SATERN Job Aid

SATERN Manager Quick Reference Job Aid
Version 5
Updated December 1, 2020

Audience: This job aid is for use by National Aeronautics and Space Administration (NASA) personnel with Manager access to the System for Administration, Training, and Educational Resources for NASA (SATERN).

Purpose: This guide is intended help NASA managers:

- Set Delegates
- Set Alternate Manager
- Assign and Remove Learning
- Approve Training Requests
- View Dashboard
- Run Reports

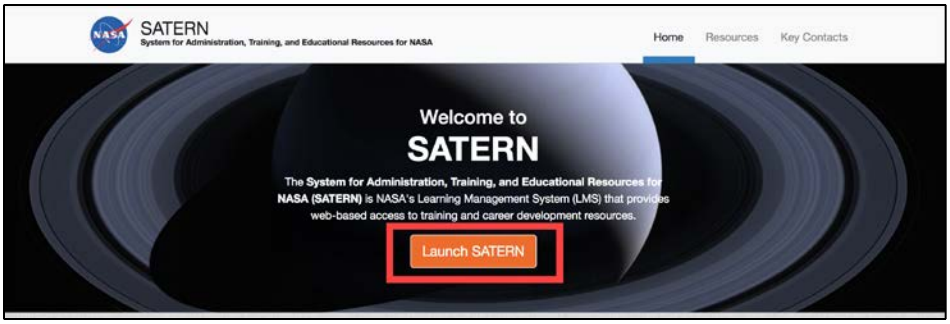
Tasks: Click the following links to access the needed instruction:

Task A – Logging In, Navigating, and Searching

Logging Into SATERN

Visit https://satern.nasa.gov, and click the **Launch SATERN** button as shown in the following figure:

Figure 1: SATERN Welcome Page Showing Launch SATERN Button



You should automatically be signed into SATERN with single sign-on. Your **My Learning (SATERN)** page is displayed.

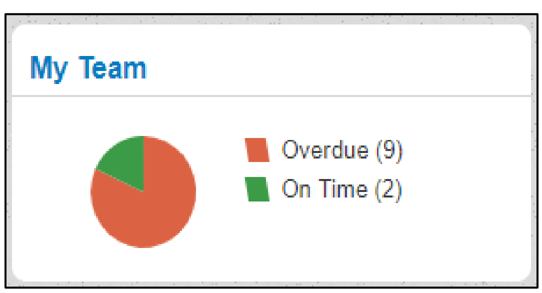
Navigating to the My Team Page

> **Note:** Depending on the tiles and options available in your My Learning (SATERN) page, yours may appear in slightly different locations than displayed in the figures in the SATERN job aids. The **My Team** tile was previously called the **My Employees** tile.

You can access your employees' information in the following two ways from the **My Learning (SATERN)** page:

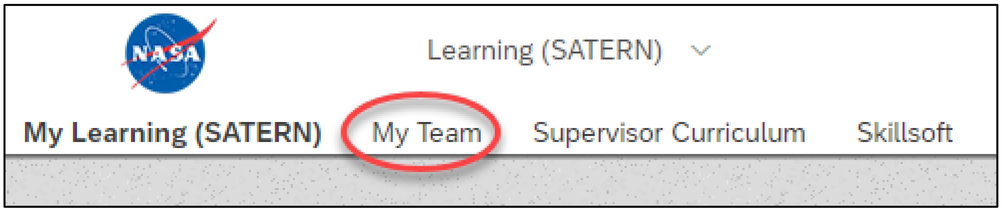
- Click the **My Team** tile:

Figure 2: My Team Tile



- Click the **My Team** link at the top of your screen as shown in the following figure:

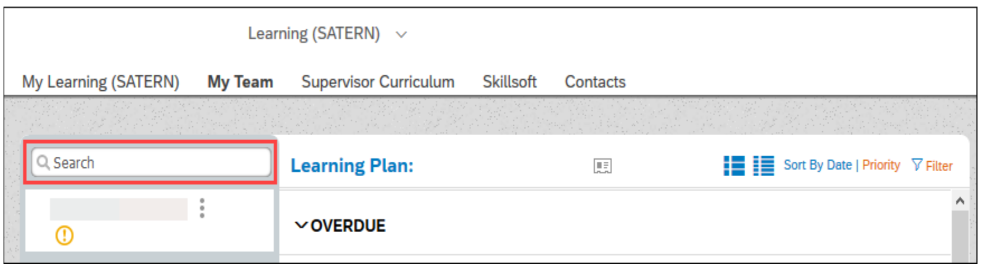
Figure 3: My Team Link



Searching for My Team

1. From the **My Team** page, in the **Search** field, type the employee's name, then press the **Enter** key. The following screen shows the location of the Search field:

Figure 4: My Team Page Showing Location of Search Field



2. If you have multiple employees with similar names, select the employee you would like to manage.

Task B – Setting Delegates

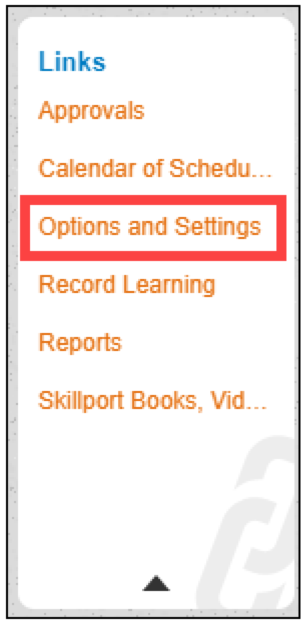
A delegate is another user you identify to assist you with completing some supervisory functions. You can use the Delegates area to add or edit the permissions for a delegate (e.g., if you plan to take an extended holiday or cannot access the user interface for some reason).

Adding a Delegate

To add a delegate:

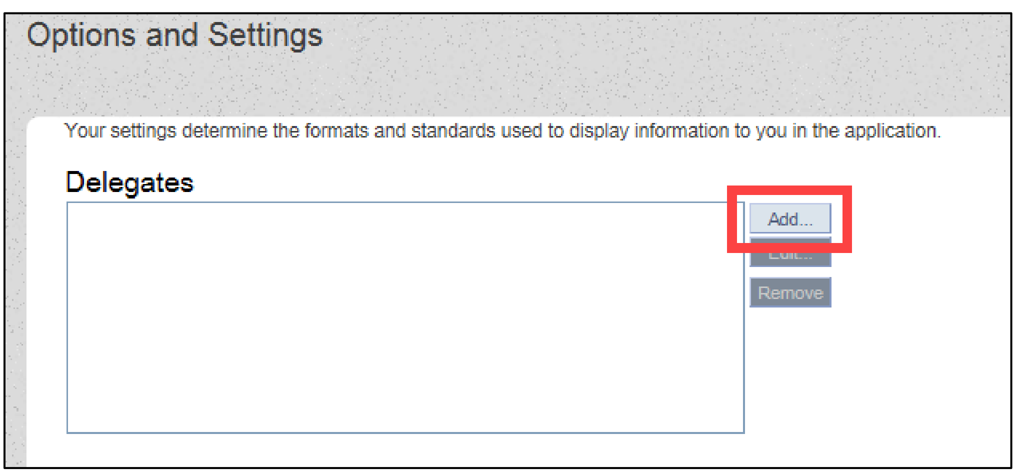
1. From the **My Learning (SATERN)** page, in the **Links** tile, click the **Options and Settings** link as shown in the following figure:

Figure 5: Links Tile Showing Options and Settings Link



2. In the **Delegates** area, click the **Add** button as shown in the following figure:

Figure 6: Options and Settings Screen Showing Delegates Add Button



3. In the **Search User** field, type the name of the user you wish to identify as a delegate for your records. (If you would like to search using different filter criteria, click the **Advanced Search** link, populate the filters as desired, and click the **Search** button.)

   The system displays a matching list of users, as shown in the following figure:

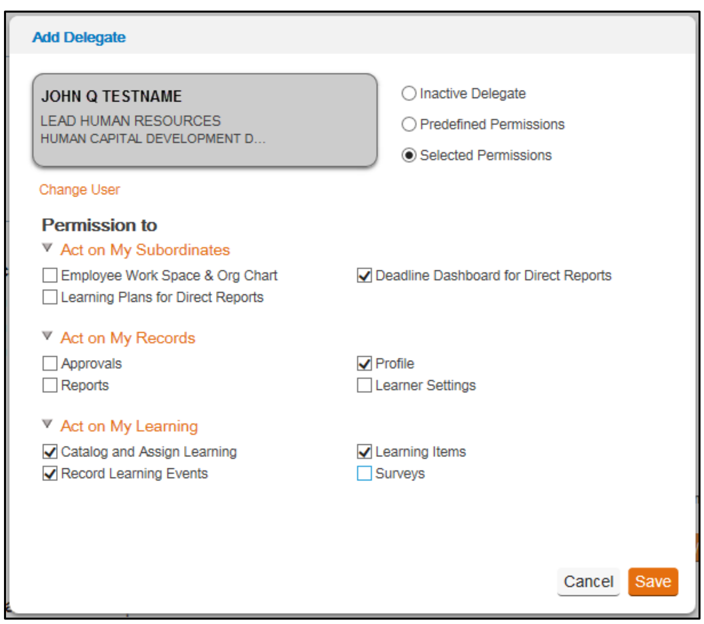
Figure 7: Add Delegate Search User Field Populated and Showing Matching User

4. Select the user you wish to assign as delegate.

5. In the **Add Delegate** window, select the level of permissions for the delegate. The following are the available permissions options:

   - **Inactive Delegate:** disables permissions, but retains the Selected Permissions setting for future use.
   - **Predefined Permissions:** grants the delegate the same level of permissions as the Manager.
   - **Selected Permissions:** allows you to select specific permissions to be delegated from a list of permissions. The following shows the Add Delegate window with several Selected Permissions options checked:

Figure 8: Add Delegate Window Showing Selected Permissions Options

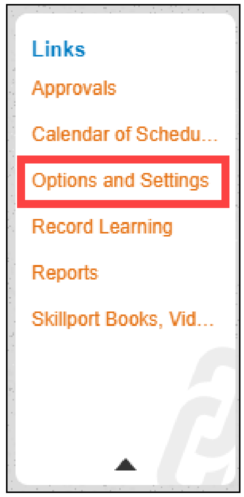


6. Click the **Save** button. The delegate now has the selected permissions that were assigned.

Editing a Delegate

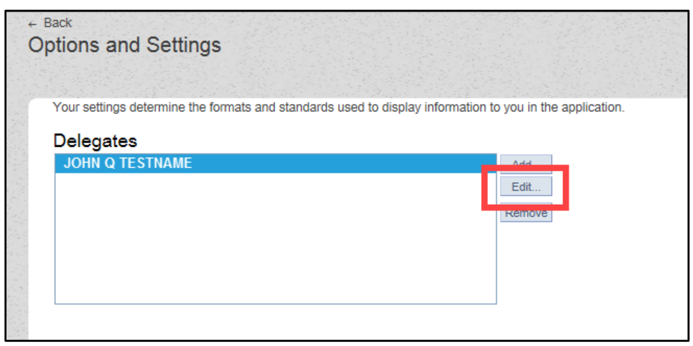
1. From the **My Learning (SATERN) page**, in the **Links** tile, click the **Options and Settings** link as shown in the following figure:

Figure 9: Links Tile Showing Options and Settings Link



2. In the **Delegates** area, select the delegate.
3. Click the **Edit** button as shown in the following figure:

Figure 10: Delegates Screen Showing Edit Button



4. From the **Edit Delegate** screen, select the appropriate new permissions. The following are the available permissions options:
   - **Inactive Delegate:** disables permissions, but retains the Selected Permissions setting for future use.
   - **Predefined Permissions:** grants the delegate the same level of permissions as the Manager.
   - **Selected Permissions:** allows you to select specific permissions to be delegated from a list of permissions.
5. Click the **Save** button.

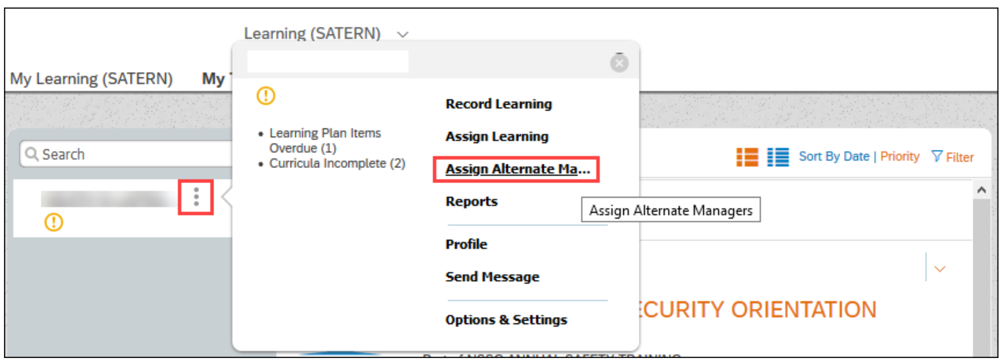
Task C – Setting Alternate Managers

The Alternate Manager feature is a great way to give learning manager responsibility to someone else in your organization on a subordinate-by-subordinate basis. It is best used when an employee is temporarily joining another team or project that has learning activity involved. The alternate manager should be assigned by the primary manager.

To assign an alternate manager:

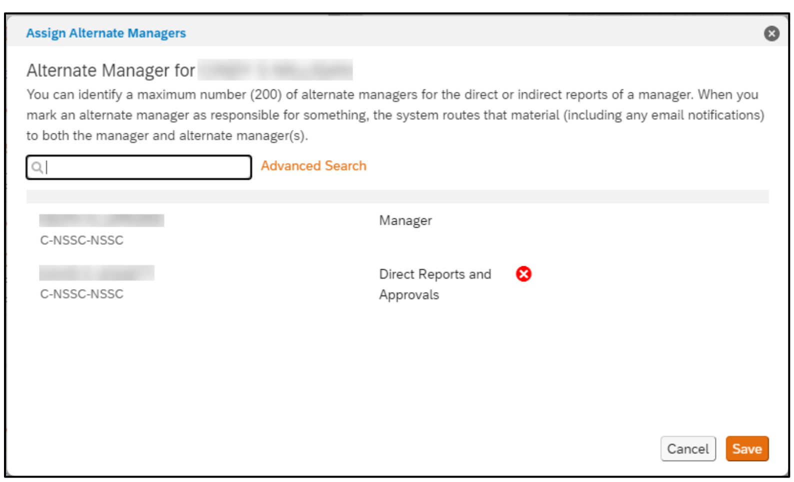
1. From the **My Learning (SATERN)** page, click the **My Team** tile or the **My Team** link at the top of your screen.
2. Next to the desired employee's name, click the **More Options Vertical** icon.
3. Click the **Assign Alternate Managers** option.

Figure 11: My Team Screen Showing More Options Vertical Icon and Assign Alternate Managers Option



4. In the **Search** field, type the name of the alternate manager, select the name, then click the **Save** button.

Figure 12: Assign Alternate Managers Screen with Alternate Manager Selected



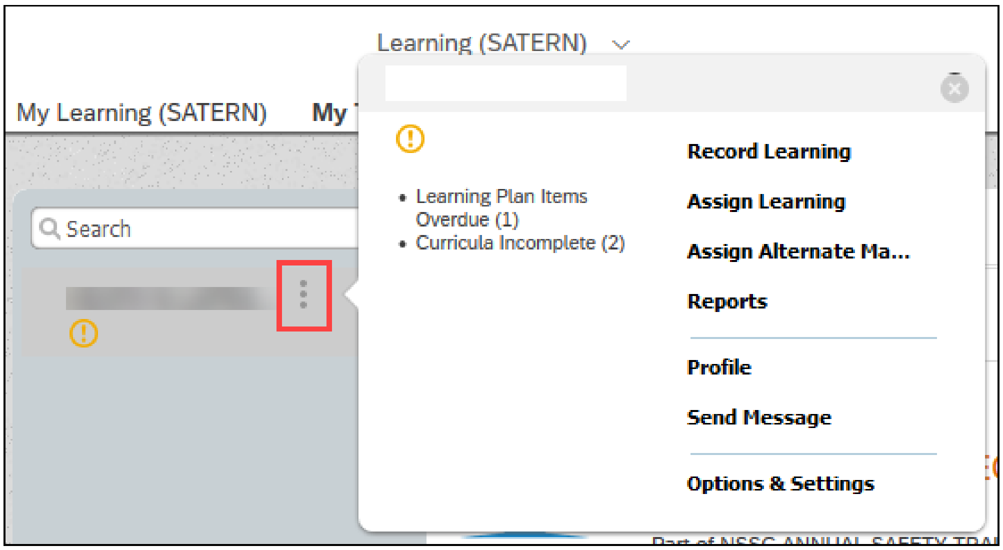
The subordinate is added to the alternate manager's My Team screen.

Task D – Viewing and Taking Actions in an Employee's Account

From the **My Team** page, you can view employees who report directly to you as well as those who report to your employees. Information about the employees is available by selecting the employee's name from the list or by searching for the employee.

After clicking the employee's name, the right panel of the screen shows the employee's Learning Plan. If you click the **More Options Vertical** icon, the employee's available action options are displayed as shown in the following figure:

Figure 13: My Team Screen Showing More Options Vertical Icon



Taking Action in an Employee's Account

From the employee's **More Options** screen, you have access to the following:

- Record Learning
- Assign Learning
- Assign Alternate Managers
- Reports

Viewing an Employee's Profile

From the employee's **More Options** screen, click the **Profile** link to access the employee's personal information.

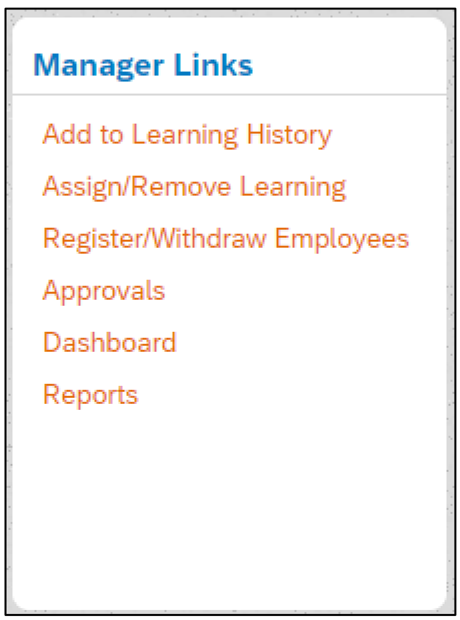
Task E – Using Manager Links

To make changes to an employee's account, use the following **Manager Links** options:

- Add to Learning History
- Assign/Remove Learning
- Register/Withdraw Employees
- Approvals
- Dashboard
- Reports

The following screen shows the **Manager Links** tile:

Figure 14: Manager Links Tile

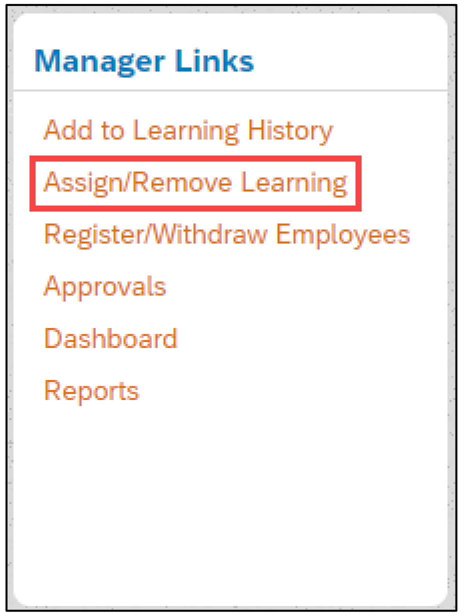


Assigning Learning

To assign items or curricula:

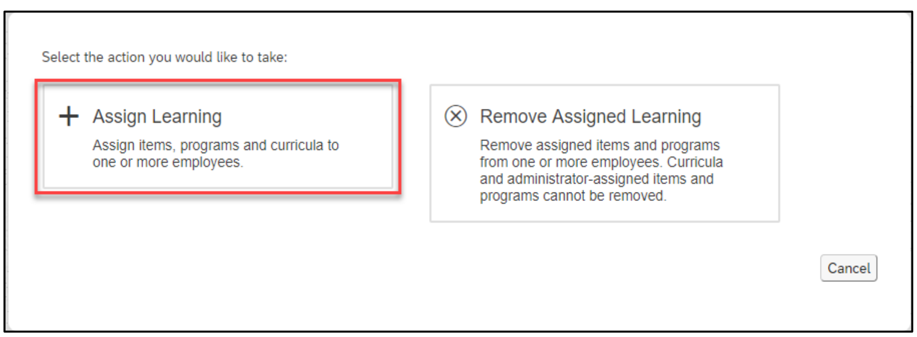
1. From the **Manager Links** tile, click the **Assign/Remove Learning** link.

Figure 15: Manager Links Tile Showing Location of Assign/Remove Learning Link



2. Click the **Assign Learning** option.

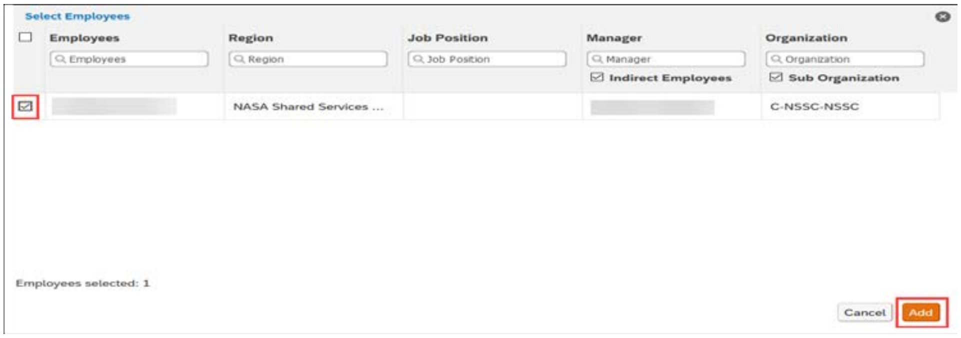
Figure 16: Location of the Assign Learning Option



3. Click the **Add** button next to **Employees**.

4. Place a checkmark in the checkbox next to the employee's name to choose the employee(s) you want to manage, then click the **Add** button.

Figure 17: Select Employees Screen

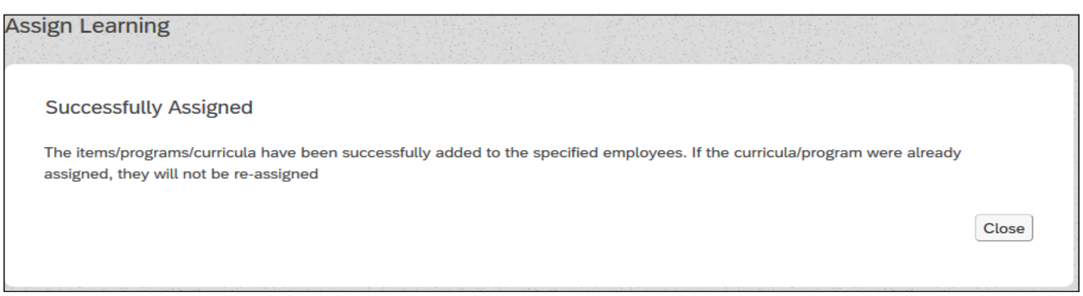


5. Click the **Add** button next to Items, Programs, and Curricula.
6. In the **Keywords** field, type the item or curriculum you want to add to the employee's learning plan.
7. Click the **Search** button.
8. Click the **Select** link to add the items or curricula you want to add to the employee's learning plan.
9. Close the Search window, and add a required date if desired.

> **Note**: To add multiple items, repeat the search steps and add additional courses to the list.

10. Click the **Continue** button to move to the **Confirm Details** screen and then click the **Assign Learning** button.
11. Click the **Close** button. To verify your items have been successfully added to the employee's learning plan, the following **Success** information is displayed.

Figure 18: Success Status Message for Adding Items to Specified Learners

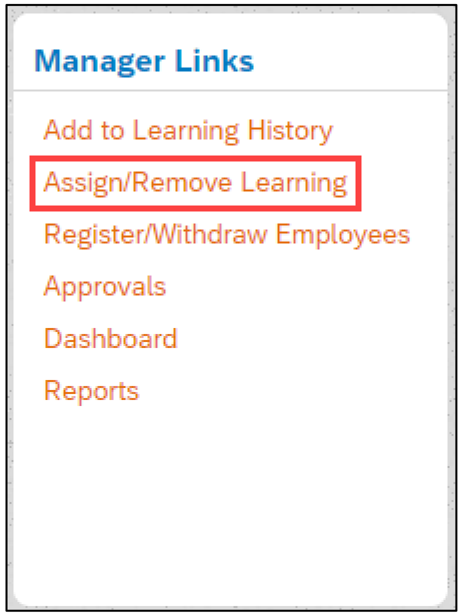


Removing Learning

To remove items or curricula:

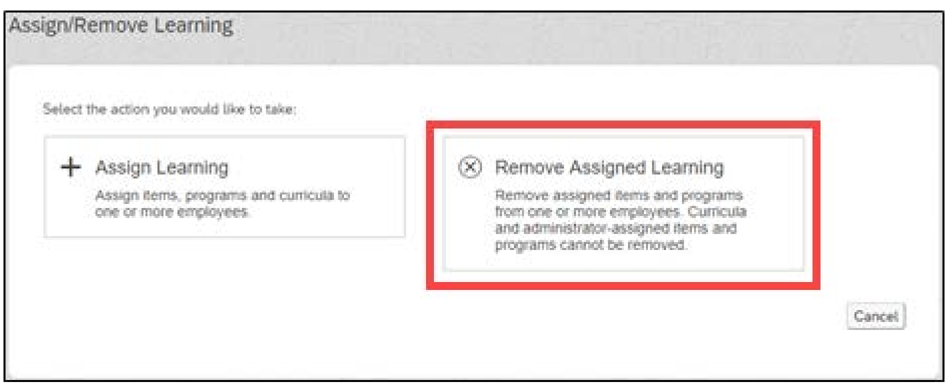
1. From the **Manager Links** tile, click the **Assign/Remove Learning** link.

Figure 19: Manager Links Tile Showing Location of Assign/Remove Learning Link



2. Click the **Remove Assigned Learning** button.

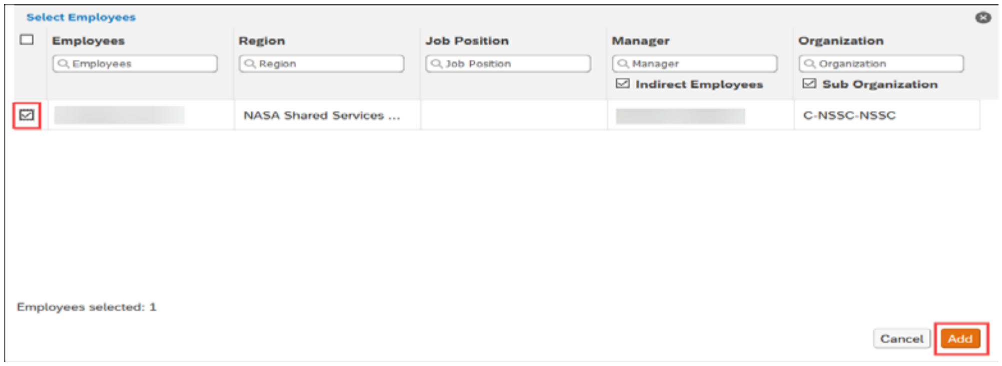
Figure 20: Location of the Remove Assigned Learning Button



3. Click the **Add** button.

4. Place a checkmark in the checkbox next to the employee's name to choose the employee(s) you want to manage, then click the **Add** button.

Figure 21: Select Employees Screen



5. Click the **Next** button.
6. In the **Keywords** field, type the items or curricula you want to remove from the employee's learning plan.
7. Click the **Search** button.
8. Click the **Select** option on the items that you want to remove from the employee's learning plan, and close the window.
9. Click the **Continue** button.

> **Note**: To remove multiple items, repeat the search steps and add additional courses to the list.

10. Verify the information on the **Confirm Details** page and then click the **Remove Learning** button.

> **Important**: Managers will not be able to remove items or curricula that are assigned by an administrator. Managers can remove items that are self-assigned only.

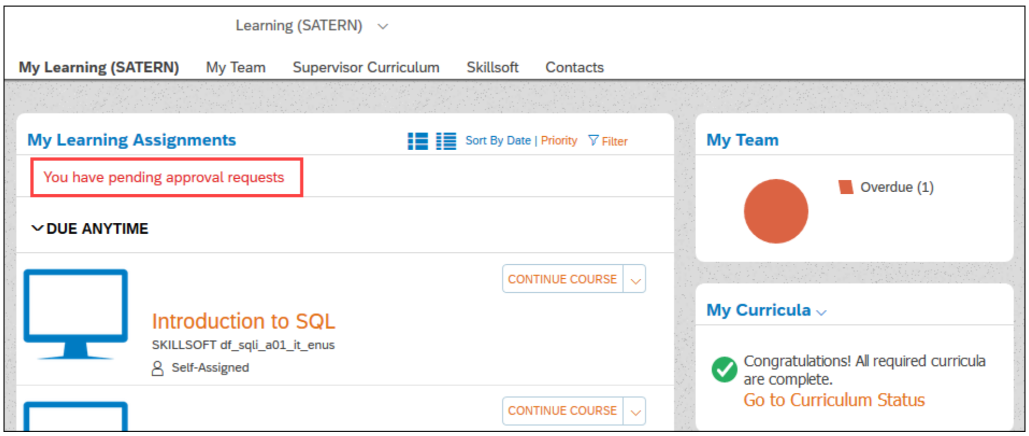
Approving Internal Training Requests

Some SATERN learning items may require your approval. You may be responsible for approving or denying internal training requests from direct-report employees.

To approve an internal training request:

1. From the **My Learning (SATERN)** page, if you have pending approval requests, you will see a message below the **My Learning Assignments** heading as shown in the following figure:

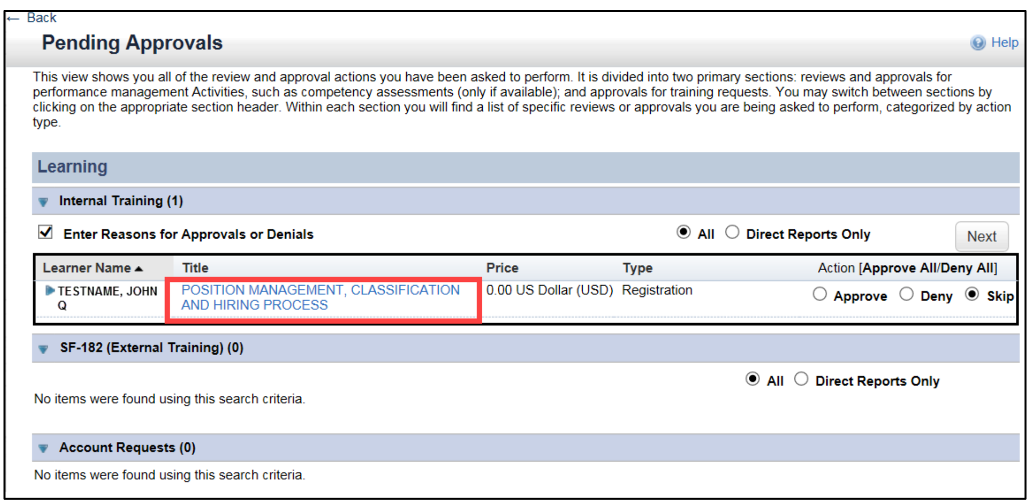
Figure 22: Location of Pending Approval Requests Message



2. From either the **Links** tile or the **Manager Links** tile, click the **Approvals** link.

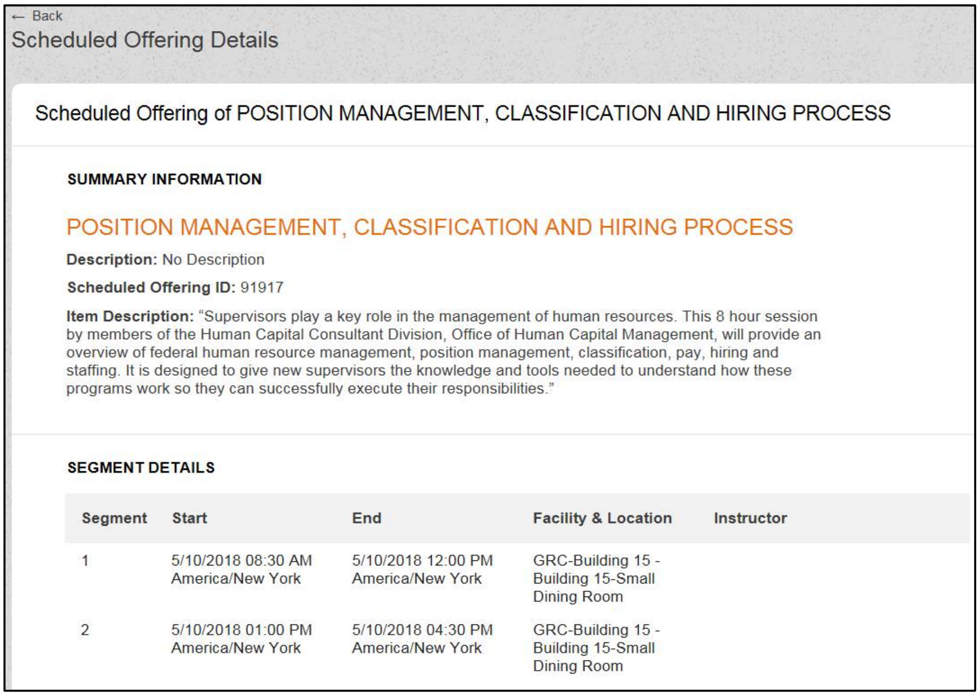
3. Click the scheduled offering **Title** link to review the course description.

Figure 23: Pending Approvals Screen Showing Scheduled Offering Title Link



4. Review the scheduled offering to determine if the course is appropriate for the learner. The following figure shows a sample scheduled offering:

Figure 24: Scheduled Offering Details Screen



5. Click the **Back** link.

6. Decide whether to approve, deny, or skip. Click the radio button next to the action you would like to take.

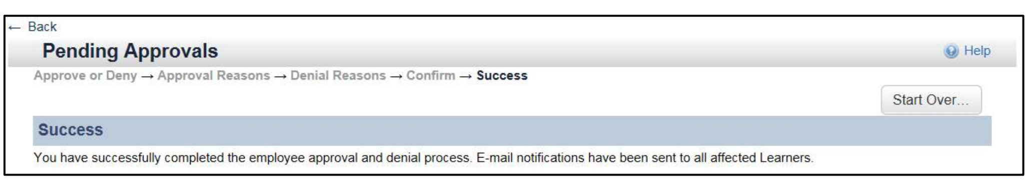
7. Click the **Next** button.

8. Enter an Approval Reason (optional).

9. Click the **Next** button.

10. Click the **Confirm** button. To verify your decision was completed, the following Success message is displayed:

Figure 25: Success Message



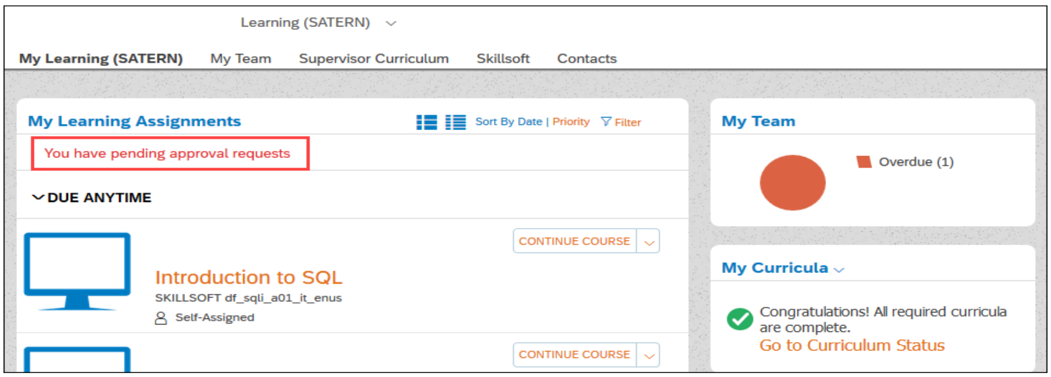
Approving External Training Requests

Some SATERN learning items may require your approval. You may be responsible for approving or denying external training requests from direct-report employees.

To approve an external training request (Standard Form (SF) 182):

1. From the **My Learning (SATERN)** page, if you have pending approval requests, you will see a message below the **My Learning Assignments** heading as shown in the following figure:

Figure 26: Location of Pending Approval Requests Message



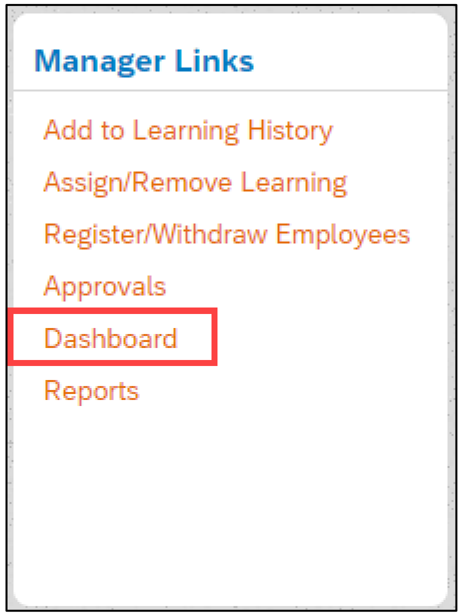
2. From either the **Links** tile or the **Manager Links** tile, click the **Approvals** link.
3. On the **Pending Approvals** page, locate the request to approve.
4. Click the **Approve** radio button.
5. Click the **Next** button.
6. Enter an Approval Reason (optional), if necessary.
7. Click the **Next** button.
8. Review the displayed information, and click the **Confirm** button to complete the process.

Viewing the Dashboard

As a manager, you can view the status of your employees' learning progress. The dashboard provides a quick look at the status of direct reports. To access the dashboard:

1. From the **Manager Links** tile, click the **Dashboard** link as shown in the following figure:

Figure 27: Manager Links Tile Showing Location of Dashboard Link

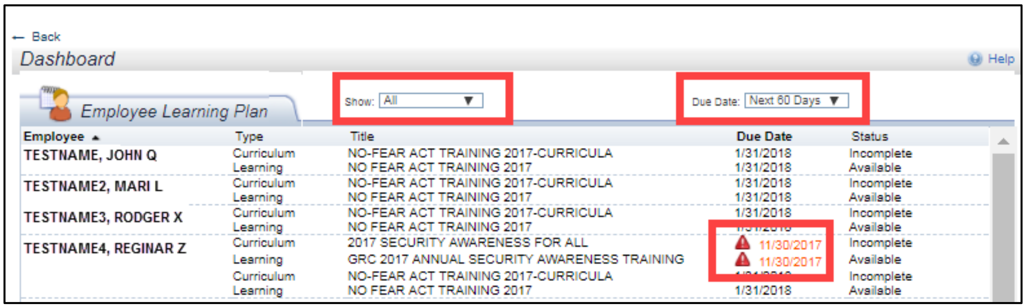


2. To view upcoming or overdue actions for all your direct reports, use the following sort and filter options:
   - You can sort the list by using the **Due Date** drop-down menu:
     - Overdue items
     - Items due in the Next 30 Days
     - Items due in the Next 60 Days
   - You can further sort the list by using the **Show** drop-down menu:
     - All items
     - Learning
     - Curricula

> **Note**: Past due items are identified by a red caution symbol in the **Due Date** column.

The following figure shows the Dashboard screen with the filters and Due Date column warnings:

Figure 28: Dashboard Screen Showing Locations of Fields and Due Date Warnings



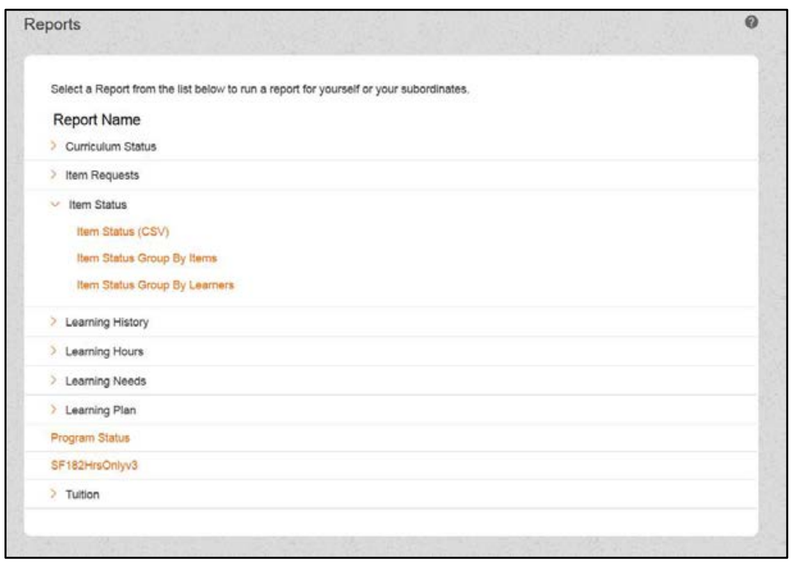
Running Reports

SATERN generates reports based on the data in the system.

To run reports:

1. From the **Manager Links** tile or the **Links** tile, click the **Reports** link. The Reports screen is displayed as shown in the following figure:

Figure 29: Reports Screen



The figure is provided as an example, but your options may differ from those shown. The reports available to you are based on your workflows and permissions.

2. Click the **Expand** icon next to the category you would like to view. (If your screen does not show the Expand icons, please try using a different browser.)

3. Click the report you would like to run.

4. Enter the appropriate report criteria.

> **Note**: Managers may choose to run reports for Self, Direct Subordinates, All Subordinates, or All (everyone including themselves). The report title indicates if it is run as a CSV file and opens in Excel. Others will open in a browser or other option available in the Report Destination field.

5. Click the **Run Report** button.