

# Performance Analysis: Step-By-Step Guide For 1<sup>st</sup> Time Users

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## 1. Introduction

A step-by-step process is presented to assist analysts in analyzing performance deficiencies, detecting the source of the problem, identifying solutions – including training – that can produce the desired level of productivity and recommending actions to maximize the return on investment (ROI). For in depth information, please refer to Chapters 4 to 8 of ADVISOR “Improve Human Performance” User Guide. Remember that context sensitive help for each screen is also available by clicking on Help (button).

If the organization/units missions/goals, job profiles, tasks and objectives have been setup, (using Align Training with Organizational Goals module), then proceed to Step 15 on page 7. Otherwise, commence with Step 1.

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### 3. Setup Projects

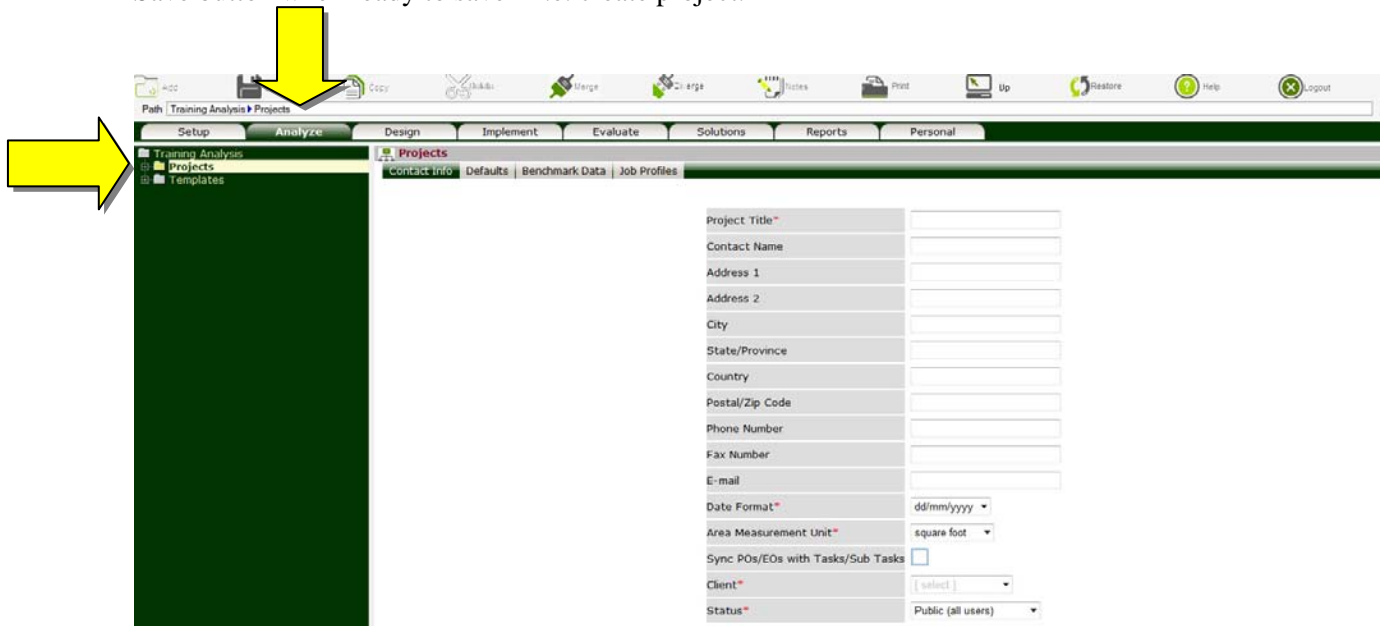
To determine how much resources should be allocated to a perceived problem/opportunity, the scope of the problem/opportunity should be defined and assumptions validated. In other words, who initiated the request for analysis or training, and for what reason? Based on circumstantial evidence and constraints, the validity of the request can be evaluated, cost of problem or value of opportunity estimated and need for further analysis confirmed. Moreover, the minimum (best-case scenario) and maximum (worst-case scenario) monetary impact of the problem or opportunity on performance can be forecasted.

If the project structure has been setup, then proceed to Section 4. Setup Missions/Goals. Otherwise, the structure of internal (i.e., business units) as well as external clients – including hierarchy – can be setup as follows:


Step 1. To create a new Project, click on the  **Projects** folder.

Step 2. Click on Add (button) (top left corner).

Step 3. Input the Project Title, Contact Name and other info. Data required by ADVISOR is identified by a red asterisk (\*). Next, click on the [Defaults] tab to specify Annual Productive days, Working Hours per Day and Fringe Benefits Factor for the Client; and then the [Benchmark Data] tab to specify # of Employees in Division, Annual Payroll of Employees, # of Employees Trained [per year], # of Trainers as well as the Annual Training per Employee [hours]. Click the Save button when ready to save – i.e. create project.



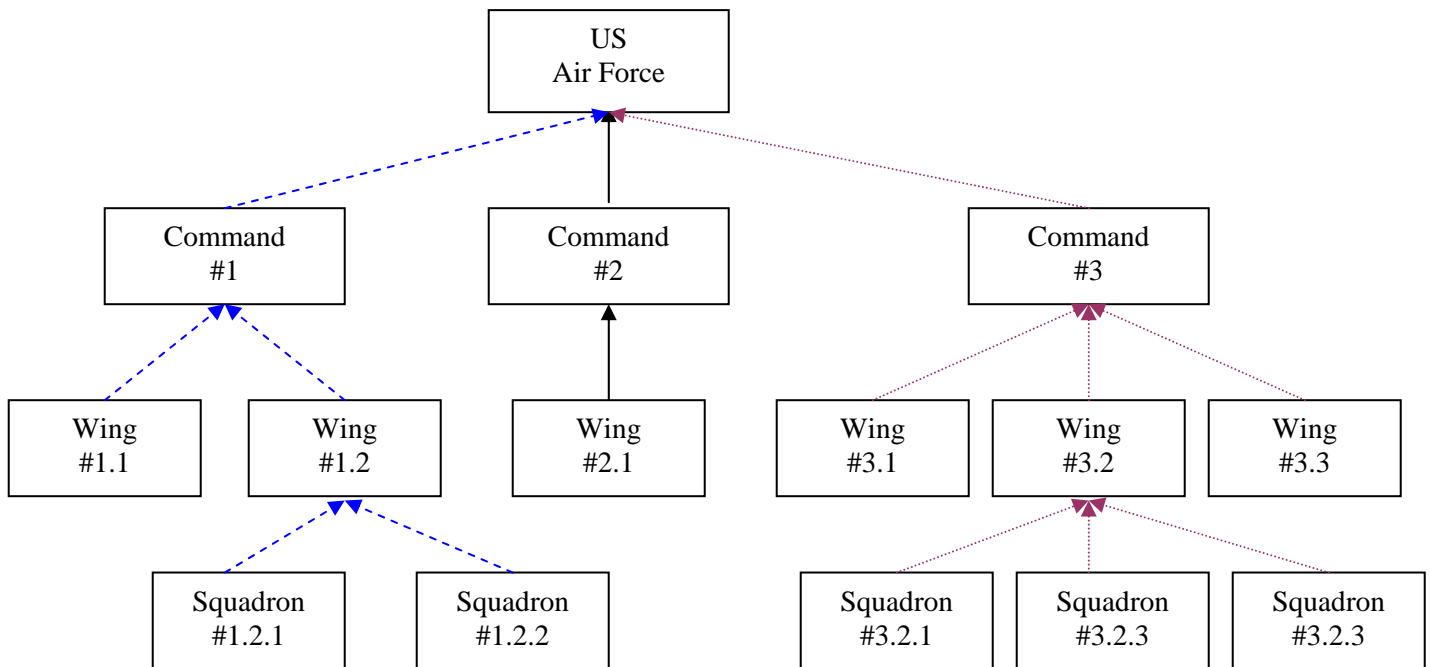
Note:

- To edit an existing project, click on the  **Projects** folder then click on the project's name. Make required changes and click Save.
- If Job Profiles (Positions) have been defined and made Public by other users a [Job Profiles] tab will also appear. To copy a Job Profile (Position) to the project, click on the [Job Profiles] tab, place checkmark next to the desired job and click Save.

- You may also share your analysis with colleagues (i.e., Users assigned to the same Client) by clicking on the [Sharing] tab, placing checkmarks next to their names and clicking Save.

Step 4. ADVISOR can easily mirror the hierarchy of a project. In other words, the project may be divided into multiple segments and the impact of the missions/goals within each segment on the project can be established. For example, if we are assessing the impact of missions/goals at the Squadron level on the Air Force, the Air Force project can be divided into multiple segments representing the Commands, and each Command in-turn subdivided into Wings and each Wing in-turn divided into Squadrons. The impact of missions/goals at each level on parent level can also be defined.

To set-up a Segment for a Project, click on the **Segments** folder under the **Projects** folder, and then click on the Add button. You will be prompted for the Project (Segment) Title, Contact Name and other info as indicated in the Step 3.



## 4. Setup Missions/Goals

To identify and prioritize the missions/goals for the project, as well as how the segment missions/goals support the project. If projects' goals have been setup, then proceed to Section 5. Setup Job Profiles. Otherwise, missions/goals can be setup as follows:

Step 5. Click on the **Mission Analysis** folder under the **(project)** node.

Step 6. Click on Add (button) (top left corner).

Step 7. Input the Mission/Goal Title, Importance, Standard (i.e., desired performance) as well as other relevant data and click Save – i.e., create mission/goal.



### Note:

- To edit an existing mission/goal, click on the **Mission Analysis** folder then click on the mission/goal. Make the required changes and click Save.
- The significance of each mission/goal is indicated in the Importance field. The relative weight of each mission/goal is assigned as follows: critical=4, very important=3, important=2 and somewhat important=1; and can be used to identify the most critical tasks, knowledge and skills and in-turn where money and resources should be allocated.
- The performance criterion for evaluating whether mission/goal is successfully achieved is specified in the Standards field. The statement should:
  - Indicate how well the mission/goal must be performed.
  - Include sufficient details to accurately communicate the requirement.
  - Be objective, observable and measurable.
  - Describe an acceptable product, process or both. Product standards are described in terms of quantity, accuracy, tolerances, completeness, format, errors and clarity. Process standards are described in terms of sequence, completeness, accuracy and speed of performance.
- The impact of segments mission/goal on project missions/goals is indicated under the [Mission Impact] tab.

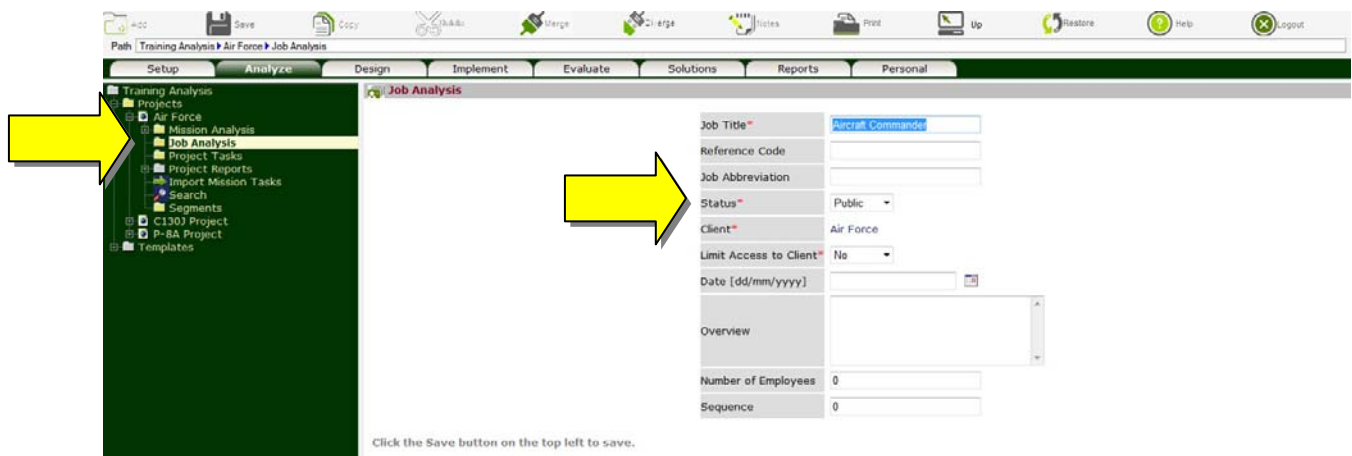
## 5. Setup Job Profiles (Positions)

Job Profiles (Positions) needed to achieve projects missions/goals are identified in this step. The tasks for each Job Profile can be assembled from core competencies as well as Individual Tasks needed to achieve the projects missions/goals (Section 4). If Job Profiles have been setup, then proceed to Section 6. Setup Tasks. Otherwise, Job Profiles can be setup as follows:

Step 8. Click on the **Job Analysis** folder under the **(project)** node.

Step 9. Click on Add (button) (top left corner).

Step 10. Input the Job Title, a brief overview as well as other relevant data and click the Save button to create the job profile.



### Note:

- To facilitate the analysis process, public Job Analyses (defined under Status field) are made available to other users (analysts) under the [Job Profiles] tab. Users may copy relevant analysis (including tasks, performance/enabling objectives, knowledge/skills, etc.) to their own projects. Note that making Job Analysis Public does not imply that others can make changes to your analysis – it simply implies that they can copy and reuse.
- The profile of each job, including financial data as well as instructional design characteristics that may impact the effectiveness of alternate delivery media can also be specified in this section by clicking on the **Financial Data**, **Characteristics**, or **Attitude** nodes, completing relevant sections and clicking Save.

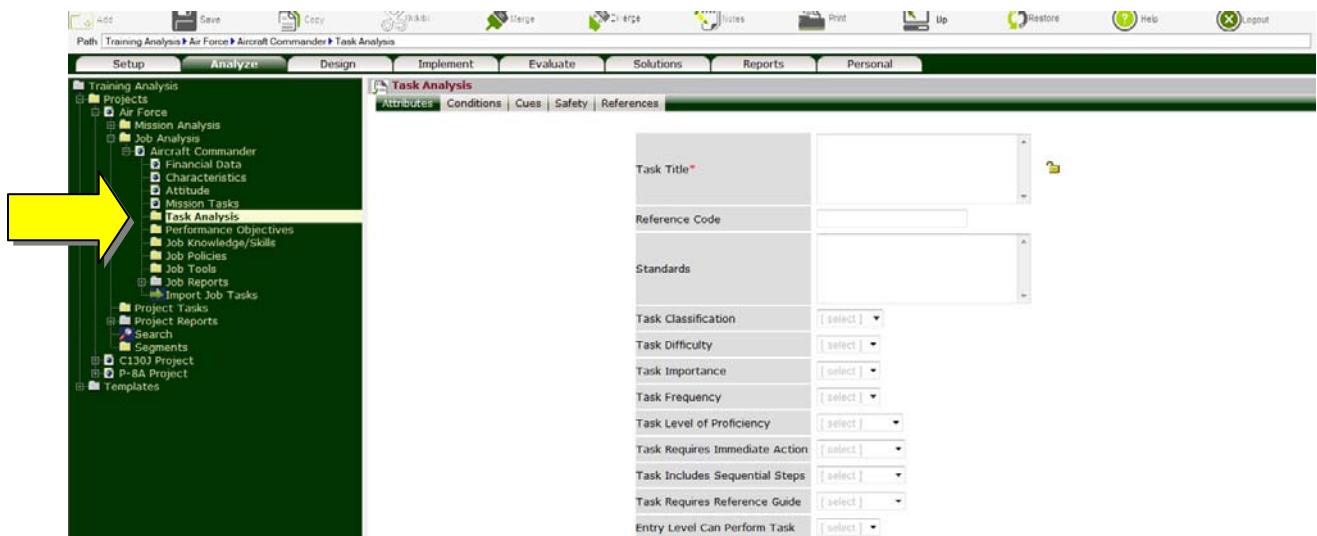
## 6. Setup Tasks

If Tasks have been setup, then proceed to Section 7. Define Performance and Enabling Objectives. Otherwise, the Tasks can be setup as follows:

Step 11. Click on the **Task Analysis** folder under the **(job)** node.

Step 12. Click on Add (button) (top left corner).

Step 13. Input the Task Title, Difficulty, Importance, Frequency as well as other attributes. Next, click on the [Conditions], [Cues] and [Safety] tabs and complete. Click the Save button when ready to save – i.e., create task.



### Note:

- Based on Task's Difficulty, Importance and Frequency (DIF) model, Task Priority (High, Medium or Low) and Training Requirements (Over Train, Train or No Train) are determined and presented under the **Training** node under each **(task)**. You may of course, override system's recommendations.
- Sub Divide Tasks: A Task can also be divided into multiple levels – i.e., Sub Tasks, Steps and Sub Steps. Since Individual Tasks require one individual to complete, each Task can only be assigned as a single unit (including all Sub Tasks) to a single Job Profile (Position). In other words, if a Task is divided into Sub Task A and Sub Task B, you cannot assign Sub Task A to Pilots for example, and Sub Task B to Maintainers.
- Search. To facilitate the analysis, a [Search] tab is presented on the **Task Analysis** folder. You can search for Tasks under Missions, Jobs or by Keyword. To copy, place checkmarks next to the desired Tasks and click Save. All Sub Tasks as well as Knowledge and Skills associated with the selected Task are also copied.
- If References have been defined under the **Master References List** folder under the **Templates** folder (Chapter 9 of “Align Training with Organization Goals” User Guide), a [Reference] tab will also appear after the [Safety] tab – to link Tasks to specific mandate, requirement, manual, etc., and in-turn document the reasoning behind the Task.

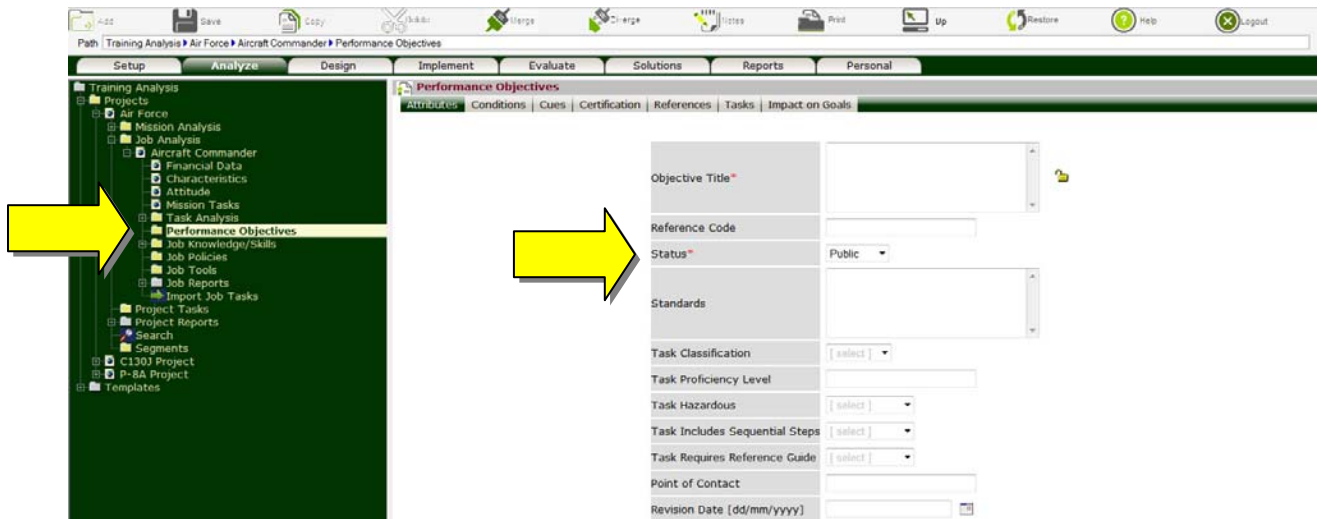
## 7. Define Performance and Enabling Objectives

If Performance and Enabling Objectives have been setup, then proceed to Section 8. Identify Performance Gap. Otherwise, the Objectives can be setup as follows:

Step 14. Click on the **Performance Objectives** folder under the **(job)** node.

Step 15. Click on Add (button) (top left corner).

Step 16. Input the Performance Objective, Standard (i.e., desired performance) as well as other attributes. Next, click on the [Conditions], [Cues], [Certification], [Tasks] and [Impact on Goals] tabs and complete. Click on Save button when ready to create the objective.



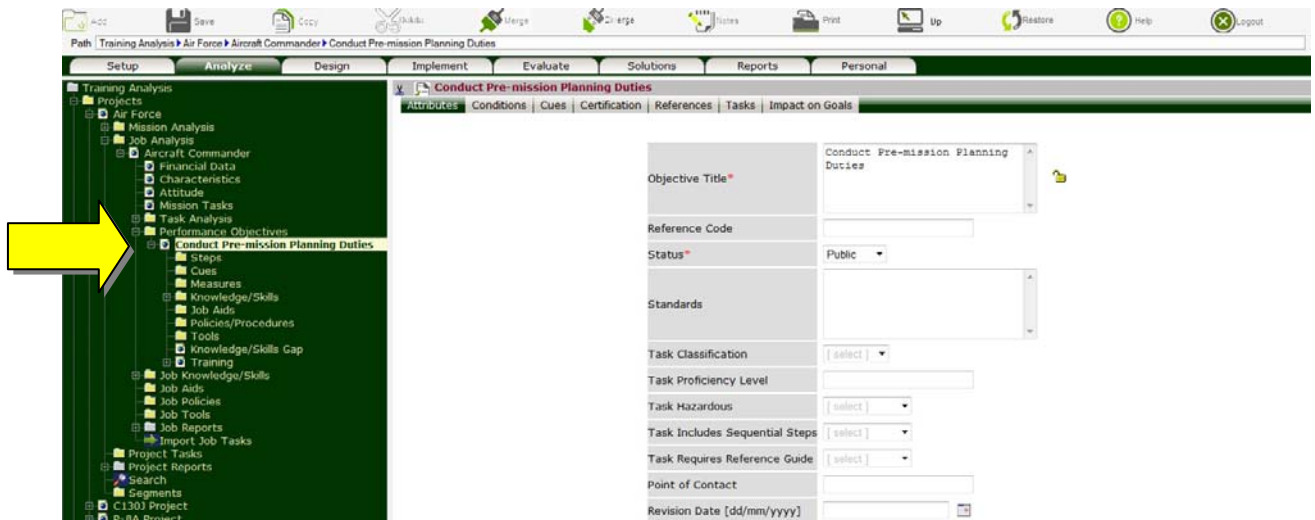
### Notes:

- Objective Priority and Training Requirements are dictated by Tasks and Sub Tasks that the Objective supports – i.e., linked to under the [Tasks] tab. They are presented under the **Training** node under each **(objective)**.
- **Sub Divide Objective:** Performance Objective can also be divided into Enabling Objectives. Each Performance Objective can only be assigned as a single unit (including all Enabling Objectives) to a single Job Profile (Position). In other words, if a Performance Objective is divided into Enabling Objectives A and B, you cannot assign Enabling Objective A to Pilots for example, and Enabling Objective B to Maintainers.
- **Status:** To facilitate data sharing and minimize effort required to analyze Objectives, a Search function is provided to help analysts locate and copy existing Performance Objectives. To allow analysts to search for and copy Objectives that you have created (but not edit or delete), classify the objective as Public under the Status field. Otherwise, the Performance Objective can be classified as Private and will not in this case be accessible by the Search function.



- **Impact on Goals** fields indicate the significance of each Objective. The relative weight of each objective is assigned as follows: critical=4, very important=3, important=2 and somewhat important=1. Based on missions/goals and objectives weights, the relative impact of each objective and in-turn knowledge and skill is computed. In other words, which knowledge and skills are most critical and have the greatest impact on missions/goals.
- **Auto Generate.** Although Scalar diagrams may be used to extract Performance and Enabling Objectives from Tasks and Sub Tasks, for simple analysis where Performance Objectives have a one to one relationship with Tasks, the [Auto Generate] tab on the **Performance Objectives** folder may be used to generate Performance and Enabling Objectives (including Knowledge and Skills) from Tasks and Sub Tasks – by placing checkmarks next to the desired Tasks and clicking Save.
- **Search.** To facilitate the analysis, a [Search] tab is also presented on the **Performance Objectives** folder. You can search for Performance Objectives under Jobs or by Keyword. To copy, place checkmarks next to the desired Performance Objectives and click Save. All Enabling Objectives as well as Knowledge and Skills associated with the selected Performance Objectives are also copied.
- If References have been defined under the **Master References List** folder under the **Templates** folder, a [Reference] tab will also appear after the [Certification] tab – to link Objectives to specific mandate, requirement, manual, etc. By establishing these links, in addition to documenting the reasoning behind the Objective, analysts can quickly identify which Objectives (including Knowledge, Skills, Attitudes, Job Aids, Policies and Tools) are affected – should there be a change in a specific mandate, requirement or manual.

Step 17. The following folders may also be presented under each **(task)**: **Steps**, **Cues**, **Measures**, **Knowledge/Skills**, **Job Aids, Policies and Tools**. To add a new Step, Cue or Measure for an Objective, click on the corresponding folder, **Steps**, for example, then click on Add (button), input the required fields and click Save.





## 8. Identify Performance Gap

To identify the gap between desired and actual performance:

Step 18. Click on [**Evaluate**] tab.

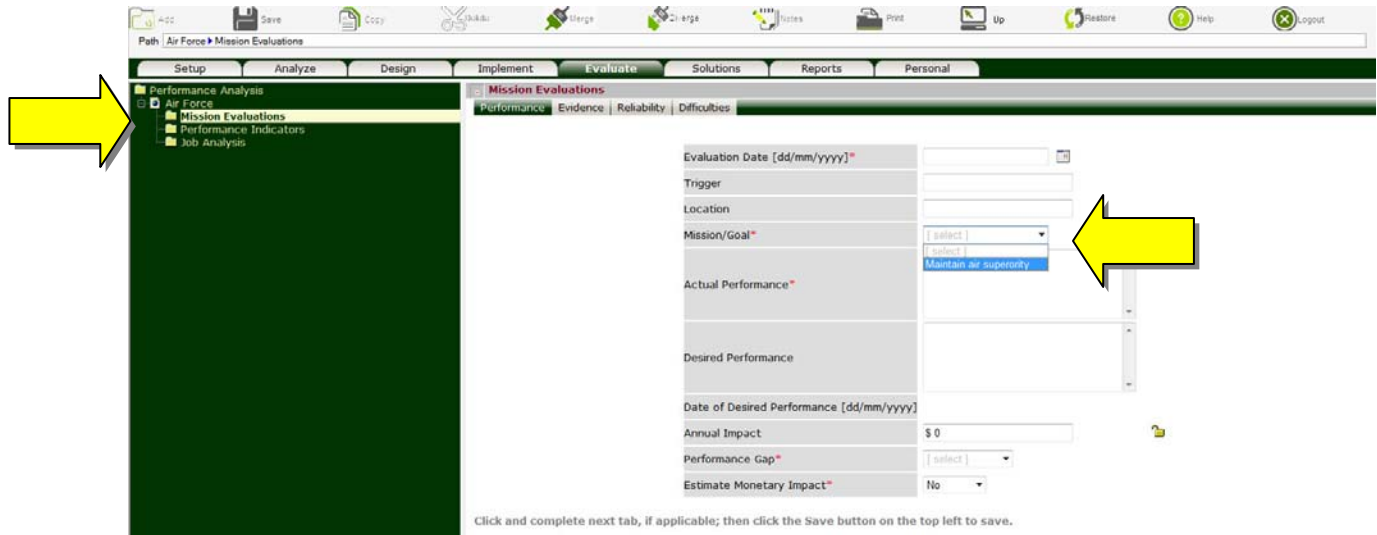
Step 19. Select Project(s) to be investigated by placing checkmarks next to their title and click Save.



Step 20. If performance deficiency is originating from a specific goal, click on **Mission Evaluation**.



Step 21. Click on Add (button) (top left corner).

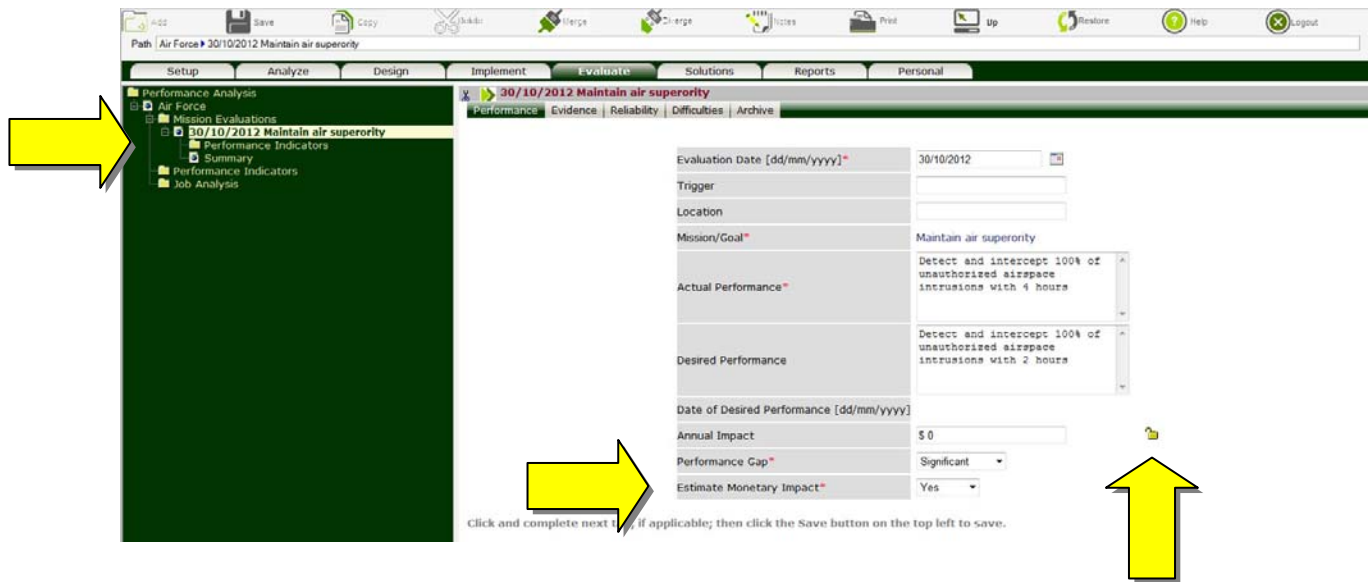
Step 22. Select Mission/Goal under investigation and input the Evaluation Date, Trigger (i.e., reason for initiating the assessment), Actual Performance, Annual Monetary Impact (if available), whether the Performance Gap is Significant, and whether Performance Indicators are needed to estimate the monetary impact. Next, click on [Evidence] tab and complete, followed by [Reliability] and [Difficulties] tabs. Click on Save to setup the evaluation.



### Notes:

- To facilitate the identification of performance gap, the Actual Performance should be reported in a similar format to Desired Performance.

- If the Monetary Impact of the problem or opportunity is:
  - ❑ Available. Then input the value in the Annual Impact field and lock .
  - ❑ Not available. Then use the performance measures defined under the **Performance Indicators** folder (Sections 9 & 10) to estimate the Monetary Impact. In this case:
    - ✍ Yes should be selected for Estimate Monetary Impact field. This will in-turn display the **Performance Indicators** folder and **Summary** node under the **(Mission Evaluation)** node for computing the impact; and
    - ✍ Annual Impact field should remain unlocked  - to automatically retrieve and report the average monetary value computed under the **Summary** node.



- If the Performance Gap is Acceptable or Not Applicable, then there is no need to carry on further with the analysis.
- If Performance Gap for a Mission/Goal is significant, then relevant Tasks for all Job Profiles that support the Mission/Goal are automatically displayed under **Performance Analysis** folders under each **(job)** under the **Job Analysis** folder. To find out which Task(s) are causing the performance deficiency and identify plausible solutions, proceed to Section 12.

## 9. Estimate Monetary Value

To estimate the monetary impact of a problem or an opportunity:


Step 23. Click on the **Performance Indicators** folder under the **(mission)** node to display Performance Measures – the Performance Measures are created under the **Performance Indicators** folder (Section 10).

Step 24. Place checkmark next to relevant measures and click Save. Selected Performance Measures are presented under the **Performance Indicators** folder.



Step 25. Click on a Performance Measure to display relevant fields, input the required data and click Save to compute the minimum and maximum monetary impact of this measure on the problem or opportunity.

### Notes:

- The results of all Performance Measures are compiled under the **Summary** node.
- The average monetary impact  $[(\text{minimum} + \text{maximum}) / 2]$  of all Performance Measures is transferred to the Annual Impact field under in the **(mission)** node, if unlocked .

## 10. Create Performance Measures

To assist analysts in estimating the monetary impact of a problem or opportunity, monetary measures can be defined, as follows:

Step 26. Click on the **Performance Indicators** folder under the **(project)** node.

Step 27. Click on Add (button) (top left corner).

Step 28. Input the Performance Measure Title and Formula used to compute monetary value. Click on Save to create a performance measure.



### Notes:

- Formula is needed to capture the monetary value of a Performance Measure. The Formula should be written in a generic format to facilitate computations under various scenarios. For example, to the annual monetary impact of improving aircraft inspections can be measured as follows:



$$\text{Inspections} * \text{Technicians} * \text{Value} * \text{Improvement} / 100$$




#### Where:

- Inspections = Average # of Inspections Handled per Technician [per year]
  - Technicians = # of Individuals that Inspect Aircrafts
  - Value = Average Cost [per inspection]
  - Improvement = Potential Improvement [%]
- The following operators may be used in composing a formula: "+" [Add], "-" [Subtract], "/" [Divide], "\*" [Multiple] and "(" [Group].
  - The formula should be presented as one string. In other words, should not include spaces.

Step 29. To provide a brief description for the variables in the formula, click on the **Variables** node under the **(Performance Measure)** node, input the description and click Save.

## 11. Identify Potential Sources to the Problem

To zero in on the source of the problem, all Tasks that impact the problem/opportunity should be identified along with Jobs (Positions) responsible for performing the Tasks. If Job, Task and Objective Analysis (Sections 5, 6 & 7) have been conducted, you can easily identify the Objectives under each Job that impact the problem or opportunity by clicking on the  **Goals Top Down View** node under the  **Project Reports** folder.

Note: If the Performance Gap for a Mission/Goal is significant (Section 8, Step 22), then relevant Tasks for all Jobs (Positions) that support the Mission/Goal are automatically presented under the  **Performance Analysis** folders under each  (job) under the  **Job Analysis** folder.



Once relevant Tasks have been identified, you can proceed to the next step (Section 12) – to assess the ability of each job (position) to adequately perform the Tasks.

## 12. Evaluate Tasks Performance

To identify the gap between desired and actual task performance:

Step 30. Click on the  **Job Analysis** folder under  **(project)** node.

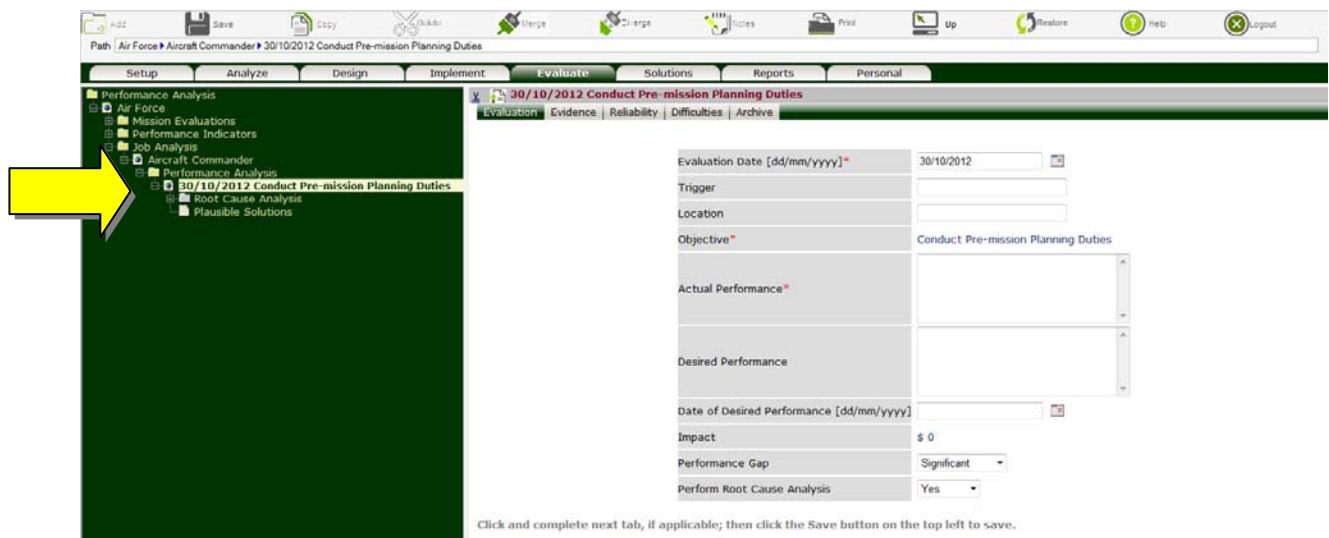
Step 31. Select Jobs (Positions) to be investigated by placing checkmarks next to their title and click Save to display.

Note: If Performance Gap for a Mission/Goal is significant (Section 8, Step 22), then all Jobs that support the Mission/Goal are automatically selected/displayed – i.e., no need to add.


Step 32. Click on the  **Performance Analysis** folder under  **(job)** node.

Step 33. Click on Add (button) (top left corner).

Step 34. Select the Task to be investigated and input the Evaluation Date, Trigger (i.e., reason for initiating the assessment), Location, Actual Performance Date of Desired Performance, whether the Performance Gap is Significant and whether Root Cause Analysis is needed. Next, click on the [Evidence] tab and complete, followed by [Reliability] and [Difficulties] tabs. Click on Save when ready to setup the evaluation.



### Notes:

- If Performance Gap for a Mission/Goal is significant, then all Tasks that support (i.e., linked to) the Mission/ Goal are automatically displayed under the  **Performance Analysis** folder – i.e., no need to add.
- To facilitate the identification of performance gap, the Actual Performance should be reported in a similar format to the Desired Performance.
- If Performance Gap is Acceptable or Not Applicable, then there is no need to carry on further with the analysis.

- If Performance Gap is Significant, then Yes should be selected for Perform Root Cause Analysis field. This will, in-turn, display the **Root Cause Analysis** folder and the **Plausible Solutions** node under the **(task)** node.

### 13. Uncover Plausible Solutions

Should the evaluation reveal a performance deficiency – i.e., a gap between desired and actual Task performance, root cause analysis is needed to determine the source of the problem, which may include: lack of knowledge and skills, misunderstanding of job functions, misinterpretation of rules/regulations, access to tools, conflict with colleagues, and so on – as well as identify and rate plausible solutions in terms of their power to bridge the performance gap. In addition to training and job aids, plausible solutions may include task, job and/or organizational redesign, new/improved tools, policies/procedures, incentive system and hiring practices.

To facilitate data collection, six questionnaires have been provided in Appendix A of Improve Human Performance User Guide. The forms may be completed during an interview or observation session, or handed out to participants. To launch the Root Cause Analysis for a **(task)** under investigation:

- Step 35. Click on the **Root Cause Analysis** folder to display the eight (8) sections – **Employees**, **Supervisors**, **Feedback**, **Policies**, **Tools**, **Tasks**, **Environment** and **Recruitment** – that require completion.



- Step 36. To indicate employees' qualifications as well as knowledge and skills, understanding of relevant policies and procedures, interpersonal skills, dependency on tools, quality of feedback, attitude towards incentive system as well as job satisfaction, click on the **Employees** node, complete applicable fields under various tabs based on collected data and click Save.



Step 37. Plausible solutions are presented and rated under the **Plausible Solutions** node. To find out why a solution should be considered, click on the solution title. The reasons, based on information provided, are presented in the window at the bottom of the screen.

The screenshot shows the ADVISOR software interface. The left sidebar is a tree view with the following structure:

- Performance Analysis
  - Air Force
    - Mission Evaluations
    - Performance Indicators
    - Job Analysis
      - Aircraft Commander
        - Performance Analysis
          - 30/10/2012 Conduct Pre-mission Planning Duties
            - Root Cause Analysis
              - Employees
                - Supervisors
                - Feedback
                - Policies
                - Tools
                - Tasks
                - Environment
                - Recruitment
                - Plausible Solutions** (highlighted with a yellow arrow)
                - Recommended Solutions

The main window displays the 'Plausible Solutions' node. The 'Root Cause Analysis Report' window is open, showing a table with the following data:

Impact	Solution Type
Medium	Knowledge/Skills Training (highlighted with a yellow arrow)
	Interpersonal Skills Training
	Policy/Procedures Training
	Task Training
	Supervisor Involvement Training
	Supervisor Policy/Procedures Training
	Supervisor Leadership Skills Training
	Supervisor Organizational Skills Training
	301-Acts
	Work Related Feedback
	Colleagues Feedback
	Supervisor Feedback
	Communication Procedures

At the bottom of the report window, the following text is displayed:

Knowledge/Skills Training is recommended because:  
 Employees Have Skill To Perform Task - Somewhat  
 Employees Knowledge of Task - Somewhat  
 Employees Qualified To Perform Task - Yes

#### Note:

- You may override ADVISOR's preliminary recommendations by selecting the Impact of alternate solutions or removing the impact of recommended solutions, locking your selection and clicking Save.
- Plausible solutions may not necessarily be recommended. Final decision should be based on the feasibility of implementing plausible solutions as well as their cost.

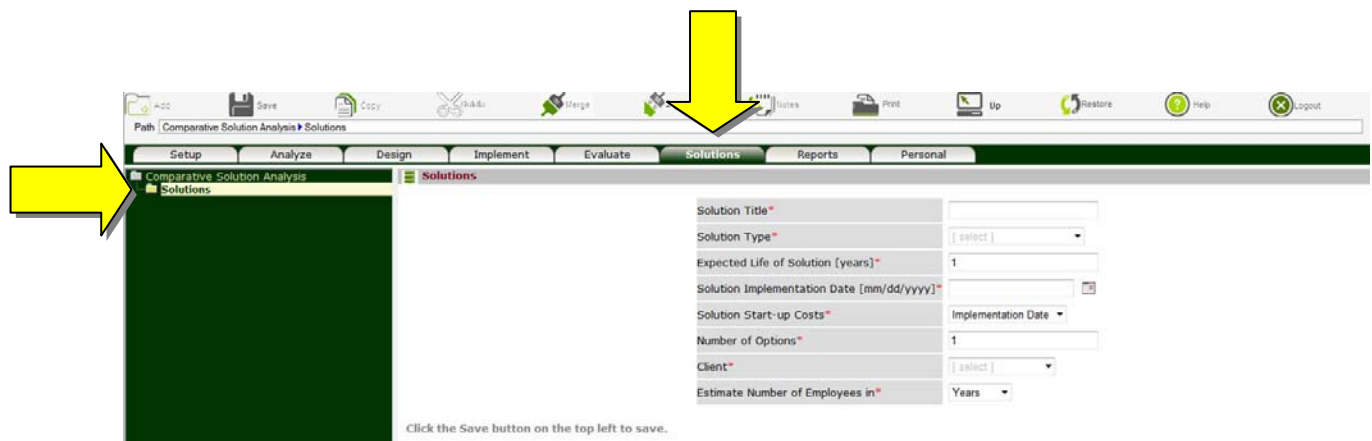
## 14. Setup Plausible Solutions

Plausible solutions viability can be determined by examining compatibility with existing systems, money and resource requirements as well as management, supervisors and employees attitudes towards the proposed solutions. With costs and potential benefits in hand, anticipated return on investment (ROI) from each solution can be calculated. To setup a new solution:

Step 38. Click on the [**Solutions**] tab.

Step 39. Click on Add (button) (top left corner).

Step 40. Input the requested info such as Solution Title, Solution Type, Expected Life, etc. Data required by ADVISOR is identified by a red asterisk (\*). Complete the form and click Save. Of course, the more data you provide, the better the results.



Note: You may also share your analysis with colleagues (i.e., Users assigned to the same Client) by clicking on the [Sharing] tab, placing checkmarks next to their names and click Save.

Step 41. Click on next to the (solution title) node to expand.

Step 42. To specify the titles of options to be considered, click on the Options node, input the title for each option and click Save.

Step 43. If Job Profiles (Positions) have been defined under Job Analysis folder under the (project) node, a Target Audience folder will appear. To select Target Audience for this solution, click on Target Audience folder, place checkmarks next to the job under investigation and click Save.

If Target Audience requires this type of solution, a Link Solution to Job Tasks node will appear. To associate the current analysis with a plausible solution identified under Section 13. Uncover Plausible Solutions, click on Link Solution to Job Tasks node, select relevant solution(s) and click Save. The link indicates that the solution under investigation will resolve the performance deficiency for the Target Group. In other words, the current analysis reflects the effectiveness and costs of the plausible solution.

Step 44. The projected number of individuals that require this solution in each year should be indicated under the Individuals Per Year node.

## 15. Evaluate the Effectiveness of Plausible Solutions

To assess the feasibility and effectiveness of plausible solutions:



Step 45. Click on the **Feasibility Analysis** folder to display the four (4) sections – **Management**, **Employees**, **Supervisors**, and **Resources** – that require completion.




Step 46. To indicate management awareness and support to plausible solutions, click on **Management** node, complete applicable fields based on collected data and click Save.


Step 47. The effectiveness of plausible solutions is presented under the **Effectiveness** node. A 100% rating indicates a perfect match, i.e., the proposed solution meets all of management, employees, supervisors and organizational needs. A 0% indicates that the proposed solution does not meet one or more critical requirement. To find out why a solution is not recommended or why the effectiveness has been reduced, click on the solution title. The reasons, based on information provided, are presented in the window at the bottom of the screen.

## 16. Compute the Costs of Plausible Solutions

Step 48. To compute the costs of alternate options, click on  next to the  **Cost Analysis** folder to expand.


Step 49. Click on the  **Basic Variables** node, input the required information and click Save.




Step 50. To estimate development costs, click on the  **Development** node, input the required information for each option and click Save.


Step 51. To estimate hardware costs, click on the  **Hardware** node, input the required information for each option under [Purchase] and [Operation] tab, and click Save.

Step 52. To estimate software costs, click on the  **Software** node, input the required information for each option under [Purchase] and [Maintenance] tab, and click Save.



Step 53. To estimate administrative costs, click on the  **Administrative** node, input the required information for each option and click Save.


Step 54. To estimate management costs, click on the  **Management** node, input the required information for each option and click Save.


Step 55. To estimate support costs, click on the  **Support** node, input the required information for each option under [Maintenance] and [Technical Support] tabs, and click Save.

Step 56. To view a detailed breakdown of the costs of alternate options, click on the  **Summary** node. You may also view direct (budget related) costs, indirect (productivity related) costs, start-up and recurring costs as well as personnel required to develop, administer, manage, maintain and support each option by clicking on the corresponding tabs.

## 17. Solution ROI


Step 57. To view the recommended option, click on the  **ADVISOR Recommendations** node under the  **Summary** folder. Options are presented from most to least favorable. To find out why the rating of a solution has been reduced, click on the solution title.

Step 58. Once you have examined the effectiveness and costs of various solutions, you can select the option that best meets your needs by clicking on the  **User Recommendation** node, selecting an option and click Save.


Step 59. The Return on Investment (ROI) of User Recommended Solution based on its projected impact on various Tasks and in-turn missions/goals is presented by clicking on  **Projected ROI** node.



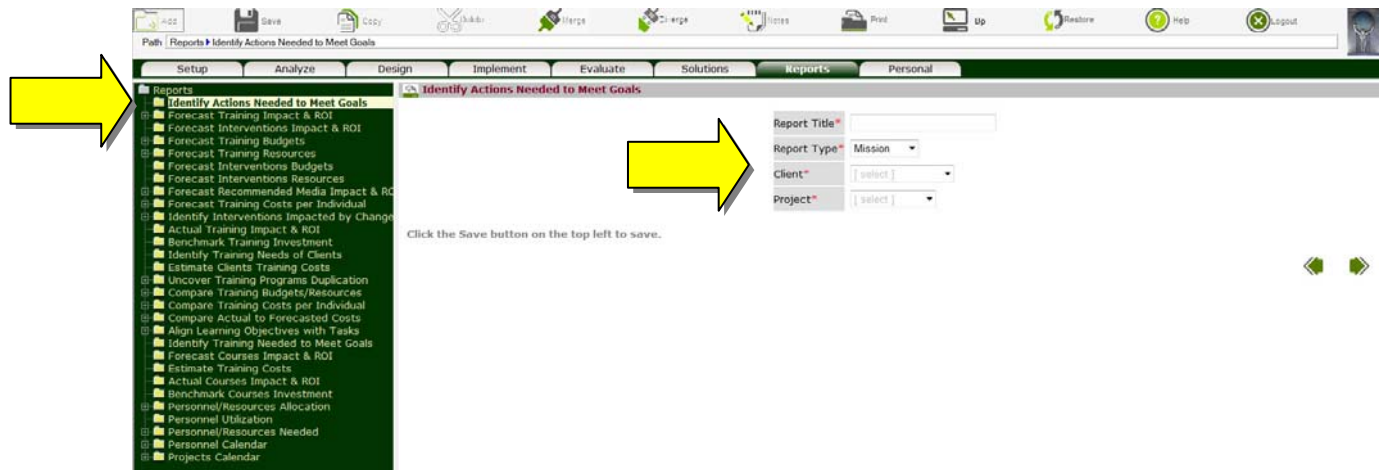
## 18. Generate Reports

Step 60. Comprehensive business case report that documents process used to evaluate the effectiveness and compute the costs of alternate options can be generated by clicking on the  **Solution Report** node, selecting items to be included and clicking Save. The report in html format is presented in a new window. You may print or save the report using the corresponding functions in your Browser.

Since the report is in html format, you can quickly advance to any section by clicking on the corresponding title in the Table of Contents. To return to ADVISOR, close the Solution Report window.

Step 61. Executive reports can be created by clicking on the **[Reports]** tab followed by  **Identify Actions Needed to Meet Goals** folder. The report provides clear insight on solutions needed to resolve performance deficiency for each Mission/Goal or Task. To generate, click on Add (button), input Report Title, Type, Client and Project, and click Save. Next, select the desired Missions/Goals or Tasks and click Save one more time to generate.

Since the report is in html format, you can click (drill down) on each solution to find out the costs, impact, benefits and ROI. You may print and/or save the report using the corresponding export and print icons (top left corner). To return to ADVISOR, close the Report window.



**Remember that context sensitive help is also available for each screen by clicking on the Help (button). Enjoy!**