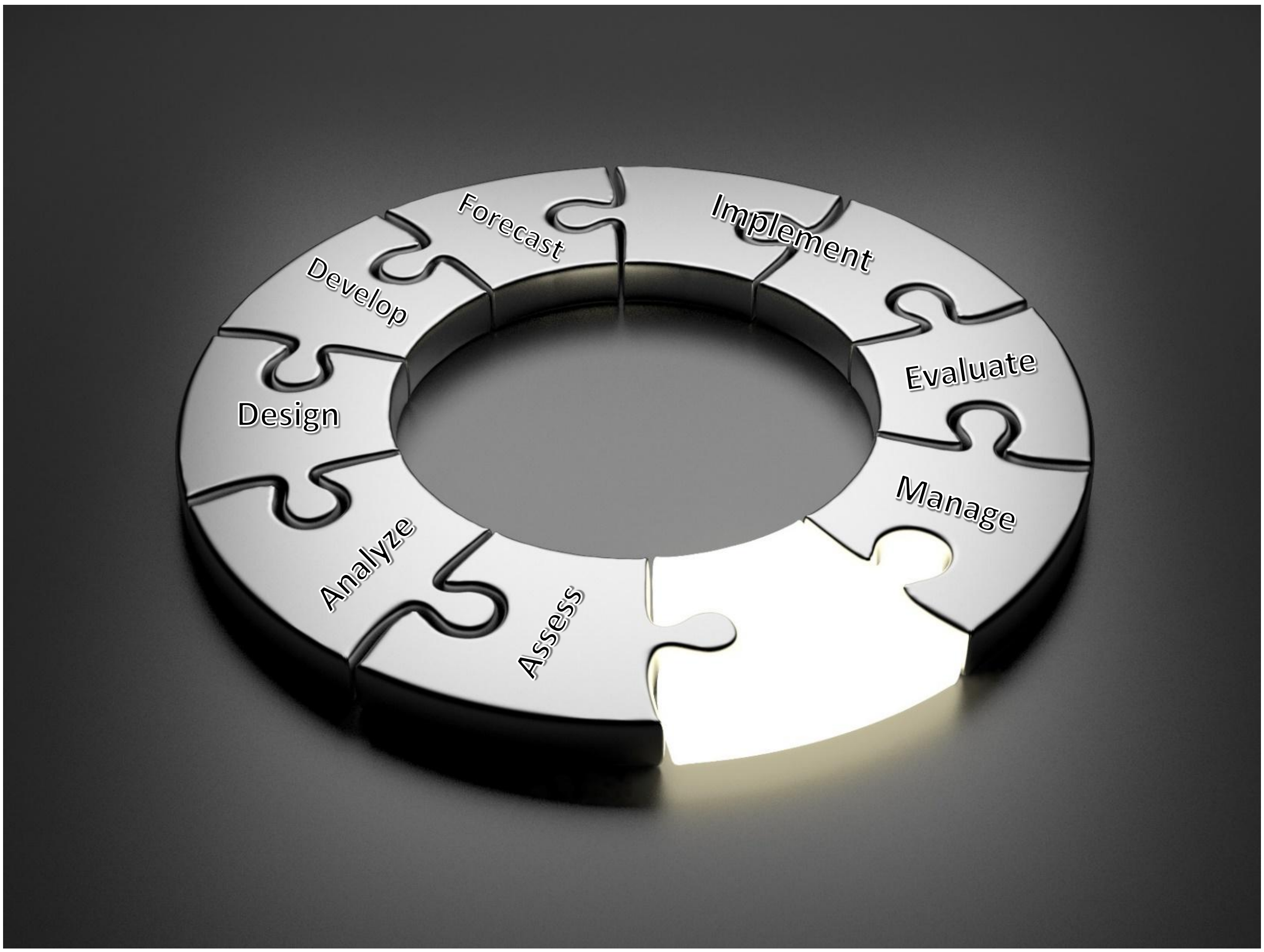
Configure ADVISOR Step by Step Guide



ADVISOR Enterprise User's Guide

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Foreword

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

Request Management System

Manage. A centralized platform to capture, track, manage, and report on all clients and internal requests. It ensures that every request – whether operational, technical, administrative, or training-related – is logged, assigned, monitored, and resolved in a structured, transparent way. Request Management captures all incoming requests in one place, generates project plans, assigns requests to the right individual or team, allocates resources, tracks progress from start to finish, measures effort, cost, and resolution time, provides transparency and accountability, and generates reports and insights.

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 generating 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].

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Training Schedule	**I**mplementation: To find out "*how training should be implemented*". Organizes, structures and manages the delivery of training. It turns training plans, courses, lessons, instructors, and resources into a coherent, conflict-free schedule that can be executed. It is a centralized tool that builds complete course schedules (lessons, activities and prerequisites), assigns personnel, facilities, equipment and trainees, ensures prerequisites and sequencing rules are respected, generates course-level schedules, instructor schedules, resource schedules and trainee timetables, prevents conflicts, and provides visibility on who is training when, where and what. It ensures that training is delivered accurately, efficiently and consistently.
Performance Analysis	**E**valuation: 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	**M**anage: To "*continually uncover venues to drive training effectiveness & efficiency*". Maintains training effectiveness and efficiency over time by continually assessing the impact of changes to missions, jobs, tasks, systems, policies, technologies, throughput, and so forth on training content and activities; as well as budget, personnel and resource requirements. This is attained through a digital-twin model that continually aligns training activities to operational requirements to identify gaps, duplications and training with minimal value. Results (personnel/resource requirements for any time period; cost drivers; bottlenecks and deficiencies) are quickly and concisely communicated through dashboards. Actions that drive training effectiveness and efficiency are also highlighted.

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Chapter 1: Getting Started

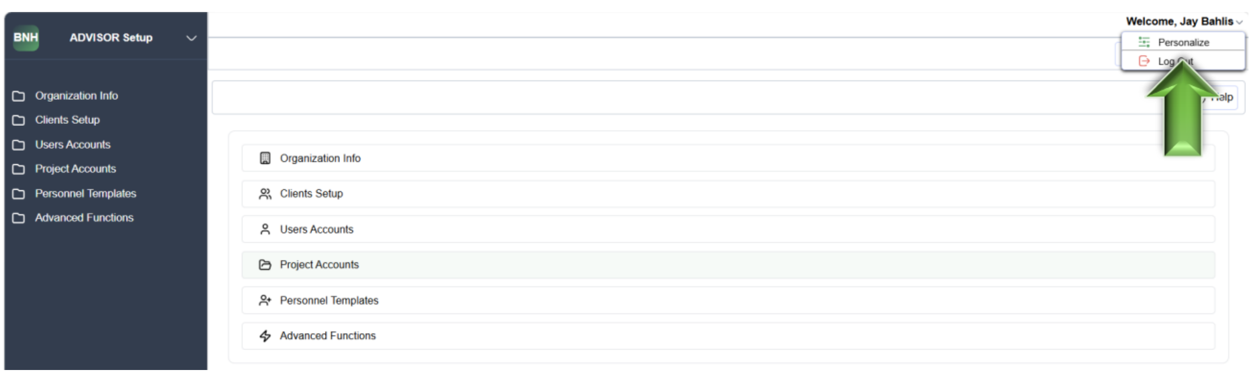
1.1 Introduction

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

1.2 Getting Started

To log on to ADVISOR Enterprise, go to http://www.bnhexpertsoft.com, click on "**Log in**", input your Username and Password, and click [**Login**]. A Popup Window with step-by-step instructions is presented to familiarize you with ADVISOR. You may change your username, password and preferences by:
Step 1: Clicking on the **Personalize** option under the (username)
Step 2: Clicking on the **Preferences** node
Step 3: Editing the required items
Step 4: Clicking [**Save**].

For example, you may hide or display the ADVISOR Tour Window under the **Options** tab under the **Preferences** node by placing or removing the checkmark next to the ADVISOR Tour field and clicking [**Save**]. Context sensitive online help is also available for each field by clicking on [**Help**].



To make the most out of ADVISOR Enterprise, Chapters 2 through 4 should be thoroughly reviewed to gain clear understanding of ADVISOR's key functionality and how it can be configured and managed. This includes:
- How to add, edit, delete and import various elements such as Tasks, Knowledge, Skills, etc.?
- How to setup/configure Clients?
- How to setup User accounts and assign privileges?
- How to setup Instructional Design and Cost Templates; and why?

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1.5 How is ADVISOR Organized?

ADVISOR includes six main components arranged across three adjustable windows – the top, left, and right panels. You can resize these windows by dragging their borders to create the layout that works best for you. Once you become familiar with these components, ADVISOR's operation and navigation become straightforward.

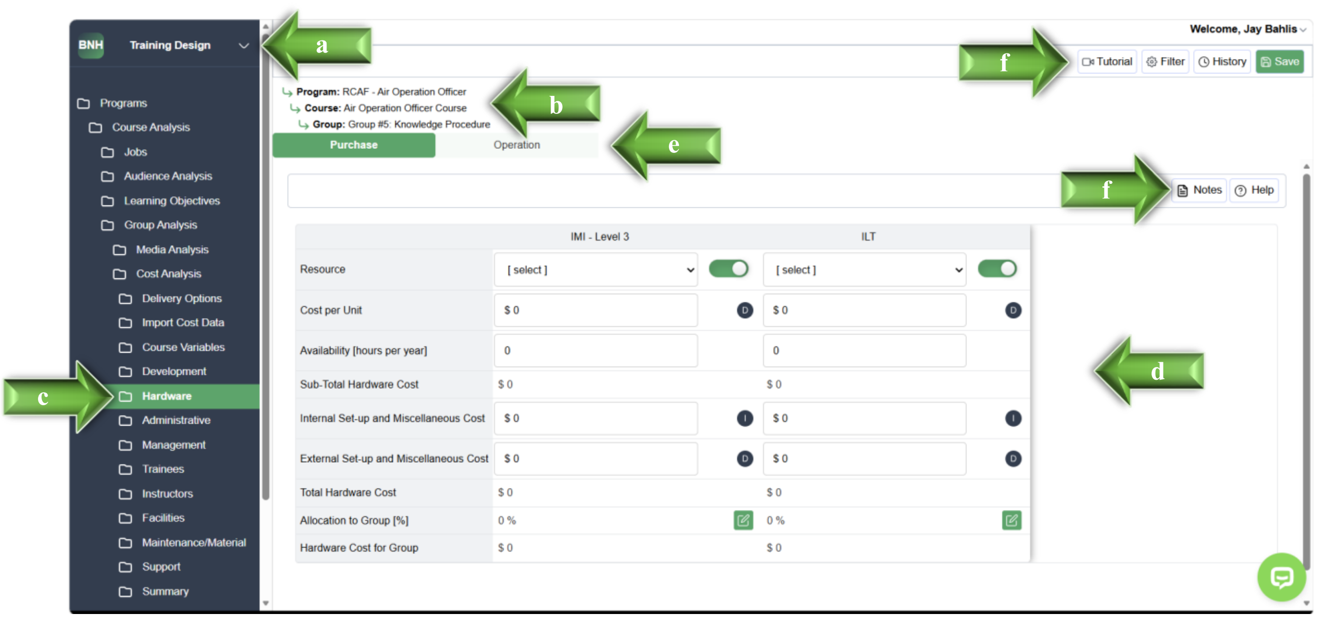
a) Modules (dropdown). Is your main navigation point for accessing and configuring licensed ADVISOR Enterprise module. It lists all modules available to your account, allowing you to switch quickly between functions such as Training Analysis, Training Design, Resource Management, and others. To select a module, click on ˅ next to the module title, and select the desired option.

b) Path (top window). Shows where you are within ADVISOR and tracks your progress as you navigate through screens. It acts as a breadcrumb trail, helping you understand your current location and how you arrived there. It can also be used as a quick navigation tool. Clicking on any title instantly takes you back to that point, without needing to reopen menus or retrace your steps manually.

c) Menu (left window). Lists options available to you within the selected module. It expands or contracts dynamically based on what functions, screens, or tools are relevant at each step. As you navigate through ADVISOR, the Menu updates to show only the options that apply to your current context, helping reduce clutter and making it easier to find what you need. Clicking any item in the Menu will take you directly to that function or screen.

d) Main Window (right window). Displays the full content of whichever screen or tab you are currently working on. All details, forms, tables, and configuration options for that part of ADVISOR appear here. As you navigate through modules and menu options, the Main Window updates to show the corresponding information and tools. It is the primary workspace where you review data, complete tasks, enter information, and interact with ADVISOR's features.

e) Tabs (top of right window). Some nodes in ADVISOR contain multiple sets of information that are organized into Tabs at the top of the Main Window. Click on tab title to view its contents.



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f) Action Buttons. The Action Buttons give you quick access to the most common operations within ADVISOR. These buttons appear in the Main Window and allow you to manage records, update information, adjust hierarchies, and access support tools. You can use Action Buttons to:

- **Add**, **Duplicate**, or **Delete** a record
- **Save** information (data is *only* stored when you click Save)
- **Import** and **Export** Excel and xml data file
- **Select** and **Deselect** items
- **Merge** and **Diverge** records
- Edit Multiple Records at once (**Edit All**)
- Modify the hierarchy of items (**Edit Tree**)
- Add **Notes** to a screen
- Configure ADVISOR using **Filter** Fields
- Access the **History** of changes for audit and traceability
- Open context-sensitive **Help** or **Tutorials**

These buttons streamline your workflow and ensure that all key actions are always within reach.

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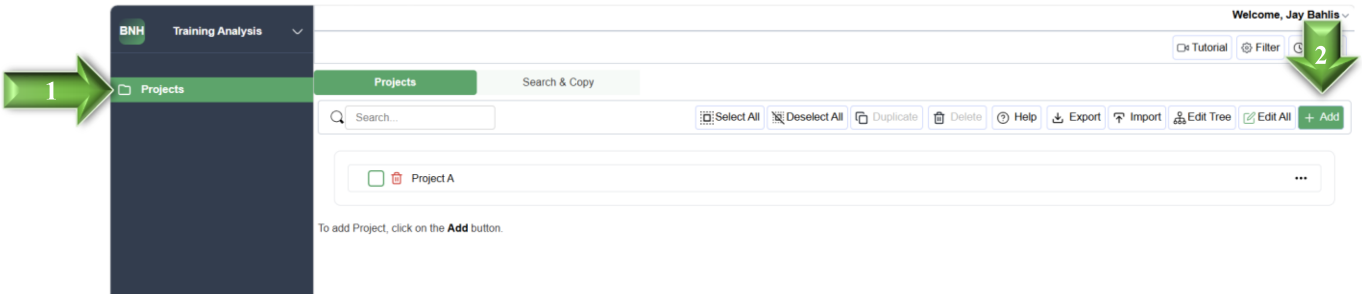
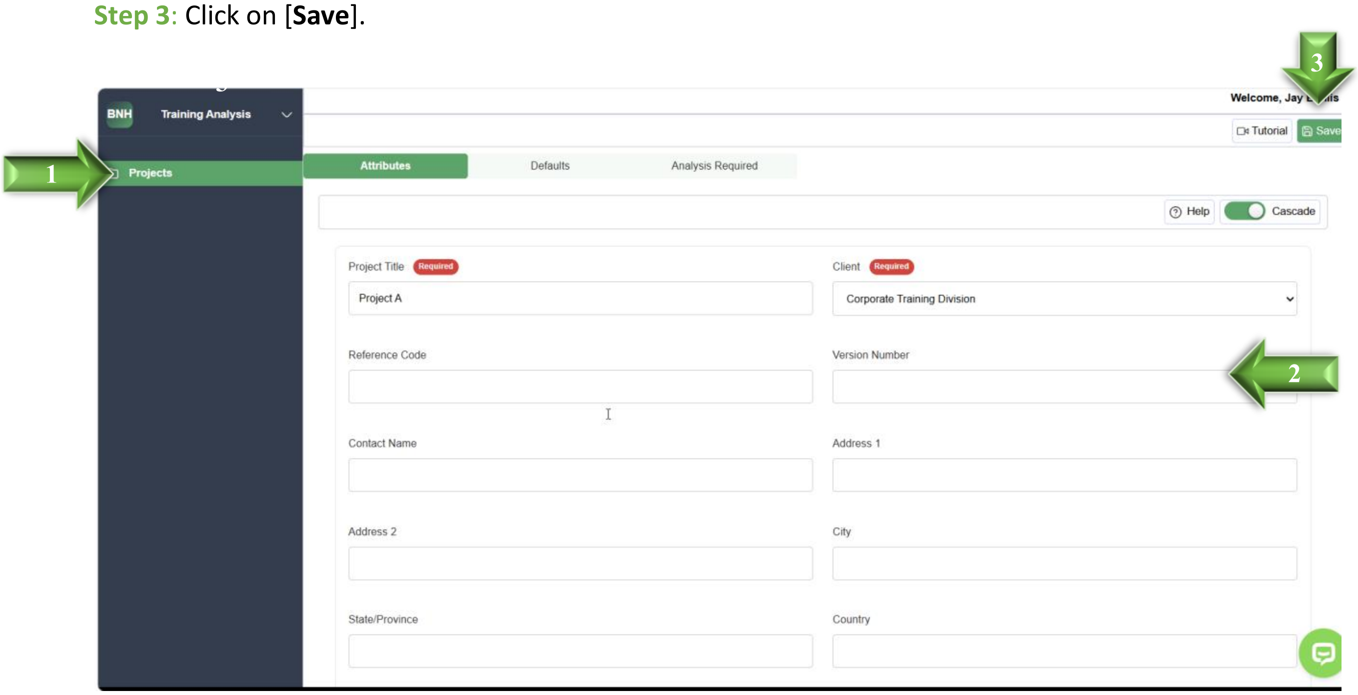
1.4 Basic ADVISOR Functions

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



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



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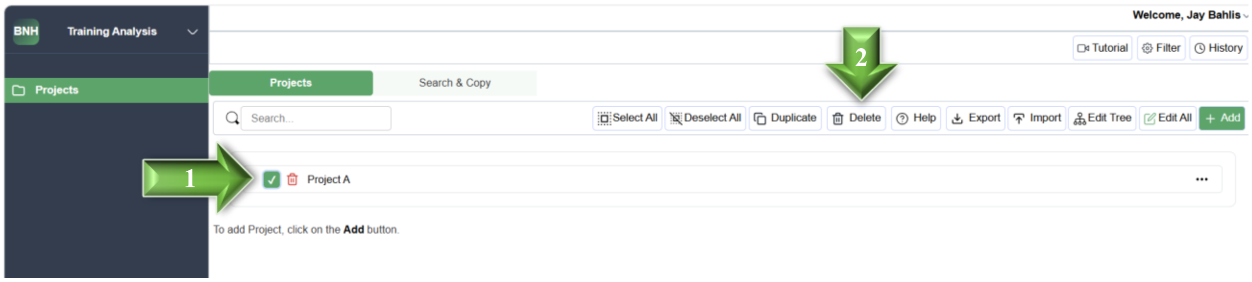
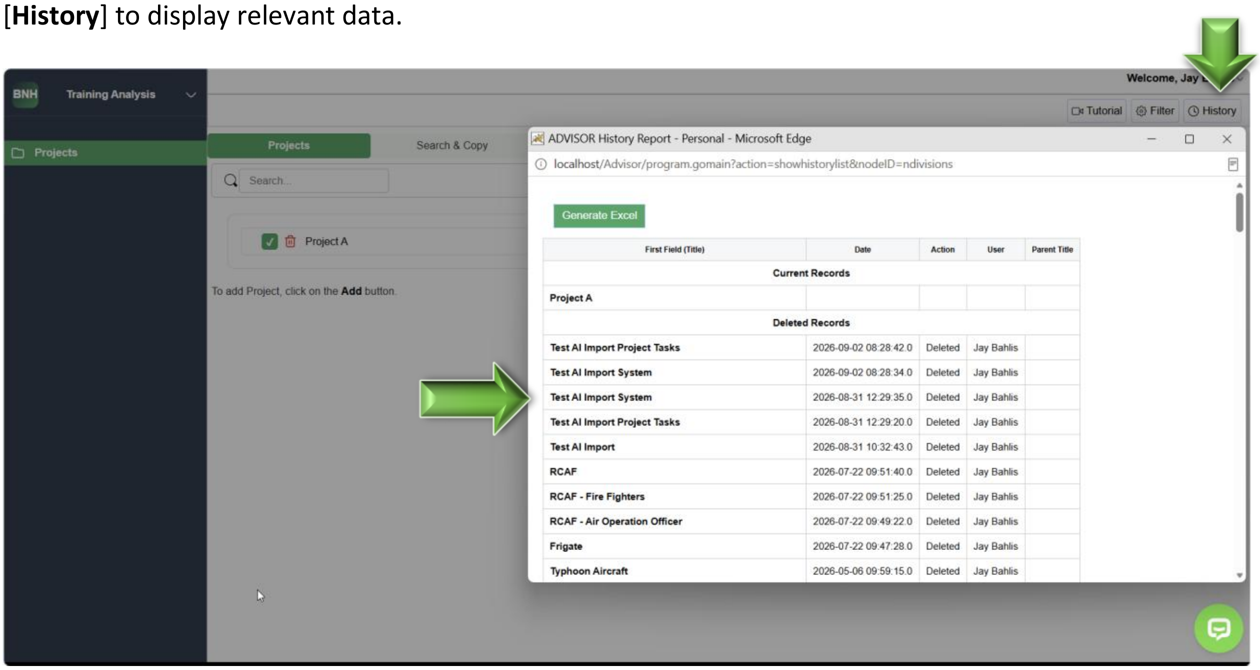
Delete: To delete a Project, Mission, Job, Task, Objective, Course or any other record:
Step 1: Place checkmarks next to the desired records (Project A, for example).
Step 2: Click on [**Delete**].



Track Changes: To find out when a record was created, modified or deleted and by whom, click on the [**History**] to display relevant data.



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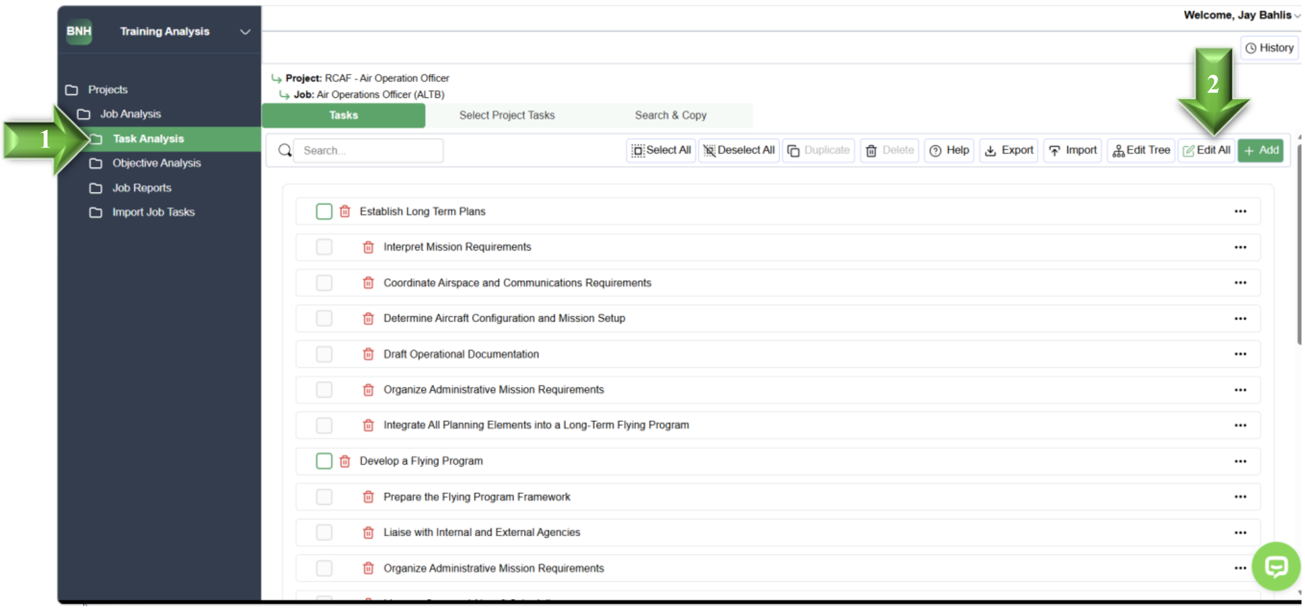
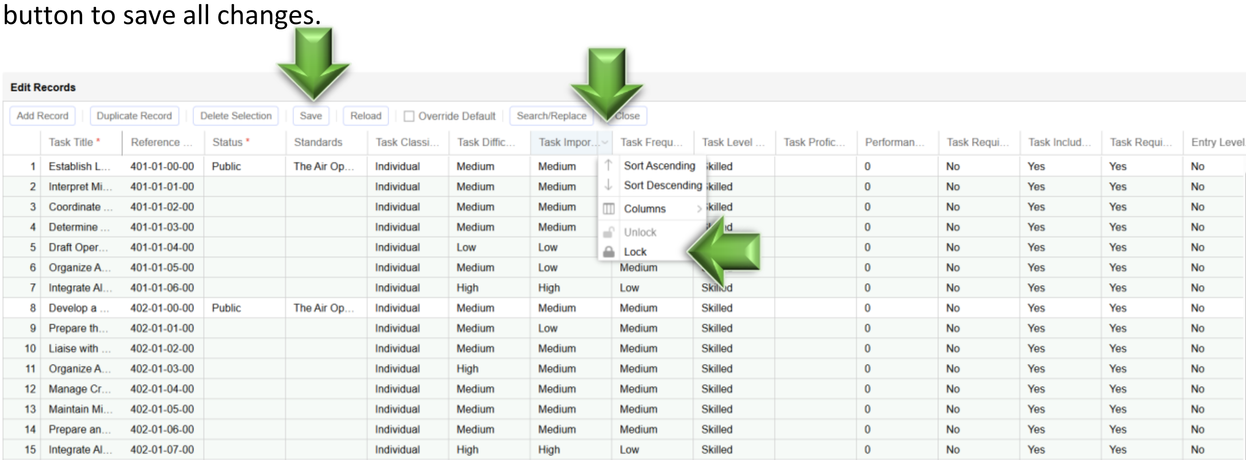
Edit Multiple Records: To edit multiple Projects, Missions, Jobs, Tasks, Objectives, Courses or any other records:
Step 1: Click on the corresponding folder.
Step 2: Click on the [**Edit All**].



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



Notes:

- Fields/Attributes hidden in ADIVSOR main screen, will be automatically hidden in the Edit All window.
- You can reorder fields by dragging and dropping columns to the desired position, placing checkmark next to Override Default field, and clicking [**Save**]. Preferred order will be maintained for all projects. To restore default order, remove the checkmark next to Override Default field and click [**Save**].

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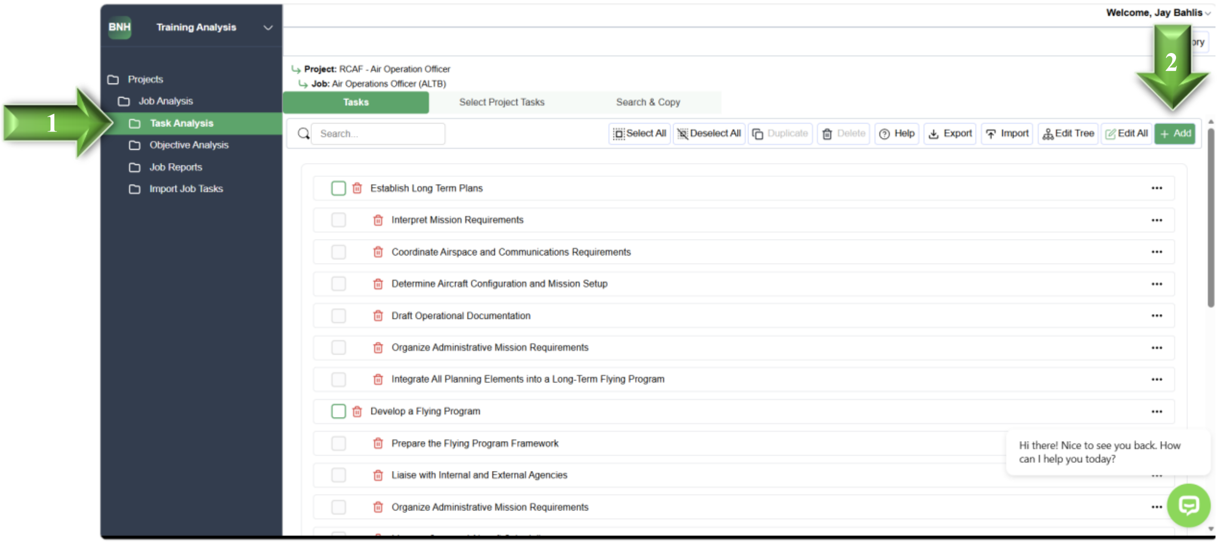
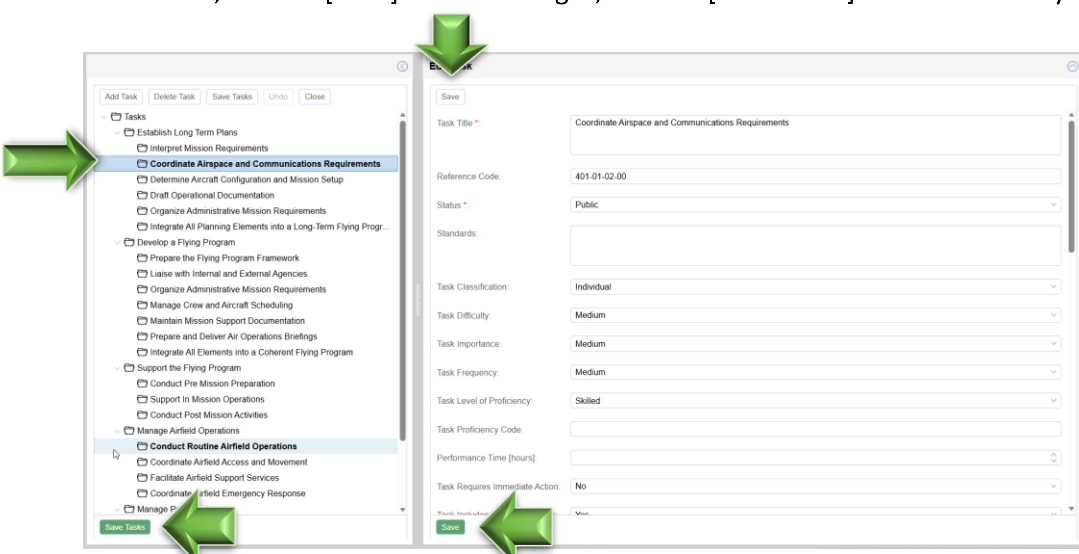
Modify Hierarchy: To change the hierarchy or the order of Tasks or Objectives:
Step 1: Click on the corresponding folder.
Step 2: Click on [**Edit Tree**] icon.



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



Notes:

- To copy record including children, right click on record (Task, for example) and select "Copy". Next, right click on another record in tree and click "Paste".
- To delete multiple records at one time, press "Ctrl +C" to select tasks and click "Delete Task" button.
- Status of folders (i.e., open or closed) is maintained after each Save.
- To minimize data loss due to timeout, warning is provided to alert users to save data each 15 minutes.

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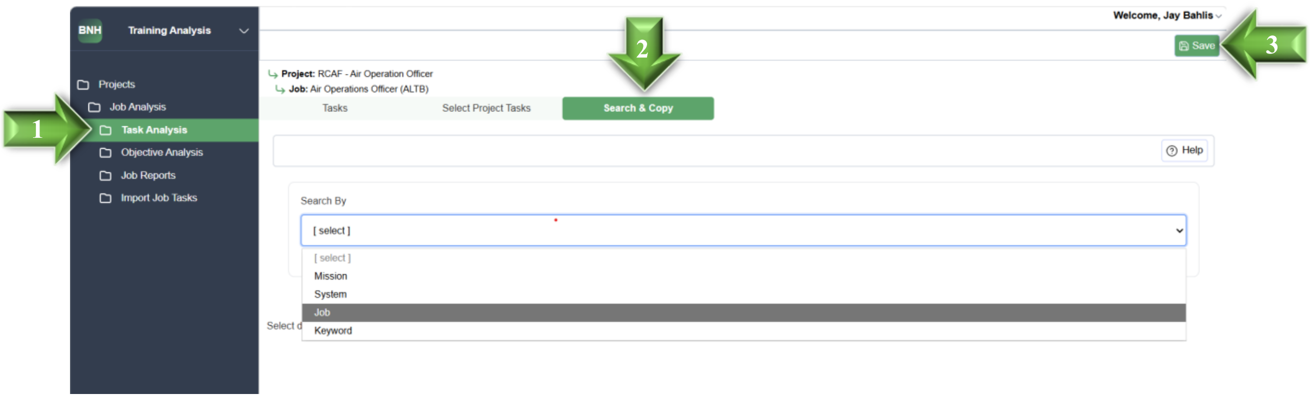
Search and Copy: You can search and copy Missions, Systems, Jobs, Tasks, Performance Objectives, Courses and so forth, as follows:

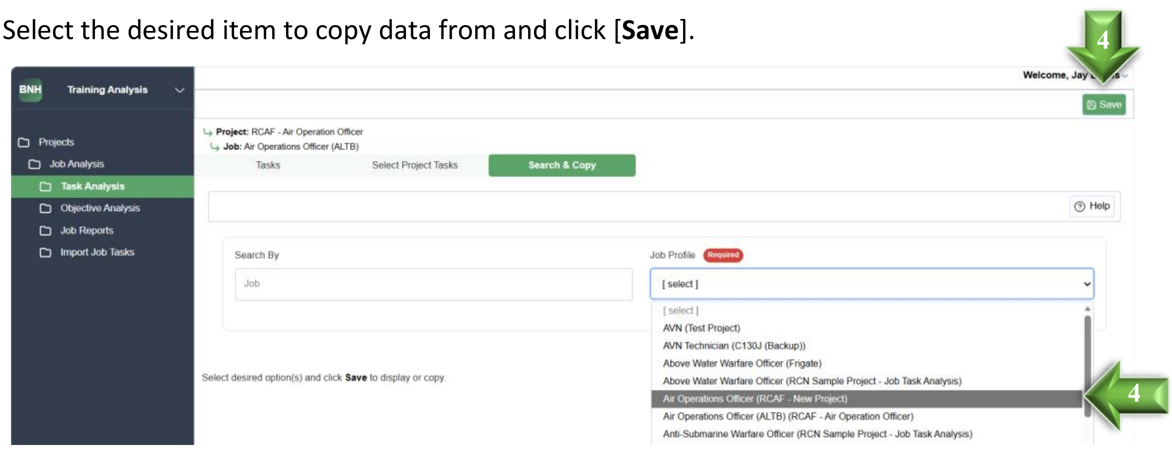
Step 1: Click on the desired folder – Mission Analysis, System Analysis, Job Analysis, Tasks Analysis, Performance Objectives or Course Analysis.

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

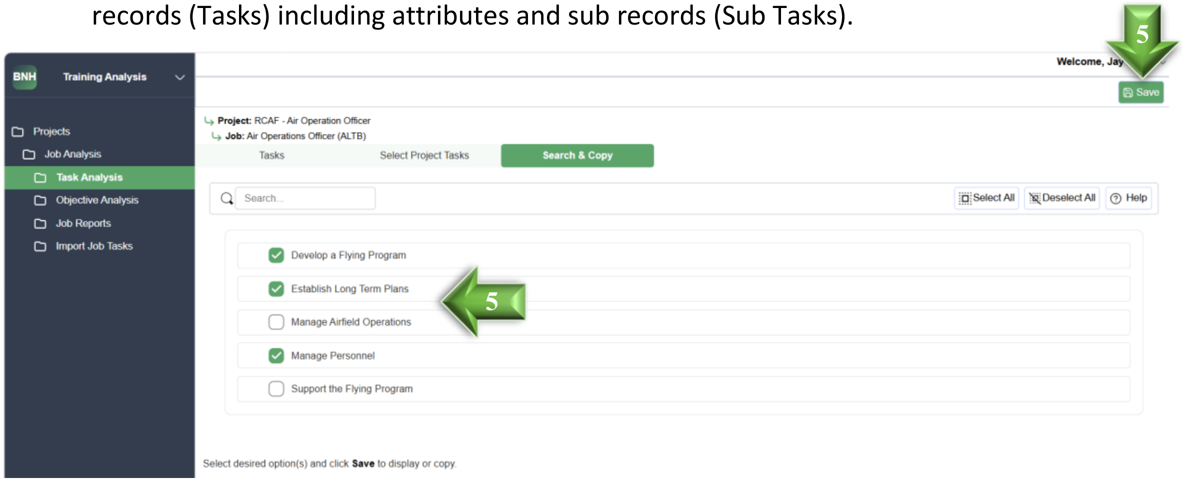
Step 3: Select the desired search criterion and click [**Save**] – more options may be provided – to display available elements.



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



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



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Import Data: Dozens of Excel Spreadsheets are provided at http://www.bnhexpertsoft.com/data-collection-forms-configuration-version-12 to simplify and speed offline data collection from Subject Matter Experts (SMEs). The attributes and options within each form (Job Tasks, for example) are identical to the corresponding (Job Tasks) fields within ADVISOR. Once completed, the data can be uploaded to ADVISOR Enterprise with a few mouse clicks, as follows:

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

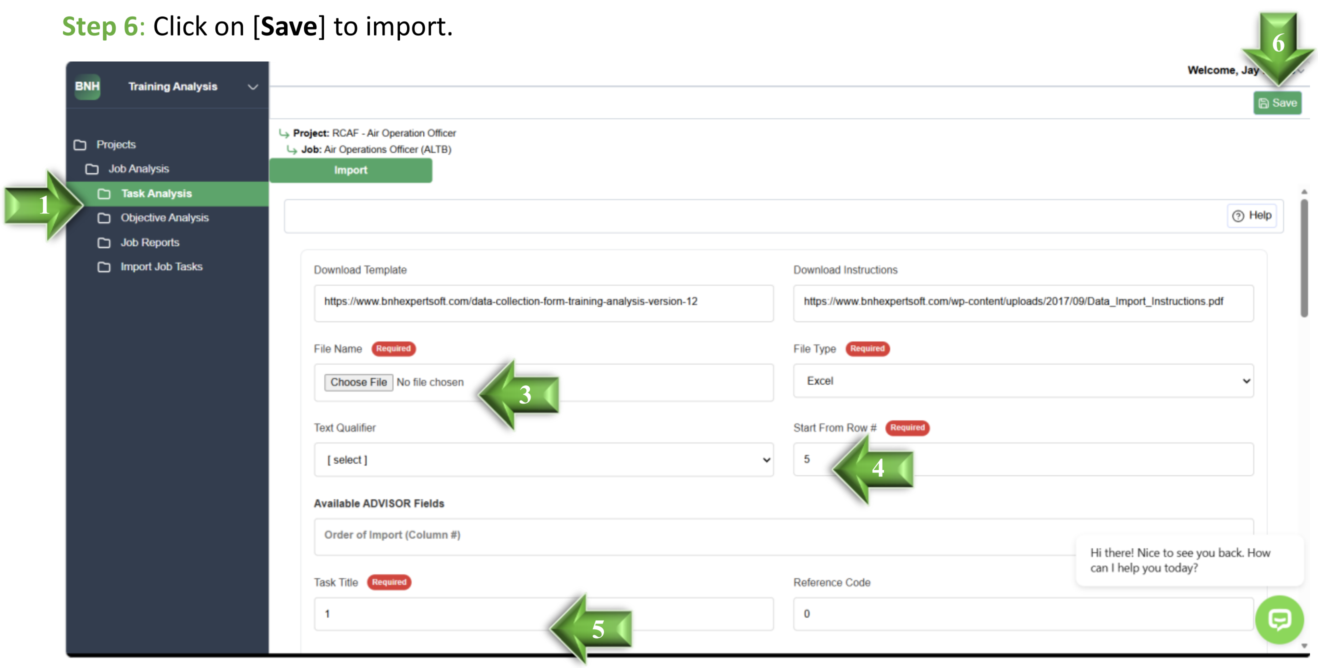
Step 2: Click the [**Import**] button to start the upload process. In some cases, you are given the option to import either **Excel** or **xml**. Select the format that corresponds to the data you are working with.

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

Step 4: Indicate the Row on which data import should begin by entering the appropriate value in the **Start From Row #** field. The top 4 rows in ADVISOR Excel spreadsheets are reserved for headings and instructions. Collected data typically starts on Row 5.

Step 5: Indicate where the data for each field resides within the Excel spreadsheet by entering the corresponding column number. For example, if **Task Title** is stored in **Column 1**, then enter **1** in the Task Title field. Data in Excel spreadsheets is sequentially mapped to the corresponding fields in ADVISOR. You are not required to import all attributes. If certain fields – such as Status or Task Classification – are not needed, simply leave their column number fields blank. ADVISOR will not import data for any attribute that has not been assigned a column number.

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



Note: The **Reference Code** is also used by ADVISOR to detect duplicate records during import. When a Job Task is imported, ADVISOR first checks whether the Job already contains a Task with the same Reference Code. If a matching Reference Code is found, ADVISOR displays the following message “Duplicate Records already exist”. Selecting **Ok** updates existing Job Tasks in ADVISOR with the imported attributes. Selecting Cancel, aborts the import.

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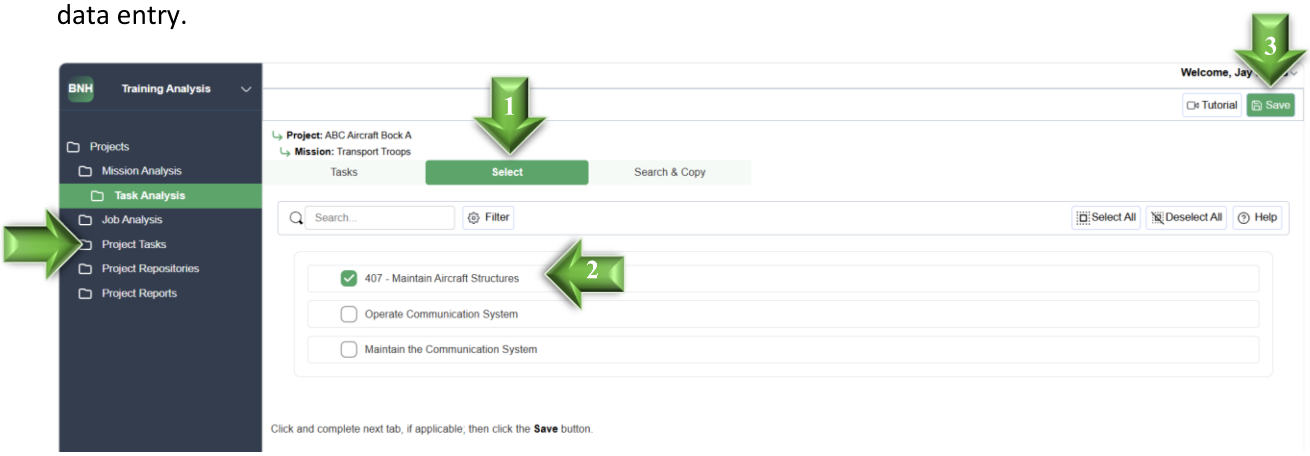
Assign Tasks to Missions, Systems or Jobs: To minimize duplication when adding Mission, or System Tasks, each Task is first stored under Project Tasks, which serves as a centralized repository. Tasks can then be assigned to any Mission, System, or Job by clicking the [**Select**] tab, placing checkmarks next to the desired Tasks, and clicking [**Save**]. This ensures consistency across the system and reduces repetitive data entry.



Assign KSAs to Tasks or Objectives: Similarly, Knowledge, Skills and Attitudes (KSAs) are stored under Team Knowledge/Skills/Attributes within Project Repositories, which serves as a centralized repository. KSAs and can be assigned to any Task or Objective by clicking the [**Select**] tab, placing checkmarks next to the desired KSAs, and clicking [**Save**].

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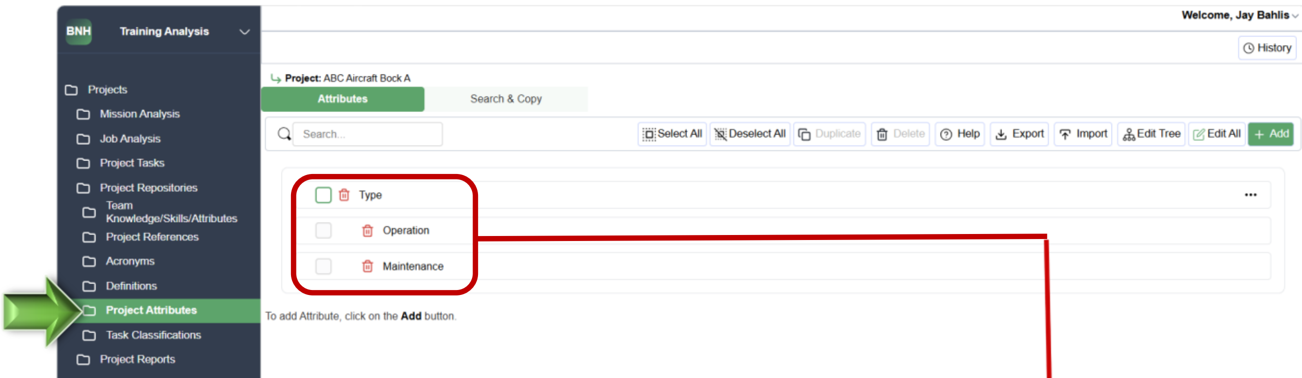
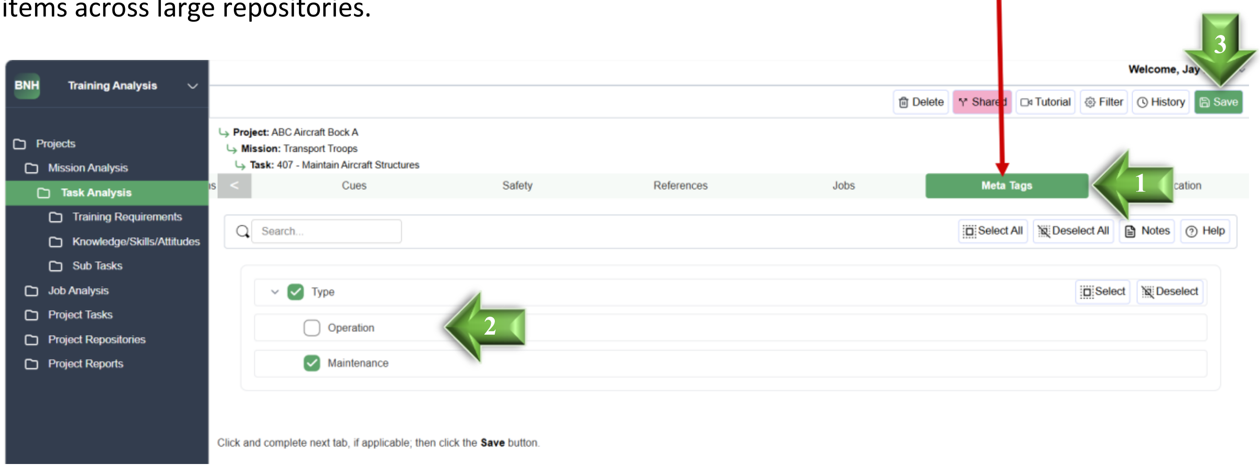
Setup and Assign Meta Tags: To quickly zero in on desired Tasks or KSAs within a repository, Meta Tags can be created under the Project Attributes folder.



Once created, Meta Tags can be assigned to any Task or KSA by clicking the [**Meta Tag**] tab, selecting the desired Meta Tags, and clicking [**Save**]**.** This allows users to efficiently filter, group, and locate related items across large repositories.



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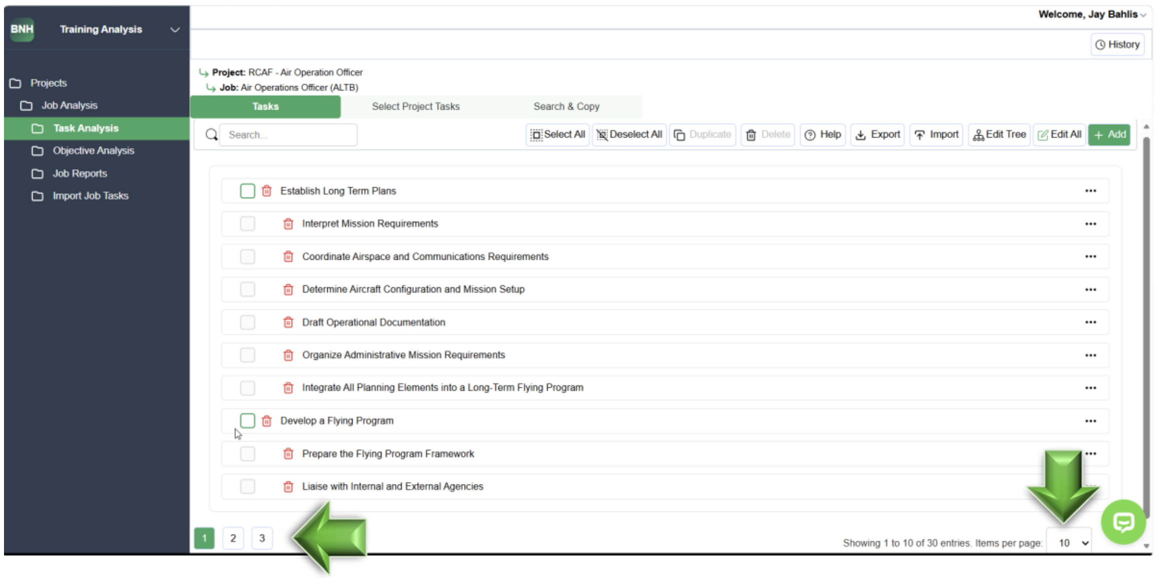
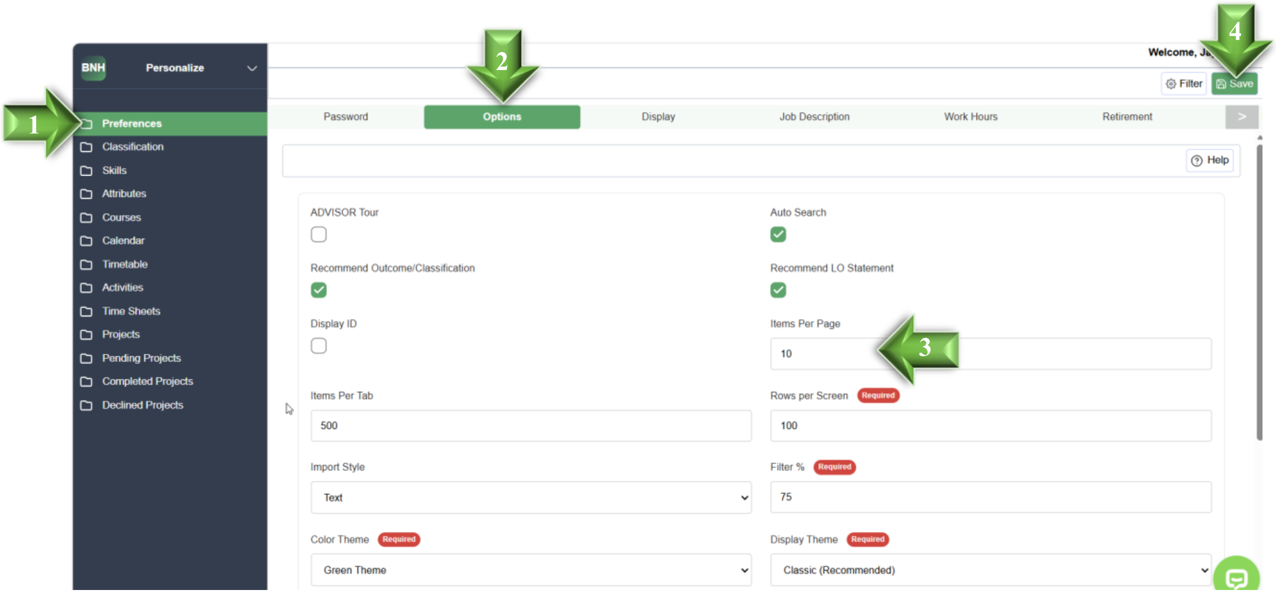
Display Settings – Records per Page: By default, 10 items (such as Projects, Tasks, Objectives, Knowledge/ Skills/Attitudes, and others) are displayed on each page. When the number of items exceeds 10, the additional items are shown on subsequent pages. The total number of pages available is displayed at the bottom left of the list. To view the items on a specific page, simply click the corresponding **page number**.



Modify the Number of Records Displayed per Page: You can adjust how many records are displayed on each page in two ways:

1. **Quick Adjustment:** Click on **v** next to items per page field and select the desired value from the dropdown list (see above).

2. **Persoalized Setting:** Select [**Personalize**] under username, click [**Preferences**] and click the [**Options**] tab. Under Specify number of records to be displayed Under Items per Screen field and clicking [**Save**].



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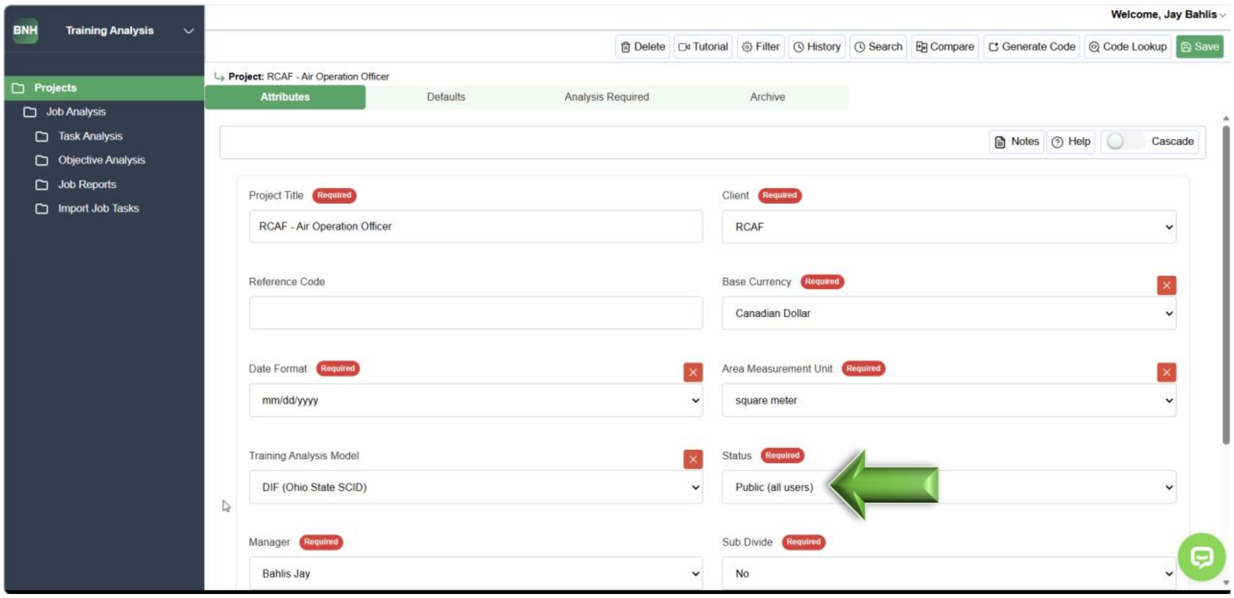
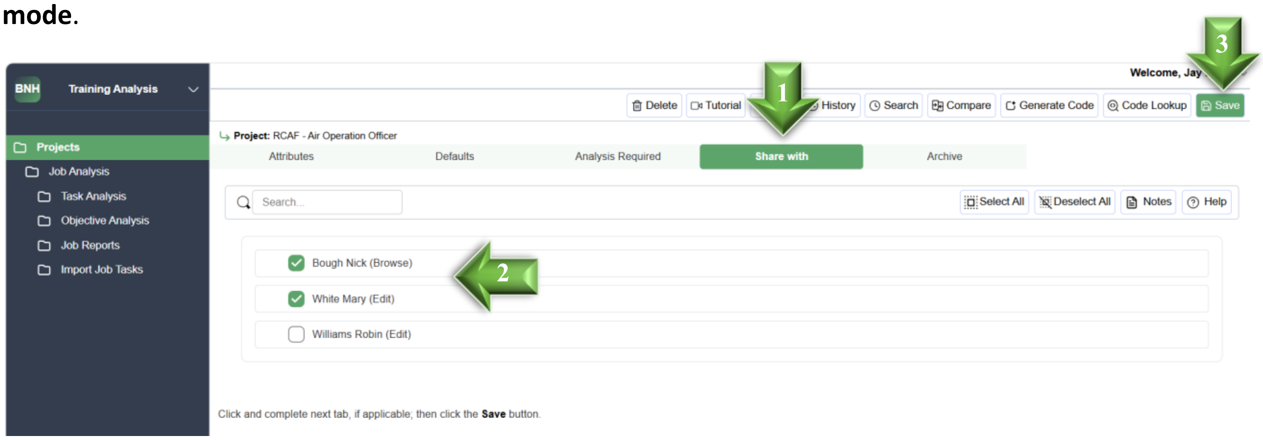
Control Data Visibility and Reuse: By default, when a new Project, Mission, System, Job, or Task is created, its **Status** is set to **Public**. This allows other users to find, copy, and reuse the item through the Search function – helping minimize duplication and streamline analysis efforts. Setting an item to **Public** does not grant others permission to view or edit your data. It simply enables reuse of the structure or content. To maintain anonymity or restrict visibility, you can set the **Status** of a Project, Mission, System, Job, or Task to **Private**. Private items are excluded from the **Search** function and remain accessible only to you.



Manage Collaboration and User Access: Each analysis – such as a Project, Course, or similar item – is assigned to a specific User (Manager), typically the individual who created it. By default, only the Manager can view and modify the Project or Course. To allow other users to review or make changes, the Project or Course can be shared by clicking the [**Share with**] tab, placing checkmarks next to their names, and clicking [**Save**]. The privilege level for each user is displayed beside their name. **Browse** – the user can view the analysis and add notes but cannot edit. **Edit** – the user can add, modify, or delete items. Note: Only the names of users assigned to the same Client are presented under the [Share with] tab.

If the Project or Course Manager reports to another user, the Project or Course is automatically shared with that Supervisor. In this case, the checkmark next to the Supervisor's name appears in **read-only mode**.



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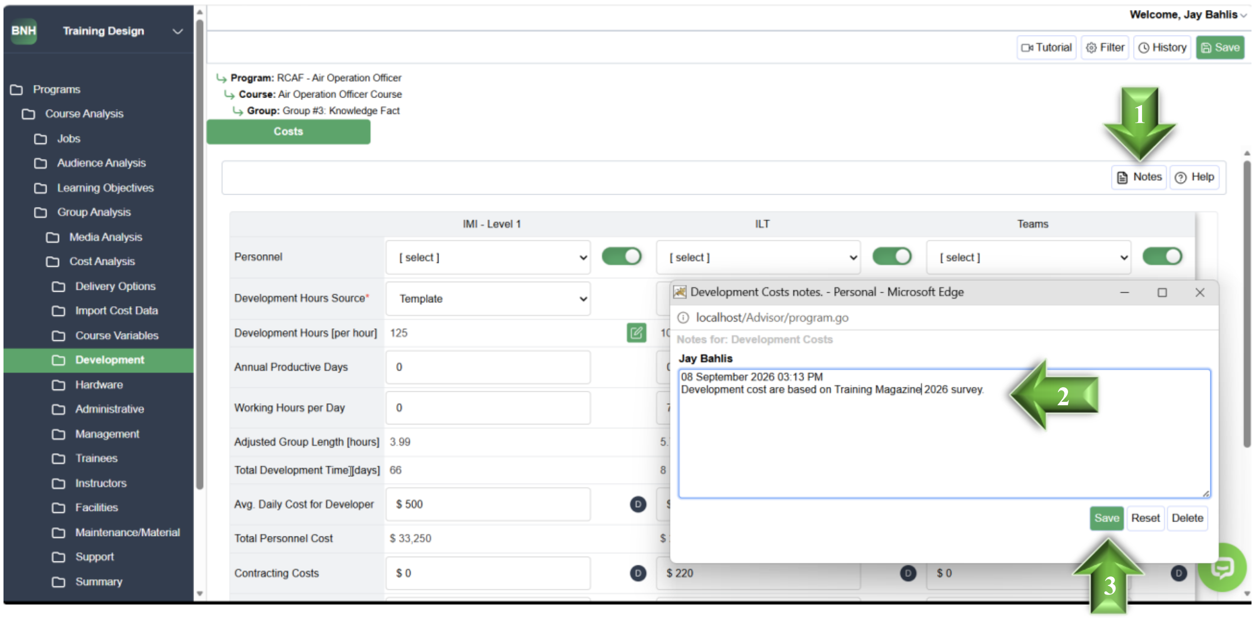
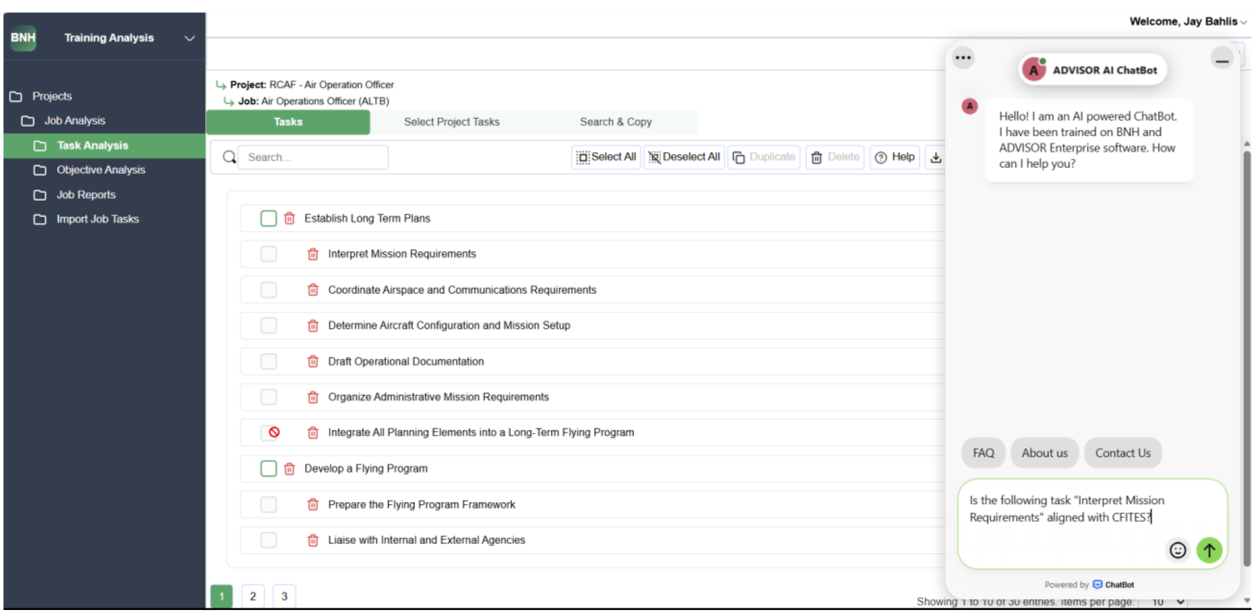
Add Notes: Users can add a Note to any screen by clicking [**Notes**], typing the note in the new window, and clicking [**Save**]. Notes added by other users are displayed in read-only mode at the bottom of the window. Each user can edit or delete only their own notes.



AI Enhanced User Support: ADVISOR built-in AI chatbot supports both platform questions and Instructional Design guidance. Whether you need best practices or quick answers, help is always a click away.



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Chapter 2: Setup Clients

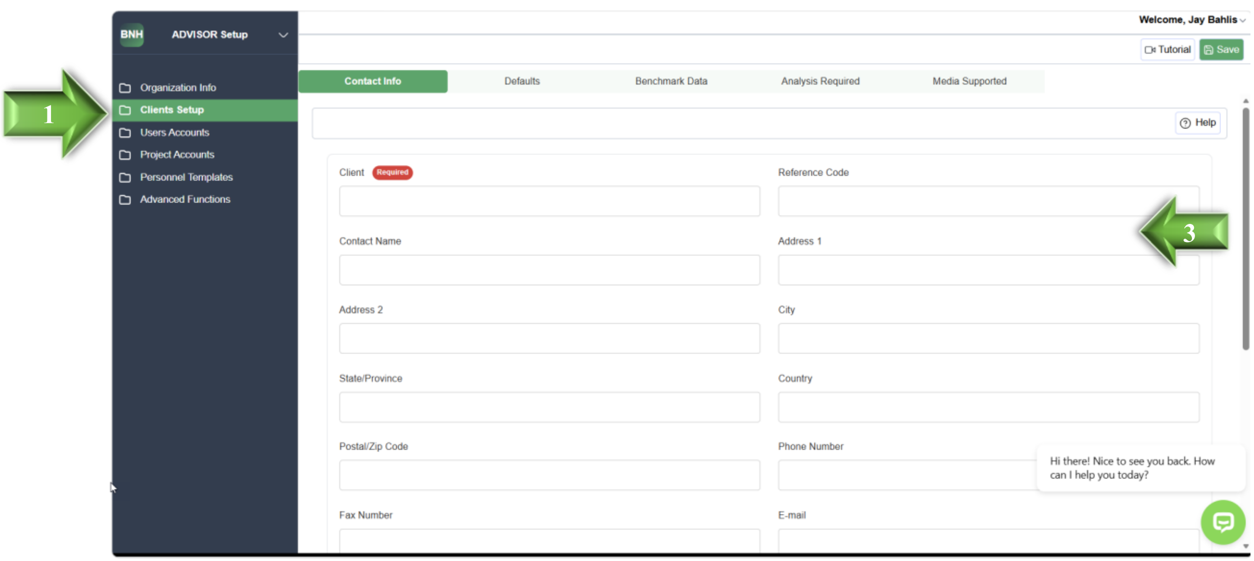
2.1 Setup New Client

Why Setup Clients. Although most instructional design models follow the ADDIE framework, organizations often adapt the process to fit their specific needs. Some prefer a task-based approach, while others use a competency-based model. Certain teams capture knowledge and skill requirements during task analysis, while others do so during objective analysis. To support multiple clients with differing methodologies and requirements, each client can be set up as a separate entity and configured according to its preferred approach. If you support only one client (such as your own organization), then only a single client setup is required

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

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

Step 3: Input the Client, Contact Name and additional information. Fields marked (Required) indicate data needed by ADVISOR. You can provide more than the required fields – the more information you include, the stronger and more accurate the results.



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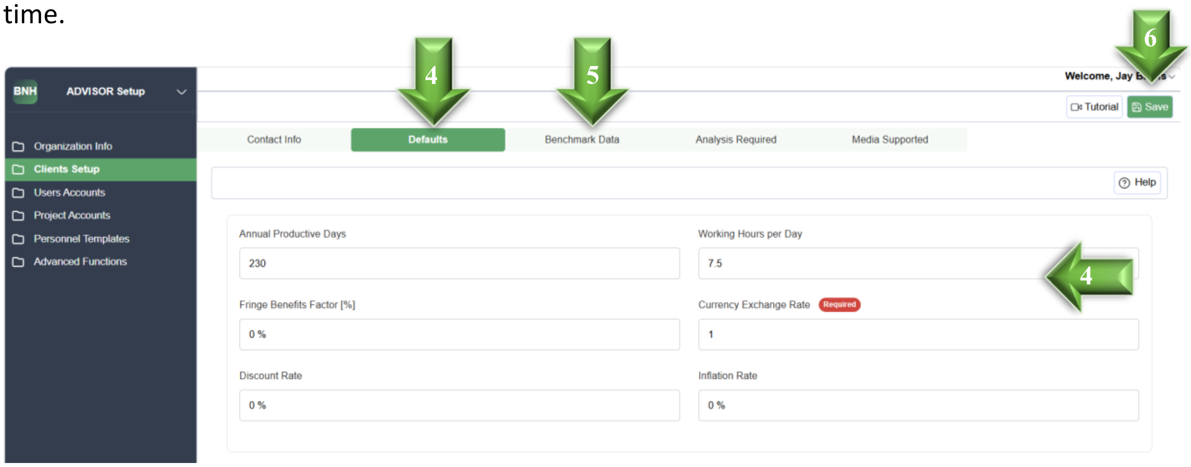
Step 4: Click the [**Defaults**] tab to specify Annual Productive Days, Working Hours per Day, Fringe Benefits Factor, as well as Currency Exchange, Discount, and Inflation Rates for the client.

Implication: Annual Productive Days, Working Hours per Day, and the Fringe Benefits Factor ensure consistent calculations and minimize repetitive data entry. These values automatically populate for all personnel types – trainees, instructors, administrators, managers, and support staff – whenever new courses or solutions are created. Users can still adjust them as needed. Discount and Inflation Rates play an important role in projecting courses and solutions costs over time.



Step 5: Click the [**Benchmark Data**] tab to specify the number of Employees Eligible for Training, the organization's Annual Payroll, how many Employees are Trained each year, the number of Trainers, and the Annual Training Hours per Employee.

Implication: The information you enter here is mainly used to produce ATD-equivalent benchmark reports.

Step 6: Click [**Save**] to store the data.

Note:

- To copy a Client, click to the **Clients Setup** folder, select the Client by placing a checkmark beside its name, and then click [**Duplicate**].

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2.2 Configure Client – Analysis Required

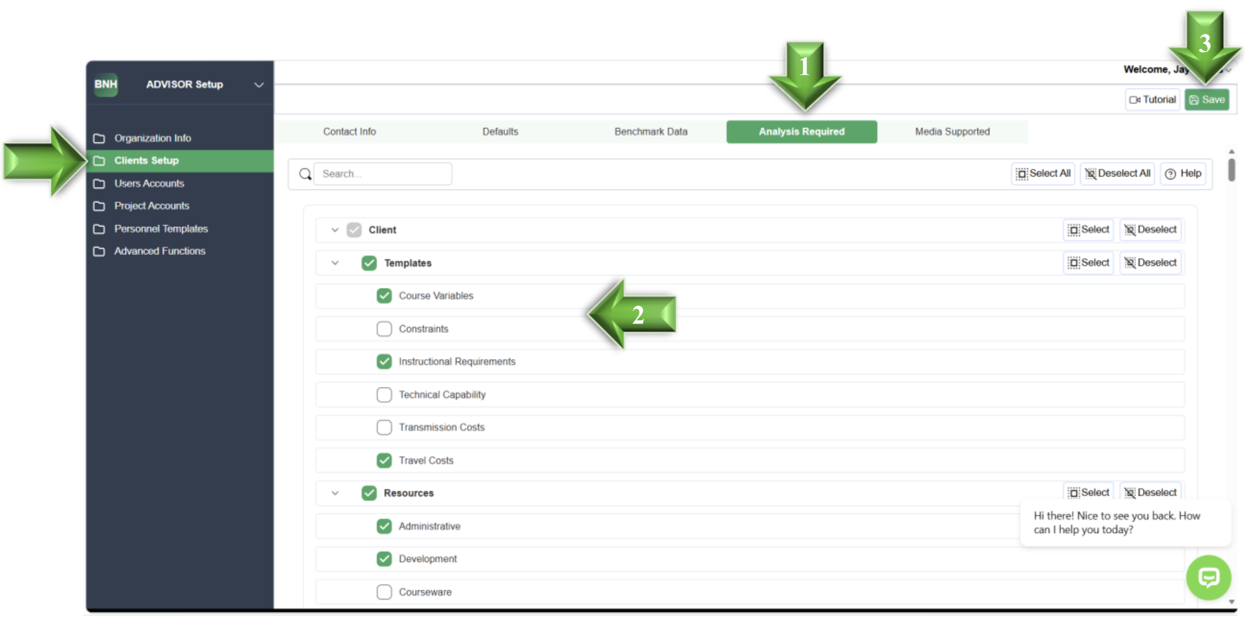
Step 1: Click the [**Analysis Required**] tab to define what data will be collected and which analyses need to be performed

Step 2: Select or deselect the items you want ADVISOR to include.

All options start selected by default. If certain data or analyses are not relevant for a Client, you can deselect them. ADVISOR will then hide the related nodes throughout all projects for that Client, helping simplify the workflow and reduce unnecessary data entry.

Example: If a Client only wants to consider Development, Hardware, Administrative, Management, Trainee, Instructor, Facilities, and Support Costs, deselect the remaining cost categories. You can always bring them back later by reselecting the items and clicking [**Save**].

Implication: Any deselected items will be hidden across all projects, courses, and solutions for that Client. This results in a cleaner interface and faster analysis. Because these settings apply globally to the Client, it's important to review them thoughtfully.



Step 3: When you're finished updating the settings, click [**Save**] to apply the Client's configuration.

<u>Note:</u> If needed, you can adjust the configuration for a single project, course, or solution. Simply turn off the **Cascade** option, then open the [**Analysis Required**] tab and select or clear the items you want to apply to that specific project, course or solution.

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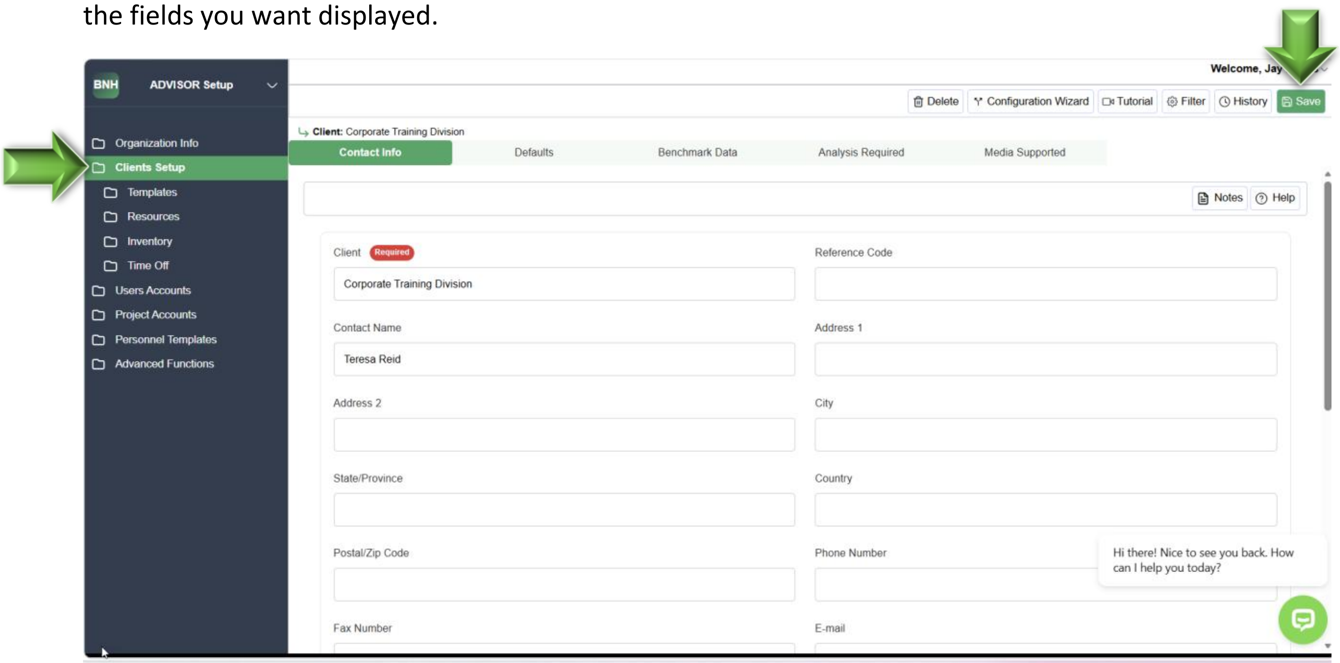
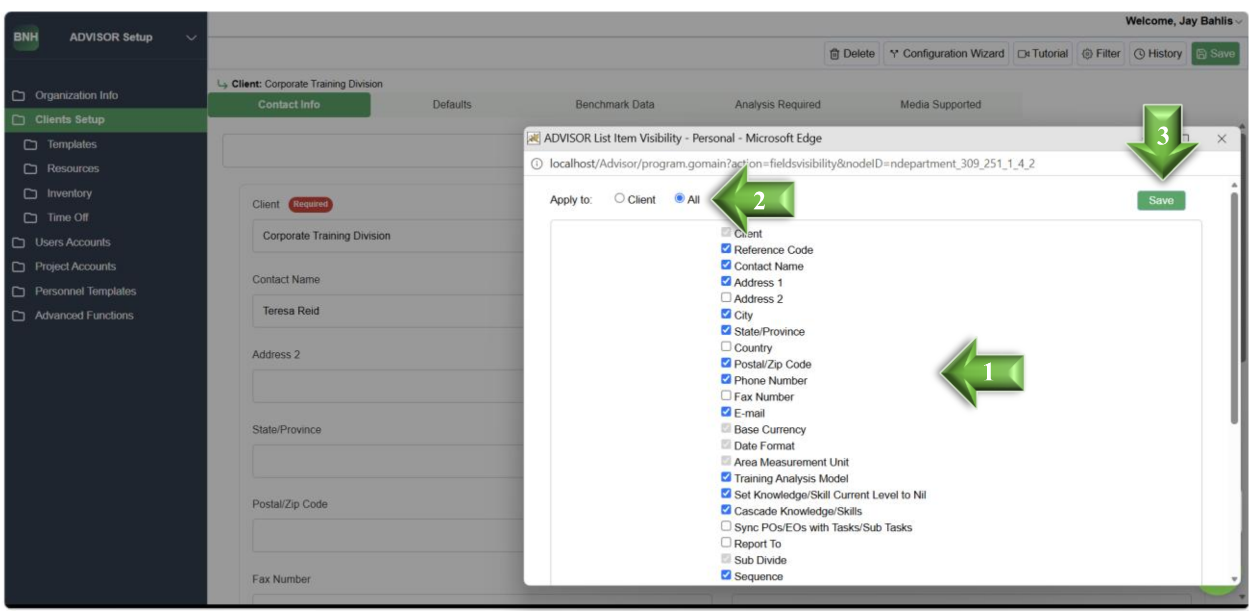
2.3 Configure Client – Fields Required

To tailor the analysis even more, you can hide or reveal fields on any screen. Just click [**Filter**] and select the fields you want displayed.



Select or clear the options for the fields you want to hide or show. Indicate whether the change should apply to **All**, a specific **Client**, or the **Current Project**, and click [**Save**] to apply the update.



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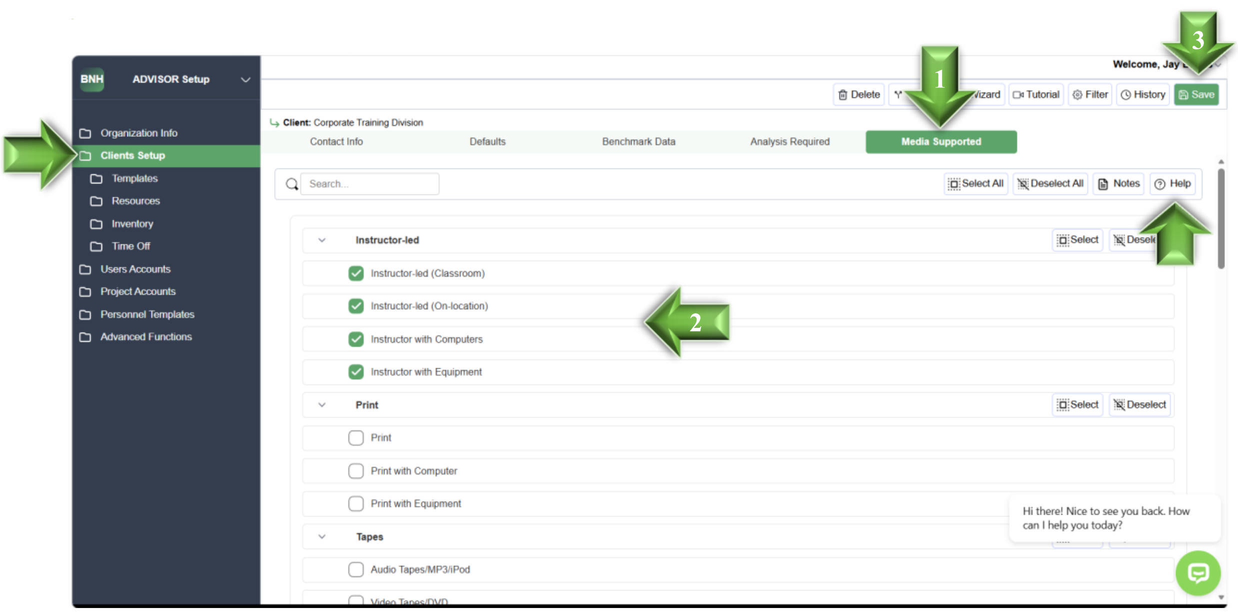
2.4 Configure Client – Delivery Options Supported

Step 1: Click the [**Media Supported**] tab to indicate which delivery methods are supported for this Client.

Step 2: Select the Delivery Options that apply to the Client by placing checkmarks beside the relevant items.

All options are selected by default. If you need more information about a specific Delivery Option, click [**Help**] for a short description, or refer to *Annex A* in the ADVISOR Enterprise **Training Design User Guide** for detailed explanations.

Implication: ADVISOR will only consider the selected Delivery Options when analyzing Courses for this Client. Unsupported options - such as Print in the example – will not be recommended and all related fields will be hidden automatically. This keeps the interface focused and reduces the time required to complete the analysis. Since these selections influence every Course associated with the Client, review them thoughtfully.



Step 3: When you've finished selecting the delivery options, click [**Save**] to apply them to the Client's analysis.

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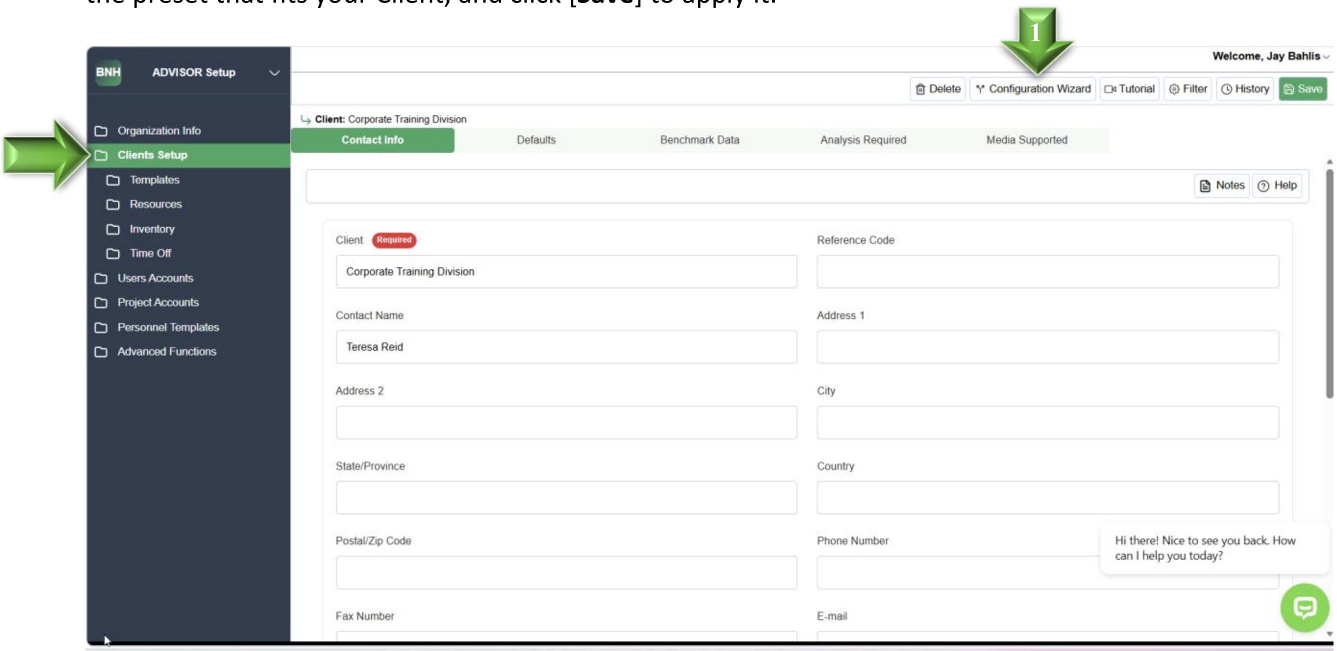
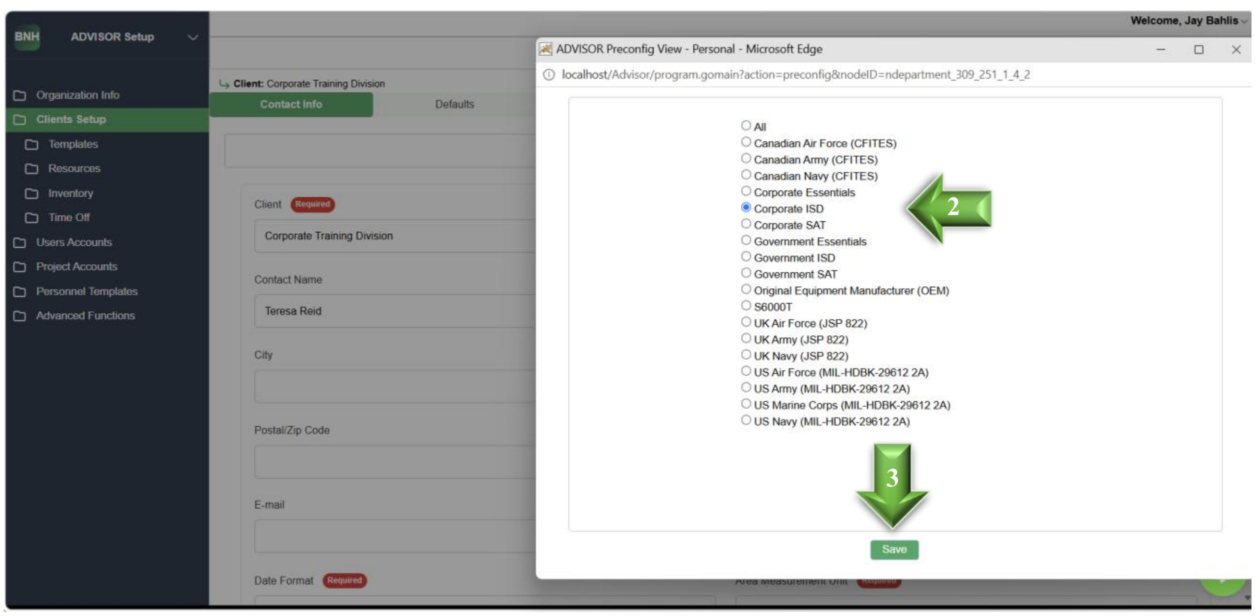
2.5 Configuration Wizard

To make configuration easier, ADVISOR includes 19 preset options that match the requirements of the Canadian Air Force, Army, and Navy; the US Air Force, Army, Navy, and Marine Corps; the UK Ministry of Defence; S6000T and several Corporate and Government standards. Click [**Configuration Wizard**], choose the preset that fits your Client, and click [**Save**] to apply it.





Beyond configuring the currency, DIF model, and related parameters, ADVISOR automatically hides any nodes, folders, fields, or reports that do not apply to the Client. You can continue tailoring the setup using the **Analysis Required**, **Filter Fields**, and **Media Supported** options outlined earlier. If you need a more specialized setup, BNH can create custom configurations to match your exact needs.

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2.6 Select Taxonomy

Different organizations use different terminology. For instance, the Canadian Department of National Defence refers to Learning Objectives as Teaching Points, while the UK Ministry of Defence uses Key Learning Points. To update the taxonomy, simply modify the relevant settings as follows:

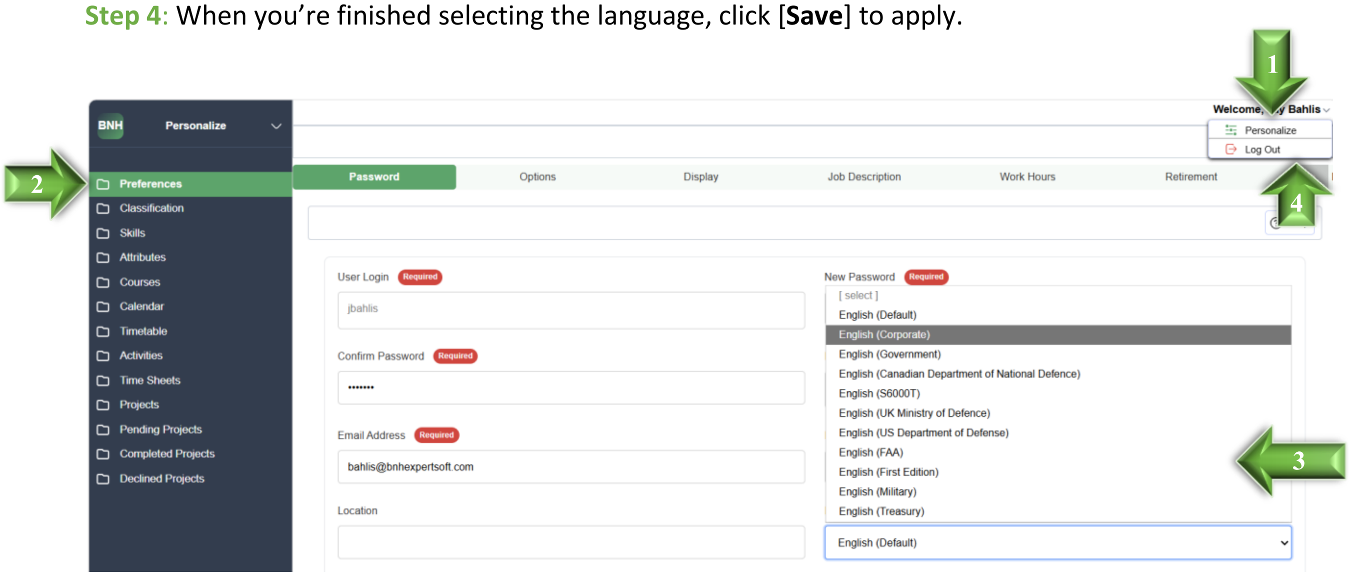
Step 1: Click on [**Personalize**]

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

Step 3: Choose the appropriate option from the **Language** field. ADVISOR provides six preset taxonomies – Corporate, Government, Canadian Department of National Defence, S6000T, UK Ministry of Defence, and US Department of Defense—alongside the default setting.

If you need a customized taxonomy, you can edit or create your own under **English (version 1)** and **English (version 2)**. More information is available in *Section 2.7 Modify Taxonomy*.

Step 4: When you're finished selecting the language, click [**Save**] to apply.



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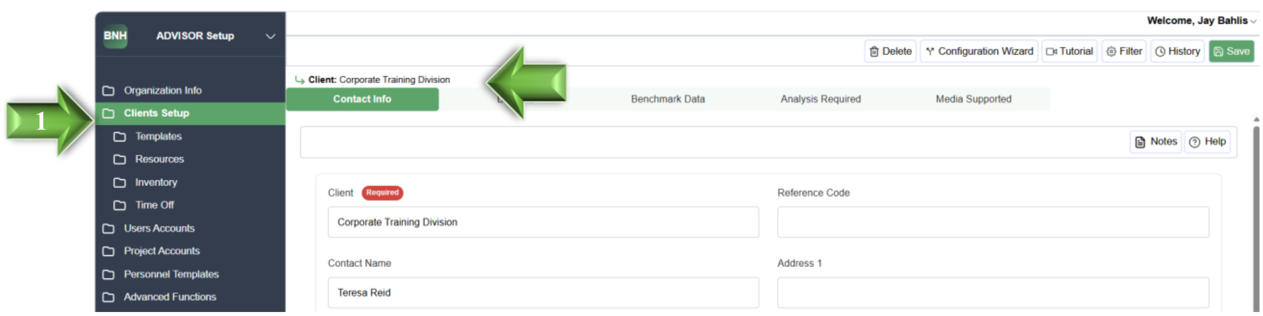
Chapter 3: Setup Templates & Resources

3.1 Setup Templates & Resources

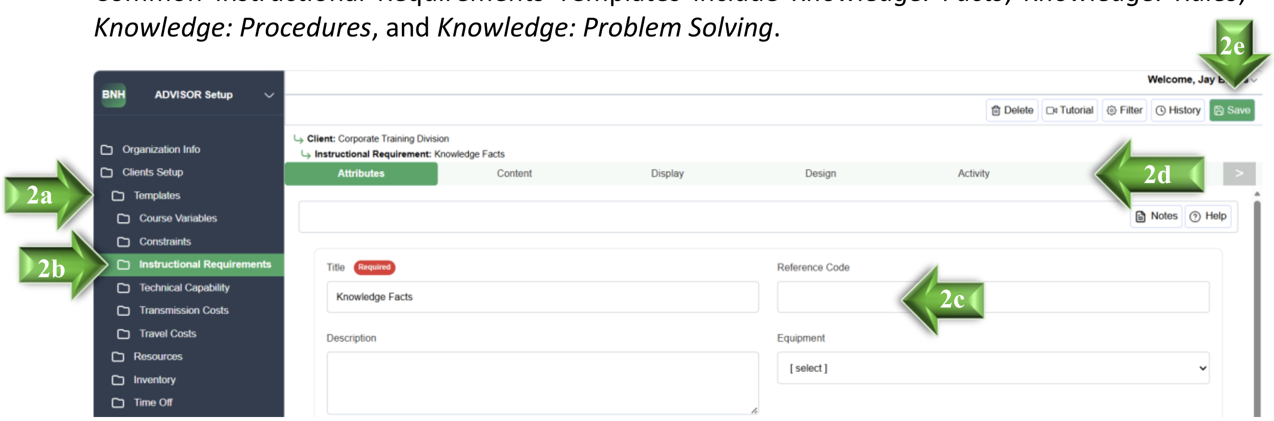
To make course analysis faster, more consistent, and more accurate, ADVISOR enables you to create and share personnel, resources, and instructional design templates. This also helps determine the personnel and resources needed for training and supports tracking their allocation and utilization across the organization

Step 1a: To configure course variables such as trainee-to-instructor ratios, instructor prep time, instructional design needs, technical capabilities, and transmission or travel costs, click on the **Templates** folder

Step 1b: To create personnel – developers, instructors, administrators, managers, support staff – or to add resources like facilities, equipment, or simulators, click on the **Resources** folder.



Step 2: To create a new Template or Resource, click the appropriate folder under **Templates** or **Resources**, then click [**Add**]. For example, to build an Instructional Requirements Template for Knowledge, select the **Instructional Requirements** folder, click [**Add**], complete all required fields across each tab, and click [**Save**]. You can add as many Templates or Resources as your analysis requires. Common Instructional Requirements Templates include *Knowledge: Facts*, *Knowledge: Rules*, *Knowledge: Procedures*, and *Knowledge: Problem Solving*.



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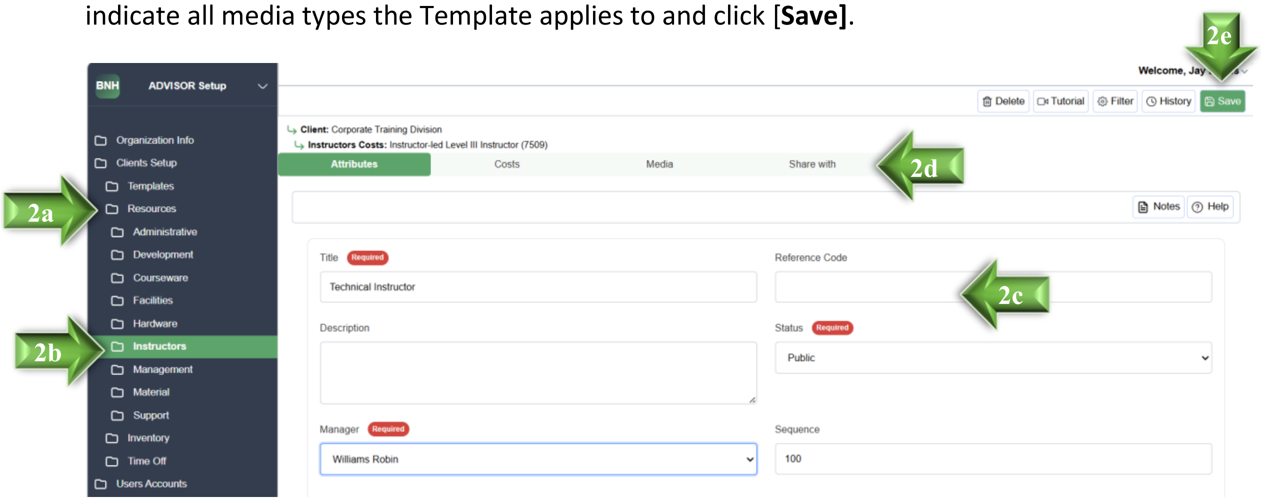
To configure pilot or technician instructors, click on the Instructors folder under Resources, click [**Add**], and complete the fields in the [**Attributes**] and [**Costs**] tabs. Then, under the [**Media**] tab, indicate all media types the Template applies to and click [**Save**].



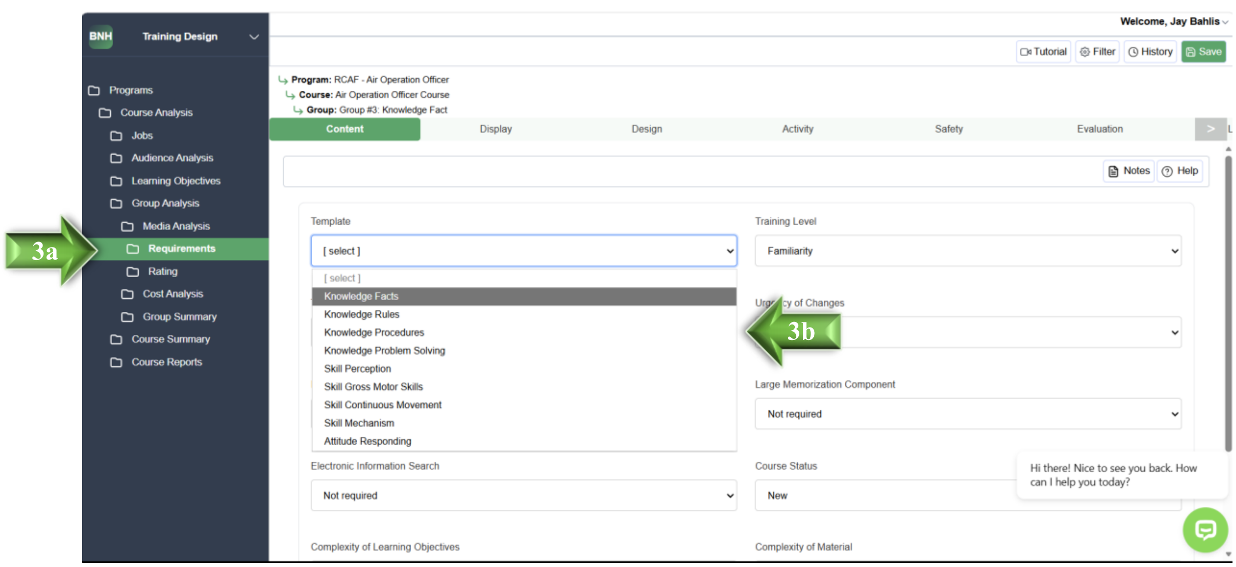
Notes:

➢ When a Template's **Status** is set to **Public**, any User assigned to that Client can use it in their courses. This does not mean they can edit it – only use it.

➢ You may also share Templates with specific Users assigned to the same Client. Open the [**Share with**] tab, check the appropriate names, and click [**Save**]. Users with the **Edit** privilege will be able to modify the Template.

➢ When available, you can place specific Equipment and Facilities in the Inventory folder. This helps streamline how resources are allocated to projects and course schedules.

Step 3: After you create an Instructional Requirements Template, authorized Users can quickly import it into any course by opening the Media Analysis folder and selecting the Requirements node.



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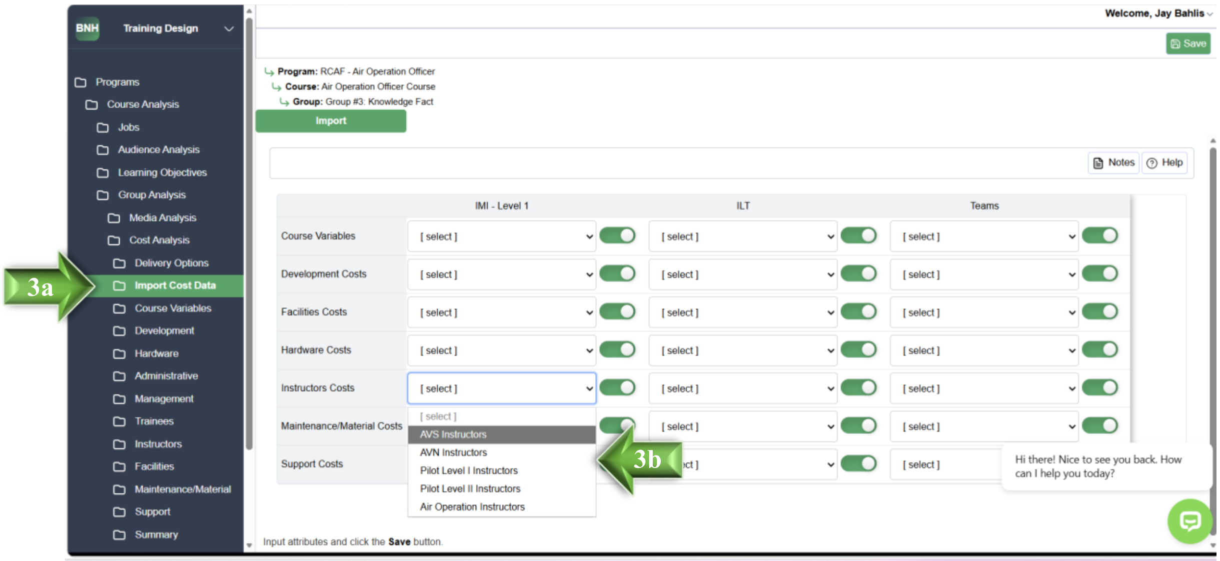
In the same way, authorized Users can import Personnel and Resources Templates into any course by opening the **Cost Analysis** folder and selecting the **Import Cost Data** node.



Templates and Resources make it easy to run *what-if* scenarios. For instance, you can instantly compare personnel, resource, and cost requirements for trainee-to-instructor ratios such as 6:1, 12:1, or 18:1 by choosing the appropriate Template and clicking [**Save]**.

The **cascade** icon shows that information from the Template is being applied directly to the Course. For example, if equipment purchase or operating costs change, you only need to update the Template – any course using that Template will update automatically. You can turn cascading off or back on at any time by clicking the icon.

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3.2 Find & Copy Templates & Resources

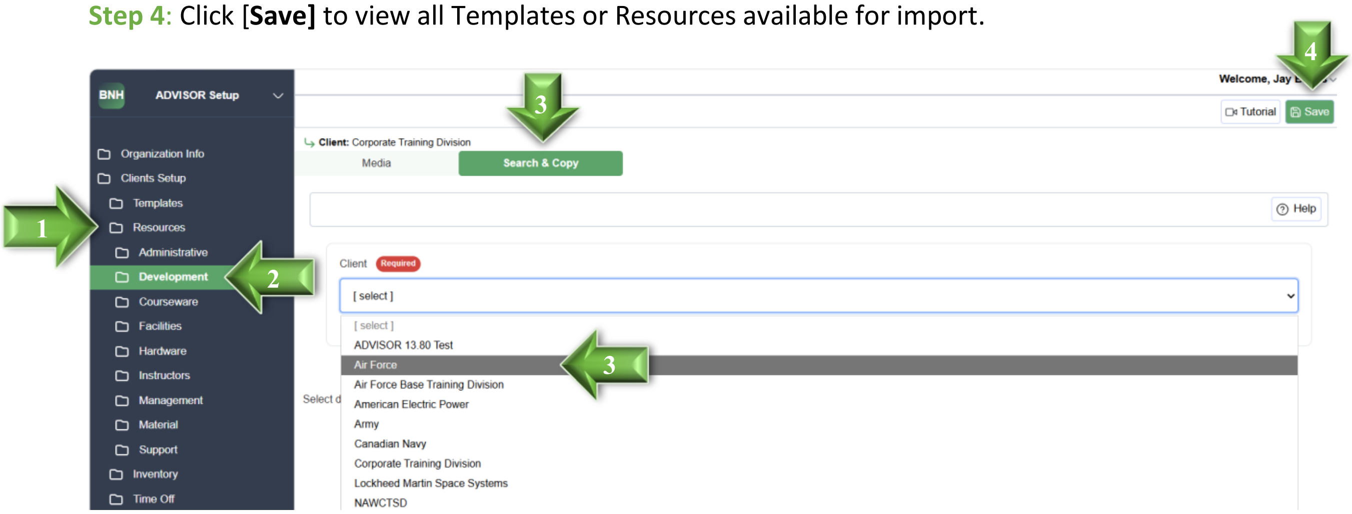
Copying Templates or Resources from another Client is simple:

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

Step 2: Click on the category you want to work with, such as Development.

Step 3: Click on the [**Search & Copy**] tab and select the Client whose Templates you want to copy.

Step 4: Click [**Save]** to view all Templates or Resources available for import.



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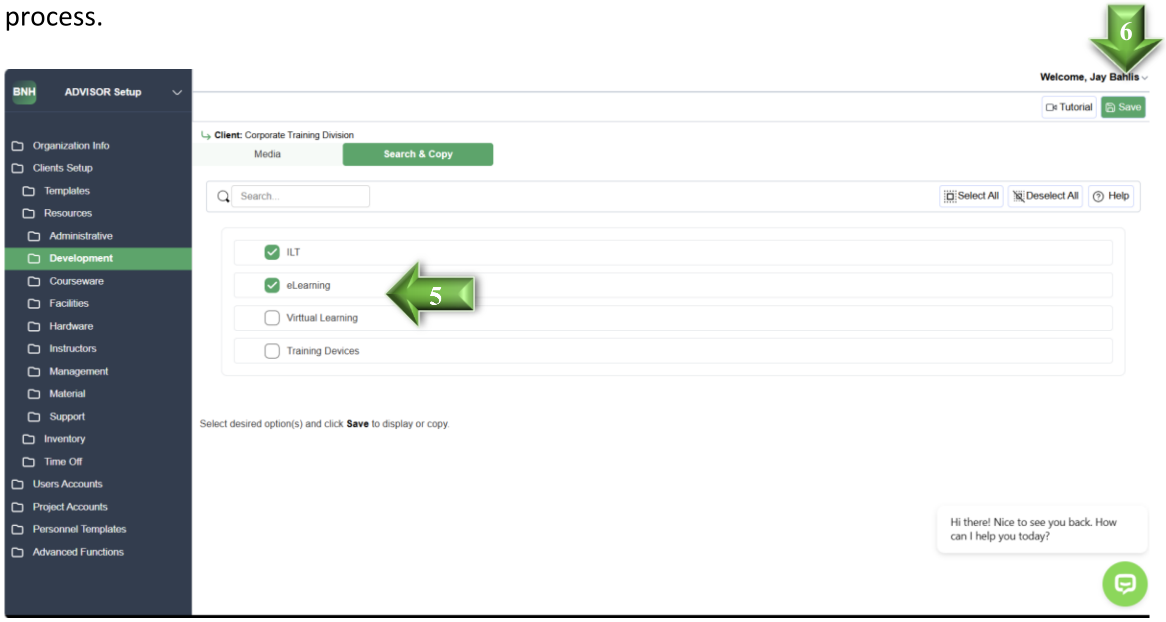
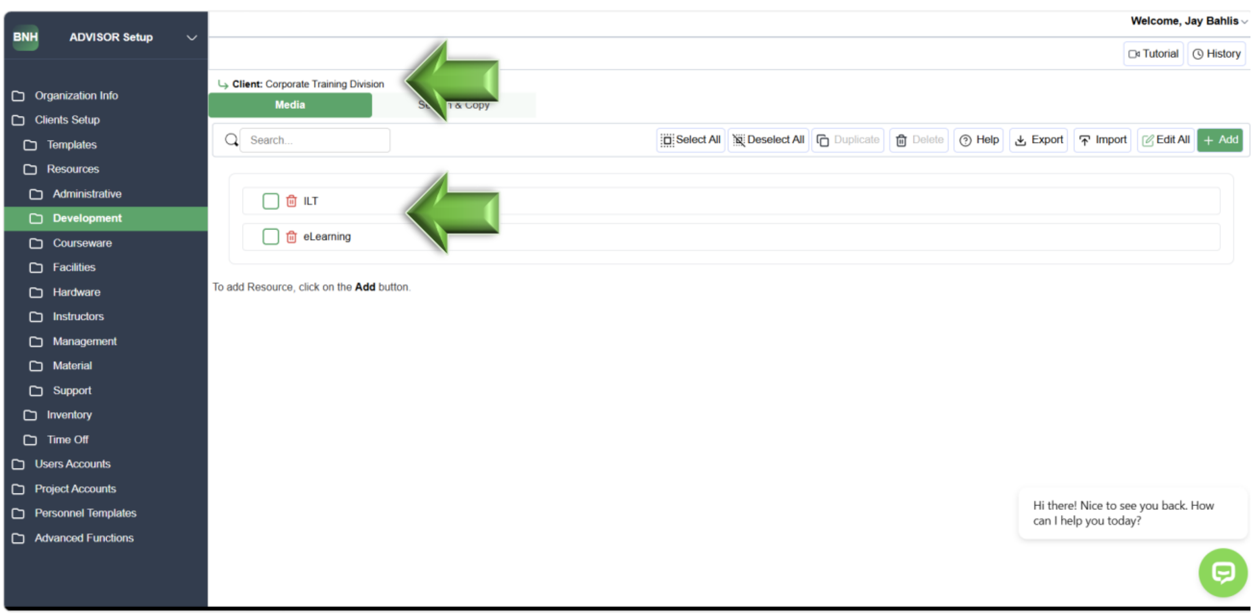
Step 5: Choose the Templates or Resources you want to copy from the list.

Step 6: After selecting the Templates or Resources you want to copy, click **[Save]** to complete the process.



After saving, the copied Templates will be added under the selected Client.



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Chapter 4: Setup User Accounts

4.1 Setup New User Accounts

Create User Accounts

Step 1: To create a new User account, click on the Users Accounts folder.

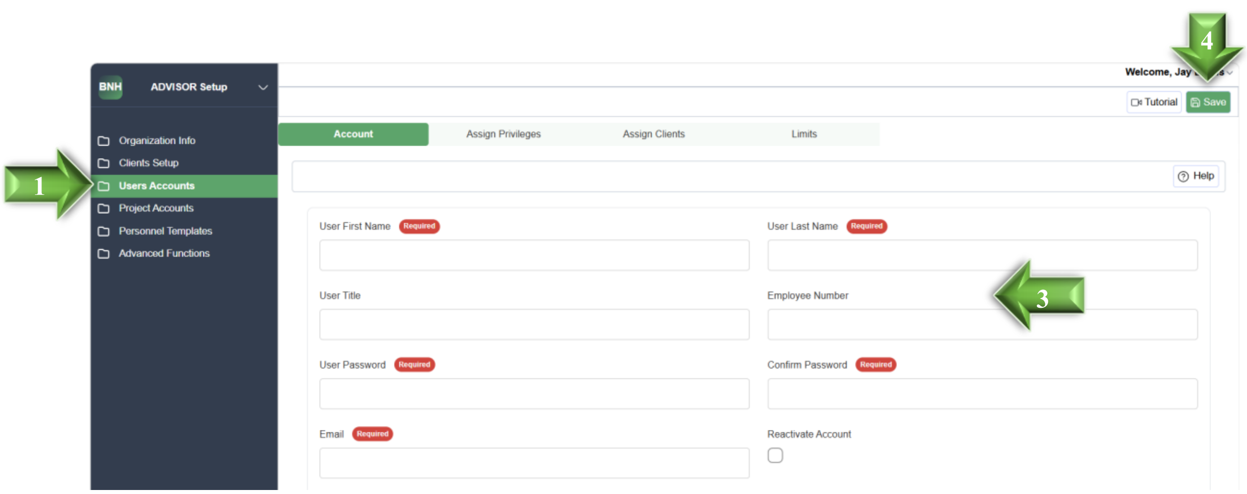
Step 2: Click on [**Add**] to begin setting up the new User.

Step 3: Under the [**Account]** tab, enter the User's first name, last name, title, password, and email. Next, assign the appropriate functions under the [**Assign Privileges**] tab, and indicate which Clients the User supports under [**Assign Clients**]. If needed, you can limit access by entering an expiry date under the [**Limits**] tab. If no date is entered, the User's access will end when the organization's annual ADVISOR license expires. More details on Privileges, Clients, and Limits are presented below.

When you click [**Save**], ADVISOR automatically generates the User Login using the first initial and last name. If that Login is already in use, ADVISOR adds a number to create a unique identifier.

Users can change their Login and Password by clicking on the [**Preferences**] node under [**Personalize**] once they are logged in. Fields marked (Required) indicate data needed by ADVISOR.

Step 4: When all required information has been entered, click [**Save**] to finalize the new User account.



Notes:

- If a User has not logged in for a period defined in the Configuration File, their account may be deactivated. To restore access, simply check **Reactivate Account** and click [**Save**].

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- Password rules – such as minimum length, required character types, how often passwords must be changed, and whether old passwords can be reused – can all be set by System Administrators in the *advisor.properties* file.

Assign Privileges

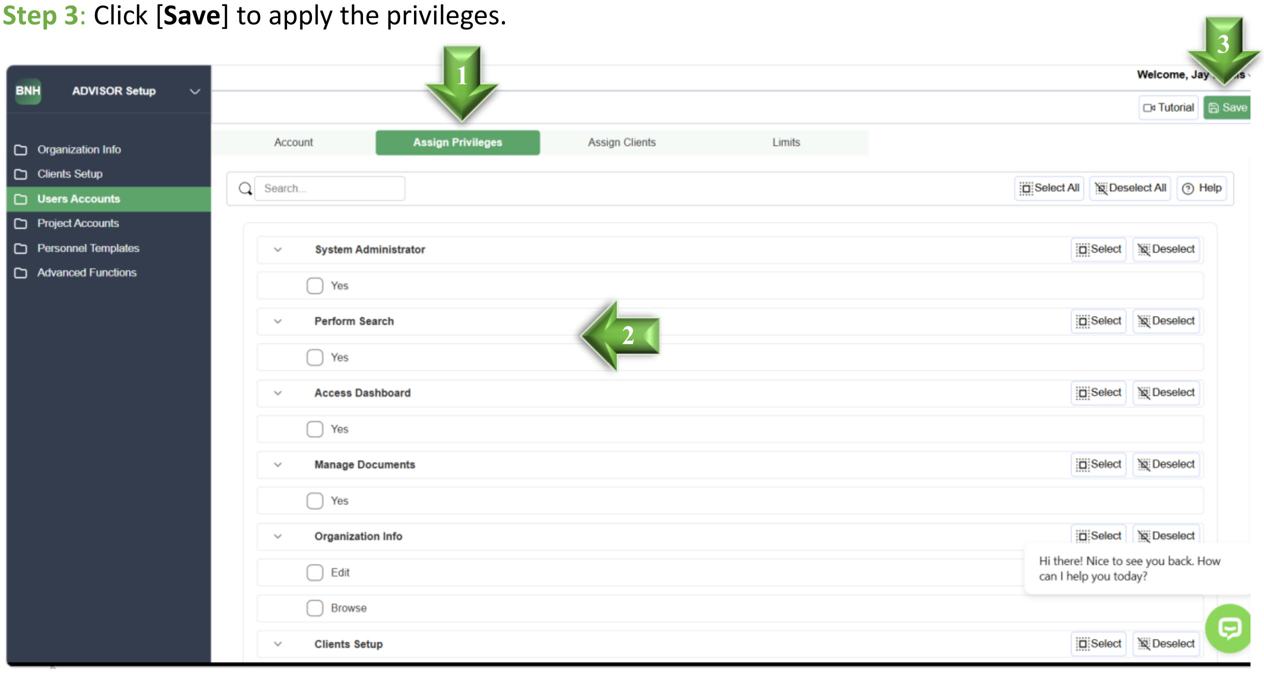
To define what the User can or cannot do:

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

Step 2: Check the boxes next to the functions you want the User to access. New Users start with no privileges, while the **System Administrator** role provides complete access. You can view short descriptions of each function by clicking [**Help**], and a printed version is available in *Annex A*.

Implication: A User with **Browse** privileges can view information but cannot change it. A User with **Edit** privileges can add, update, or delete data. If a User has no privileges for a specific function, such as Organization Info, ADVISOR hides that node entirely.

Step 3: Click [**Save**] to apply the privileges.



Notes:

- Privileges help organizations manage work more efficiently. For instance, if a Financial Analyst is given **Browse Clients Setup** and **Edit Financial Templates**, they can create Cost Templates for Clients but cannot modify or add new Clients. That task can be assigned to someone else or reserved for the System Administrator.

- Privileges also make ADVISOR easier to use by showing each User only the functions they need, keeping the interface clean and focused.

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Assign User to Clients

Step 1: Click on [**Assign Clients**] tab and check the boxes next to the Client(s) the User will support. New Users start with no Client assignments

Implication: Users can collaborate and share analyses only with colleagues who support the same Client. Their privileges also apply strictly within those assigned Clients. For example, if George Smith is assigned to the **Army** and has permission to manage financial templates, he can manage templates for the Army only.

Step 2: Click [**Save**] to complete the Client assignment.

Limit User's Storage/Access

Under the [**Limits**] tab, you can apply several restrictions to a User's account.

Number of Courses	This option controls how many courses a User can keep saved at once. It doesn't restrict how many analyses they can perform – only how many completed analyses can be stored at the same time. For instance, if John Smith has a limit of **5 courses**, he can analyze any number of courses, but only **five** can remain saved. When he reaches the limit, he can delete one course to make room for another. If no limit is set for the User, the organization's overall course license determines how many courses all Users can collectively manage.
Expiry Date	If you need to grant temporary access – for example, to a partner or consultant – enter an **expiry date** for the User's account. Once that date is reached, the User will be unable to log in. If you leave the expiry date blank, the User's access will end when the organization's annual ADVISOR license expires.

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