Configure ADVISOR Step by Step Guide

ADVISOR Enterprise User's Guide

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Foreword

ADVISOR Enterprise is a Training Management System that drives training efficiency by (a) aligning current and future training activities to operational requirements to identify gaps, duplications and training with minimal value; (b) forecasting and comparing the costs of viable delivery options; (c) uncovering cost drivers; and (d) improving resource allocation. ADVISOR is built around the ADDIE model with the added flexibility of starting the analysis at any level. ADVISOR is made up of the following modules that can be used separately or in any combination.

Needs Assessment

Assess: To find out "*the cause of the problem and potential solutions*". Provides a step by step approach for understanding a problem before selecting the solution – in other words, before assuming that training is needed. Needs Assessment provides an audit trail and serves as the foundation for decisions by zeroing in on the source of the problem, identifying solutions that can produce the desired level of productivity, and highlighting actions that will generate the greatest impact. [Scope and Needs Assessment].

Training Analysis

Analysis: To find out "*who needs to be trained, on what and why*". Provides a step by step approach for conducting Training Needs Analysis (TNA) or Training Systems Requirements Analysis (TSRA) to identify training needed by each job, position and employee to perform duties to the desired standard under the prescribed conditions. Four approaches may be used to conduct training analysis, namely Mission, System, Competency or Job. [Mission Analysis, Competency Analysis, System Analysis, Job Task Analysis, Knowledge/Skill Gap Analysis and Training Requirements Analysis].

Training Design

Design: To find out "*what is the most effective and economical way to deliver training*". Provides a step by step approach for conducting Training Media Analysis (TMA) or Option Analysis to identify the most cost effective strategy for the delivery of training and generates Training Plans. The analysis takes into account limitations, instructional design requirements, upfront and recurring costs over training program life as well as risks associated with the introduction of new technology. [Media Analysis, Cost Analysis and Training Plans].

Fidelity Analysis

Develop: To find out the "*fidelity requirements of training devices*". Provides a step by step approach for assessing the functional requirements of trainers and simulators based on training needs and performance objectives. It identifies visual, tactile, olfactory, affective and auditory sensory cues needed to practice tasks, within realistic environments, under preset conditions to attain the desired level of competency. In addition, ADVISOR takes into account elements within the virtual world and how users interact with each.

Resource Management

Implementation: To find out "*how much money and resources are needed*". Compiles and analyzes missions/goals, competencies, systems, jobs, tasks, training requirements, courses, activities, costs, personnel and resources to generate concise, up to date and actionable reports. The reports provide insight on planned training activities for any time period; training requirements for each job/employee; budget, personnel and resource requirements, training impact as well as how to drive training effectiveness and efficiency by leveraging technology, improving resource allocation and identifying gaps, duplications and unwarranted training. [Forecast and Optimize Training Budgets, Personnel and Resources].

Project Management

Implementation: To find out "*how training should be implemented*". Provides a step by step approach for planning a project and tracking progress in real time. This includes the setup of phases and tasks, dependencies and constraints, timelines as well as the assignment of personnel and resources needed to complete. Moreover, ADVISOR tracks progress by comparing hours worked and money spent on each task to project plan, to anticipate delays, facilitate the implementation of corrective measures, and keep projects on-time and within budget. [Develop Project Plans and Track Progress].

Performance Analysis

Evaluation: To find out "*how training impacts performance and organizational goals*". Provides a step by step approach for improving performance by zeroing in on the source of the problem and identifying solutions that can produce the desired level of productivity. Moreover, ADVISOR highlights actions that will generate the greatest impact by assessing the feasibility of implementing plausible solutions as well as forecasting the costs, benefits and Return on Investment (ROI) of each intervention. [Performance Gap Analysis, Root Cause Analysis and Cost Benefit Analysis].

Training Life Cycle Management

Manage: To "*continually uncover venues to drive training effectiveness & efficiency*". Maintains training effectiveness and efficiency over time by continually assessing the impact of changes to missions, jobs, tasks, systems, policies, technologies, throughput, and so forth on training content and activities; as well as budget, personnel and resource requirements. This is attained through a digital-twin model that continually aligns training activities to operational requirements to identify gaps, duplications and training with minimal value. Results (personnel/resource requirements for any time period; cost drivers; bottlenecks and deficiencies) are quickly and concisely communicated through dashboards. Actions that drive training effectiveness and efficiency are also highlighted.

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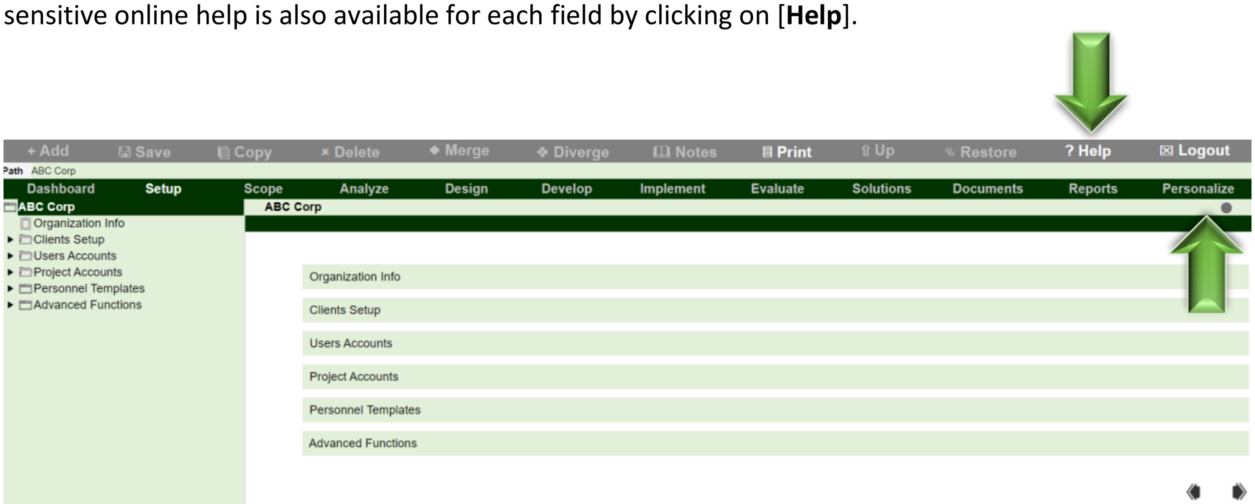
Chapter 1: Getting Started

1.1 Introduction

Although most organizations follow variations of the Analysis, Design, Development, Implementation and Evaluation (ADDIE) model to design and develop effective and efficient training; data to be collected, analysis to be conducted and reports to be generated can vary significantly from one organization to another. This guide provides step by step instructions on how to configure ADVISOR in line with your organization or clients' needs, as well as streamline user's interface by limiting access to relevant areas.

1.2 Getting Started

To log on to ADVISOR Enterprise, go to http://www.bnhexpertsoft.com, click on "**Log in**", input your Username and Password, and click [Login]. A Popup Window with step by step instructions is presented to familiarize you with ADVISOR. You may change your username, password and preferences by clicking on the Preferences node under the **Personalize** tab, editing the required items and clicking [**Save**]. For example, you may hide or display the Popup Window under the **Options** tab under the Preferences node by placing or removing the checkmark next to the ADVISOR Tour field and clicking [**Save**]. Context sensitive online help is also available for each field by clicking on [**Help**].



1.3 How is ADVISOR Organized?

ADVISOR has five main components organized within 3 windows (top, left and right – the sizes of the windows can be adjusted by dragging the border). Once you become familiar with these components, the system operation and navigation will become fairly simple.

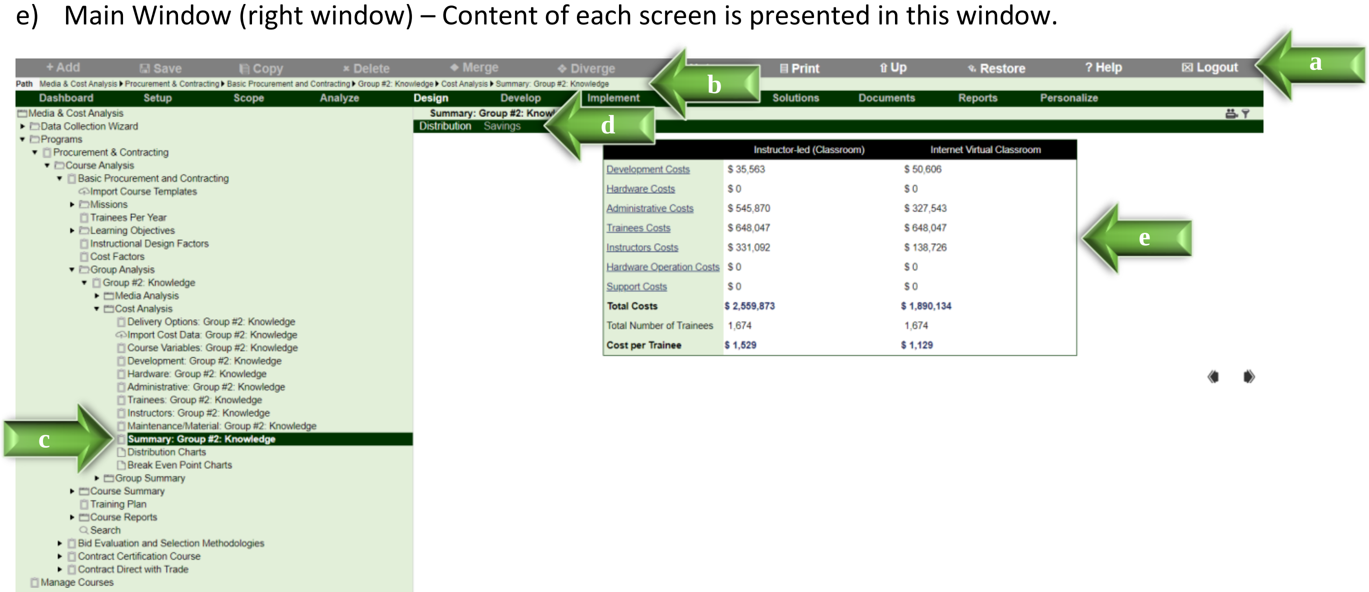
a) Buttons (top window) – Actions available to user are presented as a series of buttons at the top of the screen. You can Add, Save, Copy, Delete, Merge, Diverge, add comments/assumptions to a screen (Notes), Print a screen, Return to previous level (Up), Restore previous values, request Help or Logout. Information is only saved when you click [**Save**].

b) Path (top window) – Tracks your progress as you navigate through ADVISOR.

c) Tree (left window) – Lists options (nodes) available to user. To expand an option (node), click on the [▶] sign. To view the contents of an option (node), click on corresponding node.

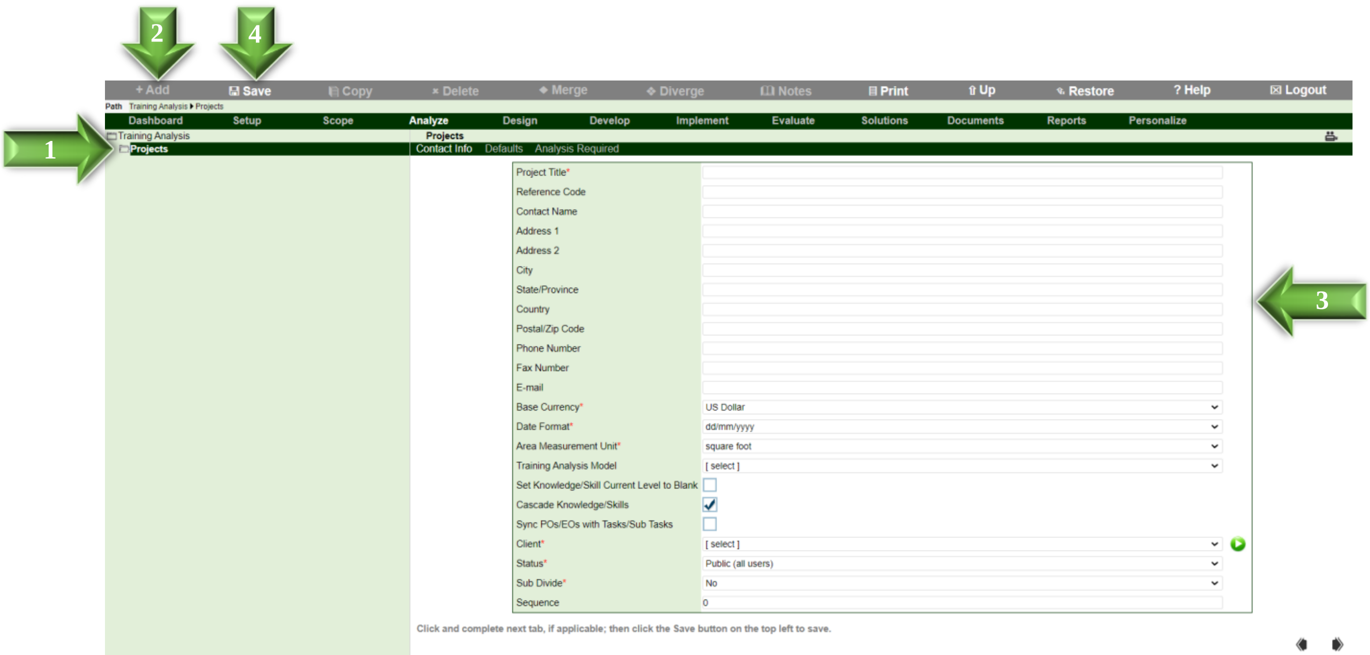
d) Tabs (top of right window) – Data for some nodes are divided into several tabs. Click on tab to view its contents.

e) Main Window (right window) – Content of each screen is presented in this window.



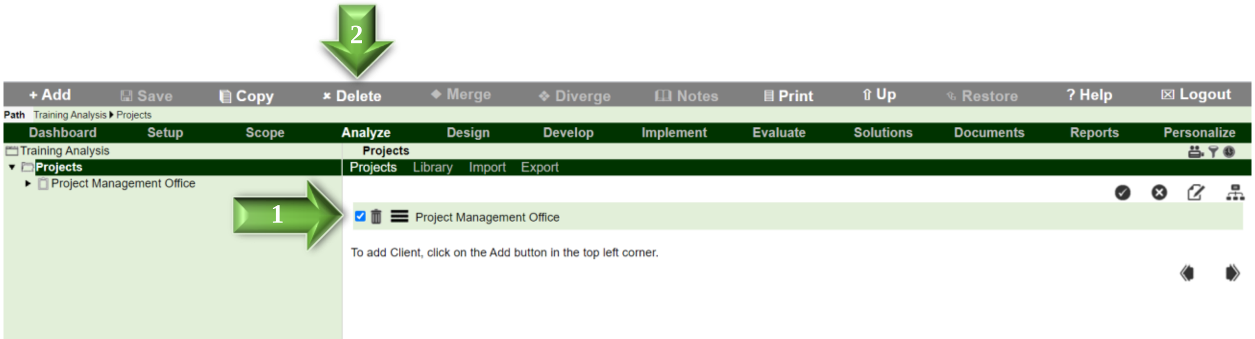
1.4 Basic ADVISOR Functions

Add: To add a Project, Mission, Job, Task, Objective, Course or any other element:
Step 1: Click on corresponding folder (Projects, for example).
Step 2: Click on [**Add**].
Step 3: Input the desired info.
Step 4: Click on [**Save**].

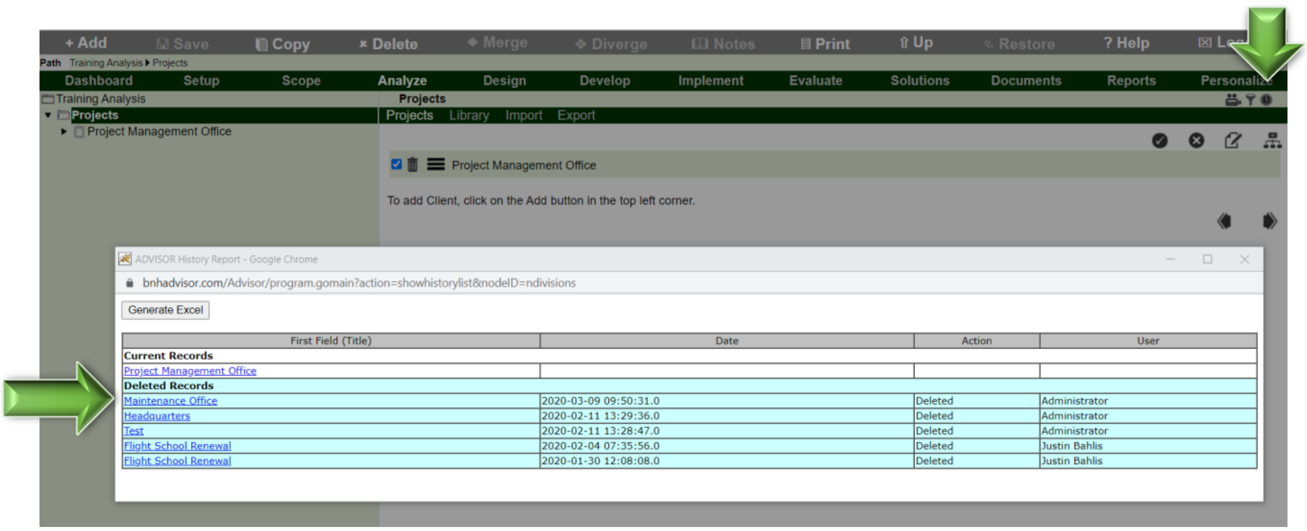


Edit: To edit a Project, Mission, Job, Task, Objective, Course or any other element:
Step 1: Click on corresponding element (Project A, for example).
Step 2: Modify the desired info.
Step 3: Click on [**Save**].

Delete: To delete a Project, Mission, Job, Task, Objective, Course or any other element:
Step 1: Place checkmarks next to the desired records (Project Management Office, for example).
Step 2: Click on [**Delete**].



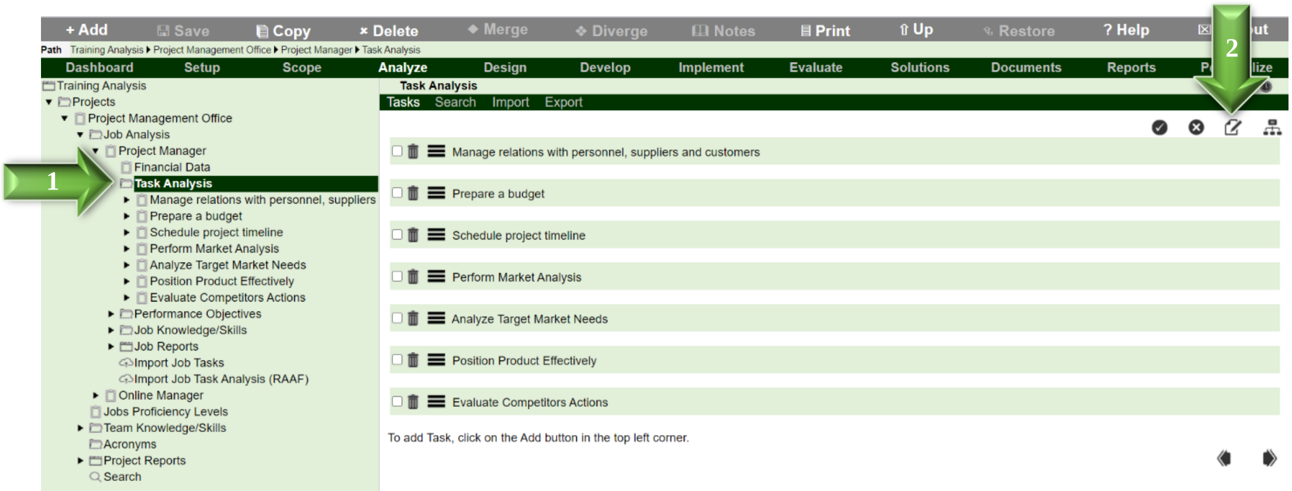
Track Changes: To find out when an element was created, modified or deleted and by whom, click on the View History icon to display relevant data.



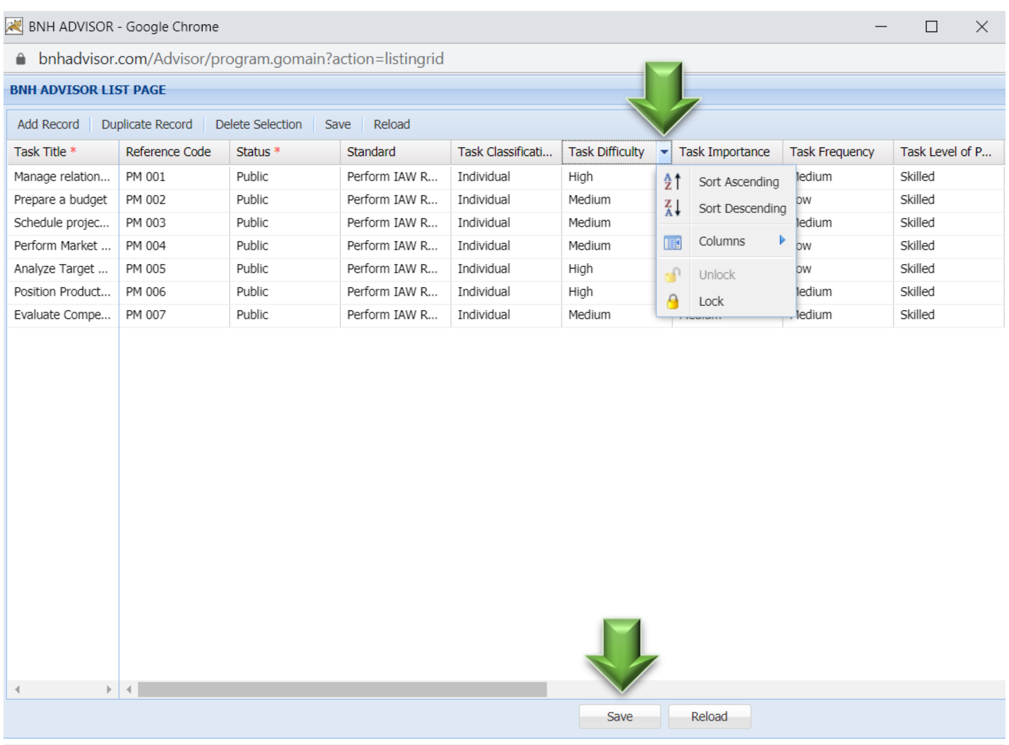
Edit Multiple Records: To edit multiple Projects, Missions, Jobs, Tasks, Objectives, Courses or any other elements:

Step 1: Click on the corresponding folder.

Step 2: Click on the **Edit All** icon.



The Projects, Missions, Jobs, Tasks, Objectives, Courses, and so forth are presented in an Excel like tabular format. You may sort the data on any column (Title, for example), or lock (prevent the column from scrolling), by clicking on the arrow to the right of the column title, and selecting desired option. To edit a field, click the field, input or select option. Once the desired fields/records are edited, click the [**Save**] button to save all changes.



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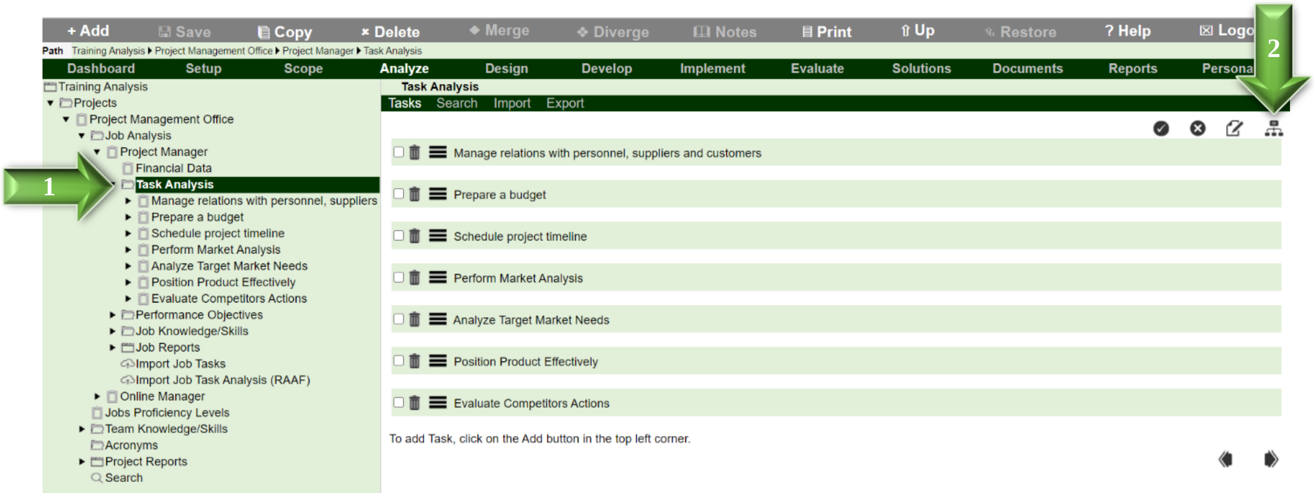
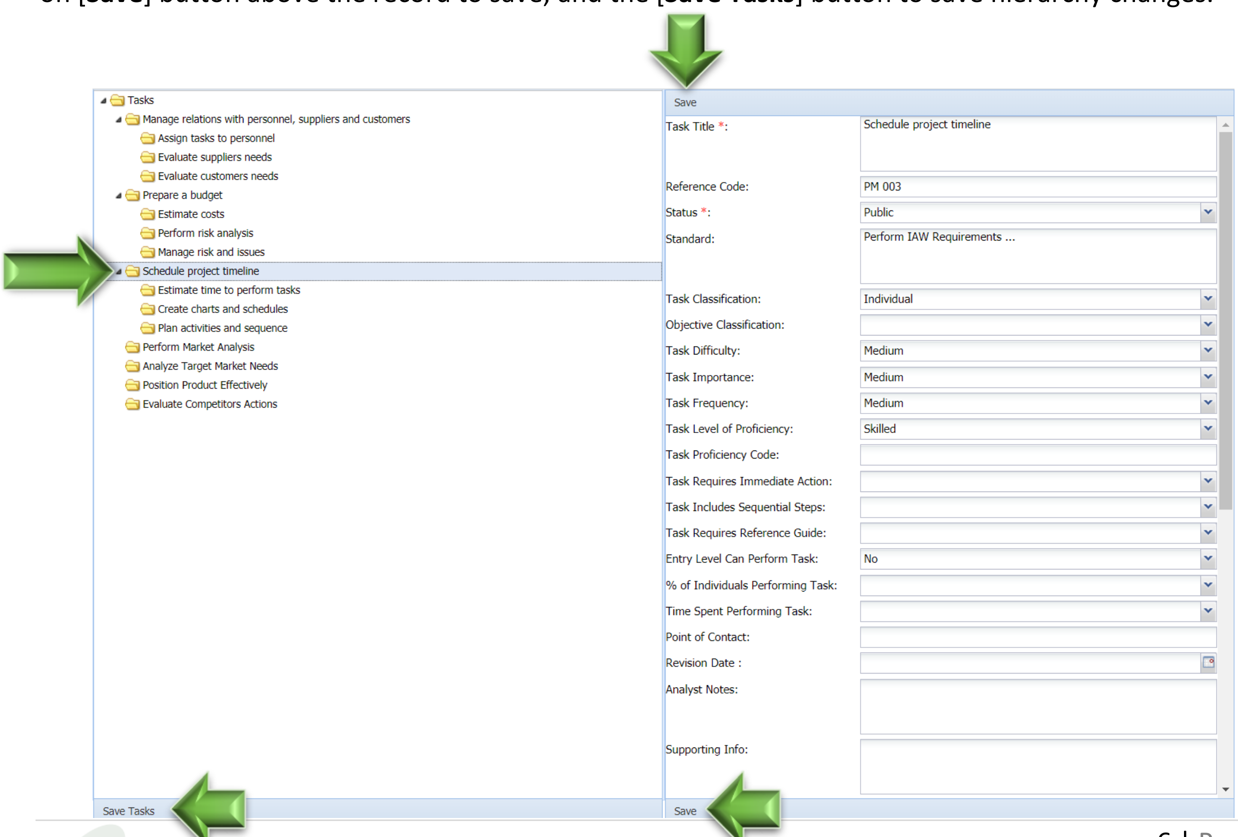
Modify Hierarchy: To change the hierarchy or the order of Tasks or Objectives:
Step 1: Click on the corresponding folder.
Step 2: Click on the **Edit Tree** icon.



Tasks or Objectives are presented in a tree like structure. To change the hierarchy or order, simply drag and drop the tasks or objectives to the desired locations. All links to Missions, Jobs, Objectives, Courses, etc.; as well as attributes including Knowledge, Skills, Attitudes, References and so forth are preserved. For example, "Perform risk analysis" sub task may be dragged under the Tasks folder to become a Task. Moreover, all its links and attributes will remain intact. You may also view and edit the attributes of any Task or Objective by right clicking on the Task and selecting the Edit option. Once record is edited, click on [**Save**] button above the record to save; and the [**Save Tasks**] button to save hierarchy changes.

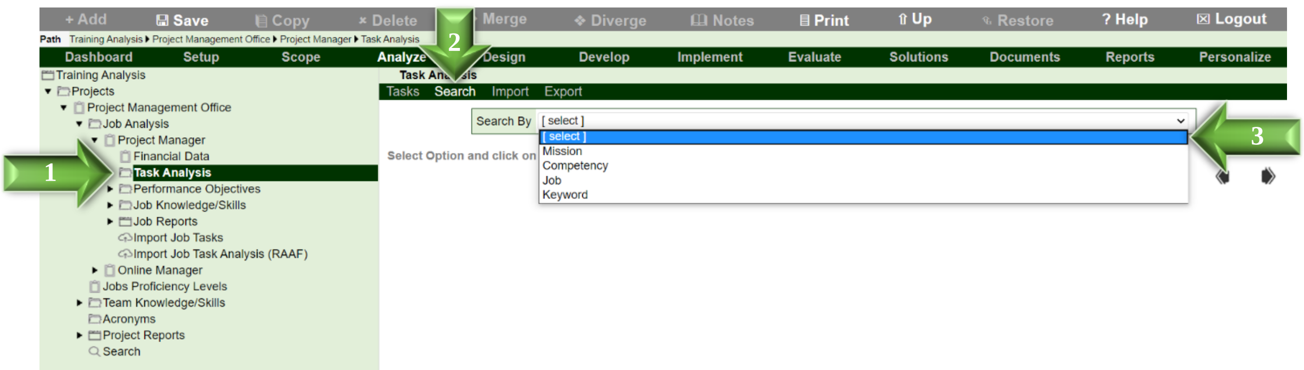


Search and Copy: You can search and copy Jobs, Tasks and Performance Objectives as follows:

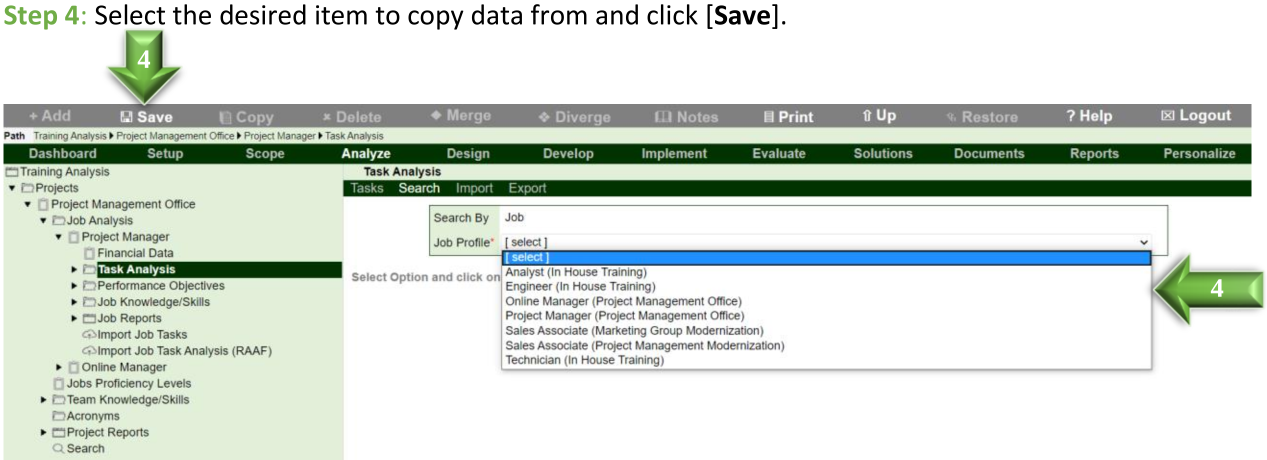
Step 1: Click on the desired folder – Mission Analysis, System Analysis, Job Analysis, Tasks Analysis, Performance Objectives or Course Analysis.

Step 2: Click on the [**Search**] tab.

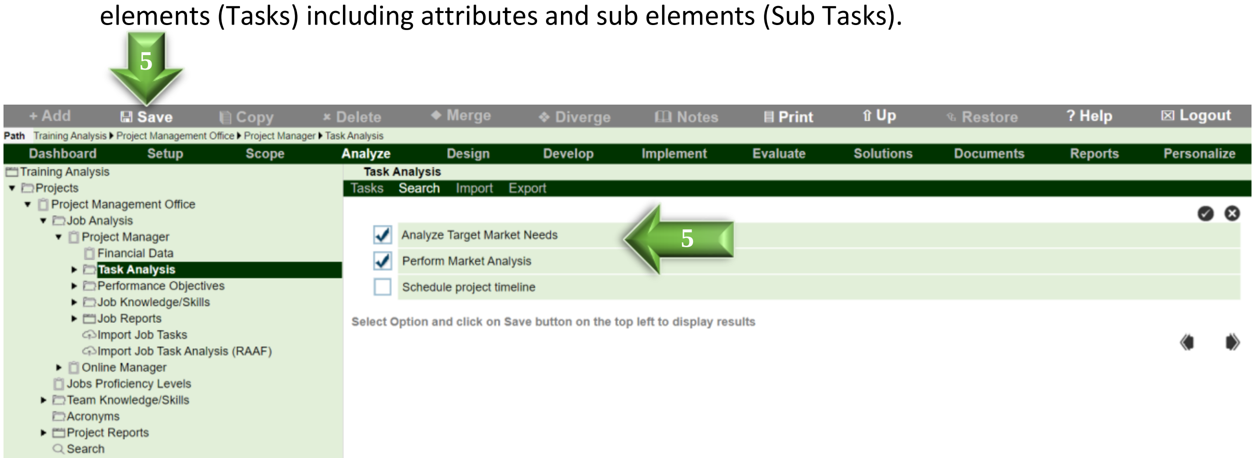
Step 3: Select the desired search criterion and click [**Save**] – more options may be provided – to display available elements.



Step 4: Select the desired item to copy data from and click [**Save**].



Step 5: Place checkmarks next to the desired elements (Tasks, for example) and click [**Save**] to copy the elements (Tasks) including attributes and sub elements (Sub Tasks).



Import Data: Dozens of Excel Spreadsheets are provided (http://www.bnhexpertsoft.com/data-collection-forms/) to simplify and speed offline data collection from Subject Matter Experts (SMEs). The attributes and options within each form (Job Tasks, for example) are identical to the corresponding (Job Tasks) fields within ADVISOR. Once completed, the data can be uploaded to ADVISOR Enterprise with a few mouse clicks, as follows:

Step 1: Click on the folder where data should be imported. Please note that each spreadsheet is designed to import data under a specific folder within ADVISOR Enterprise. For example, the Mission Tasks spreadsheet is designed to import Tasks under Missions, while the Job Tasks spreadsheet is designed to import Tasks under Jobs.

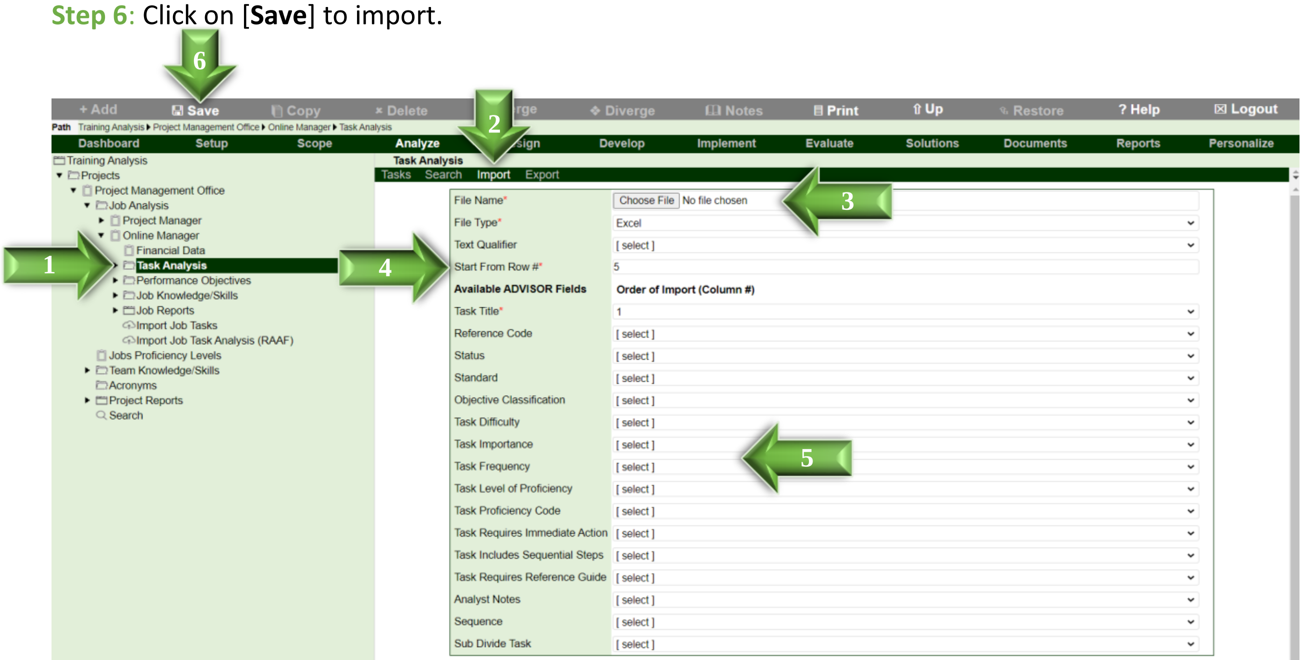
Step 2: Click on the [**Import**] tab.

Step 3: Click **Choose File** and select the desired spreadsheet.

Step 4: Row on which data import should start, should be specified in the **Start From Row** field. The top 4 rows in ADVISOR Excel spreadsheets are reserved for headings and instructions. Collected data typically starts on the 5th row.

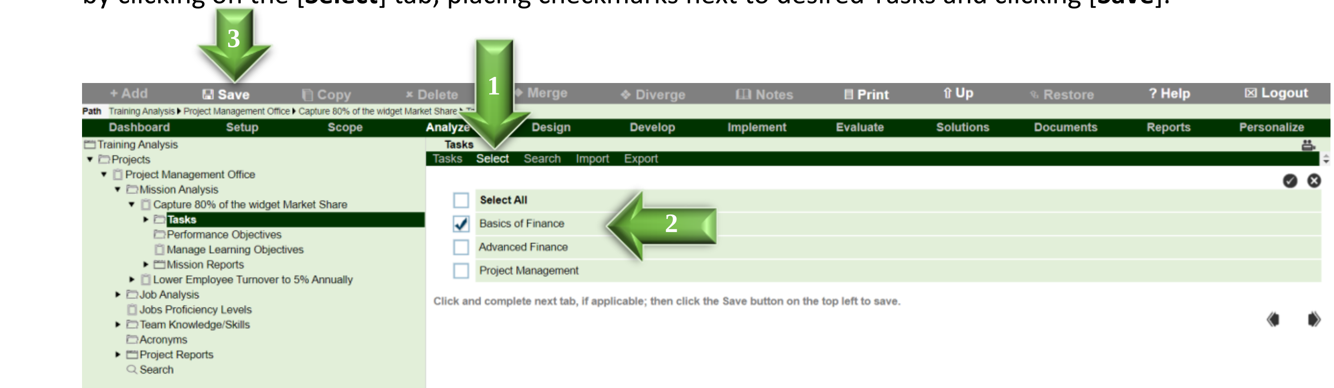
Step 5: Indicate where the data for each field resides within the Excel spreadsheet. For example, if Task Title is stored in column 1, then input 1; and so forth. Data in Excel spreadsheets is sequentially mapped to corresponding fields in ADVISOR. You are not required to import all attributes. For example, if the Status and Task Classification attributes are not required, do not input column numbers for these fields. ADVISOR will not import data for attributes that have not been assigned a column number.

Step 6: Click on [**Save**] to import.



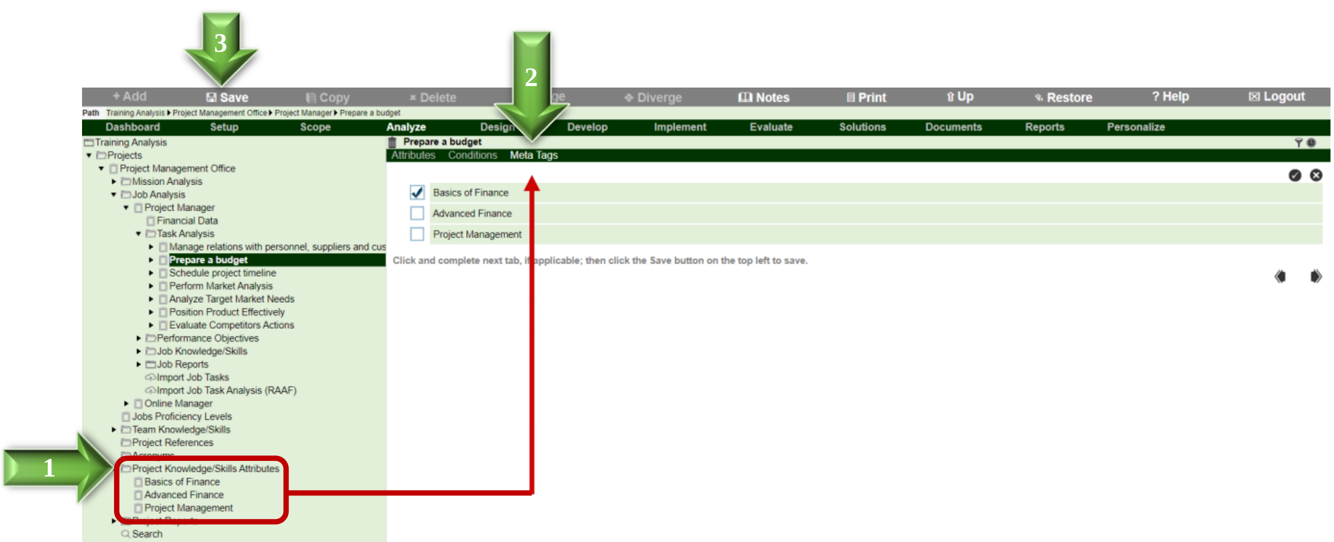
Note: **Reference Code** is also used for detecting duplicate records. For example, if Job Task is imported, ADVISOR will 1st verify whether the Job already has a Task with the same Reference Code. If it does, the following message will appear "Duplicate Records already exist. Overwrite attributes?" If Ok is selected, the attributes of the Job Task in ADVISOR will be updated. If Cancel is selected, the import will be aborted.

Setup and Assign Meta Tags: To minimize duplication each time a Mission, System or Project Task is added, it is stored in a centralized repository. The Tasks can, in-turn, be assigned to any Mission or System by clicking on the [**Select**] tab, placing checkmarks next to desired Tasks and clicking [**Save**].



Similarly, Knowledge, Skills and Attitudes (KSAs) are stored in a centralized repository and can be assigned to any Task or Objective.

To quickly zero in on desired Tasks or KSAs within a repository, Meta Tags can be created under the Project Knowledge/Skills Attribute folder and assigned to any Task or KSA by clicking on [**Meta Tag**] tab, selecting the desired Meta Tags and clicking **Save**.



Chapter 2: Setup Clients

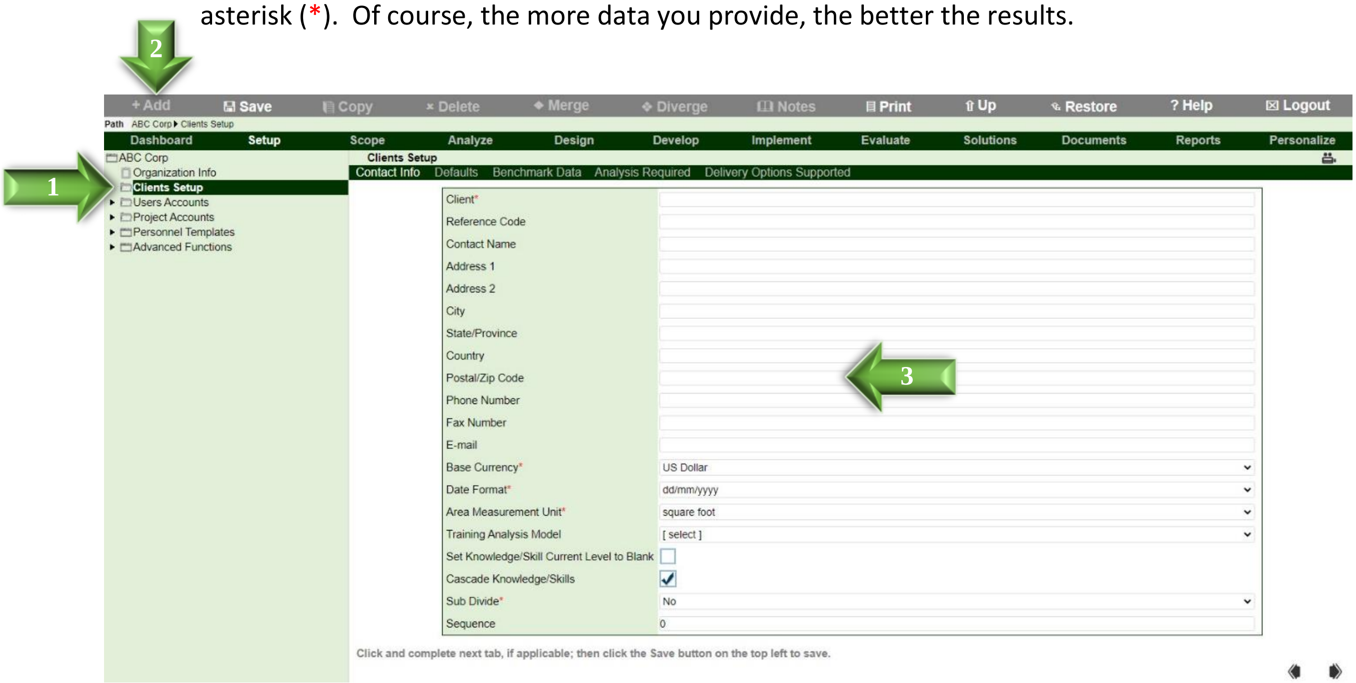
2.1 Setup New Client

Why Setup Clients: Although instructional design models, in general, are based on the ADDIE process, the approach tends to vary from one organization to another based on needs. For example, some prefer a task based approach while other favor a competency based approach. Some capture knowledge/skills requirements during task analysis while others during objective analysis; and so forth. To facilitate the management and support of multiple clients with varying requirements, each client can be setup as a separate entity and configured in line with client's needs. Of course, if you are only supporting one client (your organization, for example), then you would only need to setup one in this case.

Step 1: To create a new client, click on the Clients Setup folder.

Step 2: Click on [**Add**].

Step 3: Input the Client, Contact Name and other info. Data required by ADVISOR is identified by a red asterisk (*). Of course, the more data you provide, the better the results.



Step 4: Click on the [**Defaults**] tab to specify Annual Productive days, Working Hours per Day, Fringe Benefits Factor, as well as Currency Exchange, Discount and Inflation Rates for the Client.

Implication: Annual Productive Days, Working Hours per Day and Fringe Benefits Factor will improve consistency and minimize data entry by automatically populating the corresponding values for trainees, instructors, administrators, managers and support staff in new courses/ solutions. Of course, users may override these values. Discount and Inflation Rates can greatly impact the cost of courses and solutions over time.

Step 5: To specify # of Employees Eligible for Training, Annual Payroll of Employees, # of Employees Trained [per year], # of Trainers as well as the Annual Training per Employee [hours] click on the [**Benchmark Data**] tab.

Implication: Data is primarily used for generating ATD equivalent benchmark reports.

Step 6: Click on [**Save**] to save data.

Note:

- To copy a Client click on the **Clients Setup** folder, place a checkmark next to the Client you wish to copy and click [**Copy**].

2.2 Configure Client – Analysis Required

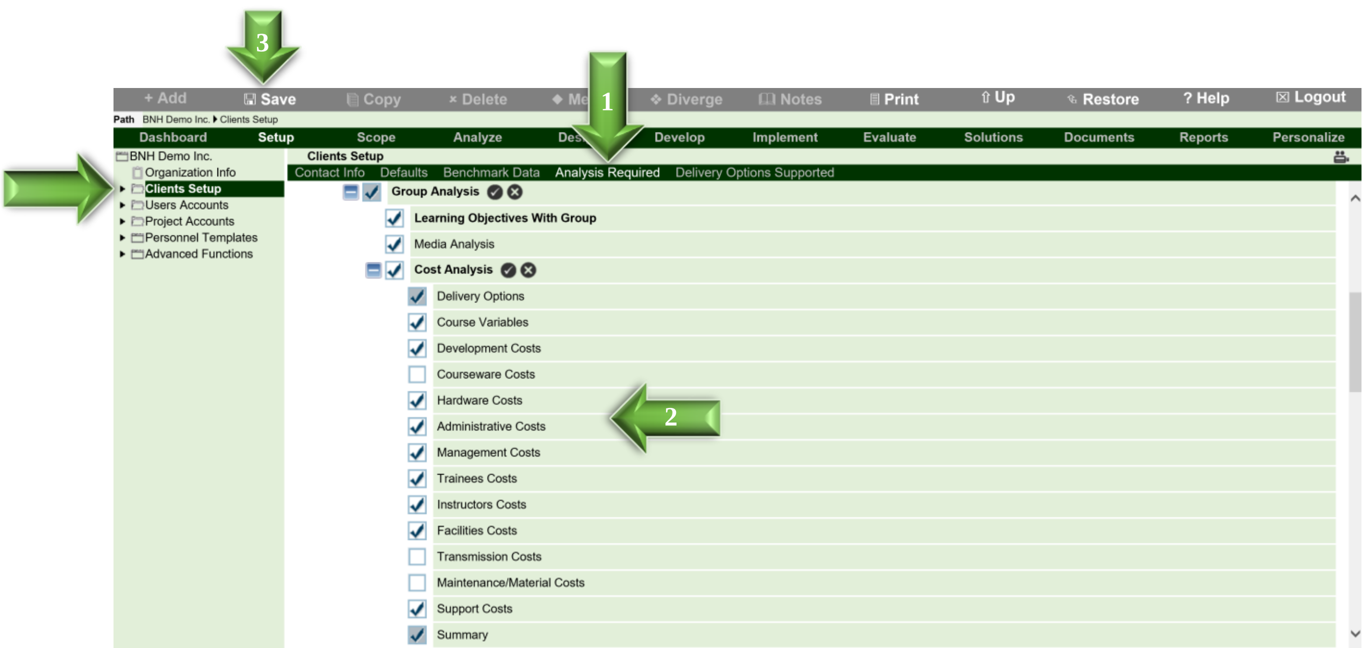
Step 1: To specify data to be collected and analysis to be conducted click on the [**Analysis Required**] tab.

Step 2: Select or deselect required items.

By default, all options are selected. By indicating which data/analysis are not needed, ADVISOR will automatically hide corresponding nodes within all projects for this Client, and in-turn streamline data collection and reduce time required to conduct the analysis – a very effective way to configure ADVISOR in line with your needs.

For example, if a Client is only interested in considering Development, Hardware, Administrative, Management, Trainees, Instructors, Facilities and Support Costs, then the checkmarks for all other costs should be deselected, as shown below. Of course, these nodes/costs can be reinstated, at any time, by reselecting the corresponding options and clicking [**Save**].

Implication: Nodes that correspond to deselected options will be hidden in all projects/courses/ solutions for this Client. For example, Courseware Costs, Transmission Costs, and Maintenance/ Material Costs nodes, in the example below, will be hidden under Cost Analysis under Course Analysis. This, in-turn, will streamline the interface and reduce time needed to conduct the analysis. Since Client configuration impacts all projects/courses/solutions assigned to this Client, these decisions should be carefully assessed.

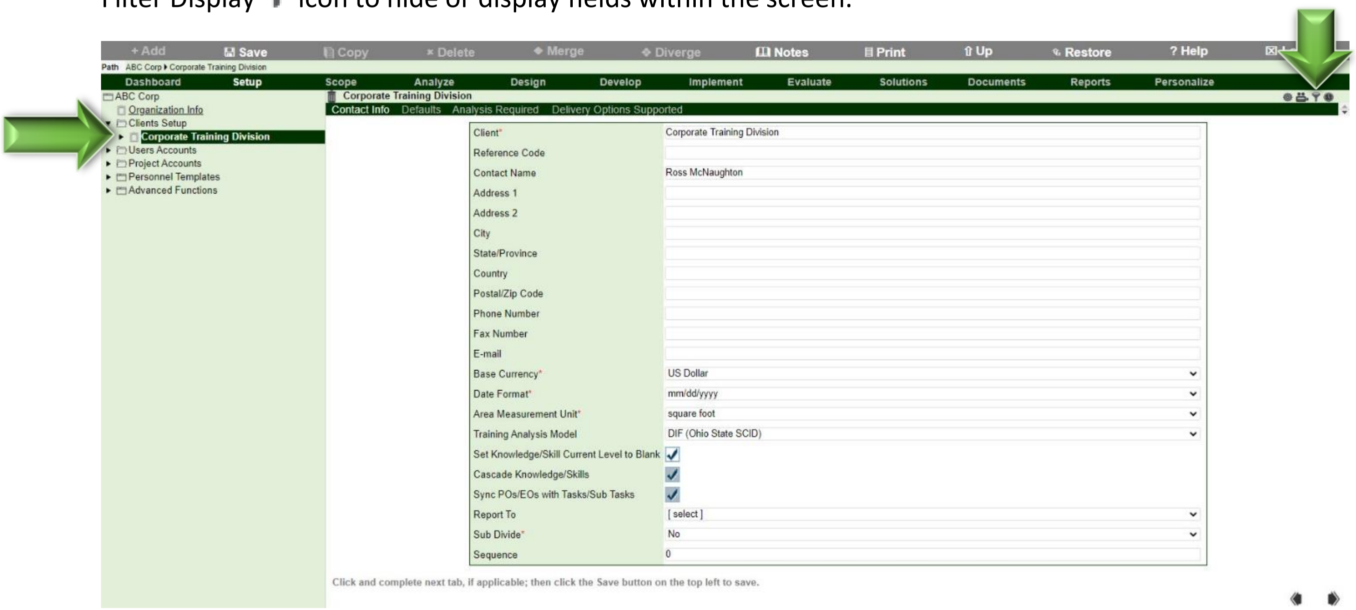


Step 3: Click on [**Save**] to save the Client's configuration.

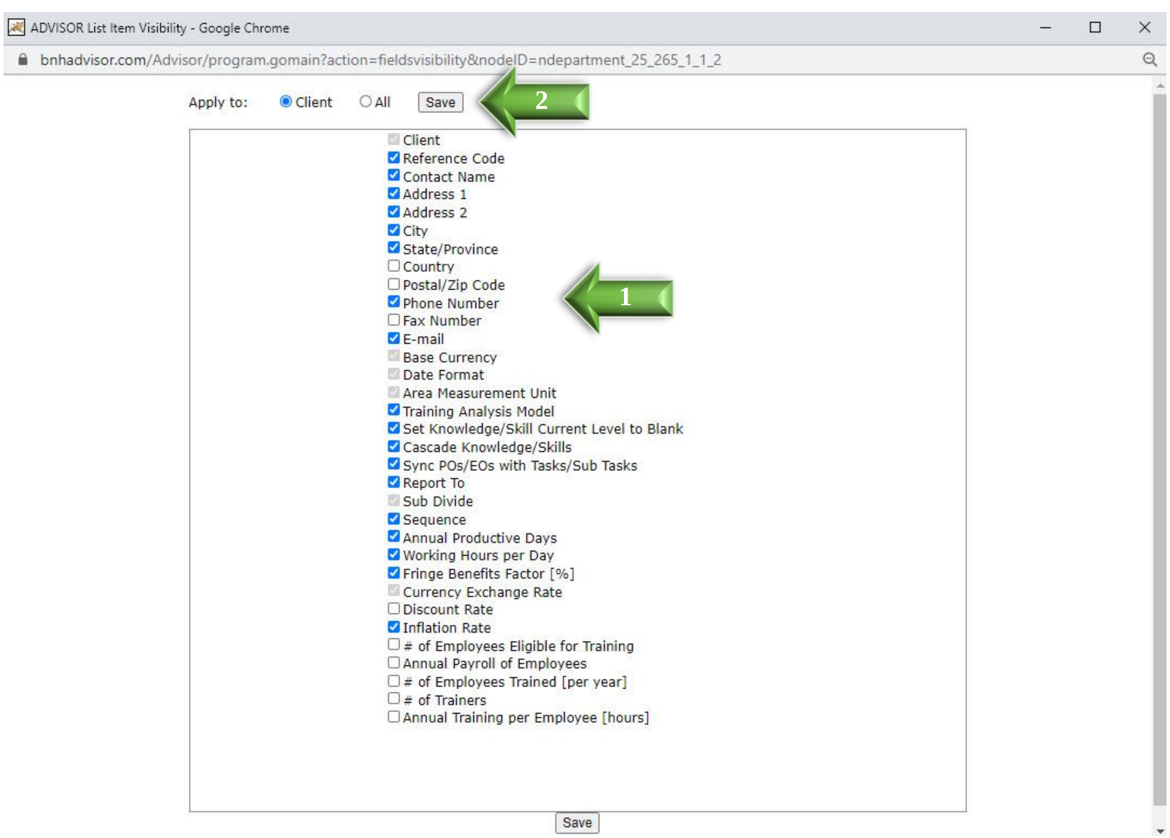
Note: You may also modify the configuration of a single project, course or solution, by turning the Cascade option off and selecting or deselecting options under the [**Analysis Required**] tab for the project, course or solution.

2.3 Configure Client – Fields Required

You may refine the analysis further by hiding or redisplaying fields within any screen by clicking on the Filter Display icon to hide or display fields within the screen.



To hide or display fields, select or deselect the corresponding options, indicate whether this should apply to All, Client or Current Project and click **Save**.



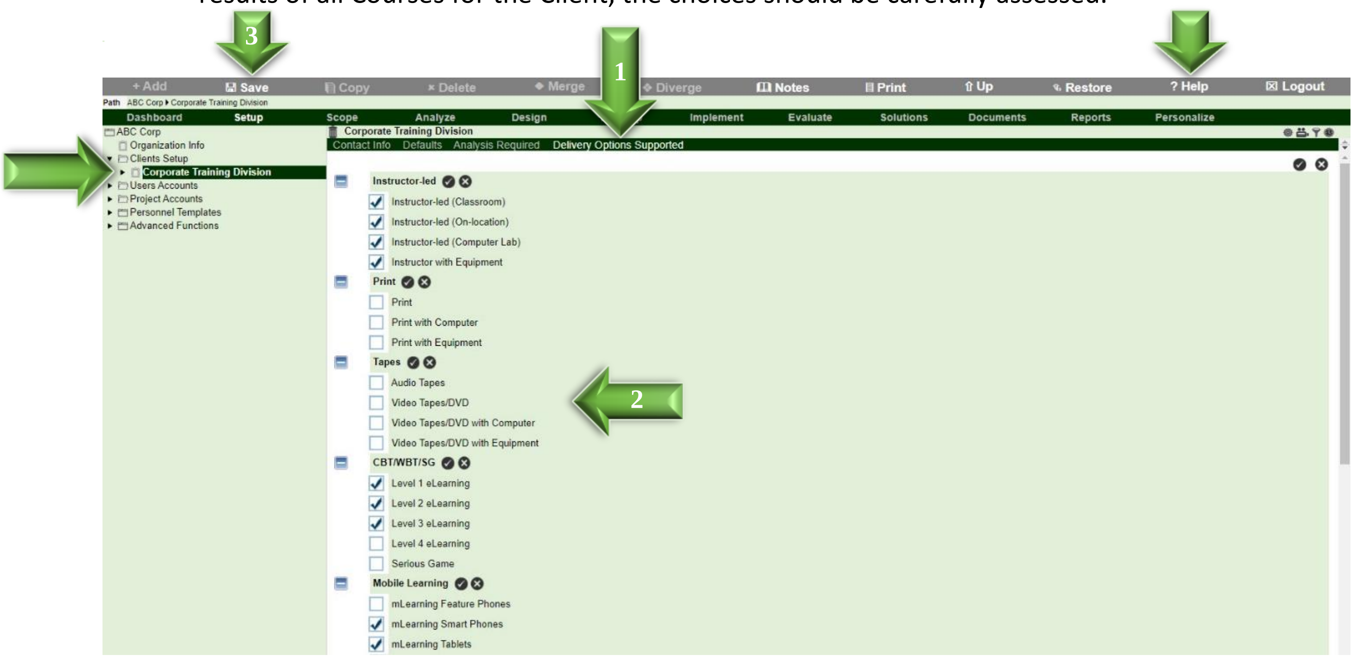
2.4 Configure Client – Delivery Options Supported

Step 1: To indicate Delivery Options supported by the Client, click on the [**Delivery Options Supported**] tab.

Step 2: Place checkmarks next to the required options.

By default, all options are selected. A brief description of each Delivery Option can be viewed by clicking on [**Help**]. Hard copy is also available in Appendix A of the ADVISOR Enterprise "Training Design", User Guide.

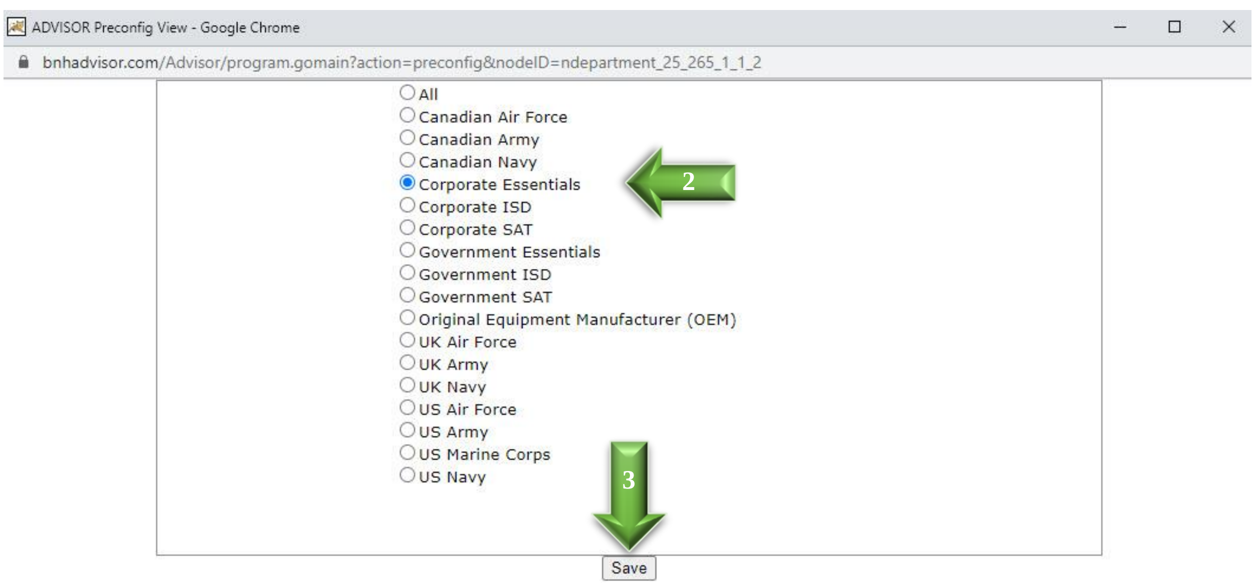
Implication: Only Delivery Options supported by the Client will be considered in the analysis of courses assigned to the Client. In other words, even if Video Tapes is the most effective and economical delivery option, it will not be recommended if the Client does not support Video Tapes. Moreover, all fields related to Video Tapes within corresponding Templates and Courses for this Client will be automatically hidden, which in-turn will streamline the interface and reduce time needed to conduct the analysis. Since Delivery Options selection impacts the analysis and results of all Courses for the Client, the choices should be carefully assessed.



Step 3: Click on [**Save**] to save delivery options to be considered.

2.5 Configuration Wizard

To facilitate to the configuration process, 18 options are provided to quickly configure a Client in line with Canadian Army, Canadian Air Force, Canadian Navy, US Army, US Air Force, US Navy, US Marine Corps, UK Ministry of Defence, as well as various Corporate and Government requirements, by clicking on the Configuration Wizard icon to display available options, selecting desired option and clicking **Save**.



In addition to setting up the currency, DIF model and other parameters, ADVISOR will automatically hide nodes, folders, fields and reports that are not relevant. You can of course tweak the configuration further using the Analysis Required, Filter Fields and Delivery Options Supported configuration options outlined above; or request custom built configurations from BNH to meet specific needs.

2.6 Change Taxonomy

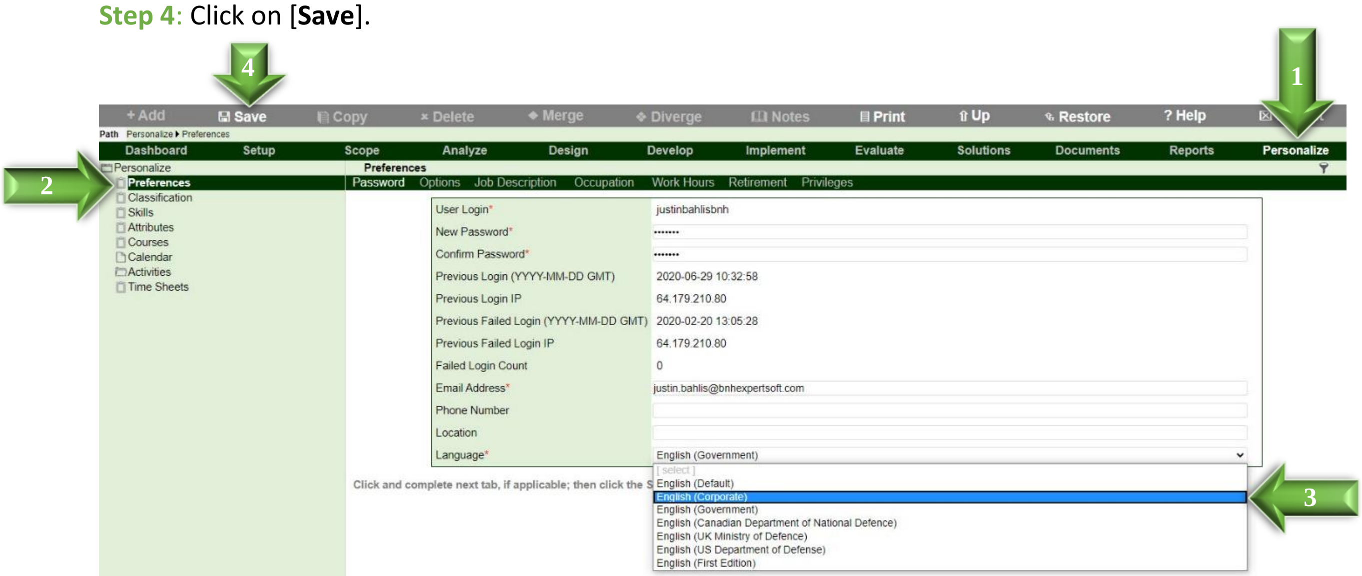
Moreover, the taxonomy can also be modified to reflect the terminology used by the Client. For example Learning Objectives are referred to as Teaching Points by the Canadian Department of National Defence and as Key Learning Points by the UK Ministry of Defence. To change the taxonomy:

Step 1: Click on the **Personalize** tab

Step 2: Click on the **Preferences** node

Step 3: Select the desired option under the Language field. Five options are provided in addition to the Default, namely: Corporate, Government, Canadian Department of National Defence, UK Ministry of Defence, and US Department of Defense. Moreover, you have the option to update the taxonomy as well as create your own under versions 1 and 2.

Step 4: Click on [**Save**].



Chapter 3: Setup Templates & Resources

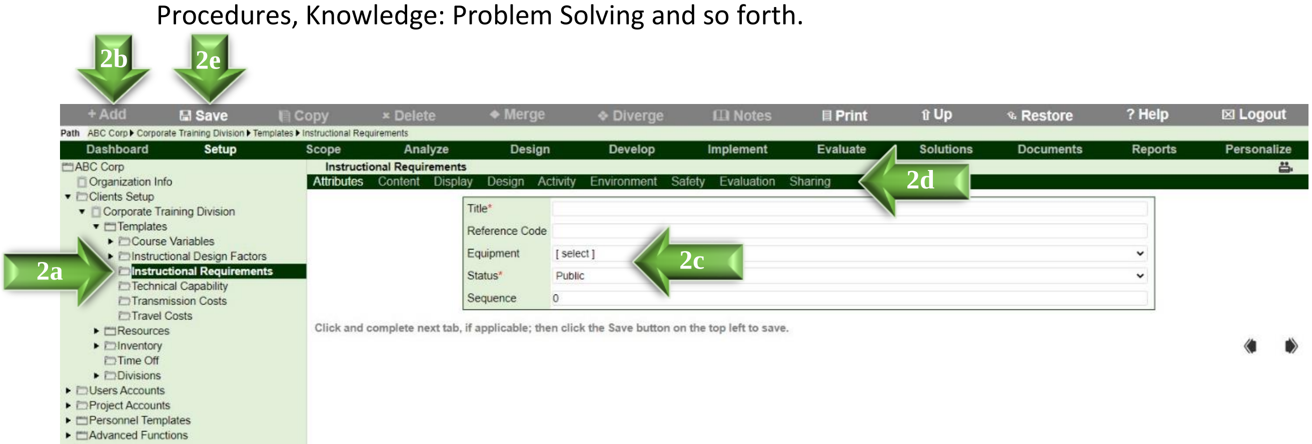
3.1 Setup Templates & Resources

To speed course analysis, maintain consistency, improve accuracy, identify the type and quantity of personnel/resources needed, as well as track personnel/resource allocation and utilization; personnel, resources as well as instructional design templates can be created and shared among users/analysts.

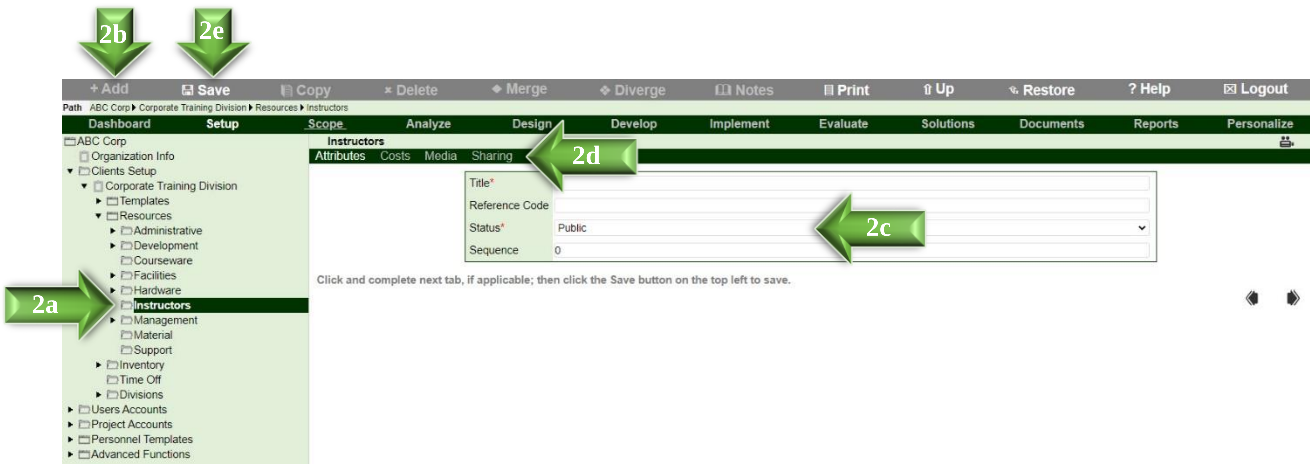
Step 1a: To setup personnel (such as developers, instructors, administrators, managers and support staff) or resources (such as facilities, equipment, or simulators) click on the **Resources** folder.

Step 1b: To setup course variables including trainees to instructor ratios and instructor preparation time; as well as instructional design requirements, technical capabilities, transmission and travel costs click on the **Templates** folder.

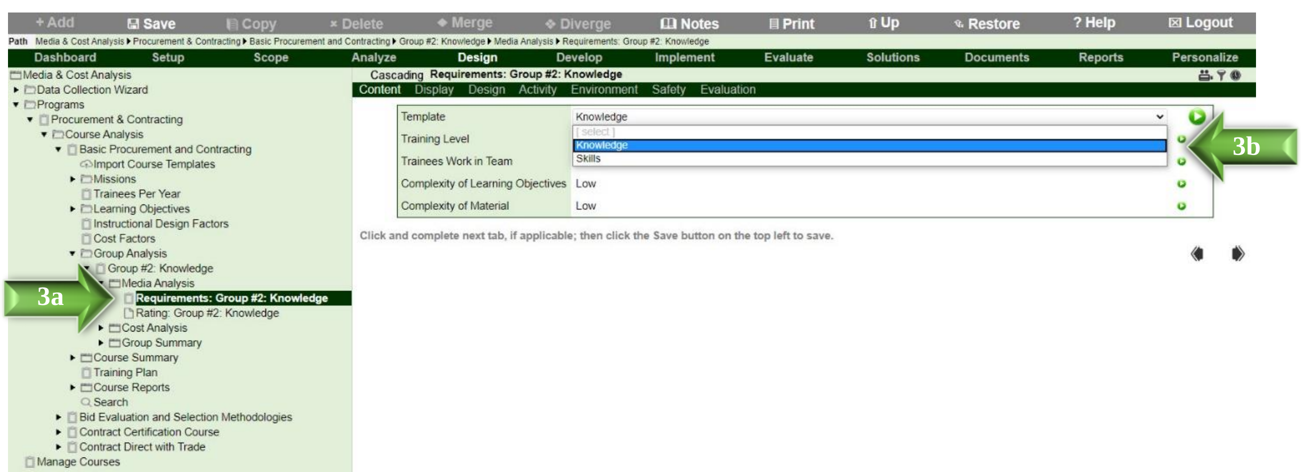
Step 2: To add a Template or a Resource, click on the desired folder under the Template or Resource folders and click [**Add**]. For example, to create an Instructional Requirements Template for Knowledge, click on the **Instructional Requirements** folder under the **Templates** folder, click on [**Add**], input parameters under all tabs and click [**Save**]. You may add as many Templates and Resources under each category as you need. For example, you may add the following Templates under Instructional Requirements: Knowledge: Facts, Knowledge: Rules, Knowledge: Procedures, Knowledge: Problem Solving and so forth.



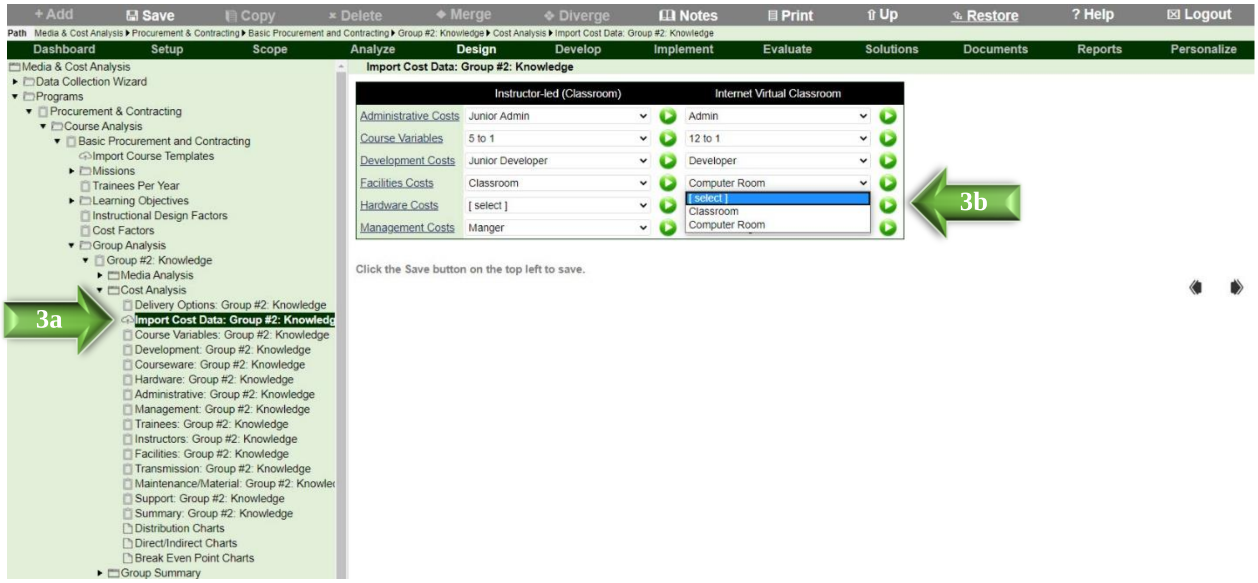
Similarly, the costs and availability of pilot and technician instructors can be created by clicking on the **Instructors** folder under the **Resources** folder, clicking [**Add**], inputting parameters under the [**Attributes**] and [**Costs**] tabs, specifying which media the Template can be used in, under the [**Media**] tab and clicking [**Save**].



Step 3: Once created, Instructional Requirements Templates can be easily imported within multiple courses by authorized users under the **Requirements** node under the **Media Analysis** folder.



Similarly, Personnel and Resources Templates can be imported within multiple courses by authorized users under the **Import Cost Data** node under the **Cost Analysis** folder.



As you may have also noted, Templates and Resources are highly effective in conducting multiple what if scenarios. For example, you can quickly assess personnel/resources requirements and costs needed to run a training program using trainees to instructor ratios of 6:1, 12:1 or 18:1 by simply selecting the corresponding Template and clicking **Save**.

Moreover, the icon indicates that the data is cascading from the Template to the Course. In other words, if the costs of purchasing or operating the equipment (hardware) change, by simply updating the costs in the Template, the costs of courses that use this template will be automatically updated. You may of course stop and resume the cascading at any time by clicking on the icon to change to .

Notes:

- Templates can only be shared with Users (Analysts) that are assigned to the same Client.
- Users (Analysts) do not automatically have access to Templates within Clients that they belong to. They only have access to Templates that they manage or that are shared with them.

3.2 Copy Templates & Resources between Clients

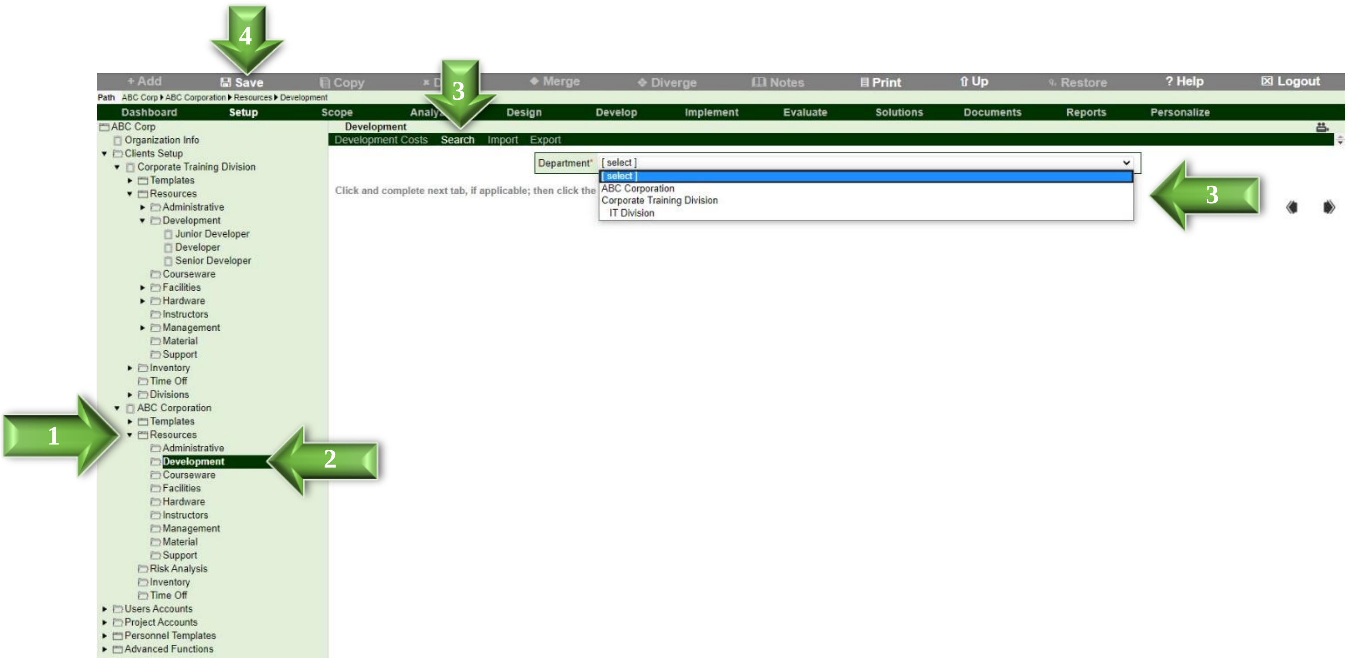
To copy Templates or Resources from other clients:

Step 1: Click on ▶ next to Templates or Resources folder to display the categories.

Step 2: Click on desired category Development, for example.

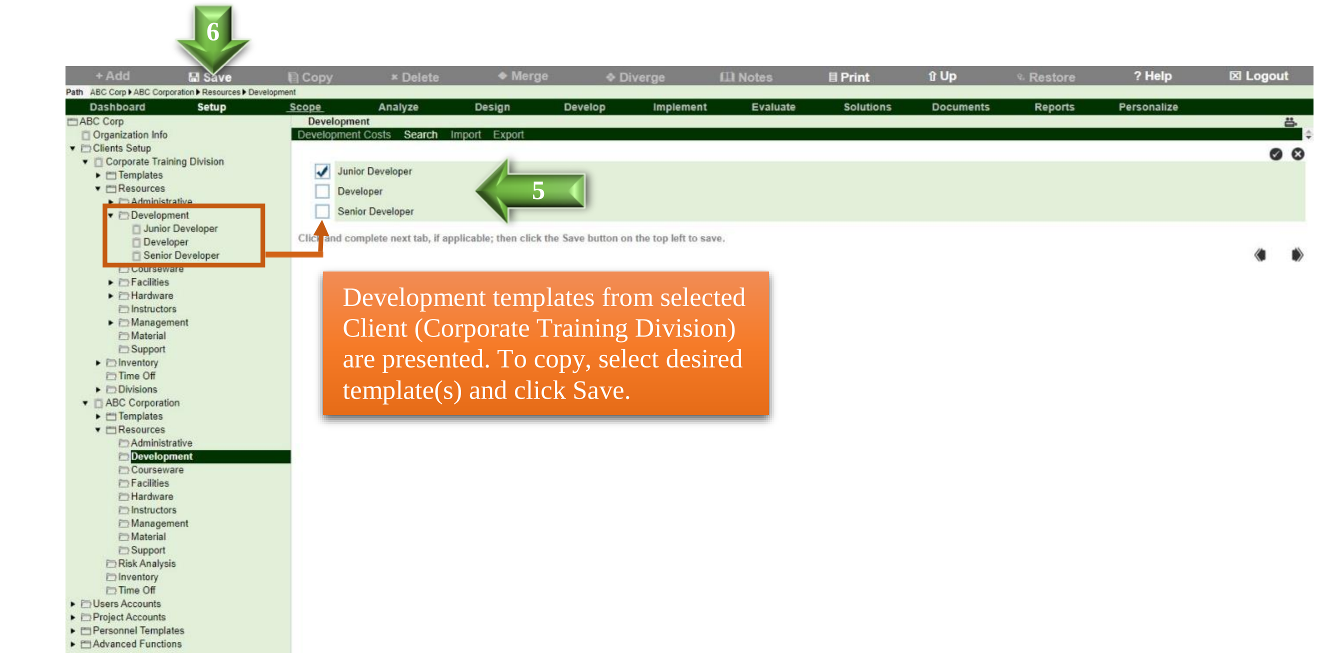
Step 3: Click on [**Search**] tab and Select the Client you wish to copy the Template from.

Step 4: Click [**Save**] to display available templates or resources.

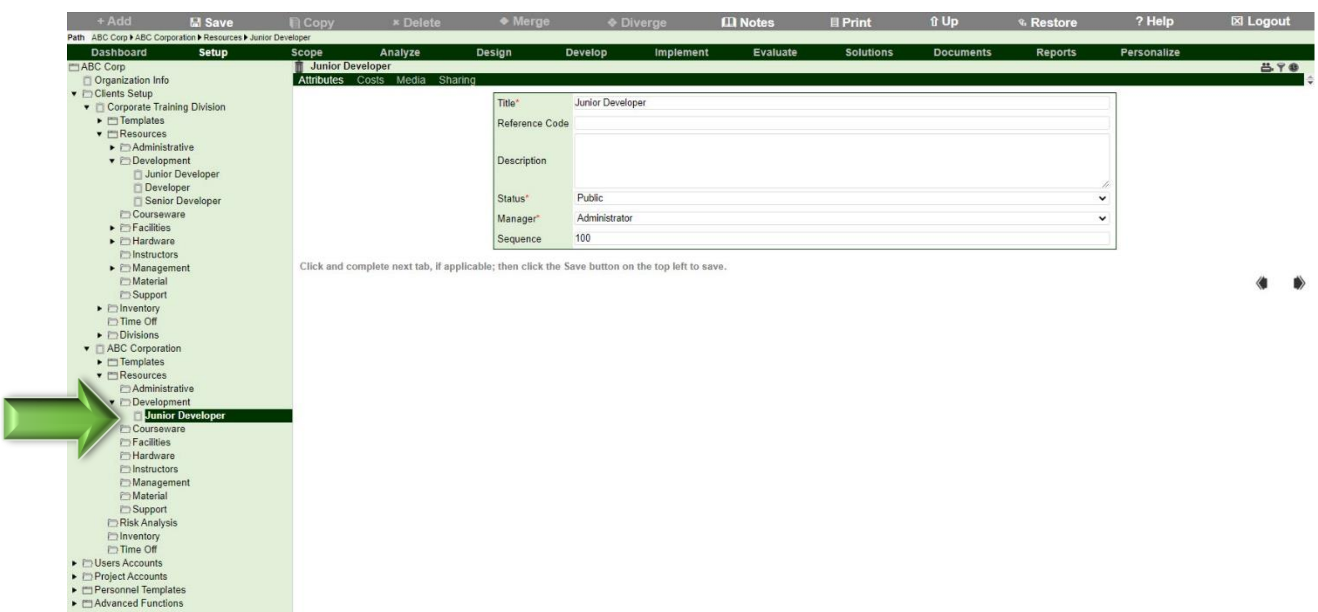


Step 5: Select the Templates/Resources you wish to copy.

Step 6: Click [**Save**] to copy.



A copy of selected Templates will appear under the Client.



Chapter 4: Setup User Accounts

4.1 Setup New User Accounts

Step 1: To setup an account for a new user, click on the Users Accounts folder.

Step 2: Click on [**Add**].

Step 3: Input required information, user's first name, last name, title, password and email under the [**Account**] tab, specify functions that they can perform under the [**Privileges**] tab and which Clients they can support under the [**Clients**] tab. You may also limit access to ADVISOR to a specific time period by specifying an expiry date under the [**Limits**] tab. If no date is specified, User's account will expire with the organization, if ADVISOR is licensed on annual basis. Additional details on setting up Privileges, Clients and Limits are provided below.

User Login is automatically generated, once you click [**Save**]. By default, User Login is composed of individual's first initial and last name. Since each user requires a unique User Login, if the User Login already exists a digit is added.

Users may edit their Login and Password by clicking on the Preferences node under the Personalize folder under [**Personalize**] tab after they have logged in ADVISOR. Data required by ADVISOR is identified by a red asterisk (*).

Step 4: Click on [**Save**].

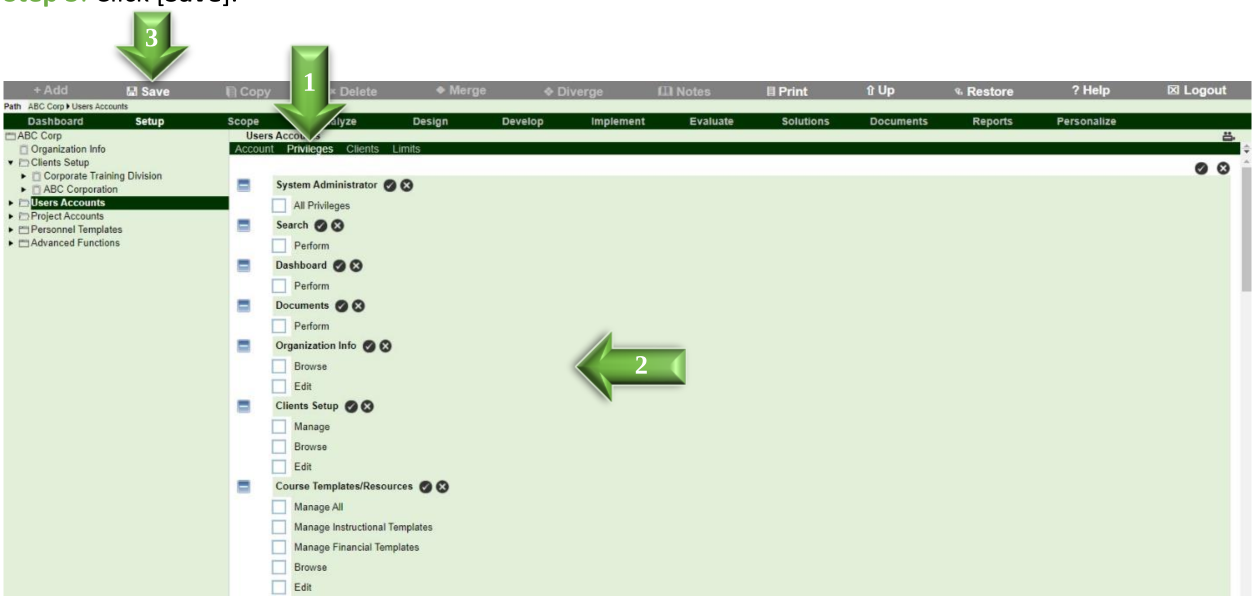
Assign Privileges: To indicate what the User can or cannot do,

Step 1: Click on the [**Privileges**] tab

Step 2: Place checkmarks next to the desired options. By default, no privileges are assigned to new users. The System Administrator privilege on the other hand, provides the User with access to all data. A brief description of each function can be viewed by clicking on [**Help**]. Hard copy is also included in Annex A of "ADVISOR Configuration" User Guide.

<u>Implication:</u> If User can Browse, but not Edit, Manage or Perform a function, then the information is presented in a "read only" mode. If on the other hand, no privileges are assigned for a particular function, Organization Info, for example, than the corresponding node(s) - **Organization Info** in this case – will not be presented to the User. In other words, ADVISOR will automatically hide all nodes/functions that Users do not have access to.

Step 3: Click [**Save**].



Privileges can be very effective in:

- Managing tasks within the organization. For example, by assigning the Browse Clients Setup and Manage Financial Templates privileges to a financial analyst, the financial analyst, in this case, will be limited to setting up Cost Templates for the Clients – but cannot edit or create new Clients. This function may be assigned to another individual or performed by System Administrator.
- Simplifying the use of ADVISOR and streamlining the interface by only assigning relevant functions to each User.

Assign User to Clients

Step 1: To indicate which Client(s) the User is assigned to, click on the [**Clients**] tab and place checkmarks next to the corresponding Client(s). By default, new users are not assigned to any Client.

Implication: User can only share data (course analysis, for example) with other Users working with the same Client. Moreover, User's privileges can only be exercised for the specific Client(s) that they are assigned to. For example, if George Smith is assigned to Army (client), and his privileges allow him to manage financial templates, then he can only manage the Army's financial templates.

Step 2: Click [**Save**] to assign the user to specific clients.

Limit User's Storage/Access

The following restrictions can also be imposed on Users' Accounts under the [**Limits**] tab:

Number of Courses	The maximum number of courses the User can manage at a time. It does not limit the number of analysis that a user may perform, simply the number of analysis that can be saved at any one time. For example, if 5 courses are assigned to John Smith, then John Smith can analyze as many courses as he needs, but can only save the results of 5 courses at a time. In other words, once John Smith reaches the 5 courses limit, he can delete a course and utilize the freed up space to analyze another course. If no courses are assigned, then the number of courses licensed by the organization limits the combined number of courses managed by all Users.
Expiry Date	To provide temporary access to a partner or a consultant, for example, specify the expiry date for the account. In other words, the User will not be able to access the system after the expiry date. If no date is specified, then the User' account will expire with the organization, if ADVISOR is licensed annually.

Remember that context sensitive help is also available for each screen by clicking on [**Help]** and video clips on how to perform specific functions by clicking on the icon. Once ADVISOR is configured in line with needs, you can start your Analysis! Check out the Analysis Step-by-Step Guide as well as other Guides at http://www.bnhexpertsoft.com/user-guides-version-12/.

Enjoy!