC- followed by a number. To prevent duplication of Items and to ensure accurate reporting on completion of NSTC Items, three rules must be followed:

> **Rule**: Center Administrators shall *not* create their own NSTC Items and place them in their Center's Domain.
>
> **Rule**: NSTC Administrators should schedule the NSTC Items that are in the SMA Domain and should place those Scheduled Offerings in the SMA Domain.
>
> **Rule**: Center Administrators shall *not* create schedule offerings for NSTC Items and place them in their Center's Domain.

Situation: To maximize enrollment into NSTC offerings, all NSTC Items and Scheduled Offerings appear in the NASA Catalog. In cases where NSTC offerings enable self-registration, Learners must know the Center at which the offering is taking place when they are viewing the offering in the Catalog.

Rule: NSTC Administrators shall add the Centers prefix to all Center Facility Description fields. This rule is also cited in the business rules for **Other Center Training**.

Situation: The NSTC at Johnson Space Center is responsible for managing the shipment of course materials to all of the Centers. In order to help them gauge the number of materials to reproduce or order and to ship the appropriate number of materials to the Centers, they must have adequate lead time.

Rule for NSTC Administrators Only: When entering a Registration Cut-off Date for an NSTC Scheduled Offering, the registration cut-off date must be at least 30 days from the Start Date of the offering.

SATERN Rosters for Verification

Situation: A SATERN roster includes the printed name of the employees registered and provides a place for their signature. This form allows Administrators to clearly see who is registered and who did or did not sign in for the class. Therefore the following business rule is recommended:

Rule: For Scheduled Offerings in SATERN, the Center Training Office should use only **SATERN** rosters for sign-in and attendance verification, and should send only SATERN generated rosters to the NSSC for course close-out process. The NSSC shall only accept **SATERN** rosters.

Updating the Enrollment Status for Walk-ins

Situation: In version 5.5 of SATERN, employees who were not registered for a Scheduled Offering but showed up for a Scheduled Offering were allowed to sit in the offering as long as there was space available. An administrator would then enroll the employee in the Scheduled Offering prior to close out with a registration status of "Enrolled," which did not reflect the true enrollment status. Centers could not report on the number of Walk-Ins for a Scheduled Offering.

Rule: Prior to closing out a Scheduled Offering, all walk-ins who completed the offering must be added to the roster with an enrollment status of "WALK-IN (Enrolled)." When faxing the Form 27 to the NSSC, indicate the walk-ins on the form.

LEARNING MANAGEMENT

Learning Management refers to the creation of content and courses in the system. In the past, Centers could use some fields to capture Center-only information. It is important to reiterate that the implementation of SATERN is at the Agency-level and thus all Centers must enter information the same way.

Domain Location for Items

Situation: With regard to adding Items to SATERN, an Administrator will not know

Rule: Agency Discipline Items will be placed in the Discipline Domain and then added to a Catalog when appropriate. When a Center creates or owns Center-specific training Items, those Items will be placed in the Center Domain, regardless of their relationship to Discipline Subject Areas.

whether to place the Item in the Center Domain, the NASA Domain, or in the Discipline Domain.

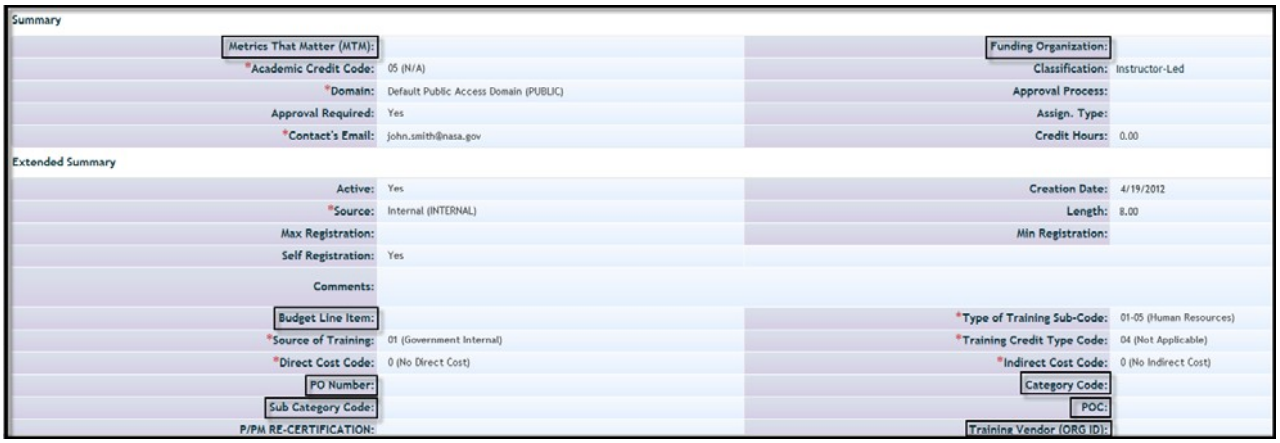
Custom Columns Data Entry

Background: NASA will use Custom Columns, also referred to as Custom Fields, to capture NASA-specific information that would not otherwise be possible if the SATERN software were implemented out of the box.

Filling in the Custom Columns is mandatory. There are 15 custom columns required by OPM and NASA to satisfy specific reporting requirements. The following custom fields are required for NASA use and vary by Center:

- Type of Training Sub-Code
- Source of Training
- Academic Credit Code
- Training Credit Type Code
- Direct Cost Code
- Indirect Cost Code
- Metrics that Matter
- Training Vendor (ORG ID)Training Vendor (Org ID) - for Instructor-Led Courses

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



Summary			
Metrics That Matter (MTM):		Funding Organization:	
*Academic Credit Code:	05 (N/A)	Classification:	Instructor-Led
*Domain:	Default Public Access Domain (PUBLIC)	Approval Process:	
Approval Required:	Yes	Assign. Type:	
*Contact's Email:	john.smith@nasa.gov	Credit Hours:	0.00
Extended Summary			
Active:	Yes	Creation Date:	4/19/2012
*Source:	Internal (INTERNAL)	Length:	8.00
Max Registration:		Min Registration:	
Self Registration:	Yes		
Comments:			
Budget Line Item:		*Type of Training Sub-Code:	01-05 (Human Resources)
*Source of Training:	01 (Government Internal)	*Training Credit Type Code:	04 (Not Applicable)
*Direct Cost Code:	0 (No Direct Cost)	*Indirect Cost Code:	0 (No Indirect Cost)
PO Number:		Category Code:	
Sub Category Code:		POC:	
P/PM RE-CERTIFICATION:		Training Vendor (ORG ID):	

Situation: With regard to filling in the mandatory custom field information, Administrators have two places where they can fill in this information: at the Item-level or at the Scheduled Offering level. Filling in the information at both levels is required to support regulatory reporting requirements.

> **Rule**: The custom columns are mandatory fields and must be filled in at the Item level. Therefore, Administrators shall:
>
> - Enter the custom column information at the Item level for all Items.
> - Enter the Scheduled Offering custom columns information for all custom columns for all Scheduled Offerings.

SOURCE ID Field

Situation: Reporting on external or internal training activity is enhanced by using the SOURCE ID field in the Item Record.

The definitions for INTERNAL and EXTERNAL follow:

INTERNAL – On-site training coordinated by the Training Organization or Discipline for multiple employees, which may or may not include any cost. All NASA-sponsored web-based training (e.g., SkillSoft) is considered INTERNAL.

EXTERNAL – Off-site training – External Training provided to individuals or groups such as conferences, seminars, academic classes, etc. Usually requires the submission of a SF-182 via SATERN for approval and processing.

SKILLSOFT – Skillsoft courses that are included as part of the NASA on-line course offerings will be given a source identification of SKILLSOFT.

> **Rule**: Select INTERNAL for on-site training and EXTERNAL as the SOURCE ID for all off-site/external training. All online Skillsoft courses shall be given a SOURCE ID of SKILLSOFT.

Agency-wide Courses

Situation: Assigning courses to Learner's Learning Plans is a functionality within SATERN. The current Agency policy on assigning Agency-wide mandatory courses on the Learner's Learning Plan is for the NSSC SATERN Admin Support team to setup the curricula and assignment profiles, test them and implement them.

> **Rule**: The NSSC SATERN Administrator Support team is responsible for assigning mandatory Agency-wide training within SATERN. NSSC SATERN Admin Support shall assign approved federally mandated training by adding the course to the learning plans of the impacted audiences by assigning via curriculum/assignment profile. When mandatory training, limited to selected audiences (i.e., not Agency- wide) is required, Disciplines will have the ability to push courses to that audience without the prior approval of the Training Offices.
>
> **Rule**: If the course is Federally Mandated, Training Office Administrators shall assign mandatory training to the required audiences at their Centers, unless the training is already handled by a Discipline, or the NSSC and SATERN vendor (e.g., GP) if the target audience cannot be identified in SATERN. This shall be done by setting up a curriculum and adding the curriculum to the learner's plan.

Course Substitutions

Situation: SATERN allows Administrators to give credit for courses when an equivalent external course has been successfully completed and allows Administrators to create Substitute relationships with existing courses thereby granting credit for both courses to Learners. Since SATERN provides Agency-level reporting for Agency-wide courses, guidance is needed to ensure that the reports are accurate. In the past, Centers were not required to notify course owners when they allowed their Center's course to provide Substitute credit for an Agency-wide course.

> **Rule**: Administrators must request approval for any desired substitutions with the course owner. The Course Owner is 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, they will know whom in the Discipline leadership to take the request.)
>
> **Rule**: 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 Event Information" with the appropriate equivalent course information (i.e., course name, vendor, date, etc.).
>
> It is important to note that Learners will receive two items written to history with a Substitute, so Reporters will have to learn how to run reports in a way that enables them to receive an accurate count.

Program/Project Managers Certification

Situation: NASA's Academy of Program/Project and Engineering Leadership (APPEL) has established processes to document the certification status of each certified P/PM and to track participation of continuous learning activities necessary for recertification through SATERN. Certified NASA P/PMs will have a designation in their SATERN Learning History which reflects their certification status including the date certified. Therefore, SATERN tracks P/PM Certification continuous learning activities.

> **Rule**: The recording of the "FEDERAL ACQUISITION CERTIFICATION FOR PROGRAM/PROJECT MANAGERS-SENIOR/EXPERT (FAC-P/PM-SR/EX)" or the "FEDERAL ACQUISITION CERTIFICATION FOR PROGRAM/PROJECT MANAGERS-SENIOR/EXPERT - PHASE B" Item in SATERN shall be done by the APPEL SATERN Administrator only.

Other SATERN Administrators should not utilize the "FEDERAL ACQUISITION CERTIFICATION FOR PROGRAM/PROJECT MANAGERS-SENIOR/EXPERT (FAC-P/PM-SR/EX)" or the "FEDERAL ACQUISITION CERTIFICATION FOR PROGRAM/PROJECT MANAGERS-SENIOR/EXPERT - PHASE B" Item located within

the NASA Domain.

Rule: Once a Center's or Discipline's course has been reviewed and designated by APPEL as applicable to P/PM Re-certification, SATERN Administrators shall

- Indicate that it is P/PM Re-certification applicable by selecting "Y" in the P/PM Re-certification custom field in the Item and add P/PM Re-certification subject area.
- Ensure that the CPE field is populated with the designated number of CPE hours.
- Ensure that the Item has been added to the P/PM Re-certification Catalog.

- Use of the "P/PM Re-certification Self-Recordable Activities" child-level subject area should be restricted to the APPEL SAL only. If a Center or Discipline has a need to utilize this child-level subject area, they should contact the APPEL SAL.

Evaluations

The SATERN Standard Agency Level 1 Evaluation for Instructor-led and online learning evaluates the Learners' 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.

Situation: 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.

Rule:

- SATERN Administrators should use the SATERN Level 1 Agency standard evaluation for applicable internal training (Instructor -led and online learning).
- SATERN Administrators should not set a Level 1 survey as required for Item completion.

Creating a Customized Level 1 Evaluation

Situation: There is a need for Centers to capture and measure specific data from either an Instructor-led or online learning course beyond what is captured in the

Rule: Customization of the Standard Agency Level 1 Evaluation is permitted only under the following conditions:

- The Standard Agency Level 1 Evaluation cannot be modified/changed/altered.
- Additional Center specific questions must be added on a separate page at the end of the evaluation.
- The final customized Center specific evaluation shall be published to the Center Domain, and not the NASA Domain.
- Follow existing guidance on name convention.

Standard Agency Level 1 Evaluation.

SATERN Agency Leadership Programs Evaluation

Situation: Due to the discontinuation of Metrics That Matter (MTM) evaluations, there is a need for Agency Leadership Programs (e.g., NASA FIRST, MLLP) to use a simplified Level 1 Evaluation for their individual Module training sessions.

> **Rule**: SATERN Administrators should use the SATERN Agency Leadership Programs Module Standard Evaluation (AG-LEAD-STD-EVAL, Agency Leadership Program Module Standard Evaluation or Std NASA FIRST Pgm Eval, Standard NASA FIRST Program Evaluations) for individual training sessions. The Standard Agency Level 1 Evaluation will be applied to evaluate the overall Leadership Program at the conclusion of the program. Questions that are unique to the Module training session (e.g., instructor names, Center Tour) can be added on a separate page at the end of the evaluation. In addition, the person requesting the revised version should specify to the NSSC to include the difference in the ID at the end of the coding structure (e.g., AG-LEAD-STD-EVAL-MLLP-2013, Agency Leadership Programs Module Standard Evaluation – MLLP 2013).

Use of the SF-182 for Conferences

Situation: Originally, a NASA Interim Directive (NID 9312.1) from NASA's Office of the Chief Financial Officer (OCFO) on conference tracking indicated the requirement that for any NASA-sponsored or foreign conference, the Conference code and name be preceded by CONF, Conference Number, and Conference Name in the title field of the external training request. Non-NASA domestic conferences only need to be preceded by CONF NONNCTS. Although this rule is no longer enforced in the most recent version of the NID (9312.3), the SATERN Operations Working Group agreed to continue following this coding structure for Center reporting purposes.

> **Rule**: For any NASA-sponsored or foreign conference, Field B.2.a of the SF-182 External Training Request shall be used to record the Conference Code and Name from the NASA Conference Tracking System (NCTS) located at http://ncts.nasa.gov/ncts/user/index.jsp. Non-NASA domestic conferences only need to be preceded by CONF.
>
> The first characters in the title field must be "CONF" followed by the Conference Identifier (code/name) from the NCTS (e.g., CONF12931-10-ST 61st International Astronautical Congress (IAC)). It is the Center Training Office responsibility to ensure that the correct data is entered in this field prior to approval and forwarding of the SF-182 to the NSSC for processing.

COMMERCE

NASA has decided not to use the Commerce functionality available in SATERN. However, NASA will utilize the Catalogs functionality contained in the Commerce section of the Administrator User Interface. Catalogs are mentioned frequently throughout this document but with regard to the Commerce section of SATERN, there are no Business Rules currently defined.

CATALOGS

A Catalog is used to make Items and Curriculums that are not part of a Learning Plan viewable to Learners. Access to one or more Catalogs is based on attributes in an Assignment Profile.

Situation: An Item or Curriculum may reside in more than one Catalog. In order for a Learner 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 Learner has access.

> **Rule**: 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., 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).

Removing Inactivated Items from Catalogs

Situation: Learners should not be able to add inactivated items to their learner learning plans. To prevent that situation, any item being inactivated should be removed from all catalogs to ensure they are not viewable.

> **Rule**: When Administrators inactivate an item in SATERN, the item must be removed from all SATERN catalogs to ensure that the item is not searchable.

RESOURCE MANAGEMENT

Resources are the objects, places, and people needed to provide training in an Instructor-led environment.

Working with Instructors

Situation: Instructors will not have access to the system. Therefore, it is important that Administrators know to work closely with Instructors.

> **Rule**: Since Instructors do not have access to the system, it is the responsibility of the Training Office Administrator to provide Instructors with the information they need. (If necessary, Administrators can send e-mail Notifications to Instructors, copy them on rosters as Learners are registered, and provide other details.)

Domain for Instructors

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 an Instructor follows:

Create Regions for each Center: ARC, DFRC, GRC, GSFC, GSFC-GISS, GSFC-IVV,

GSFC-WFF, HQ, HQ-JPL, JSC, JSC-WSTF, KSC, LARC, MSFC, MSFC-MAF, and NSSC-SSC.

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.

Rule: Create Instructor IDs using the naming convention of **I-** (eye dash), first initial, middle initial, last name to identify Instructor IDs versus 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 this Instructor is expected to teach at (home Center or Center of record should be selected as the primary to aid in identifying similarly named Instructors from different locations).

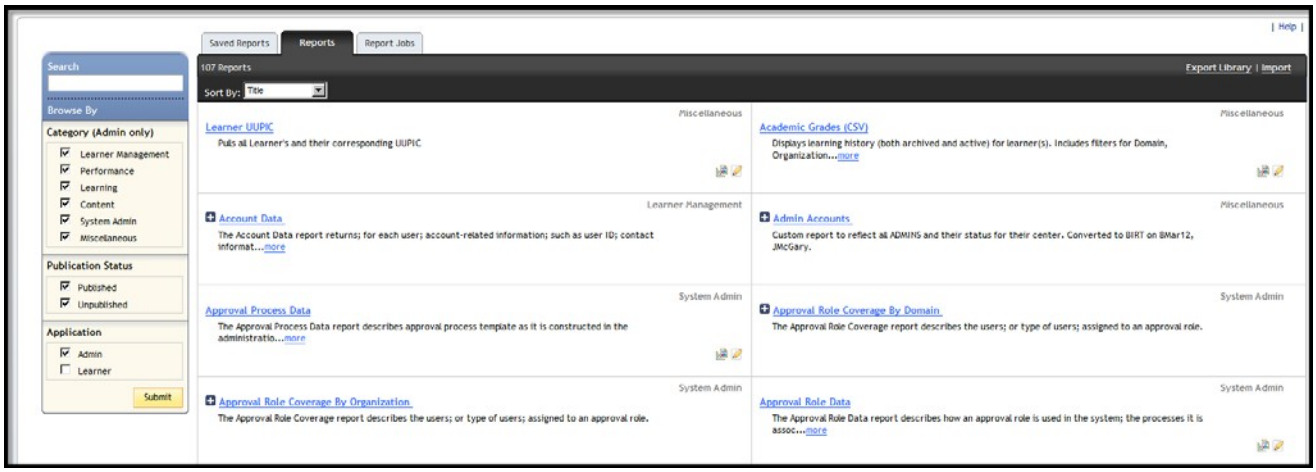
Note: Before creating an Instructor Record, check and make sure that Instructor does not already have an account in SATERN. If the account already exists, you should modify the assigned regions to include the new region/Center location and provide the Instructor record ID to the original add Instructor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

REFERENCES

There are no Business Rules currently defined for the References section of SATERN.

REPORTS

The Reports section of SATERN is shown below. Standard SATERN reporting functionality addresses many general, NASA-internal and management-related reporting needs. The left navigation displays the standard reports that are available grouped by category.



Situation: While the standard reports available in SATERN do provide for excellent and easy-to-use reporting on a variety of areas, the standard reports do not include the NASA custom column data and are therefore inadequate as a replacement for NASA current reporting capability.

Agency Process: To address identified Center reporting needs not covered by the standard reports available in SATERN, pre-defined custom reports (defined as reports that have been custom developed and are ready for use) will be available. For reporting needs beyond these, Administrators may invoke the exception process whereby custom reports can be developed as needed according to the Change Control Request (CCR) process located on the SATERN Information site (https://satern.nasa.gov /Organization_Project_team.html), which should only be submitted by Center or Discipline SALs.

Rule: Administrators will use the SATERN Report Process diagrammed on the following page:

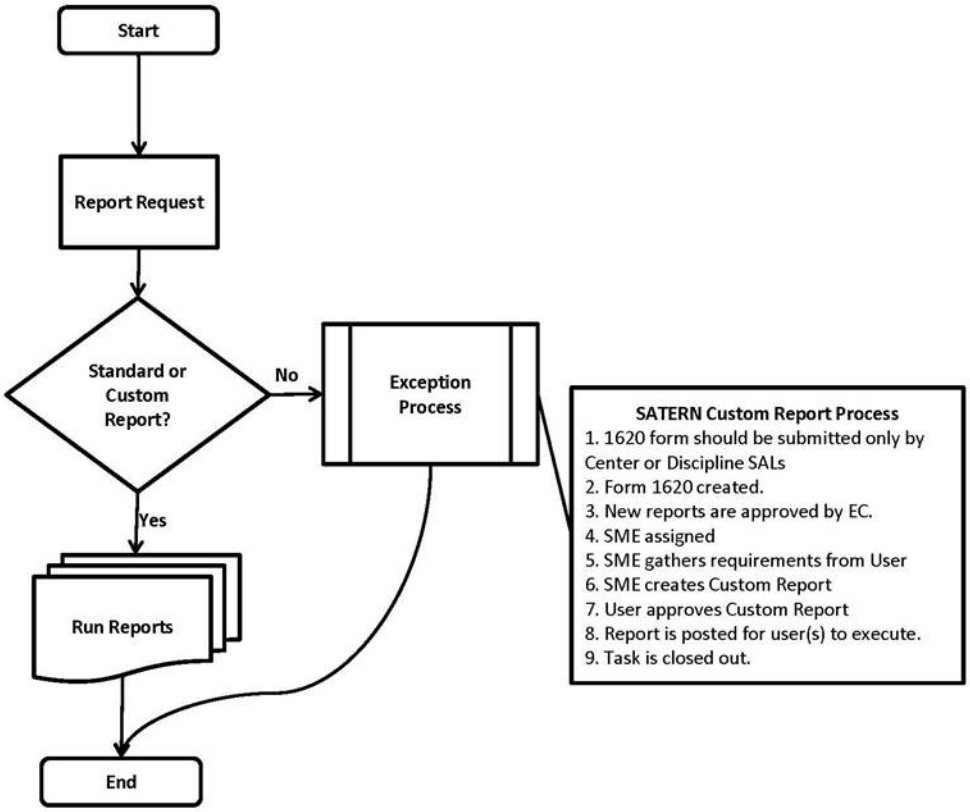


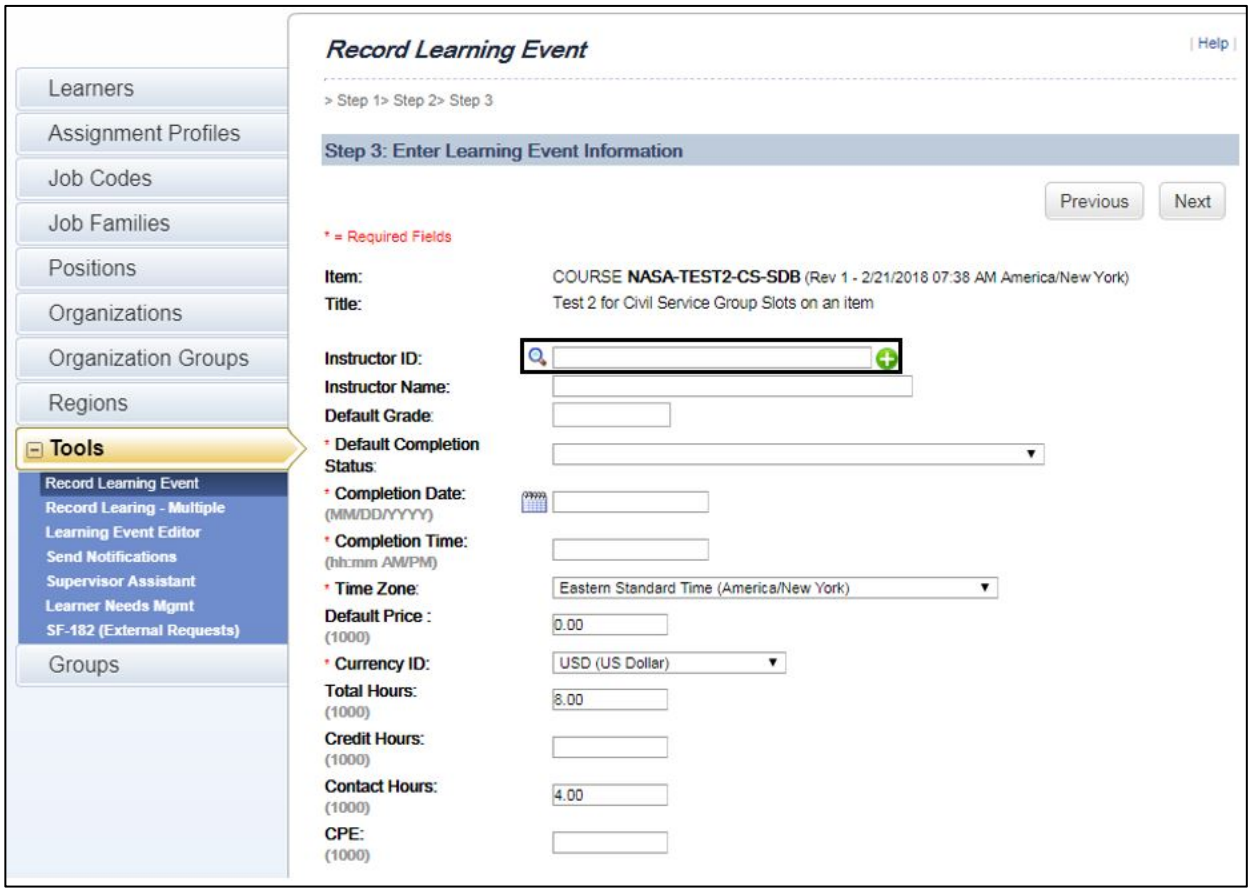
Chart 1: SATERN Agency Report Process

Since custom reporting can be achieved in SATERN and there are developers as part of the SATERN Technical Team, custom report creation is available to NASA to meet its current and future reporting needs. The SATERN Technical Team will use an external reporting tool in most cases to develop the reports.

Item Evaluation by Instructor Report

Situation: During version 6.4 upgrade testing, it was discovered that the “Item Evaluation by Instructor” yielded no results even though an instructor was identified in the scheduled offering. In addition, Instructor data from the scheduled offering is not written to training history or carried over to the “Instructor Field” in the “Record Learning Event” process. Success Factors reported that this was expected functionality of the LMS. In order for the “Item Evaluation by Instructor” report to yield any results, the administrator recording the learning event must select a primary instructor in step 3 of the “Record Learning Event” process.

> **Rule**: If the Centers or Disciplines want to use the “Item Evaluation by Instructor” report, they must select an instructor in step 3 of the “Record Learning Event” process.



TOOLS

There are no Business Rules currently defined for the Tools section of SATERN.

SYSTEM ADMINISTRATION

Approval Role Management

To enable self-registration in SATERN, Administrators update the approver’s account (except Supervisor role) with the appropriate Approval Role(s) based on the

corresponding steps in an Approval Process. An Approval Process can be assigned to any Item or Scheduled Offering so that Learners can self-register for a course that automatically initiates the approval process to obtain the approvals necessary to attend the course.

Administrators can identify all the potential Approvers who have a specific role. This will cause each potential Approver with that Role to receive an email when that step in the Approval Process is reached. However, receiving emails for registration requests for courses that the approver does not manage not only causes confusion but can be annoying.

To enable Administrators at the Centers the flexibility of identifying the specific Approver(s) that handle a specific course or type of course, the Approval Roles shown below were created. Now Center Training Offices can use 21 unique Training Office Specialist Roles for their staff, effectively eliminating approval requests that are not intended for them. The new Approval Roles are shown below:

Approval Role ID	Description
TO-1	Training Office Specialist 1
TO-10	Training Office Specialist 10
TO-11	Training Office Specialist 11
TO-12	Training Office Specialist 12
TO-13	Training Office Specialist 13
TO-14	Training Office Specialist 14
TO-15	Training Office Specialist 15
TO-16	Training Office Specialist 16
TO-17	Training Office Specialist 17
TO-18	Training Office Specialist 18
TO-19	Training Office Specialist 19
TO-2	Training Office Specialist 2
TO-20	Training Office Specialist 20
TO-21	Training Office Specialist 21
TO-3	Training Office Specialist 3
TO-4	Training Office Specialist 4
TO-5	Training Office Specialist 5
TO-6	Training Office Specialist 6
TO-7	Training Office Specialist 7
TO-8	Training Office Specialist 8
TO-9	Training Office Specialist 9

As an example, if a Center uses the two-step Approval Process: Step (1) Supervisor and Step (2) Training Office Specialist. When the Learner self-registers for an Item or Scheduled Offering, an email is sent to anyone with that Learner's Domain Restriction and the role of Training Office Specialist. Using the above listed Approval Roles allows you to specify the person(s) (up to 21) that should be approving enrollments for that particular Item or Scheduled Offering.

Remember that using these Approval Roles will only work if you select the Approval Process that contains the desired Approval Role that you have pre-populated. Also note that in addition to these new Approval Processes available to you, the previously defined Approval Processes are still available for use at your Center. The new Approval Processes are shown in the screenshot below.

References

Process ID ▲	Process Name
1 STEP TC	1 STEP TC
1STEP SUPER	1STEP SUPER
1STEP_IEM	1STEP_IEM
1STEP_LC	1STEP_LC
2 STEP SUPER/CFO APPROVAL	2 STEP SUPER/CFO APPROVAL
2 STEP SUPER/CFO1 APPROVAL	2 STEP SUPER/CFO1 APPROVAL
2STEP SUPER/ARC NSTC POC	2STEP SUPER/ARC NSTC POC
2STEP SUPER/DFRC NSTC POC	2STEP SUPER/DFRC NSTC POC
2STEP SUPER/GRC NSTC POC	2STEP SUPER/GRC NSTC POC
2STEP SUPER/GSFC NSTC POC	2STEP SUPER/GSFC NSTC POC
2STEP SUPER/HCTO	2STEP SUPER/HCTO
2STEP SUPER/HQ NSTC POC	2STEP SUPER/HQ NSTC POC
2STEP SUPER/JSC CFO	2STEP SUPER/JSC CFO
2STEP SUPER/JSC NSTC POC	2STEP SUPER/JSC NSTC POC
2STEP SUPER/KSC NSTC POC	2STEP SUPER/KSC NSTC POC

Caution: Administrators that wish to utilize these Approval Roles and corresponding Approval Processes should closely monitor the Approval Role Number assigned to each Training Office member to ensure that the correct Approval Process is used. Confusion and delay for Learners could result if a mistake occurs.

Note: If your Center would like to utilize Approval Processes that are not currently defined in SATERN, the Center or Discipline SAL must call the Help Desk at 1-877-NSSC-123 to have those configured and created for use. For example, if you have an Approval Process that incorporates two Approval Roles that are currently defined in SATERN but aren't in a sequence that is currently defined in SATERN, the Help Desk can create an Approval Process that will meet your business need. Keep in mind that Approval Roles and Approval Processes are available across the Agency, so be sure to check and see if the current configuration meets your needs prior to calling the Help Desk.

Super-approval of Training Requests

Situation: Often Learners are not receiving approval for Scheduled Offerings and/or external training in a timely manner due to the unavailability of Supervisors to approve the training.

Rule:

- If a Learner's Supervisor is unavailable to approve the Scheduled Offering and/or external training request in a timely manner, the Center Level 1 Administrator can approve the training with a written authorization (e-mail) from the Learner's Supervisor to approve the training for the Learner.
- The Administrator should use the comments field to include remarks that reflect that the approval was made by the Level 1 Administrator on behalf of the Supervisor. Administrators should not "super-approve" the Training Office step, because Training Codes cannot be entered.

Granting Administrator Access

Situation: All SATERN Center administrator account requests will be submitted through NAMS and approved/fulfilled by the Center SATERN Administrative Lead (SAL). There is a limit of three (3) Level 1 Administrators for each Center and Discipline. (Privacy Act data is no longer stored in SATERN as of 2011, which was the original purpose for this rule. However, it remains a prudent guideline given the range of permissions associated with this level of access.) The Level 1 Administrator is the only role that may create Administrator accounts for other Administrators.

Rule: After the request for SATERN Administrator Access has been approved in the NASA Access Management System (NAMS), Level 1 Administrators may create lower-level Administrator accounts for Administrators at their Centers or within the Discipline but must notify the Center Training Office or the Center PoC of the account that was created. to the NSSC for creation of the new RA-1 account. Note that there is a limit of three (3) Level 1 Administrators for each Center and Discipline.

All LMS Administrator account IDs must match exactly the LMS Learner account ID. Requests for SATERN Admin Access can be made at https://idmax.nasa.gov

When inactivating (locking) any admin account, ensure that the NASA Access Management System (NAMS) access has been deactivated by selecting "close access" for that employee/administrator.

Granting Discipline Administrator Access

Situation: Given Privacy Act constraints and Domain controls in SATERN, only Discipline SALs or the NSSC Admin Support team can create discipline administrator roles. These roles will only be created after the request has been approved through the NASA Access Management System (NAMS).

Rule: After the request for NASA Discipline SATERN Access has been approved in the NASA Access Management System (NAMS), SALs can create Discipline Administrator accounts in SATERN.

All LMS Administrator account IDs must match exactly the LMS Learner account ID. Requests for SATERN Admin Access can be made at https://idmax.nasa.gov

When inactivating (locking) any admin account, ensure that the NASA Access Management System (NAMS) access has been deactivated by selecting "close access" for that employee/administrator.

Process: Anyone requesting full Discipline Administrator Access must make the request in the NASA Access Management System (NAMS) which will be approved by the Discipline SAL. That request can be made at https://idmax.nasa.gov. Once the Discipline SAL verifies and authorizes the account, he or she will create the account in SATERN or request assistance from the NSSC support team.

Rule:

1) Any requests for modification to existing Center/Discipline Administrator- assigned roles and/or the creation of new SATERN Administrator accounts will need to be submitted through the NASA Access Management System (NAMS) at https://idmax.nasa.gov.

2) Center SALs are responsible for setting up new SATERN Administrator accounts in the Production, Staging, and Test environments. Discipline SALs are required to work with the NSSC in setting up new and modifying existing SATERN Administrator accounts for all appropriate environments.

3) **All LMS Administrator account IDs must match exactly the LMS Learner account ID.**

When inactivating (locking) any admin account, ensure that the NASA Access Management System (NAMS) access has been deactivated by selecting "close access" for that employee/administrator.

Rule: **All LMS Administrator account IDs must match exactly the LMS Learner account ID.** Requests for SATERN Admin Access can be made at https://idmax.nasa.gov

Granting Administrative Rights

Situation: It is imperative that the appropriate roles are assigned to the correct Center and Discipline Administrators. Previously, the Center/Discipline SATERN Administrator Leads (SALs) were not always involved in this process. This sometimes required the SAL to modify the account to match the administrator's role within the organization.

Associating Learner ID with Administrator Account

Situation: Currently we have some administrators who have multiple accounts but the system will only allow you to relate one administrator account to a learner account. There is no current guidance on which administrator account should be associated with the learner account.

> **Rule**: When creating a new administrator account, the account shall be related with a learner account. If an administrator has more than one administrator account, the primary administrator account that the administrator uses on a daily basis is the account that shall be related to a leaner account.
>
> **All LMS Administrator account IDs must match exactly the LMS Learner account ID.**

SUPPORT

As the SATERN Administrator community continues to work in SATERN, hold training courses, review business processes, and evaluate the system, there will be situations where a need for a business rule is identified. If you would like a situation considered by the SATERN EC or have functional issues or concerns, please contact your Center or Discipline SAL. SALs are listed on the SATERN Informational Web site (https://satern.nasa.gov /key_contacts.html). SALs may contact the SATERN Agency Operational Support Lead to add their request to the EC agenda.

For technical support, Administrators and Learners may call the SATERN Help Desk at 1-877-NSSC-123 (1-877-677-2123).

Administrators continue to have access to a SATERN training environment for self-paced exercises. The training environment remains valuable because it allows Administrators to identify and analyze changes to their business processes without making changes to the production system. The current SATERN training environments are located at the following Web address for both Learner and Administrator roles: https://nasatrn.gpehosting.com

For access to either of these training environments, any Center Level 1 Administrator can create an account.

Also be sure to check out the SATERN Informational Web site at https://satern.nasa.gov for more information for Learners, Supervisors, and Administrators.

Acknowledgements

The Business Rules Sub-team is grateful to the following individuals for dedicating themselves to ensure that SATERN meets or exceeds NASA requirements: Adolphus Uzoukwu, Alana Cober, Eric Boggs, Gregg Phelps, Gretchen Morris, Howell Carter, Jennifer Sizemore, Kati Brown, Kayce McDaniels, Laura Gramling, Laura Baker, Leslie Doss, Nola Bland, Rhonda Billick, Robert Reid, Shae Simpson and Steven Bliss.

In addition to the Business Rules sub-team, others participated in sub-teams that focused on major issues that affect SATERN including, Evaluations, Reporting, and Individual Development Plan. Thank you for your energy and efforts.

Appendix A: Standard Form 182 (SF-182)

REQUEST, AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING

SECTION A: TRAINEE INFORMATION — Instructions

B. Request Status / Record Action

- (●) Add
- ( ) Delete

A.1. Applicant's Name — First Five Letters of Last Name

Last Name	First Name	Middle Initial	First Five Letters of Last Name
[redacted]	[redacted]	[redacted]	[redacted]

A.4. Work Address — * A.5. Work Phone — * A.6. Position Level

Street Address				A.5. Work Phone	A.6. Position Level
	[redacted]			[redacted]	( ) a. Non-supervisory ( ) b. Manager
City	State / Province	Postal Code	Country		( ) c. Supervisory ( ) d. Executive
Stennis Space Cente	MS	39529-6000	US		

A.7. NASA Conference Tracking System Data, if applicable
Access NCTS @ http://ncts.nasa.gov/ncts/user/index.jsp

A.8. Early Bird Registration, if applicable (MM/DD/YYYY)

* A.9. Work Email Address

NCTS# (start w/N and includes no spaces)

Learner NCTS Approval Date (MM/DD/YYYY)

* A.10. Position Title: SUPV HUMAN RESO

A.11. [APPROVAL REQUIRED] Expedite Processing (Yes/No): ( ) Yes (●) No

Expedite Reason/Justification

A.12. [TRAINING OFFICE] Category	* A.13. Education Level	A.14. Last Day to Register (MM/DD/YYYY)	A.15. [TRAINING OFFICE] Direct Cost Code	* A.16. Grade	A.17. [TRAINING OFFICE] Sub-Category
	17			GS-14	

SF182 Field Details

Section A:

Fields highlighted in RED = To be completed by Learner
Fields highlighted in BLUE = To be completed by Training Office

Block 1: Applicant's Name -Pre-populated Block 4: Work Address
Block 5: Work Phone-Pre-populated Block 6: Position Level-Select one
Block 7: NASA Conference Tracking System (NCTS) Data Collection, if ap plicable. NCTS number can be located @ http://ncts.nasa.gov/ncts/ user/index.jsp. Learner approval will be received in the form of a NCTS generated email. Note typically the NCTS # is the same as the numbers in the front of the course title.
Block 8: Early Bird Deadline - Enter in standard date format of (MM/DD/ YYYY) Providing this deadline allows the Agency to leverage best price.
Block 9: Work E-mail Address-Pre-populated. Block 10: Position Title-Pre-populated.
Block 11: TRAINING OFFICE MUST APPROVE. Expedite Processing (Yes/ No) - System will default to "No". Expedite Reason - Provide succinct justification for expediting request. Suggested reasons are: Registration Deadline, Early Bird Registration, Limited Seating/ Registration Fills Quickly, Deadline to Schedule Travel, or Payment Deadline
Block 12: Category
Block 13: Education Level -Pre-populated
Block 14: Last Day to Register - Provide final day to register for the event Block 15: Direct Cost Code
Block 16: Grade - Pre-populated with Pay Plan/Grade Block 17: Sub-Category

Reconfigured SF182—Section B

SECTION B: TRAINING COURSE DATA — Instructions

B.1a. Name and Mailing Address of Training Vendor

* ID | Name | Other If Other, please specify

* Street Address	* City	* State / Province	* Postal Code	Country

B.1b. Physical Address of Training Event (If Academic, confirm billing location for school, as this can vary depending on selected program of study)

If Same, mark box.

* Street Address	* City	* State / Province	* Postal Code	Country

B.1c. Vendor Email Address	* B.1d. Vendor Phone Number

* B.2a. Course Title	B.2b. Catalog/Course Number	* B.3. Training Start Date (MM/DD/YYYY)	* B.4. Training End Date (MM/DD/YYYY)

* B.5. Training Duty Hours	* B.6. Training Non-Duty Hours	B.7. [TRAINING OFFICE] Purchase Request Type
		-- Please Select One --

B.9. [TRAINING OFFICE] Training Type/Sub Type Code	B.10. [TRAINING OFFICE] Training Delivery Type Code	B.11. Training Designation Type Code	* B.12. Academic Credit Hours (If non-academic enter "0")	B.13. Training Credit Type Code
-- Please Select One --	-- Please Select One --	-- Please Select One --		-- Please Select One --

B.14. [TRAINING OFFICE] Training Accreditation Indicator	B.15. [TRAINING OFFICE] Continued Service Agreement Required Indicator	B.16. Continued Service Agreement Required Expiration Date	B.17. [TRAINING OFFICE] Training Source Type Code
Yes No	Yes No N/A		-- Please Select One --

* B.18. Course Objectives and Justification	B.19. Vendor Registration Website Link

Section B:

SF182 Field Details

Fields highlighted in RED = To be completed by Learner

Fields highlighted in BLUE = To be completed by Training Office

Block 1a: Name and Mailing Address of Training Vendor Search for vendor and click Select if found. Selected vendors will populate the address fields. If vendor is not listed, select Other. Provide details *(e.g., name, mailing address, fax number, country)* of training vendor. Contact the vendor to obtain the information above if it is not provided.
Block 1b: Physical Address of Training Event *(If Academic, confirm billing location for school, as this can vary depending on selected program of study)*- If same as block 1a, check the box.
Block 1c: Vendor E-mail Address Block 1d: Vendor Telephone Number
Block 2a: Course Title-Enter the exact title from the course materials. Spell out acronyms. *(Note: If this is a foreign or NASA-sponsored conference, the title must be prefixed with "CONF" followed by the official conference number and title from the NASA Conference Tracking System, found at http://ncts.nasa.gov).*
Block 2b: Catalog/Course Number-Enter the vendor number/identifier or college/ university number assigned to a course, if available
Block 3: Training Start Date-Indicate date the training will start Block 4: Training End Date-Indicate date the training will end
Block 5: Training Duty Hours-Indicate the number of hours (duty) during which training will occur.
Block 6: Training Non-Duty Hours-Indicate the number of hours (non-duty) during which training will occur.
Block 7: Purchase Request Type-Identify the purchase type for proper routing. (*Select "Purchase"; "Reimbursement", "Project Funded—Mission Funded at Center Level"; "Project Funded—Institutional Funds Transferred to NSSC" No Cost–Registration Required; No Cost-Data Entry Only; "Agency Funded"; or "Ratification")*
Block 9: Training Type/Sub Type Code Block 10: Training Delivery Type Code Block 11: Training Type Code
Block 12: Academic Credit Hours -If non-academic enter "0" Block 13: Training Credit Type Code -select from dropdown Block 14: Training Accreditation Indicator -Yes/No radio button
Block 15: Continued Service Agreement Required Indicator - Yes/No Block 16: Continued Service Agreement Required Expiration Date Block 17: Training Source Type Code - Select from dropdown
Block 18: Course Objectives & Justification Block 19: Vendor Registration Website Link

Reconfigured SF182—Section C

SECTION C: COSTS AND BILLING INFORMATION — Instructions

C.1. Direct Cost and appropriation/fund chargeable

Item	* Amount	Appropriation Fund
a. Tuition	$	
b. Books or Materials	$	
c. Total	$	

C.2. Indirect Cost and appropriation/fund chargeable

Item	* Amount	Appropriation Fund
a. Travel	$	
b. Per Diem	$	
c. Total	$	

C.3. [TRAINING OFFICE] Total Training Non-Government Contribution Cost

$

C.4. [TRAINING OFFICE] Document / Purchase Order / Requisition Number

C.5. [TRAINING OFFICE] WBS Code

* C.6. User Comments/Training Comments/Billing Instructions
Additional Registration Information, Active Membership #, Special Accommodations, Conference Session Selections, Etc.

SF182 Field Details

Section C:

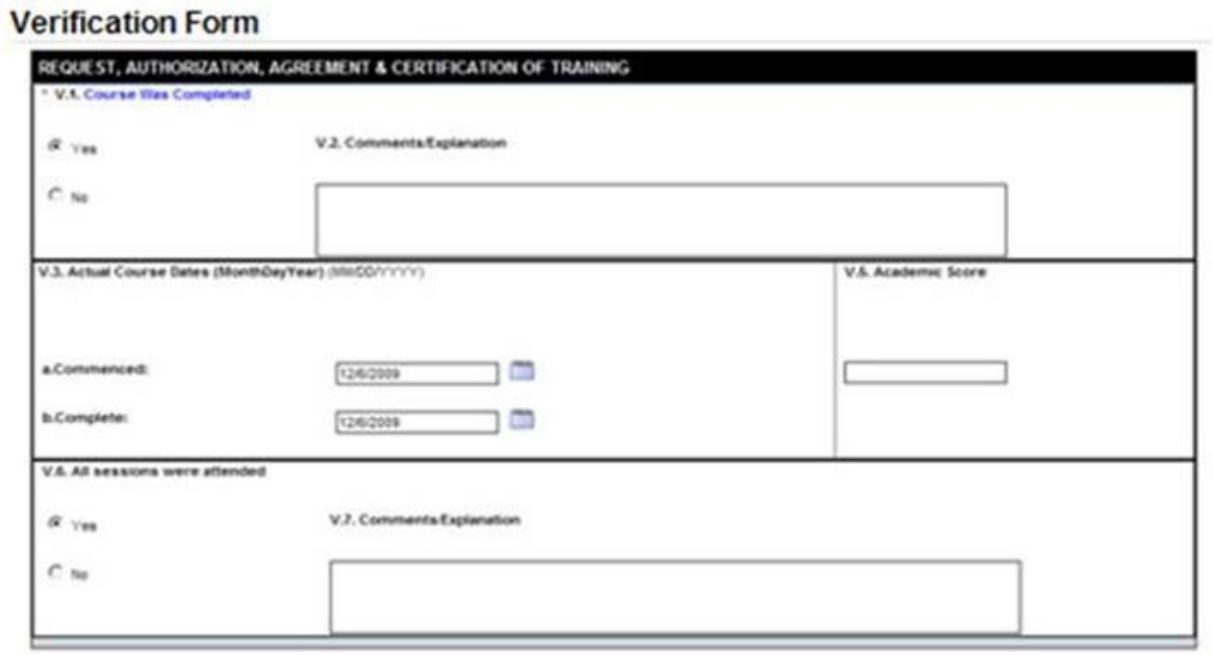
Fields highlighted in RED = To be completed by Learner
Fields highlighted in BLUE = To be completed by Training Office

Block 1: Direct Cost and Appropriation/Fund Chargeable. Enter amount for tuition and books. If no costs, enter "0".
Block 2: Indirect Cost and Appropriation/Fund Chargeable. Indicate all re- lated travel costs. If no costs, enter "0".
Block 3: Total training non-Government contribution cost. Enter costs con- tributed for training by the employee or other non-Government organiza- tions.
Block 4: Document / Purchase Order / Requisition Number Block 5: WBS Code
Block 6: User Comments/Training Comments/Billing Instructions Please provide the following: Additional Registration Information, Active Member- ship#, Special Accommodations, Additional Conference Session Selections, Etc.

To ensure timely processing, please supply a Member number if requesting a member discount and username and password for online registration, as applicable. For conferences, enter the sessions you will attend and links to course registration forms. Indicate if you are using program or project funds if that information is available. CTO should confirm all applicable in- formation is provided before approving the SF 182.

If you choose to provide your username and password, please create a temporary password and provide this information to NSSC. Once you re- ceive the automated SATERN email showing that your training request has been approved, immediately change your password.

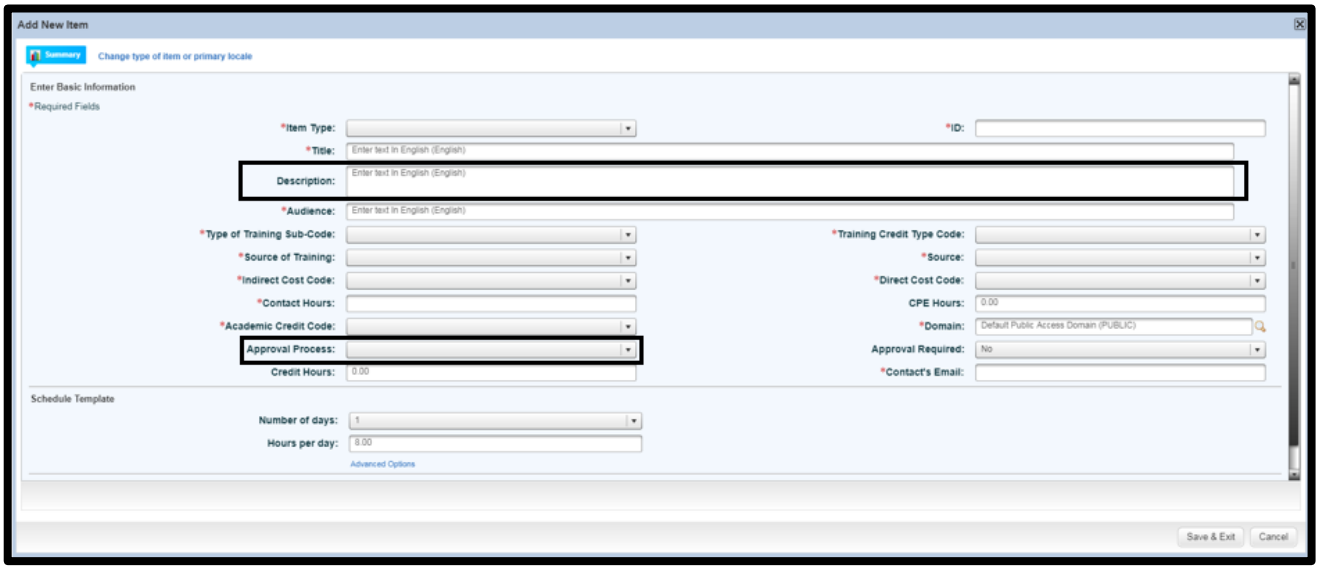
Note: When creating user IDs and passwords, it's strongly recommended that you do not use any of your NASA system related user IDs and pass- words.



Appendix B: SATERN Mandatory Fields

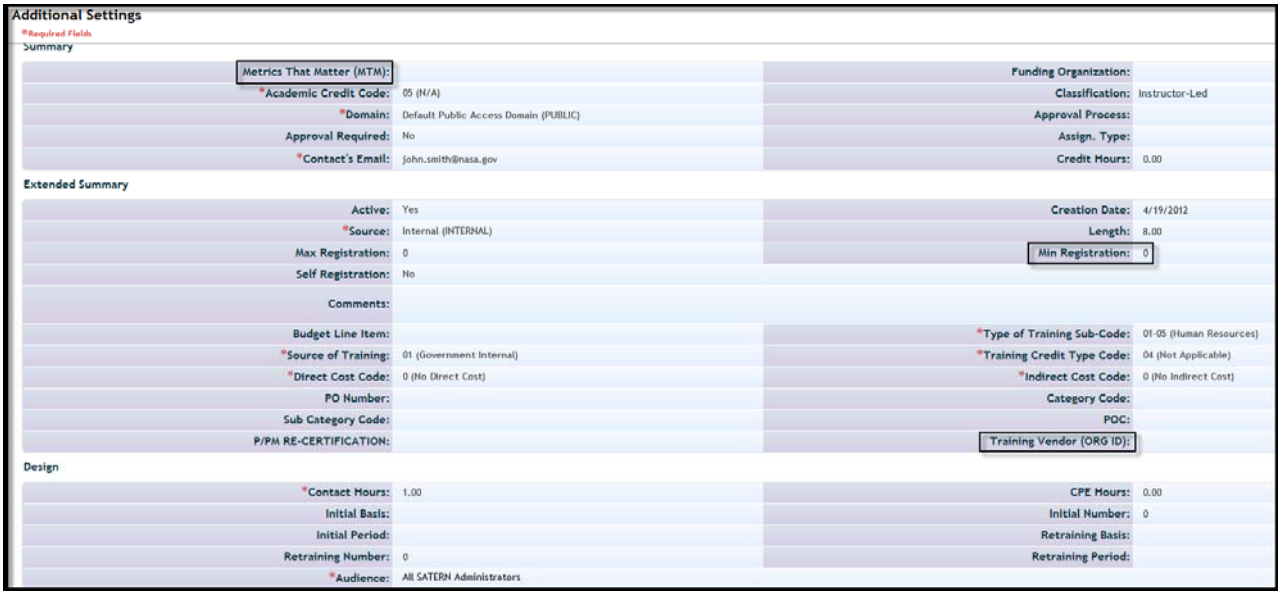
<u>Item Mandatory Fields</u>

- **All field mark with ***
- **Description** (Only for Items that will go into a Catalog)
- **Approval Process ID** (Only if approval is required)



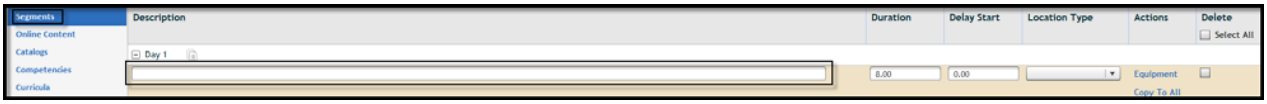
Item Mandatory Fields – Additional Settings

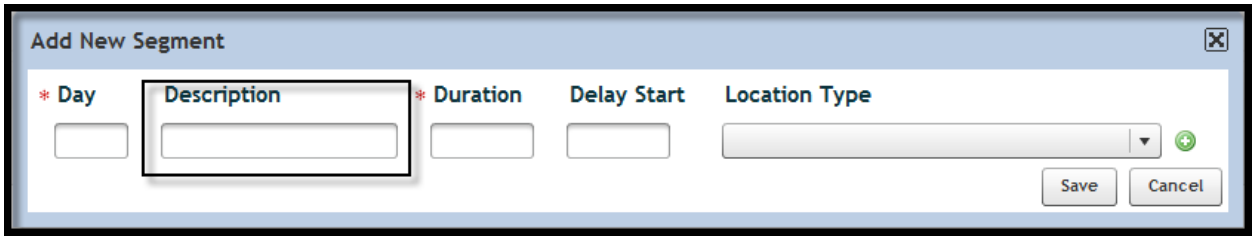
- **All field mark with ***
- **Metrics That Matter**
- **Minimum Registration** (Highly recommended for Item request APM)
- **Training Vendor ID** (Required for ILT Courses – not required for on-line courses but highly recommended)
- **Center Specific** (Refer to your Center guidelines): PO Number, Category, Sub-Category, Funding Organization, POC, Budget Line Item



Item Mandatory Fields- Segments

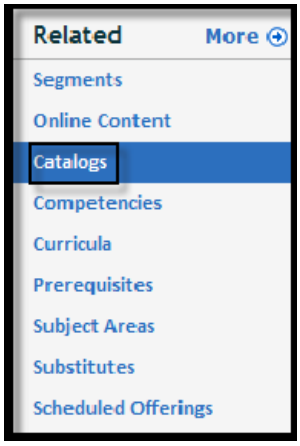
- **All fields marked with an ***
- **Segment Description**





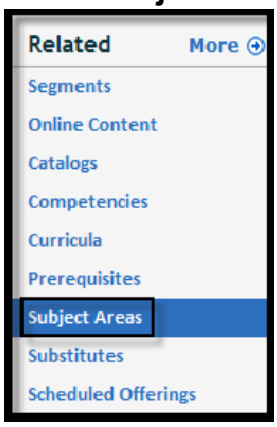
Item Mandatory Fields

- **Catalog** (Only for Items that will go in a catalog)



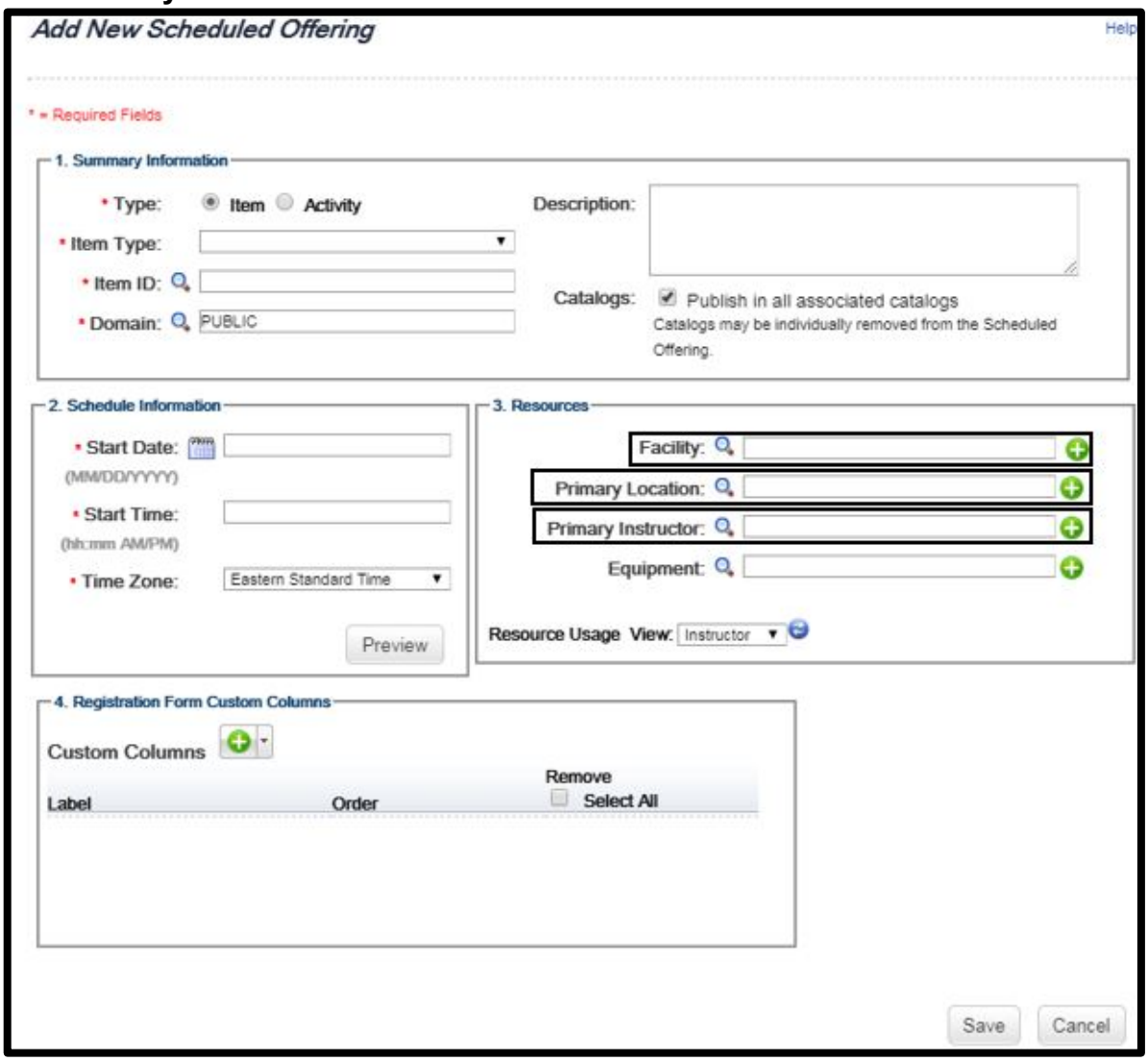
Item Mandatory Fields

- **Subject Areas** (Only or Items that will go in a catalog)



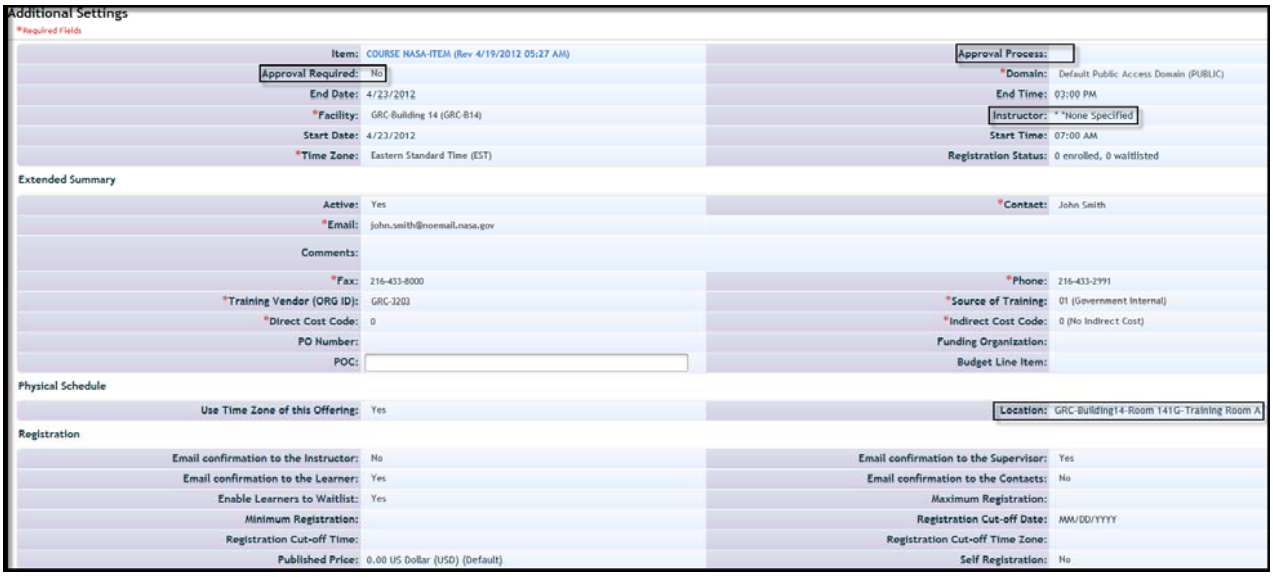
Scheduled Offering Mandatory Fields

- **All fields marked with ***
- **Facility**
- **Primary Location**



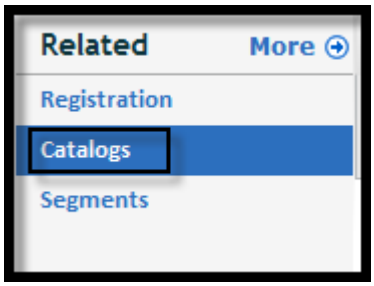
Scheduled Offering Mandatory Fields – Additional Settings

- **All fields marked with ***
- **Approval Required** (Only if Approval Process is populated)
- **Approval Process** (Only if Approval Required is set to Yes)
- **Location** (If not filled in at Add New Scheduled Offering screen): Must be added through Segment>Resources>Add Location
- **Center Specific** (Refer to your Center guidelines): PO Number, Category, Sub-Category, Funding Organization, POC, Budget Line Item)



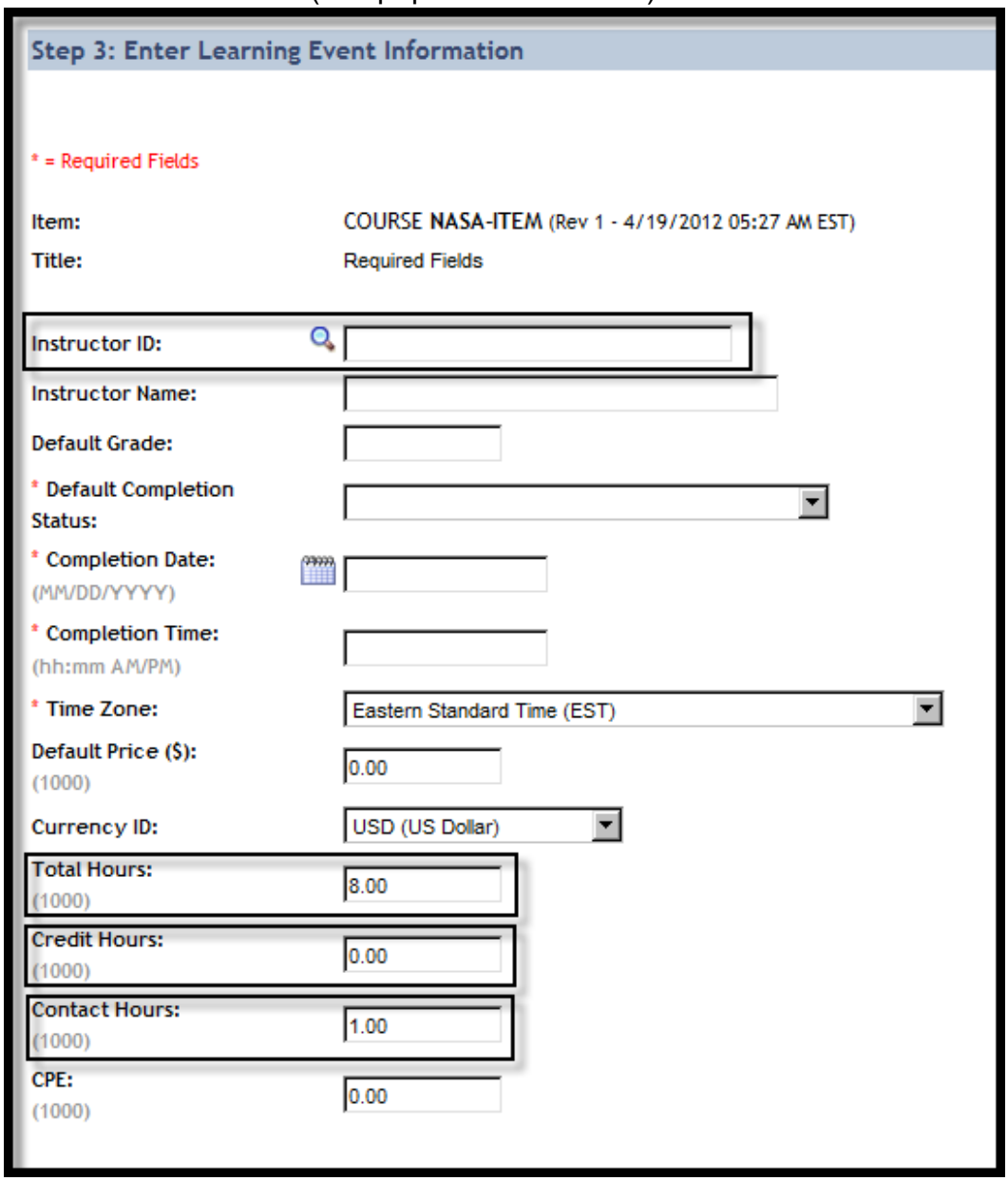
Scheduled Offering Mandatory Fields – Related

- **Catalogs** (Only if Scheduled Offering will go into a catalog)



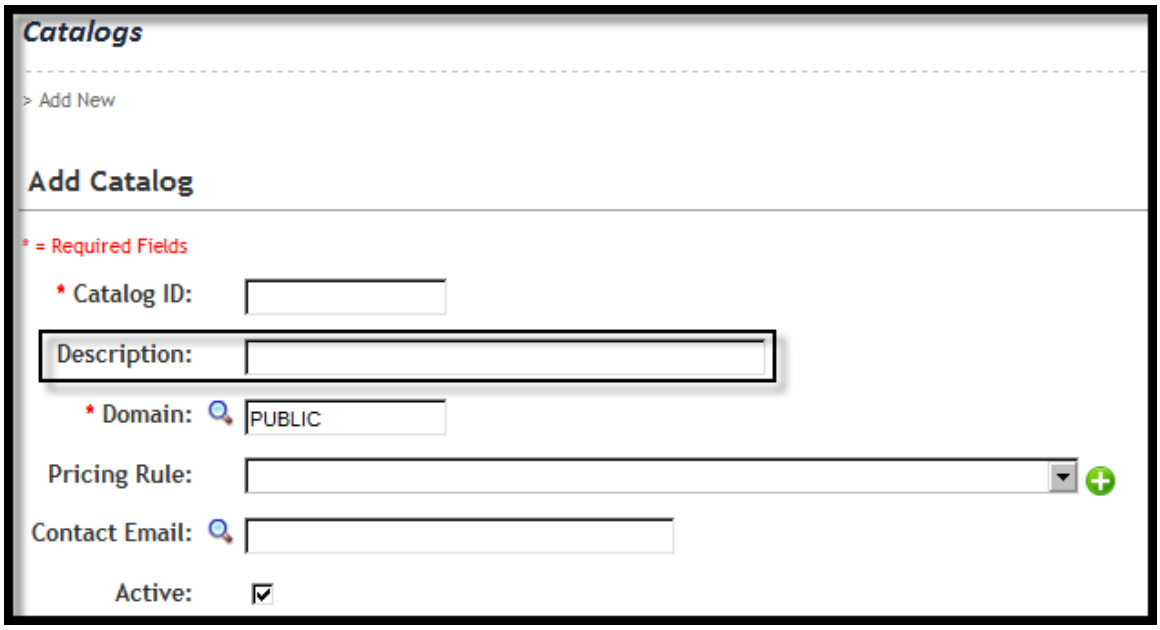
Record Learning Event Mandatory Fields

- **All fields marked with ***
- **Instructor** (Required if you want to run Evaluation by Instructor Report for Items using Standard Agency Evaluations – otherwise highly recommended for Center Mandatory)
- **Total Hours** (Pre-populated form Segments)
- **Credit Hours** (Pre-populated from Item)
- **Contact Hours** (Pre-populated from Item)



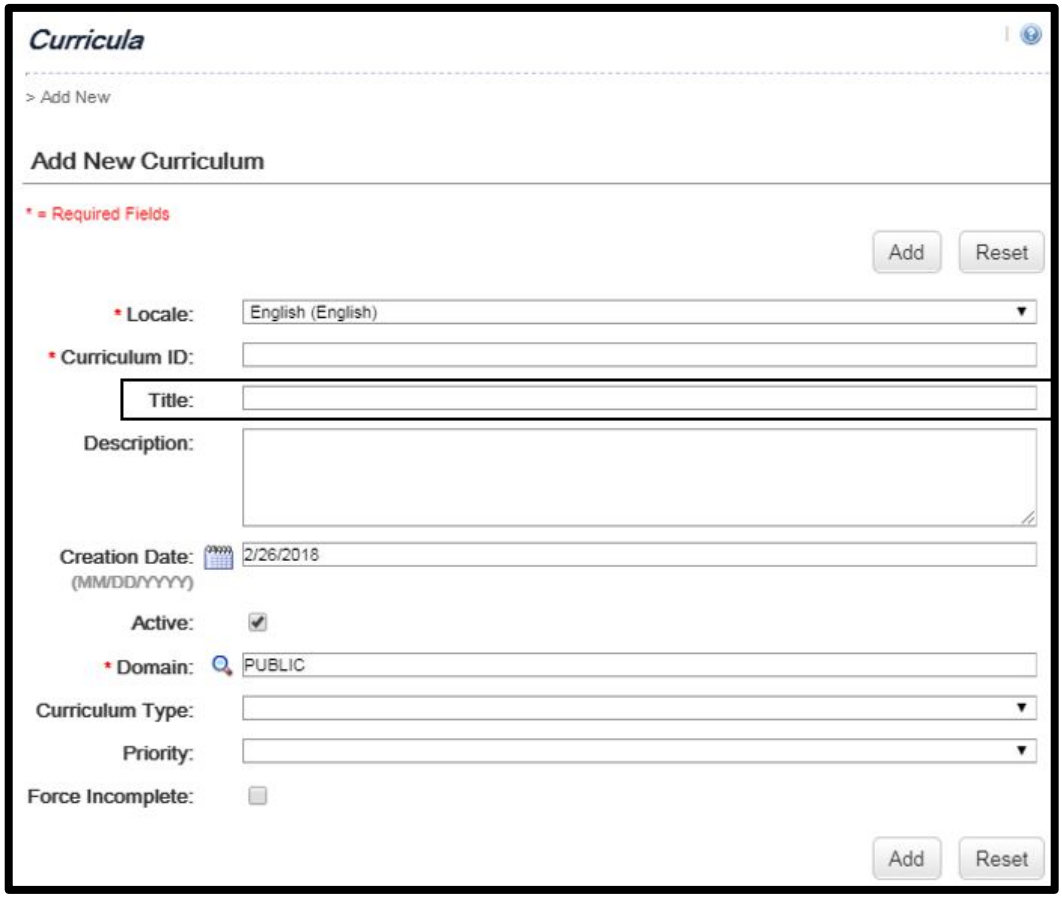
Catalog Mandatory Fields

- **All fields marked with ***
- **Description**



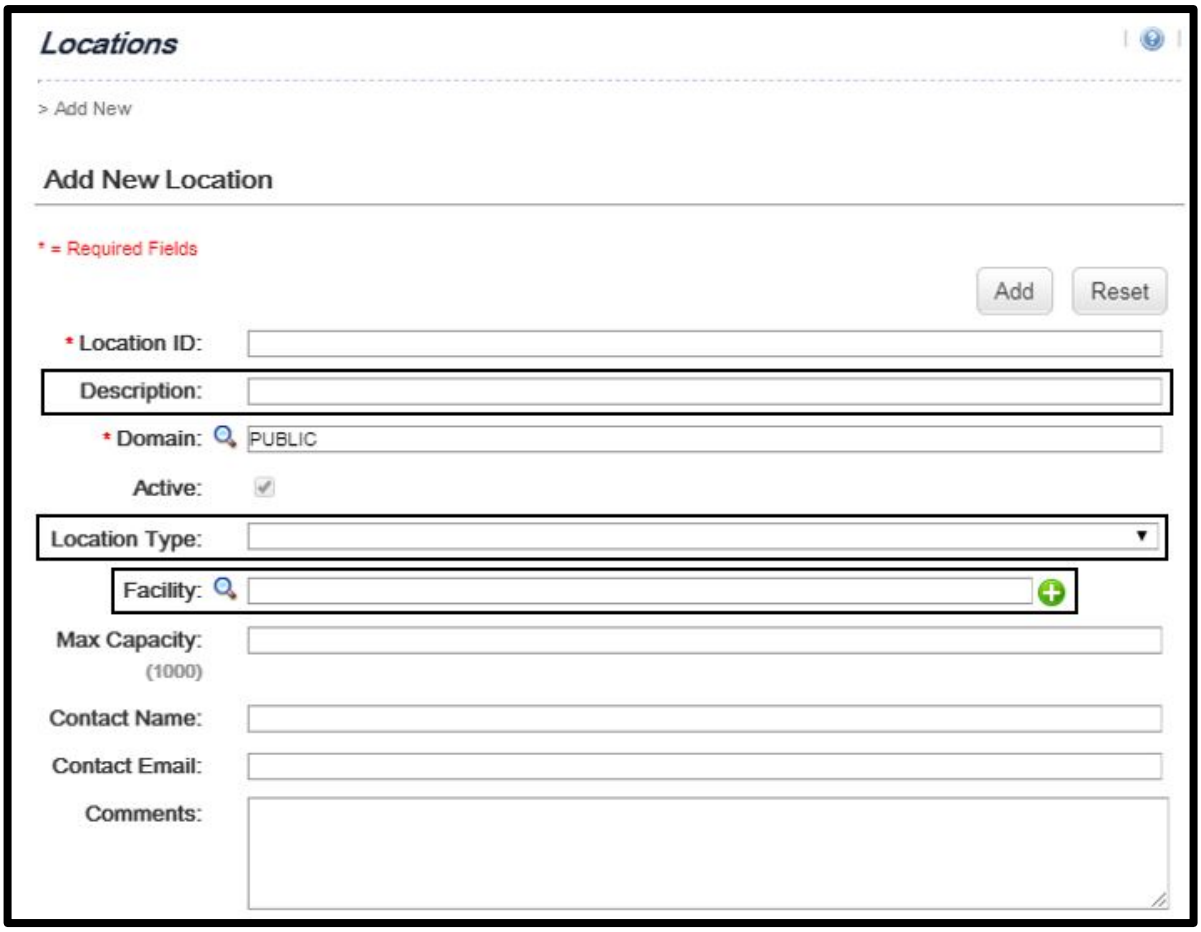
Curricula Mandatory Fields

- **All fields marked with ***
- **Title**



Locations Mandatory Fields

- **All Fields marked with ***
- **Description**
- **Location Type**
- **Facility**



Appendix C: Acceptable Codes for Custom Fields

Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code		Two character numeric code used in conjunction with the Type of Training code	EHRI Data Element
		Indicates principal subject matter and emphasis of the training	Refers to subject matter of training, **not the position of person trained.**
	01-01	Legal	01 - Training Program Area
		Education or training in the concepts, principles, theories, or techniques of law.	Functional or specialized training programs
	01-02	Medical and Health	02 -Developmental Training Program Area
		Education or training in the concepts, principles, theories, or techniques of medicine.	Formal developmental/training programs
	01-03	Scientific	03 -Basic Training Area
		Education or training in the concepts, principles, theories, or techniques of disciplines such as the physical, biological, natural, social sciences; education; economics; mathematics; or statistics.	Fundamental and/or required training programs
	01-04	Engineering and Architecture	
		Education or training in the concepts, principles, theories, or techniques of such as architecture and engineering.	

Data Element	Acceptable Codes	Description & Definition	Guidelines
	01-05	Human Resources Education or training in the concepts, principles, theories of such fields as public administration; personnel; training; equal employment opportunity; human resources policy analysis; succession planning; performance management; classification; and staffing.	
	01-06	Budget/Finance Business Administration Education or training in the concepts, principles, theories of business administration, accounts payable and receivable; auditing and internal control; and cash management.	
	01-07	Planning and Analysis Education or training in the concepts, principles, theories of systems analysis; policy, program or management analysis; or planning, including strategic planning.	
	01-08	Information Technology Education and training in the concepts and application of data and the processing thereof; i.e., the automatic acquisition, storage, manipulation (including transformation), management, system analysis, movement, control, display, switching, transmission or reception of data, computer security and the development and use of the hardware, software, firmware, and procedures associated with this processing. This training type does not include any IT training on Agency proprietary system.	

Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	01-09	Project Management Education and training in the concepts, principles, theories necessary to develop, modify, or enhance a product, service, or system which is constrained by the relationships among scope, resources, and time.	
	01-10	Acquisition Education or training in the concepts, principles, theories or techniques related to the 1102 occupation.	
	01-11	Logistic Specialty Training for professional skills of a specialized nature in the methods and techniques of such fields as supply, procurement, transportation, or air traffic control.	
	01-12	Safety and Security Training of a specialized nature in the methods and techniques of investigation, physical security, personal security, and police science.	
	01-13	Clerical (Non-supervisory clerical/administrative) Training in skills such as office management, typing, shorthand, computer operating, letter writing, telephone techniques, or word processing.	

Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	01-14	Trade and Craft Training in the knowledge, skills, and abilities needed in such fields as electronic equipment installation, maintenance, or repair; tool and die making; welding, and carpentry.	
	01-15	Foreign Affairs Training for professional skills of a specialized nature in the methods and techniques of such fields as foreign languages, foreign culture, diplomacy, strategic studies.	
	01-16	Leadership/Manager/ Communications Courses Training that address skill area such as Leadership/Management and Communication (i.e., written, oral and interpersonal) coursework.	
	01-17	Reserved for future use	
	01-18	Reserved for future use	
	01-19	Reserved for future uses	
	02-20	Pre-supervisory Program Development/training program for non-supervisors	

Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	02-21	Supervisory Program Development/training program which provides education or training in supervisory and techniques in such subjects as personnel policies and practices (including equal employment opportunity, merit promotion, and labor relations); human behavior and motivation, communication processes in supervision, work planning, scheduling, and review; and performance evaluation for first line supervisors.	
	02-22	Management Program Development/training program which provides mid management level education or training in the concepts, principles, and theories of such subject matters as public policy formulation and implementation, management principles and practices, quantitative approaches to management, or management planning organizing and controlling. (Supervisors of supervisors; GS-14/15 supervisors; GS-14/15 direct reports to SES).	
	02-23	Leadership Development Program Formal developmental program that provide leadership training and development opportunities.	
	02-24	SES Candidate Development OPM-approved program to prepare potential SES members.	

Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	02-25	Executive Development Continuing development for leaders above the GS-15 level.	
	02-26	Mentoring Program Formal stand alone program with established goals, measured outcomes, access open to all who qualify, protégées and mentors paired to facilitate compatibility, training and support provided, company benefits directly.	
	02-27	Coaching Program Formal stand alone which provides ongoing partnership with an employee and coach that helps employee produce desired results in professional lives.	
	02-28	Reserved for future use	
	02-29	Reserved for future uses	
	03-30	Employee Orientation Training of a general nature to provide an understanding of the organization and missions the Federal Government, or the employing Agency or activity, or a broad overview and understanding of matters of public policy.	
	03-31	Adult Basic Education Education or training to provide basic completeness in such subjects as remedial reading, grammar, arithmetic, lip reading or Braille.	

Data Element	Acceptable Codes	Description & Definition	Guidelines
Type of Training Sub-Code (Continued)	03-32	Mandated Training Mandatory training for all employees Government wide. This includes training required by law and/or regulation; such as ethics, information system awareness, safety, or health.	
	03-33	Work-life Training to promote work-life (e.g., health and wellness training, employee retirement/benefits training, etc.).	
	03-34	Soft Skills Training involving development of employees' ability to relate to others (i.e., customer service, effective communication, dealing with difficult people, etc.).	
	03-35	Agency Specific Agency specific required training that is not addressed in Training Program Type 01. This training type does include IT training on Agency proprietary system.	
	03-36	Basic Computer Training	
	03-37 thru 03-39	Reserved for future use	
Source of Training	01-05	Two-digit alpha-numeric code used to indicate the source of the training.	
	01	Government - Internal Training provided by a Federal department, Agency, or independent establishment for its own employees.	

Data Element	Acceptable Codes	Description & Definition	Guidelines
Source of Training (Continued)	02	Government – External Training provided by an inter-Agency training activity, or a Federal department, Agency, or independent establishment other than the one which currently employees the trainee.	
	03	Non-government Sources include commercial or industrial concern, educational institutions, professional societies or associations, consultants or individuals who are not government employees, but are contracted to develop and/or provide training course or program.	
	04	Government State/Local Training provided by a State, county or municipal government except education provided by State-operated or other public educational institution which is reported as non-government	
	05	Foreign Governments and Organizations Training provided by non United States entities which may or may not be outside the United States	
Academic Credit Code	01-05	Two digit numeric field indicating the type of academic training.	
	01	Undergraduate Credit	
	02	Graduate Credit	
	03	Continuing Education Credit	

Data Element	Acceptable Codes	Description & Definition	Guidelines
Academic Credit Code (Continued)	04 05	Post Graduate Credit NA	
Training Credit Type Code	01-03 or NA 01 02 03 04	Two digit numeric code indicating the credit type. Semester Hours Quarter Hours Continuing Education Unit Non Applicable	
Direct Cost Code	 A B C D 0	One digit alpha-numeric field used to indicate if the direct cost of a course was an individual or contract course and whether it was funded by the Agency or installation. Individual - funded by Center Individual - funded by Agency Contract - funded by Center Contract - funded by Agency No Direct Cost	 If there is no Tuition, Books & Materials, or Other Direct Costs, then On-duty hours must be at least 1.
Indirect Cost Code	 A B 0	One digit alpha-numeric field used to indicate if the indirect cost (travel/per diem) related to a course was funded by the Agency or installation. Individual - funded by Center Individual - Funded by Agency No Indirect Cost	 Not required, but if the cost code is No Cost, then code must be zero.

Data Element	Acceptable Codes	Description & Definition	Guidelines
PO Number	Blank or Free text	Purchase Order Number assigned to transaction	
Category Code	See Regional Administra-tor for acceptable codes	Alpha-numeric code used to further categorize Type of Training	Each Center has discretion on how to use this field
Sub Category Code	See Regional Administra-tor for acceptable codes	Alpha-numeric code used to further sub-categorize Category Code further	Each Center has discretion on how to use this field
Funding Organization	See Regional Administrator for acceptable codes	Alpha- numeric code used to identify which organization is funding a course.	Each Center has discretion on how to use this field
POC (Point of Contact)	See Regional Administrator for acceptable codes	Alpha-numeric code used to identify the Training Office personnel responsible for the administration of the course or training application.	Each Center has discretion on how to use this field.
Training Vendor	Organization table	Used to Identify Vendor providing training.	Must exist in the organization table.

Training Sub-Codes

Type of Training Mandatory Codes	**Type of Training Sub Code** Mandatory Codes
01 **Training Program Area**	**01** Legal
	02 Medical and Health
	03 Scientific
	04 Engineering Architecture
	05 Human Resources
	06 Budget, Finance, Business Admin.
	07 Planning & Analysis
	08 Information Technology
	09 Project Management
	10 Acquisition
	11 Logistic Specialty
	12 Safety and Security
	13 Non-Supervisory Clerical
	14 Trade and Craft
	15 Foreign Affairs
	16 Leadership/Manager Communication
	17 Reserved Future Use
	18 Reserved Future Use
	19 Reserved Future Use
02 **Development Training Program Area**	**20** Pre-Supervisory Program
	21 Supervisory Program
	22 Management Program
	23 Leadership Development Program
	24 SES Candidate Program
	25 Executive Development
	26 Mentoring program
	27 Coaching Program
	28 Reserved Future Use
	29 Reserved Future Use
03 **Basic Training Area**	**30** Employee Orientation
	31 Adult Basic Education
	32 Mandatory Training
	33 Work-Life
	34 Soft Skills
	35 Agency Specific
	36 Basic Computer Training
	37 Reserved Future Use
	38 Reserved Future Use
	39 Reserved Future Use

Appendix D: Glossary

Account Code Tab: Is used to select an authorized account code to associate with a learner so that the learner can purchase items that have a price using the chargeback payment method. NASA does not use.

Active: This checkbox is used to indicate whether a record is active.

Activity: an external activity in which there is no associated activity in SATERN

Administrator: An individual that has an assigned role and responsibility in SATERN to manage system data.

Alternate Job Positions Tab: Is used to add and edit alternative job positions (also called secondary job positions) that are associated with a learner; you can find a learner's primary job position in the Job Position box on the Summary tab (Core area).

Approval Process ID: Indicates a default approval process (if applicable) that a learner must complete before being able to complete the self-registration process.

Approval Required: This checkbox triggers the approval process entered in the Approval Process ID field.

Approval Role Tab: Is used to associate the learner with an approval role so that an administrator can assign the role to the learner for an approval process.

Assessments Tab: Is used to track a learner's progress and statistics regarding his or her competencies. NASA does not use.

Assignment Profile: Assignment Profiles associate Curricula, Domains and Competency Profiles to Learners based on the multiple attributes of the Learners. It is similar to job positions, but it offers more criteria to filter Learners. Learners 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.

Assignment Profiles Tab: Is use to review all of the assignment profiles that a learner belongs to.

Assignment Type: Identifies the Item priority on a Learner's Learning Plan. Examples: Optional, Required, Recommended, and Mandatory.

Auto Fill Registration: Sets the default for scheduled offerings, so that learners are automatically moved from the waitlist to registration slots that open up when previously registered learners withdraw.

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.

Calendar Basis: Allows the Admin to define calendar periods using the Basis Date. Learners must complete the Items before the end of the first full interval.

Cancelled: If cancelled, learner registration cannot be changed, and the admin recorded cost.

Catalog: The listing of available Items and Scheduled Offerings that Learners view and assign.

Catalog Preview Tab: Lists all the catalogs that a learner can access.

Class: A group of learners who are tracked as a group and perhaps complete a series of scheduled training requirements.

Closed: If closed, the scheduled offering is over, learner registration cannot be changed, and the admin recorded cost.

Comments: This field is for admin informational purposes only.

Commerce Tab: Is used to edit the learner's shopping account, billing, and shipping information. NASA does not use.

Completion Status: Indicates the successful, or unsuccessful, completion of an Item or Scheduled Offering (e.g., Passed, Failed).

Competencies: Associate the competencies related to the item and set the required rating that is achieved when completing the item.

Competencies Tab: Is a list of all assigned competencies, regardless of how they were assigned (through a competency profile or as free-floating competencies).

Competency Profiles Tab: Is used to associate a learner with one or more competency profiles. When you associate a learner with a competency profile, the system adds all of the competencies that are associated with that competency profile to the learner's Competencies tab.

Contact: The name of contact person for the scheduled offering (can also be included in the registration notification email).

COR: Contract Officer Representative (formerly referred to as COTR, Contracting Officer's Technical Representative)

Curriculum: A group of one or more Items that Admins, Learners, or SATERN Learning assign to Learners and track as a group.

Curricula Tab: Is used to assign curricula as well as manage all of the curricula that are assigned to the learner, regardless of how the curricula were assigned.

Custom Resources: Resources not categorized above intended to track training cost (e.g., catering, parking fees). NASA does not use.

Delay Start: It is the number of hours entered into each subsequent segment of an Item to indicate the amount of time between each segment. It is used to designate a lunch or an extended break. For delays less than one hour, you must enter a decimal value (for example, 0.25 for a 15-minute break).

Description: Additional information about the scheduled offering for learners.

Domain: A data 'location' that determines Admin ownership. Domains are used to control all records, including Learners in the database.

Disposition: To process an action

Domain Restriction: A record that determines in which Domains an Administrator may perform assigned workflows.

Effective Date: Identifies when the Curriculum status changes to "Incomplete" if the Learner does not complete the Item. This is equivalent to a "Grace Period."

Email Confirmations To: Select the corresponding check box to indicate to whom email notifications should be sent in reference to the selected scheduled offering.

Enable Learners to Waitlist: Selecting this checkbox indicates that the system will allow learners to be waitlisted for this item. If you select the Auto Fill Registration checkbox, waitlisted learners automatically replace learners who are withdrawn from the scheduled offering.

Equipment: Reusable training objects (e.g., VCR, TV, video cameras, or LCD).

Evaluations: Associate Learner Satisfaction (i.e., Level 1)

Event Basis: Based on a straight timeline from the assignment or completion of an Item within a Curriculum.

External Requests Tab (i.e., SF-182): is used to add, edit, approve, and withdraw the learner's External Requests (a form used when learners want to attend a training event that is not managed by SATERN Learning).

Facility: A building where training takes place.

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 Learner under this Substitute relationship if the Item that is currently being viewed in the Items section is actually included in the Learner's Learning Plan. If you opt to Force Credit, then a separate Learning Event is recorded in the Learner'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 Learner'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, and then the Curriculum will remain Incomplete until ALL the included Items are successfully completed.

Group Instance: A method to group scheduling offerings for reports.

Instructor: A person who will instruct or facilitate a specific portion of the scheduled offering.

Item: An assignable unit that SATERN tracks and records completion. Items are usually learning-related such as an Instructor-led course or online training.

Item Classification:

- *Online* – the Item is entirely Online Content.
- *Instructor-Led* – the Item is Instructor-led. Blended Learning is not a separate Item Classification, but Instructor-led training with Online Content.
- *Other* – the Item is a physical object (e.g. book, video cassette, etc.).

Learner: A database record that represents an employee.

Learning Event: A Learner's participation, completion, or attempted completion of an Item. This record, located under Learning History, contains the Completion Status, the completion/attempt date, and additional information.

Learning History: A detailed list of recorded Learning Events for a Learner.

Learning History Tab: Is a transcript of all the items a learner has ever taken.

Learning Plan: A "to-do" list of assigned Items for a Learner. It also includes the Required Date for each Item.

Learning Plan Tab: Is used to assign items to a learner's learning plan and manage a learner's assigned items.

Location: A space or room within facility (e.g., a classroom, computer lab).

Materials: Consumable training objects (e.g., notepads, markers, or specific training guides).

Maximum Registration: The maximum number of learners allowed in the scheduled offering. Check Enable Learners to Waitlist for the system to place learners who exceed the maximum on the waitlist

Minimum Registration: The minimum number of learners needed to hold the request schedule process. This information carries over to the scheduled offering record.

Notification: System generated emails sent to Learner, Supervisors, and/or Instructors.

Online Content: Training content that the Learner launches from the SATERN application (e.g. HTML pages, Flash movies, Word Documents, etc.).

Online Status Tab: is used to review any of the items that 1) are assigned to the learner's learning plan and 2) have online content.

Onsite Training: Centralized training offered to NASA’s workforce at a Center.

Organization Dashboard Tab: Is used to manage a learner's ownership privileges for dashboards. NASA does not use.

Organization Initiatives: You can view, add, or remove a learner's ownership privileges for initiatives by using the Organization Initiatives tab. NASA does not use.

Performance Review Tab: Is used to manage the learner's performance reviews (create, cancel, reroute, view status, approve/deny). NASA does not use.

Phone Numbers Tab: Is used to create or manage the different phone numbers that are associated with a learner.

Preferences Tab: Is used to set or change a learner's time zone, currency, locale, and locale format options.

Prerequisite: An Item the Learner must complete before he/she can self-register for a Scheduled Offering or launch an Online Item.

Published Price: The internal price of the scheduled offering (learners see catalog price). NASA does not use.

Registration Cut-Off Date/Time: The last date and time when a learner can change his/her registration status (e.g., register or withdraw).

Registration Status: The number of learners registered and waitlisted.

Registration Tab: Is used to view the learner's scheduled offering registrations.

Requests Tab: Is used to view the requests that a learner made from the learner interface for Instructor-led or blended items.

Required Date: The due date of an Item.

Resources: Assets that are assigned and reserved to a segment within a scheduled offering.

Retraining Interval: The number of days before a Learner must successfully complete an Item again.

SATERN Administrator Leads (SALs): A representative appointed by a Center or Discipline to be responsible for providing specific guidance and oversight of NASA's official Learning Management System, SATERN.

System for Administration, Training, and Educational Resources for NASA (SATERN): A Web-based software package that manages employee learning and training.

Schedule Block: It prevents resources from being scheduled into another offering during a given time. Schedule blocks are often used to make learners and resources unavailable on the learning calendar, such as when equipment is undergoing maintenance, or a learner is out of the office for an extended period of time.

Scheduled Offering: An Instructor-led or Blended Learning Item with a scheduled date and time.

Segment: A block of instruction within a Scheduled Offering. Scheduled Offerings must contain at least one Segment.

Self-Registration: Displays the Registration button to learners so they can register for the scheduled offering.

Show in this Time Zone: Displays the offering in the time zone specified above to learners and admin if Always Display Offerings in this Time Zone is not checked.

Skills Inventory Tab: Is used to manage the skills (and their ratings) that are associated with a learner.

Sub Curriculum: A Curriculum assigned to a parent Curriculum.

Subject Areas: Categories that are associated with Items (used to "Browse" the Catalog)

Substitute: An Item that, upon successful completion, provides credit for another Item.

Subordinates: A Learner that has a specified Supervisor.

Succession Planning Tab: Is used to manage a learner's ownership privileges for succession planning and talent searches. NASA does not use.

Supervisor: A Learner that oversees the learning of one or more Learners.

Surveys Tab: Is used to view information about surveys associated with the learner and details for the items that are associated with each survey. When a learner completes an item that is associated with a survey, SuccessFactors Administration adds the survey to this tab. When a learner completes the survey, SuccessFactors Administration removes the survey from this tab.

Time Zone: Indicates the time zone of the scheduled offering.

Appendix E: Learner Reference Code Values

Note: Numbers refer to the actual custom column number

1. UUPIC – Universal Uniform Personal Identification Code

Source: NASA Security Procedures Requirement (NSPR 1600-1)

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
9 digit unique number	UUPIC	Universal Uniform Personal Identification Code – Replaces SSN

2. Duty Status

Source: FPPS

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
A	ACTIVE	
C	CAREER-SEASONAL	
D	DEATH	
F	FECA	
I	IPA 50% REIMBURSED	
L	LWOP/FURLOUGH/SUSPENSION	
M	MILITARY FURLOUGH	
N	SEPARATIONS-RIF/IN LIEU OF ADV ACT	
P	IN PROGRESS	
Q	SEPARATIONS-QUITS	
R	SEPARATIONS-RETIRMENT	
S	SEPARATIONS-INTERNATIONAL ORG/IPA	
U	SEPARATIONS-RSGN/TERM/DSCHG/RMV	
V	CASUAL/ACTIVE	
W	CASUAL/INACTIVE	
Y	ACTIVE YCC ENROLLEE	
Z	SEPARATED YCC ENROLLEE	

6. NASA Class Code

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
10000	Wage Grade	
20001	Pending Classification	
20101	General Engineer	
20201	Safety Engineer	
20301	Fire Prevention Engineer	
20501	Materials Engineer	
20602	Landscape Engineer	
20701	Civil Engineer	
20702	Structural Engineer	
21001	Environmental Engineer	
21101	Mechanical Engineer	
21401	Electrical Engineer	
21501	Electronics Engineer	
21601	Naval Engineer	
21701	Chemical Engineer	
21901	Industrial Engineer	
22001	Aerospace Engineer	
25001	Health Physicist	
25101	Physicist	
25201	Chemist	

25301	Metallurgist
25401	Meteorologist
27001	Mathematician
27101	Mathematical Statistician
27102	Computer Scientist
27201	Statistician
27301	Operations Research Analyst
28101	Agronomist
28201	Cartographer
28301	Geographer
28501	Photographic Technologist
29500	Expert
29600	Consultant
29999	Graduate Coop Student
30001	Pending Classification
30101	Engineering Aid
30102	Architectural Technician
30103	Civil Engineering Technician
30104	Chemical Engineering Tech
30105	Mining Engineering Tech
30106	Electrical Engineering Tech
30107	Engineering Technician
30108	Materials Engineering Tech
30109	Mechanical Eng Technician
30110	Nuclear Engineering Tech
30111	Naval Architectural Tech
30112	Industrial Engineering Tech
30113	Aerospace Engineering Tech
30114	Industrial Engineering Aid
30115	Petroleum Engineering Aid
30116	Biomedical Eng Tech
30117	Student Trainee (Eng Aid)
30501	Electronic Technician
31001	Engineering Drafting
31501	Equip Spec – Electrical
31502	Equipment Specialist
31503	Equip Spec – Machinery
31504	Equipment Spec – Prec. Instrs.

31505	Equip Spec – Air Prop. Sys.
31506	Equip Spec – Electronic
31507	Equip Spec – Automotive
31508	Equip Spec – Machine
32001	Mathematics Techn/Aid
32002	Mathematics Aid
32501	Physical Science Aid
32502	Physical Sci Technician
33001	Meteorological Technician
33101	Bil Lab Technician
33102	Biological Aid/Tech
33103	Agri Research Tech
33201	Cartographic Tech Photo
33202	Surveying Technician
33301	Health Aid Technician
33501	Safety Technician/Supv
33702	Dental Aid/Assistant
33703	Med Machine Aid/Tech
33801	Medical Aid/Technician
34001	Student Trainee – General
34002	Student Trainee – Soc. Sci
34003	Student Trainee – Bio. Sci.
34004	Student Trainee – Engineer
34005	Student Trainee – Phy. Sci.
34006	Student Trainee – Math Sci.
34007	Stu Trainee (Qual. Assur)
34008	Stu Trainee (Med & Health)
34501	Illustrator
34502	Illustrator – Scientific
34503	Illustrator – Tech Equip.
35001	Photographer
35002	Photographer – Still
35003	Photographer – Laboratory
35004	Photographer – Motion Pict.
35005	Photographer – Sci. & Tech.
35006	Photographic Officer
35007	Photographic Aid
35008	

35008	Photographic Aid - Trainee
35009	Stu Trainee (Photography)
35501	Quality Assurance
35502	Qual Assur – Aerospace
35503	Qual Assur – Electrical
35504	Qual Assur – Electronic
35505	Qual Assur – Mechanical
35506	Qual Assur – Materials
35507	Qual Assur – Chemical
35508	Qual Assur – Preserv:Pack
35509	Qual Assur – Metrology
35510	Qual Assur - Process
36001	Construction Inspection
36202	Miscellaneous Inspection
36301	Fire Protect & Prevent
36401	Guard Service
36502	Telecommunications Spec
37001	Facility Management Group
37501	Facility Maint Group
37502	
38001	Production Controller
39001	Ship Surveying
39002	Marine Cargo
39003	Packing
39004	Steward
39005	Gen Housekeeping
39006	Aviation Safety Officer
39007	FLT Sysms Safety SP/OFF
39008	Aircrew Technician Series
39999	
50001	Pending Classification
50002	Stu Trainee (Ofc Support)
50201	Messenger
50301	Receptionist
50401	Mail and File Clerk
50402	Mail Clerk
50403	File Clerk
50	

50501	Correspondence Clerk
50701	Stu Trainee (Education)
51001	Personnel Clerk/Assistant
51002	Discrim Compl Pro Asst/TP
51003	Security Clerk (Typing)
51004	Program Analysis Asst
51005	Resources Asst
51006	Equal Opportunity Asst
51007	Student Trainee - Personnel
51008	Stu Trainee (Public Affrs)
51009	Stu Trainee (Resources)
51010	Program Support Asst
51011	Security Clerk/Assistant
51101	Printing Clerk
51201	Clerk – Translator
51202	Sign Language Aid
51301	Editorial Clerk/Assistant
51302	Stu Trainee (Tech Editor)
51401	Statistical Clerk/Assis.
51501	Office Draftsman
51502	Stu Trainee (Visual Info)
51503	Stu Trainee (Info & Arts)
51601	Computer Clerk/Assist
51602	Stu Trainee (Com/Systems)
51701	Archivist Aid/Technician
51801	Student Management Aid
51901	Medical Record Technician
51902	Stu Trainee (Investigation)
51903	Stu Trainee (Supply)
51904	Stu Trainee (Transportn)
51905	Stu Trainee (Pers Mgmt)
52001	Secretary - General
52002	Secretary - Stenography
52003	Secretary - Typing
52004	Secretary – Dict. Mach. Tran
52005	Secretary (Sten/Ofc Auto)
52006	Secretary – (Ofc Auto)
5210	

52101	Stenographic Unit. Super.
52201	Clerk – Stenographer
52202	Stu Trainee (Clerk – Steno)
52301	Typing Unit Supervisor
52401	Clerk – Typist
52501	Closed Microphone Report
52601	Office Automation Clerk
52602	Office Automation Asst
52701	Information Clerk
53101	Equipment Operator
53201	Elec Accounting Mach Oper
53202	Elec Accounting Mach Sup
53301	Eam Proj Planner/Super
53302	Eam Program Supervisor
53401	Computer Operator
53501	Peripheral Equip Operator
53601	Card Punch Operator
54001	Telephone Operator
54101	Teletypist
54201	Crypt Equip Operator
54301	Communications Equip Oper
54401	Communications Clerk
55001	Office Services Man/Super
55101	Mgmt Clerical & Assistance
55102	Student Trainee Management
56000	Financial Clerical & Asst
56001	Accounting Clerk/Assist
56002	Budget & Account Tech
56003	Budget Clerk/Assistant
56004	Student Trainee (Budget)
56006	Stu Trainee (Fin Mgmt)
56101	Accounts Maint Clerk
56201	Accounting Technician
56301	Teller
56401	Voucher Examiner
56501	Payroll
56701	Accounting Student Train

57001	Purchasing Agent
57002	Procurement Clerk
57003	Stu Trainee (Procurement)
57004	Stu Trainee (Bus & Indus)
57501	Supply Clerical & Tech
57601	Propty Dspsl Cercl Tech
57602	Stu Trainee (Equipment)
57603	Stu Trainee (Facil Mgmt)
58001	Freight Rate Cl Asst/Tech
58101	Travel Clerk/Assistant
58201	Shipment Clerk/Assistant
58301	Cargo Scheduler
58401	Motor Vehicle Dispatcher
58501	Transportation Clerk Asst
59101	Legal Clerk & Techn Ser
59102	Stu Trainee (Legal)
59103	Stu Trainee (Copyrt & Pat)
59501	Library Aid/Tech
59601	Stu Train (Tec Inf/Com SC)
59602	Stu Trainee (Libr & Archv)
60001	Pending Classification
60101	Administrative Management
60102	Administrative Officer
60103	Administrative Operations
60104	Manpwr & Org Officer
60105	Program Management
60106	Support Services Admin
60107	Program Support Analyst
60201	Program Analysis
60201	Program Analysis
60301	Management Analysis
60302	Mgmt & Program Analysis
60401	Project Anal & Control
60501	Computer System Analyst
60502	Computer Programmer
60503	Computer Programr Analyst
60504	Computer Systems Progrmer

60505	Computer Equipment Analyst
60506	Computer Specialist
60601	Resources Mgmt Spec/Off.
61001	Contract Program Admin
61002	Contract Negotiation
61003	Contract Administration
61004	Contract Operations
61005	Contract Pricing Analysis
61006	Contract Termination
61101	Procurement Mgmt General
61102	Procurement Operations
61103	Procurement Analysis
61401	Supply Program Management
61402	Supply Operations
61403	Inventory Management
61404	Distrib Facil – Storage Mgmt
61405	Supply Cataloger
61501	Industrial Property Admin
61601	Property Disposal
61602	Property Utilization
61603	Property Marketing
61701	Realty
61901	General Transportation
61902	Traffic Management
61903	Transportation Operations
62000	Resources Control Spec
62001	Financial Program Mgmt
62101	Financial Operations
62102	Financial Systems
62201	Audit Management
62301	Budget Management
62401	Budget and Accounting
62501	General Accounting
63001	Personnel Program Admin
63002	Personnel Mgmt & Ops.
63101	Pers Staffing – Recruitment
63102	Personnel Staffing
63103	

63103	Pers Staffing – Examining
63201	Position Classification
63301	Employee Development
63401	Labor Relations Spec
63501	Employee Relations
63601	Equal Employment Spec/Mgr
64001	Public Affairs Program Mgmt
64101	Public Affairs Specialist
64301	Protocol
64302	Protocol Officer
65001	Tech Writing & Editing
65101	Writing and Editing
65201	Librarian
65301	Tech Information Services
65401	Technical Lit Translation
66001	Attorney
66002	Law Clerk
66101	Legislative Affairs
66201	Patent Attorney
66301	Patent Adviser
66401	Paralegal Specialist Ser
66601	General Educ & Training
66602	Education Specialist
66701	Training Instruction
67001	Gen Arts & Information
67101	Exhibits Specialist
67201	Visual Information
67301	Audio Visual Production
67501	Security Program Admin
67502	Personnel Security
67503	Physical Security
67504	Industrail Security
67505	Security Ops – General
67601	General Investigation
67602	Criminal Investigation
68001	Gen Business & Industry
68101	Industrial Specialist

68201	Contractor Indus Relatns
69500	Expert
69600	Consultant
69801	Archivist
69802	Recreation Specialist
69803	Foreign Affairs
69804	Manpower Development
69901	International Relations
69902	History
69903	Economics
69904	Communications Management
69905	Safety Management
69906	Printing Management
69907	Aircraft Operations
69908	Community Rel Specialist
69909	Mgmt Intern
69910	Fed Personnel Intern
69911	Logistics Mgmt Specialist
69912	Presidential Mgmt Intern
69999	Graduate Cooperative Stu
70001	Pending Classification
70009	Pending Classification
70090	Pending Classification
70091	Pending Classification
70092	Pending Classification
70093	Pending Classification
70094	Pending Classification
70095	Pending Classification
70096	Pending Classification
70097	Pending Classification
70098	Pending Classification
70099	Pending Classification
70100	Space Sciences
70101	Space Sciences
70103	Ast – Space Sciences
70105	Atmospheres & Ionospheres
70109	Space Sciences
70110	

70110	Ionospheres
70115	Fields and Particles
70120	Stellar Studies
70125	Planetary Studies
70126	Ast – Lunar & Planetary Stu
70130	Meteroid Studies
70135	Solar Studies
70154	Geological Utilization
70155	Oceanographic Utilization
70180	Space Sciences Prog Mgt
70181	Aeronomy Program Mgt
70182	Fields & Particles Prog Mgt
70183	Stellar Studies Prog Mgt
70184	Lun & Plan Stud Prog Mgt
70185	Solar Studies Program
70190	Pending Classification
70191	Pending Classification
70192	Pending Classification
70193	Pending Classification
70194	Pending Classification
70195	Pending Classification
70196	Pending Classification
70197	Pending Classification
70198	Pending Classification
70199	Pending Classification
70200	Applications Sciences
70202	Earth Sciences Remote Sens
70203	Applications Sciences
70204	Atmospheric Chem Dynamics
70205	Global Ecology Studies
70206	Atmospheric Measurement
70207	Applicat/Data Management
70208	Science Missions
70209	Application Sciences
70290	Pending Classification
70291	Pending Classification
70292	Pending Classification

70293	Pending Classification
70294	Pending Classification
70295	Pending Classification
70296	Pending Classification
70297	Pending Classification
70298	Pending Classification
70299	Pending Classification
70581	Ast – Life Scie Prog Mgmt
70620	Psychological Studies
70630	Plant Studies
70650	Molecular Biodynamics
70655	Radiobiological Studies
70860	Bionics Studies
70900	Life Sciences and Systems
70901	Life Sciences and Systems
70909	Life Sciences and Systems
70910	Life Environmental Studies
70911	Life Sciences Pro. Mgmt
70921	Biochemical Processes
70922	Physiological Studies
70923	Neurobiological Studies
70931	Chem & Biological Evolution
70932	Biological Adaptation
70933	Solar System Analysis
70941	Environmental Physiology
70942	Human Perforamnce Studies
70943	Medical Studies
70944	Environmental Control
70945	Manned Systems
70990	Pending Classification
70991	Pending Classification
70992	Pending Classification
70993	Pending Classification
70994	Pending Classification
70995	Pending Classification
70996	Pending Classification
70997	Pending Classification

70998	Pending Classification
70999	Pending Classification
71000	Fluid & Flight Mechanics
71001	Fluid & Flight Mechanics
71002	Aerothermodynamics
71009	Fluid & Flight Mechanics
71010	A/SP Veh Desgn/Mssn Analy
71015	Navig/Guid/Control Systems
71030	Fluid Mechanics
71035	Magnetofluid Dynamics
71040	Aerostructural Dynamics
71045	Flight Vehicle Acoustics
71055	Heat Transfer
71060	Stability, Cntrl & Perform
71065	Flight Veh. Atmos. Envir
71068	Basic Properties of Gases
71069	Ast – Basic Props of Gases
71080	Fluid & Flight Mech Pro. Man
71090	Pending Classification
71091	Pending Classification
71092	Pending Classification
71093	Pending Classification
71094	Pending Classification
71095	Pending Classification
71096	Pending Classification
71097	Pending Classification
71098	Pending Classification
71099	Pending Classification
71500	Materials & Structures
71501	Materials & Structures
71502	Structural Dynamics
71503	Mechanics of Materials
71509	Materials and Structures
71510	Materials
71515	Structural Materials
71517	Aerosp Matallic Materials
71520	Basic Props of Materials

71525	Aerosp Polymeric Material
71535	Aerosp Ceramic Materials
71540	Friction & Lubrication
71550	Structural Mechanics
71555	Flight Structures
71580	Mats & Strucs Prog Manage
71590	Pending Classification
71591	Pending Classification
71592	Pending Classification
71593	Pending Classification
71594	Pending Classification
71595	Pending Classification
71596	Pending Classification
71597	Pending Classification
71598	Pending Classification
71599	Pending Classification
72000	Propulsion Systems
72001	Propulsion Systems
72002	Electric Propulsion Systm
72003	Electrical Power Systems
72004	Airbreath Propulsion Syst
72005	Liquid Propulsion Systems
72006	Mechanical Components
72009	Propulsion and Power
72010	Solid Propulsion Systems
72020	Electrical Prop. & Power
72025	Direct Energy Conversion
72040	Nuclear Energy Processes
72050	Fuels/Combustion Processes
72060	Propulsion Flow Dynamics
72070	Prop. Sys. Proj. Management
72080	Prop. Program Management
72081	Nuclear Prop Prog Mgmt
72082	Liq. Prop. Prog. Management
72083	Elec Prop & Pwr Prog Mgmt
72084	Solid Prop. Prog. Mgmt
72085	Ast – Nucl Prop Pgm Mgmt

72086	Ast - Elec Prop Pwr Pgm Mgt
72087	Ast– Elec Prop Pwr Pgm Mgt
72090	Pending Classification
72091	Pending Classification
72092	Pending Classification
72093	Pending Classification
72094	Pending Classification
72095	Pending Classification
72096	Pending Classification
72097	Pending Classification
72098	Pending Classification
72099	Pending Classification
72500	Flight Systems
72501	Flight Systems
72502	Ast – Flight Systems
72504	Reliability & Qual Assur
72505	Reliability
72509	Flight Systems
72510	Flight Systems Test
72511	Ast Flt Systems Safety
72512	Aerospace Flight System
72513	Flight System Design
72515	Electronic Syst Fail Anal
72516	Crew Station Systems
72517	Environ Control Systems
72520	Experimental Mfg Techs
72522	Quality Assurance
72530	Electrical Systems
72535	Manned Space Flt Systems
72536	Ast – Manned Space Flt Syst
72537	Aeronautical Flt Research
72570	Space Vehicle Proj Mang
72571	Spacecraft Proj Management
72572	Launch Vehicle Proj. Mgmt
72573	Aeron Flt Rsh Proj Mgmt
72580	Flight Systems Prog Mgmt
72581	Spacecraft Program Mgmt

72582	Launch Vehicle Prog Mgmt
72583	Ast – Launch Veh Prog Mgmt
72585	Flt Systems Test Prog Mgmt
72586	Reliability Program Mgmt
72587	Qual Assurance Prog Mgmt
72588	Ast – Flight Sys Prog Mgmt
72589	Ast – Spacecraft Prog Mgmt
72590	Pending Classification
72591	Pending Classification
72592	Pending Classification
72593	Pending Classification
72594	Pending Classification
72595	Pending Classification
72596	Pending Classification
72597	Pending Classification
72598	Pending Classification
72599	Pending Classification
73000	Meas & Instrumentation Sys
73001	Meas & Instrumentation Sys
73002	Ast – Measmt & Instrmtn Sys
73005	Sensors & Transducers
73009	Measurement & Instrum
73010	Electronic Instrmtn System
73015	Optical Physics
73016	Electro – Optical Sensor Sys
73017	Fluid State Devices
73020	Meas Standards & Calibr
73025	Control Systems
73026	Guidance/Navigation System
73037	Tracking & Tele Systems
73040	Electromagnetic Systems
73043	Tracking Systems
73045	Telemetry Systems
73055	Telecommunications
73057	Electronics of Materials
73065	Microwave Phy Electronics
73080	Meas & Instr Sys Prog Mgt

73081	Tele Sys Prog Management
73082	Telecom. Program Mgmt
73083	Ast – Meas & Intr Prog Mgmt
73090	Pending Classification
73091	Pending Classification
73092	Pending Classification
73093	Pending Classification
73094	Pending Classification
73095	Pending Classification
73096	Pending Classification
73097	Pending Classification
73098	Pending Classification
73099	Pending Classification
73500	Data Systems
73501	Data Systems
73502	Data Systems
73503	Software Systems
73504	Modeling
73505	Data Analysis
73506	Data Systems Analysis
73507	Flight Data Systems
73507	Flight Data Systems
73508	Ground Data Systems
73508	Ground Data Systems
73509	Data Systems
73510	Theoretical Simulation Tech
73511	Flight Software Systems
73512	Ground Software Systems
73513	Hardware Systems
73514	Flight Hardware Systems
73515	Ground Hardware Systems
73516	Computer Res/Development
73580	Data Systems Program Mgmt
73590	Pending Classification
73591	Pending Classification
73592	Pending Classification
73593	Pending Classification
73594	

73594	Pending Classification
73595	Pending Classification
73596	Pending Classification
73597	Pending Classification
73598	Pending Classification
73599	Pending Classification
74000	Facilities & Operations
74001	Exper Facils. & Equip.
74002	Exper/Facilities Develop
74003	Facility Systems Safety
74005	Launch & Flight Opers
74006	Flight Mission Operations
74009	Facilities and Operations
74010	Mech – Experimental Equipmt
74015	Gas and Fluid Systems
74020	Electrical Exper Equip
74025	Exper Facility Techniques
74040	Nuclear Exper Techniques
74080	Exper Fac & Equip Prog Mgt
74081	Launch & Flt Op Prog Mgmt
74082	Ast – Exp Fac: EQ Pgm Mgt
74083	Ast – Launch & Flt Prog Mgt
74090	Pending Classification
74091	Pending Classification
74092	Pending Classification
74093	Pending Classification
74094	Pending Classification
74095	Pending Classification
74096	Pending Classification
74097	Pending Classification
74098	Pending Classification
74099	Pending Classification
74501	Research Piloting
74502	Flight Training
74503	Flight System Operations
74504	Mission Support Requirement
74505	Mission Operations Integr

74506	Flight Activity Planning
74507	Mission Specialist Astron
74508	Pilot Astronaut
74509	Operations
74510	Research Piloting
74511	Launch/Flight Operations
74512	Aircraft Mission Operat
74590	Pending Classification
74591	
77000	Management
77001	Executive Management
77002	Ast – Executive Management
77003	Ast – Executive Management
77009	Pending Classification
77010	Project Management
77011	Ast – Project Management
77012	Ast – Project Management
77030	Technical Management
77031	Tech Management Systems
77032	Tech Resources Management
77033	Phys Sci Tech Resource Mgmt
77034	Tech Eng Operations Mgmt
77035	Ast – Technical Management
77036	Life Science Tech/Res Mgmt
77040	Technology Utilization
77041	Technology Utilization
77055	Tracking Station Mgmt
77056	Launchsite Support Mgmt
77060	Program Management
77061	Program Management
77062	Space Science Program Mgmt
77063	Earth Science Program Mgmt
77064	Life Science Program Mgmt
77065	Fluid/Flight Mech Prog Mgmt
77066	Material/Structure Prog Mgmt
77067	Propulsion Program Mgmt
77068	Flight System Prog Mgmt

77069	Measurmt/Instrumtn Pr Mgmt
77070	Data System Program Mgmt
77071	Facilities Program Mgmt
77072	Telecommunications Pr Mgmt
77073	Adv Technology Prog Mgmt
77074	Adv Technology Prog Mgmt
77080	Program Management
77081	Ast – Program Management
77082	Ast – Program Management
77083	Ast – Program Management
77085	Res Grants & Cont Pgm Mgmt
77086	Ast – Res Grnt: Cntr Prg Mgt
77088	Adv Technology Prog Mgmt
77089	Ast – Adv Tech Prog Mgmt
77090	Management
77091	Pending Classification
77092	Pending Classification
77093	Pending Classification
77094	Pending Classification
77095	Pending Classification
77096	Pending Classification
77097	Pending Classification
77098	Pending Classification
77099	Pending Classification
79500	Expert
79600	Consultant
79999	Graduate Cooperative Stu
90001	Pending Classifcation
90101	Med Off – Aviation Medicine
90102	Med Off – Ocupational Med
90103	Medical Officer – Other
90501	Psychologist
90601	Biologist
90602	Microbiologist
90701	Physiologist
90801	Nurse
90901	Medical Technologist

91001	Veterinarian
91101	Industrial Hygenist
91201	Zoologist
91301	Botanist
91401	Health Science
99500	Expert
99600	Consultant
99999	Graduate Cooperative Stu

7. Pay Plan/Grade

Source: The CPDF Guide to Personnel Data Standards, http://www.opm.gov/feddata/guidance.asp

8. Supervisory Status

Source: The CPDF Guide to Personnel Data Standards, http://www.opm.gov/feddata/guidance.asp

9. Position Type

Source: FPPS Work Schedule Table

14. Mail-Code

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
Center Specific	Center Acronym followed by Organization Code	

15. NASA Class Block Code

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
1	WAGE GRADE	
2	NON AST SCIENTISTS AND ENGINEERS	
3	TECHNICIANS	
5	CLERICAL	
6	PROFESSIONAL ADMINISTRATIVE	
7	AST SCIENTISTS AND ENGINEERS	
9	MEDICAL	

17. Degree Level

Source: The CPDF Guide to Personnel Data Standards, http://www.opm.gov/feddata/guidance.asp

19. Supervisory Level Code

Source: FPPS

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
1	ADMINISTRATOR	
2	DEPUTY ADMINISTRATOR	
3	ASSOCIATE ADMINISTRATOR	
4	ASSOCIATE DEPUTY ADMINISTRATOR	
5	EXECUTIVE OFFICER	
6	CHIEF SCIENTIST	
7	CHIEF ENGINEER	
8	CHIEF TECHNOLOGIST	
9	CHIEF OF STAFF	
10	CHIEF FINANCIAL OFFICER	
11	CENTER DIRECTOR	
12	CENTER DEPUTY DIRECTOR	
13	CENTER ASSOCIATE DIRECTOR	
14	CENTER ASSISTANT DIRECTOR	
15	CHIEF, CENTER STAFF OFFICE	
16	DEPUTY CHIEF, CENTER STAFF OFFICE	
17	SPECIAL ASSISTANT TO CENTER DIRECTOR	
18	SENIOR SCIENTIST	
19	CHIEF ENGINEER	
20	PROGRAM MANAGER (AGENCY)	
21	ORGANIZATION DIRECTOR	
22	ORGANIZATION DEPUTY DIRECTOR	
23	ORGANIZATION ASSOCIATE DIRECTOR	
24	ORGANIZATION ASSISTANT DIRECTOR	
25	MID-MANAGERS-MANAGER	
26	DIVISION OR OFFICE CHIEF	
27	DEPUTY DIVISION OR DEPUTY OFFICE CHIEF	
28	ASSOCIATE/ASSISTANT DIVISION OR OFFICE CHIEF	
29	BRANCH OR OFFICE CHIEF	
30	DEPUTY BRANCH CHIEF OR DEPUTY OFFICE CHIEF	
31	ASSOCIATE/ASSISTANT BRANCH OR OFFICE CHIEF	
32	SECTION HEAD/GROUP LEAD/TEAM LEAD	
33	ASST SECTN HEAD/ASST TEAM/GROUP LEAD	
34	ALL OTHER PAID CIVIL SERVICE	
35	INTERGOVERNMENTAL PERSONNEL ACT	
36	NON PAID OTHERS	
37	GRANTEES	
38	VOLUNTEERS	
39	MILITARY DETAILEES	

21. Supervisor Bypass Flag

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
N	NO	
Y	YES	Supervisor field will not be overwritten by FPPS if flag is set to Yes

22. Company Name

Source: NASA Enterprise Directory, https://webdir.nasa.gov/

23. Last Email Address

Source: NASA Enterprise Directory, https://webdir.nasa.gov/
Note: This field is populated with last known e-mail address when an account is inactivated

24. Occupational Series Code

Source: http://www.opm.gov/

Series Range	Occupational Group
0000 - 0100	Miscellaneous Occupations
0100 - 0199	Social Science, Psychology, and Welfare
0200 - 0299	Human Resources Management
0300 - 0399	General Administrative, Clerical, and Office Services
0400 - 0499	Biological Sciences
0500 - 0599	Accounting and Budget
0600 - 0699	Medical, Hospital, Dental, and Public Health
0700 - 0799	Veterinary Medical Science
0800 - 0899	Engineering and Architecture
0900 - 0999	Legal and Kindred
1000 - 1099	Information and Arts
1100 - 1199	Business and Industry
1200 - 1299	Copyright, Patent, and Trade-Mark
1300 - 1399	Physical Sciences
1400 - 1499	Library and Archives
1500 - 1599	Mathematics and Statistics
1600 - 1699	Equipment, Facilities, and Service
1700 - 1799	Education
1800 - 1899	Inspection, Investigation, Enforcement, and Compliance
1900 - 1999	Quality Assurance, Inspection and Grading
2000 - 2099	Supply
2100 - 2199	Transportation
2200 - 2299	Information Technology Management

25. COTR

CODE	SHORT DESCRIPTION	LONG DESCRIPTION (IF APPLICABLE)
N	Not Certified	
N/A	Not Applicable	
Y	Certified	

26. Company Org Code

Source: NASA Enterprise Directory, https://webdir.nasa.gov/

27. AUID

Source: NASA Enterprise Directory, https://webdir.nasa.gov/

28. SF182 Pay-Plan

Source: Derived from Custom Field 7 Pay Plan/Grade

29. SF182 Pay Grade

Source: Derived from Custom Field 7 Pay Plan/Grade

30. Supervisor Start Date

Source: FPPS Download

Note: This field is not yet available. Field created for future use.