ADVISOR ENTERPRISE

Plan better… Achieve more!

Mission Analysis 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: Setup Projects

1.1 Introduction

ADVISOR is highly flexible. Based on project requirements, the analysis may start by examining Missions/ Goals, Systems, Competencies, Jobs or combinations. The current guide presents a step-by-step process to assist analysts in conducting Mission/Goal Analysis, Job Analysis and Task Analysis to identify training requirements. Separate Step-by-Step Guides are available for conducting Job Analysis, Competency/ System Analysis, and therefore they will not be explicitly covered in this Step by Step Guide. For details on all analysis covered by ADVISOR Enterprise, please refer to the Training Analysis User Guide. For info on basic functionality and how to configure ADVISOR in line with needs, please refer to the Configure ADVISOR Step by Step or User Guide. Remember that context sensitive help for each screen is also available by clicking on [**Help**].

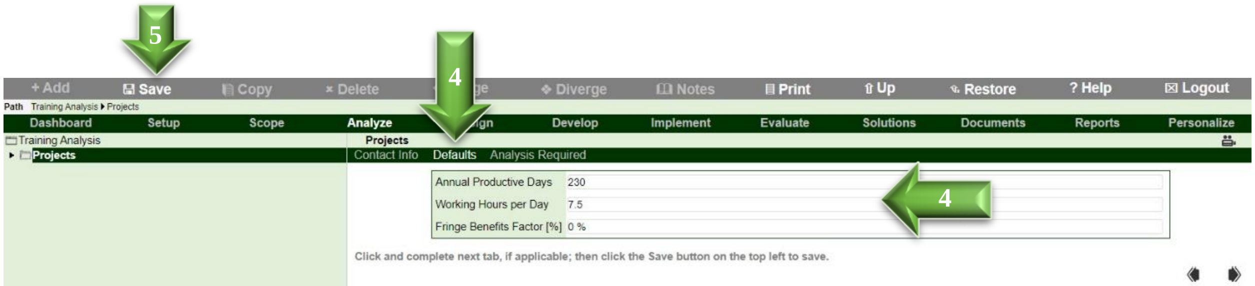
1.2 Setup New Projects

To create a new Project:

Step 1: Click on the Projects folder.
Step 2: Click [**Add**].
Step 3: Input the Project Title, 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 and Fringe Benefits Factor for the project. The Currency and Inflation Rate will cascade from the Client settings.

Implication: Inflation Rates can greatly impact the cost of courses over time. Other default values can improve consistency and save time by populating corresponding values in new projects.



Step 5: Click [**Save**], once all relevant fields are filled out to create the project.

Notes:

- To edit an existing project, click on the **Projects** folder then click on the project's name. Make the required changes 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**].

1.3 Configure Projects

To preserve consistency, all configurations including data to be collected, analysis to be conducted, and reports to be generated cascade from Client's Setup (See Configure ADVISOR: Step-by-Step Guide). To modify the configuration for a specific project:

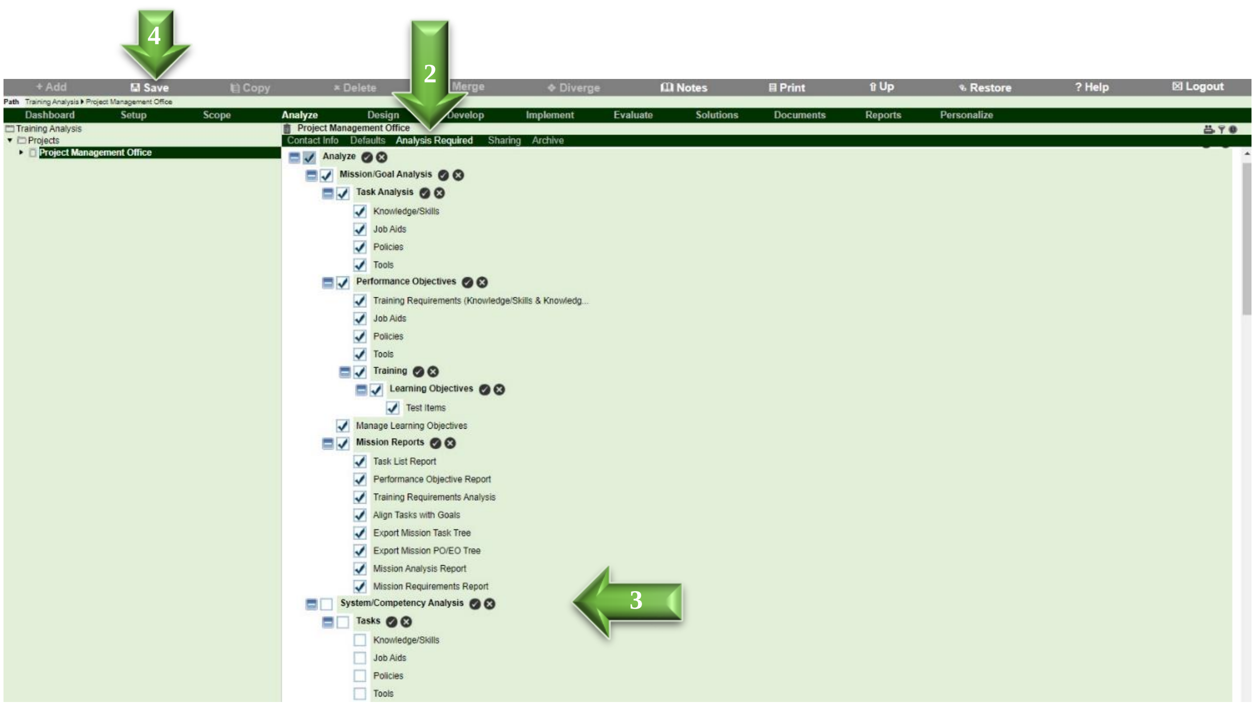
Step 1: Click on the icon to turn the cascade off .

Step 2: To specify data to be collected and analysis to be performed click on the [**Analysis Required**] tab.

Step 3: Place checkmarks next to the required items. Deselected items indicate that the analysis and data are not needed. ADVISOR will, in-turn, automatically hide nodes, tabs and fields that are no longer required, streamline data collection and reduce time required to conduct the analysis – a very effective way to configure ADVISOR in line with your needs.

Step 4: Click [**Save**] to save the configuration.

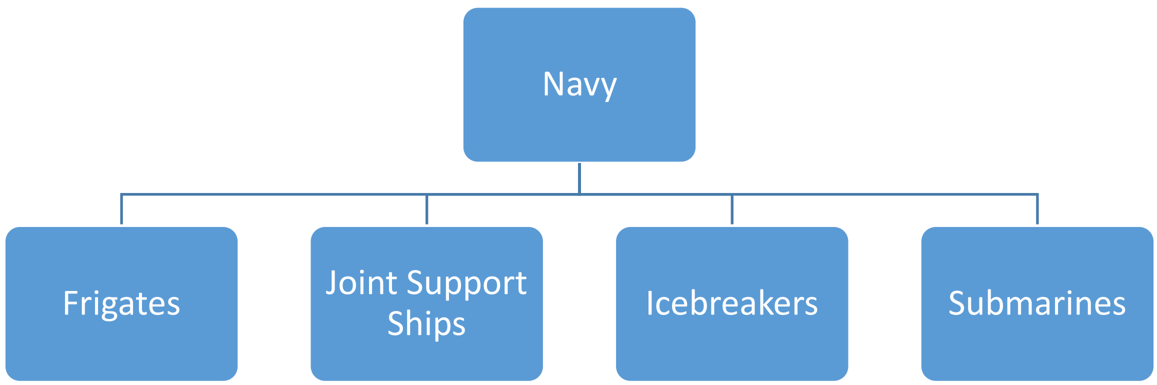
For example, if Mission Analysis is needed but System Analysis is not required, all checkmarks for System related items should be removed, as shown below. You may, of course, reinstate the System Analysis requirement at any time, as the need arises.



Implication: All fields corresponding to data and analysis not required will be automatically hidden for this project. This will in-turn streamline the interface and reduce time needed to conduct the analysis.

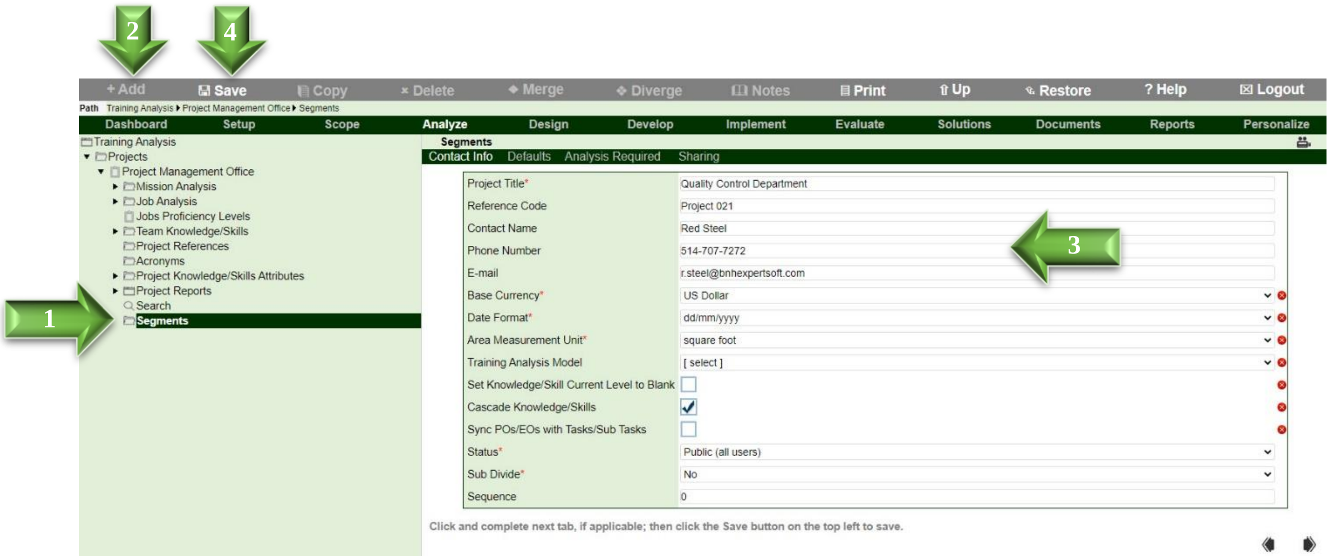
1.4 Setup Project Segments

You may also subdivide and organize the data under each project in various segments, if needed. For example, if the project entails the assessment of training requirements within multiple units, departments, commands or platforms, you may subdivide the project into segments and sub segments, and organize the data accordingly. For example, a corporation (project) may be divided into the following segments: Sales, Marketing, IT, Operations and so forth. A Navy (project) may be subdivided into the following segments: Frigates, Joint Support Ships, Ice Breakers, Submarines, and so forth. Moreover, the impact of missions/goals within each segment (unit) on parent (organization) can also be defined.



To set-up a Segment for a Project:

Step 1: Click on the **Segments** folder under the **Projects** folder.
Step 2: Click [**Add**].
Step 3: Input the Project (Segment) Title, Contact Name and other information.
Step 4: Click [**Save**] to create the Segment.



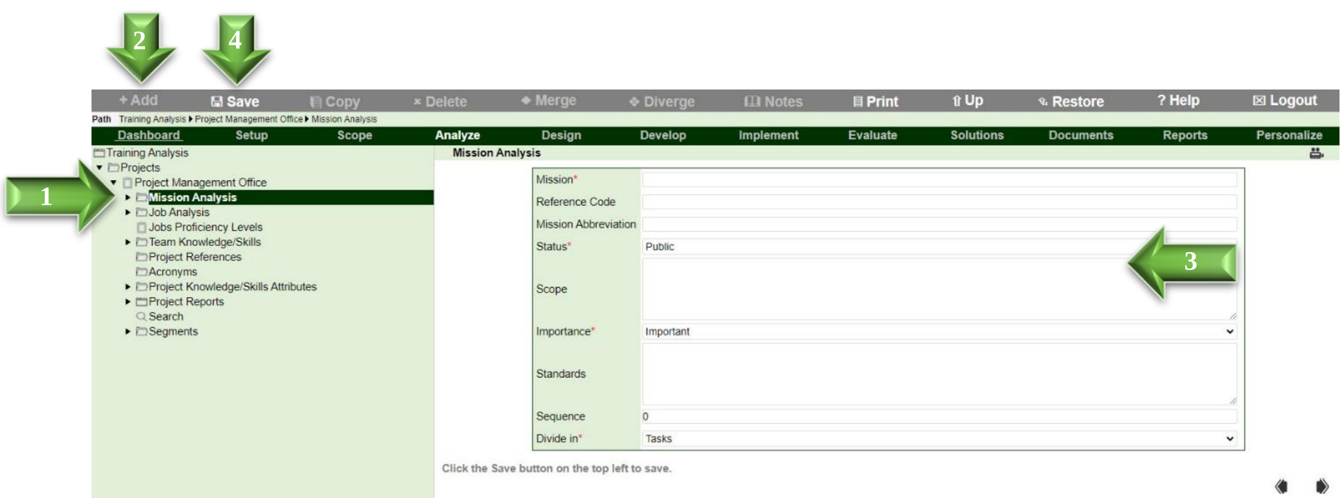
Note: The **Segments** folder will appear once the Sub Divide field under the Project is set to Yes.

Chapter 2: Setup Missions & Goals

2.1 Setup Missions & Goals

To identify the training needed to achieve missions/goals, find out where training budgets and resources should be allocated, as well as maximize training impact and demonstrate value, a clear understanding of missions/goals, tasks required to achieve these goals, as well as knowledge and skills needed to perform these tasks is needed. To identify and prioritize the missions/goals of a project, as well as how the missions/goals of each Segment support parent objectives:

Step 1: Click on the **Mission Analysis** folder under the **(project or segment)** node.
Step 2: Click [**Add**].
Step 3: Input the Mission, Importance, Standards as well as other relevant data.
Step 4: Click [**Save**], once all required information has been input.



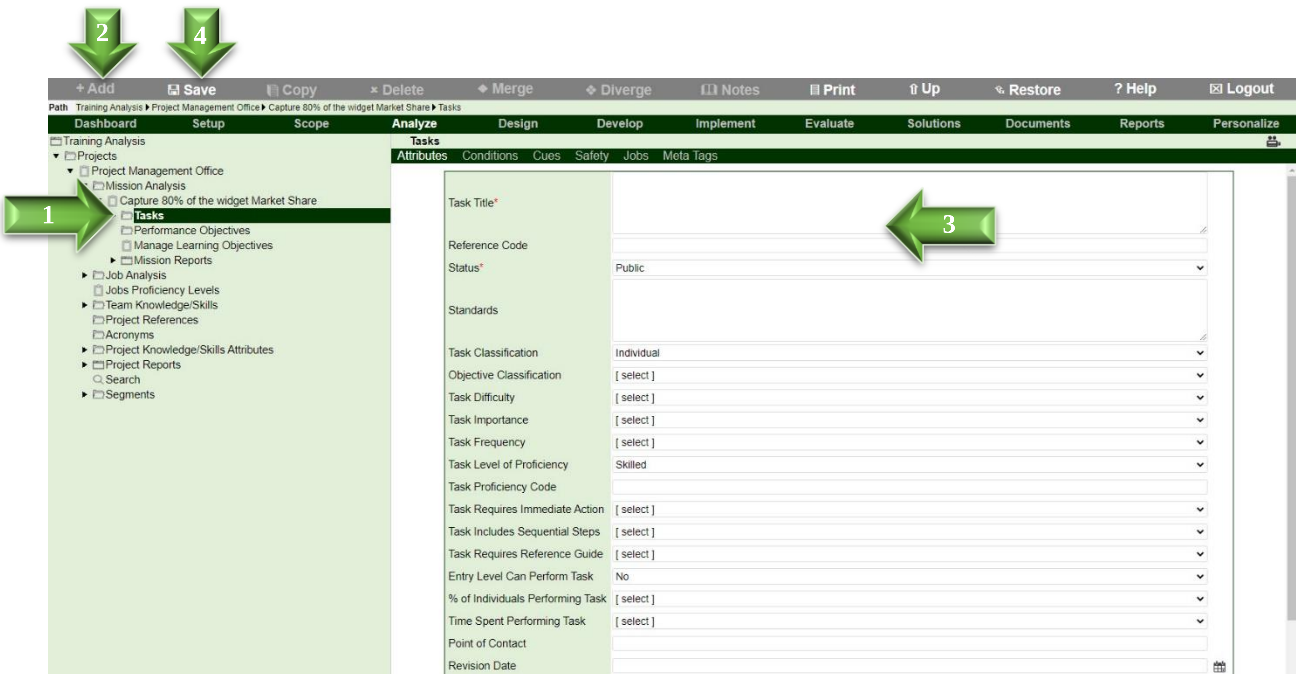
Notes:

- 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 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 of the Segments.

2.2 Define Missions Tasks

To identify the actions needed to achieve project's missions or goals, Tasks can be defined. Tasks can in-turn be divided into Sub Tasks, Steps, Sub Steps. To define Tasks for Missions/Goals, Segments, Sub Segments and Functions select the Tasks option in the Divide In field. To add a new Task:

Step 1: Click on the Tasks folder.
Step 2: Click [**Add**].
Step 3: Input the Task Title, Standards, Difficulty, Importance and Frequency as well as other attributes.
Step 4: Click [**Save**], once all required information has been input.



Notes:

- If Jobs have been defined under the Job Analysis folder (Section 3.1), the [**Jobs**] tab is displayed to allow Users to indicate who will be performing the Task. Each of the top three Task levels can be assigned to multiple Jobs.

- Five models are incorporated in ADVISOR to assess the training requirement for each Task as well as its priority based on Task Difficulty, Importance and Frequency. Factors considered in each of the models including decision matrix are presented in Section 3.4 of Training Analysis User Guide.

- Each time a Task is added, they are automatically compiled under the Project Tasks folder.

- To minimize duplication, in lieu of adding tasks, user may review Tasks under Project Tasks folder, by clicking on the [**Select**] tab under Tasks folder, placing checkmarks next to the required Tasks and clicking [**Save**] to add the Task.

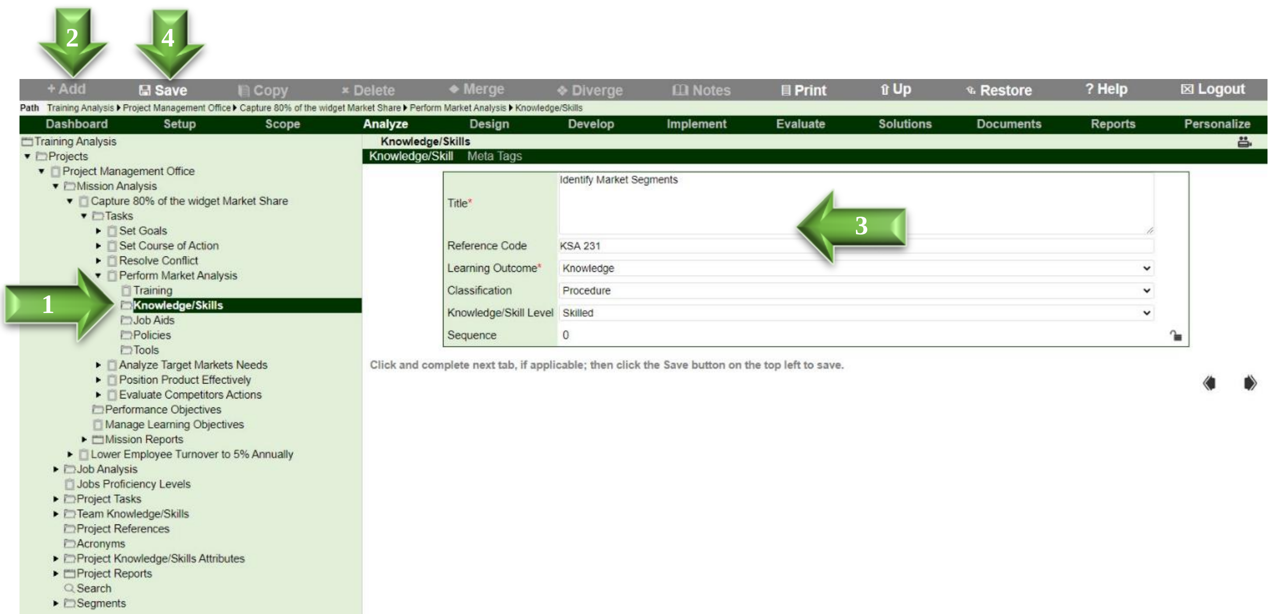
➢ To facilitate data sharing and minimize the analysis effort, Users can search for and copy Tasks including attributes and hierarchy using the [**Search**] tab under the **Tasks** folder. Once again, please note that this does not imply that you can modify the original data.

➢ To edit the attributes of multiple Tasks, the Edit All function may be used.

2.3 Identify Knowledge, Skills and Attitudes

To identify knowledge, skills and attitudes needed to perform the Task to the desired level:

Step 1: Click on the **Knowledge/Skills** folder under the **(task)**.
Step 2: Click [**Add**].
Step 3: Input the Knowledge, Skill or Attitude title, Learning Outcome, Classification and Knowledge/Skill Level.
Step 4: Click [**Save**] to create.



Notes:

➢ Identifying knowledge, skill and attitude requirements for each Task will greatly simplify the process of uncovering knowledge/skill gaps – i.e., training needed.

➢ Each time a Knowledge, Skill or Attitude is added, they are automatically compiled under the **Team Knowledge/Skills** folder.

➢ To minimize duplication, in lieu of adding knowledge or skills, user may review Knowledge, Skills or Attitudes under **Team Knowledge/Skills** folder, by clicking on the [**Select**] tab under **Knowledge/Skills** folder, placing checkmarks next to the required Knowledge/Skills and clicking [**Save**] to add under the Task.

2.4 Create/Manage Performance and Enabling Objectives

Tasks/Behaviors refer to activities that individuals are expected to perform in order to achieve a mission. Although individuals may require training on some Tasks in order to master, simpler Tasks with minimal impact may not require any training. In general, Performance Objectives can be viewed as Tasks that require training.

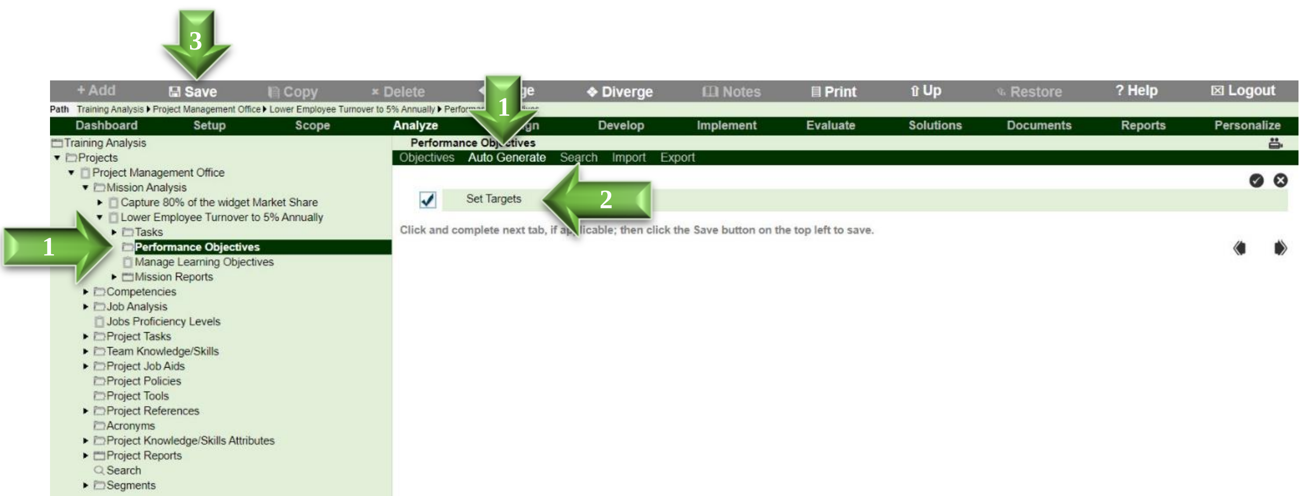
Auto Generate Performance Objectives

To facilitate the creation of Performance and Enabling Objectives, Mission Tasks are presented under the [**Auto Generate**] tab under the **Performance Objectives** folder. To create:

Step 1: Click on the [**Auto Generate**] tab.

Step 2: Place checkmarks next to Tasks that require training.

Step 3: Click [**Save**] to automatically generate the corresponding Performance Objectives under the **Performance Objectives** folder. Sub Tasks are in-turn converted into Enabling Objectives. In addition to cascading the attributes of each Task and Sub Task to the corresponding Performance and Enabling Objective, associated Knowledge, Skills, Job Aids, Policies and tools will also be transposed.



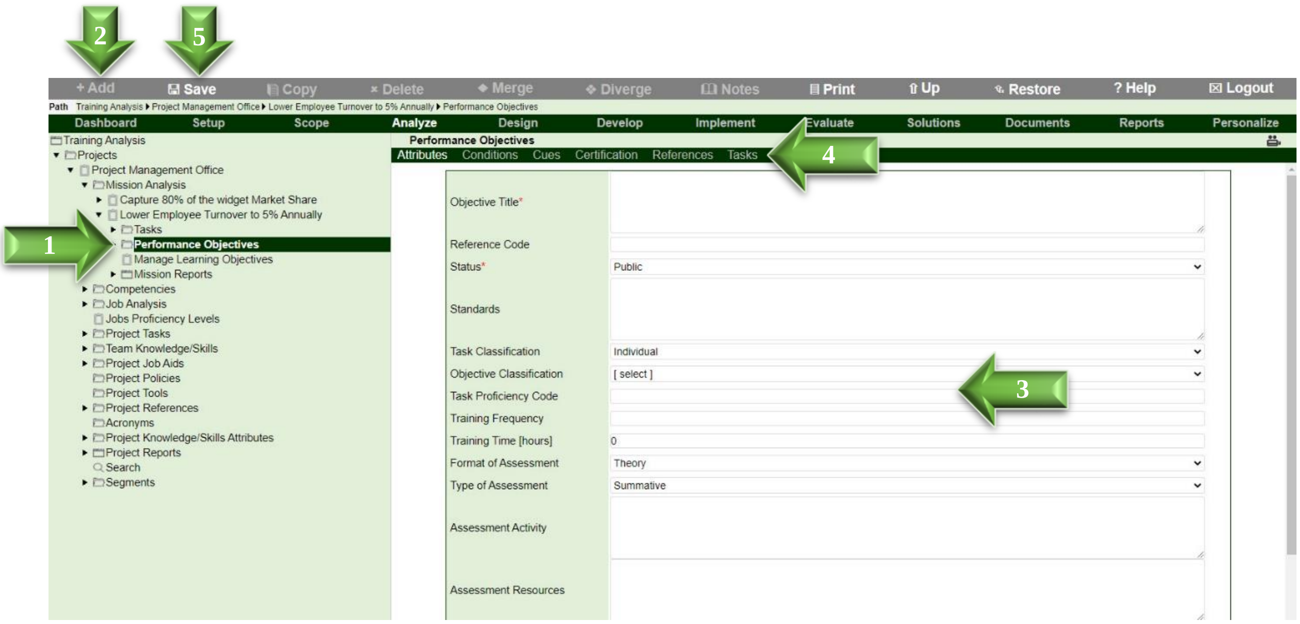
Note:

- To preserve data integrity, should Mission Task attributes change, they will automatically cascade to all corresponding Performance Objective attributes if the cascade option is turned on. You may of course turn the cascade option off, to make changes to the Performance Objective.

Create New Performance Objectives

To add a new Performance Objective:

Step 1: Click on the **Performance Objectives** folder under the **(Mission)** node.
Step 2: Click [**Add**].
Step 3: Input the Objective Title, Standards, as well as other attributes.
Step 4: Click on the [**Conditions**], [**Cues**], [**Certification**] and [**Tasks**] tabs, and complete.
Step 5: Click [**Save**] to create the Objective.



<u>Notes:</u>

- Objective Training Requirements and Priority are dictated by the Task or Sub Task that the Objective supports – indicated under Align Attributes with Task field. They are presented under the **Training** node under each **(objective)**.

- <u>Sub Divide Objective</u>: Performance Objective can also be divided into Enabling Objectives. Enabling Objectives can be further divided into Steps, and Steps into Sub Steps.

- <u>Status</u>: To minimize the effort required to analyze Objectives, you can permit other Users to find, copy and reuse the Performance Objective by setting its **Status** to **Public**. This does not imply that other Users can review or edit your Objective. It simply implies that they can reuse. To exclude the Objective from the Search function, set its Status to **Private**.

- Search. To minimize the analysis effort, a [**Search**] tab is presented on the **Performance Objectives** folder. You can search for Performance Objectives by Mission, System, Competency, Job or 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.

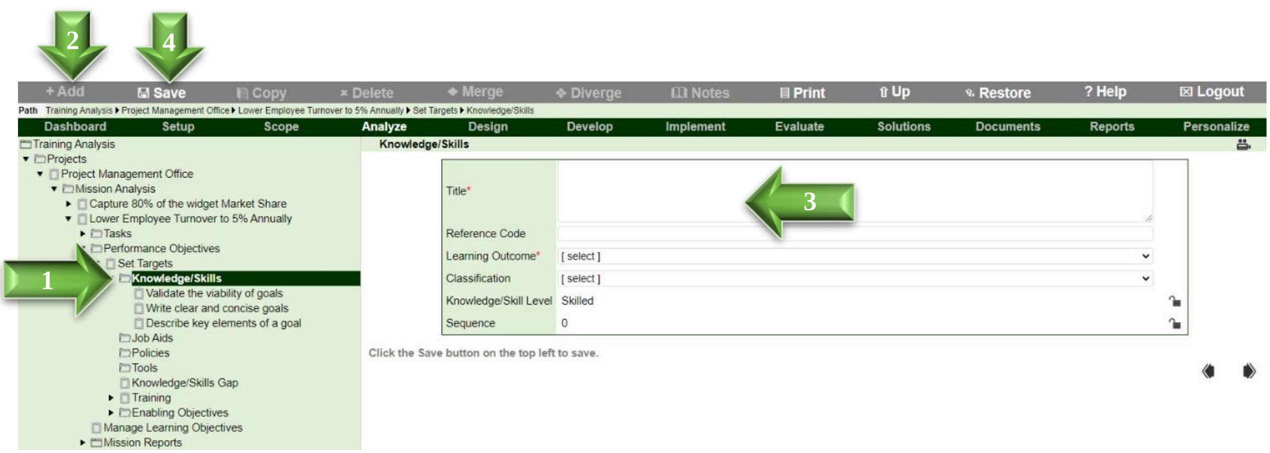
- If References have been defined under the **Project References** folder (Section 6.2 of Training Analysis User Guide), a [**Reference**] tab will also appear after the [**Certification**] tab. Click the [**References**] Tab, select relevant References and click [**Save**] to link Objectives to specific mandate, requirement, manual, etc., and in-turn document the reasoning behind the Objective.

2.5 Uncover Training Requirements

Define POs/EOs Knowledge/Skills

If the Performance Objective was created using the [**Auto Generate**] tab, then all KSAs associated with the corresponding Task will be automatically copied to the **Knowledge/Skills** folder. Otherwise you can define the required Knowledge and Skills for the Performance Objective as follows:

Step 1: Click on the **Knowledge/Skills** folder.
Step 2: Click [**Add**].
Step 3: Input the Knowledge/Skill Title, Learning Outcome, Classification and Knowledge/Skill Level.
Step 4: Click [**Save**] to create.



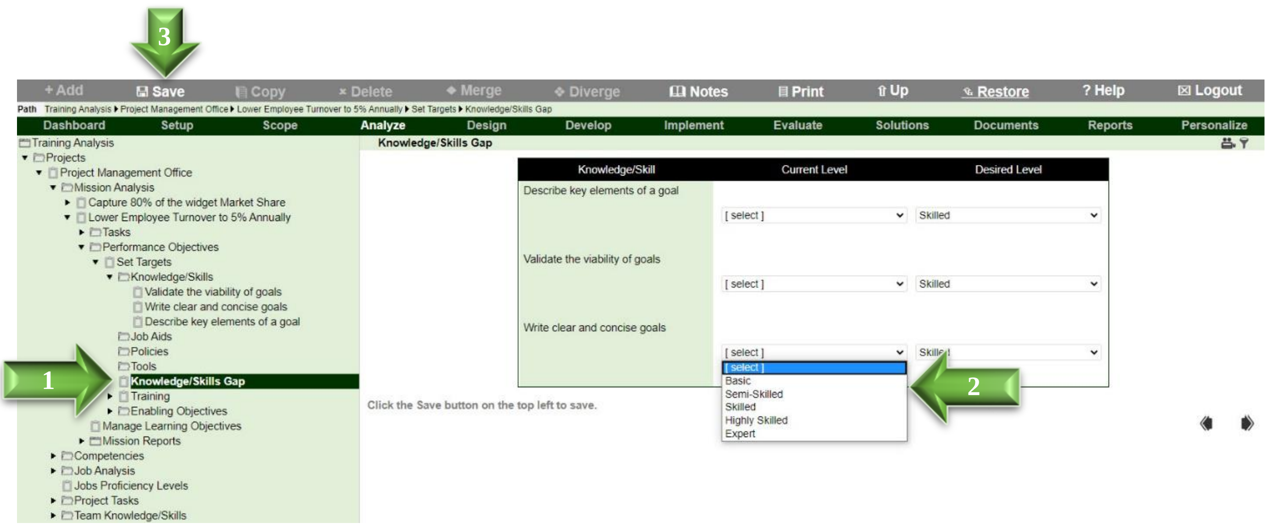
Note:

- Once a Knowledge or Skill is created, the **Knowledge/Skills Gap** node is presented under the Performance Objectives folder to identify Knowledge/Skill Gaps.

Identify Knowledge/Skill Gaps

To identify Knowledge and Skill gaps:

Step 1: Click on the **Knowledge/Skills Gap** node.
Step 2: Indicate the Current Knowledge/Skill Levels.
Step 3: Click [**Save**].



Note

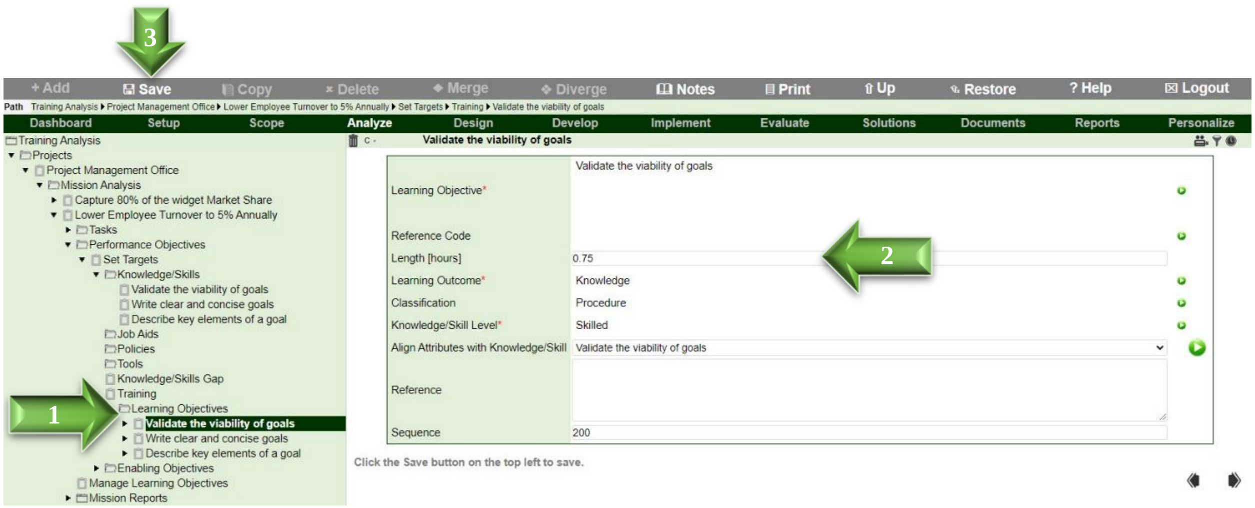
- If Desired Level exceeds Current Level, a Knowledge/Skill gap is identified; and a Learning Objective is automatically created under the **Learning Objectives** folder under the **Training** node.
- The background of the Knowledge/Skill changes to green to indicate that a Learning Objective has been setup to address this gap.
- To indicate how the Knowledge/Skill Gap will be addressed, click on the **Training** node, and select Formal Training, Workplace Training or Residual Training Gap under the Training Allocation field.

Define Learning Objectives

You may create multiple Learning Objectives (Teaching Points) to address a single Knowledge/Skill Gap. Each Learning Objective should specify the conditions under which knowledge and skills should be exhibited, the standard to which it will be performed and reflect the gap between current and desired level.

To indicate the time needed to close the Knowledge/Skill Gap:

Step 1: Click on the **(learning objective)** node under the **Learning Objectives** folder.
Step 2: Input the Length and edit the Title if required.
Step 3: Click [**Save**].



Notes:

- To add a new Learning Objective (Teaching Point), click on the **Learning Objectives** folder, and then click [**Add**]. You will be prompted for the Learning Objective Title, Length, Learning Outcome, Classification and Knowledge/Skill Level. Input the required fields and click [**Save**].

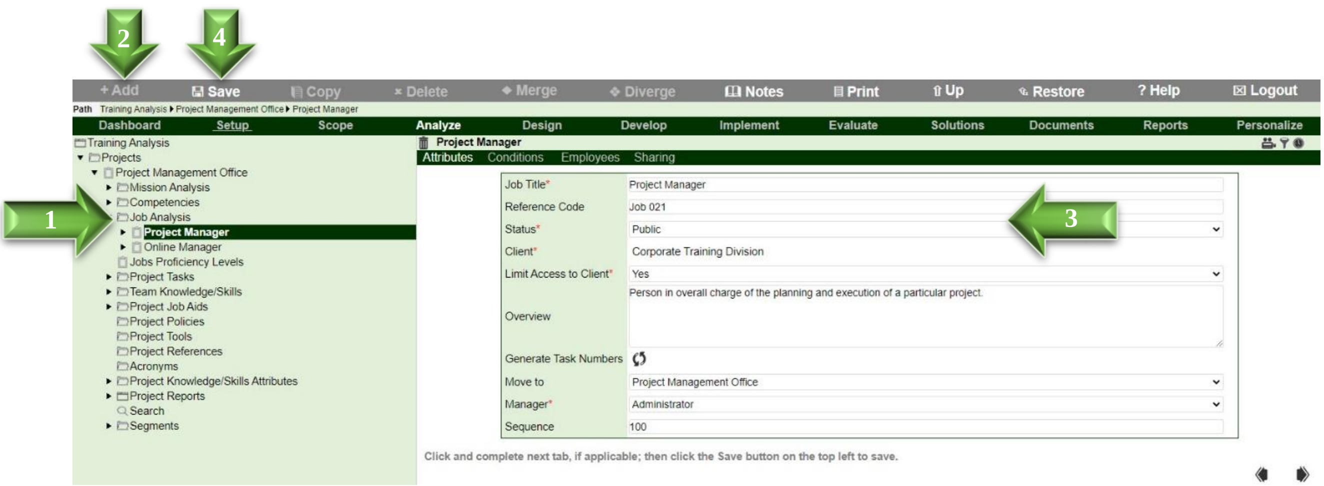
- Learning Objectives can be assembled in Courses/Training Programs. Defining Learning Objectives is in turn critical for establishing clear links between Training Programs, Objectives, Tasks, Jobs and Missions/Goals, demonstrating the value of various training programs and aligning training with organizational missions/goals.

Chapter 3: Setup Jobs

3.1 Setup Jobs

To identify Jobs needed to achieve projects' missions/goals:

Step 1: Click on the Job Analysis folder.
Step 2: Click [**Add**].
Step 3: Input the Job Title, a brief overview as well as other relevant data.
Step 4: Click [**Save**] to create the job.



Notes:

- To facilitate the analysis process, public Job Analyses (defined under Status field) are made available to other users (analysts) under the [**Search**] 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**]

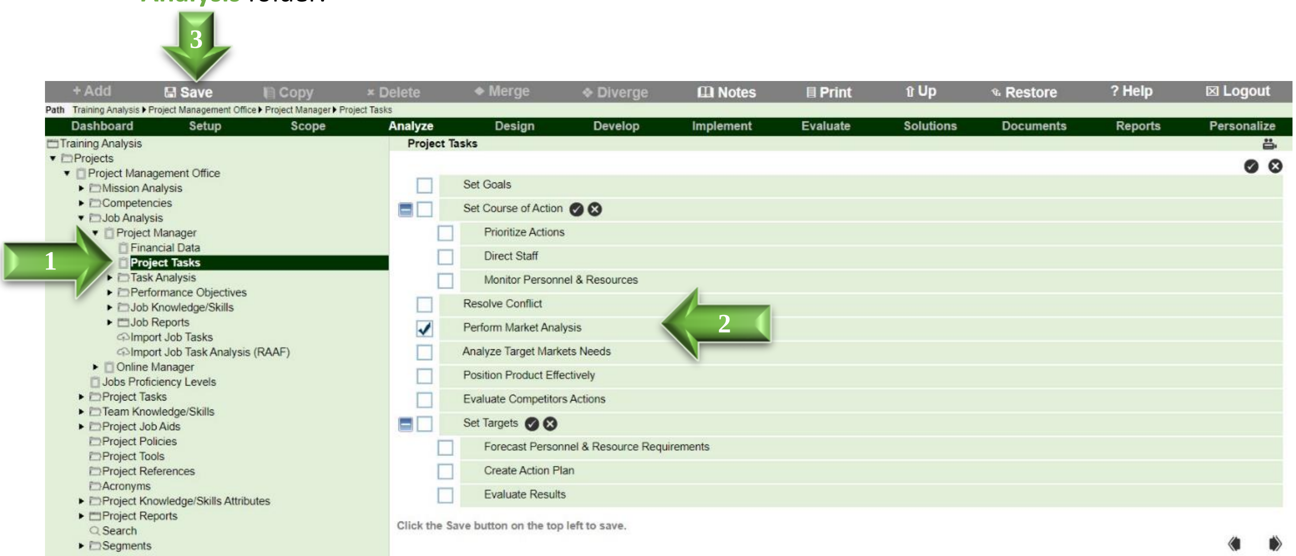
3.2 Setup Job Tasks

The tasks for each Job can be assembled from existing Mission Tasks or new tasks can be defined directly under the Job.

Assign Mission Tasks

To assign Mission Tasks, previously defined under the Mission (Section 2.2) to Jobs, simply:

Step 1: Click on the **Project Tasks** node underneath the respective **(job)** node.
Step 2: Select the Tasks you which to assign to the Job.
Step 3: Click [**Save**]. The tasks, along with their attributes, will automatically be copied to the **Task Analysis** folder.



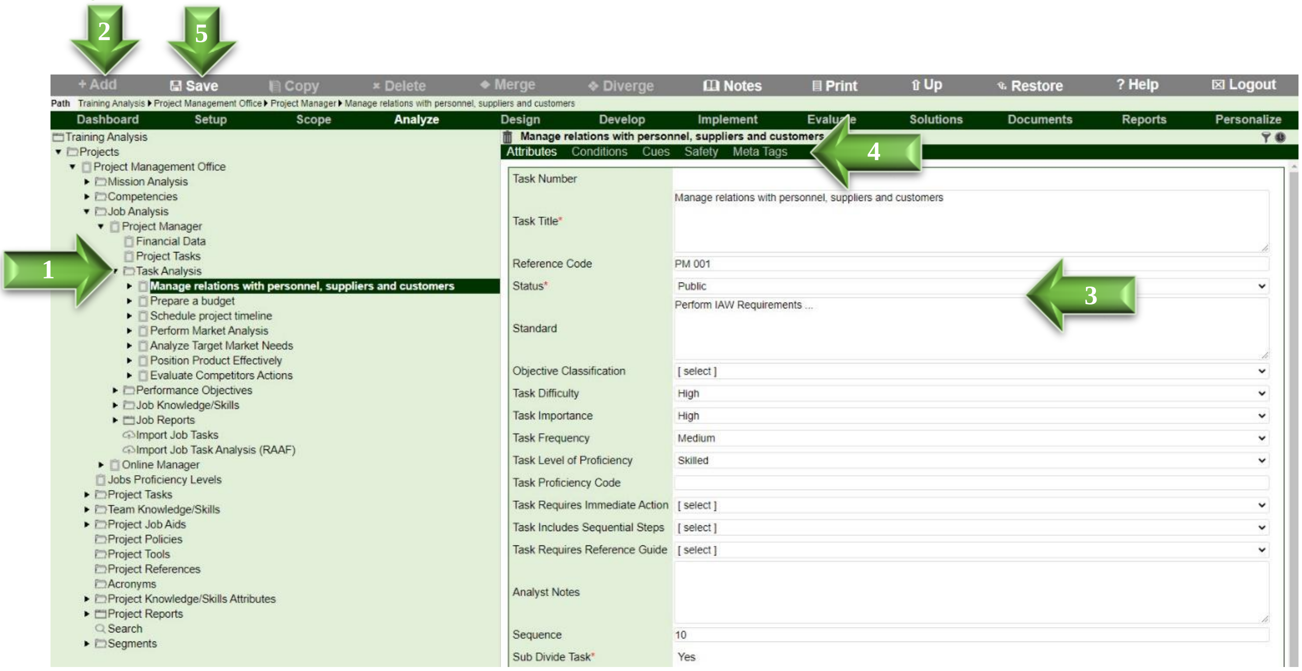
<u>Note:</u>

- Tasks may already be selected, if the job was selected under the [**Jobs**] Tab under the **Mission Task** node (Section 2.2). In this case, simply click [**Save**] to copy the tasks to the **Task Analysis** folder.

Create New Job Tasks

To create a new task simply:

Step 1: Click on the **Task Analysis** folder under the **(job)** node.
Step 2: Click [**Add**].
Step 3: Input the Task Title, Difficulty, Importance, Frequency as well as other attributes.
Step 4: Next, click on the [**Conditions**], [**Cues**] and [**Safety**] tabs and complete.
Step 5: Click [**Save**] to create task.



Notes:

- Based on Task's Difficulty, Importance and Frequency (DIF), Task Priority and Training Requirements 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 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. 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 by Mission, System, Competency, Job or 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 **Project References** folder (Chapter 6 of Training Analysis User Guide), a [**Reference**] tab will also appear after the [**Safety**] tab. Click the [**References**] tab, select References and click [**Save**] to link Tasks to specific mandate, requirement, manual, etc., and in-turn document the reasoning behind the Task.

3.3 Define Performance and Enabling Objectives

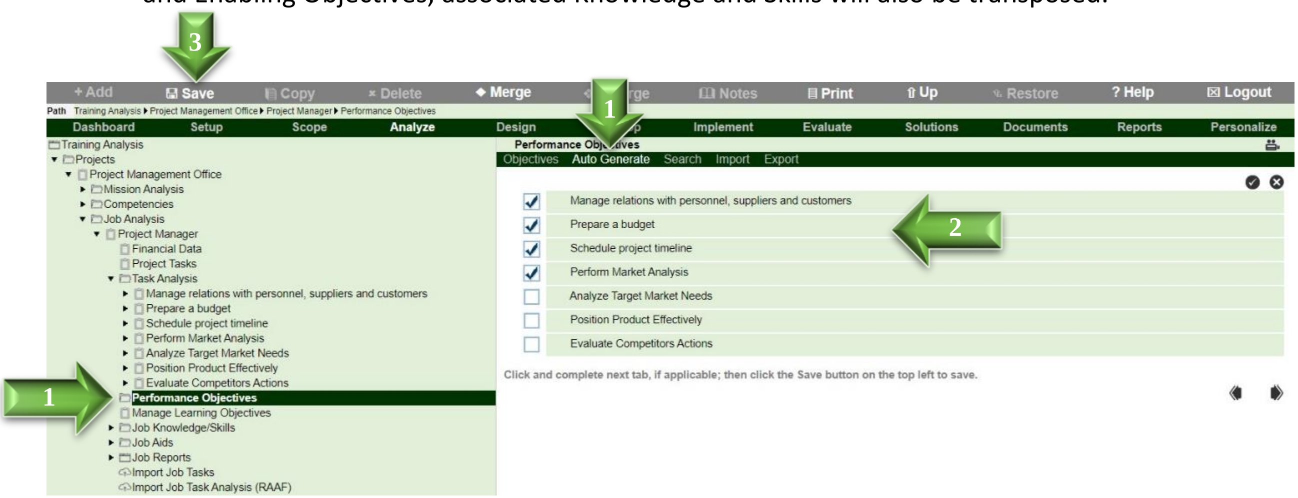
Auto Generate Performance Objectives

Tasks refer to activities that individuals are expected to perform on the job. Although individuals may require training on some Tasks in order to master, simpler Tasks with minimal impact may not require any training. In general, Performance Objectives can be viewed as Tasks that require training.

Step 1: Click the [**Auto Generate**] tab under the Performance Objectives folder. To facilitate the creation of Performance and Enabling Objectives, Job Tasks are presented under this tab.

Step 2: Place checkmarks next to Tasks that require training.

Step 3: Click [**Save**] to automatically generate the corresponding Performance Objectives under the Performance Objectives folder. Sub Tasks are in-turn translated into Enabling Objectives. In addition to cascading the attributes of each Task and Sub Task to the corresponding Performance and Enabling Objectives, associated Knowledge and Skills will also be transposed.



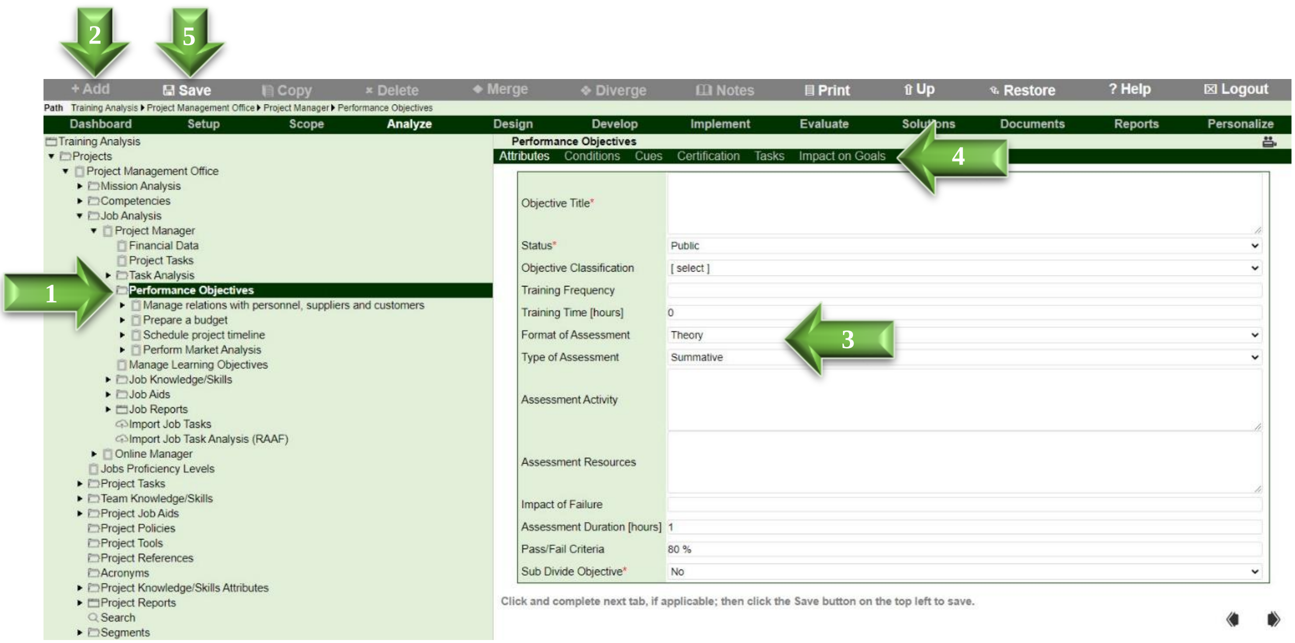
Note:

- To preserve data integrity, should the Job Task attributes change, they automatically cascade to all corresponding Performance Objective when the cascade option is turned on. You may of course turn the cascade option off, to make changes to the Performance Objective.

Create New Performance Objectives

To manually add Performance Objectives:

Step 1: Click on the Performance Objectives folder under the (job) node.
Step 2: Click [**Add**].
Step 3: Input the Objective Title, Standards, as well as other attributes.
Step 4: Next, click on the [**Conditions**], [**Cues**], [**Certification**], [**Tasks**] and [**Impact on Goals**] tabs and complete.
Step 5: Click [**Save**], when ready, to create the Objective.



Notes:

- Objective Priority and Training Requirements are dictated by Task or Sub Task that the Objective supports – i.e., indicated under the Align Attributes with Task field. 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. 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. Analysts can only search for and copy Objectives (but not edit or delete) that are classified as Public under the Status field. If the Performance Objective is classified as Private, it will not 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.

- Search. To facilitate the analysis, a [**Search**] tab is also presented on the **Performance Objectives** folder. You can search for Performance Objectives by System, Competency, Job or 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.

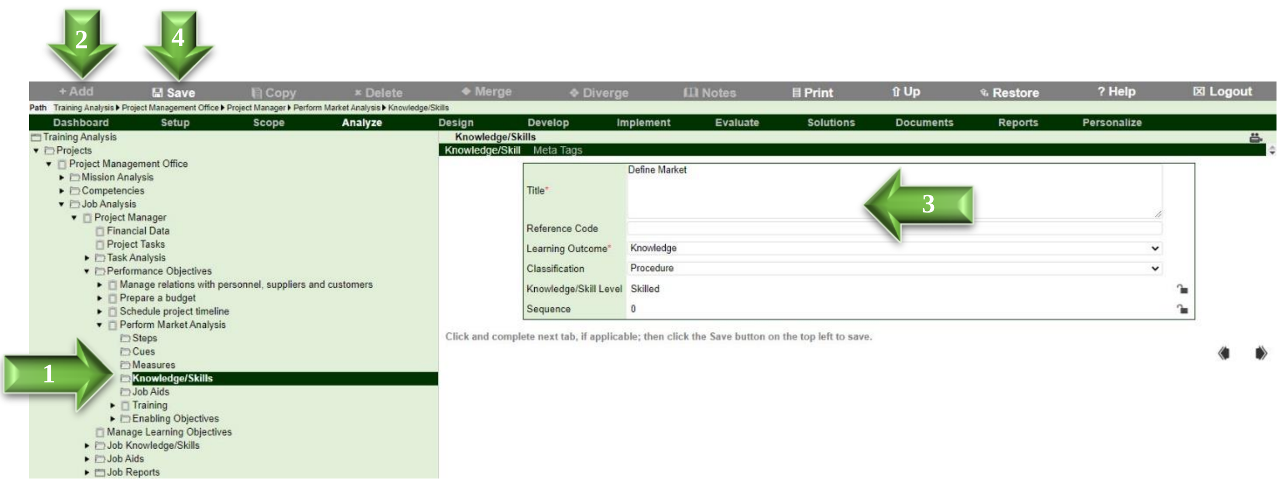
- If References have been defined under the **Project References** folder, a [**Reference**] tab will also appear after the [**Certification**] tab to link Objectives to specific mandate, requirement, manual, etc. By establishing these links, in addition to documenting the reasoning behind the Objective, analysts can quickly identify which Objectives (including Knowledge, Skills and Attitudes) are affected – should there be a change in a specific mandate, requirement or manual.

3.4 Uncover Knowledge and Skill Gaps

Define POs/EOs Knowledge/Skills

If the Performance Objective was created using the [**Auto Generate**] tab, then all associated KSAs of the Task will be automatically copied to the Knowledge/Skills folder. Otherwise you can define the required knowledge and skills for the performance objective as follows:

Step 1: Click on the Knowledge/Skills folder to identify Knowledge/Skills needed to perform Objective.
Step 2: Click [**Add**] to define necessary KSAs.
Step 3: Input the Knowledge/Skill Title, Learning Outcome, Classification and Knowledge/Skill Level.
Step 4: Click [**Save**].



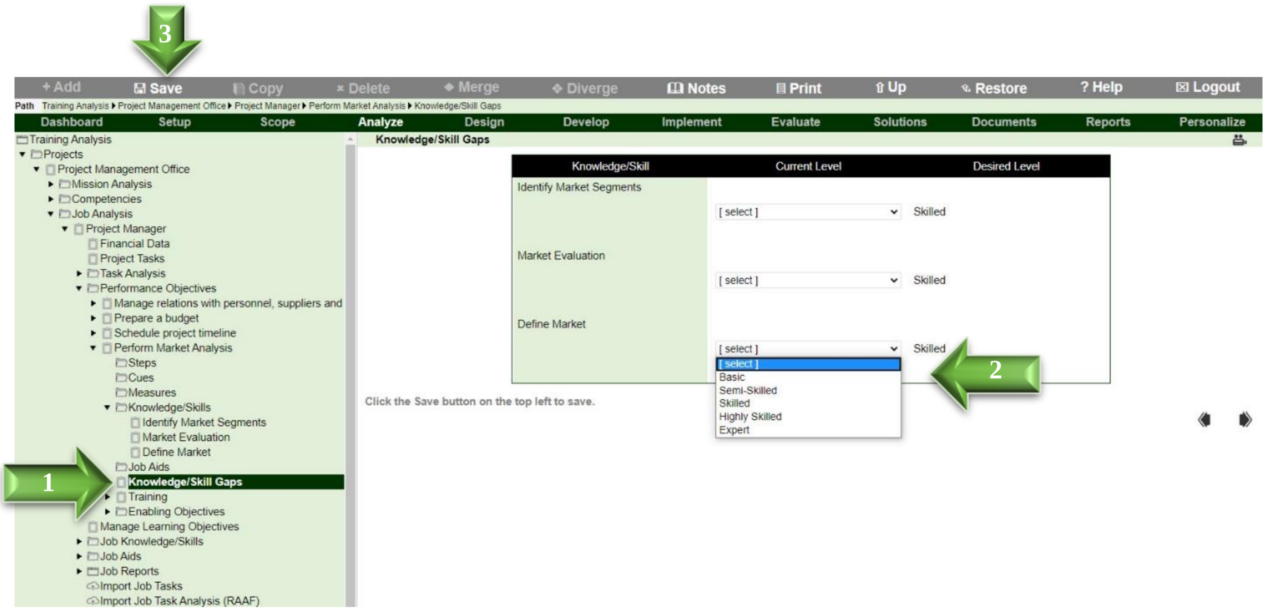
Note:

- Once a knowledge or skill is defined, the Knowledge/Skills Gap node is presented under the Performance Objectives folder to identify knowledge/skill gaps.

Determine Knowledge/Skills Gaps

To identify knowledge and skill gaps:

Step 1: Click on the **Knowledge/Skills Gap** node.
Step 2: Indicate the job's current knowledge and skill levels.
Step 3: Click [**Save**], to save the Knowledge Skills Gap Analysis.



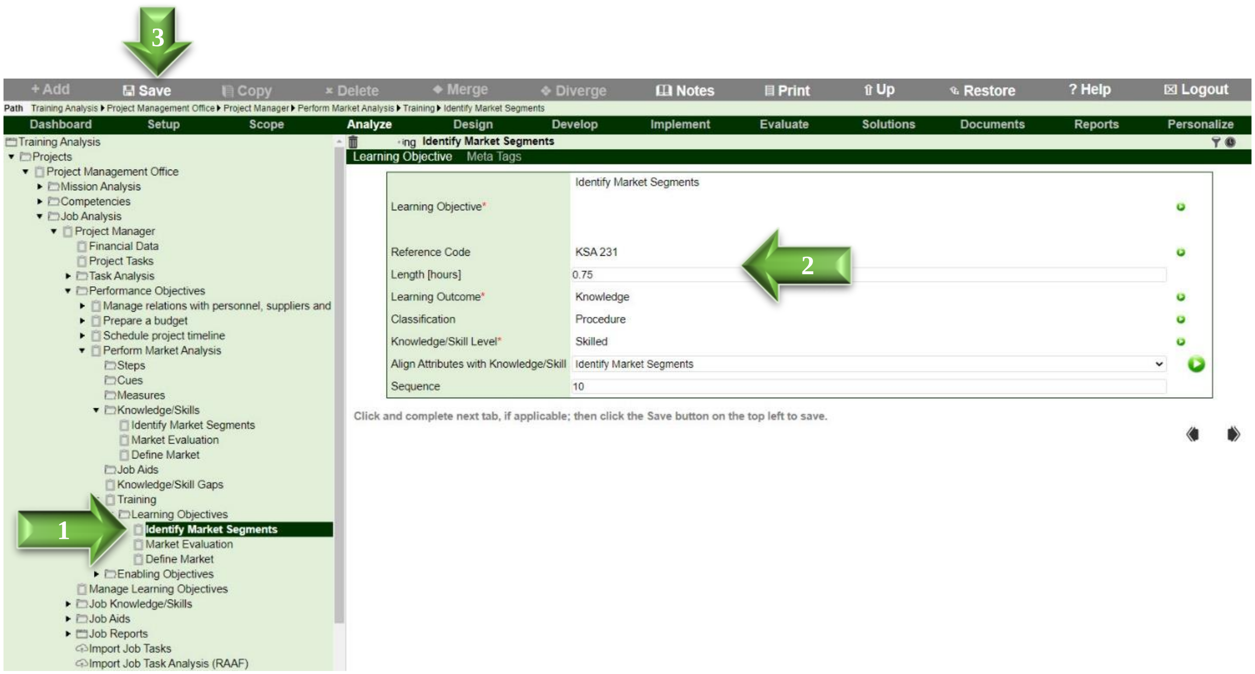
Notes:

- If desired level exceeds current level, a Knowledge/Skill gap is identified; and a Learning Objective is automatically created under the **Learning Objectives** folder under the **Training** node.
- The Knowledge/Skill background changes to green to indicate that a Learning Objective has been setup to address the gap.
- To indicate how the Knowledge/Skill Gap will be addressed, click on the **Training** node, and select Formal Training, Workplace Training or Residual Training Gap.

Define Learning Objectives

You may create multiple Learning Objectives (Teaching Points) to address a single knowledge/skill gap. The Learning Objectives should specify the conditions under which knowledge and skills should be exhibited, the standard to which it will be performed and reflect the gap between current and desired level. To indicate time needed to close the Knowledge/Skill Gap:

Step 1: Click on the **(learning objective)** node under the **Learning Objectives** folder.
Step 2: Input the Length and edit the Title if required.
Step 3: Click [**Save**], to save the Learning Objective characteristics.



Notes:

- To add a new Learning Objective (Teaching Point), click on the **Learning Objectives** folder, and then click [**Add**]. You will be prompted for the Learning Objective Title, Length, Learning Outcome, Classification and Knowledge/Skill Level. Input the required fields and click [**Save**].

- Learning Objectives can be assembled in courses/training programs. Defining Learning Objectives is therefore critical for establishing clear links between training programs, objectives, tasks and missions/goals, demonstrating the value of various training programs and aligning training with project goals.

Chapter 4: Generate Reports

One of ADVISOR's key benefits is the ease and speed in which various types of reports can be generated, for projects, missions and jobs. Several reports are discussed below.

4.1 Master Task List Report

Generates a detailed breakdown of each Mission including Segments, Sub Segments, and Functions as well as Tasks, Sub Tasks, Steps and Sub Steps along with Standards, Conditions and who performs each for the Tasks. To generate the Master Task Report:

Step 1: Click on the **Master Task List Report** node under the **Project Reports** folder.

Step 2: You may export the report to Excel, by clicking the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window.

Master Task List Report

Project:	Project Management Office
Prepared by:	Administrator
Date:	07 July 2020 04:01 PM

Mission Analysis	Reference Code	Project Tasks	Sub Tasks	Standards	Conditions	Triggering Action	Task Classification	Task Level of Proficiency	Personnel Safety	Jobs: Project Manager	Jobs: Online Manager
Capture 80% of the widget Market Share											
	Lead-02-001	Set Goals		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Individual	Skilled	No	x	x
	Lead-02-002	Set Course of Action		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Individual	Skilled	No	x	x
	Lead-02-001-001		Prioritize Actions	IAW applicable publications & safety standards	In office environment		Individual	Skilled		x	x
	Lead-02-001-002		Direct Staff	IAW applicable publications & safety standards	In office environment		Individual	Skilled		x	x
	Lead-02-001-003		Monitor Personnel & Resources	IAW applicable publications & safety standards	In office environment		Individual	Skilled		x	x
	Lead-02-003	Resolve Conflict		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Individual	Skilled	No	x	
	Lead-02-004	Perform Market Analysis		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Individual	Skilled	No	x	
	Lead-02-005	Analyze Target Markets Needs		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Individual	Skilled	No	x	
	Lead-02-006	Position Product Effectively		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Individual	Skilled	No	x	x
	Lead-02-007	Evaluate Competitors Actions		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Individual	Skilled	No	x	
Lower Employee Turnover to 5% Annually											
	Lead-03-003	Set Targets		Clear, concise and easily communicated objectives that lead to desired outcomes.	In office environment	Annual Job Reports	Individual	Skilled	No		x
	Lead-03-003-001		Forecast Personnel & Resource Requirements	Clear, concise and easily communicated objectives that lead to desired outcomes.	In office environment		Individual	Skilled	No		x
	Lead-03-003-002		Create Action Plan	Clear, concise and easily communicated objectives that lead to desired outcomes.	In office environment		Individual	Skilled	No		x
	Lead-03-003-003		Evaluate Results	Clear, concise and easily communicated objectives that lead to desired outcomes.	In office environment		Individual	Skilled	No		x

4.2 Master Training Task List Report

Generates a detailed breakdown of each Mission including Segments, Sub Segments, and Functions as well as Tasks, Sub Tasks, Steps and Sub Steps along with Standards, Conditions, Task Difficulty, Importance and Frequency, Training Requirement and other attributes. To generate the Master Training Task List Report:

Step 1: Click on the **Master Training Task List Report** node under the **Project Reports** folder.

Step 2: You may export the report to Excel, by clicking the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window.

Master Training Task List Report

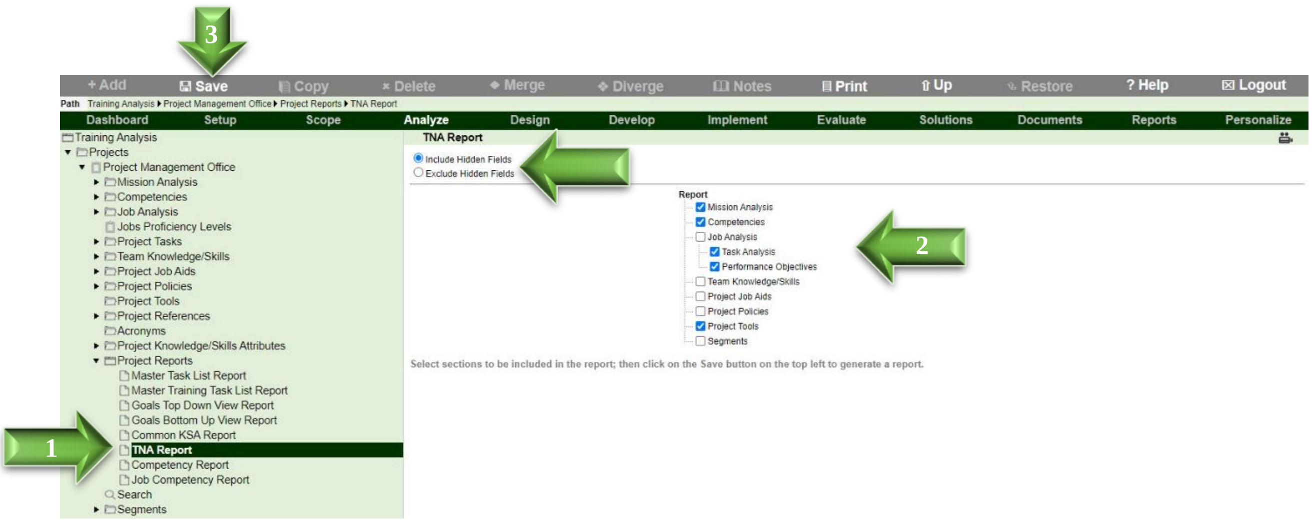
Project:	Project Management Office
Prepared by:	Administrator
Date:	07 July 2020 04:17 PM

Mission Analysis	Reference Code	Project Tasks	Sub Tasks	Standards	Conditions	Triggering Action	Task Difficulty	Task Importance	Task Frequency	Training Level	Task Requires Immediate Action	% of Individuals Performing Task	Time Spent Performing Task	Task Classification	Task Level of Proficiency	Personnel Safety	Jobs: Project Manager	Jobs: Online Manager
Capture 80% of the widget Market Share																		
	Lead-02-001	Set Goals		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Medium	High	High	Level 3	Yes	Medium to High	Medium to High	Individual	Skilled	No	x	x
	Lead-02-002	Set Course of Action		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Medium	High	Low	Level 1	Somewhat	Medium	Low to Medium	Individual	Skilled	No	x	x
	Lead-02-001-001		Prioritize Actions	IAW applicable publications & safety standards	In office environment	Quarterly Reports	Medium	Medium	Medium	Level 2				Individual	Skilled	No	x	x
	Lead-02-001-002		Direct Staff	IAW applicable publications & safety standards	In office environment	Quarterly Reports	High	Medium	Low	Level 1				Individual	Skilled	Not applicable	x	x
	Lead-02-001-003		Monitor Personnel & Resources	IAW applicable publications & safety standards	In office environment	Quarterly Reports	High	High	Low	Level 1				Individual	Skilled	Yes	x	x
	Lead-02-003	Resolve Conflict		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Low	Medium	Low	Level 3	No	Medium to High	High	Individual	Skilled	No	x	
	Lead-02-004	Perform Market Analysis		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Medium	High	Low	Level 3	Somewhat	Low to Medium	Medium to High	Individual	Skilled	No	x	
	Lead-02-005	Analyze Target Markets Needs		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Low	Low	Medium	Level 5	Yes	Medium	High	Individual	Skilled	No	x	
	Lead-02-006	Position Product Effectively		IAW applicable publications & safety standards	In office environment	Quarterly Reports	High	Medium	Low	Level 1	Yes	High	Low	Individual	Skilled	No	x	x
	Lead-02-007	Evaluate Competitors Actions		IAW applicable publications & safety standards	In office environment	Quarterly Reports	Low	Medium	Medium	Level 3	Yes	Low to Medium	Low to Medium	Individual	Skilled	No	x	
Lower Employee Turnover to 5% Annually																		
	Lead-03-003	Set Targets		Clear, concise and easily communicated objectives that lead to desired outcomes.	In office environment	Annual Job Reports	Medium	High	Medium	Level 2	No	Medium to High	Medium	Individual	Skilled	No		x
	Lead-03-003-001		Forecast Personnel & Resource Requirements	Clear, concise and easily communicated objectives that lead to desired outcomes.	In office environment		High	Medium	Medium	Level 2				Individual	Skilled	No		x

4.3 Training Needs Analysis Report

To generate a comprehensive report of missions/goals, tasks performed by each job, as well as attributes.

Step 1: Click on the TNA Report node under the Projects Reports folder.
Step 2: Select items to be included by placing a checkmarks next to the desired sections.
Step 3: Click [**Save**].



<u>Notes:</u>

- If Exclude Hidden Fields is selected, all hidden fields will not be included in the report.
- 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. You may print or save the report using the corresponding functions in your Browser. To return to ADVISOR, close the Report window.

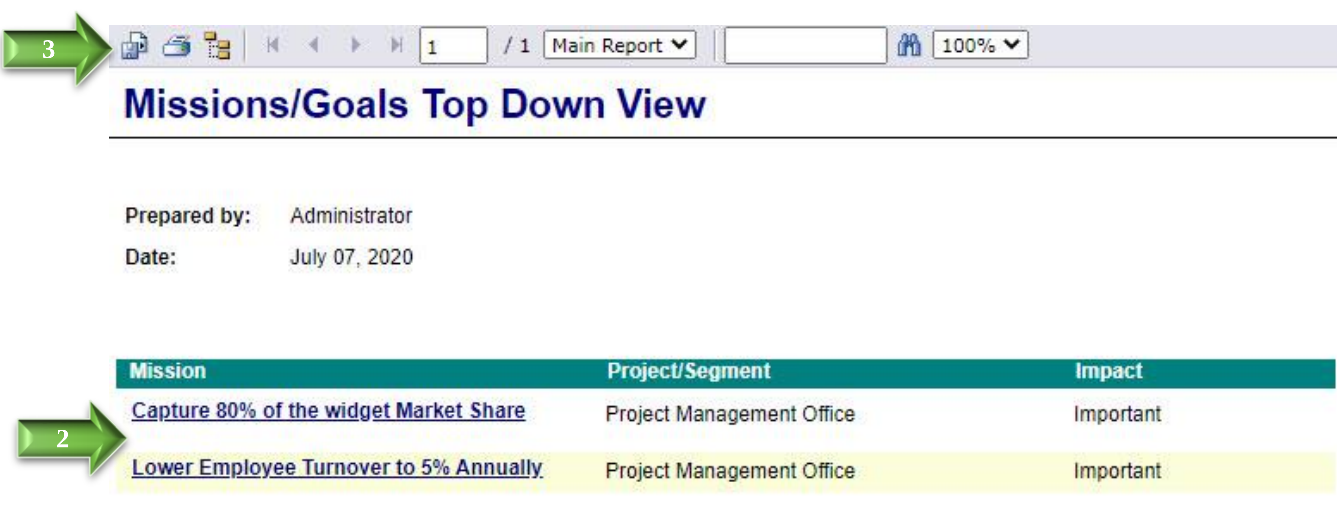
4.4 Goals Top Down View & Goals Bottom Up View Reports

Goals Top Down and Goals Bottom Up Reports generate a concise view of the organization's (project's) missions and goals, as well as how the missions/goals of underlying divisions (segments) support the organization (project) in achieving its missions and goals. In other words, the hierarchy of the organization (project) and its divisions (segments) is displayed in a top down view or bottom up view in order to demonstrate how the organization's (project's) missions and goals are supported. To generate a top down view of which tasks support a specific mission and goal, and who is performing the Tasks:

Step 1: Click on project [**Goals Top Down View Report**] under the **Project Reports** folder.

Step 2: Since the report is in html format, you can click (drill down) on each mission/goal to find out the Tasks performed by various jobs (positions) in support of each mission/goal.

Step 3: You may print and/or save the report using the corresponding export and print icons. To return to ADVISOR, close the Report window.



4.5 Training Requirements Analysis Report

Generates the training requirements for each Job, including the Knowledge, Skills and Attitudes needed by each Performance and Enabling Objective, their classification, as well as Entry and Desired Competency Levels and Gaps. To generate the Training Analysis Report:

Step 1: Click on **Training Requirements Analysis Report** under the **Job Reports** folder.

Step 2: You may export the report to Excel by clicking on the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window.

Training Requirements Analysis Report

Job Profile:	Project Manager
Prepared by:	Administrator
Date:	08 July 2020 04:30 PM

Performance Objective	Enabling Objective	Objective Reference Code	Knowledge/Skills	Knowledge/Skills Reference Code	Learning Outcome	Classification	Entry Level	Desired Level	Gap
Manage relations with personnel, suppliers and customers		PM 001	Assess best venue for motivating employees	A11	Knowledge	Procedure	Basic	Skilled	2
	Assign tasks to personnel		Prioritize Tasks	KSA 421	Knowledge	Fact	Basic	Skilled	2
			Calculate Personnel Utilization	KSA 119	Knowledge	Fact	Basic	Skilled	2
	Evaluate suppliers needs		Categorize Suppliers	KSA 333	Knowledge	Fact	Basic	Skilled	2
			Draft Supply Plan	KSA 335	Knowledge	Fact	Basic	Skilled	2
			Forecast Lead Time	KSA 334	Knowledge	Fact	Semi-Skilled	Skilled	1
	Evaluate customers needs		Prioritize Customer Needs		Knowledge	Fact	Basic	Skilled	2
			Identify Customer Needs		Knowledge	Fact	Semi-Skilled	Skilled	1
Prepare a budget		PM 002							
	Estimate costs		Estimate Facilities Costs	KSA 604	Knowledge	Fact	Basic	Skilled	2
			Estimate Development Effort	KSA 088	Knowledge	Fact	Basic	Skilled	2
			Estimate Personnel Costs	KSA 555	Knowledge	Fact	Semi-Skilled	Skilled	1
	Perform risk analysis		Prioritize Risks	KSA 809	Knowledge	Fact	Basic	Skilled	2
			Analyze Risks	KSA 808	Knowledge	Fact	Semi-Skilled	Skilled	1
	Manage risk and issues		Contingency Plan	KSA 707	Knowledge	Fact	Semi-Skilled	Skilled	1
			Mitigate High Risks	KSA 706	Knowledge	Fact	Semi-Skilled	Skilled	1
Schedule project timeline		PM 003							
	Estimate time to perform tasks		Calculate Average Work Productivity	KSA 676	Knowledge	Fact	Basic	Skilled	2
			Forecast Task Effort	KSA 655	Knowledge	Fact	Basic	Skilled	2
	Create charts and schedules		Forecast Schedules	KSA 404	Knowledge	Fact	Semi-Skilled	Skilled	1
			Estimate Benefits and ROI	KSA 018	Knowledge	Fact	Semi-Skilled	Skilled	1
			Generate Cost Charts	KSA 405	Knowledge	Fact	Basic	Skilled	2

Note:

- Training Requirements (highlighted in green) are identified when the Desired Knowledge/Skill/ Attitude Level exceeds Current Knowledge/Skill/Attitude Level.

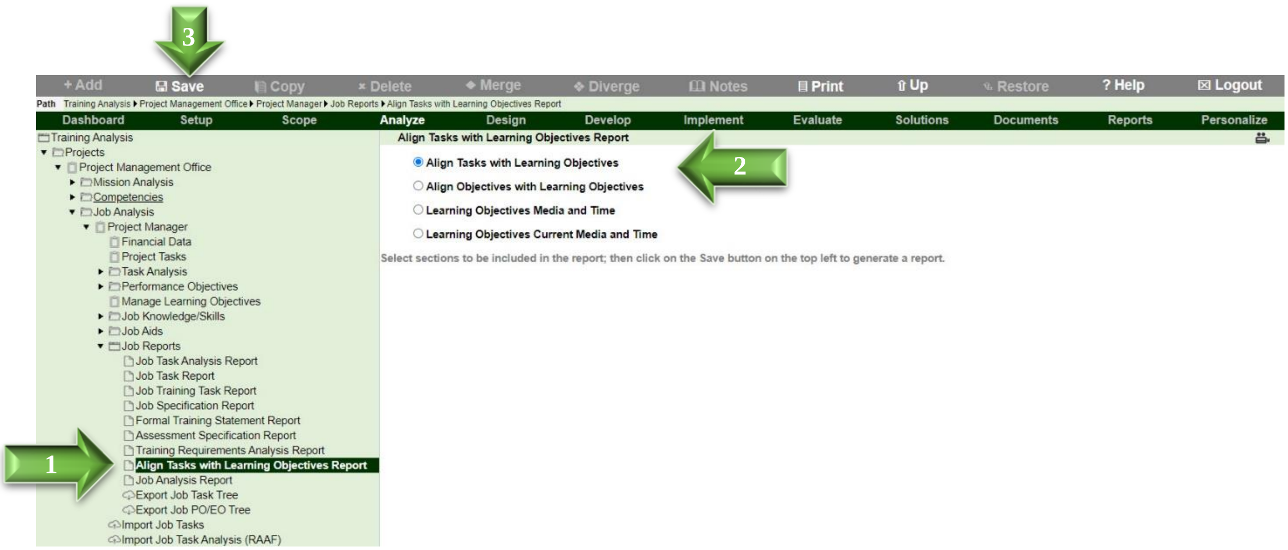
4.6 Align Tasks with Learning Objectives Reports

To generate audit report and validate that all requirements have been adequately addressed. In other words, how and where the requirements of each Task or Performance Objective are being addressed. The reports may also be used to find out how teaching points have been derived. To generate:

Step 1: Click on **Align Tasks with Training Report** node under the **Job Reports** folder.

Step 2: Select which audit report you wish to generate, for example the Align Tasks with Learning Objectives.

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



Note:

- The results are presented in a Tabular format.

Step 4: You may export the report to Excel, by clicking the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window.

Generate Excel

Align Tasks with Learning Objectives Report

Job Profile:	Online Manager
Prepared by:	Administrator
Date:	10 July 2020 11:52 AM

Align Tasks with Learning Objectives

Task	Sub Task	Training Requirement	Performance/Enabling Objective	Training Allocation	Knowledge/Skills	Gap	Learning Objectives	Lesson	Courses
Schedule project timeline		Over Train	Schedule project timeline	Formal Training					
	Estimate time to perform tasks	Train	Estimate time to perform tasks	Formal Training	Forecast Task Effort	Yes	Forecast Task Effort	Forecasting	Online Management
					Forecast Task Effort	Yes	Forecast Task Effort	Personnel & Resources Utilization	Sales Basics
					Calculate Average Work Productivity	Yes	Calculate Average Work Productivity	Forecasting	Online Management
					Calculate Average Work Productivity	Yes	Calculate Average Work Productivity	Personnel & Resources Utilization	Sales Basics
	Create charts and schedules	Train	Create charts and schedules	Formal Training	Forecast Schedules	Yes	Forecast Schedules	Forecasting	Online Management
					Forecast Schedules	Yes	Forecast Schedules	Personnel & Resources Utilization	Sales Basics
					Generate Cost Charts	Yes	Generate Cost Charts	Forecasting	Online Management
					Generate Cost Charts	Yes	Generate Cost Charts	Cost Analysis	Sales Basics
					Estimate Benefits and ROI	Yes	Estimate Benefits and ROI	Forecasting	Online Management
					Estimate Benefits and ROI	Yes	Estimate Benefits and ROI	Cost Analysis	Sales Basics
	Plan activities and sequence	Train	Plan activities and sequence	Formal Training	Prioritize Activities	Yes	Prioritize Activities	Scheduling	Online Management
					Prioritize Activities	Yes	Prioritize Activities	Personnel & Resources Utilization	Sales Basics
					Schedule Activities	Yes	Schedule Activities	Scheduling	Online Management
					Schedule Activities	Yes	Schedule Activities	Personnel & Resources Utilization	Sales Basics
Perform Market Analysis		Over Train	Perform Market Analysis	Formal Training					
	Identify Market Leaders	Train	Identify Market Leaders	Formal Training	Revenue Share	Yes	Revenue Share	Forecasting	Online Management
					Revenue Share	Yes	Revenue Share	Cost Analysis	Sales Basics
					Market Share	Yes	Market Share	Forecasting	Online Management
					Market Share	Yes	Market Share	Cost Analysis	Sales Basics
					Trends and Forecasts	Yes	Trends and Forecasts	Forecasting	Online Management
	Identify Barriers to Entry	Train	Identify Barriers to Entry	Formal Training	Competitor Analysis	Yes	Competitor Analysis	Forecasting	Online Management
					Environment	Yes	Environment	Forecasting	Online Management
					Market Saturation Level	Yes	Market Saturation Level	Needs Assessment	Online Management

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 video icon.

Enjoy!