



## System/Competency 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.

<b>Needs Assessment</b>	<b>Assess:</b> To find out <i>“the cause of the problem and potential solutions”</i> . 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].
<b>Training Analysis</b>	<b>Analysis:</b> To find out <i>“who needs to be trained, on what and why”</i> . 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].
<b>Training Design</b>	<b>Design:</b> To find out <i>“what is the most effective and economical way to deliver training”</i> . 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].
<b>Fidelity Analysis</b>	<b>Develop:</b> To find out the <i>“fidelity requirements of training devices”</i> . 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.
<b>Resource Management</b>	<b>Implementation:</b> To find out <i>“how much money and resources are needed”</i> . 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].
<b>Project Management</b>	<b>Implementation:</b> To find out <i>“how training should be implemented”</i> . 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.

## TABLE OF CONTENTS

<b>1.</b>	<b>Setup Projects</b> .....	<b>1</b>
1.1	Introduction .....	1
1.2	Setup New Projects .....	1
1.3	Configure Projects.....	3
1.4	Setup Project Segments .....	5
<b>2.</b>	<b>Setup Systems/Competencies</b> .....	<b>7</b>
2.1	Overview .....	7
2.2	Setup System/Competency Tasks .....	10
2.3	Identify Knowledge, Skills and Attitudes (KSAs).....	11
2.4	Define Job Aids, Policies and Tools .....	12
	Job Aids .....	12
	Policies/Procedures .....	13
	Tools .....	14
2.5	Define Performance and Enabling Objectives .....	15
	Auto Generate Performance Objectives .....	15
	Create New Performance Objectives .....	16
2.6	Uncover Knowledge and Skills Gaps .....	17
	Define POs/EOs Knowledge/Skills .....	17
	Determine Knowledge/Skills Gaps .....	18
	Define Learning Objectives .....	19
<b>3.</b>	<b>Setup Jobs</b> .....	<b>20</b>
3.1	Setup Jobs .....	20
3.2	Assign Competencies to Jobs .....	21
<b>4.</b>	<b>Generate Reports</b> .....	<b>22</b>
4.1	Tasks Report .....	22
4.2	Performance Objectives Report .....	24
4.3	Training Requirements Analysis Report .....	25
4.4	Align Tasks with Learning Objectives Report .....	26
4.5	System/Competency Analysis Report .....	28
4.6	Systems/Competency Report .....	29
4.7	Job System/Competency Report .....	30




## 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 System/Competency Analysis, Job Analysis and Task Analysis to identify training requirements. Separate Step-by-Step Guides are available for conducting Mission Analysis and Job 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**].

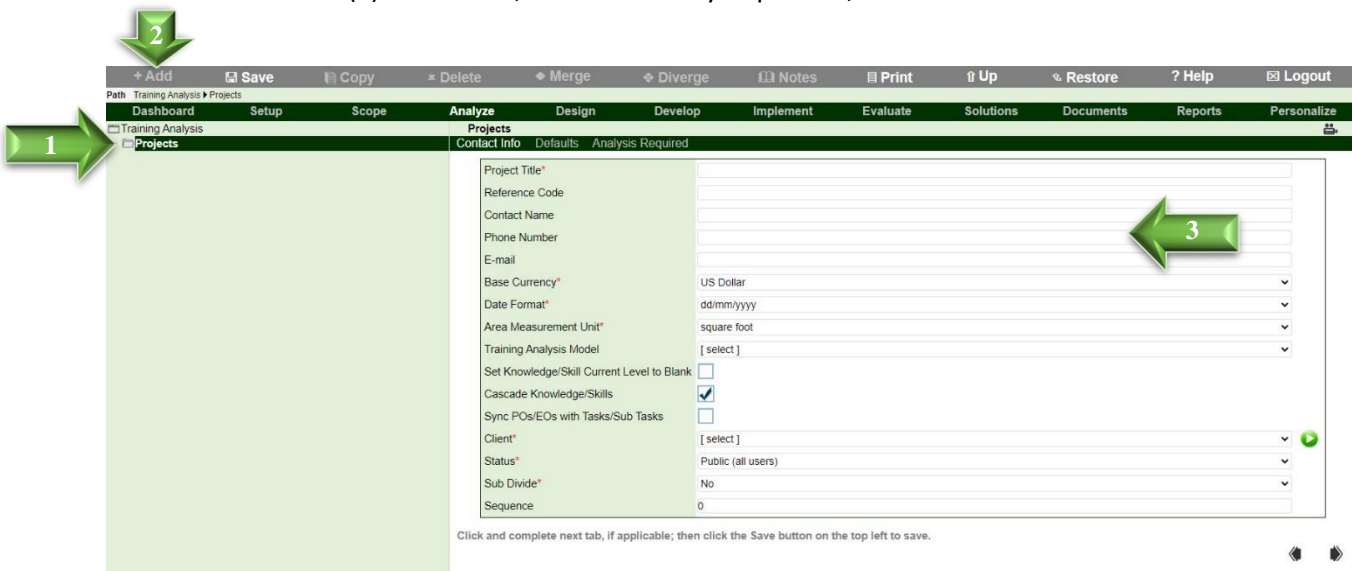
### 1.2 Setup New Projects

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.



The screenshot shows the ADVISOR software interface. The top toolbar includes buttons for Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Up, Restore, Help, and Logout. The main menu includes Dashboard, Setup, Scope, Analyze, Design, Develop, Implement, Evaluate, Solutions, Documents, Reports, and Personalize. The left sidebar shows the 'Projects' folder selected. The main content area displays the 'Project' form with fields for Project Title\*, Reference Code, Contact Name, Phone Number, E-mail, Base Currency\*, Date Format\*, Area Measurement Unit\*, Training Analysis Model, Set Knowledge/Skill Current Level to Blank, Cascade Knowledge/Skills, Sync POs/EOs with Tasks/Sub Tasks, Client\*, Status\*, Sub Divide\*, and Sequence. A green arrow labeled '1' points to the 'Projects' folder in the sidebar. A green arrow labeled '2' points to the 'Add' button in the toolbar. A green arrow labeled '3' points to the 'Project Title' field in the form.

Click and complete next tab, if applicable; then click the Save button on the top left to save.

**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 the corresponding values in new projects.



The screenshot shows the software interface with the following elements:

- Toolbar:** + Add, Save, Copy, Delete, Diverge, Notes, Print, Up, Restore, Help, Logout.
- Navigation:** Dashboard, Setup, Scope, Analyze, Design, Develop, Implement, Evaluate, Solutions, Documents, Reports, Personalize.
- Project Settings:** Contact Info, Defaults, Analysis Required.
- Form Fields:**
  - Annual Productive Days: 230
  - Working Hours per Day: 7.5
  - Fringe Benefits Factor [%]: 0 %
- Instructions:** Click and complete next tab, if applicable; then click the Save button on the top left to save.



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

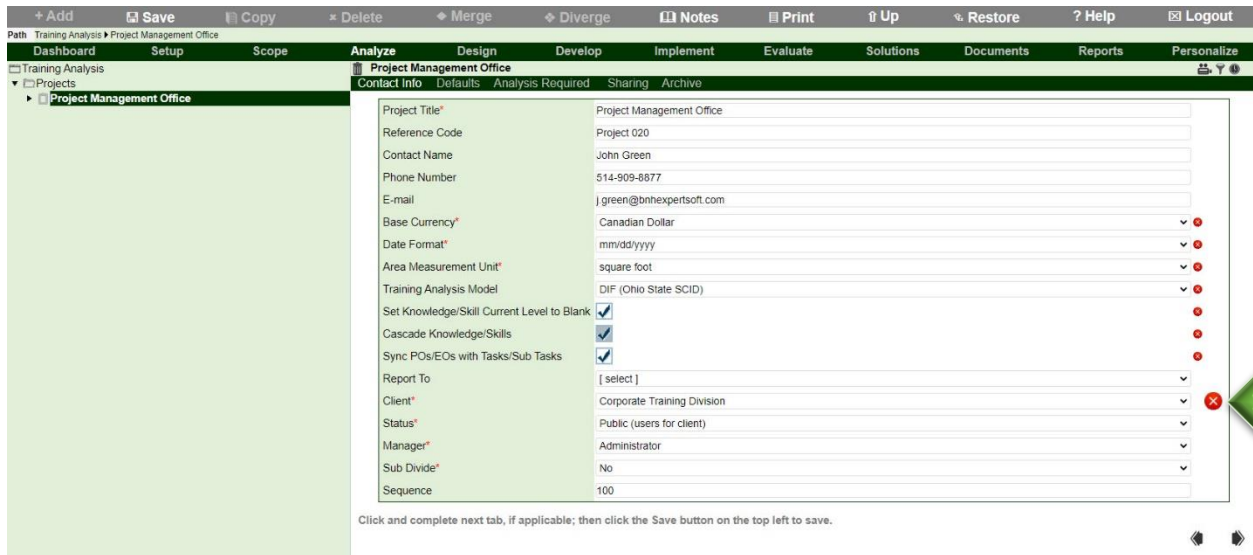
**Notes:**

- 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 .



The screenshot shows the 'Project Management Office' configuration page. The 'Cascade Knowledge/Skills' checkbox is checked, and a red 'X' icon is visible next to the 'Client' dropdown menu. A green arrow labeled '1' points to the 'Cascade Knowledge/Skills' checkbox.

Field	Value
Project Title*	Project Management Office
Reference Code	Project 020
Contact Name	John Green
Phone Number	514-909-8877
E-mail	j.green@bnhexpertsoft.com
Base Currency*	Canadian Dollar
Date Format*	mm/dd/yyyy
Area Measurement Unit*	square foot
Training Analysis Model	DIF (Ohio State SCID)
Set Knowledge/Skill Current Level to Blank	<input checked="" type="checkbox"/>
Cascade Knowledge/Skills	<input checked="" type="checkbox"/>
Sync POs/EOs with Tasks/Sub Tasks	<input checked="" type="checkbox"/>
Report To	[ select ]
Client*	Corporate Training Division
Status*	Public (users for client)
Manager*	Administrator
Sub Divide*	No
Sequence	100

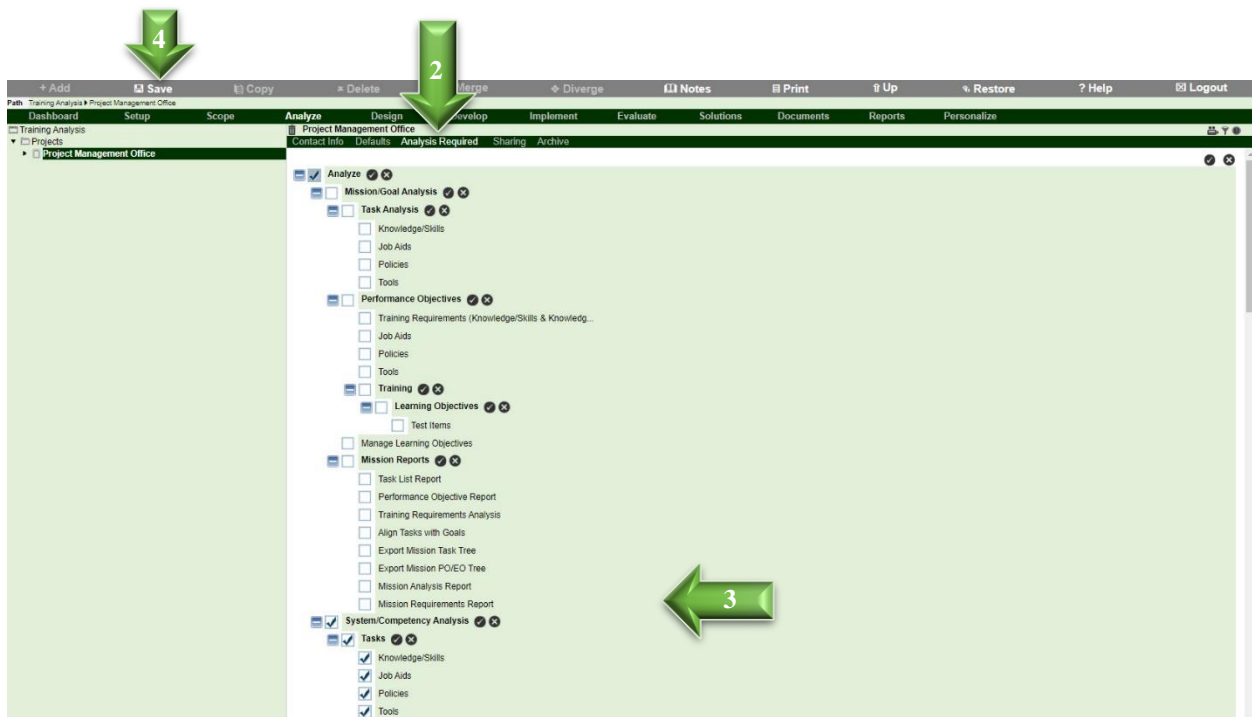
Click and complete next tab, if applicable; then click the Save button on the top left to save.

**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.

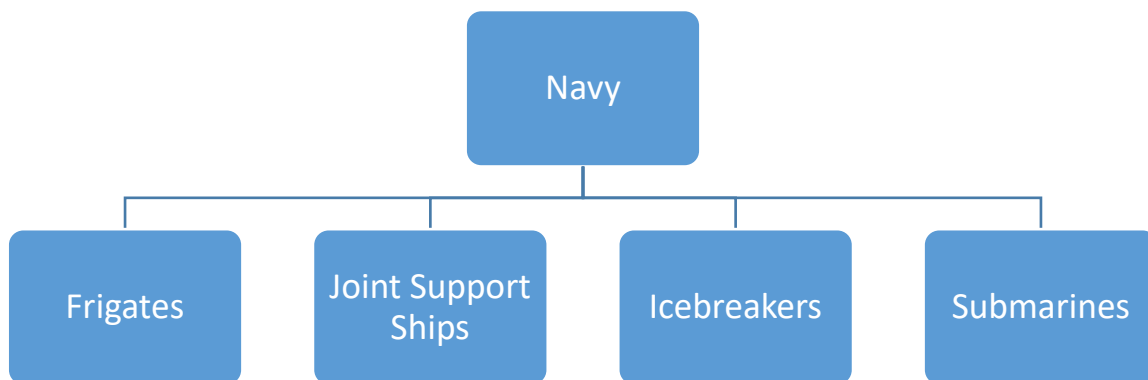
For example, if System Analysis is needed but Mission/Goal Analysis is not required, all checkmarks for Mission/Goal related items should be removed, as shown below. You may, of course, reinstate the Mission Analysis requirement at any time, as the need arises.



**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.



The screenshot shows the software interface with the following elements:

- Navigation Pane (Left):** A tree view showing the hierarchy: Training Analysis > Project Management Office > Segments. The 'Segments' folder is highlighted with a green arrow labeled '1'.
- Toolbar (Top):** Contains buttons for '+ Add', 'Save', 'Copy', 'Delete', 'Merge', 'Diverge', 'Notes', 'Print', 'Up', 'Restore', 'Help', and 'Logout'. The 'Add' button is highlighted with a green arrow labeled '2'.
- Form (Right):** The 'Contact Info' tab is active, showing a form with the following fields:
 

Project Title*	Quality Control Department
Reference Code	Project 021
Contact Name	Red Steel
Phone Number	514-707-7272
E-mail	r.steel@bnhexpertsoft.com
Base Currency*	US Dollar
Date Format*	dd/mm/yyyy
Area Measurement Unit*	square foot
Training Analysis Model	[ select ]
Set Knowledge/Skill Current Level to Blank	<input type="checkbox"/>
Cascade Knowledge/Skills	<input checked="" type="checkbox"/>
Sync POs/EOs with Tasks/Sub Tasks	<input type="checkbox"/>
Status*	Public (all users)
Sub Divide*	No
Sequence	0

 A green arrow labeled '3' points to the 'E-mail' field.

Click and complete next tab, if applicable; then click the Save button on the top left to save.

## Chapter 2: Setup Systems/Competencies

### 2.1 Overview

#### Systems

Job requirements in many cases are directly related to the Systems that individuals operate and maintain. For example, the Tasks, as well as Knowledge/Skill requirements for heavy equipment, truck and forklift drivers and technicians are highly dependent on those vehicles. The same is true for aircraft pilots and technicians, crew onboard ships, and so forth. If multiple jobs operate the same Communication System, for example, we can preserve consistency, drive efficiency and maintain alignment with future system updates by defining the Tasks and Knowledge/Skill requirements once (under the Communication System) and assign them to relevant Jobs. In other words, if Job performance is highly dependent on Systems or Sub Systems, and multiple Jobs operate or maintain the same System or Sub System, then the Systems based analysis approach will yield the best results.



#### Competencies

Competencies are defined as the ability to perform a particular function successfully. Competencies can be core/behavioral (such as, dependability, reliability, team work or problem solving, etc.); or technical – i.e., domain specific. Technical competencies for project managers, may include Time Management, Cost Management, Oral/Written Communication, and so forth. Each technical competency can be further divided into observable/measurable behaviors (indicators of competence), and each Job level will be expected to demonstrate a specific competence level. Since multiple jobs within an organization will most likely require similar competencies, we can preserve consistency, drive efficiency and quickly identify competencies needed to advance to the next level or change jobs by defining the behaviors (equivalent to Tasks with Standards) once (under each competency) and assign them to relevant Jobs.

Since the core requirements for Systems and Competencies are similar, the same ADVISOR functions are used to analyze both by allowing users to change the taxonomy as follows:

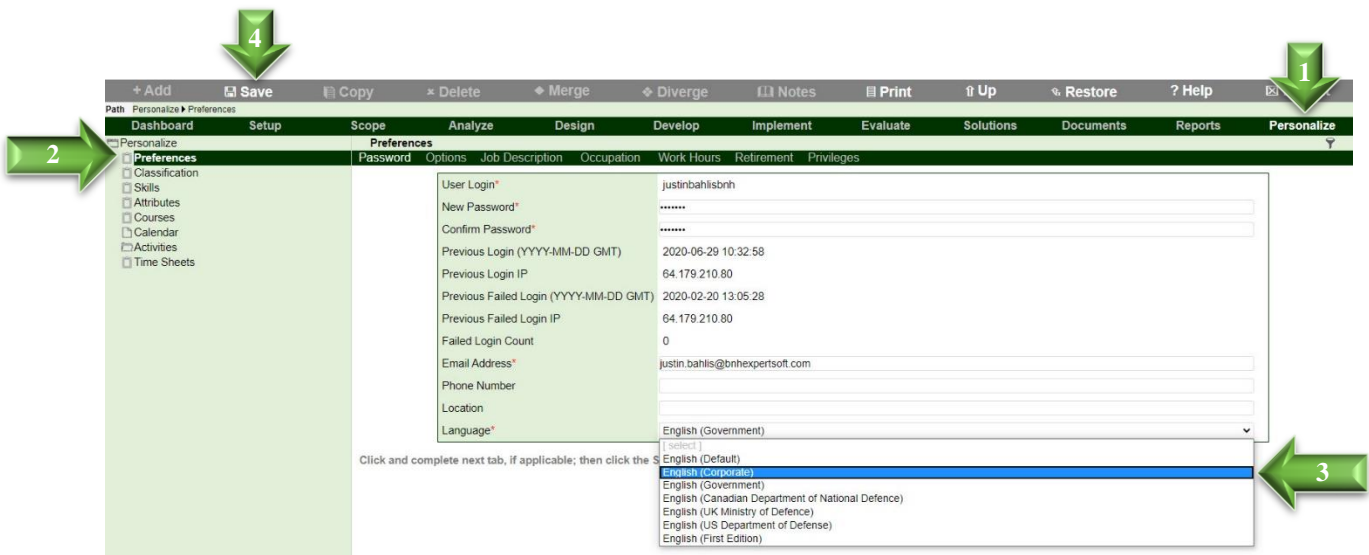
To modify the ADVISOR taxonomy (between System and Competency):

**Step 1:** Click on the Personalize Tab.

**Step 2:** Click  **Preferences** node under the  **Personalize** folder.

**Step 3:** Select English (Corporate) or English (Government) to switch taxonomy to Competency. Other options will default to System.

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



The screenshot shows the ADVISOR software interface. At the top, there is a menu bar with options: + Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Up, Restore, Help, and a search icon. Below the menu bar is a breadcrumb path: Path Personalize > Preferences. The main interface has a navigation pane on the left with a tree view showing: Personalize > Preferences > Classification > Skills > Attributes > Courses > Calendar > Activities > Time Sheets. The main content area is titled 'Preferences' and has sub-tabs: Password, Options, Job Description, Occupation, Work Hours, Retirement, Privileges. The 'Language' field is selected, and a dropdown menu is open, showing the following options: English (Default), English (Corporate), English (Government), English (Canadian Department of National Defence), English (UK Ministry of Defence), English (US Department of Defense), and English (First Edition). The 'English (Corporate)' option is highlighted. A green arrow labeled '1' points to the 'Personalize' tab in the top right. A green arrow labeled '2' points to the 'Preferences' folder in the left navigation pane. A green arrow labeled '3' points to the 'English (Corporate)' option in the dropdown menu. A green arrow labeled '4' points to the 'Save' button in the top menu bar.

**Note:**

- To avoid redundancy, the remainder of this Step by Step guide will illustrate how Competency Analysis is conducted.

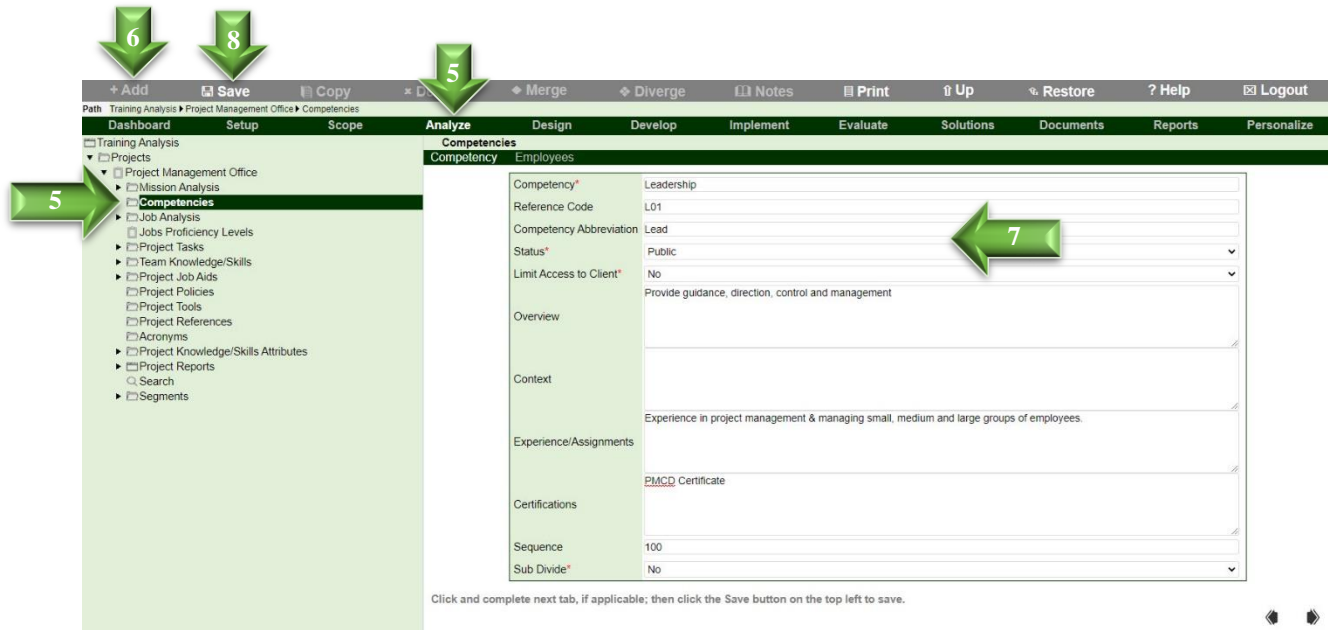
To define a competency:

**Step 5:** Click on the **Competencies** folder, under the **[Analyze]** Tab.

**Step 6:** Click **[Add]**.

**Step 7:** Input the Competency Title, a brief overview as well as other relevant data.

**Step 8:** Click **[Save]** to create the competency.



The screenshot shows the software interface with the following elements:

- Top Toolbar:** + Add, Save, Copy, Merge, Diverge, Notes, Print, Up, Restore, Help, Logout.
- Navigation Tabs:** Dashboard, Setup, Scope, **Analyze**, Design, Develop, Implement, Evaluate, Solutions, Documents, Reports, Personalize.
- Left Navigation Pane:** Training Analysis, Projects, Project Management Office, Mission Analysis, **Competencies**, Job Analysis, Jobs Proficiency Levels, Project Tasks, Team Knowledge/Skills, Project Job Aids, Project Policies, Project Tools, Project References, Acronyms, Project Knowledge/Skills Attributes, Project Reports, Search, Segments.
- Main Content Area:**
  - Competencies Tab:** Leadership
  - Reference Code: L01
  - Competency Abbreviation: Lead
  - Status: Public
  - Limit Access to Client: No
  - Overview: Provide guidance, direction, control and management
  - Context: Experience in project management & managing small, medium and large groups of employees.
  - Experience/Assignments: PMCD Certificate
  - Certifications: (empty)
  - Sequence: 100
  - Sub Divide: No

Click and complete next tab, if applicable; then click the Save button on the top left to save.

### Notes:

- To identify which employees require the Competency, click the **[Employees]** Tab, place checkmarks next to the desired employees and click **[Save]**. The list of employees is comprised of both User Accounts and Project Accounts that are classified as employees of the Client. Once the analysis is complete Training Requirements for Each Employee report can be generated under the **[Reports]** tab.
- Subdivide Competencies: Competencies can be divided into Competency Areas. For example, Leadership Competency can be further divided into the following Areas: Decisiveness, Developing Others, Team Building, etc.

## 2.2 Setup System/Competency Tasks

To create a new task (behavior):

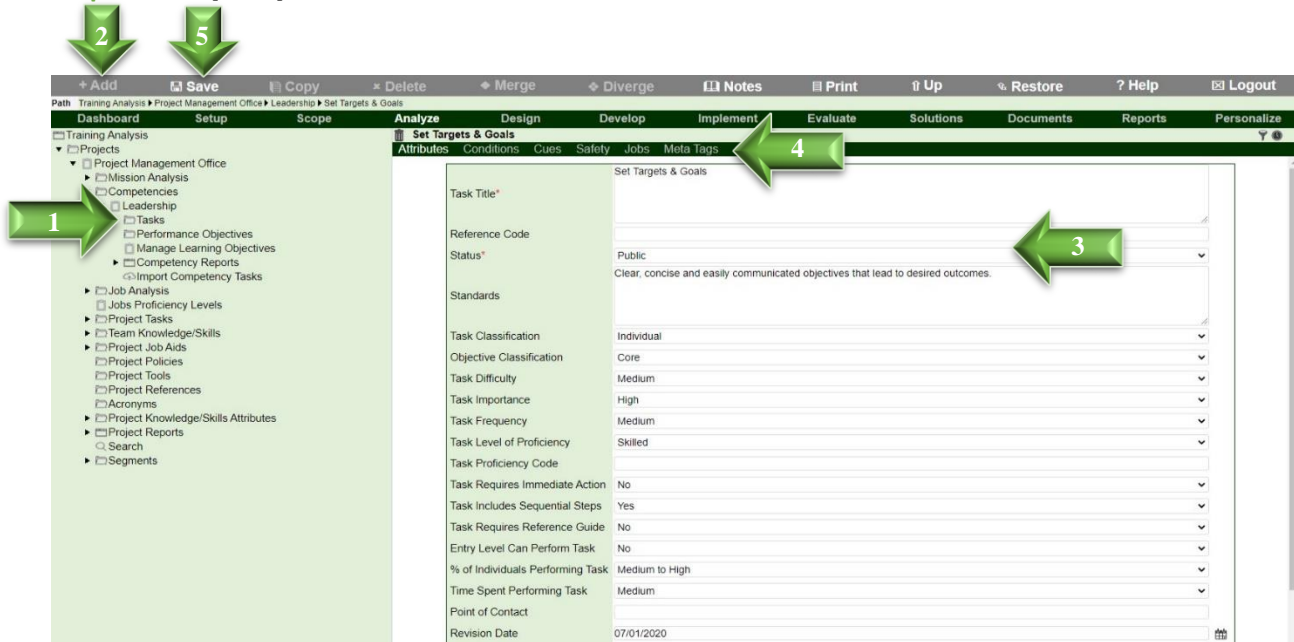
**Step 1:** Click on the **Tasks** folder under the **(competency)** node or **(competency area)** node.

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

**Step 3:** Input the Task Title, Standard, Difficulty, Importance, Frequency, Proficiency 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.



The screenshot shows the 'Set Targets & Goals' form in the software. The form includes fields for Task Title, Reference Code, Status, Standards, Task Classification, Objective Classification, Task Difficulty, Task Importance, Task Frequency, Task Level of Proficiency, Task Proficiency Code, Task Requires Immediate Action, Task Includes Sequential Steps, Task Requires Reference Guide, Entry Level Can Perform Task, % of Individuals Performing Task, Time Spent Performing Task, Point of Contact, and Revision Date. The 'Status' dropdown is set to 'Public'. The 'Conditions' tab is selected.

### 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. Each Task can only be assigned as a single unit (including all Sub Tasks) to a single Competency. In other words, if a Task is divided into Sub Task A and Sub Task B, you cannot assign Sub Task A to Leadership Competency for example, and Sub Task B to General Competency.
- Search. To facilitate the analysis, a **[Search]** tab is presented on the **Tasks** 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.

## 2.3 Identify Knowledge, Skills and Attitudes (KSAs)

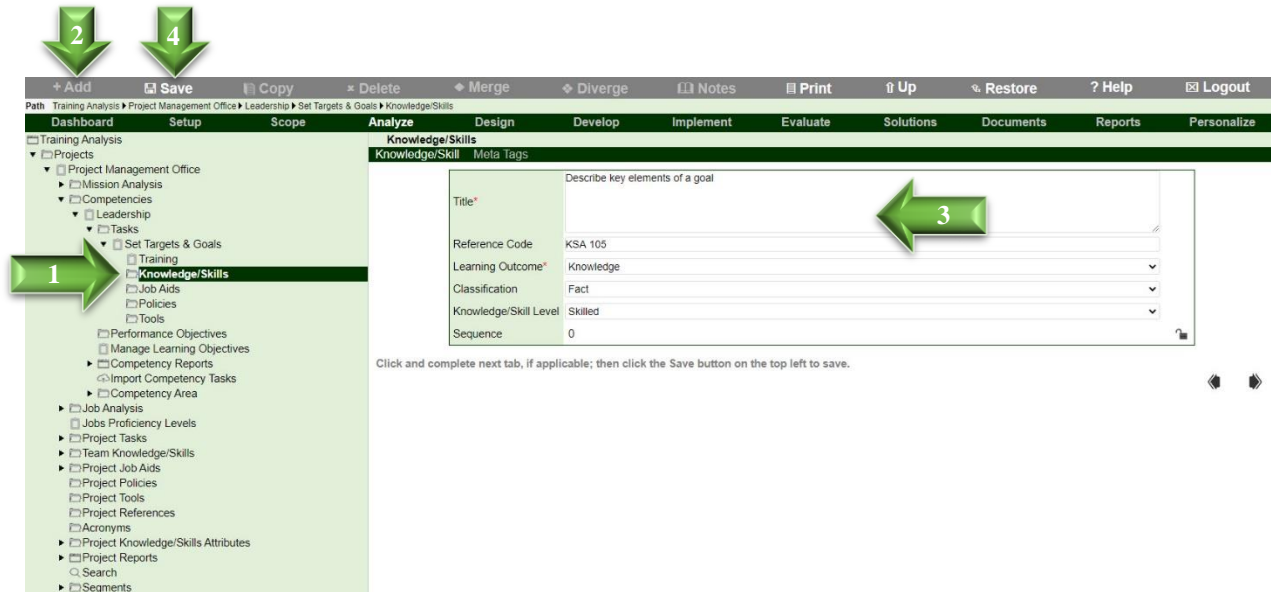
To identify knowledge, skills and attitudes needed to perform the Task to the desired level:

**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.






The screenshot shows the software interface for adding a Knowledge/Skill. The left navigation pane has a tree view with 'Knowledge/Skills' selected, indicated by a green arrow labeled '1'. The top toolbar contains buttons for '+ Add', 'Save', 'Copy', 'Delete', 'Merge', 'Diverge', 'Notes', 'Print', 'Up', 'Restore', 'Help', and 'Logout'. A green arrow labeled '2' points to the '+ Add' button. The main form area is titled 'Knowledge/Skill' and contains the following fields:

Title*	Describe key elements of a goal
Reference Code	KSA 105
Learning Outcome*	Knowledge
Classification	Fact
Knowledge/Skill Level	Skilled
Sequence	0

A green arrow labeled '3' points to the 'Title' field. Below the form, there is a note: 'Click and complete next tab, if applicable; then click the Save button on the top left to save.' A green arrow labeled '4' points to the 'Save' button in the top toolbar.

### 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** folders.
- 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 checkmark next to the required Knowledge/Skills and clicking [Save] to add under the Task.

## 2.4 Define Job Aids, Policies and Tools

### Job Aids

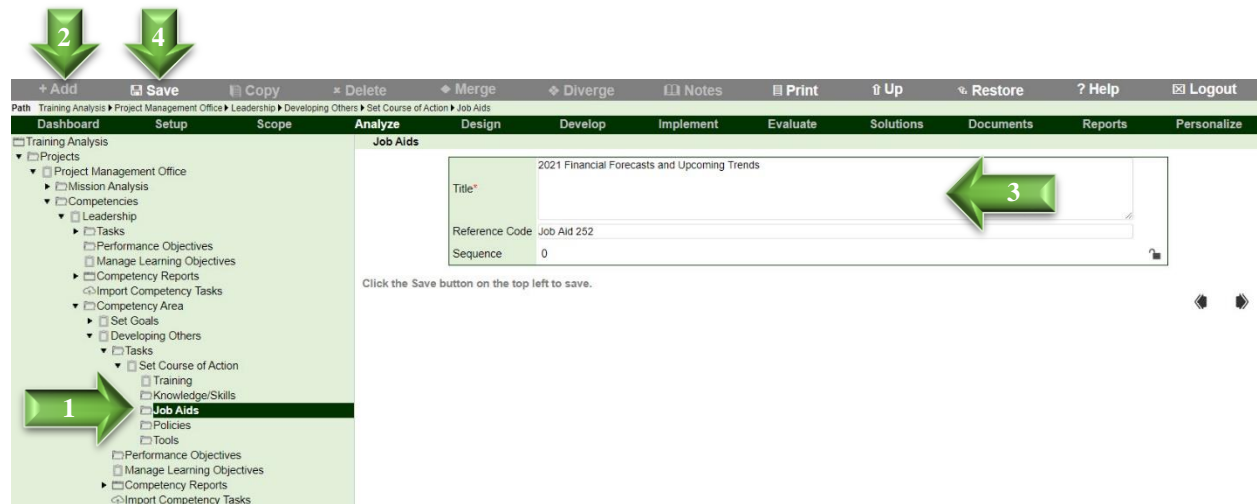
To identify job aids needed to perform Tasks:

**Step 1:** Click on the **Job Aids** folder.

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

**Step 3:** Input the job aid title, description and other required information.

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



The screenshot shows the software interface with the following elements:

- Top Toolbar:** + Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Up, Restore, Help, Logout.
- Navigation Path:** Training Analysis > Project Management Office > Leadership > Developing Others > Set Course of Action > Job Aids
- Navigation Pane (Left):** Training Analysis > Projects > Project Management Office > Mission Analysis > Competencies > Leadership > Tasks > Job Aids (highlighted with arrow 1).
- Main Content Area:** Job Aids form with fields for Title (2021 Financial Forecasts and Upcoming Trends), Reference Code (Job Aid 252), and Sequence (0). A green arrow 3 points to the Title field.
- Buttons:** A green arrow 2 points to the 'Add' button in the top toolbar, and a green arrow 4 points to the 'Save' button in the top toolbar.

### Note:

- Similar to Knowledge/Skills, each time a Job Aid is added, they are automatically compiled under the **Project Job Aids** folder.
- To minimize duplication, in lieu of adding job aids, user may review Job Aids under **Project Job Aids** folder by clicking on the **[Select]** tab under **Job Aids** folder, placing checkmarks next to the required Job Aids and clicking **[Save]** to add under the Task or Performance Objective.

## Policies/Procedures

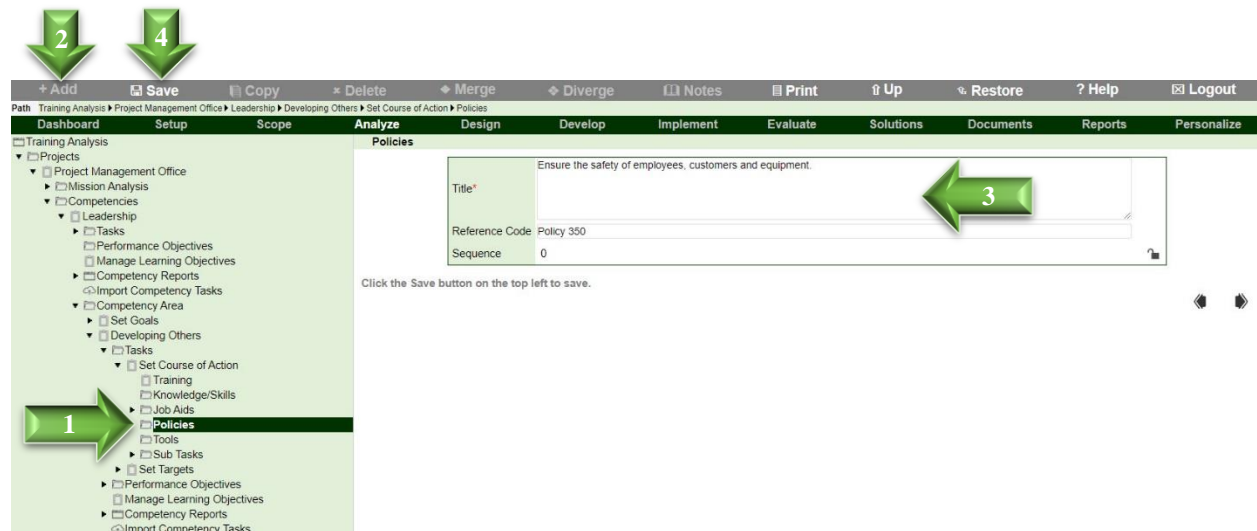
To identify policies and procedures needed to perform Tasks:

**Step 1:** Click on the **Policies** folder.

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

**Step 3:** Input the policy title, description and other required information.

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



The screenshot shows the software interface with a left-hand navigation pane and a main content area. In the navigation pane, the 'Policies' folder is highlighted with a green arrow labeled '1'. In the top toolbar, the '+ Add' button is highlighted with a green arrow labeled '2'. In the main content area, the 'Policies' form is visible, with the 'Title' field containing the text 'Ensure the safety of employees, customers and equipment.' and a green arrow labeled '3' pointing to it. Below the form, there is a 'Reference Code' field with 'Policy 350' and a 'Sequence' field with '0'. A 'Save' button is located at the top left of the form area.

### Note:

- Similarly, when a Policy is added, it is automatically compiled under the **Project Policies** folder.
- To minimize duplication, in lieu of adding policies, user may review Policies under **Project Policies** folder by clicking on the **[Select]** tab under **Policies/Procedures** folder, placing checkmarks next to the required Policies and clicking **[Save]** to add under the Task or Performance Objective.

## Tools

To identify tools needed to perform Tasks:

**Step 1:** Click on the **Tools** folder.

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

**Step 3:** Input the tool title, description and other required information.

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



The screenshot shows the ADVISOR software interface. The left navigation pane has a tree view with 'Tools' highlighted under 'Competencies' > 'Tasks'. A green arrow labeled '1' points to this 'Tools' folder. The top toolbar contains buttons for '+ Add', 'Save', 'Copy', 'Delete', 'Merge', 'Diverge', 'Notes', 'Print', 'Up', 'Restore', 'Help', and 'Logout'. A green arrow labeled '2' points to the '+ Add' button. The main content area shows a form for adding a tool. The 'Title' field contains the text 'ADVISOR: Personnel & Resources Software to forecast financial, personnel, equipment and resource requirements'. A green arrow labeled '3' points to this field. The 'Reference Code' field contains 'Tool 090' and the 'Sequence' field contains '0'. A green arrow labeled '4' points to the 'Save' button in the top toolbar. Below the form, there is a note: 'Click the Save button on the top left to save.'

### Note:

- Similarly, when a Tool is added, it is automatically compiled under the **Project Tools** folder.
- To minimize duplication, in lieu of adding tools, user may review Tools under **Project Tools** folder by clicking on the [**Select**] tab under **Tools** folder, placing checkmarks next to the required Tools and clicking [**Save**] to add under the Task or Performance Objective.

## 2.5 Define Performance and Enabling Objectives

Tasks refer to activities that individuals are expected to perform within a competency. 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.

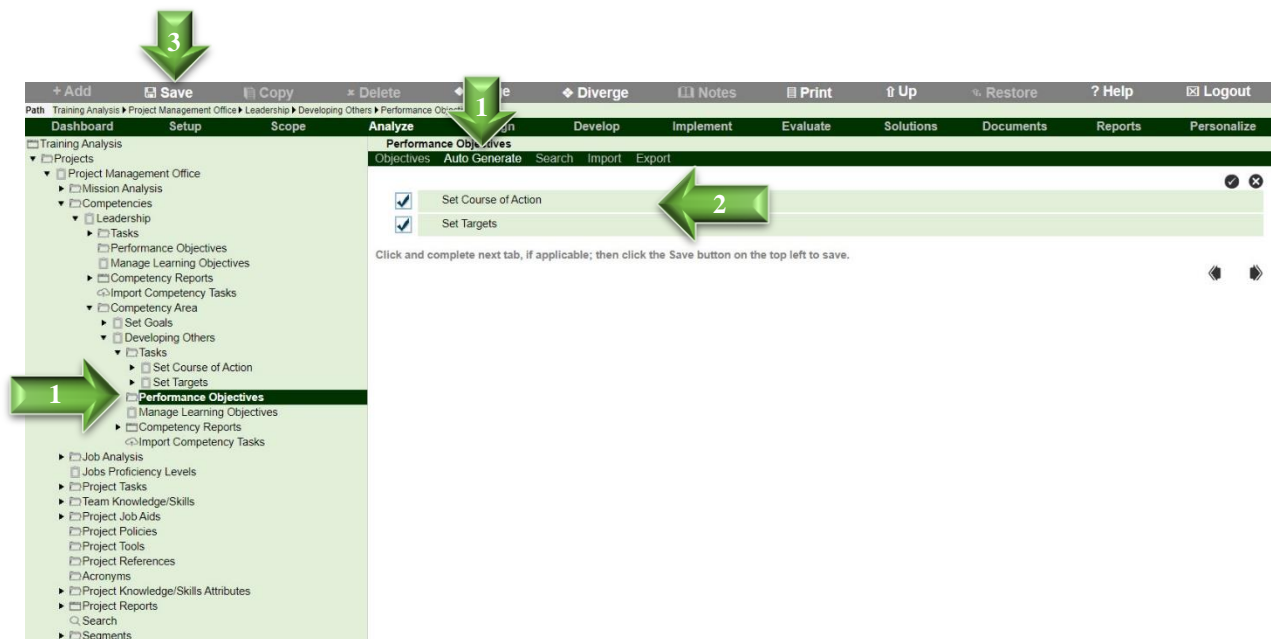
### Auto Generate Performance Objectives

To facilitate the creation of Performance and Enabling Objectives, Competency 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 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, Skills, Job Aids, Policies and tools will also be transposed.



The screenshot shows the software interface with the following elements:

- Top Toolbar:** + Add, Save, Copy, Delete, Diverge, Notes, Print, Up, Restore, Help, Logout.
- Navigation Tabs:** Dashboard, Setup, Scope, Analyze, Performance Objectives, Develop, Implement, Evaluate, Solutions, Documents, Reports, Personalize.
- Left Sidebar:** Training Analysis, Projects, Project Management Office, Mission Analysis, Competencies, Leadership, Tasks, Performance Objectives (highlighted with arrow 1), Manage Learning Objectives, Competency Reports, Import Competency Tasks, Competency Area, Set Goals, Developing Others, Job Analysis, Jobs Proficiency Levels, Project Tasks, Team Knowledge/Skills, Project Job Aids, Project Policies, Project Tools, Project References, Acronyms, Project Knowledge/Skills Attributes, Project Reports, Search, Segments.
- Main Window:** Performance Objectives, Auto Generate, Search, Import, Export. A list of tasks: Set Course of Action (checked), Set Targets (checked). A note below: "Click and complete next tab, if applicable; then click the Save button on the top left to save." (Arrow 2 points to the checkmarks).
- Bottom Left:** A green arrow labeled '3' points to the 'Save' button in the top toolbar.

### Note:

- To preserve data integrity, should the Competency Task attributes change, they 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:

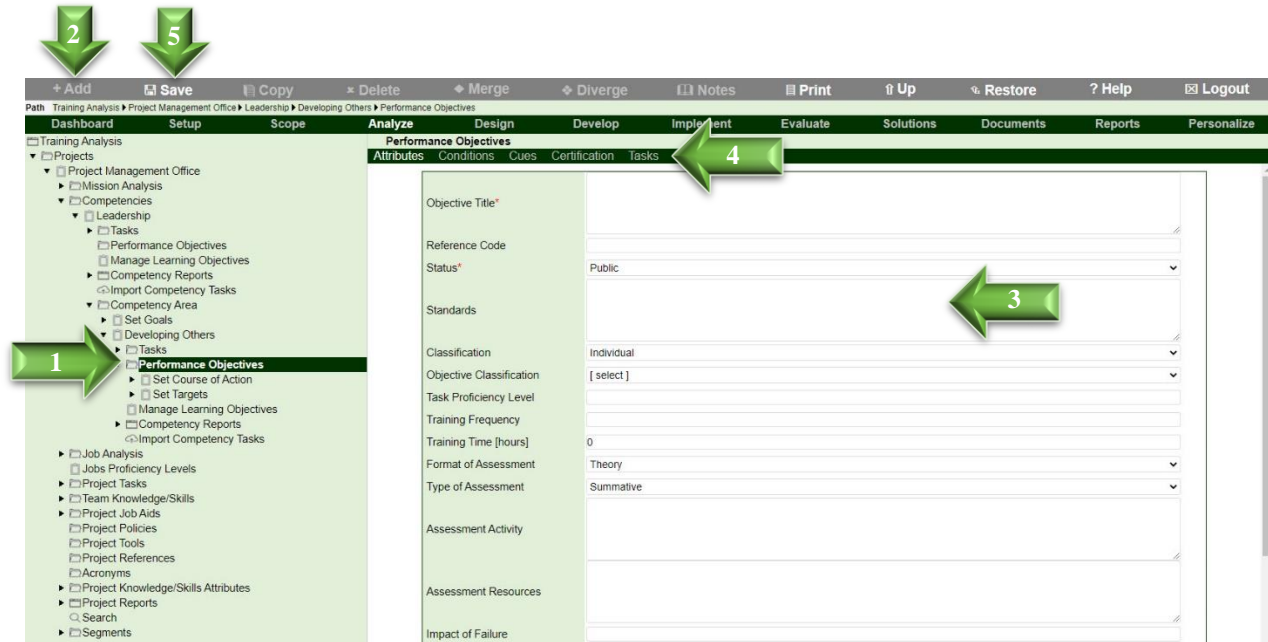
**Step 1:** Click on the  **Performance Objectives** folder under the  **(competency)** node.

**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]** and **[Tasks]** tabs, and complete.

**Step 5:** Click **[Save]**, 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., 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 Competency. In other words, if a Performance Objective is divided into Enabling Objectives A and B, you cannot assign Enabling Objective A to Leadership Competency for example, and Enabling Objective B to General Competency.
- **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.

- **Search.** To facilitate the analysis, a [Search] tab is also 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 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.

## 2.6 Uncover Knowledge and Skills Gaps

### Define POs/EOs Knowledge/Skills

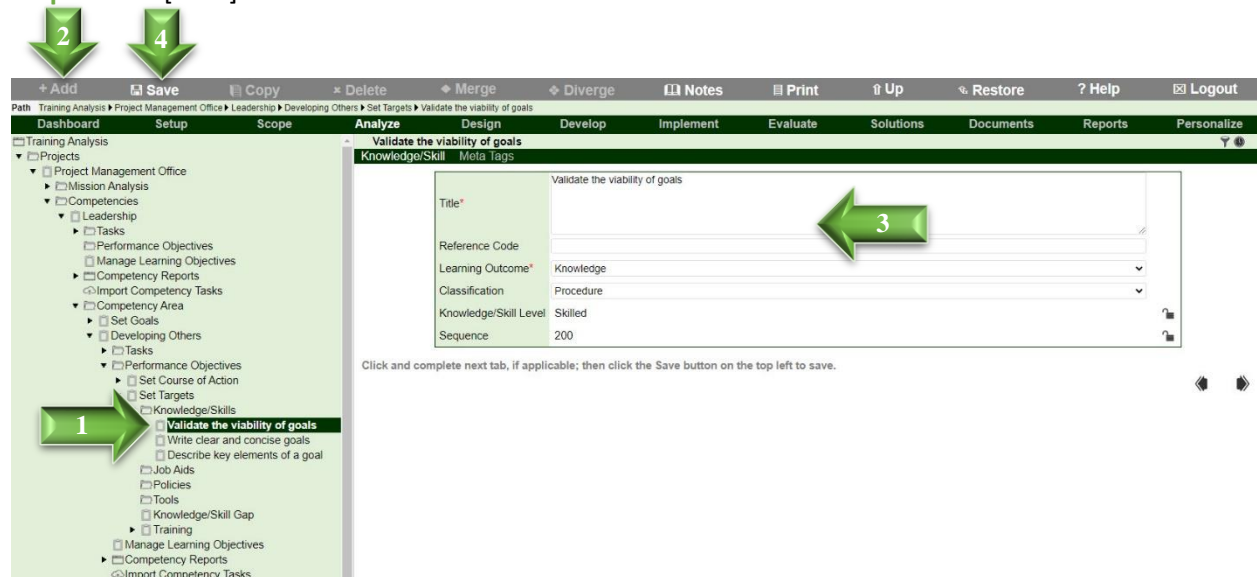
If the Performance Objective was created using the [Auto Generate] tab, then all associated KSAs of the Task will be automatically copied to the **Knowledge/Skills** folder. Otherwise you can define the required knowledge and skills for the performance objective as follows:

**Step 1:** Click on the **Knowledge/Skills** folder.

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

**Step 3:** Input the Knowledge/Skill Title, Learning Outcome, Classification and Knowledge/Skill Level.

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



The screenshot shows the software interface with a navigation tree on the left and a form on the right. The tree has a green arrow labeled '1' pointing to 'Validate the viability of goals'. The form has a green arrow labeled '2' pointing to the 'Add' button and another green arrow labeled '3' pointing to the 'Title' field. The form contains the following fields:

Title*	Validate the viability of goals
Reference Code	
Learning Outcome*	Knowledge
Classification	Procedure
Knowledge/Skill Level	Skilled
Sequence	200


Click and complete next tab, if applicable; then click the Save button on the top left to save.

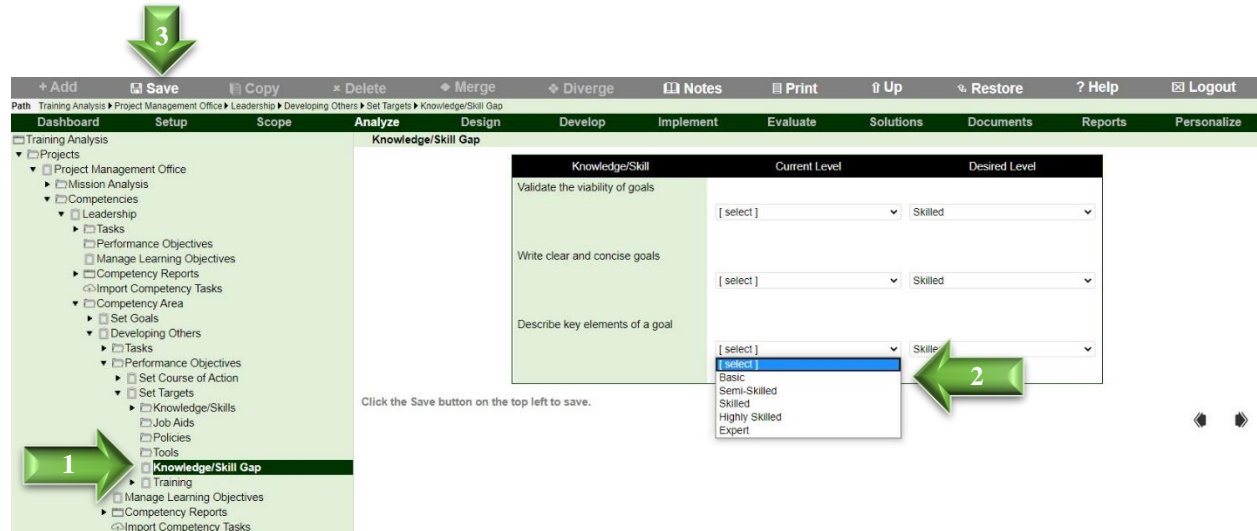
### Note:

- 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/Skill Gaps




To identify knowledge and skill gaps:

- Step 1:** Click on the  **Knowledge/Skills Gap** node.  
**Step 2:** Indicate the current knowledge and skill levels.  
**Step 3:** Click [**Save**].



The screenshot shows the 'Knowledge/Skill Gap' configuration screen. The left sidebar contains a tree view with 'Knowledge/Skill Gap' selected. The main area has a table with columns for 'Knowledge/Skill', 'Current Level', and 'Desired Level'. Three rows are visible, each with a task description and two dropdown menus. The 'Current Level' dropdown for the third row is open, showing a list of skill levels. A 'Save' button is located at the top left of the main content area.

### 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 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

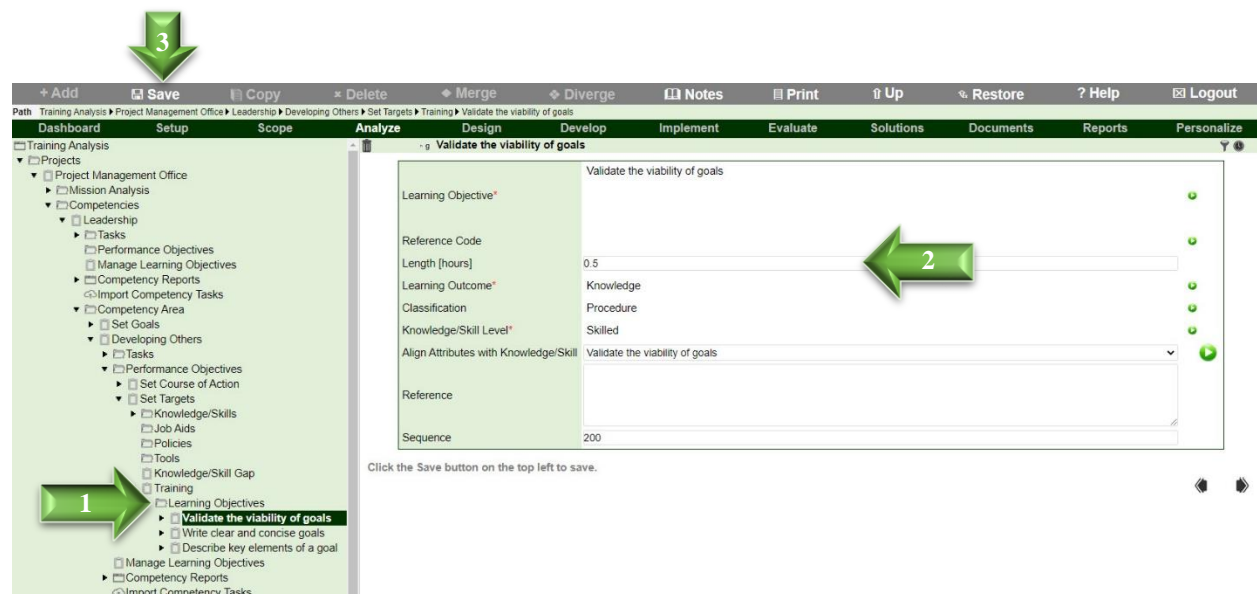
You may create multiple Learning Objectives (Teaching Points) to address a single knowledge/skill gap. The Learning Objectives should specify the conditions under which knowledge and skills should be exhibited, the standard to which it will be performed and reflect the gap between current and desired 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**].



The screenshot shows the software interface with the following elements:

- Navigation Pane (Left):** A tree view showing the hierarchy: Training Analysis > Projects > Project Management Office > Mission Analysis > Competencies > Leadership > Learning Objectives. The 'Validate the viability of goals' folder is highlighted with a green arrow labeled '1'.
- Form (Right):** A form titled 'Validate the viability of goals' with the following fields:
  - Learning Objective\*: Validate the viability of goals
  - Reference Code: [Empty]
  - Length [hours]: 0.5 (highlighted with a green arrow labeled '2')
  - Learning Outcome\*: Knowledge
  - Classification: Procedure
  - Knowledge/Skill Level\*: Skilled
  - Align Attributes with Knowledge/Skill: Validate the viability of goals
  - Reference: [Empty]
  - Sequence: 200
- Buttons (Top):** + Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Up, Restore, Help, Logout.
- Footer:** Click the Save button on the top left to 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 therefore critical for establishing clear links between Training Programs, Objectives, Tasks, Jobs and Competencies; demonstrating the value of various training programs, and aligning training with organizational missions/goals.

## Chapter 3: Setup Jobs

### 3.1 Setup Jobs

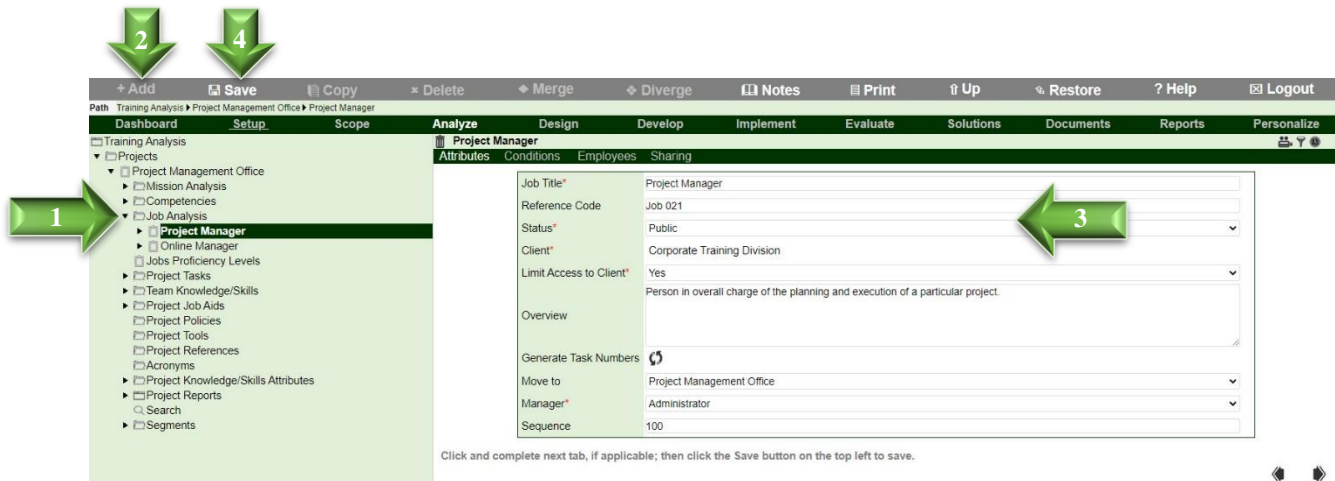
To identify Jobs to be analyzed:

**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.



The screenshot shows the software interface for setting up a job. The left navigation pane has a tree view with 'Project Manager' selected, indicated by a green arrow labeled '1'. The main area shows a form for 'Project Manager' with fields for Job Title, Reference Code, Status, Client, Limit Access to Client, Overview, Generate Task Numbers, Move to, Manager, and Sequence. A green arrow labeled '3' points to the 'Status' dropdown menu. At the top of the form, there are buttons for '+ Add', 'Save', 'Copy', 'Delete', 'Merge', 'Diverge', 'Notes', 'Print', 'Up', 'Restore', 'Help', and 'Logout'. A green arrow labeled '2' points to the '+ Add' button, and another green arrow labeled '4' points to the 'Save' button. Below the form, there is a note: 'Click and complete next tab, if applicable; then click the Save button on the top left to save.'

#### 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 Assign Competencies to Jobs

**Step 1:** Click on the  **Jobs Proficiency Levels** node.

**Step 2:** Select Jobs to be analyzed.

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

The screenshot shows the 'Jobs Proficiency Levels' configuration screen. On the left, a tree view shows the navigation structure, with 'Jobs Proficiency Levels' selected under 'Competencies'. In the main area, 'Project Manager' and 'Online Manager' are checked. The 'Save' button is highlighted in the top toolbar.

Competencies and Competency Areas created under the  **Competencies** folder (Section 2.2) are presented in the 1<sup>st</sup> column and the Jobs in the 1<sup>st</sup> row. To indicate the level of competency required by each Job:

**Step 4:** Click on the desired cell to display a dropdown menu, and select the desired level.

**Step 5:** Once the competency requirements for all Jobs have been defined, click [**Save**].

The screenshot shows the 'Jobs Proficiency Levels' table. The table has columns for 'Systems', 'Project Manager', and 'Online Manager'. The 'Initiative' row is selected, and a dropdown menu is open for the 'Project Manager' cell, showing levels: Basic, Semi-Skilled, Skilled, Highly Skilled, Expert. The 'Save' button is highlighted in the top toolbar.



Systems	Project Manager	Online Manager
<b>Leadership</b>	Skilled	Skilled
Set Goals	Skilled	Semi-Skilled
Developing Others	Highly Skilled	Skilled
<b>General</b>	Skilled	Skilled
Conflict Management	Highly Skilled	Semi-Skilled
Flexibility	Skilled	Semi-Skilled
Initiative	Skilled	[select]

## Chapter 4: Generate Reports

One of ADVISOR's key benefits is the easy and speed in which various types of reports can be generated, for project, systems/competencies and jobs. Several reports are discussed below.

### 4.1 Tasks Report

Generates a concise list of Tasks, Sub Tasks, Steps and Sub Steps for each System/Competency including training requirement and priority, as well as prerequisite Knowledge and Skills. To generate Tasks Report:

**Step 1:** Click on the  **Task List Report** node under the  **Competency 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.

[Generate Excel](#) 

**Tasks Report**

System: Developing Others  
 Prepared by: Administrator  
 Date: 02 July 2020 01:26 PM

Tasks	Sub Tasks	Reference Code	Training Requirement	Training Priority
Set Course of Action	Prioritize Actions		Train	High
	Direct Staff		Train	High
	Monitor Personnel & Resources		Train	High
Set Targets			Train	High
	Forecast Personnel & Resource Requirements		Train	High
	Create Action Plan		Train	High
	Evaluate Results		Train	High

Knowledge/Skills	Learning Outcome	Knowledge/Skill Level
Identify Market Segments	Knowledge	Skilled
Describe key elements of a goal	Knowledge	Skilled
Validate the viability of goals	Knowledge	Skilled
Write clear and concise goals	Knowledge	Skilled
Implement incentive system	Knowledge	Skilled
Measure employees engagement	Knowledge	Skilled
Describe key elements in a core value	Knowledge	Skilled
Communicate importance of core values	Knowledge	Skilled
Validate the viability of goals	Knowledge	Skilled
Write clear and concise goals	Knowledge	Skilled
Implement incentive system	Knowledge	Skilled
Implement safety system	Knowledge	Skilled
Measure employees engagement	Knowledge	Skilled
Measure management engagement	Knowledge	Skilled
Calculate Personnel Utilization	Knowledge	Skilled
Prioritize Tasks	Knowledge	Skilled
Estimate Facilities Costs	Knowledge	Skilled
Estimate Personnel Costs	Knowledge	Skilled
Estimate Development Effort	Knowledge	Skilled
Analyze Risks	Knowledge	Skilled
Prioritize Risks	Knowledge	Skilled
Mitigate High Risks	Knowledge	Skilled
Contingency Plan	Knowledge	Skilled
Estimate Benefits and ROI	Knowledge	Skilled
Describe key elements of a goal	Knowledge	Skilled

## 4.2 Performance Objectives Report

Generates a concise list of Performance and Enabling Objectives for each System/Competency including prerequisite Knowledge and Skills and Training Requirements. To generate Performance Objectives report:

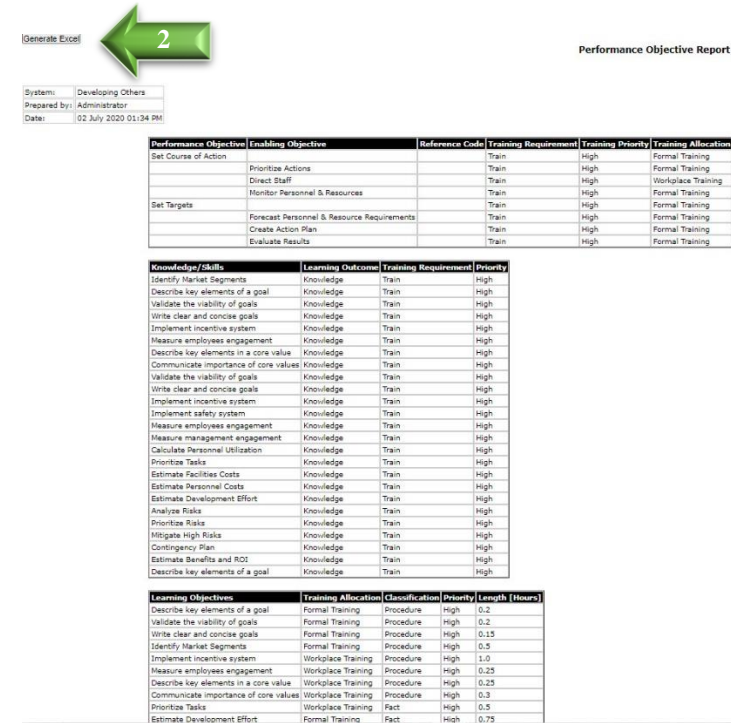
**Step 1:** Click on the  **Performance Objective Report** node under the  **Competency Reports** folder.



The screenshot shows the ADVISOR software interface. The top menu bar includes options like Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Up, Restore, Help, and Logout. Below the menu is a breadcrumb path: Path Training Analysis > Project Management Office > Leadership > Developing Others > Competency Reports > Performance Objectives Report. The main navigation pane is divided into sections: Dashboard, Setup, Scope, Analyze, Design, Develop, Implement, Evaluate, Solutions, Documents, Reports, and Personalize. Under the 'Reports' section, a tree view shows the following structure:

- Projects
  - Project Management Office
    - Mission Analysis
    - Competencies
      - Leadership
        - Tasks
          - Performance Objectives
          - Manage Learning Objectives
        - Competency Reports
        - Import Competency Tasks
      - Competency Area
        - Set Goals
        - Developing Others
          - Tasks
            - Performance Objectives
            - Manage Learning Objectives
        - Competency Reports
          - Tasks Report
          - Performance Objectives Report** (highlighted with a green arrow and '1')
          - Training Requirements Analysis Report
          - Align Tasks with Training Report
        - Competency Tasks Scalars
          - Competency Objectives Scalars
          - Competency Analysis Report
          - Competency Requirements Report
          - Training Plan Report
          - Qualification Plan & Standards Report
        - Import Competency Tasks

**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.



The screenshot shows the 'Performance Objective Report' window. In the top left corner, there is a 'Generate Excel' button, which is highlighted with a green arrow and the number '2'. Below the button, the following information is displayed:

System: Developing Others  
Prepared by: Administrator  
Date: 02 July 2020 01:34 PM

The report contains two tables:

Performance Objective	Enabling Objective	Reference Code	Training Requirement	Training Priority	Training Allocation
Set Course of Action	Prioritize Actions		Train	High	Formal Training
	Direct Staff		Train	High	Formal Training
	Monitor Personnel & Resources		Train	High	Workplace Training
Set Targets	Forecast Personnel & Resource Requirements		Train	High	Formal Training
	Create Action Plan		Train	High	Formal Training
	Evaluate Results		Train	High	Formal Training

Knowledge/Skills	Learning Outcome	Training Requirement	Priority
Identify Market Segments	Knowledge	Train	High
Describe key elements of a goal	Knowledge	Train	High
Validate the viability of goals	Knowledge	Train	High
Write clear and concise goals	Knowledge	Train	High
Implement incentive system	Knowledge	Train	High
Measure employees engagement	Knowledge	Train	High
Describe key elements in a core value	Knowledge	Train	High
Communicate importance of core values	Knowledge	Train	High
Validate the viability of goals	Knowledge	Train	High
Write clear and concise goals	Knowledge	Train	High
Implement incentive system	Knowledge	Train	High
Implement safety system	Knowledge	Train	High
Measure employees engagement	Knowledge	Train	High
Measure management engagement	Knowledge	Train	High
Calculate Personnel Utilization	Knowledge	Train	High
Prioritize Tasks	Knowledge	Train	High
Estimate Facilities Costs	Knowledge	Train	High
Estimate Personnel Costs	Knowledge	Train	High
Estimate Development Effort	Knowledge	Train	High
Analyze Risks	Knowledge	Train	High
Prioritize Risks	Knowledge	Train	High
Mitigate High Risks	Knowledge	Train	High
Contingency Plan	Knowledge	Train	High
Estimate Benefits and ROI	Knowledge	Train	High
Describe key elements of a goal	Knowledge	Train	High

Learning Objectives	Training Allocation	Classification	Priority	Length (Hours)
Describe key elements of a goal	Formal Training	Procedure	High	0.2
Validate the viability of goals	Formal Training	Procedure	High	0.2
Write clear and concise goals	Formal Training	Procedure	High	0.15
Identify Market Segments	Formal Training	Procedure	High	0.5
Implement incentive system	Workplace Training	Procedure	High	1.0
Measure employees engagement	Workplace Training	Procedure	High	0.25
Describe key elements in a core value	Workplace Training	Procedure	High	0.25
Communicate importance of core values	Workplace Training	Procedure	High	0.3
Prioritize Tasks	Workplace Training	Fact	High	0.5
Estimate Development Effort	Formal Training	Fact	High	0.75

### 4.3 Training Requirements Analysis Report

Generates the training requirements for each Competency and Competency Area, 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 Training Requirements Analysis Report:

**Step 1:** Click on  **Training Requirements Analysis Report** node under  **Competency 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.



Performance Objective	Enabling Objective	Objective Reference Code	Knowledge/Skills	Knowledge/Skills Reference Code	Learning Outcome	Classification	Entry Level	Desired Level	Gap
Set Course of Action		Lead-02-001							
	Prioritize Actions	Lead-02-001-001	Describe key elements of a goal Identify Market Segments Write clear and concise goals Validate the viability of goals	KSA 209 KSA 231 KSA 005 KSA 299	Knowledge Knowledge Knowledge Knowledge	Procedure Procedure Procedure Procedure	Skilled Skilled Skilled Skilled	3 3 3 3	
	Direct Staff	Lead-02-001-002	Prioritize Tasks Measure employees engagement Communicate importance of core values Implement incentive system	KSA 421 KSA 400 KSA 112 KSA 109	Knowledge Knowledge Knowledge Knowledge	Fact Procedure Procedure Procedure	Skilled Skilled Skilled Skilled	3 3 3 3	
	Monitor Personnel & Resources	Lead-02-001-003	Describe key elements in a core value Estimate Facilities Costs Estimate Development Effort Calculate Personnel Utilization Estimate Personnel Costs	KSA 404 KSA 604 KSA 088 KSA 119 KSA 018	Knowledge Knowledge Knowledge Knowledge Knowledge	Procedure Fact Fact Fact Fact	Skilled Skilled Skilled Skilled Skilled	3 3 3 3 3	
	Set Targets	Lead-02-002	Estimate Personnel Costs Measure employees engagement Measure management engagement	KSA 555 KSA 154 KSA 099	Knowledge Knowledge Knowledge	Procedure Procedure Procedure	Skilled Skilled Skilled	3 3 3	
	Forecast Personnel & Resource Requirements	Lead-02-002-001	Describe key elements of a goal Validate the viability of goals Write clear and concise goals	KSA 105 KSA 005 KSA 299	Knowledge Knowledge Knowledge	Fact Procedure Procedure	Skilled Skilled Skilled	3 3 3	
	Creates Action Plan	Lead-02-002-002	Calculate Personnel Utilization Estimate Facilities Costs Estimate Personnel Costs Measure employees engagement Measure management engagement	KSA 119 KSA 604 KSA 555 KSA 154 KSA 099	Knowledge Knowledge Knowledge Knowledge Knowledge	Fact Fact Fact Procedure Procedure	Skilled Skilled Skilled Skilled Skilled	3 3 3 3 3	
	Evaluate Results	Lead-02-002-003	Analyze Risks Prioritize Risks Implement safety system Validate the viability of goals Implement incentive system	KSA 299	Knowledge Knowledge Knowledge Knowledge Knowledge	Fact Fact Procedure Procedure Procedure	Skilled Skilled Skilled Skilled Skilled	3 3 3 3 3	

**Note:**

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

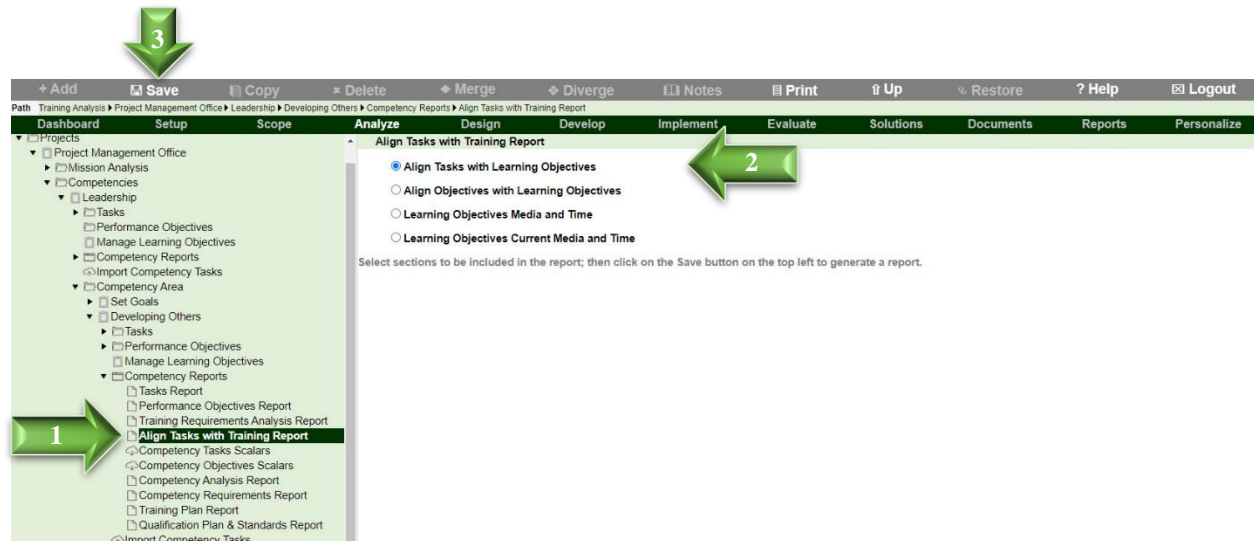
## 4.4 Align Tasks with Learning Objectives Report

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  **Competency 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.



The screenshot shows the software's navigation pane on the left and the main content area on the right. A green arrow labeled '1' points to the 'Align Tasks with Training Report' option in the 'Competency Reports' folder. A green arrow labeled '2' points to the 'Align Tasks with Learning Objectives' radio button in the main content area. A green arrow labeled '3' points to the 'Save' button in the top toolbar.

Path: Training Analysis > Project Management Office > Leadership > Developing Others > Competency Reports > Align Tasks with Training Report

Dashboard Setup Scope **Analyze** Design Develop Implement Evaluate Solutions Documents Reports Personalize

▼ Projects

- ▼ Project Management Office
  - ▼ Mission Analysis
  - ▼ Competencies
    - ▼ Leadership
      - ▼ Tasks
        - Performance Objectives
        - Manage Learning Objectives
      - ▼ Competency Reports
        - Import Competency Tasks
      - ▼ Competency Area
        - Set Goals
        - Developing Others
          - Tasks
          - Performance Objectives
          - Manage Learning Objectives
        - ▼ Competency Reports
          - Tasks Report
          - Performance Objectives Report
          - Training Requirements Analysis Report
          - Align Tasks with Training Report**
          - Competency Tasks Scalars
          - Competency Objectives, Scalars
          - Competency Analysis Report
          - Competency Requirements Report
          - Training Plan Report
          - Qualification Plan & Standards Report
        - Import Competency Tasks

Align Tasks with Training Report

- Align Tasks with Learning Objectives
- Align Objectives with Learning Objectives
- Learning Objectives Media and Time
- Learning Objectives Current Media and Time

Select sections to be included in the report; then click on the Save button on the top left to generate a report.

Toolbar: + Add Save Copy Delete Merge Diverge Notes Print Up Restore Help Logout

### 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 Training Report**

System:	Developing Others
Prepared by:	Administrator
Date:	02 July 2020 04:12 PM

**Align Tasks with Learning Objectives**

Task	Sub Task	Training Requirement	Performance/Enabling Objective	Training Allocation	Knowledge/Skills	Gap	Learning Objectives	Lesson	Courses
Set Course of Action		Train	Set Course of Action	Formal Training					
	Prioritize Actions	Train	Prioritize Actions	Formal Training	Identify Market Segments	Yes	Identify Market Segments	Market Analysis	Project Management
					Describe key elements of a goal	Yes	Describe key elements of a goal	Market Analysis	Project Management
					Validate the viability of goals	Yes	Validate the viability of goals	Market Analysis	Project Management
					Write clear and concise goals	Yes	Write clear and concise goals	Market Analysis	Project Management
	Direct Staff	Train	Direct Staff	Workplace Training	Implement incentive system	Yes	Implement incentive system	Market Analysis	Project Management
					Measure employees engagement	Yes	Measure employees engagement	Market Analysis	Project Management
					Describe key elements in a core value	Yes	Describe key elements in a core value	Market Analysis	Project Management
					Communicate importance of core values	Yes	Communicate importance of core values	Market Analysis	Project Management
					Prioritize Tasks	Yes	Prioritize Tasks	Market Analysis	Project Management
	Monitor Personnel & Resources	Train	Monitor Personnel & Resources	Formal Training	Measure employees engagement	Yes	Measure employees engagement	Cost Analysis	Project Management
					Measure management engagement	Yes	Measure management engagement	Cost Analysis	Project Management
					Calculate Personnel Utilization	Yes	Calculate Personnel Utilization	Cost Analysis	Project Management
					Estimate Facilities Costs	Yes	Estimate Facilities Costs	Cost Analysis	Project Management
					Estimate Personnel Costs	Yes	Estimate Personnel Costs	Cost Analysis	Project Management
					Estimate Development Effort	Yes	Estimate Development Effort	Cost Analysis	Project Management
					Estimate Benefits and ROI	Yes	Estimate Benefits and ROI	Cost Analysis	Project Management
					Validate the viability of goals	Yes	Validate the viability of goals	Cost Analysis	Project Management

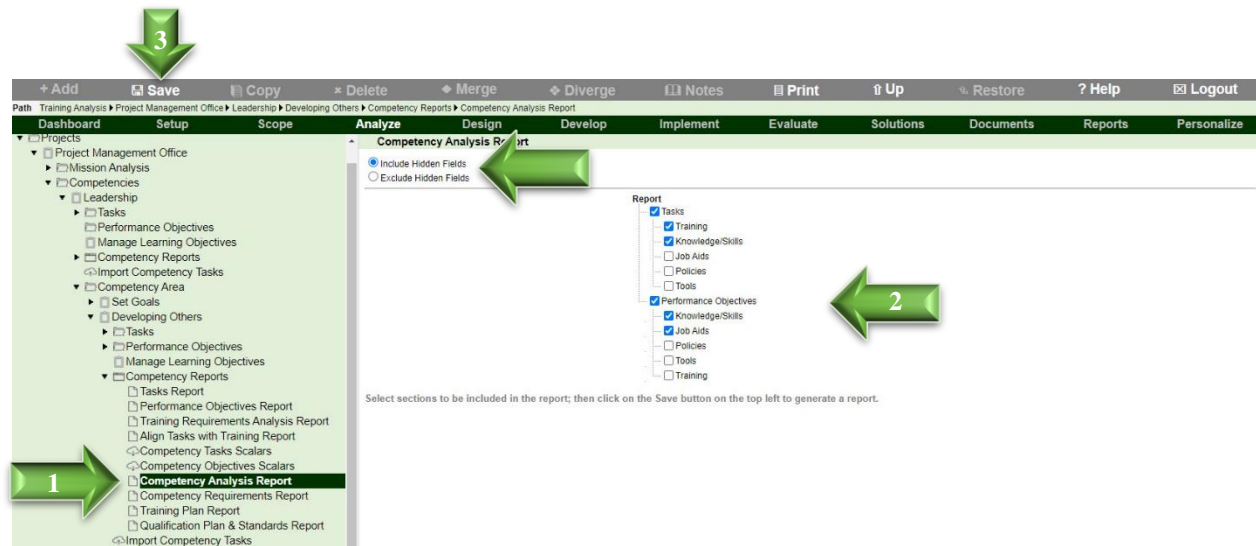
## 4.5 System/Competency Analysis Report

To generate a comprehensive report for each system/competency including tasks, performance/enabling objectives, learning objectives, training requirements and attributes:

**Step 1:** Click on the  **System/Competency Analysis Report** node under the  **System/Competency Reports** folder.

**Step 2:** Select items to be included by placing checkmarks next to the desired sections.

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



The screenshot shows the ADVISOR software interface for generating a System/Competency Analysis Report. The top navigation bar includes buttons for + Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Up, Restore, Help, and Logout. The breadcrumb path is: Training Analysis > Project Management Office > Leadership > Developing Others > Competency Reports > Competency Analysis Report. The main interface is divided into several tabs: Dashboard, Setup, Scope, Analyze, Design, Develop, Implement, Evaluate, Solutions, Documents, Reports, and Personalize. The left sidebar shows a tree view of the system structure, with 'Competency Analysis Report' selected under 'Competency Reports'. The main area has two radio buttons: 'Include Hidden Fields' (selected) and 'Exclude Hidden Fields'. Below this is a 'Report' section with a list of items to be included in the report, each with a checkbox: Tasks (checked), Training (checked), Knowledge/Skills (checked), Job Aids (unchecked), Policies (unchecked), Tools (unchecked), Performance Objectives (checked), Knowledge/Skills (checked), Job Aids (checked), Policies (unchecked), and Training (unchecked). A 'Save' button is located at the top left of the main area. Green arrows labeled 1, 2, and 3 point to the 'Competency Analysis Report' node in the tree, the 'Report' list, and the 'Save' button respectively.

### Notes:

- 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.

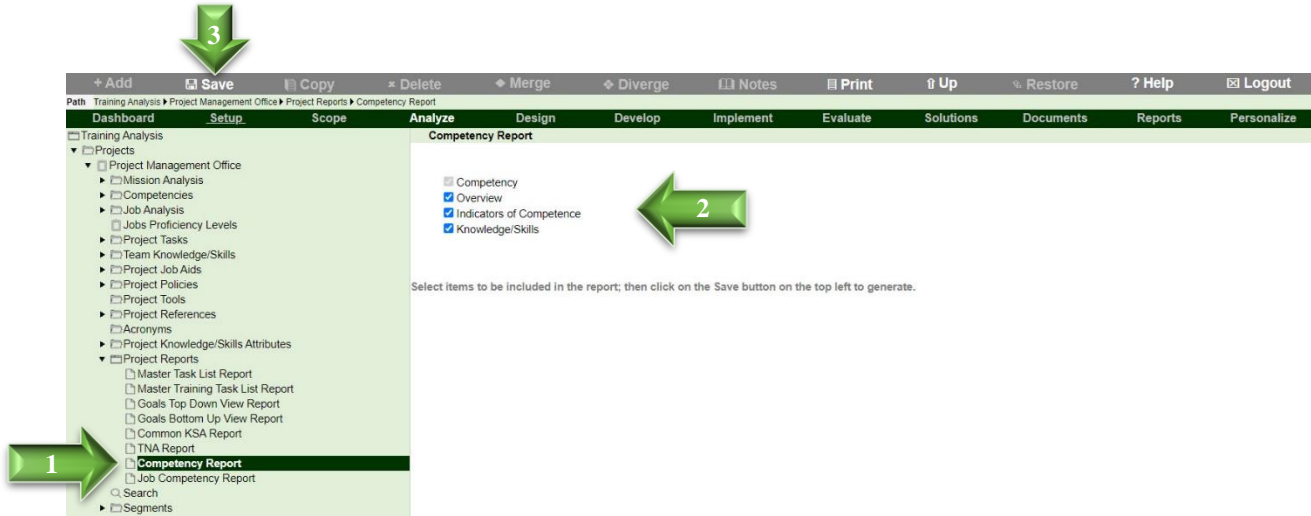
## 4.6 Systems/Competency Report

To generate the Systems/Competency Report:

**Step 1:** Click on  **Systems/Competency Report** node under the  **Project Reports** folder.

**Step 2:** Select items to be included by placing checkmarks next to the desired sections.

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



The screenshot shows the ADVISOR software interface. The top toolbar includes buttons for + Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Up, Restore, Help, and Logout. The breadcrumb path is: Training Analysis > Project Management Office > Project Reports > Competency Report. The main menu is divided into sections: Dashboard, Setup, Scope, Analyze, Design, Develop, Implement, Evaluate, Solutions, Documents, Reports, and Personalize. The left sidebar shows a tree view under 'Training Analysis' > 'Projects' > 'Project Management Office' > 'Competency Reports', with 'Competency Report' selected. The main panel shows the 'Competency Report' configuration with three checked options: Overview, Indicators of Competence, and Knowledge/Skills. A green arrow labeled '1' points to the 'Competency Report' item in the sidebar. A green arrow labeled '2' points to the checked options in the main panel. A green arrow labeled '3' points to the 'Save' button in the toolbar.

**Step 4:** 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.



The screenshot shows the 'Competency Report' window. In the top left corner, there is a button labeled '[Generate Word Doc]'. A green arrow labeled '4' points to this button. Below the button is a table with the following data:

Competency	Competency Area	Overview	Indicators of Competence	Knowledge/Skills
	Set Goals	Set target goals and measure achievements		<ul style="list-style-type: none"> <li>Identify Market Segments</li> <li>Implement incentive system</li> <li>Describe key elements of a goal</li> <li>Validate the viability of goals</li> <li>Write clear and concise goals</li> <li>Implement incentive system</li> <li>Measure employees engagement</li> <li>Describe key elements in a core value</li> <li>Communicate importance of core values</li> <li>Validate the viability of goals</li> <li>Write clear and concise goals</li> <li>Implement safety system</li> <li>Measure management engagement</li> <li>Measure employees engagement</li> <li>Calculate Personnel Utilization</li> <li>Prioritize Tasks</li> <li>Estimate Facilities Costs</li> <li>Estimate Personnel Costs</li> <li>Estimate Development Effort</li> <li>Analyze Risks</li> <li>Prioritize Risks</li> <li>Mitigate High Risks</li> <li>Contingency Plan</li> <li>Estimate Benefits and ROI</li> <li>Describe key elements of a goal</li> <li>Describe various venues for motivating employees</li> <li>Assess best venue for motivating employees</li> <li>Assess best venue for motivating managers</li> <li>Measure management engagement</li> <li>Measure employees engagement</li> <li>Prioritize Customer Needs</li> <li>Assess best venue for motivating employees</li> </ul>
Leadership	Developing Others	Provide guidance, direction, control and management	<ul style="list-style-type: none"> <li>Set Course of Action</li> <li>Set Targets</li> </ul>	
	Conflict Management	Analyze conflicts and apply necessary interventions, in line with policies and procedures, in order to resolve issues.	<ul style="list-style-type: none"> <li>Resolve Conflict</li> </ul>	
	Flexibility	Ensure flexibility in approach, style and management to meets varied needs	<ul style="list-style-type: none"> <li>Adjust Market Strategy</li> </ul>	
General	Initiative	Take initiative throughout the organization in order to help peers development and better meet client needs	<ul style="list-style-type: none"> <li>Set Course of Action</li> <li>Create incentive system</li> </ul>	

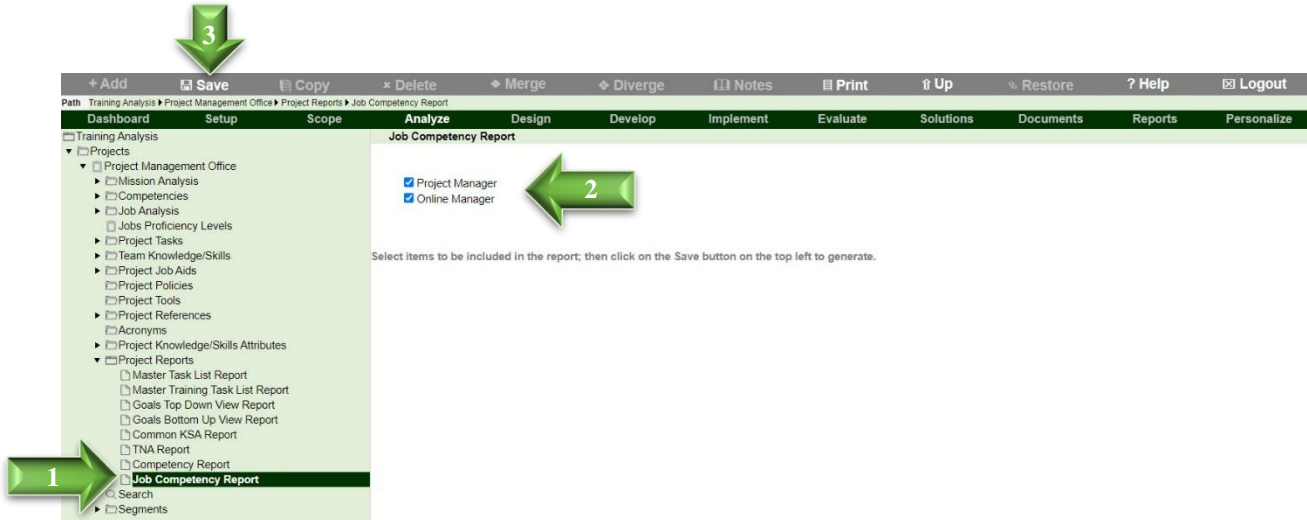
## 4.7 Job System/Competency Report

To generate the Job System/Competency Report:

**Step 1:** Click on  **Job System/Competency Report** node under the  **Project Reports** folder.

**Step 2:** Select Jobs to be included by placing checkmarks next to the desired items.

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



The screenshot shows the software interface with a top toolbar containing buttons like + Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Up, Restore, Help, and Logout. Below the toolbar is a navigation menu with tabs: Dashboard, Setup, Scope, Analyze, Design, Develop, Implement, Evaluate, Solutions, Documents, Reports, and Personalize. The left sidebar shows a tree view of folders and reports, with 'Job Competency Report' selected. The main area displays 'Job Competency Report' with checkboxes for 'Project Manager' and 'Online Manager'. A message below says 'Select items to be included in the report; then click on the Save button on the top left to generate.'


**Step 4:** 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



The screenshot shows the 'Job Competency Report' window with a 'Generate Excel' button in the top left corner. A green arrow labeled '4' points to this button.

Project:	Project Management Office
Prepared by:	Administrator
Date:	08 July 2020 01:29 PM

Competency	Competency Area	Project Manager	Online Manager
<b>Leadership</b>		Skilled	Skilled
	Set Goals	Skilled	Semi-Skilled
	Developing Others	Highly Skilled	Skilled
<b>General</b>		Skilled	Skilled
	Conflict Management	Highly Skilled	Semi-Skilled
	Flexibility	Skilled	Semi-Skilled
	Initiative	Skilled	Skilled

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!