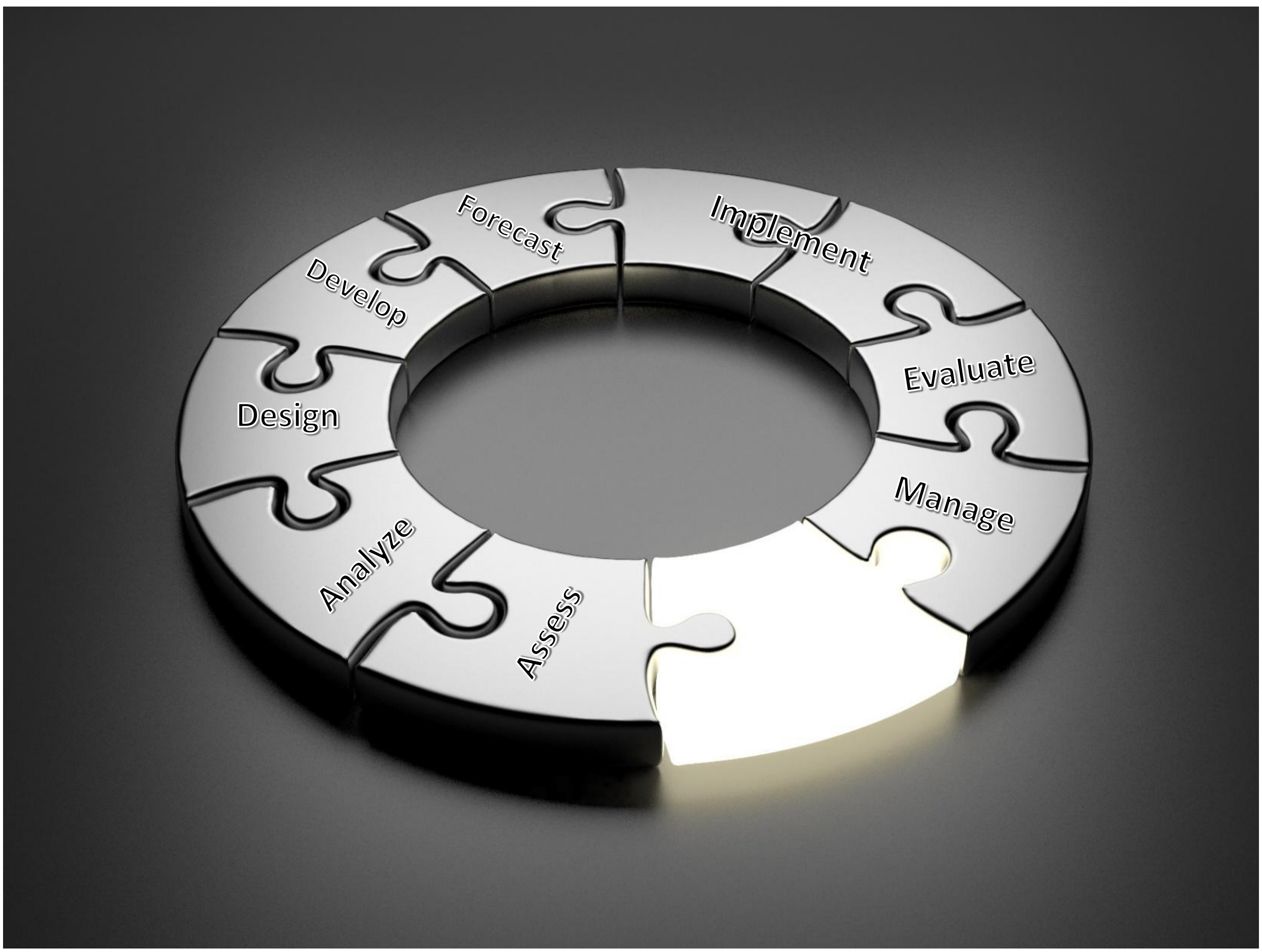
ADVISOR ENTERPRISE

Plan better... Achieve more!

# Configuration 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**

**M**anage. 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**

**A**ssess: 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**

**A**nalysis: 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**

**D**esign: 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].

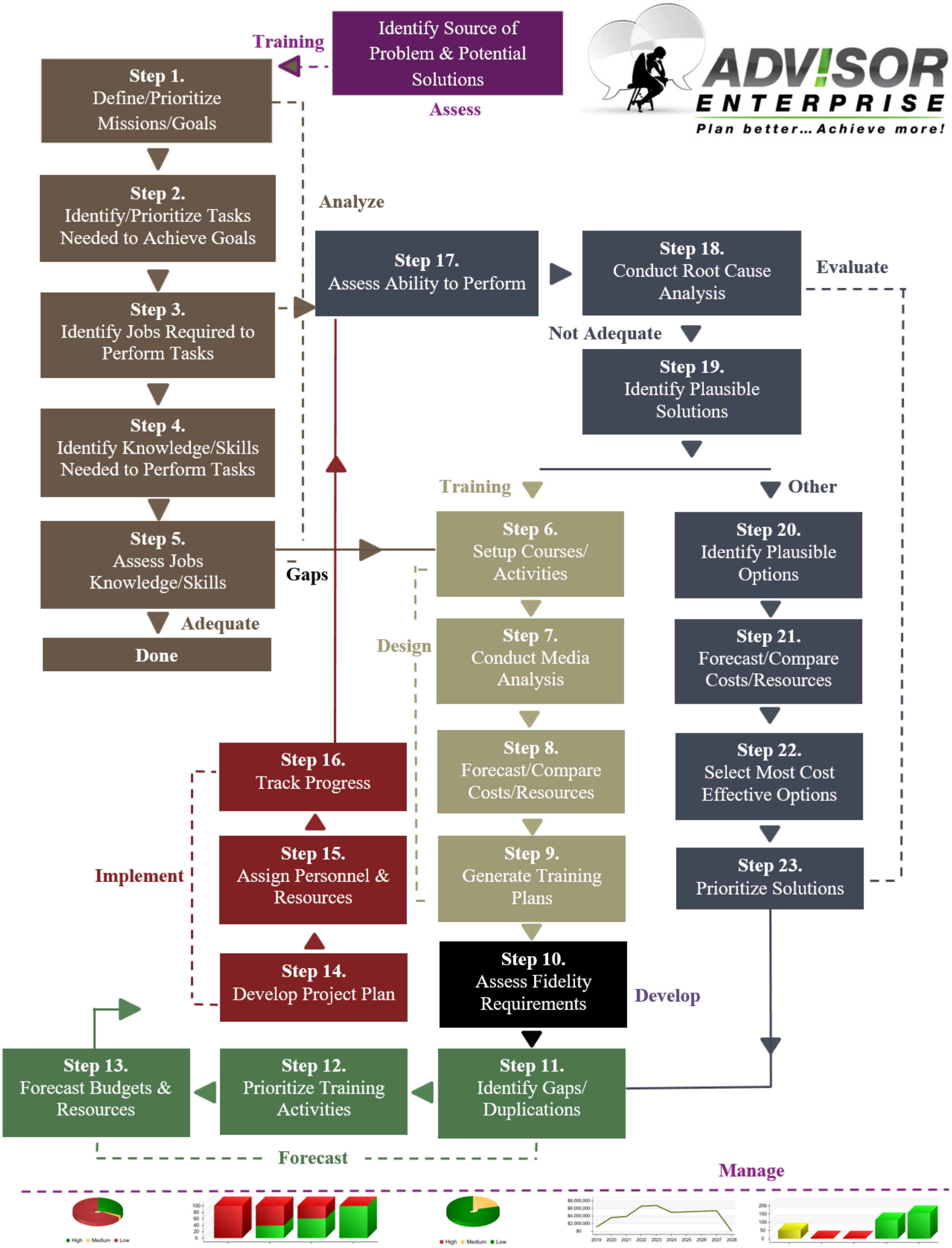
**Fidelity Analysis**

**D**evelop: 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**

**I**mplementation: 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].

| | |
|---|---|
| **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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# Approach

Why is ADVISOR Enterprise so effective? Because it focuses on operational requirements – i.e., identifies the knowledge, skills and competencies needed by each job, position and employee to attain organizational missions/goals, as well as the most efficient way to achieve. In addition, facts support the decision-making process, helping you create consensus to stay the course.

Using our proprietary methodology, your efforts unfold in four phases, as follows:

**Discover**

- Define Missions/Goals.
- Identify Tasks needed by each Job/Position/Employee to attain missions/goals.
- Identify Training requirements.
- Outline current Training Courses/Activities.
- Find out where money and resources are allocated.

**Strategize**

- Map Training Courses/Activities to Operational Requirements to identify gaps, duplications and unwarranted training.
- Assesss alternate venues for the delivery of training.
- Uncover resource allocation.
- Uncover cost drivers.

**Prioritize**

- Prioritize Training Courses/Activities - from highest to lowest impact on missions/goals.
- Prioritize recommended changes to current delivery options.
- Identify personnel/resources excess capabilities and bottlenecks.
- Identify strategies for mitigating high cost items.

**Optimize**

- Develop an implementation strategy starting with low risk, low cost, high impact options.
- Align personnel/resources with new strategy.
- Develop project plans and monitor progress.
- Assess and validate results.

# ADVISOR Simplifies and Speeds Training Needs Analysis

## Speed Data Collection

Collect data from Subject Matter Experts offline through custom-built Excel spreadsheets and upload to ADVISOR in few mouse clicks. Exchange data with other systems through xml.

## Facilitate Data Sharing, Reusability & Management

Store all data in a centralized database accessible anytime and from anywhere by all team members with only a Browser.

Track changes made by each team member and preserve multiple versions of each analysis.

Simplify data manipulation through a drag and drop like interface that preserves existing links.

Minimize duplication by storing Tasks, Knowledge and Skills in easy to access searchable repositories.

Facilitate the reusability of Missions, Systems, Jobs, Tasks, Objectives and so forth through Search functions to quickly locate and copy desired elements.

Facilitate the merging of similar records (Learning Objectives, for example) while preserving links.

Generate audit trail with one click to track where each requirement has been addressed and gaps.

## Preserve Training Integrity

Quickly identify Jobs, Tasks, Courses, Activities, Lessons and Objectives that could be impacted by a change to mission, system, reference or policy.

## Facilitate Budget/Personnel/Resource Management

Forecast training budget, personnel and resource requirements for multiple courses/activities for any time period in minutes.

## Speed Data Analysis

Identify and Prioritize Training Requirements of each Task based Difficulty, Importance and Frequency (DIF); and present reasoning behind recommendations.

Minimize the number of media analyses to be performed without compromising integrity, by grouping Learning Objectives with similar characteristics based on Bloom's Taxonomy and analyzing as a single entity.

**Media Analysis:** Quickly identify viable delivery options for each Learning Objective by mapping instructional requirements to the capability of each media. Reasons for eliminating or reducing rating of a delivery option are automatically presented.

**Cost Analysis:** Store common measures such as hourly rates of developers, instructors and support staff; per diem and travel costs; start-up and operating costs of equipment, simulators, facilities, etc., in Templates to quickly forecast and compare budget, personnel and resources requirements of viable delivery options over training program life cycle.

**Performance Analysis:** Quickly zero in on the root cause of a performance deficiency by considering crew and supervisors' feedback, tools, policies and work environment to identify viable solutions (including training, job aids, policies, tools, etc.) that can yield the desired level of productivity.

## Speed Report Generation

Generate over eighty (80) types of reports including Master Task List, Master Training Task List, Media and Objective Report, Cost and Resource Analysis Report, Training Plans, etc., to support corporate, government and various military organizations.

**ADVISOR cuts time needed to conduct TSRAs from 18 months to 6 months.**
*Jeffrey Hogan, Lead TSRA Analyst, USfalcon*

**Changes to Lesson Design Report that could have taken days to complete can now be generated within 20 minutes.**
*Jack Wierengo, Database Administrator, Boeing*

# ADVISOR Drives Training Efficiency

### Minimize Training Duplication

Map training courses/activities to operational requirements to identify and highlight courses/ activities that address the same requirement. In other words, duplicate training activities.

### Reveal Training Creep

Map training courses/activities to operational requirements to identify and highlight courses/ activities that do not address an operational requirement. In other words, training activities that are no longer relevant.

### Identify Training Gaps

Map training courses/activities to operational requirements to identify operational requirements that are not being addressed. In other words, training gaps.

### Uncover Cost Drivers

Forecast budget, personnel and resource requirements over training program life cycle to uncover cost drivers. In other words, where budget, personnel and resources are allocated.

### Generate Project Plans

Minimize delays and cost overruns by producing solid project plans, tracking progress in real-time, anticipating problems and pinpointing corrective measures.

### Leverage Training Technology

Quickly forecast and compare the costs of viable delivery options to identify optimal solution; and conduct what if scenarios in minutes to assess the impact of blended delivery, build versus buy, use of internal versus external personnel, and so forth.

### Improve Resource Allocation

Track personnel/resources utilization rates over any time period to identify excess capabilities and bottlenecks.

### Improve Performance

Maximize training impact by uncovering the root cause of a performance deficiency and focusing resources on the most critical initiatives.

## Proven Track Record

ADVISOR supports multiple military standards including US MIL-HDBK-29612, Canadian (CFITES) and UK JSP 822, is highly configurable and customizable, and has been successfully implemented in several projects including:

- Joint Strike Fighter (JSF)
- US Army Training Enterprise Integration
- US Army Blackhawk (BH)
- US Aircrew Training & Rehearsal Support
- Air Force Space Command Joint Mission System
- US Navy Poseidon (P-8A)
- Marine Corps Blackhawk (CH-53K)
- Marine Corps Small Unmanned Aircraft System
- UK Military Flying Training System (MFTS)
- UK Defence Training Review (DTR)
- Canadian Tactical Airlift Project (C130J)
- Canadian Officer Development Program
- Airworthiness Training Needs Assessment
- Operational Training System Provider (OTSP)
- Air Technician Training Renewal (ATTR)
- Army Land Vehicle Crew Training
- Canadian Navy Arctic Offshore Patrol Ship (AOPS)
- Canadian Coast Guard Polar Ice Breaker
- Republic of Singapore Basic Wing Course (BWC)
- Republic of Singapore Unmanned Aerial Vehicle

**ADVISOR "… determines the most effective and efficient media for a given situation."**
*Canadian Forces CFITES*

**ADVISOR is "… the preferred decision support tool" for UK MoD.**
*Joint Service Publication (JSP) 822*

# Acknowledgement

ADVISOR Enterprise is the result of over twenty years of research and development. Dozens of organizations and hundreds of individuals have contributed to the development and evolution of ADVISOR and for this we are very appreciative. Our primary objective is to develop a practical, reliable and robust tool that simplifies and speeds training analysis, forecasts and optimizes training resources, improves resource allocation, generates audit trail to support recommendations, facilitates collaboration and sharing of data among team members, minimizes duplication as well as facilitates the upkeep of analysis over time to keep training programs effective, efficient and relevant. We believe that with the assistance and contribution of the following organizations and individuals, we have been able to accomplish this goal.

- CAE
- Canadian National Defence
- Federal Deposit Insurance Agency
- Lockheed Martin
- National Security Agency
- Merck Company
- Nortel Networks
- Pearson TQ
- Raytheon Systems Company
- Southern Steel Company
- UK Ministry of Defence
- United States Air Force
- United States Army
- United States Coast Guard
- United States Marine Corps
- United States Navy

- Lisa Abramson – Merck & Company
- Larry Alberter – National Security Agency
- Cathi Billings – Sheppard AFB
- Ferrell Briggs – Naval Aviation Maintenance Training Group
- Tim Bothell – Franklin Covey Company
- Greg Campbell – Canadian National Defence
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Thank you.

J. Bahlis, Ph.D., P.Eng.
President
BNH Expert Software Inc.

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# Chapter 1: Getting Started

## 1.1 Introduction

Globalization, technology and demographics are affecting the way organizations are running their businesses, which in turn is having a significant impact on workplace learning and performance. Upon examining the statistics over a four-year period, Van Buren and Woodwell (2000) concluded that “success in today’s economy depends more than anything else on knowledge and learning” – a view shared by both senior executives as well as HRD professionals. The problem arises, however, in the way the results are measured. From senior executives’ perspective, training is a strategic investment that is expected to provide the organization with a competitive edge. HRD professionals, on the other hand, “often value people development for its own sake rather than something that should be linked to business strategy.”

ADVISOR Enterprise is a web-based Training Management System. It simplifies and speeds training needs analysis, forecasts and optimizes training resources, improves resource allocation and generates audit trail to support recommendations. This includes:

- Who needs to be trained on what and why
- What is the most effective and efficient training option
- What fidelity requirements are needed for training devices
- How much money and resources are needed
- How to keep projects on time and within budget
- Is training driving performance and additional interventions needed

As one can also appreciate, storing all analysis in a centralized database that can be accessed anytime and from anywhere with only a browser will greatly facilitate collaboration and sharing of data among team members, minimize duplication and facilitate the upkeep of analysis over time and in-turn to keep training programs effective, efficient and relevant.

In addition to reducing the analysis time, ADVISOR provides consistent and reliable results by utilizing common measures such as hourly rates of developers, instructors, support staff; average time needed to develop, manage and support courses; average per diem and travel costs; equipment operational costs; etc., to quickly and accurately forecast the money and resources needed for one or multiple training programs. With critical, up to date, concise and meaningful reports within easy reach, duplications and problem areas can be quickly identified, impact of changes can be readily assessed, plausible solutions investigated, and personnel/resources reallocated to continually drive efficiency.

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 How Can ADVISOR Help You?

1. **Centralized System of Record.** Replace spreadsheets and manual analysis with structured workflows, AI-powered insights, and full traceability from requirements to training solutions. Access your data anytime, anywhere through a browser, track changes made by each team member, find and reuse content instantly. Facilitate data collection from SMEs using Excel, and the exchange of data with other systems and ADVISOR platforms using xml.

2. **End to End Training Needs Analysis.** Built for mission, system, competency, and job-task analysis with structured workflows, and automated analysis. A guided, repeatable process ensures consistency, accuracy, and defensible analysis across teams and projects.

3. **Evidence Media Based and Cost Decisions.** Compare delivery options using proven instructional design logic. Forecast personnel, resource, and lifecycle costs in minutes - not weeks. Run what-if scenarios to optimize blends, class sizes, ratios, & delivery strategies. Back every decision and output by methodology, data lineage, & audit-ready traceability.

4. **Personnel & Resource Forecasting.** Plan instructors, equipment, simulators, facilities, and XR assets with accuracy. Model requirements by location, timeframe, and training demand.

5. **Automated Scheduling & Project Planning.** Generate optimized schedules based on constraints and resource availability. Identify bottlenecks and evaluate alternatives instantly.

6. **Smarter, Faster AI Powered Training Analysis.** Puts AI at the center of training analysis and design - recommending the right delivery media, detecting duplicate KSAs and content using fuzzy logic, diagnosing performance gaps, and suggesting targeted solutions. Its built-in AI chatbot supports both platform use and Instructional Design. Create branded reports with Microsoft Word templates, integrate smoothly through REST APIs, and use BNH Generative AI to extract key information from documents. The result: far less effort and much faster training analysis and design.

7. **Assess Impact & Manage Configuration.** Quickly identify how new systems, missions, or policies affect courses, lessons, and teaching points. Maintain training integrity as requirements evolve.

8. **Improve Training Efficiency & Reduce Waste.** ADVISOR strengthens training programs by continually mapping operational requirements to courses to expose gaps, duplications across courses and content, and low-value activities. Moreover, it reveals true cost drivers, quantifies impacts on cost, time and operational readiness, and consolidates all training data into concise, up-to-date, and actionable reports that drive smarter decisions and maximize training value.

9. **Aligned with Global Training Standards.** Fully supports CFITES, JSP-822, SADL, S6000T, MIL-HDBK-29612-2A, TRADOC, AETC, FAA, EASA, ICAO, and more. Automatically highlights gaps and impacts from regulatory or operational changes.

10. **Collaboration for Distributed Teams.** Web-based, centralized, and secure. Version control, change tracking, and configuration management built in. Compare versions and maintain audit-ready documentation.

11. **Flexible, Modular & Configurable.** Use any module independently or as a complete ecosystem. Customize fields, workflows, taxonomies, and reports. Deploy on-premise or via annual cloud licensing.

## 1.3 System Requirements

**Database/Server Minimum Requirements**

- 2 CPU Processor with 16 GB of RAM
- 50 GB of free Hard Disk Space
- Windows 2016, 2019, 2022, 10, 11 **or** Oracle Solaris 9.0 or higher, **or** Linux
- Web Application Server capable of running Java Servlet such as Tomcat 9.x or higher.
- Java version 1.8 or higher or JDK 14.0.2 open source or higher
- Oracle version 11g, 12c, 18c or 19c, or 21c.

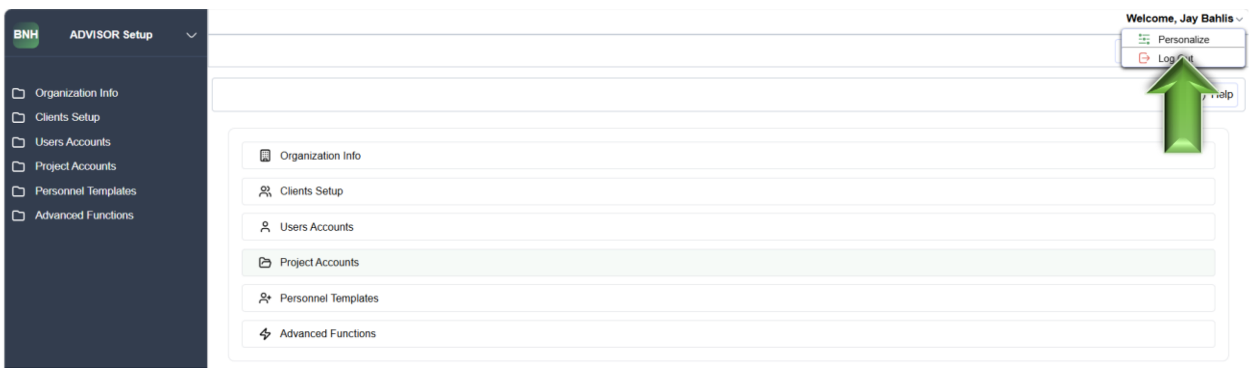
**Workstation/Desktop Minimum Requirements**

- Computer/Notebook with 4 GB of RAM
- 200 MB of free Hard Disk Space
- Windows 10, 11, 2016, 2019, 2022 **or** Oracle Solaris 9.0 or higher
- Microsoft Edge, Google Chrome, Firefox, or Safari

## 1.4 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?

## 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.

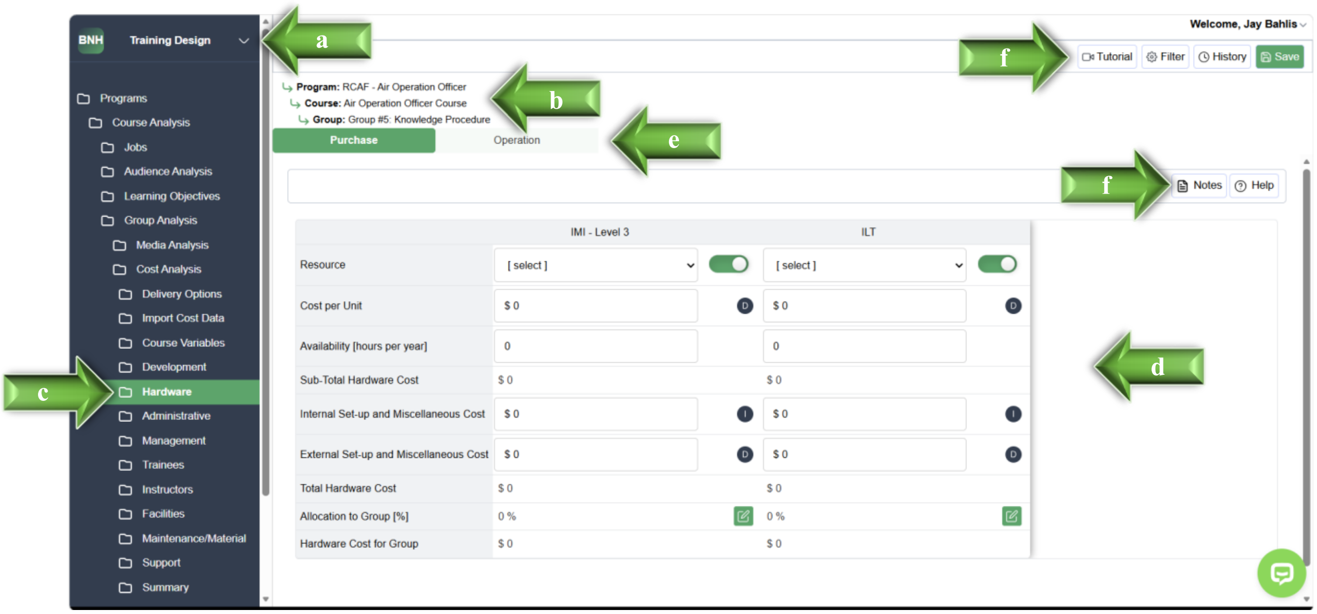
a) Modules (dropdown). Is your main navigation point for accessing and configuring licensed ADVISOR Enterprise module. It lists all modules available to your account, allowing you to switch quickly between functions such as Training Analysis, Training Design, Resource Management, and others. To select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

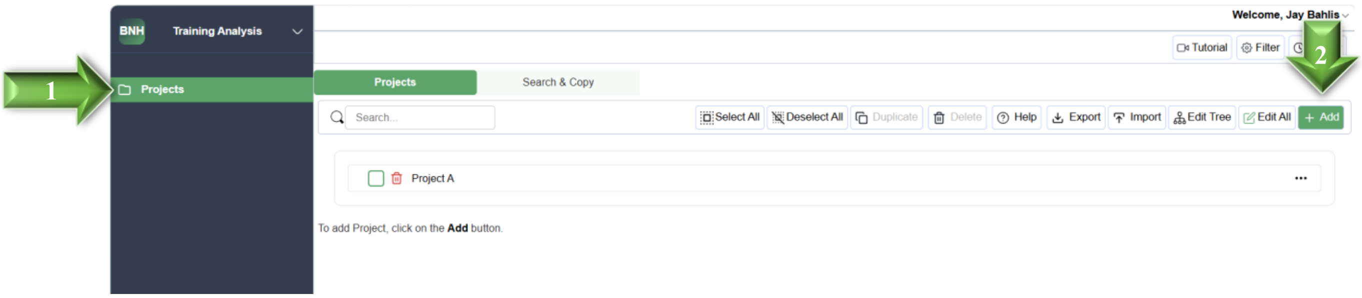


f) Action Buttons. The Action Buttons give you quick access to the most common operations within ADVISOR. These buttons appear in the Main Window and allow you to manage records, update information, adjust hierarchies, and access support tools. You can use Action Buttons to:
   - **Add**, **Duplicate**,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

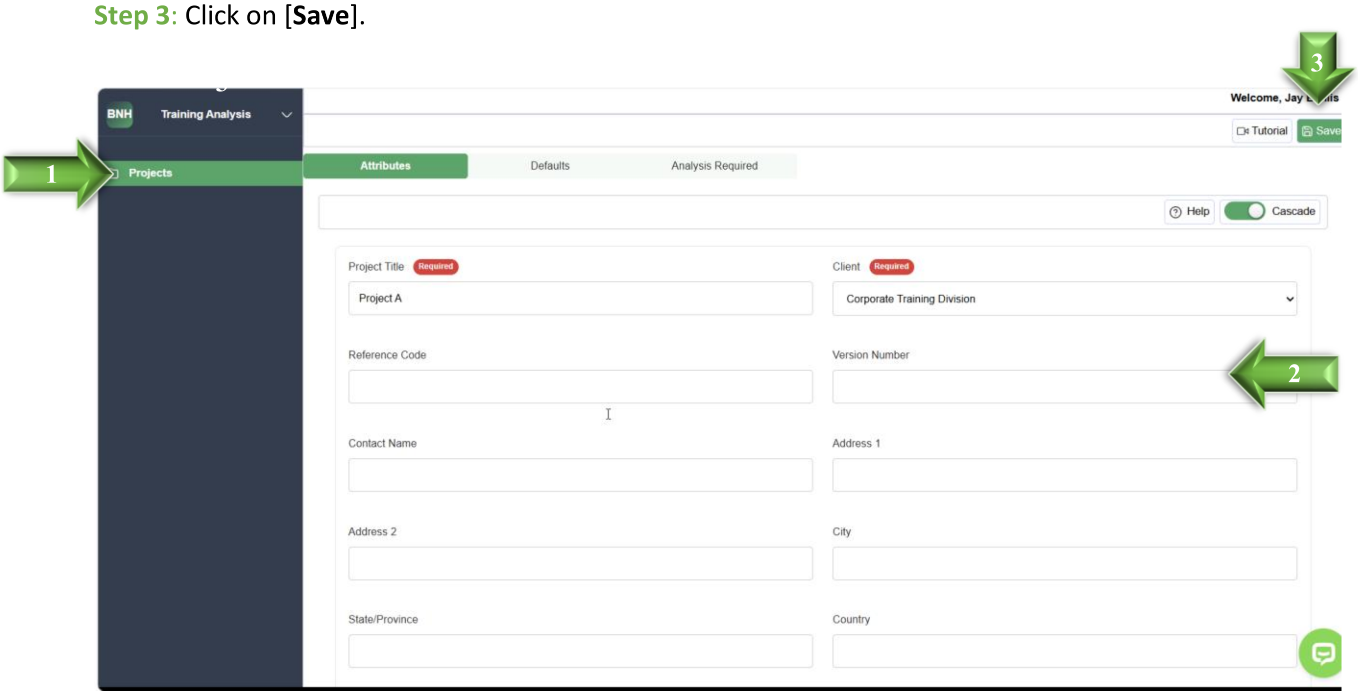
These buttons streamline your workflow and ensure that all key actions are always within reach.

## 1.6 Basic ADVISOR Functions

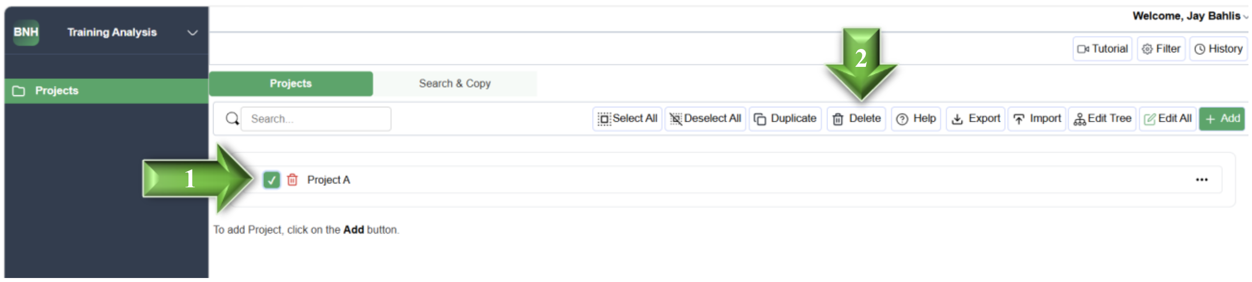
**Add:** To add a Project, Mission, Job, Task, Objective, Course or any other element:
Step 1: Click on corresponding folder (Projects, for example).
Step 2: Click on [**Add**].
Step 3: Input the desired info.
Step 4: Click on [**Save**].



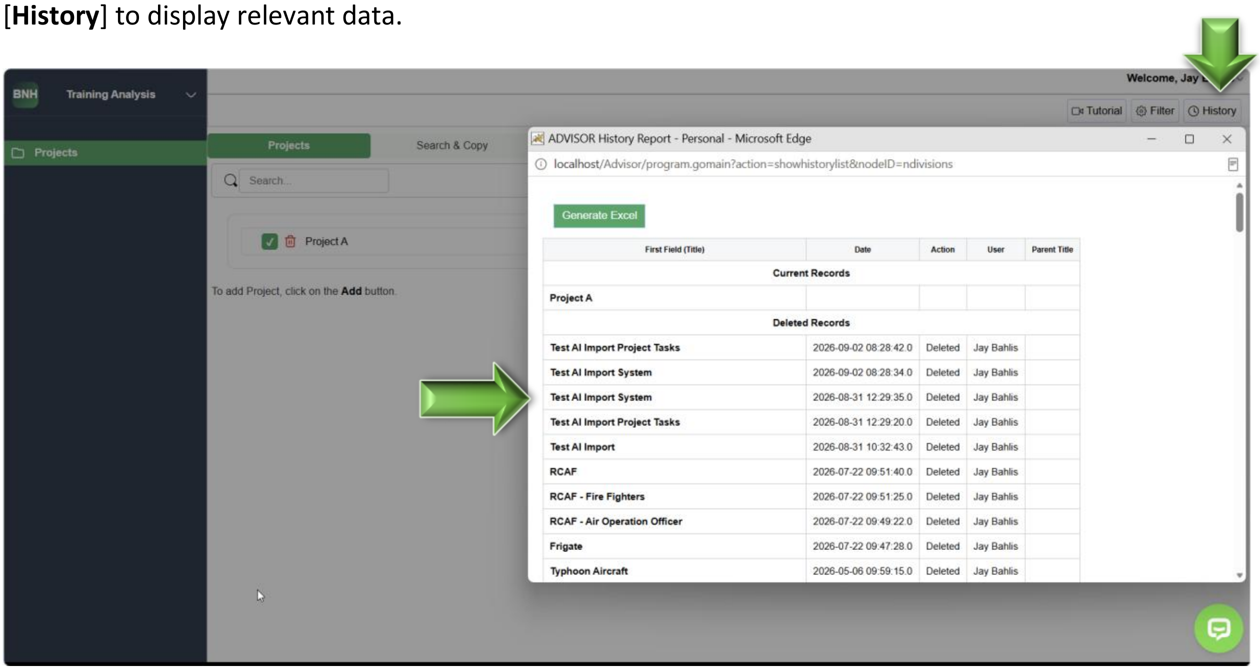

**Edit:** To edit a Project, Mission, Job, Task, Objective, Course, or any other element:
Step 1: Click on corresponding record title (Project A, for example).
Step 2: Modify the desired info.
Step 3: Click on [**Save**].



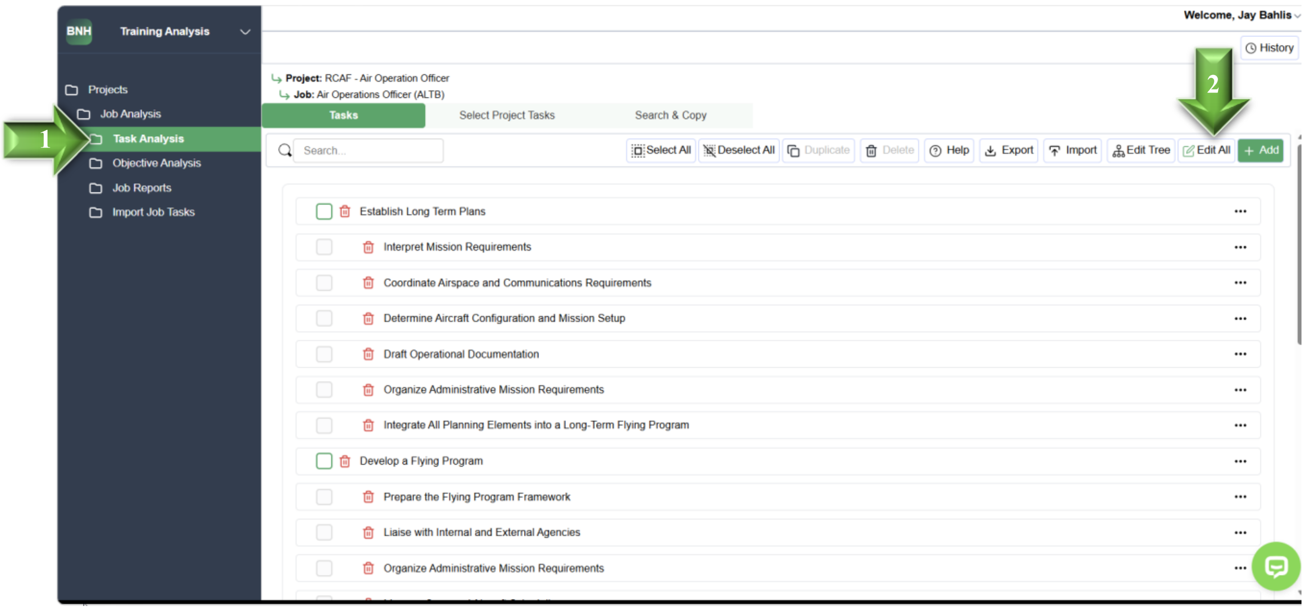
**Delete:** To delete a Project, Mission, Job, Task, Objective, Course or any other record:
**Step 1:** Place checkmarks next to the desired records (Project A, for example).
**Step 2:** Click on [**Delete**].



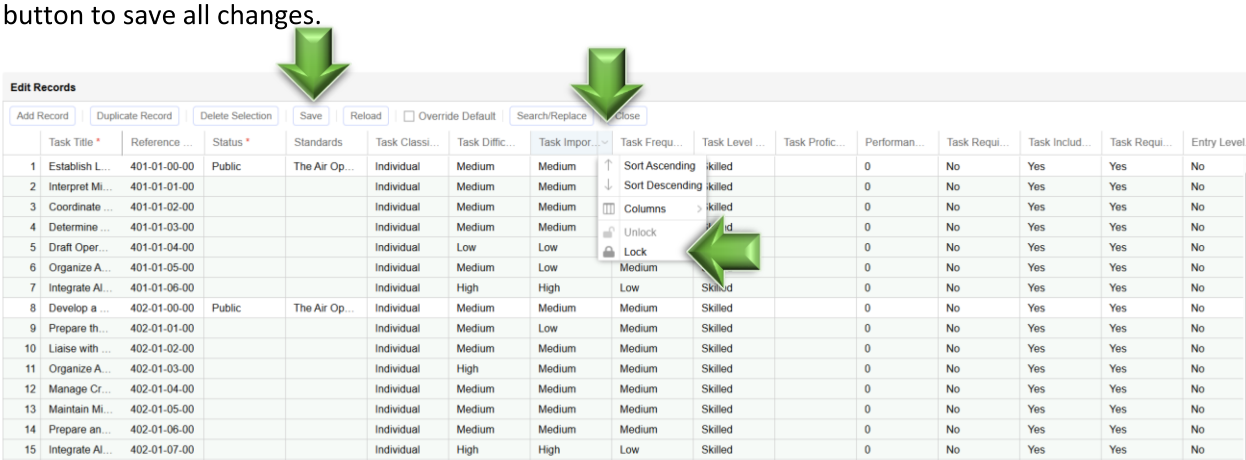

**Track Changes:** To find out when a record was created, modified or deleted and by whom, click on the [**History**] to display relevant data.



**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**].



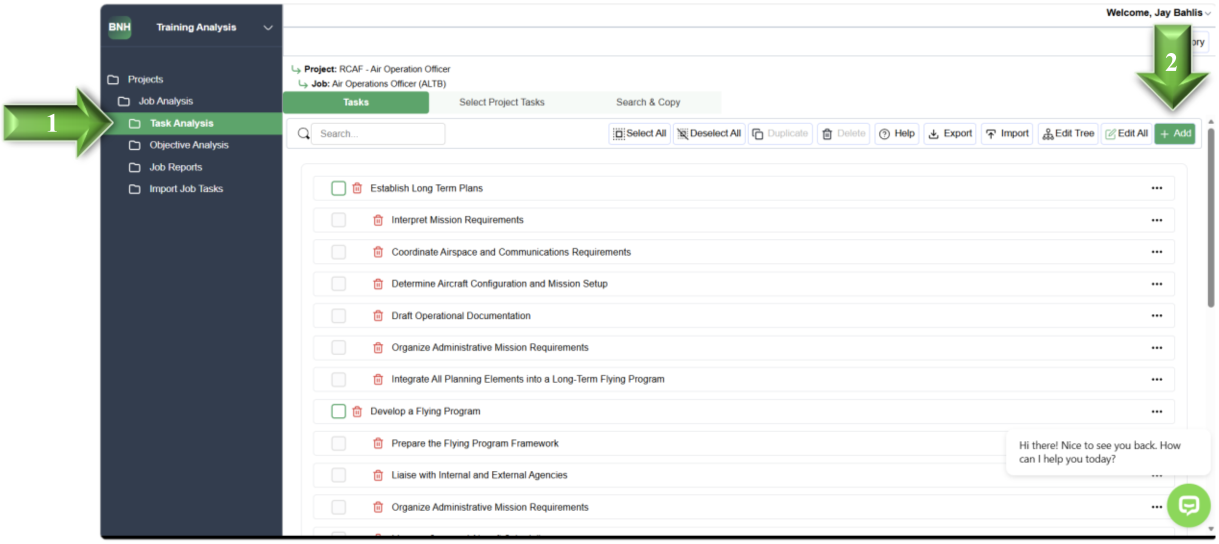
The Projects, Missions, Jobs, Tasks, Objectives, Courses, and so forth are presented in an Excel like tabular format. You may sort the data on any column (Title, for example), or lock (prevent the column from scrolling), by clicking on the arrow to the right of the column title and selecting desired 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.



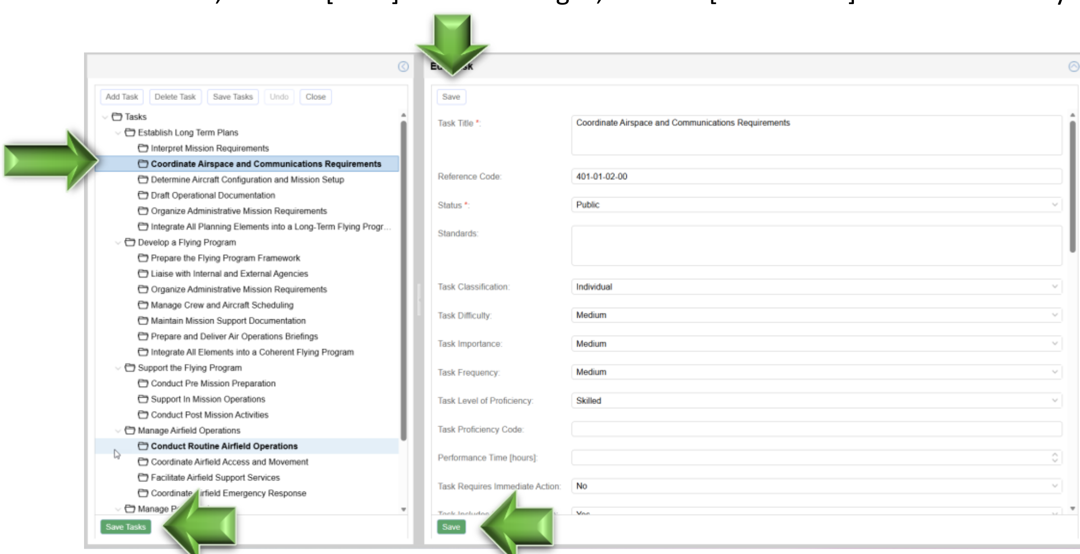
Notes:

- 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**].

**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:

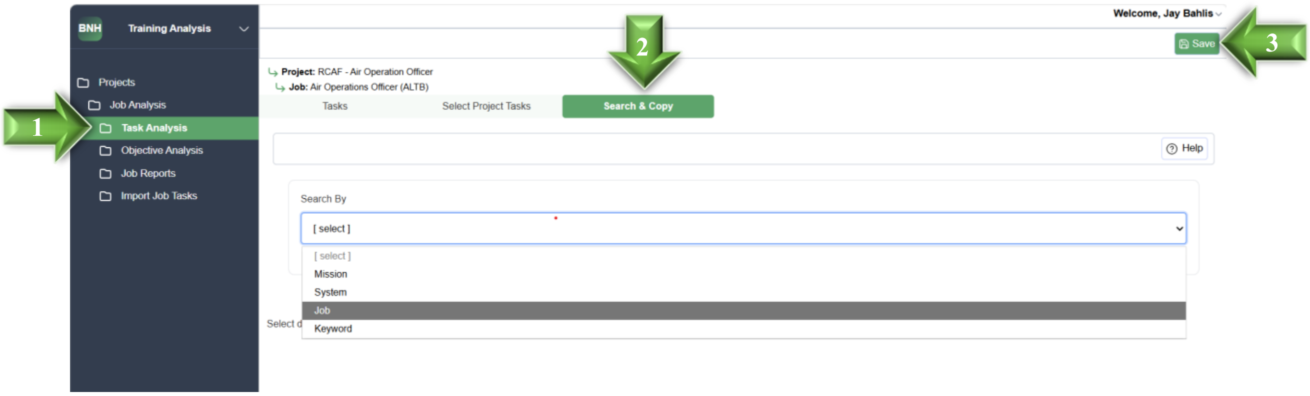
- To copy record including children, right click on record (Task, for example) and select "Copy". Next, right click on another record in tree and click "Paste".
- To delete multiple records at one time, press "Ctrl +C" to select tasks and click "Delete Task" button.
- Status of folders (i.e., open or 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.

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

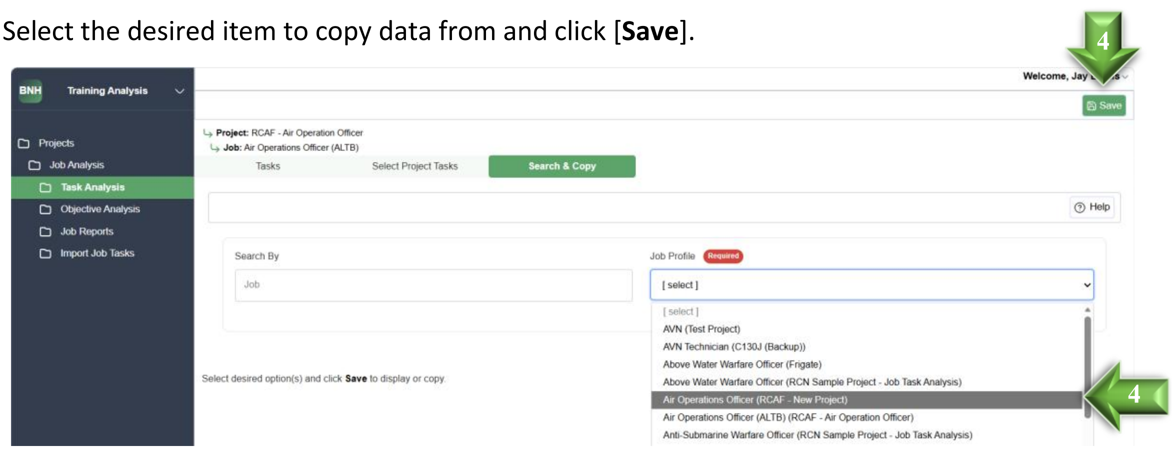
Step 1: Click on the desired folder – Mission Analysis, System Analysis, Job Analysis, Tasks Analysis, Performance Objectives or Course Analysis.

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

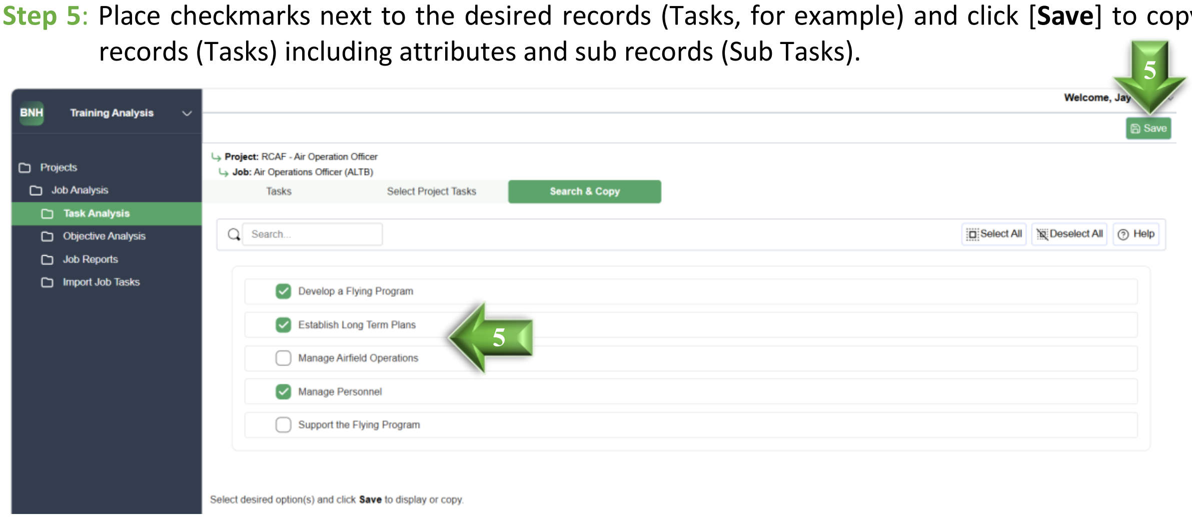
Step 3: Select the desired search criterion and click [**Save**] – more options may be provided – to display available elements.



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.

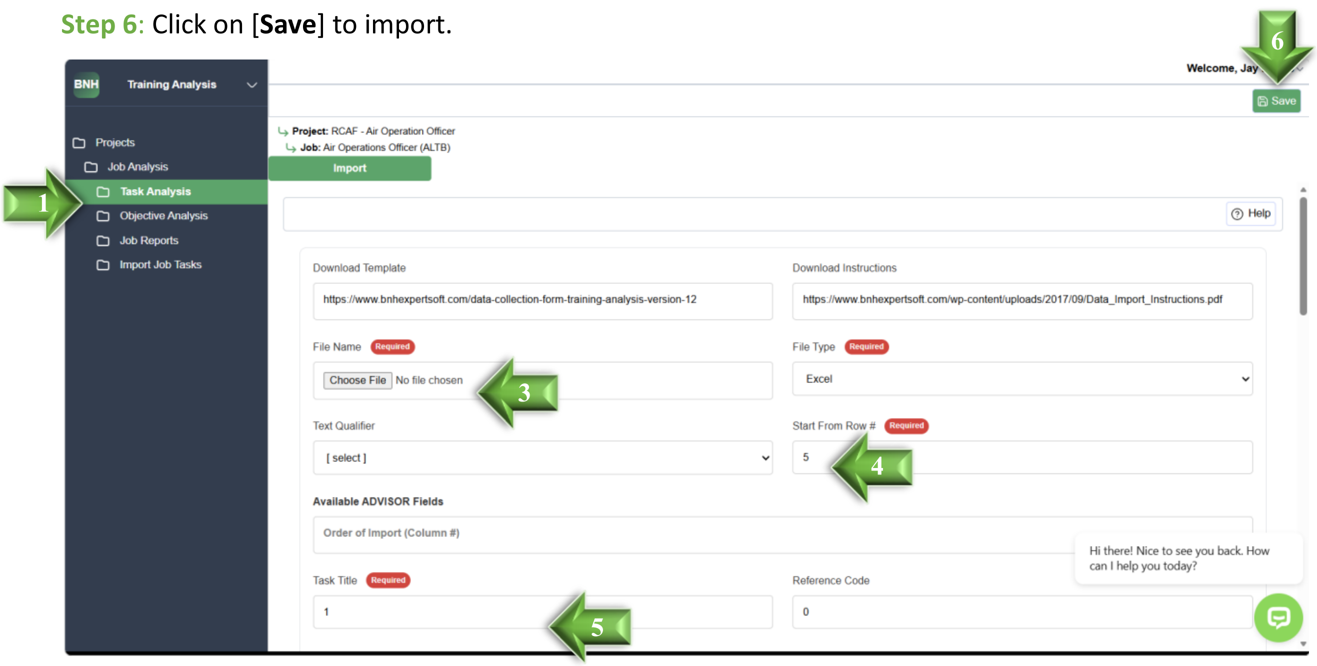
Step 2: Click the [**Import**] button to start the upload process. In some cases, you are given the option to import either **Excel** or **xml**. Select the format that corresponds to the data you are working with.

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.

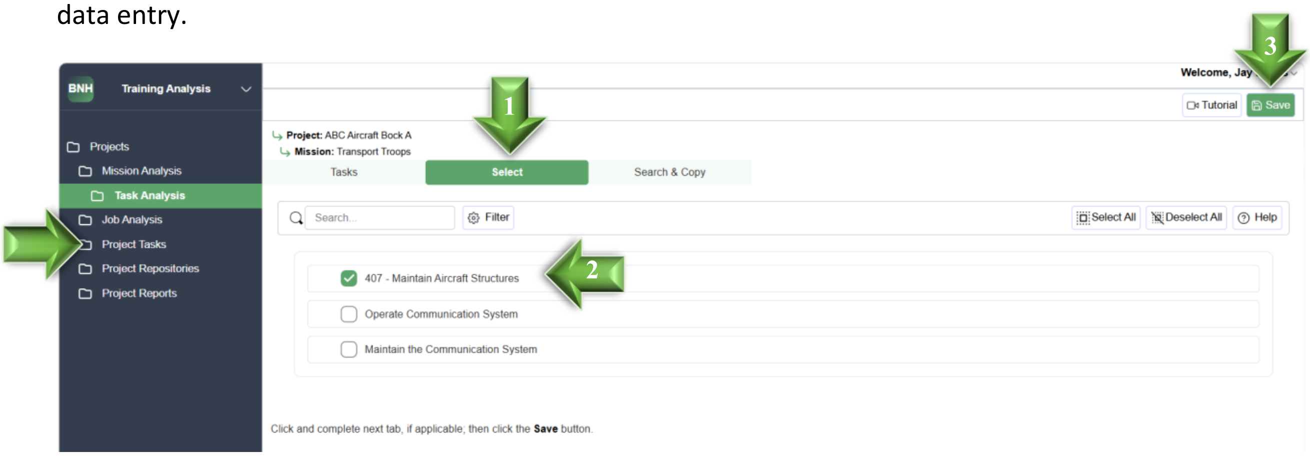
Step 5: Indicate where the data for each field resides within the Excel spreadsheet by entering the corresponding column number. For example, if **Task Title** is stored in **Column 1**, then enter **1** in the Task Title field. Data in Excel spreadsheets is sequentially mapped to the corresponding fields 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.



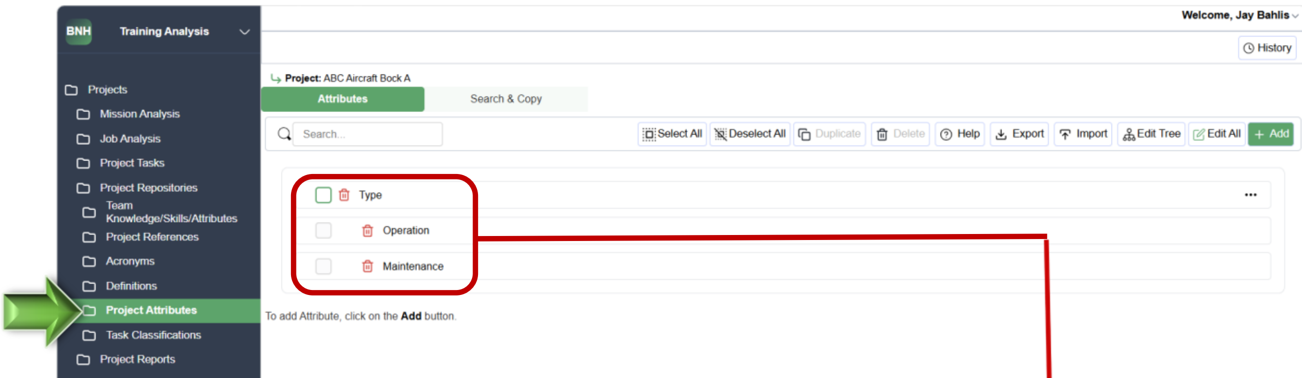

Note: The **Reference Code** is also used by ADVISOR to detect duplicate records during import. When a Job Task is imported, ADVISOR first checks whether the Job already contains a Task with the same Reference Code. If a matching Reference Code is found, ADVISOR displays the following message "Duplicate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

**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.

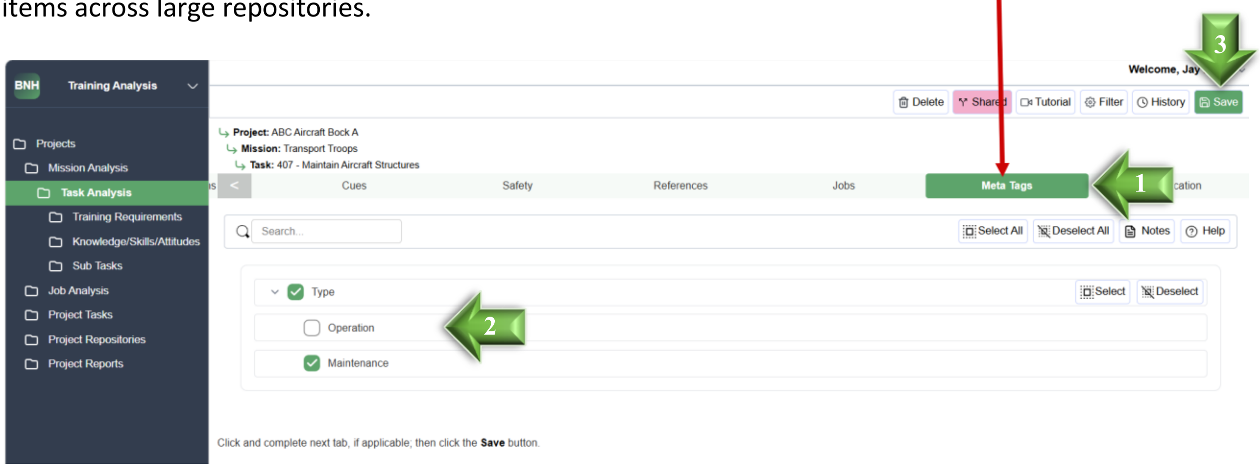



**Assign KSAs to Tasks or Objectives:** Similarly, Knowledge, Skills and Attitudes (KSAs) are stored under Team Knowledge/Skills/Attributes within Project Repositories, which serves as a centralized repository. KSAs and can be assigned to any Task or Objective by clicking the [**Select**] tab, placing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

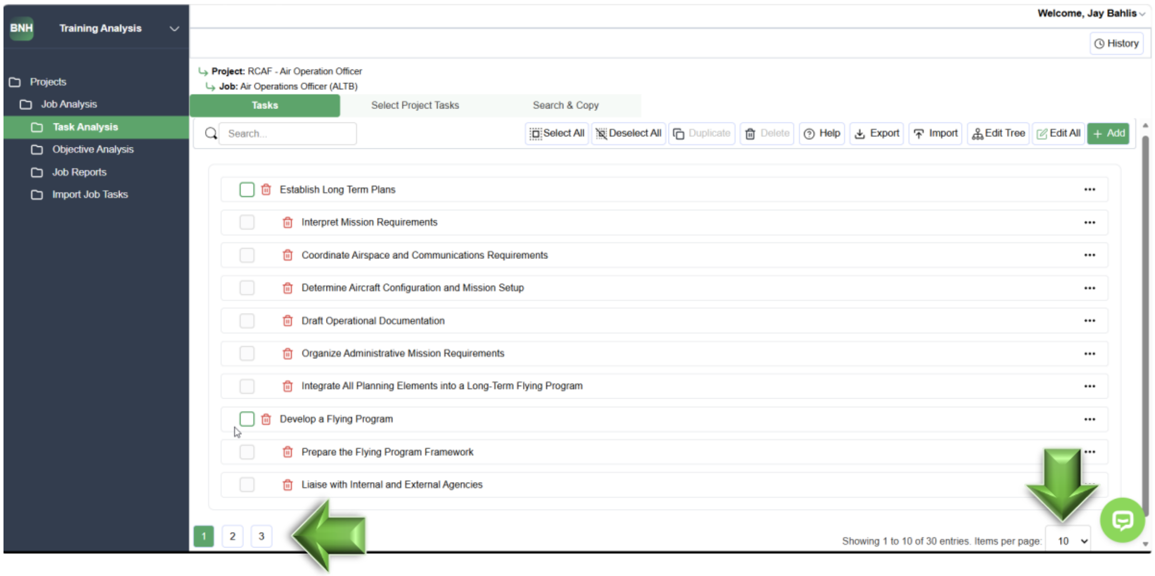
**Setup and Assign Meta Tags:** To quickly zero in on desired Tasks or KSAs within a repository, Meta Tags can be created under the Project Attributes folder.



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.

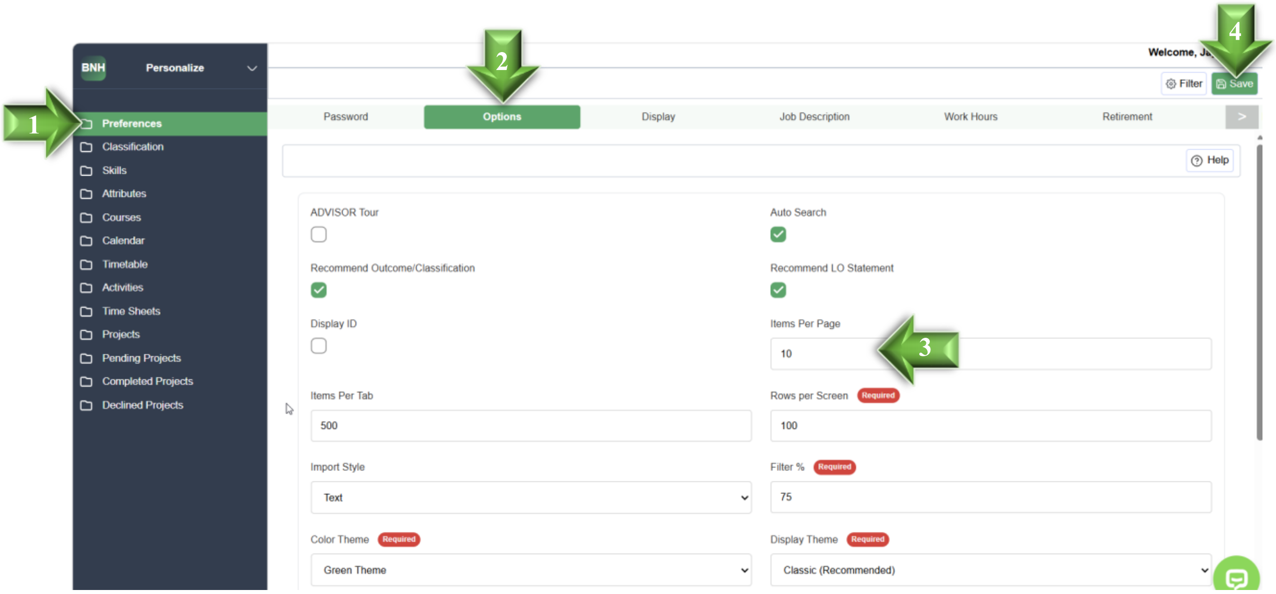


**Display Settings – Records per Page:** By default, 10 items (such as Projects, Tasks, Objectives, Knowledge/ Skills/Attitudes, and others) are displayed on each page. When the number of items exceeds 10, the additional items are shown on subsequent pages. The total number of pages available is displayed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

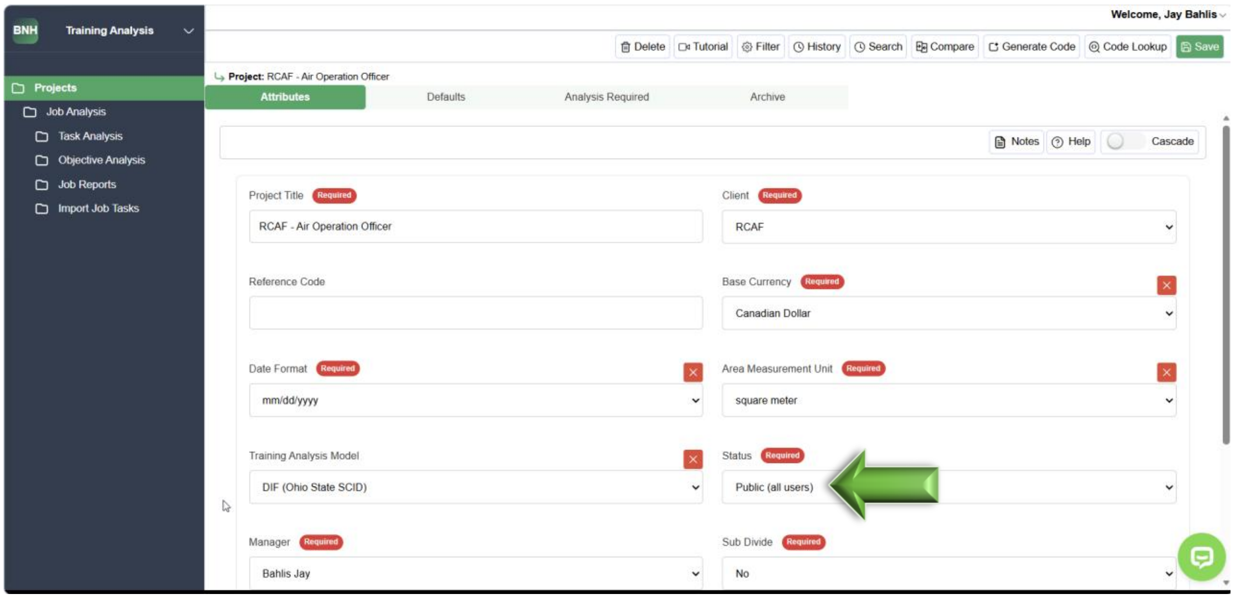



**Modify the Number of Records Displayed per Page:** You can adjust how many records are displayed on each page in two ways:

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**].

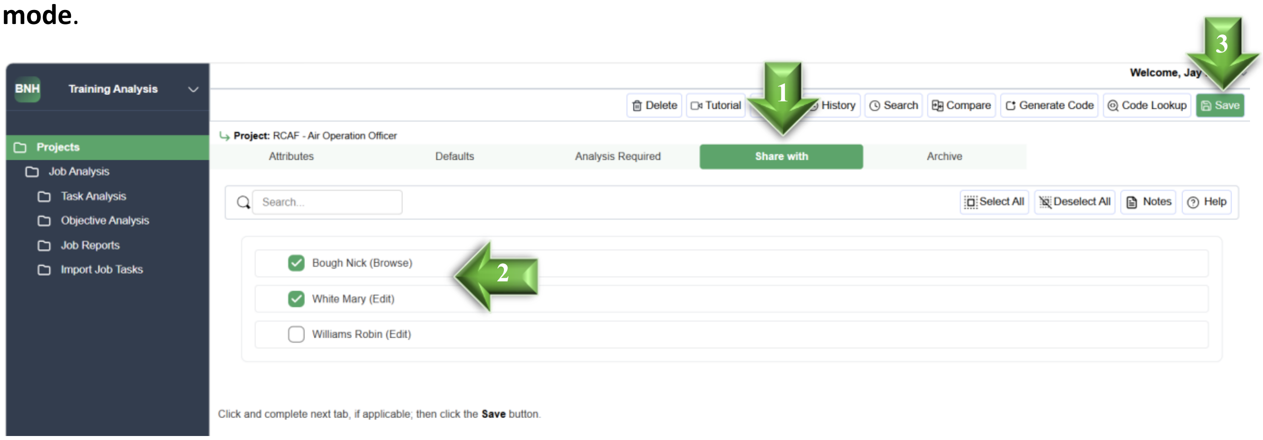


**Control Data Visibility and Reuse:** By default, when a new Project, Mission, System, Job, or Task is created, its **Status** is set to **Public**. This allows other users to find, copy, and reuse the item through the Search function – helping minimize duplication and streamline analysis efforts. Setting 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.

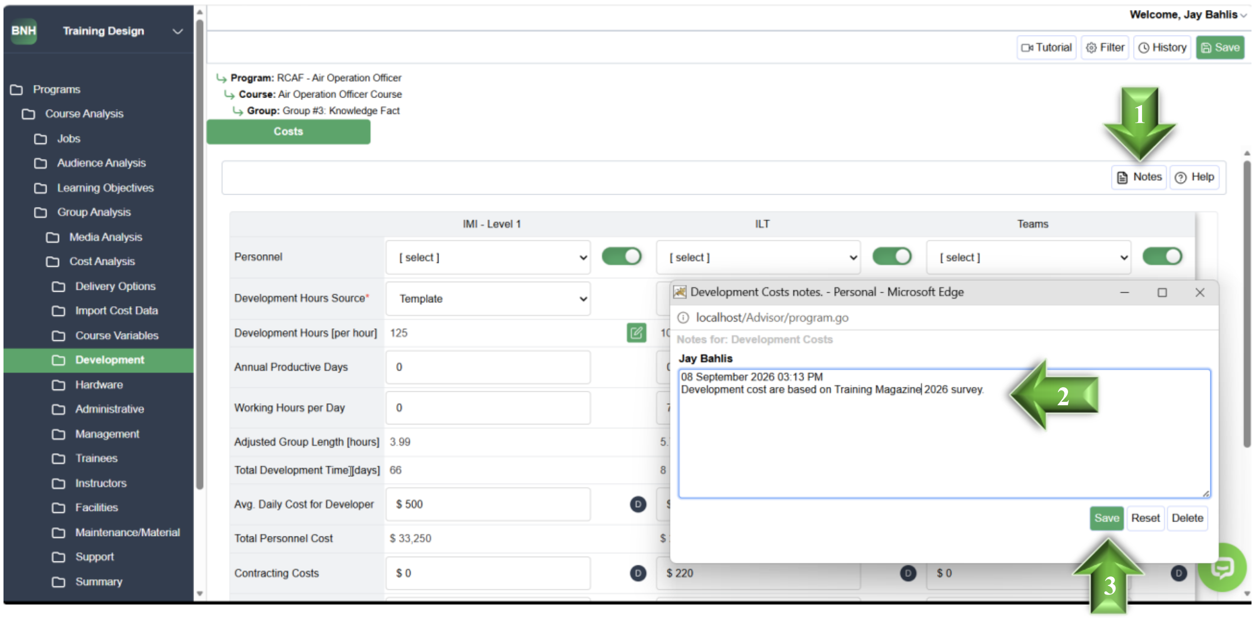



**Manage Collaboration and User Access:** Each analysis – such as a Project, Course, or similar item – is assigned to a specific User (Manager), typically the individual who created it. By default, only the Manager can view and modify the Project or Course. To allow other users to review or make changes, 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.

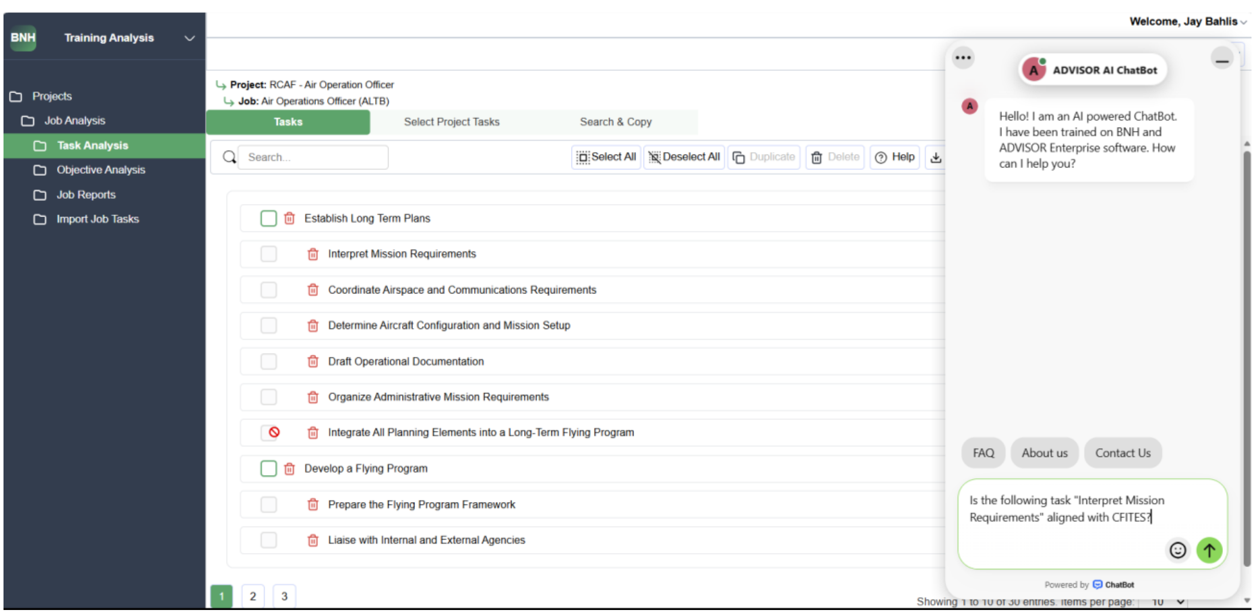
If the Project or Course Manager reports to another user, the Project or Course is automatically shared with that Supervisor. In this case, the checkmark next to the Supervisor's name appears in **read-only mode**.



**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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## 1.7 Learning ADVISOR

To use ADVISOR, you should know how to perform basic computer, Windows and Browser operations. For example, how to start and quit applications, selecting commands and dialog box options. To facilitate the learning process, ADVISOR comes with its own set of online tools. These include:

- **AI Powered Assistance** is embedded within ADVISOR Enterprise to answer questions about ADVISOR, provide Instructional Design Guidance, and reference relevant standards such as CFITES, JSP-822, MIL-HDBK-29612-2A, SADL and S6000T. Whether you're seeking best practices or practical guidance, support is always at your fingertips
- **Context Sensitive Online Help and Tutorials** are available for each screen and can be displayed by clicking the [**Help**] button. In addition, context-sensitive video clips are embedded throughout ADVISOR to provide quick visual guidance. These clips can be viewed by clicking the [**Tutorial**] button.
- **User Guides** provide comprehensive descriptions of the functionality within each ADVISOR module. These guides help users understand configuration options, workflows, and analysis processes in depth. To download, please visit: https://bnhexpertsoft.com/user-guides-version-13-0/.
- **Step-by-Step Guides** are available for configuring ADVISOR and conducting various types of analysis, including Mission Analysis, System Analysis, Competency Analysis, Job Task Analysis, Media Analysis, Cost Analysis, Fidelity Analysis, and Performance Analysis. To view or download these guides, please visit: https://bnhexpertsoft.com/user-guides-version-13-0/.
- **Online Tour** is a slide show that highlights ADVISOR's main features. It is automatically presented after the user logs into ADVISOR. You can hide and redisplay the tour by unchecking or rechecking the **ADVISOR Tour** field under the **Options** tab, located within the **Preferences** node under **Personalize**, and then clicking [**Save**].
- **Video Clips** to gain a better understanding of ADVISOR's main functions and features, you can view short video clips that demonstrate key capabilities and workflows. To access these videos, please visit: http://www.bnhexpertsoft.com/how-to-video-overview/ .
- **Answers to Frequently Asked Questions** are available online to help users quickly resolve common setup and usage issues. To view the FAQs, please visit: http://www.bnhexpertsoft.com/faq-1-install/.
- **Basic Excel Data Collection Forms** are available online for various ADVISOR data elements, along with detailed data import instructions. These forms simplify offline data entry and ensure consistency with ADVISOR's data structure. To download the forms, please visit: http://www.bnhexpertsoft.com/data-collection-forms-configuration-version-12/.
- **Detailed Excel Data Collection Forms** are available online for Project Tasks, System/Competency Tasks and Job Tasks along with comprehensive data import instructions. These forms streamline offline data entry and ensure accurate mapping to ADVISOR's data structure. To view or download the forms, please visit: http://www.bnhexpertsoft.com/detailed-data-collection-forms-version-12/.
- **Sample Reports** from each module are available online to help users understand report formats, data presentation, and output structure. These examples illustrate how results are summarized and displayed across different analyses. To view, please visit: http://www.bnhexpertsoft.com/reports/.
- **Technical Support**: is available Monday through Friday from 8:00 am to 6:00 pm EST. You can reach support team by email support@bnhexpertsoft.com or by calling 1 (514) 745-4010.

# Chapter 2: Setup Clients

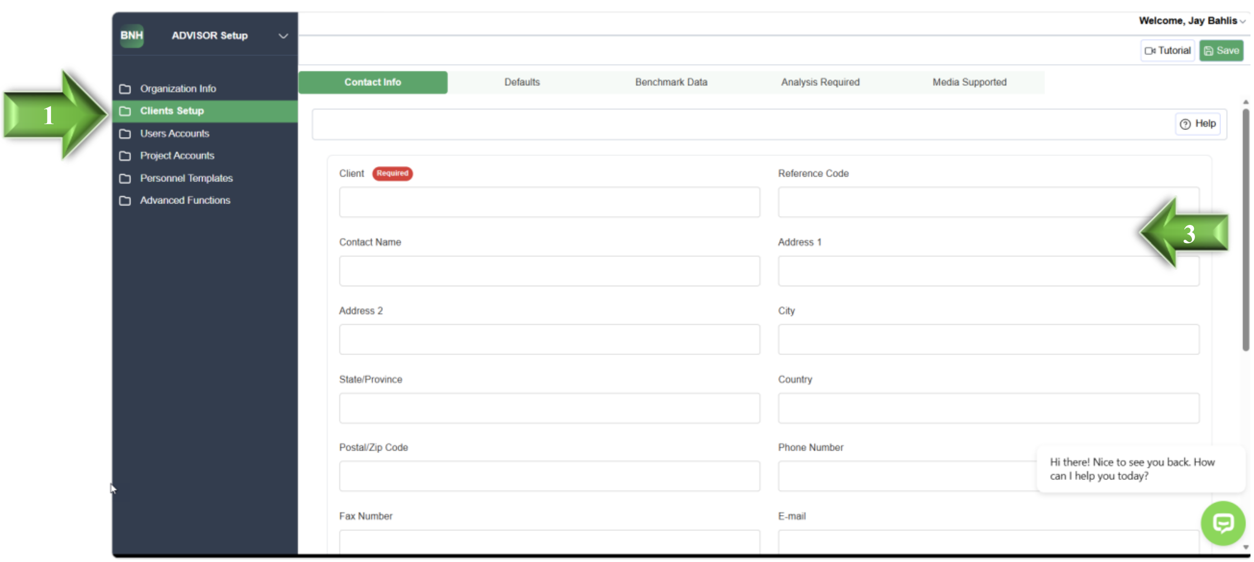
## 2.1 Setup New Client

**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.

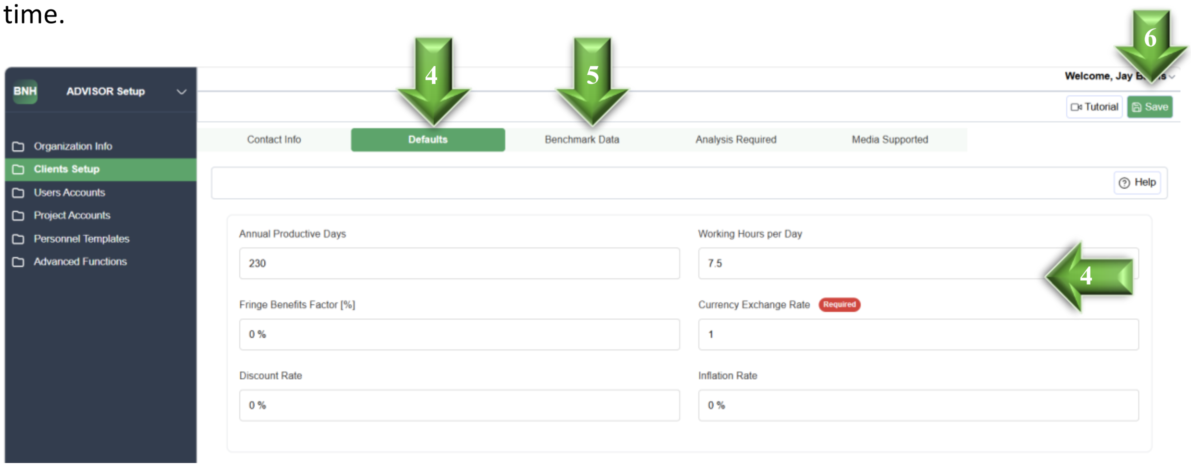
Step 2: Click on [**Add**].

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.



**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**].

## 2.2 Configure Client – Analysis Required

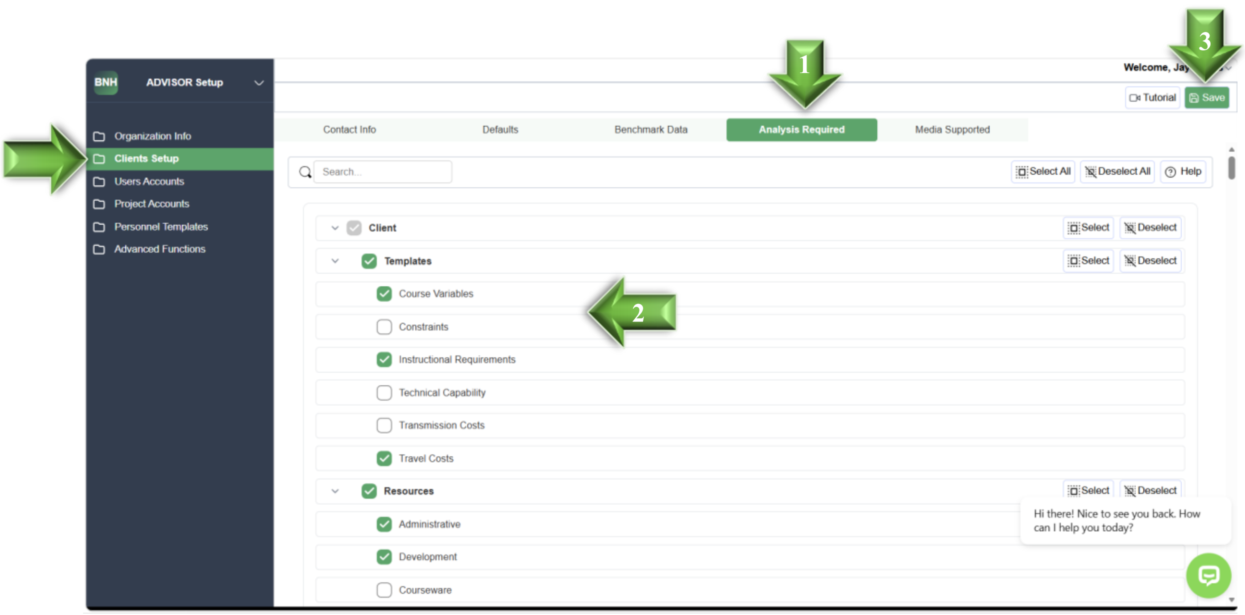
Step 1: Click the [**Analysis Required**] tab to define what data will be collected and which analyses need to be performed

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.

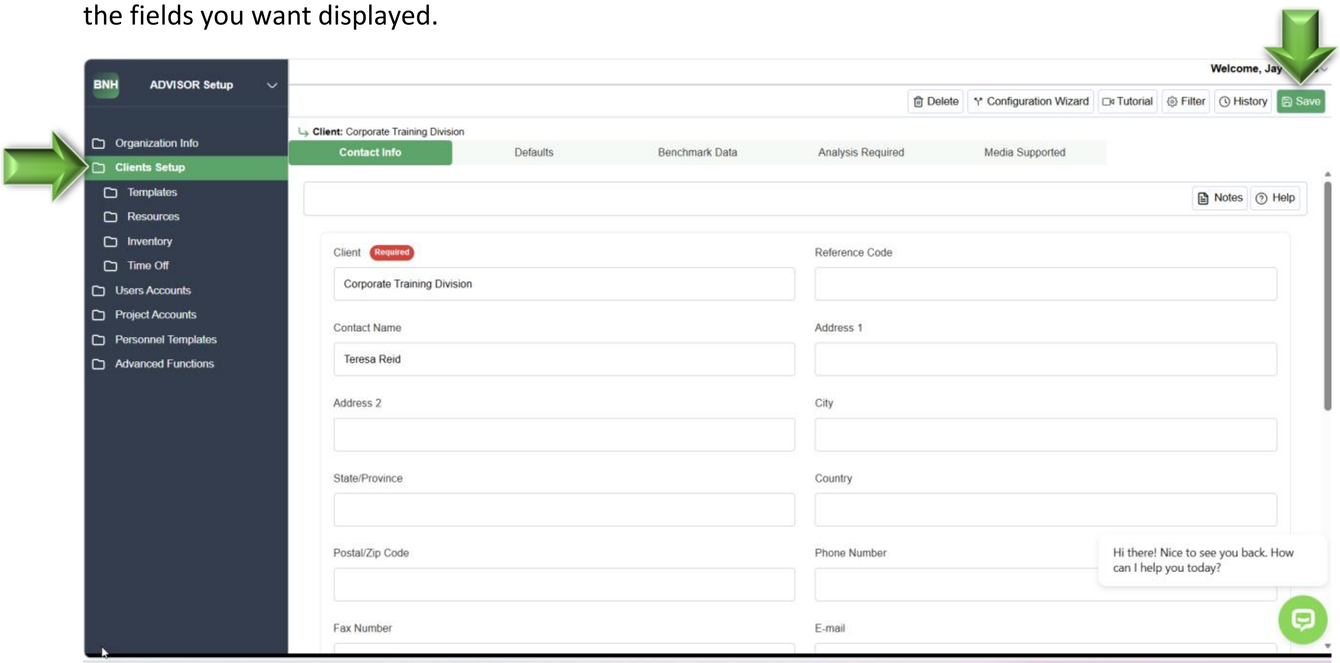



Step 3: When you're finished updating the settings, click [**Save**] to apply the Client's configuration.

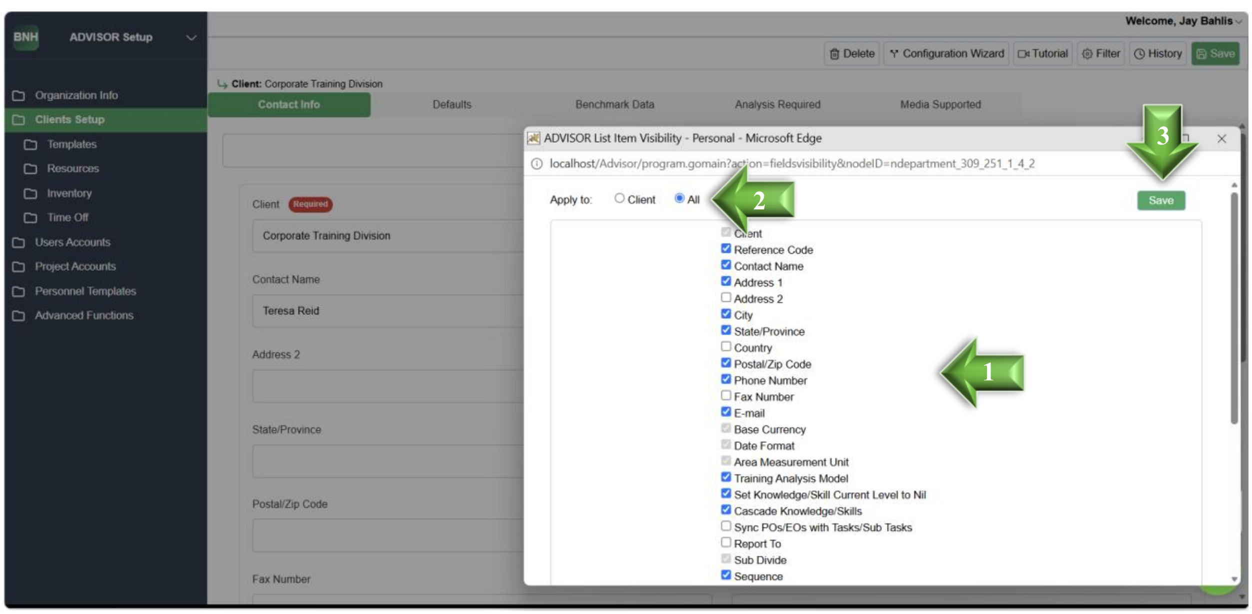
<u>Note:</u> If needed, you can adjust the configuration for a single project, course, or solution. Simply turn off the **Cascade** option, then open the [**Analysis Required**] tab and select or clear the items you want to apply to that specific project, course or solution.

## 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.



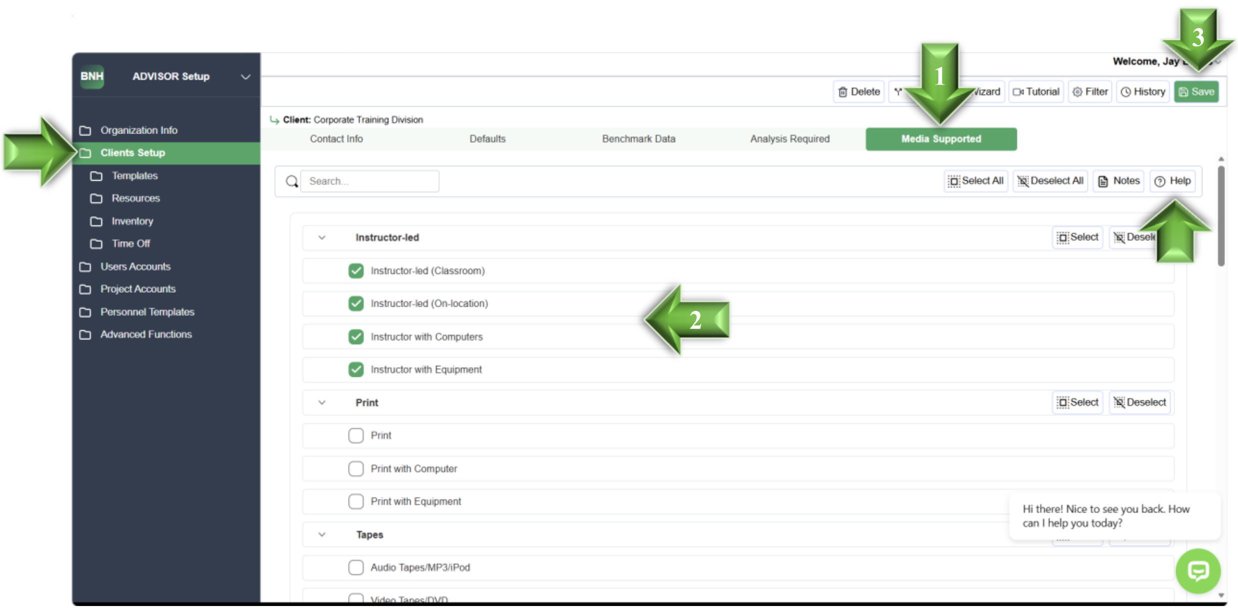
## 2.4 Configure Client – Delivery Options Supported

**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.

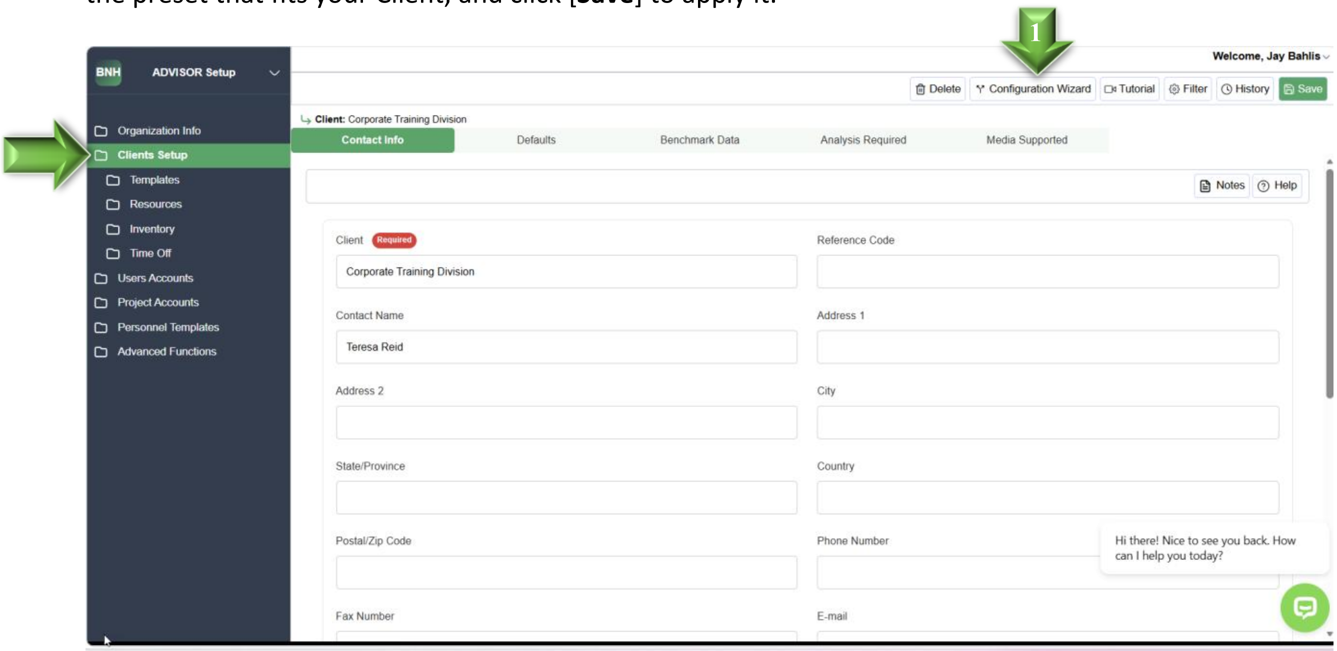
**Implication:** ADVISOR will only consider the selected Delivery Options when analyzing Courses for this Client. Unsupported options - such as Print in the example – will not be recommended and all related fields will be hidden automatically. This keeps the interface focused and reduces the time required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

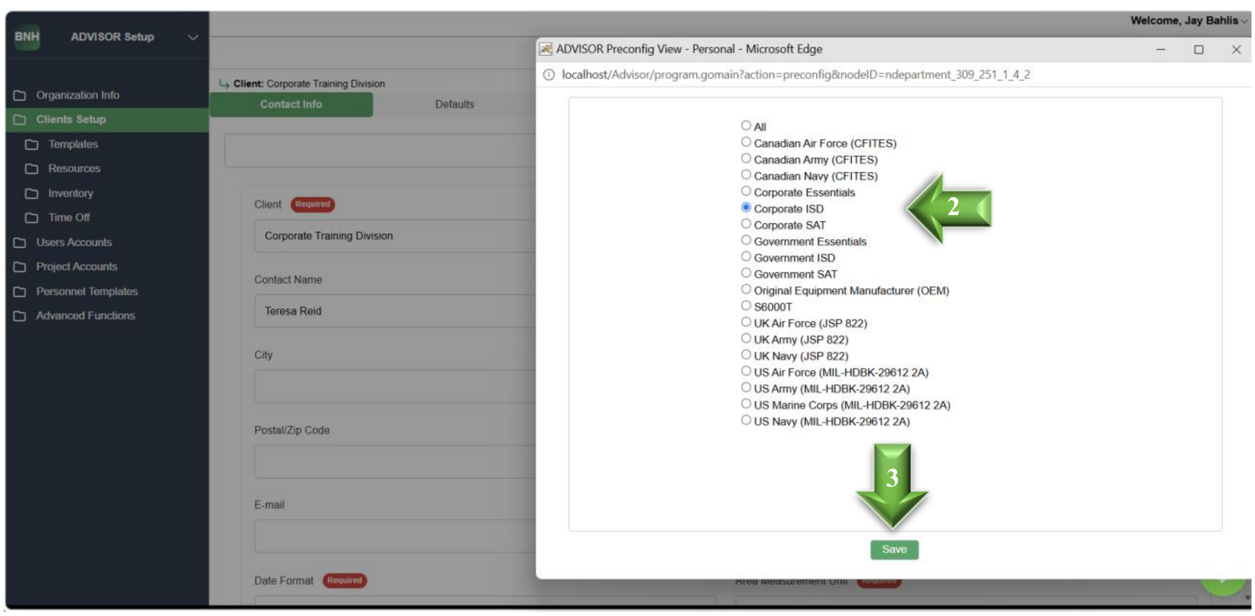



**Step 3:** When you've finished selecting the delivery options, click [**Save**] to apply them to the Client's analysis.

## 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.

## 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:

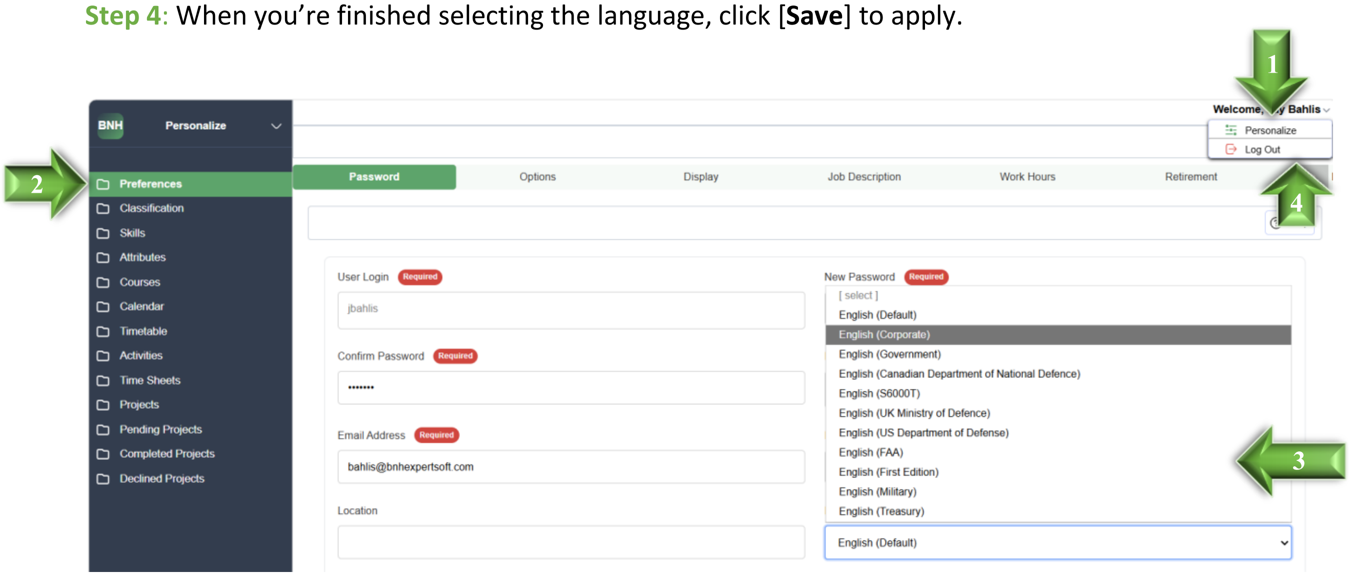
**Step 1:** Click on [**Personalize**]

**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.



## 2.7 Modify Taxonomy

You can tailor any taxonomy to match the terminology preferred by a Client. To make changes, proceed as follows:

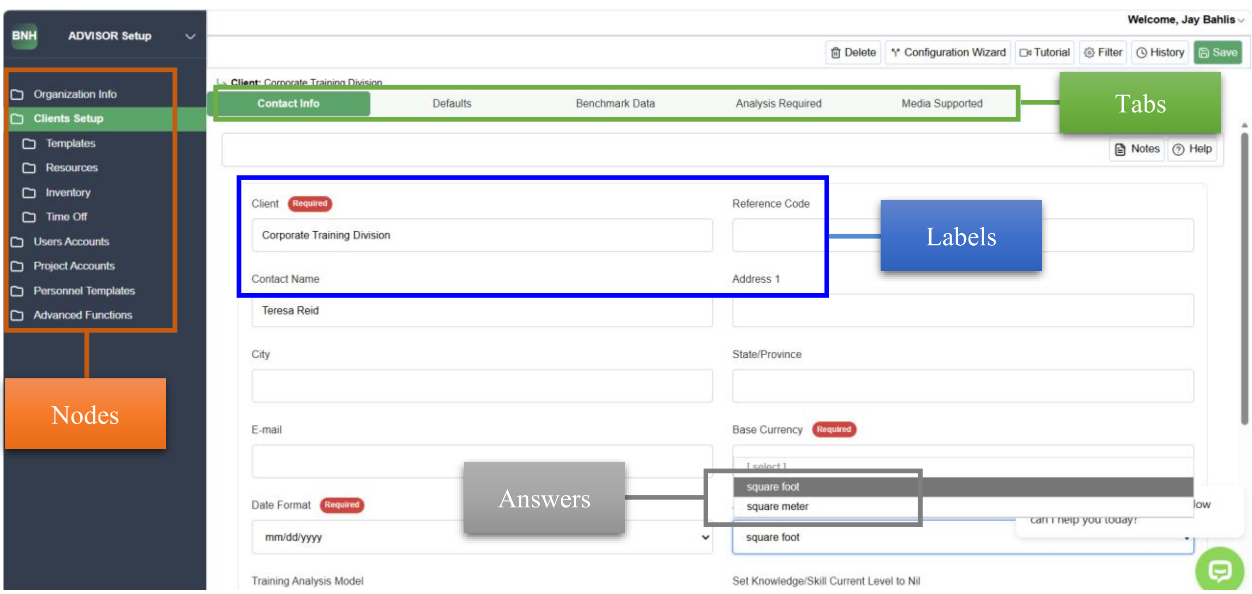
**Step 1**: Use the table below to find the files associated with the taxonomy you want to modify. Each taxonomy consists of five files, located on the ADVISOR server in the following directory "…/Advisor/Adv/WEB_INF/classes/language".

| | |
|---|---|
| English (Corporate) | nodes_en_US_**corps**.properties<br>tabs_en_US_**corps**.properties<br>labels_en_US_**corps**.properties<br>answers_en_US_**corps**.properties<br>messages_en_US_**corps**.properties |
| English (Government) | nodes_en_US_**govrn**.properties<br>tabs_en_US_**govrn**.properties<br>labels_en_US_**govrn**.properties<br>answers_en_US_**govrn**.properties<br>messages_en_US_**govrn**.properties |
| English (Canadian Department of National Defence) | nodes_en_US_**cdndnd**.properties<br>tabs_en_US_**cdndnd**.properties<br>labels_en_US_**cdndnd**.properties<br>answers_en_US_**cdndnd**.properties<br>messages_en_US_**cdndnd**.properties |
| English (UK Ministry Defence) | nodes_en_US_**ukmod**.properties<br>tabs_en_US_**ukmod**.properties<br>labels_en_US_**ukmod**.properties<br>answers_en_US_**ukmod**.properties<br>messages_en_US_**ukmod**.properties |
| English (US Department of Defense) | nodes_en_US_**usdod**.properties<br>tabs_en_US_**usdod**.properties<br>labels_en_US_**usdod**.properties<br>answers_en_US_**usdod**.properties<br>messages_en_US_**usdod**.properties |
| English (S6000T) | nodes_en_US_**s6000t**.properties<br>tabs_en_US_**s6000t**.properties<br>labels_en_US_**s6000t**.properties<br>answers_en_US_**s6000t**.properties<br>messages_en_US_**s6000t**.properties |
| English (Version 1) | nodes_en_US_**dndattr**.properties<br>tabs_en_US_**dndattr**.properties<br>labels_en_US_**dndattr**.properties<br>answers_en_US_**dndattr**.properties<br>messages_en_US_**dndattr**.properties |

| | |
|---|---|
| English (Version 2) | nodes_en_US_**dnd**.properties<br>tabs_en_US_**dnd**.properties<br>labels_en_US_**dnd**.properties<br>answers_en_US_**dnd**.properties<br>messages_en_US_**dnd**.properties |

Each taxonomy consists of five files, with each one controlling a different part of the ADVISOR interface:

- **Nodes** "nodes_en_US_xxx.properties" contains the names of folders and nodes in the navigation tree, such as *Organization Info* or *Templates.*
- **Tabs** "tabs_en_US_xxx.properties" defines the tabs shown at the top of each screen, like *Contact Info* or *Defaults*.
- **Labels** "labels_en_US_xxx.properties" provides the field labels you see in the work window, such as *Client* or *Address 1*.
- **Dropdown Values** "answers_en_US_xxx.properties" lists the items available in drop-down menus, such as *square foot* or *square meter*.
- **Messages** "messages_en_US_xxx.properties" contains system messages, warnings, and report headers used throughout ADVISOR.





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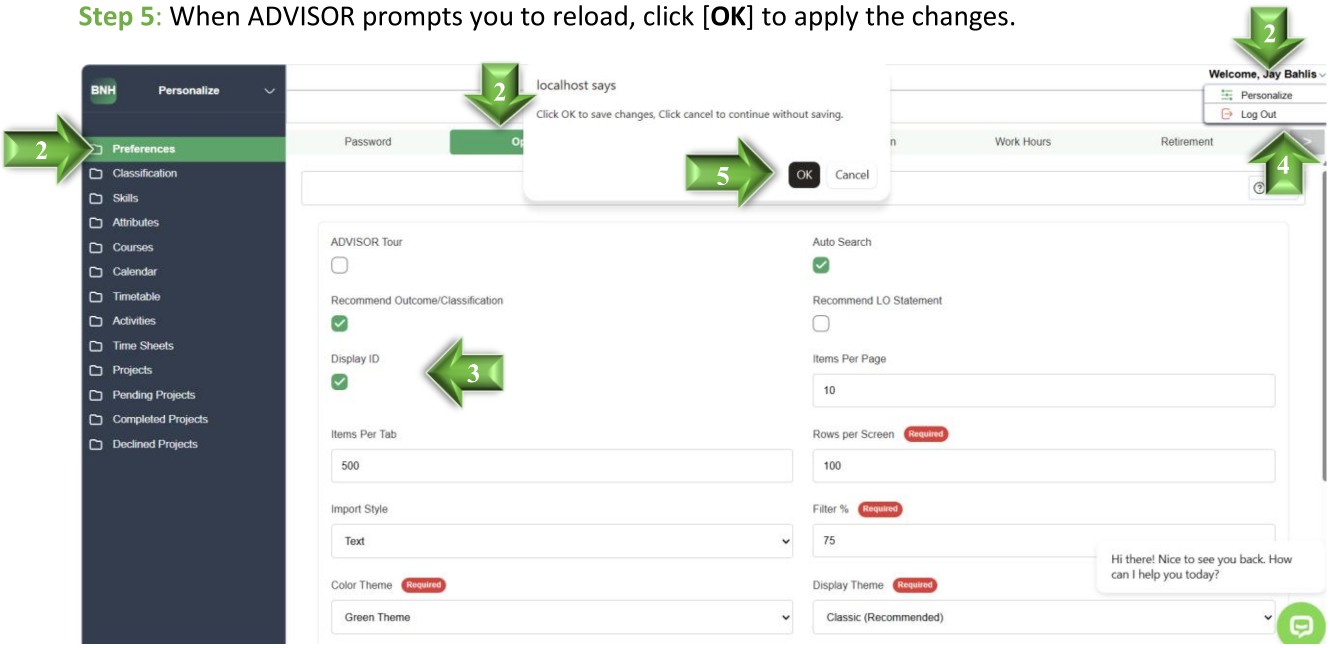
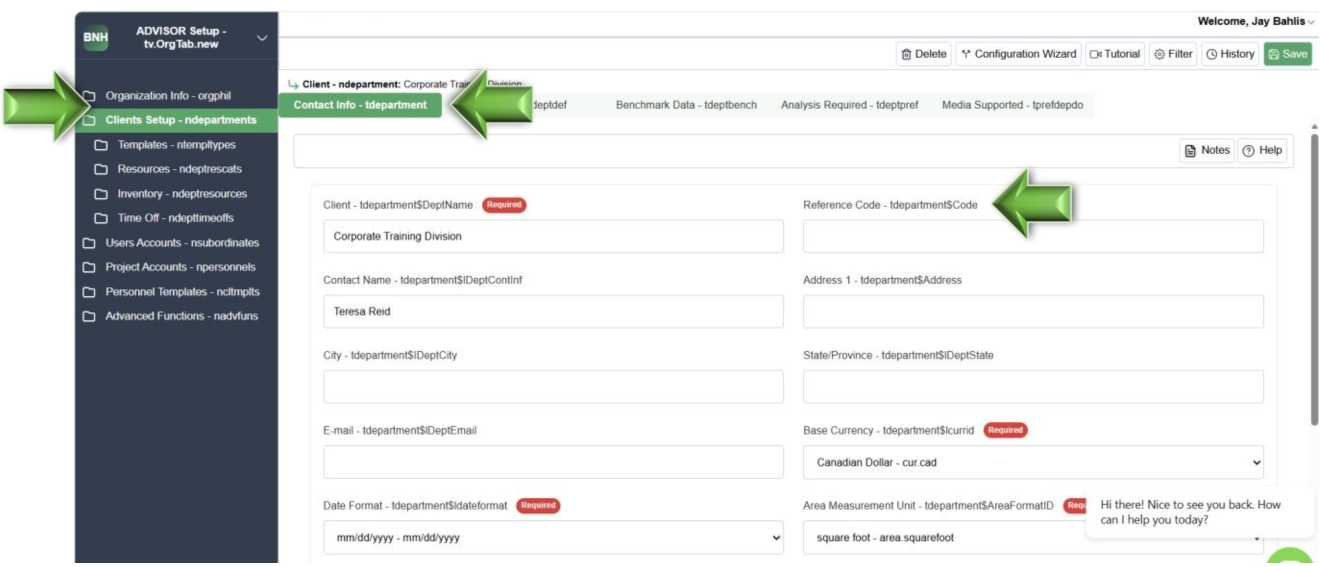
The next step is to identify the Node, Tab, Label, or Answer ID. Use ADVISORs built-in display option to show the IDs for each element so you can locate the correct taxonomy entry as follows:
**Step 2:** Open [**Personalize**], select the **Preferences** node, and then click the [**Options**] tab.
**Step 3:** Place checkmark next to the **Display ID** field
**Step 4:** Click [**Save**].
**Step 5:** When ADVISOR prompts you to reload, click [**OK**] to apply the changes.



You will now see the ID for each Node, Tab, Label, Response, and Message shown directly after its text. For instance, Organization Info displays the ID "orgphil", Clients Setup shows "ndepartments", the Contact Info tab shows "tdepartment", and the Reference Code label shows "tdepartment$Code".



**Step 6**: To update the text for any Node, Tab, Label, Dropdown Option, or Report Header, open the relevant properties file:

**nodes**_en_US_xxx.properties
**tabs**_en_US_xxx.properties
**labels**_en_US_xxx.properties
**answers**_en_US_xxx.properties or
**messages**_en_US_xxx.properties

Find the ID you want to change and edit the text.

If the ID is missing, simply add a new line in the format:
ID = New Text

For example, to rename the **Risk Analysis** folder to **Risk Assessment** in *English (Version 1)*, add this line to nodes_en_US_dndattr.properties:

experiences=Risk Assessment

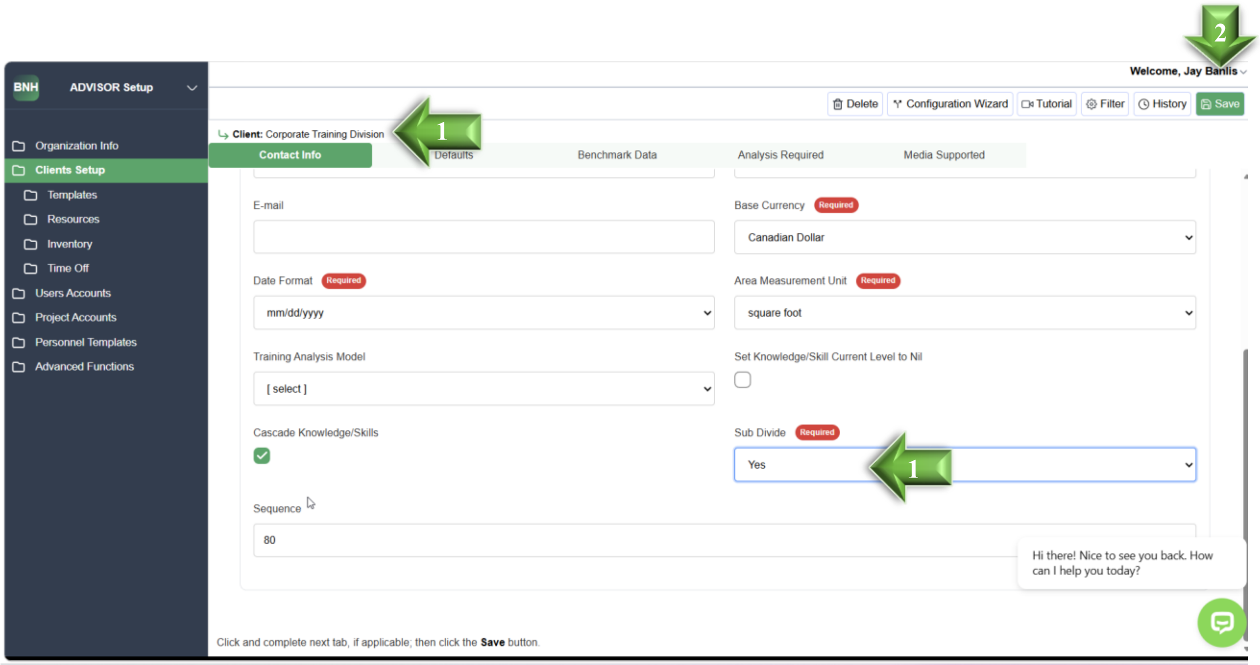
**Step 7**: To apply your changes, you'll need to stop and restart the web server (Tomcat, for example). This reloads the updated files and makes the new taxonomy visible.

**Step 8**: To complete the setup, select **English (Version 1)** from the **Language** field located under **Preferences** in the **Personalize** tab, as outlined in Section 2.6.

## 2.8 Organize Clients

ADVISOR is designed to reflect the structure of your Client's organization. You can create multiple Clients and, within each one, add Divisions to match the organizational hierarchy. Assigning Users to specific Clients or Divisions allows you to easily manage what information each User can access. To create a Division for a Client, proceed as follows:

**Step 1:** Select the **Client** you want to configure, and change the **Sub Divide** field to **Yes**.
**Step 2:** After setting *Sub Divide* to **Yes**, click **Save**. The **Divisions** folder will then appear under the **Clients Setup** node.





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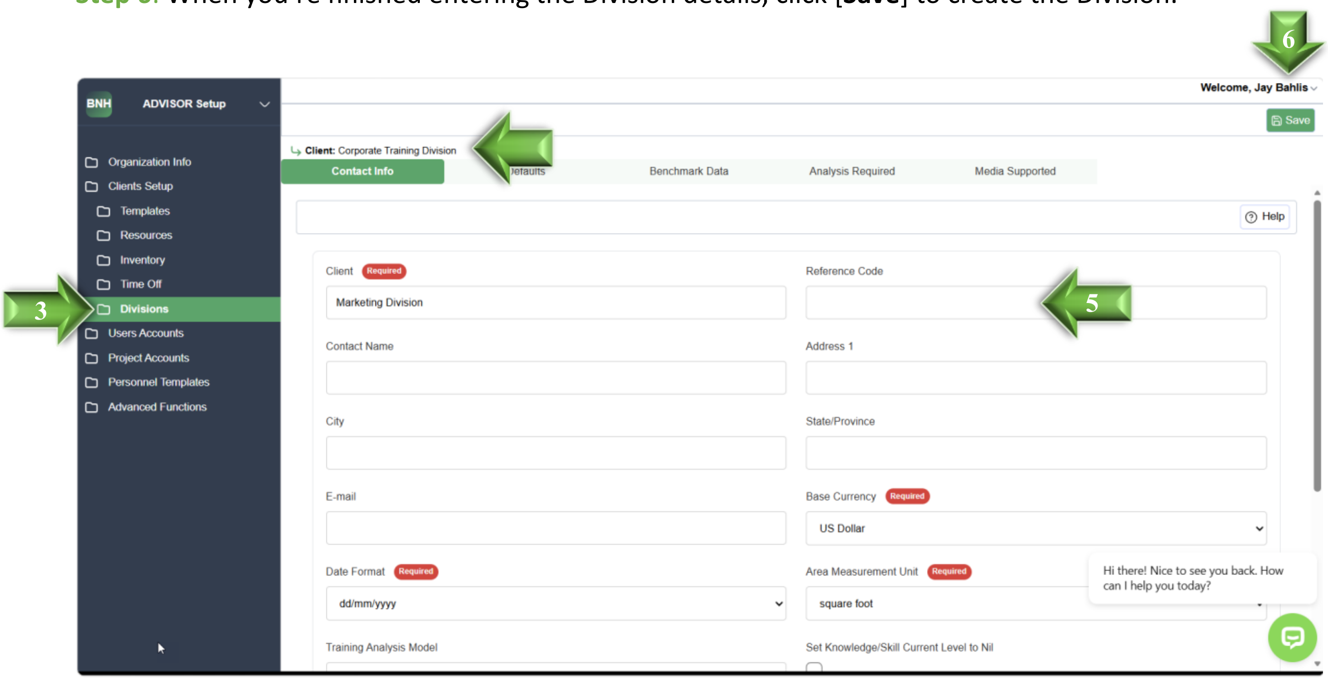
**Step 3:** Click on the **Divisions** folder.
**Step 4:** Click on [**Add**].
**Step 5:** Enter the Division Title, Contact Name, and all other relevant details. For more information on each field, see Sections 2.1 to 2.5.
**Step 6:** When you're finished entering the Division details, click [**Save**] to create the Division.




**Implication:**

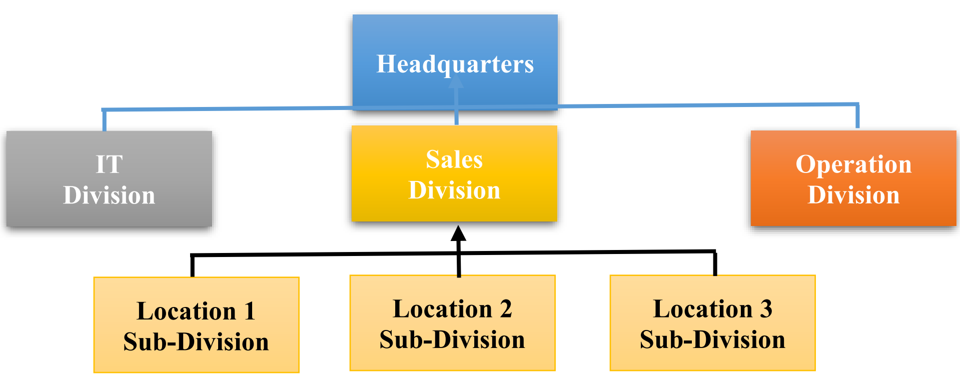
➢ When a User is assigned to a Client, they can use the **Reports** module to compile, compare, and view results from every Division under that Client. This does not give them direct access to the underlying Job or Course Analyses – they can see the results, but they cannot edit the analysis itself

Examples:

❑ A **CLO** assigned to **Headquarters** can generate reports across all Divisions (IT, Sales, Operations) and all Sub-Divisions (Location 1–3)

❑ A **Sales Director** assigned to the **Sales Division** can generate reports for Sales and its Sub-Divisions (Location 1–3).

❑ A **Sales Manager** assigned to **Location 1** can generate reports only for Location 1.



## 2.9 Configure Organization

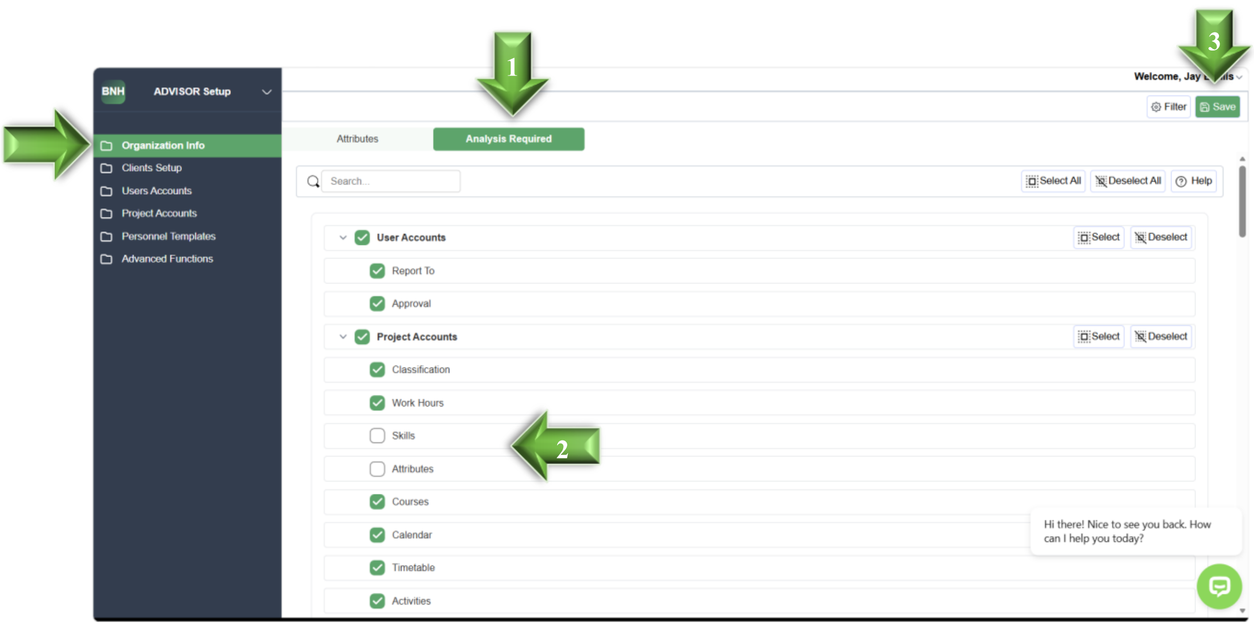
**Step 1:** To define what data should be collected and which analyses ADVISOR will perform, open the Organization Info node and select the [**Analysis Required**] tab.

**Step 2:** Choose which items should be included.

All options start selected. If certain data or analyses are not needed, you can deselect them. ADVISOR will then hide the related nodes for Users, helping simplify the interface and reduce the effort required to complete the analysis.

**Example:** If team members Skills or Attributes are not required for your analysis, simply deselect those items. Should you need them later, just select them again and click [**Save**].

**Implication:** Any deselected nodes will be hidden for all Users. In this case, Skills and Attributes would no longer appear under Project Accounts, making the workflow more efficient. Because these settings apply system-wide, review them thoughtfully.




**Step 3:** When you're finished selecting the required options, click [**Save**] to apply and store the Organization's configuration.

## 2.10 Final Notes

Since the way you configure Clients and the Organization directly affects how data is collected, analyzed, and interpreted, it's important to plan this setup thoughtfully. Consider the following questions to guide your decisions:

- How many Clients are supported, and who oversees each one?
- What delivery options does each Client use or consider?
- What data and analyses does each Client need?
- How many days per year and hours per day do individuals typically work? What fringe benefits factor applies?
- Which reports or insights will help leaders make stronger training decisions?

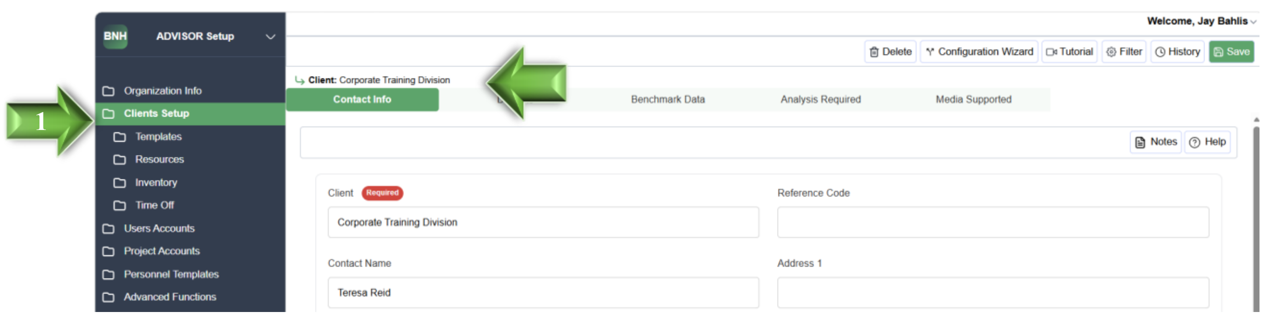
# Chapter 3: Setup Templates & Resources

## 3.1 Setup Templates & Resources

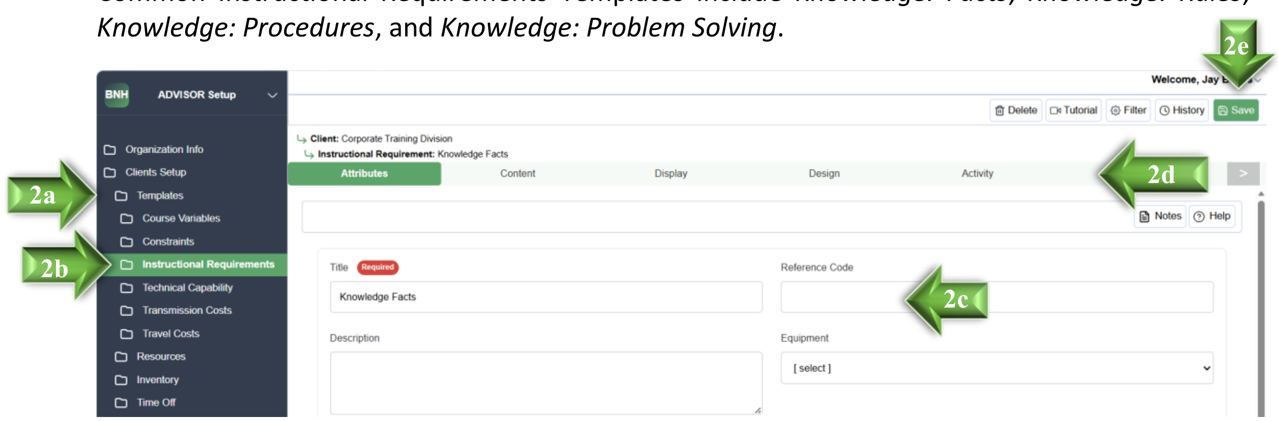
To make course analysis faster, more consistent, and more accurate, ADVISOR enables you to create and share personnel, resources, and instructional design templates. This also helps determine the personnel and resources needed for training and supports tracking their allocation and utilization across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

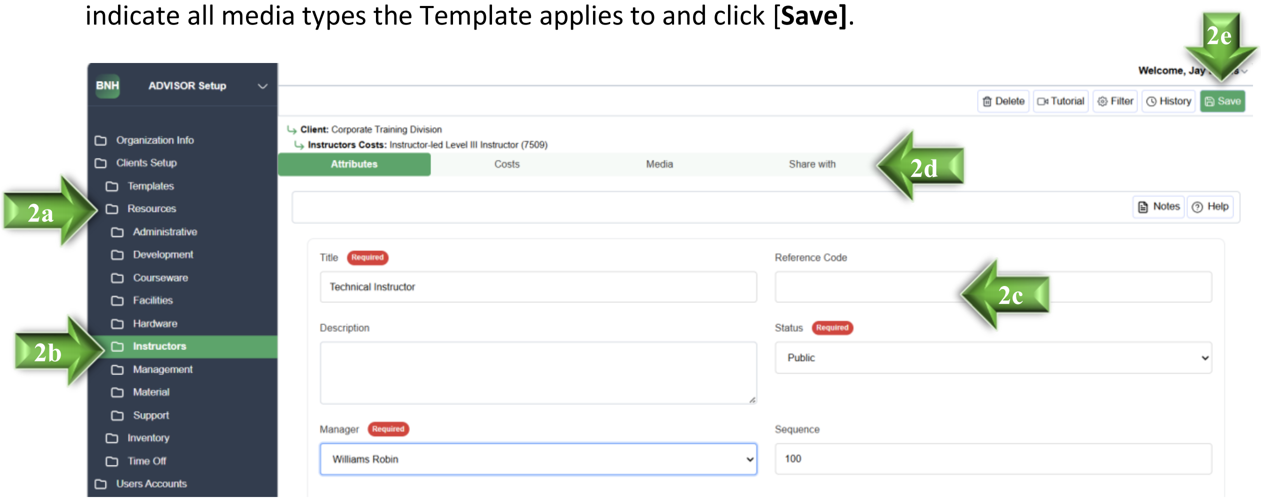
**Step 1b**: To create personnel – developers, instructors, administrators, managers, support staff – or to add resources like facilities, equipment, or simulators, click on the **Resources** folder.




**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*.



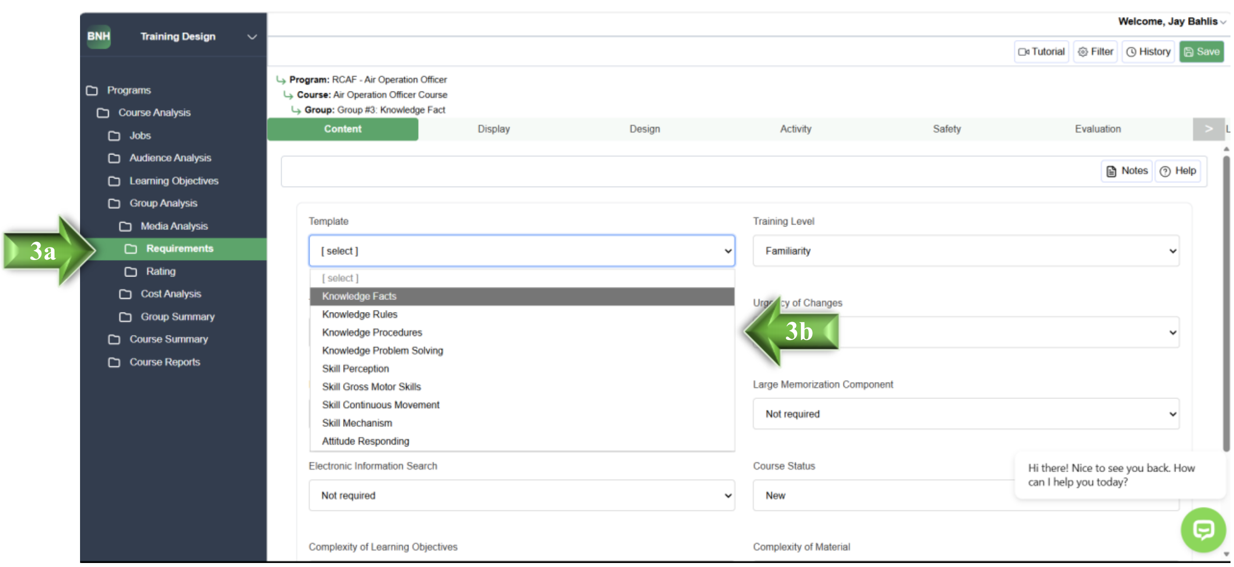
To configure pilot or technician instructors, click on the Instructors folder under Resources, click [**Add**], and complete the fields in the [**Attributes**] and [**Costs**] tabs. Then, under the [**Media**] tab, indicate all media types the Template applies to and click [**Save**].



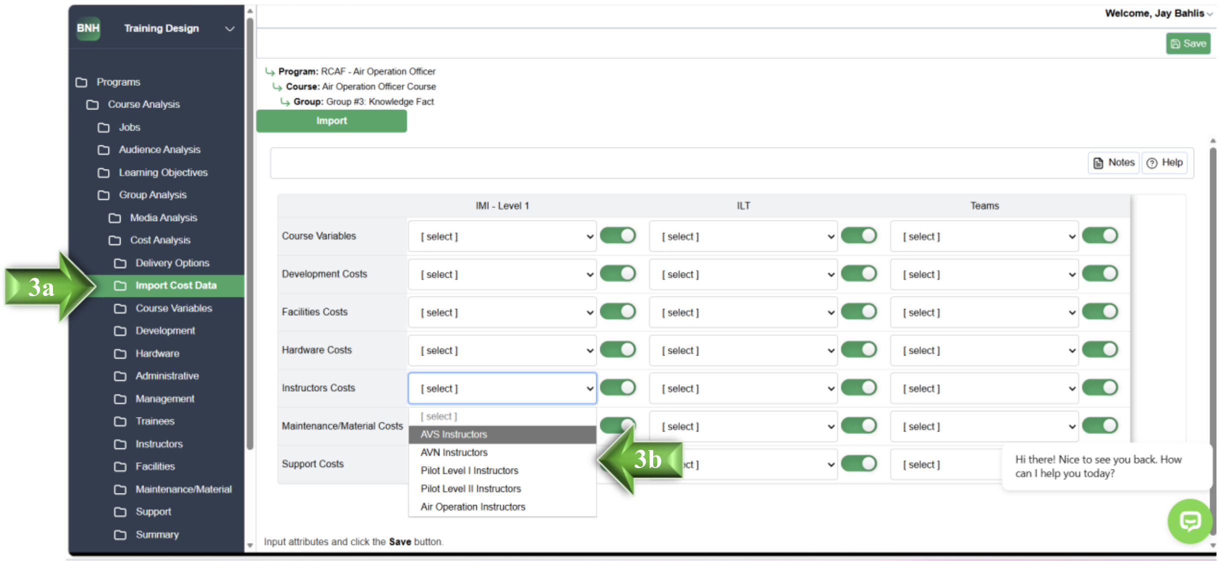

Notes:

- 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.



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

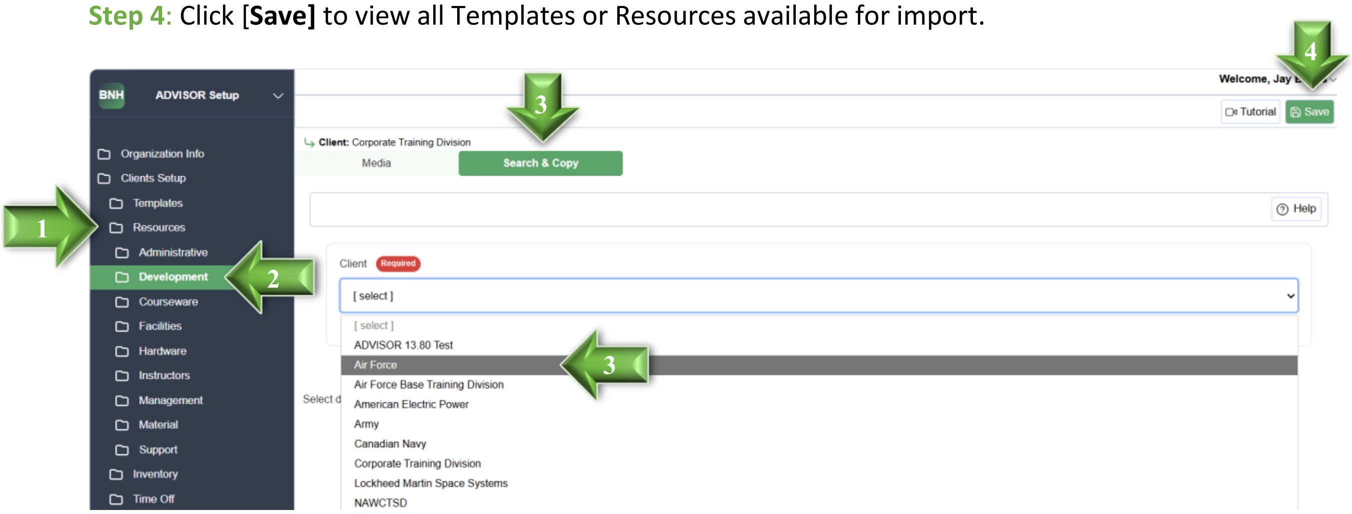
Copying Templates or Resources from another Client is simple:

**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**.

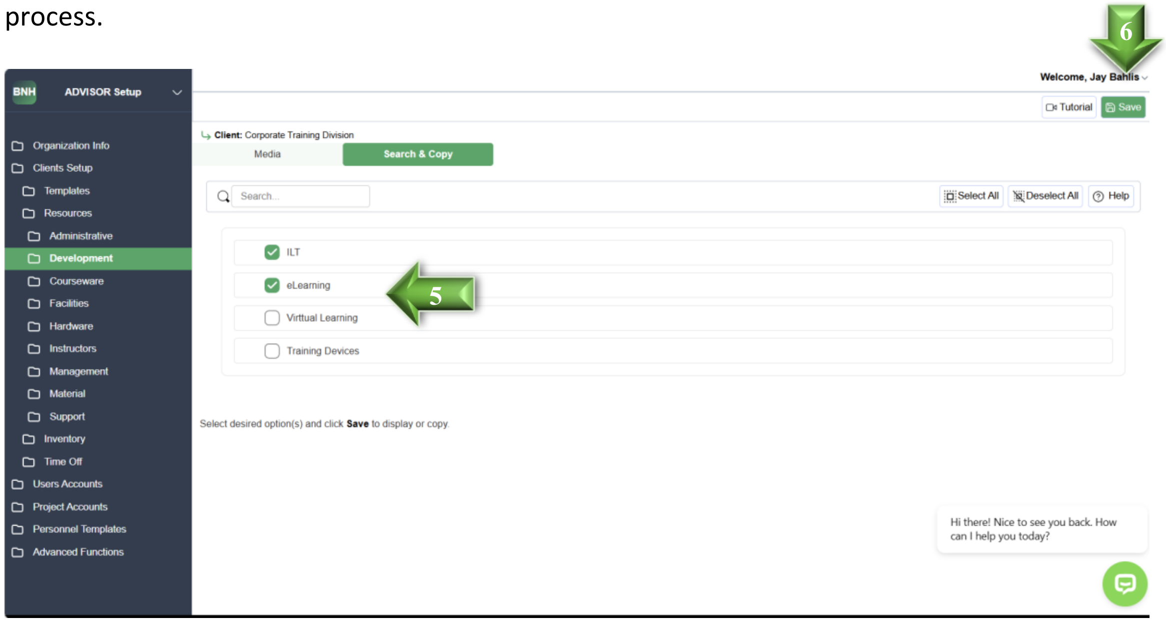
**Step 3:** Click on the [**Search & Copy**] tab and select the Client whose Templates you want to copy.

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

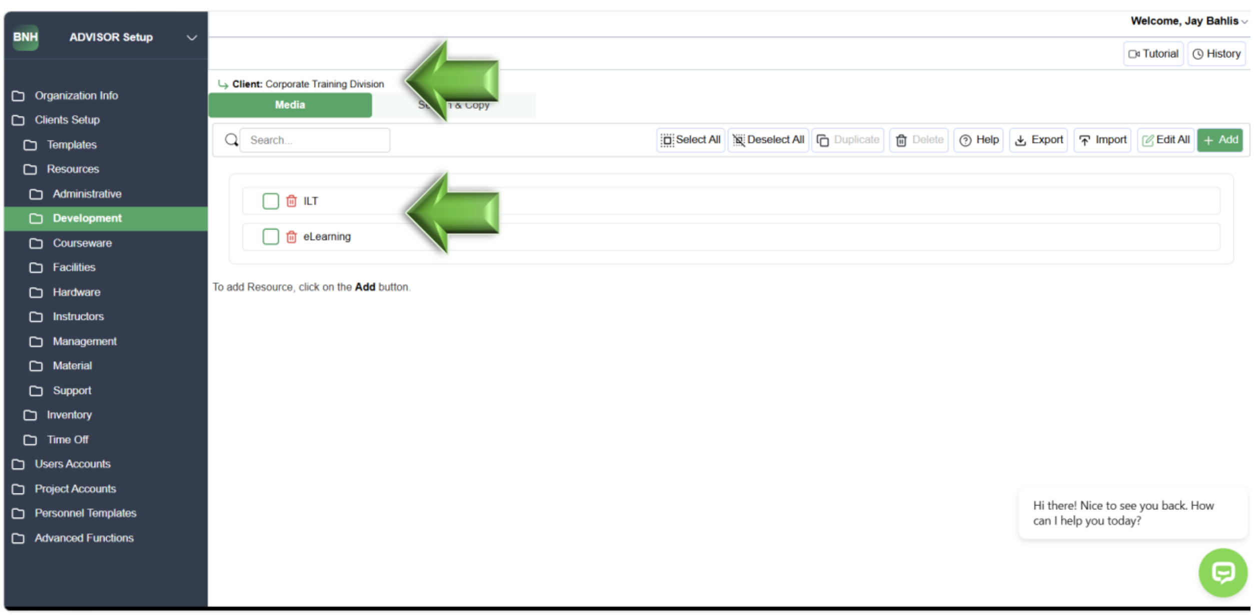


**Step 5:** Choose the Templates or Resources you want to copy from the list.

**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.



# Chapter 4: Setup User Accounts

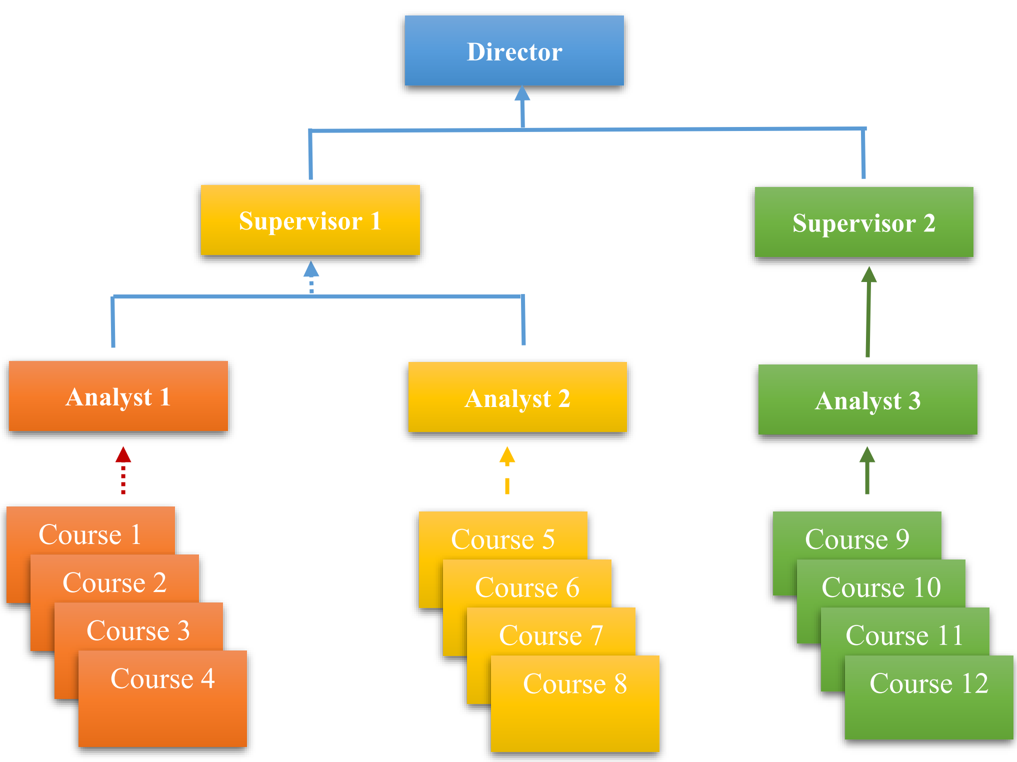
## 4.1 Introduction

ADVISOR Enterprise allows you to control quality, streamline work, and preserve security by assigning privileges according to each User's role and responsibilities. Instructional Designers can be given Job Task and Media Analysis; Financial Analysts can manage Personnel and Resource Cost Templates; Training Managers can generate reports; and Executives can access dashboards. Privileges apply only to the Client(s) a User is assigned to – so an Instructional Designer assigned to School A can work only on School A's jobs and courses.

Collaboration is easy. Users can share their analyses and templates with colleagues for review, comments, or edits by clicking on the [**Share with]** tab, checking the appropriate names, and clicking [**Save**]. Each analysis is automatically shared with the User's supervisor(s).

Managers at higher levels can use the **Reports** module to compile, compare, and view results from all subordinate analyses. This allows oversight without granting editing access. For example:

- Analyst 1 can report on Courses 1–4.
- Supervisor 1 can report on Courses 1–8 from Analysts 1 and 2.
- The Director can report on Courses 1–12 from Analysts 1, 2, and 3, but cannot open or modify the courses themselves.



## 4.2 Setup New User Accounts

### Create User Accounts

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

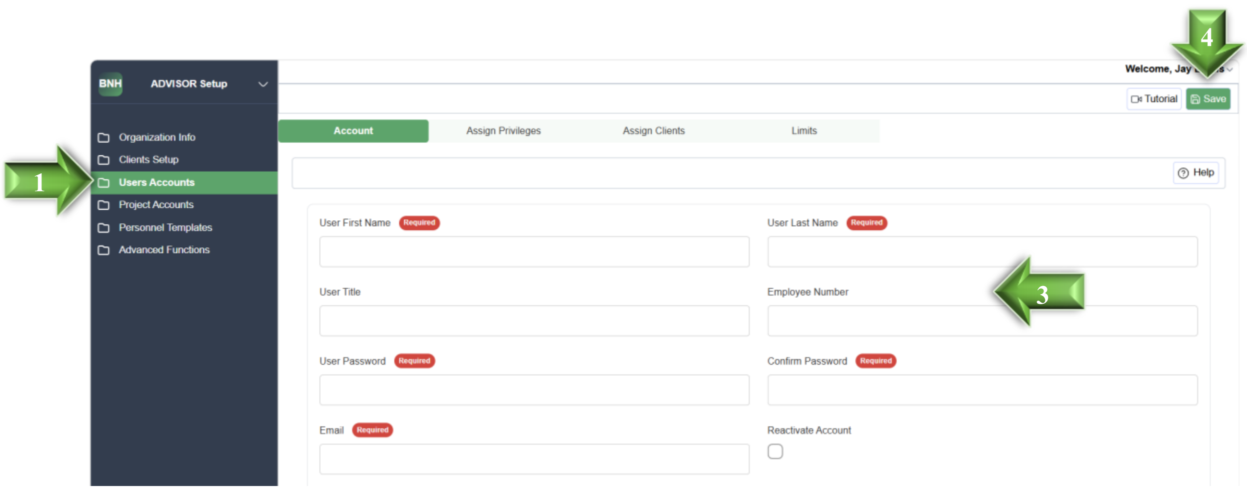
**Step 2**: Click on [**Add**] to begin setting up the new User.

**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**].
- 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

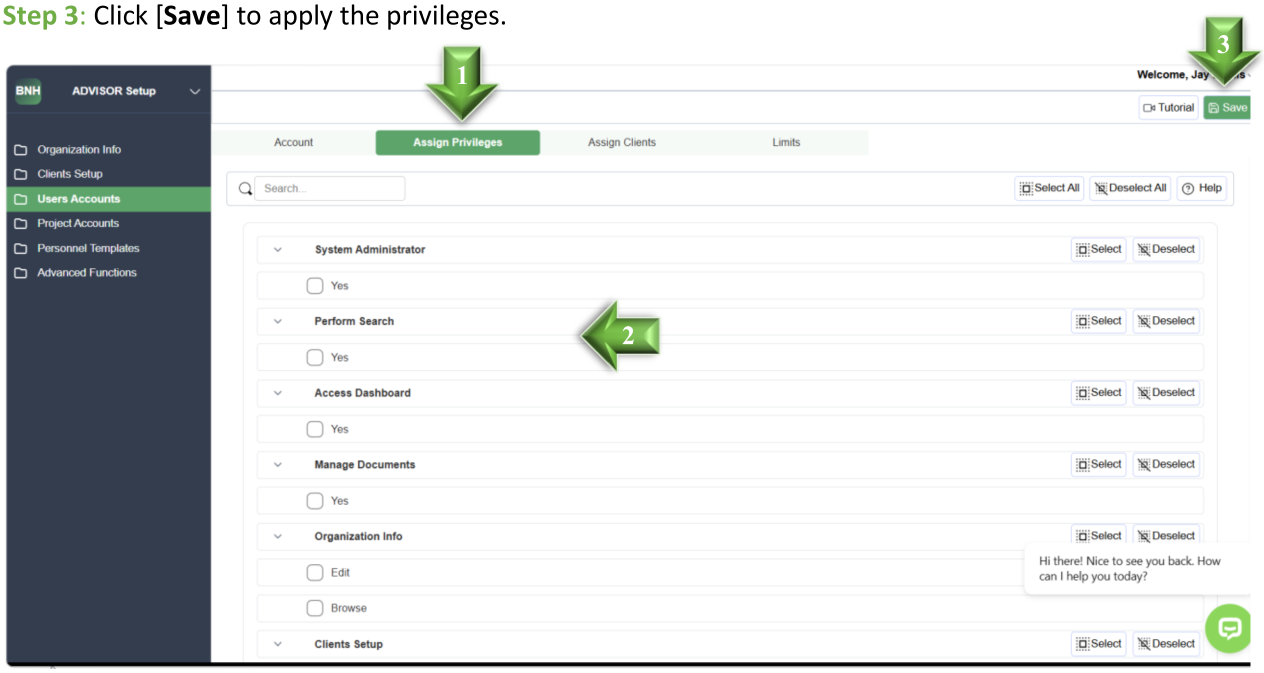
To define what the User can or cannot do:

**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.

**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.

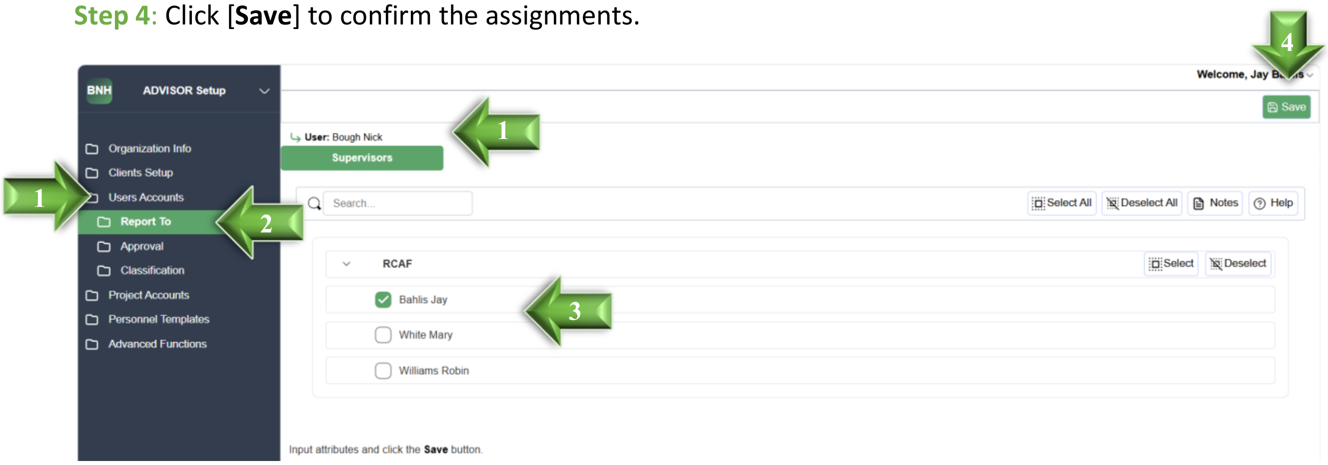
**Step 2**: Click [**Save**] to complete the Client assignment.

**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. |

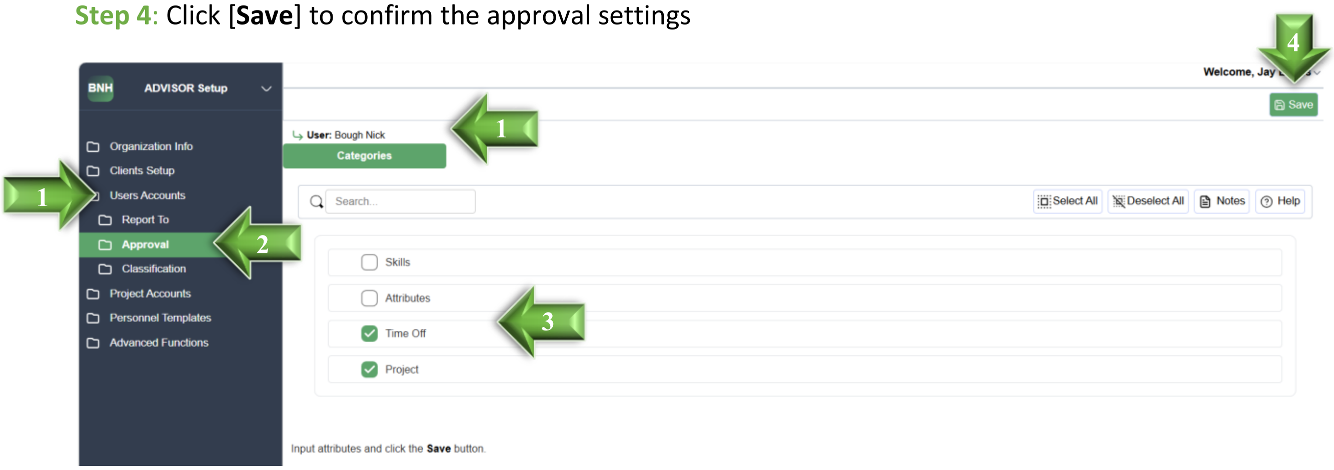
**Specify User's Supervisors.** To specify the User's Supervisor(s):
Step 1: Click on the User Account node followed by the User's name.
Step 2: Click on the Report To node.
Step 3: For every Client the User supports, check the boxes next to the names of the Supervisor(s).
Step 4: Click [**Save**] to confirm the assignments.




**Implication:**

- Any data a User collects or analyzes is automatically shared with their Supervisor(s). This allows Supervisors to review the work, provide comments, and make edits when needed. For instance, if James Brown supervises Mike Smith, James can view and update the courses Mike has analyzed. ADVISOR maintains full accountability by recording every change – capturing both the User who made the change and the exact time it occurred.

**Approvals Needed.** To specify which actions require Supervisor's approval:
Step 1: Click on the User Account node followed by the User's name.
Step 2: Click on the Approval node.
Step 3: Check the boxes next to the items that should require Supervisor sign-off.
Step 4: Click [**Save**] to confirm the approval settings

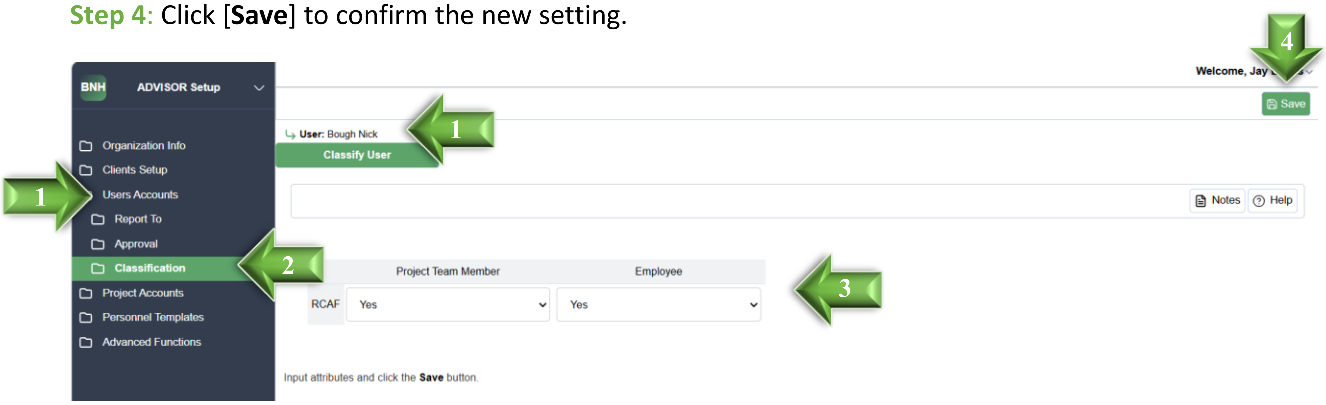



**Implication:**

- Whenever a User adds or updates an item that requires approval, ADVISOR automatically sends an email to the Supervisor. This keeps Supervisors informed and able to respond quickly.

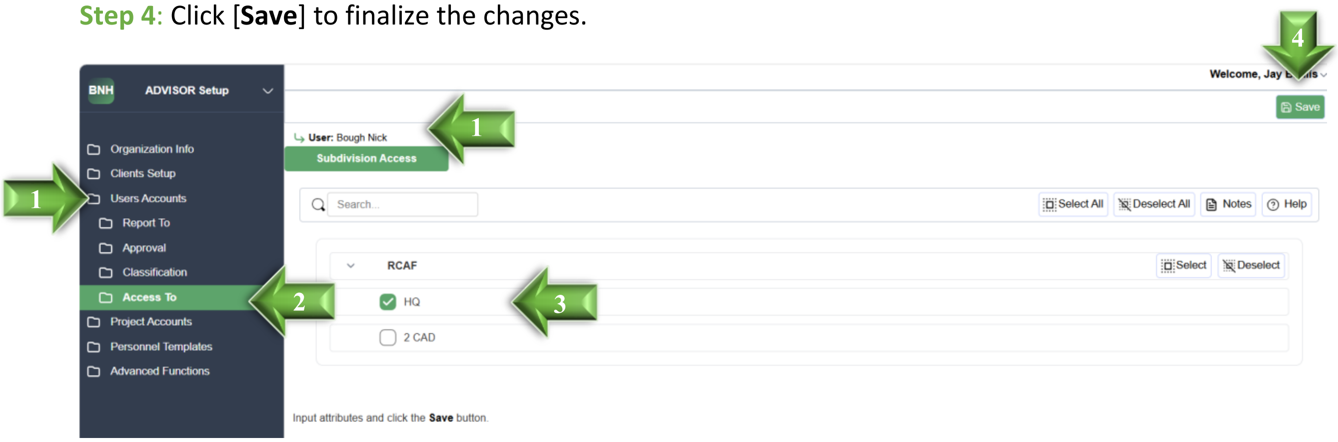
**Employee & Project Team Member Classification.** By default, every new User is treated as an Employee of the Client/Division they support and as part of the Project Team. This allows them to be linked to Jobs/Roles under analysis and to receive Tasks assigned within a Project. If the User should not be treated as an Employee or Project Team member:

Step 1: Click on the User Account node followed by the User's name.
Step 2: Click on the Classification node.
Step 3: For every Client the User supports, update the classification field to **No** if the User should not be considered an Employee or part of the Project Team for that Client.
Step 4: Click [**Save**] to confirm the new setting.




**Limit User's Access to Divisions.** Users are initially granted access to every Division under the Clients they support. If you need to restrict this access:

Step 1: Click on the User Account node followed by the User's name.
Step 2: Click on the Access To node.
Step 3: Clear the checkboxes for any Divisions the User should not be able to view or work with.
Step 4: Click [**Save**] to finalize the changes.



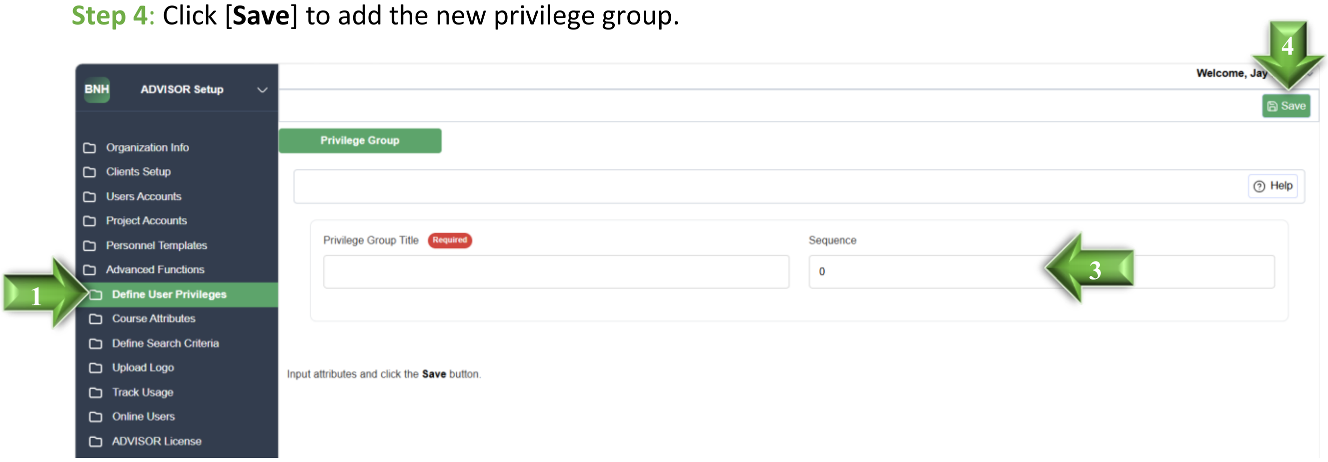

**Implication:**

- By default, Users have reporting access to every Division under the Client(s) they support. This means they can compile, compare, and view results across all Divisions in the **Reports** tab. For instance, if Mike Smith supports the **Army** and has permission to generate Training Requirements reports, he can forecast training needs for both **East Coast** and **West Coast** courses. He can compile the results, even though he cannot open or edit the underlying Course Analysis. If you remove access to the **West Coast** Division, Mike will no longer be able to include that Division's data in his reports.

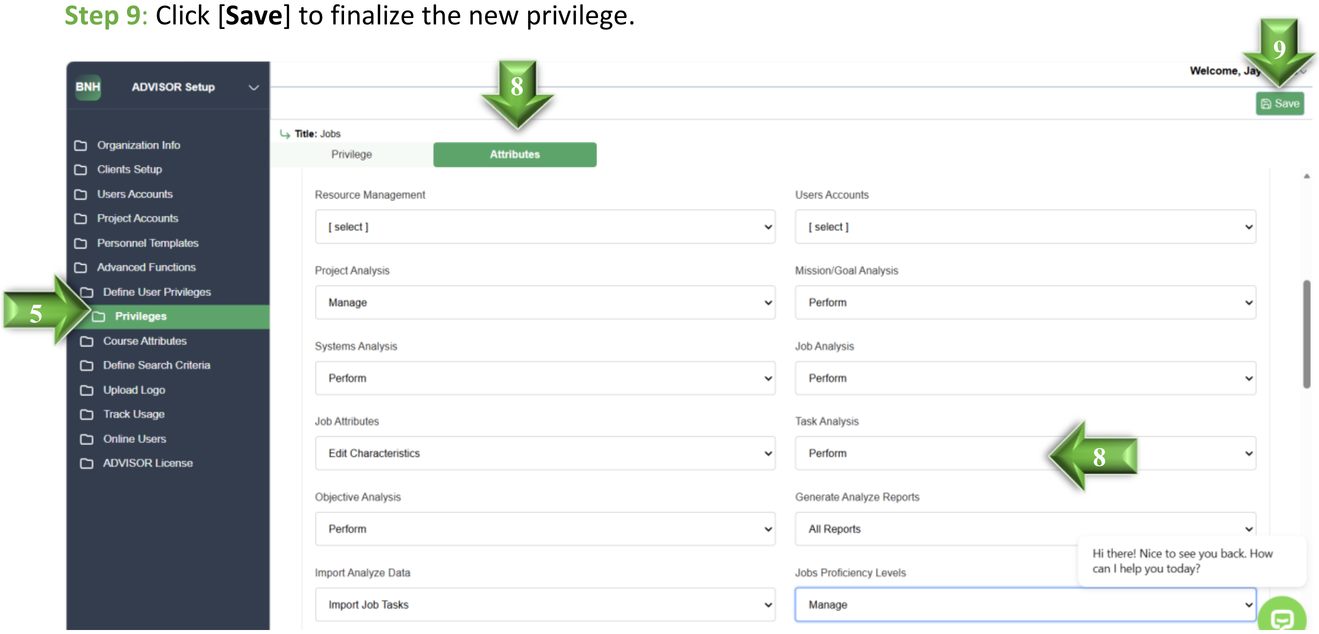
## 4.3 Define User Privileges

Under **Advanced Functions**, System Administrators can define User Privileges and create standardized privilege groups for specific jobs or roles. This helps ensure consistency across the organization

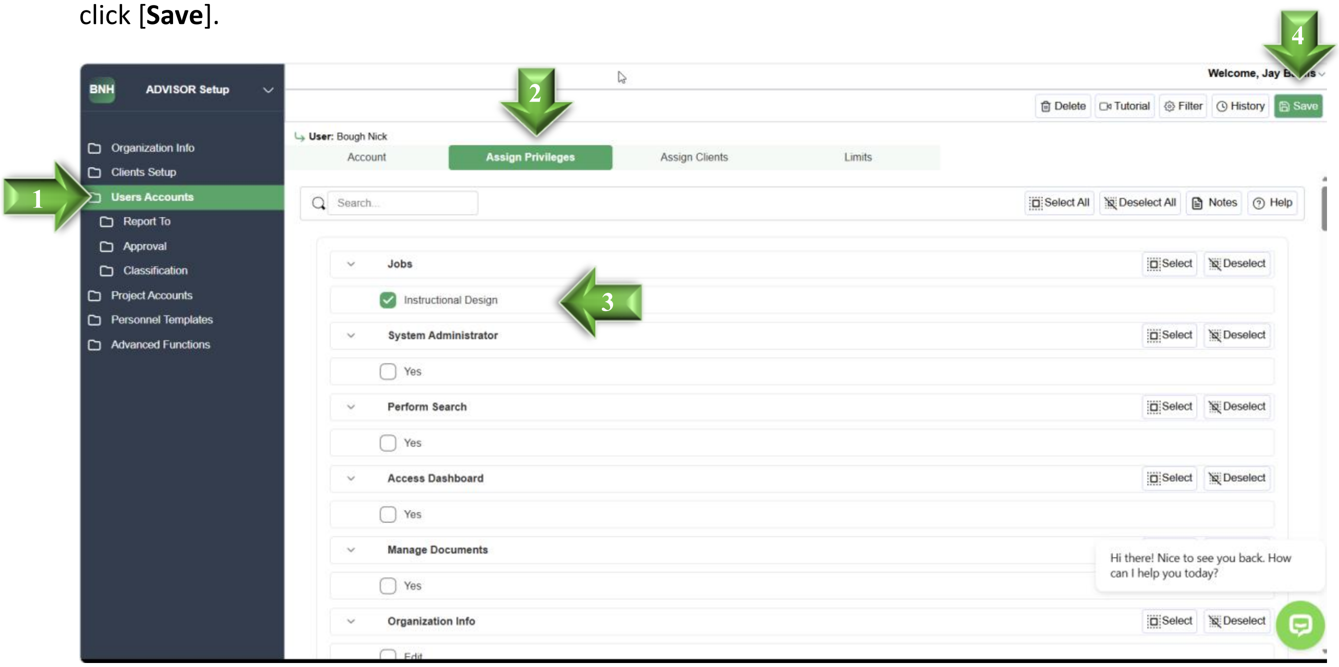
**Step 1:** Click on the **Define User Privileges** folder under **Advanced Functions**.
**Step 2:** Click [**Add**].
**Step 3:** Provide a title for the privilege group (e.g., *Jobs*) and set its display order
**Step 4:** Click [**Save**] to add the new privilege group.




**Step 5:** Click on the **Privileges** folder under the (**Jobs**) node.
**Step 6:** Click [**Add**].
**Step 7:** Enter a Privilege title (e.g., Instructional Designers) and set its display order.
**Step 8:** Click on the **Attributes** tab and choose the attributes that apply to Instructional Designers.
**Step 9:** Click [**Save**] to finalize the new privilege.

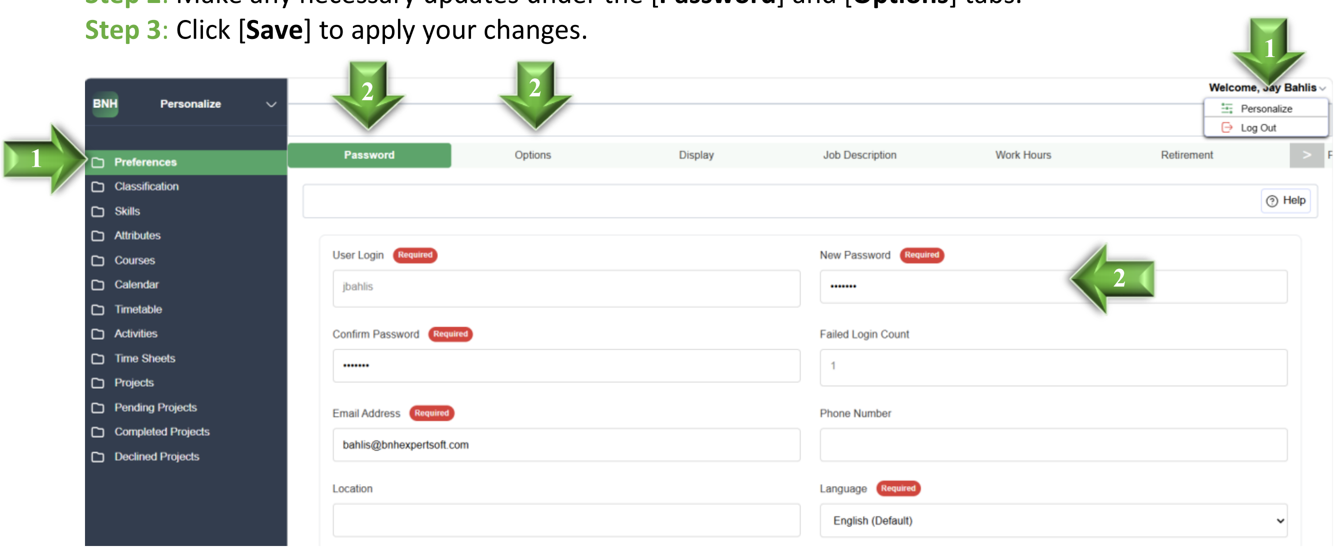


Once the *Instructional Designer* privilege has been created, you can assign it to any User. Select the User under User Accounts, go to the [**Assign Privileges**] tab, check **Instructional Designer** privilege, and then click [**Save**].




## 4.4 Manage Preferences

Users may adjust their personal settings – including User ID, Password, Taxonomy, and Items per Page - to suit their needs. To update personal preferences:
Step 1: Click on the Preferences node, under Personalize.
Step 2: Make any necessary updates under the [**Password**] and [**Options**] tabs.
Step 3: Click [**Save**] to apply your changes.




**Notes:**

- Users may record the Skills and Attributes they possess by updating the Skills and Skills nodes.
- For more information on personal preference settings, refer to **Annex B**.

## 4.5 Final Notes

Privileges play an important role in aligning each User's responsibilities with the functions they are allowed to perform in ADVISOR. For instance, Instructional Designers might receive privileges for Mission Analysis, System Analysis, and Job Tasks Analysis; Financial Analysts may be allowed to create and manage Cost Templates; and Training Managers may be permitted to generate Training Requirements forecasts. Restricting privileges to what each User truly needs helps maintain data integrity and keeps ADVISOR easy to use. Because of this, privilege assignments should be thoughtfully planned.

When assigning User Privileges, it helps to think through the responsibilities of each team member. Consider questions such as:

- Who will serve as the System Administrator?
- Who is responsible for managing Clients?
- Who should create and update Cost Templates?
- Who will oversee User Accounts?
- Who will manage Course Classification?
- Who will perform Mission, System, Competency, Job Task, and Knowledge/Skill Gap Analysis?
- Who will handle Media Analysis?
- Who will conduct Cost and Performance Analysis?
- Who will set up project plans and track resource utilization?
- Who will forecast training program costs?
- Who requires access to Reports?

Thinking through these questions ensures privileges are assigned thoughtfully and consistently.

Don't forget that you can access context-sensitive help at any time by clicking [**Help**], and you can watch short video clips on how to perform key functions by clicking [**Tutorial**]. After ADVISOR is configured, you're ready to start your Analysis. For more guidance, explore the Training Analysis materials and other Step-by-Step/User Guides at: https://bnhexpertsoft.com/user-guides-version-12-0/.

**Enjoy!**

# Annex A – User Account Privileges

Below is a brief overview of User Privileges. Keep in mind that you may not have access to every privilege; ADVISOR will only display those that correspond to the modules your organization has licensed. You may also create additional privileges under **Define Users Privileges** in the **Advanced Functions** folder.

| Privilege | Description |
|---|---|
| **Roles** | ➢ **System Administrator.** This privilege enables Users to configure ADVISOR, assign privileges, manage User Accounts, and address performance issues. Users granted the **System Administrator** privilege have full access to all accounts, clients, and analysis functions.<br>➢ **Director/Executive.** This privilege allows Users to view all data that has been shared with them and produce the corresponding reports.<br>➢ **Project Manager.** This privilege enables Users to edit all ISD and financial data, generate reports, configure users, skills, and attributes, manage activity and course classification, and import and export XML data. In other words, users can perform the combined duties of a Senior Instructional Designer and a Financial Analyst.<br>➢ **Senior Instructional Designer.** This privilege enables Users to modify all instructional system design data - both course-level and project-wide - and generate the associated reports.<br>➢ **Instructional Designer.** This privilege allows Users to update course-level ISD data and produce the related reports. Project-wide ISD data remains restricted and cannot be accessed or edited by Users with this privilege.<br>➢ **Financial Analyst.** This privilege allows Users to modify all project-level financial data. Report access and report generation are restricted for Users assigned this privilege.<br>➢ **Reviewer/Subject Matter Expert.** This privilege enables Users to review and comment on any data that has been shared with them. Access to reports and the ability to generate reports are not permitted under this privilege. |
| **Perform Search** | This privilege enables Users to search, copy, and reuse data across ADVISOR. Selecting **Yes** allows Users to access Search tabs within the functions they are permitted to use. For instance, a User with Job Analysis privileges will see Search tabs under Task Analysis and Performance Objectives. If the privilege is not granted, all Search tabs are hidden. |
| **Access Dashboard** | This privilege enables Users to open the **Dashboard** tab and review key performance indicators across Clients. Selecting **Yes** provides access to metrics including Training Alignment, Gaps and Duplications, Training Costs, Personnel and Resource Requirements, Cost Drivers, Time to Competency, Utilization/Bottlenecks, and Media Recommendations. Users can also drill down into each metric for deeper insight. |

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| **Manage Documents** | This privilege enables Users to upload documents into ADVISOR. Selecting **Yes** allows Users to upload files and create Meta Tags, making it easier to organize and retrieve documents later. |
| **Organization Info** | This privilege controls access to the **Organization Info** node, where Users can view or update organization contact details and default settings. You may assign:<br>➢ **Edit.** Intended for System Administrators. Grants full editing rights, including updating contact information and configuring default Date Format, Base Currency, and Language.<br>➢ **Browse.** Intended for Users who only need visibility into contact information and settings. They can view the data but cannot make changes. |
| **Clients Setup** | This privilege controls access to Client and Division setup. You may assign:<br>➢ **Edit.** Intended for training directors, managers, and analysts. Grants the ability to create and configure Clients, including contact details, currency and date settings, analysis models, default values, benchmark data, delivery options, and required analyses. Users can only manage Clients they created or are assigned to.<br>➢ **Browse.** Intended for Users who only need visibility into Client settings. They can view Client information but cannot make changes, and only for Clients they are assigned to. |
| **Course Templates/Resources** | This privilege controls access to creating and managing instructional design, personnel, and resource templates used across multiple Courses. You may assign:<br>➢ **Edit All.** Intended for training/project managers, instructional designers, and analysts. Grants full access to create and manage both Instructional Design and Financial Templates/Resources, limited to Clients the User is assigned to.<br>➢ **Edit Instructional Templates.** Intended for training managers and instructional designers. Allows creation and management of Instructional Design Templates for assigned Clients.<br>➢ **Edit Financial Templates.** Intended for training/project managers and financial analysts. Allows creation and management of Financial Templates and Resources for assigned Clients.<br>➢ **Browse.** Intended for Users who only need visibility into Templates and Resources. They can view, but not edit, and only for Clients they are assigned to. |
| **Risk Analysis** | This privilege governs access to readiness assessments for new learning technologies. You may assign:<br>➢ **Edit.** Intended for training managers and analysts. Grants the ability to evaluate risks and estimate the cost of required interventions, such as staff retraining, communication planning, and policy updates. Users can only perform assessments for Clients they are assigned to. |

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| | ➢ **Browse.** Intended for Users who only need visibility into readiness assessments. They can view, but not modify, risk analysis for their assigned Clients. |
| **Inventory** | This privilege controls access to Client Inventory setup, such as facilities, equipment, and hardware. You may assign:<br>➢ **Edit.** Intended for project and resource managers. Grants the ability to define Inventory items, update attributes, set availability, manage maintenance schedules, and assign resource managers. Access is limited to Clients the User is assigned to.<br>➢ **Browse.** Intended for Users who only need visibility into Inventory details. They can view attributes but cannot make changes, and only for their assigned Clients. |
| **Manage Time Off** | This privilege controls access to configuring weekends, holidays, and other time-off periods that are automatically blocked from all project calendars. Selecting **Yes** grants Users the ability to set up Client-specific weekends, holidays, and time-off dates. Users can only configure these settings for Clients they are assigned to. Intended for system administrators and training/project managers. |
| **Users Accounts** | This privilege governs access to setting up and managing User Accounts. You may assign:<br>➢ **Edit.** Intended for system administrators and training/project managers. Grants the ability to create User Accounts, assign privileges, specify supported Clients, and define reporting relationships. Users (other than system administrators) can only assign privileges they already hold and may only manage accounts for Clients they support.<br>➢ **Browse.** Intended for Users who only need visibility into account information. They can view, but not modify, User Accounts for the Clients they are assigned to. |
| **Edit Master Skills List** | This privilege enables Users to establish a shared classification of Skills required or held by team members. Assigning **Yes** allows analysts and training/project managers to define Skills – understood as abilities demonstrated consistently over time, whether mental or physical, and developed through education, training, or practice.<br><br>**Note:** When more than one User has this privilege, all assigned Users can view and update each other’s entries. |
| **Edit Master Attributes List** | This privilege enables Users to establish a shared classification of Attributes needed or held by team members. Assigning **Yes** allows analysts and training/project managers to define Attributes, understood as characteristics such as citizenship or security level.<br><br>**Note:** When more than one User has this privilege, all assigned Users can view and update each other’s entries. |

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| **Edit Master Activities List** | This privilege enables Users to establish shared classifications for activities performed by team members. Assigning **Yes** allows system administrators and training/project managers to define categories such as vacation, training, and holidays.<br><br>**Note:** When more than one User has this privilege, all assigned Users can view and update each other's entries. |
| **Edit Course Classification** | This privilege enables Users to create shared Course attributes (meta tags) that support targeted searches and filtering. Assigning **Yes** allows executives, training leaders, managers, and analysts to define Course classifications – such as region, competency, or job function – within the **Course Attributes** section of **Advanced Functions**.<br><br>**Note:** When more than one User has this privilege, all assigned Users can view and update each other's entries. |
| **Upload Logo** | This privilege enables Users to add logo to ADVISOR. Selecting **Yes** grants system administrators access to the **Upload Logo** node within **Advanced Functions**, where they can upload a logo that will appear in MS Word reports produced by ADVISOR. |
| **Access Track Usage** | This privilege enables Users to monitor overall system usage. Assigning **Yes** allows system administrators to track the number of Courses created, active Users, and time spent in ADVISOR. It grants access to the **Track Usage** section within **Advanced Functions**. |
| **Request Management** | This privilege governs access to managing and reviewing requests within the Request Management module.<br>➢ **Edit.** Intended for project managers, training leaders, instructional designers, and analysts. Grants the ability to create new requests, build project plans, assign resources, and monitor progress.<br>➢ **Browse.** Intended for Users who only need visibility into requests. They can view, but not change, any requests shared with them. |
| **Needs Assessment** | This privilege governs access to the Needs Assessment module, where Users analyze performance gaps and determine appropriate interventions.<br>➢ **Edit.** Intended for instructional designers and analysts. Grants the ability to examine mission or task gaps, uncover root causes, and recommend viable solutions.<br>➢ **Browse.** Intended for Users who only need visibility into Needs Assessment results. They can view, but not modify, scope analyses for Projects shared with them. |
| **Project Analysis** | This privilege governs access to the Training Needs Analysis functions available under the Training Analyze module.<br>➢ **Edit.** Intended for training managers, instructional designers, and analysts. Grants the ability to create and configure analysis Projects, specify required data, and determine the analyses to be conducted. |

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| | ➢ **Browse.** Intended for Users who only need visibility into the analysis results. They can view, but not modify, Projects shared with them. |
| **Mission/Goal Analysis** | This privilege governs access to the Mission Analysis and Project Reports sections under the Training Analysis module.<br>➢ **Edit.** Intended for instructional designers and analysts. Grants the ability to articulate and prioritize Project missions/goals, describe desired performance, and evaluate how each mission affects parent units.<br>➢ **Browse.** Intended for Users who only need visibility into mission analyses. They can view, but not modify, the mission/goals of Projects shared with them. |
| **System/Competency Analysis** | This privilege governs access to identifying systems or competencies within a Project under the Training Analysis module.<br>➢ **Edit.** Intended for instructional designers and analysts. Grants the ability to document systems or competencies that support job performance or project outcomes.<br>➢ **Browse.** Intended for Users who only need visibility into this information. They can view, but not modify, systems or competencies shared with them. |
| **Job Analysis** | This privilege governs access to job/role identification and duty analysis within a Project under the Training Analysis module.<br>➢ **Edit.** Intended for instructional designers and analysts. Grants the ability to document duties associated with each job/role and review supporting materials, including required knowledge, skills, attitudes, job aids, policies, and tools.<br>➢ **Browse.** Intended for Users who only need visibility into job/role analyses. They can view, but not modify, analyses shared with them. |
| **Job Attributes** | This privilege governs access to defining key attributes associated with jobs and roles within a Project under the Training Analysis module.<br>➢ **Edit Financial Data.** Intended for training/project managers and financial analysts. Grants the ability to specify salary-related information, productive days, work hours, and lost opportunity costs.<br>➢ **Edit Characteristics.** Intended for instructional designers and analysts. Enables defining behavioral and capability-related attributes such as motivation, reading level, computer proficiency, and technology access.<br>➢ **Edit Attitudes.** Intended for instructional designers and analysts. Allows documenting job/role and management attitudes toward different training technologies.<br>➢ **Browse.** Intended for Users who only need visibility into job/role attributes. They can view, but not modify, financial data, characteristics, and attitudes for roles shared with them. |

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| **Task Analysis** | This privilege governs access to task identification across missions, systems, and job/role contexts under the Training Analysis module.<br>➢ **Edit.** Intended for instructional designers and analysts. Grants the ability to document tasks and their supporting knowledge/skills, job aids, policies, and tools. Users can only analyze tasks within missions, systems, or jobs/roles they have been granted access to. Without Mission or System privileges, task analysis is limited to jobs/roles.<br>➢ **Browse.** Intended for Users who only need visibility into task analyses. They can view, but not modify, analyses shared with them across missions, systems, and jobs/roles. |
| **Objective Analysis** | This privilege governs access to identifying performance and enabling objectives across missions, systems, and job/role contexts.<br>➢ **Edit.** Intended for instructional designers and analysts. Grants the ability to document objectives, determine required knowledge and skills, identify gaps, and outline training requirements. Users can only analyze objectives within missions, systems, or jobs/roles they have been granted access to. Without Mission or System privileges, analysis is limited to job/role objectives.<br>➢ **Browse.** Intended for Users who only need visibility into objective analyses. They can view, but not modify, objectives shared with them across missions, systems, and jobs/roles. |
| **Generate Training Analysis Reports** | This privilege governs access to report generation within the Training Analysis module.<br>➢ **All Reports.** Intended for instructional designers and analysts. Grants the ability to produce comprehensive Mission, System, and Job/Role reports. Users can only generate reports for missions, systems, or jobs/roles they have access to.<br>➢ **Tasks Reports.** Intended for Users responsible for analyzing tasks. Enables generating Task-focused reports across Missions, Systems, and Jobs/Roles, limited to items shared with the User.<br>➢ **Objectives Reports.** Intended for Users analyzing performance and enabling objectives. Allows generating Objective-related reports for Missions, Systems, and Jobs/Roles shared with the User.<br><br>**Note:** In all cases, Users without Mission or System privileges are restricted to generating reports under jobs/roles only. |
| **Import Training Analysis Data** | This privilege governs access to importing structured task analysis data under the Training Analysis module into ADVISOR.<br>➢ **Import Project Tasks.** Intended for instructional designers and analysts. Enables importing Project Task Analysis spreadsheets containing Tasks, Sub-Tasks, Steps, Knowledge/Skills, and associated attributes.<br>➢ **Import System Tasks.** Intended for Users analyzing systems or competencies. Supports importing System/Competency Task Analysis spreadsheets with Tasks, Sub-Tasks, Steps, Objectives, Knowledge/Skills, Learning Objectives, and related attributes. |

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| | ➢ **Import Job Tasks.** Intended for Users responsible for job/role analysis. Allows importing Job Task Analysis, RCAF, and RAAF spreadsheets, including Tasks, Sub-Tasks, Steps, Objectives, Knowledge/Skills, Learning Objectives, and relevant attributes. |
| **Edit Job Proficiency Levels** | This privilege governs access to specifying the proficiency levels that jobs/roles require for various systems or competencies. Assigning **Yes** grants the ability to set the required proficiency level for each job/role or occupation. Intended for system administrators and training/project managers.<br><br>**Note:** When more than one User has this privilege, all assigned Users can view and update each other's entries. |
| **Edit Project Tasks** | This privilege governs access to managing the Tasks that support missions and systems within a Project. Assigning **Yes** grants the ability to add, edit, and delete Project Tasks. Users working within specific missions or systems may add or edit Tasks, which automatically update the Project-level Task list. However, only Users with this privilege may delete a Project Task - removing it from the Project and all associated missions and systems. Intended for instructional designers and analysts.<br><br>**Note:** When more than one User has this privilege, all assigned Users can view and update each other's entries. |
| **Edit Team Knowledge/Skills** | This privilege governs access to defining and maintaining the shared knowledge and skills required by all jobs within a Project. Assigning **Yes** grants the ability to add, update, and delete knowledge/skills at the Project level. Users working on specific job analyses may add or edit knowledge and skills for their role, which automatically updates the Team Knowledge/Skills list. However, only Users with this privilege may delete knowledge/skills from the team list - removing them from every job under the Project. Intended for instructional designers and analysts.<br><br>**Note:** When multiple Users hold this privilege, they can view and update each other's entries. |
| **Edit Project Job Aids** | This privilege governs access to maintaining job aids that support mission, system, and job tasks across a Project. Assigning **Yes** grants the ability to add, update, and delete job aids at the Project level. Users working within specific missions, systems, or jobs may add or edit job aids, which automatically update the Project-wide list. However, only Users with this privilege may delete job aids from the Project list - removing them from every mission, system, and job under the Project. Intended for instructional designers and analysts.<br><br>**Note:** When multiple Users hold this privilege, they can view and update each other's entries. |

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| **Edit Project Policies** | This privilege governs access to maintaining policies that support mission, system, and job tasks across a Project. Assigning **Yes** grants the ability to add, update, and delete policies at the Project level. Users working within specific missions, systems, or jobs may add or edit policies, which automatically update the Project-wide list. However, only Users with this privilege may delete policies from the Project list – removing them from every mission, system, and job under the Project. Intended for instructional designers and analysts.<br><br>**Note:** When multiple Users hold this privilege, they can view and update each other's entries. |
| **Edit Project Tools** | This privilege governs access to maintaining tools that support mission, system, and job tasks across a Project. Assigning **Yes** grants the ability to add, update, and delete tools at the Project level. Users working within specific missions, systems, or jobs may add or edit tools, which automatically update the Project-wide list. However, only Users with this privilege may delete tools from the Project list – removing them from every mission, system, and job under the Project. Intended for instructional designers and analysts.<br><br>**Note:** When multiple Users hold this privilege, they can view and update each other's entries. |
| **Edit Project References** | This privilege governs access to establishing reference materials used across the Project. Assigning **Yes** grants the ability to define and record references (e.g., user manuals, guides, technical documents) that apply to all Tasks under the Project. Intended for instructional designers and analysts.<br><br>**Note:** When more than one User holds this privilege, all assigned Users can view and update each other's entries. |
| **Edit Project Acronyms** | This privilege governs access to establishing acronyms used across the Project. Assigning **Yes** grants the ability to define and record acronyms that support clarity and standardization throughout Project documentation. Intended for instructional designers and analysts.<br><br>**Note:** When more than one User holds this privilege, all assigned Users can view and update each other's entries. |
| **Edit Definitions** | This privilege governs access to establishing definitions used across the Project. Assigning **Yes** grants the ability to define and record definitions that support clarity and standardization throughout Project documentation. Intended for instructional designers and analysts.<br><br>**Note:** When more than one User holds this privilege, all assigned Users can view and update each other's entries. |

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| **Edit Writing Board Members** | This privilege controls access to setting up the Writing Board for a Training Analysis Project. Assigning **Yes** grants the ability to enter and maintain the list of Writing Board members, including their names and roles, ensuring the Project's decision makers are clearly documented. Intended for instructional designers and analysts.<br><br>**Note:** When more than one User holds this privilege, all assigned Users can view and update each other's entries. |
| **Edit Record of Decisions** | This privilege governs access to recording decisions made throughout a Training Analysis Project. Assigning **Yes** grants the ability to document and update the decisions agreed upon by Writing Board members, supporting transparency and consistent project governance. Intended for instructional designers and analysts.<br><br>**Note:** When more than one User holds this privilege, all assigned Users can view and update each other's entries. |
| **Edit Project Attributes** | This privilege governs access to creating shared **meta tags** that make it easier to locate and classify Tasks, Knowledge, Skills, and Attitudes. Assigning **Yes** grants the ability to set up common attributes – for example, domain-specific Knowledge or Skills – that support consistent tagging and faster retrieval across the Project. Intended for instructional designers and analysts.<br><br>**Note:** When more than one User holds this privilege, all assigned Users can view and update each other's entries. |
| **Edit Task Classification** | This privilege governs access to creating a unified classification structure for tasks and sub-tasks across a Project. Assigning **Yes** grants the ability to establish common Task Classification categories that make it easier to identify similar work performed on different systems, equipment types, or variants. Intended for instructional designers and analysts.<br><br>**Note:** When more than one User holds this privilege, all assigned Users can view and update each other's entries. |
| **Collect Course Data** | These privileges define how Users contribute financial and instructional design information to a Training Design Project.<br>➢ **Edit Data Collection Wizard.** Intended for course managers and subject matter experts. Enables entering key financial and instructional design data through the Data Collection Wizard, without access to results.<br>➢ **Edit Course Analysis.** Enables entering comprehensive financial and instructional design data through the Course Analysis folder. Results remain restricted.<br>➢ **Edit Data Collection Wizard Instructional Data.** Allows Users to provide instructional design inputs through the Data Collection Wizard **[Instructional Design]** tab. Results are not visible to the User. |

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| | ➢ **Edit Course Analysis Instructional Data.** Allows Users to enter detailed instructional design information within the Course Analysis instructional nodes. Results remain inaccessible.<br>➢ **Edit Data Collection Wizard Financial Data.** Allows entering financial data through the Data Collection Wizard [**Cost Factors**] tab. Results are not accessible.<br>➢ **Edit Course Analysis Financial Data** — Allows entering full financial data through the Course Analysis cost nodes. Results remain restricted. |
| **Programs** | This privilege governs access to organizing training courses and activities into structured Programs under the Training Design module.<br>➢ **Edit.** Intended for training managers, course managers, instructional designers, and analysts. Grants the ability to create, update, and manage Programs that group related training activities.<br>➢ **Browse.** Intended for Users who only need visibility. They may view Programs shared with them but cannot make changes. |
| **Course Analysis** | These privileges define how Users contribute to selecting the most effective and economical delivery strategies for training programs under the Training Design module.<br>➢ **Edit Course Analysis.** Intended for course managers, training managers, instructional designers, and analysts. Grants the ability to determine the optimal blend of delivery options that balance cost, learning effectiveness, and organizational needs.<br>➢ **Edit Course Analysis Instructional Data.** Intended for instructional designers and analysts. Enables evaluating non-financial factors – such as learner needs and instructional requirements—to identify viable delivery options.<br>➢ **Edit Course Analysis Financial Data.** Intended for course managers and financial analysts. Enables calculating and comparing the full cost profile of each delivery option.<br>➢ **Browse.** Intended for Users who only require visibility. They may view Course Analysis information shared with them but cannot make changes. |
| **Manage Courses** | This privilege governs access to reorganizing Course Analysis within the Program structure under the Training Design module. Assigning **Yes** grants the ability to move Course Analysis entries between Programs, supporting accurate grouping and streamlined management of training activities. Intended for training managers and analysts.<br><br>**Note:** When more than one User holds this privilege, all assigned Users can view and update each other's entries. |
| **Fidelity Analysis** | This privilege governs access to the Fidelity Analysis module to assess the fidelity needs of training devices within a Project.<br>➢ **Edit.** Intended for training managers and analysts. Grants the ability to evaluate fidelity requirements by examining job tasks, training objectives, synthetic environment conditions, environmental |

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| | elements, and sensory cues. Users can only perform fidelity assessments for the Clients they are assigned to.<br>➢ **Browse.** Intended for Users who require visibility only. They may view fidelity analysis shared with them but cannot make changes. |
| **Training Schedule** | This privilege governs access to the Training Schedule module to create and maintain Training Schedules, assign personnel and resources and track progress.<br>➢ **Edit.** Intended for project managers. Grants the ability to build and update Training Schedules, including personnel and resource assignments, and progress tracking.<br>➢ **Browse.** Intended for Users who only require visibility. They may view Project Plans shared with them but cannot make changes. |
| **Performance Analysis** | This privilege governs access to the Performance Analysis module to assess how well teams meet mission requirements and how effectively individuals perform their assigned tasks.<br>➢ **Edit.** Intended for instructional designers, analysts, and line managers. Grants the ability to document performance gaps, analyze underlying causes, recommend solutions, and identify the KSAs, job aids, and tools needed to improve performance. Users can only evaluate the Projects and Jobs they have been granted access to.<br>➢ **Browse.** Intended for Users who only require visibility. They may view performance analysis shared with them but cannot make changes. |
| **Performance Indicators** | This privilege governs access to the Performance Indicators section under the Performance Analysis module to establish measurable indicators that show how effectively missions and goals are being met.<br>➢ **Edit.** Intended for instructional designers, analysts, and line managers. Grants the ability to define objective metrics that quantify mission/goal performance and help determine the financial impact of performance gaps.<br>➢ **Browse.** Intended for observers who only require visibility. They may view performance indicators shared with them but cannot make changes. |
| **Solution Analysis** | This privilege governs access to the Solution Analysis module to assess how well potential solutions address performance gaps and what they cost to implement.<br>➢ **Edit.** Intended for instructional designers and analysts. Grants the ability to evaluate the feasibility and impact of each solution, including analyzing development and operational costs, resource requirements, and long-term support needs.<br>➢ **Browse.** Intended for Users who only require visibility. They may view solution analysis shared with them but cannot make changes. |

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| **Manage Resources** | This privilege governs access to the Managing Resource module to assess availability and workload across Projects. Assigning **Yes** grants the ability to approve resource time allocations, ensure resources are assigned appropriately, and resolve scheduling conflicts. Users can only manage resources for the Clients they support. Intended for resource managers. |
| **Generate Reports** | These privileges define how Users access reporting tools under the Reports module that compile data from across the organization to support decision-making.<br>➢ **All Reports.** Intended for leaders and analysts who need full visibility. Grants access to every report under the Reports tab, while still respecting data-access privileges.<br>➢ **Training Requirements & Benchmarks.** Help leaders and analysts understand upcoming training programs and job-specific training requirements.<br>➢ **Maximize Training Impact.** Provides insight into training effectiveness, highlighting gaps, duplications, cost drivers, and opportunities to improve alignment with operational needs.<br>➢ **Forecast Training Budget, Personnel & Resources.** Supports executives and training directors in planning budgets, staffing, and resource needs, including the impact of changes to course parameters.<br>➢ **Manage Projects, Personnel & Resources.** Helps managers keep projects on schedule and within budget by optimizing personnel and resource utilization.<br>➢ **Evaluate Costs & Impact.** Provides cost and ROI analysis for training interventions, helping leaders assess financial and operational impact. |
| **Edit Personal Preferences** | This privilege governs access to the Personalize section, where Users maintain their own account settings and project assignments. Assigning **Yes** grants the ability to update login and password information, customize interface preferences, and manage the Projects they are responsible for. Typically granted to all Users. |
| **XML Import/Export** | This privilege controls access to the XML tools used to move data between ADVISOR Enterprise installations. Assigning **Yes** grants the ability to export Projects, Courses, and Clients as XML files that can be imported into another ADVISOR Enterprise environment. Intended for system administrators and project managers. |

# Annex B – Preferences Details

**Manage Password and Contact Info [Password] tab**

| Option | Description |
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| **User Login** | This field allows Users to update their Login. The Login must be unique, include at least six characters, and is case sensitive. |
| **Password** | This field allows Users to update their password. Passwords must be at least six characters long and are case sensitive. |
| **Email Address** | This field allows Users to add or update their email address. Your email is used to reset your password and to receive notifications about new projects, approvals, time-off requests, and other important updates. |
| **Phone Number** | This field allows Users to enter or update the phone number they prefer to be contacted at. Project managers, supervisors, and colleagues will use this number when reaching out. |
| **Location** | This field allows Users to enter or update their work location. Providing this information helps project managers, supervisors, and colleagues account for time-zone differences when planning meetings or collaborating. |
| **Language** | This field allows Users to tailor ADVISOR's taxonomy, so the system reflects their clients' preferred terminology. For example, you may choose to use *Interactive Courseware* instead of *Computer Based Training*. Alongside the default English taxonomy, ADVISOR provides six additional options representing terminology typically used in Corporate, Government, S6000T, Canadian, UK, and US defence organizations. To update the taxonomy, simply choose the appropriate **Language** and click [**Save**]. More information is available in Sections *2.6* and *2.7*. |

**Manage Interface [Options] tab**

| Option | Description |
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| **ADVISOR Tour** | This setting controls whether the ADVISOR Online Tour appears when you log in. New Users may find the Tour helpful, while experienced Users may prefer to turn it off. Simply check or uncheck the **ADVISOR Tour** option and click [**Save**]. |
| **Auto Search** | This setting controls the Auto Search feature. When enabled, ADVISOR begins matching your input after five characters and instantly shows relevant missions, systems, jobs, tasks, KSAs, courses, and more. Once the list appears, you can choose any item and copy it – along with all its attributes – in one step. |

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| **Display Dashboards** | Users with administrative or Dashboard Perform privileges automatically see the Dashboard tab. If you prefer to show or hide it, simply check or uncheck **Display Dashboards** and click [**Save**]. |
| **Recommend Outcome / Classification** | This option helps Users correctly classify qualifications by automatically determining the learning domain and learning level based on the verb used in a statement. Domains and levels include Knowledge (Fact, Rule, Procedure, Discrimination or Problem Solving), Skill (Perception, Gross Motor Skills, Continuous Movement, Readiness, Mechanism or Adaptation), and Attitude (Receiving, Responding, Valuing, Competence, or Innovation). When checked, ADVISOR analyzes the verb as you type and assigns the appropriate domain and level automatically. Appendix C provides a full list of verbs for each category.<br><br>**Note**: The verb lists are stored in **verboutcome.js** file under the …\BNH\Advisor\js\default_ScriptLibrary directory. Clients may customize, as needed. |
| **Recommend LO Statement** | This option allows ADVISOR to automatically create Learning Objective (Teaching Point) statements whenever a KSA Gap is detected. The system builds the statement from the KSA title and the PO/EO's behaviour, condition, and standard – capturing what the learner must do, under what circumstances, and to what level of performance. |
| **Display ID** | This setting controls whether ADVISOR shows the internal codes for Nodes, Tabs, and Labels. These codes are used when customizing the taxonomy, such as renaming *Learning Objectives* to *Teaching Points*. See Section **2.7** for more information.<br><br>**Note:** After you check or uncheck **Display ID**, ADVISOR will ask you to reload so the interface can update and either display or hide the codes. |
| **Items per Page** | This setting controls how many items – such as Clients, Users, Courses, or Tasks – appear at once within a screen. If the total exceeds your selected number, ADVISOR automatically creates additional pages. You may choose any value between **1 and 99**. |
| **Items per Tab** | This setting determines how many items – such as Knowledge/Skills, Tools, or References – are shown at once within a tab. If the total exceeds your selected number, ADVISOR automatically creates additional pages. You may choose any value between **1 and 999**. |
| **Rows per Screen** | This setting determines how many rows (e.g., Tasks, KSAs) appear at one time in an **Edit All** screen. If the total exceeds your chosen number, ADVISOR adds extra pages automatically. You can choose any value from **1 to 999**. |
| **Import Style** | ADVISOR provides two ways to indicate which column in your import file corresponds to each ADVISOR field:<br>➢ Choose the column number from a **Drop-Down** list, or<br>➢ Type the column number directly into the **Text** field.<br><br>Select whichever method you prefer when mapping data for import. |

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| **Filter %** | ADVISOR uses fuzzy logic to help reduce duplication by identifying Knowledge, Skills, Attitudes, Job Aids, Policies, and Tools that appear similar within a Project. When you click the [**Filter Duplicates**] button (such as under *Team Knowledge/Skills*), ADVISOR groups items that closely resemble each other. You can then merge items to eliminate duplication while keeping all existing links intact, or flag items that are not actually similar, so ADVISOR learns for future comparisons. The **Filter %** controls how strong the match must be. Higher values mean items must be more alike. At **100%**, only exact matches are grouped. |
| **Color Theme** | This setting allows you to customize ADVISOR's color theme. You may choose from six options – Green (default), Purple, Blue, Brown, Red, or Charcoal – to adjust the look and feel of the interface. |
| **Display Theme** | ADVISOR offers three ways to navigate the system:<br>➢ **Classic (Recommended):** The default, modern interface – clean, easy to follow, and designed for most Users.<br>➢ **Classic (Experienced Users):** The original ADVISOR Enterprise layout, ideal for Users who prefer the legacy structure for quick access.<br>➢ **Modern:** A hierarchical navigation style that provides an alternate way to explore ADVISOR's content. |
| **Display Attributes in** | ADVISOR lets you choose how fields are arranged on the screen:<br>➢ 2 Columns (default) for a wider, side-by-side layout, or<br>➢ 1 Column for a streamlined single column view. |
| **Display Navigation Path** | This setting controls whether the Navigation Path appears in the Classic (Experienced Users) interface. Simply check or uncheck the field and click [**Save**] to show or hide it. |
| **Customize Task Display** | ADVISOR allows Tasks to be broken down into as many levels as needed. By default, only the terms **Task** and **Sub Task** are used, so any deeper subdivisions continue to appear as Sub Tasks. If you choose to limit Task breakdown to **four levels**, the **Customize Task Display** option assigns distinct names to each level: **Task**, **Sub Task**, **Step**, and **Sub Step**.<br><br>**Note:** When the first Task is labeled **Team**, the level beneath it is also labeled **Task**. |
| **Generate Reports on Server** | Some HTML reports – especially those over 40 MB – can take a long time to open. By enabling this option, ADVISOR generates TNA, Job Analysis, Course Analysis, Solution Analysis, and other large reports on the server. You'll receive an email notification as soon as your report is ready to download. |
| **Generate History Reports on Server** | ADVISOR's online history reports cover only the last 30 days. If you need a longer reporting period, simply check this option and click **Save**. ADVISOR will generate the extended history report and email it to you when it's ready. |

**[Display] tab – Specify Size of Windows**

This setting lets you customize how wide each window appears within ADVISOR tabs. Simply enter the preferred width for each module to tailor the layout to your working style and make key information easier to view.

**[Job Description] tab – Manage Job Description**

Use this section to enter information that helps Project Managers evaluate how well individuals match the requirements of different Tasks. Providing clear, relevant details supports better decision-making when assigning work.

**[Work Hours] tab – Specify Availability**

In this section, enter how many days per year you work and how many hours you work each day. These values help ADVISOR determine a person's true availability for Projects and Tasks and support accurate utilization calculations.

**[Retirement] tab – Anticipated Retirement**

Use this section to supply details that help Project Managers match individuals to the right Tasks and spot any gaps in critical skills that may require attention.

**[Privileges tab] – Current Privileges**

Use this option to see the privileges you currently have. It provides a clear list of all assigned permissions so Project Managers and administrators can verify access settings.

# Annex C – Verbs Associated with Learning Outcomes

The following tables are provided to facilitate the identification of qualifications – i.e., learning domain and learning level [Knowledge: Fact, Rule, Procedure, Discrimination or Problem Solving; Skill: Perception, Gross Motor Skills, Continuous Movement, Readiness, Mechanism or Adaptation; Attitude: Receiving, Responding, Valuing, Competence or Innovation]. They are compiled from MIL-HDBK 29612-2A, S6000T and ARTT-ASID.

| Outcome/Classification | | Verbs | |
|---|---|---|---|
| **Knowledge** | Answer | Apply | Brief |
| *** Fact** | Calculate | Coach | Collect |
| *** Remembering** | Compare | Confirm | Designate |
| | Distinguish | Divide | Duplicate |
| **Definition:** Recalling or retrieving previously learned data and information (facts, rules, concepts and principles) | Elaborate | Eliminate | Express |
| | Extract | Finalize | Finalise |
| | Find | Follow Directions | Gather |
| | Group | Identify | Inform |
| | Instruct | Label | List |
| | Match | Memorize | Memorise |
| | Name | Quote | Rank |
| | Read | Realign | Rebuild |
| | Recall | Recite | Recognize |
| | Recognise | Recommend | Recount |
| | Recreate | Repeat | Reproduce |
| | Restate | Schedule | Specify |
| | Tell | Tune | |
| | | | |

| | | Verbs | |
|---|---|---|---|
| **Knowledge** | Appraise | Change | Compile |
| *** Rule** | Compose | Correct | Compute |
| *** Comprehension** | Define | Depict | Discuss |
| *** Understanding** | Encrypt | Estimate | Extend |
| | Find | Find the difference | Format |
| **Definition:** Comprehending the meaning, translation, interpolation, and interpretation of instructions and problems. State a problem in one's own words. | Forward | Give example | Measure |
| | Outline | Paraphrase | Put in order |
| | Recognize | Recognise | Report |
| | Restate | Review | Rewrite |
| | Route | Simplify | Subtract |
| | Transcribe | Translate | |
| | | | |

| | Verbs | | |
|---|---|---|---|
| **Knowledge** | Advise | Allocate | Assume |
| *** Procedure** | Call | Check | Condense |
| *** Application** | Delete | Discuss | Dispense |
| | Distinguish | Edit | End |
| **Definition:** Attaining and applying knowledge. Understanding data and information (facts, rules, concepts and principles) in the context of work. | Execute | Facilitate | Finish |
| | Gauge | Host | Implement |
| | Keep records | Participate | Pause |
| | Persuade | Practice | Present |
| | Prioritize | Prioritise | Proof |
| | Prove | Reclaim | Relate |
| | Resume | Retrieve | Setup |
| | Ship | Show | Sign-on |
| | Situate | Sketch | Start |
| | Stop | Supply | Terminate |
| | Translate | Teach | |
| | | | |

| | Verbs | | |
|---|---|---|---|
| **Knowledge** | Arrange | Assign | Categorize |
| *** Discrimination** | Categorise | Challenge | Classify |
| *** Analysis** | Collate | Consolidate | Contrast |
| | Correlate | Cross-check | Debate |
| **Definition:** Separating material or concepts into component parts so that their organizational structure can be understood. Distinguishing between facts and inferences. | Deduce | Differentiate | Discriminate |
| | Experiment | Interview | Level |
| | Organize | Organise | Probe |
| | Question | Redistribute | Re-examine |
| | Relate | Select | Separate |
| | Sort | Survey | Task |
| | Template | Verify | |
| | | | |

| | Verbs | | |
|---|---|---|---|
| **Knowledge** | Analyze | Analyse | Annotate |
| *** Problem Solving** | Assume | Argue | Ascertain |
| *** Synthesize** | Assess | Attach | Avert |
| *** Evaluate** | Collect | Combine | Conclude |
| *** Create** | Consult | Convert | Create |
| | Criticize | Criticise | Critique |
| **Definition:** Making a judgment about the value of ideas or materials. It is the evaluation of reasoning, using specific criteria to evaluate and then decided. Using a set of criteria and responding effectively to unexpected experiences, present and defend opinions by making judgments about | Decide | Defend | Derive |
| | Design | Determine | Diagram |
| | Discover | Document | Draft |
| | Effect | Enlist | Evaluate |
| | Explain | Generalize | Generalise |
| | Generate | Guide | Hypothesize |
| | Hypothesise | Illustrate | Infer |
| | Investigate | Locate | Make a decision |
| | Maneuver | Manipulate | Mediate |

| | | | |
|---|---|---|---|
| information, the validity of ideas and the quality of work. | Mitigate | Model | Modify |
| | Negotiate | Observe | Offer |
| | Oversee | Plan | Predict |
| | Prescribe | Present | Produce |
| | Project | Rate | Rearrange |
| | Reason | Reconstruct | Recruit |
| | Relate | Reorganize | Reorganise |
| | Resolve | Revise | Rewrite |
| | Score | Search | Solve |
| | Summarize | Summarise | Synthesize |
| | Synthesise | Triage | Use |
| | Validate | Value | War game |
| | Write a review | | |
| | | | |
| | | **Verbs** | |
| **Psychomotor Skill** | Attempt | Chose | Delineate |
| *** Perception** | Detect | Distinguish | Enlarge |
| | Fall | Feel | Hear |
| **Definition:** The ability to use sensory cues to guide motor activity. This ranges from sensory stimulation, through cue selection, to translation. | Isolate | Jump | Listen |
| | Look | Pierce | Relate |
| | Scan | See | Sketch |
| | Smell | Stay | Strengthen |
| | Stretch | Taste | Throw |
| | Touch | Try | Twist |
| | Visualize | Visualise | Wear |
| | | | |
| | | **Verbs** | |
| **Psychomotor Skill** | Begin | Carry | Creep |
| *** Gross Motor Skills** | Depart | Define | Lift |
| *** Set** | Proceed | Pull | Run |
| | Shift | State | Swim |
| **Definition:** The readiness to act, to include material, physical, and emotional sets. These three sets are dispositions that predetermine a person’s response to different situations (sometimes called mindsets). | Turn | Volunteer | |
| | | | |
| | | **Verbs** | |
| **Psychomotor Skill** | Begin | Blueprint | Breakup |
| *** Continuous Movement** | Control | Copy | Depict |
| *** Guided Responses** | Dissect | Disturb | Discompose |
| | Disjoin | Divide | Duplicate |
| **Definition:** The early stages in learning a complex skill that includes | Follow | Imitate | Mimic |
| | Mock | Practice | Reinforce |

| | | | |
|---|---|---|---|
| imitation and trial and error. Adequacy of performance is achieved by practicing. | Replicate | Represent | Reproduce |
| | Scatter | Shorten | Split |
| | | | |
| | | | |
| | | **Verbs** | |
| **Psychomotor Skill** | Able | Cross | Delay |
| *** Readiness** | Guard | Prepare | Prime |
| | Ready | Set | Stand to |
| **Definition:** Having the readiness to take a particular action. | | | |
| | | | |
| | | | |
| | | **Verbs** | |
| **Psychomotor or Mental Skill** | Access | Acquire | Activate |
| *** Mechanism** | Actuate | Administer | Advance |
| *** Mechanism Basic** | Align | Archive | Arm |
| *** Complex Overt Response** | Assault | Attain | Automatize |
| *** Precision** | Balance | Beat | Breakup |
| | Breach | Calibrate | Camouflage |
| **Definition:** The intermediate and skillful performance of motor acts that involve complex movement patterns. Proficiency is indicated by a quick, accurate and highly coordinated performance, requiring a minimum of energy. This category includes performing without hesitation and automatic performance. | Carve | Center | Centre |
| | Charge | Clean | Clear |
| | Climb | Close | Cover |
| | Debrief | Debug | Decontaminate |
| | Deliver | Destroy | Diagnose |
| | Dig | Disassemble | Disconnect |
| | Disengage | Dismantle | Dispatch |
| | Disperse | Displace | Display |
| | Dispose | Disseminate | Distribute |
| | Do | Drive | Egress |
| | Elevate | Emplace | Employ |
| | Engage | Energize | Energise |
| | Enter | Establish | Evacuate |
| | Exchange | Exceed | Execute |
| | Excel | Fasten | File |
| | Fill-out | Fire | Fit |
| | Fix | Fortify | Fuel |
| | Ground | Guide | Handle |
| | Harden | Hoist | Hover |
| | Improve | Initialize | Initialise |
| | Input | Insert | Inspect |
| | Install | Integrate | Intercept |
| | Issue | Jack | Join |
| | Key | Land | Launch |
| | Load | Log | Lubricate |
| | Maintain | Make Safe | Manage |
| | Maneuver | Master | Mount |
| | Move | Navigate | Obtain |

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|---|---|---|---|
| | Open | Operate | Order |
| | Outdo | Outmatch | Outperform |
| | Outrank | Outweigh | Overcome |
| | Overhaul | Pace | Park |
| | Pass | Perform | Perforate |
| | Place | Plot | Police |
| | Position | Post | Press |
| | Pressurize | Pressurise | Process |
| | Procure | Progress | Provide |
| | Publish | Qualify | Raise |
| | Range | Rank | Reach |
| | Receive | Record | Re-establish |
| | Refine | Refuel | Regulate |
| | Release | Relocate | Remove |
| | Repair | Replace | Replenish |
| | Reset | Return | Rise |
| | Rotate | Sanitize | Save |
| | Scale | Score | Secure |
| | Send | Service | Shutdown |
| | Sight | Signal | Sketch |
| | Splint | Squeeze | Stockpile |
| | Steer | Stoop | Store |
| | Stow | Strike | Submit |
| | Succeed | Supervise | Support |
| | Surpass | Sweep | Take |
| | Take-charge | Take off | Tap |
| | Test | Tighten | Trace |
| | Track | Transcend | Transfer |
| | Transmit | Transport | Traverse |
| | Treat | Troubleshoot | Type |
| | Unload | Update | Utilize |
| | Utilise | Wire | Write |
| | Zero | | |
| | | | |
| | | **Verbs** | |
| **Psychomotor or Mental Skill** | Acclimatize | Acclimatise | Accommodate |
| *** Adaptation** | Adapt | Adjust | Ambush |
| | Attack | Bypass | Conduct |
| **Definition:** This category includes skills that are well developed, and the individual can modify movement patterns to fit special requirements. | Deploy | Direct | Draw |
| | Evade | Fix | Flip |
| | Grasp | Infiltrate | Invert |
| | Lay | Lead | Map |
| | Modulate | Mutate | Neutralize |
| | Neutralise | Occupy | Orient |
| | Oscillate | Pack | Patrol |
| | Prevent | Program | Protect |

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| | Queue | Readjust | Rearrange |
| | Reconcile | Reconstitute | Reconstruct |
| | Recover | Reduce | Regulate |
| | Relieve | Reorder | Reorganize |
| | Reorganise | Reorient | Reshuffle |
| | Retool | Revert | Rig |
| | Spin | Square | Suppress |
| | Surpass | Swing | Swirl |
| | Tailor | Temper | Train |
| | Transcend | Transpose | Twirl |
| | Vary | | |
| | | | |
| | | **Verbs** | |
| **Psychomotor or Mental Skill** | Acquire | Assemble | Blend |
| *** Origination** | Breakup | Build | Carry out |
| | Cause | Complement | Connect |
| **Definition:** Creating new movement patterns to fit a particular situation or specific problem. Learning outcomes emphasize creativity based upon highly developed skills. | Constitute | Construct | Contrive |
| | Disperse | Distribute | Enact |
| | Encircle | Enclose | Evolve |
| | Execute | Handle | Improve |
| | Incorporate | Initiate | Invent |
| | Involve | Link | Make |
| | Merge | Originate | Progress |
| | Refine | Rewire | Stoop |
| | Transcend | Transform | Unite |
| | | | |
| | | **Verbs** | |
| **Attitude** | Attend | Attend closely | Be Aware |
| *** Receiving, Perception &** | Directing attention | Getting attention | Give |
| **Awareness** | Hold | Holding attention | Listen attentively |
| | Monitor | Perceive | Reconnoiter |
| **Definition:** The ability to perceive the normal, abnormal and emergency cues associated with the performance of an operational procedure. Situational awareness of operational cues. | Reply | Show alertness | Show awareness |
| | Show sensitivity | Tolerate | View |
| | Wait | Watch | |
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| | | | |
| | | **Verbs** | |
| **Attitude** | Accomplish | Achieve | Acknowledge |
| *** Responding** | Advise | Aid | Allow |
| | Announce | Anticipate | Apologize |
| **Definition:** The mental preparedness to encode operational cues as indicators of normal, abnormal and emergency conditions associated | Apologise | Ask | Assist |
| | Communicate | Complete | Complete Assignment |
| | Comply | Conform | Consent |

| | | | |
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| with the performance of an operational procedure. | Contact | Contribute | Cooperate |
| | Demonstrate | Describe | Discipline |
| | Discuss | Encode | Enquire |
| | Entertain | Follow-up | Greet |
| | Indicate | Interpret | Label |
| | Notify | Obey rules | Participate |
| | Permit | Praise | Pursue |
| | Question | React | Refuse |
| | Reply | Request | Respond |
| | Resume | Seek | Visit |
| | Volunteer | Welcome | |
| | | | |
| | | **Verbs** | |
| **Attitude** | Adopt | Appreciate | Belief |
| *** Valuing (Judgement)** | Cancel | Choose | Commit |
| | Contemplate | Desire | Dispute |
| **Definition:** The ability to judge the worth or quality of normal, abnormal and emergency cues associated with the performance of an operational procedure. | Endorse | Enjoy | Ensure |
| | Exhibit | Form | Invite |
| | Judge | Justify | Participate |
| | Prefer | Propose | Report |
| | Sanction | Share | Study |
| | | | |
| | | **Verbs** | |
| **Attitude** | Adhere | Alter | Approve |
| *** Competence (Application)** | Care | Characterize | Characterise |
| *** Organize** | Coordinate | Group | Observe |
| | Perceive | Reconnoiter | Systemize |
| **Definition:** The mental preparedness to make decisions, by using prioritized strategies and tactics in response to normal, abnormal and emergency condition cues associated with the performance of an operational procedure. | Systemise | | |
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| | | | |
| | | **Verbs** | |
| **Attitude** | Act | Advocate | Alert |
| *** Innovation** | Approve | Assess | Assume |
| *** Characterize** | Authenticate | Behave | Believe |
| | Characterize | Characterise | Command |
| **Definitions:** The mental preparedness to make decisions by generating the results expected upon completion of prioritized strategies or tactics. It includes the response to | Conceive | Conform | Conjecture |
| | Conserve | Constitute | Continue |
| | Develop | Devise | Devote |
| | Disclose | Encourage | Endure |
| | Enforce | Ensure | Exemplify |

| | | | |
|---|---|---|---|
| normal, abnormal and emergency cues associated with the performance of an operational procedure, and the ability to generate new prioritized strategies and tactics. | Exonerate | Favor | Favour |
| | Formulate | Function | Imagine |
| | Incorporate | Influence | Innovate |
| | Perceive | Practice | Prescribe |
| | Preserve | Prioritize | Prioritise |
| | Promote | Qualify | Question |
| | Rally | Rationalize | Rationalise |
| | Reassess | Reconnoiter | Reserve |
| | Respect | Retain | Review |
| | Sell | Serve | Systemize |
| | Systemise | Uphold | Validate |
| | Verify | Vindicate | |