Configuring ADVISOR: Step-By-Step Guide For 1st Time Users

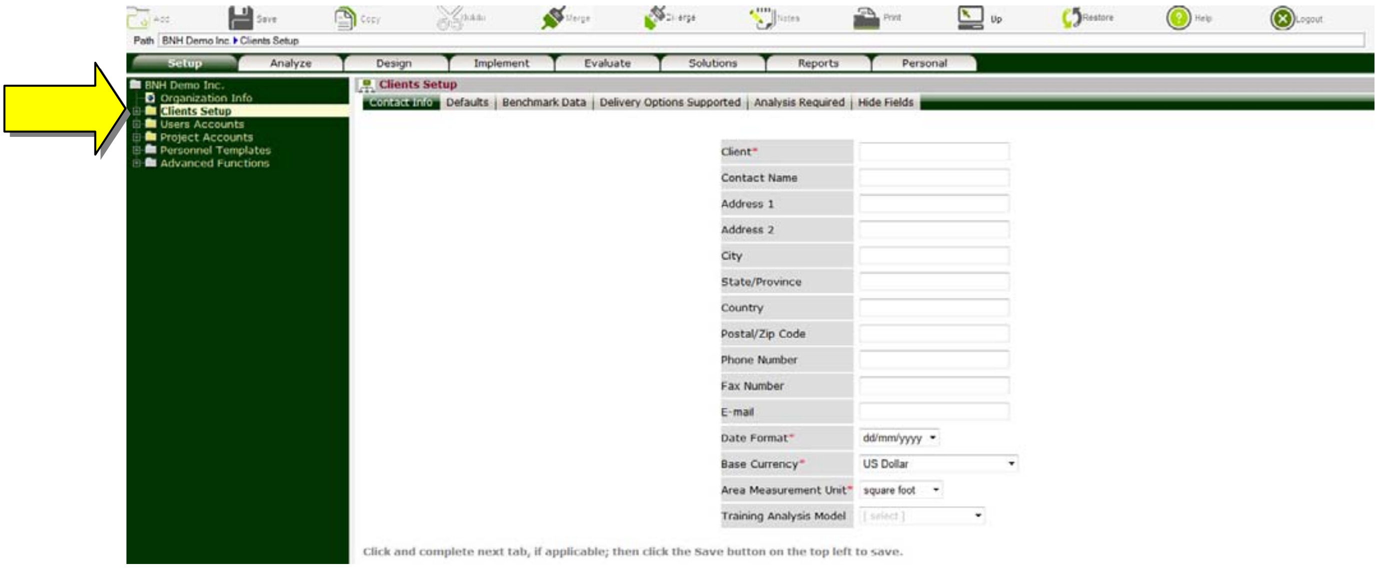
Latest Update: October 30, 2012

1. Introduction

The following guidelines are prepared to assist System Administrators in configuring ADVISOR to better meet the needs of Training Divisions and users/analysts. It is divided into the following sections:

2. Setup New Client

To create a new client, click on the **Clients Setup** folder, and then click on Add (button). You will be prompted for the Client, Contact Name and other info. Data required by ADVISOR is identified by a red asterisk (*). Of course, the more data you provide, the better the results.

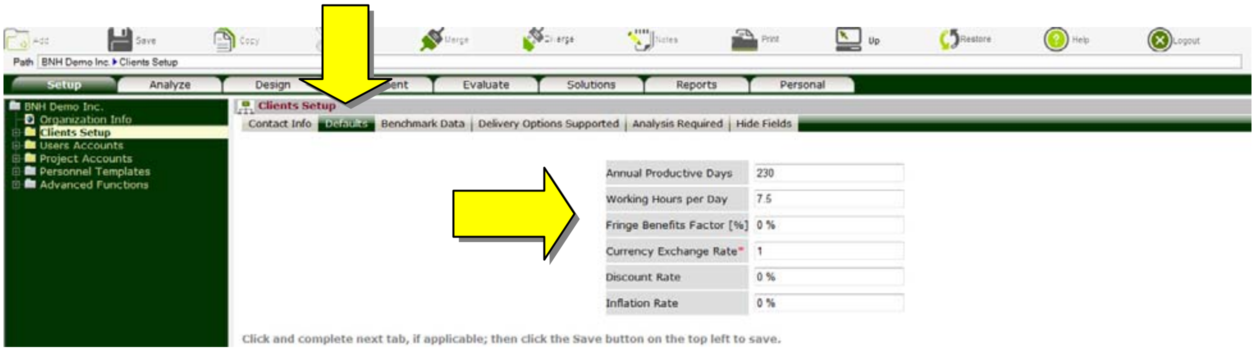


<u>Note:</u>

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

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

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



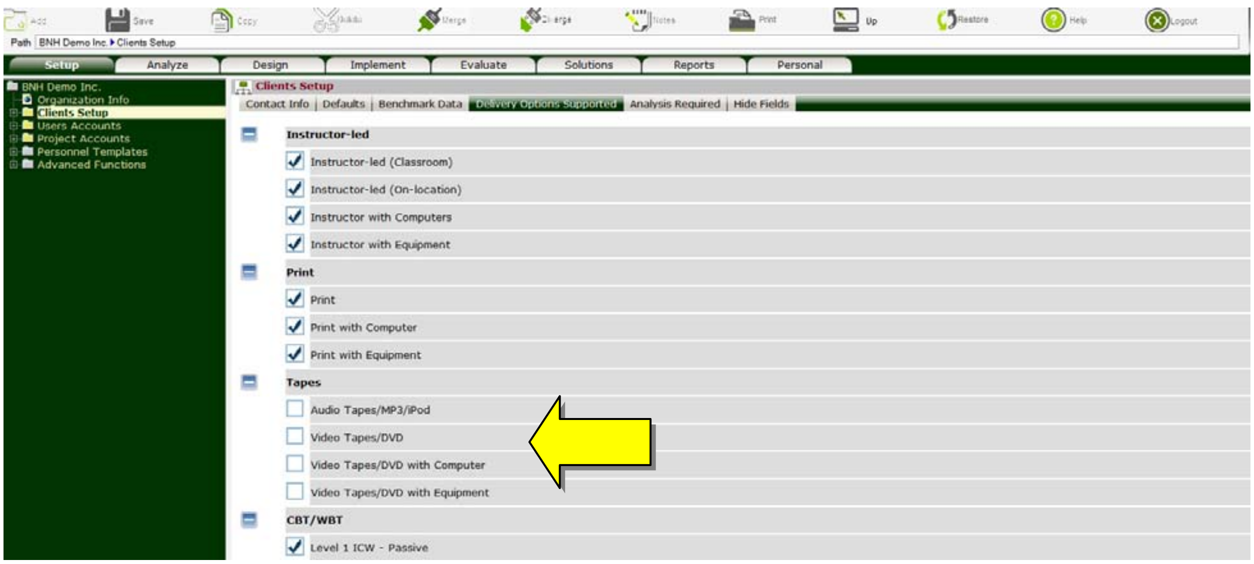
# of Employees Eligible for Training, Annual Payroll of Employees, # of Employees Trained [per year], # of Trainers as well as the Annual Training per Employee [hours] can be specified under [Benchmark Data] tab.

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

3. Eliminate Delivery Options Not Supported by Client

To indicate Delivery Options supported by the Client, click on the [Delivery Options Supported] tab and place checkmarks next to the required options. By default, all options are selected. A brief description of each Delivery Option can be viewed by clicking on the [Help] button. A hard copy is also available in Appendix A of the ADVISOR Enterprise "Select Right Blend of Delivery Options", User Guide.

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

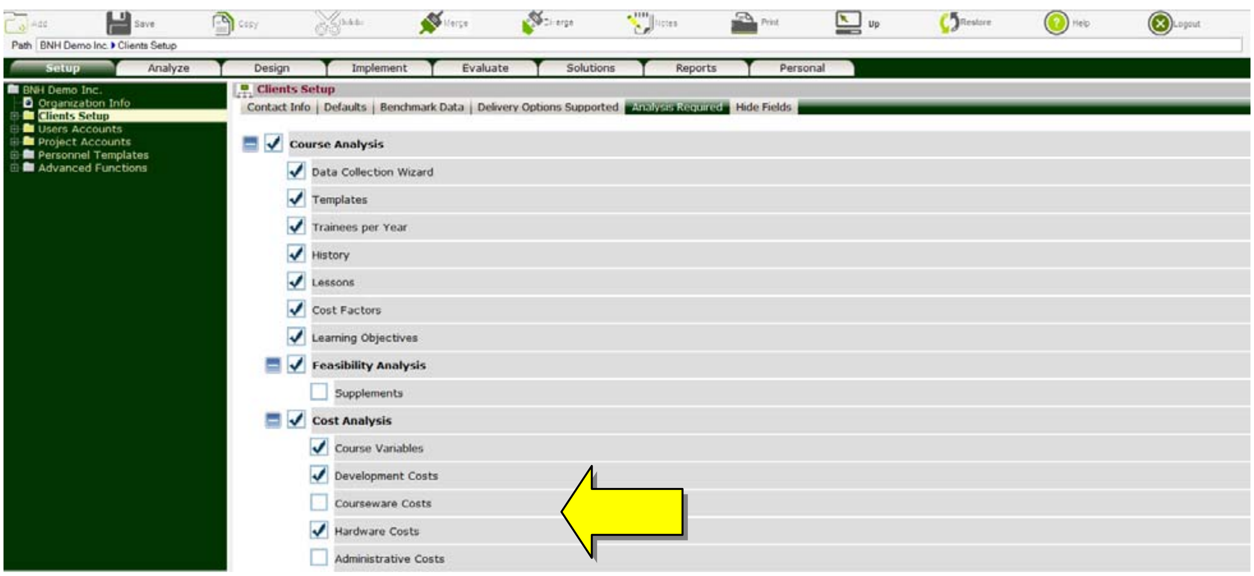


4. Simplify Analysis Process

To specify data to be collected and analysis to be performed click on the [Analysis Required] tab and place checkmarks next to the required items. By default, all data and analysis are selected. By indicating which analysis and data are not needed, ADVISOR will automatically hide nodes, tabs and fields that are no longer required, and in-turn streamline data collection and reduce time required to conduct the analysis – a very effective way of configuring ADVISOR to better meet your needs.

For example, if a Client is only interested in considering Development and Hardware Costs, then the checkmarks for all other costs should be removed, as shown below. These costs can be reinstated should there is a need to capture the overall costs of the training program.

<u>Implication:</u> All fields corresponding to data and analysis not required by Client will be automatically hidden. For example, fields related to Supplements as well as Courseware and Administrative costs in the example below will be hidden under Course Analysis along with corresponding Templates. This will in-turn further streamline the interface and reduce time needed to conduct the analysis. Since the Analysis Required configuration impacts all Courses assigned to the Client, impact of decisions should be carefully assessed.



Click Submit (button) when ready, to save.

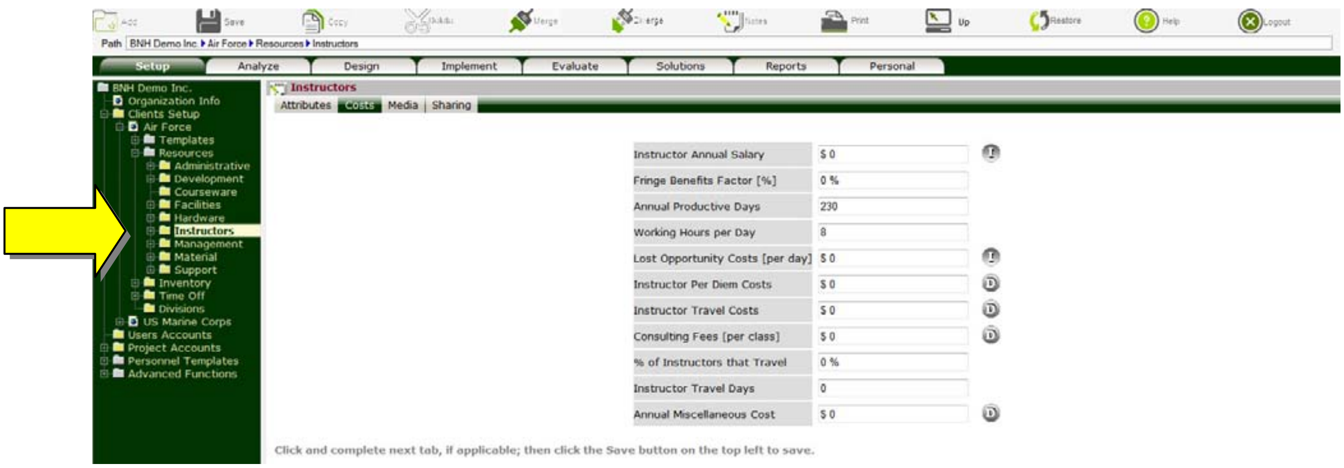
5. Setup Templates/Resources

To speed course analysis and maintain consistency, common instructional design and cost data can be created and shared among users/analysts.

You may create as many Templates as you need under each category. For example, the costs for junior, intermediate as well as senior in-house or external instructors can be saved under the Instructor Costs Template. Once created, the data can be easily imported in any section within any course assigned to the Client, using the **Import Cost Data** node under **Cost Analysis** folder under **Group Analysis** folder under **(course title)** node.

In addition to speeding the course analysis, Templates can be effective in conducting multiple what if scenario. For example, to compute and compare budgets and resources needed to deliver training using internal versus external instructors. Moreover, Templates facilitate the re-computation of course costs as data changes. To re-compute course costs for new instructor salaries, for example, update the Instructor Templates. If the Auto Populate is set to On under the **Instructors** node under **Cost Analysis** folder under the course, the data will be automatically updated and recomputed.

To add a new Template, click on ⊞ next to **Templates** or **Resources** folder to display the categories. Click on the required category **Instructors**, for example, and then click on Add (button). Input required data, specify media that can use this template (Instructor-led, Video Conferencing and Internet Virtual Classroom, for example) and click the Save button. Since Templates can impact all Courses assigned to Client, care should be exercised in organizing templates.

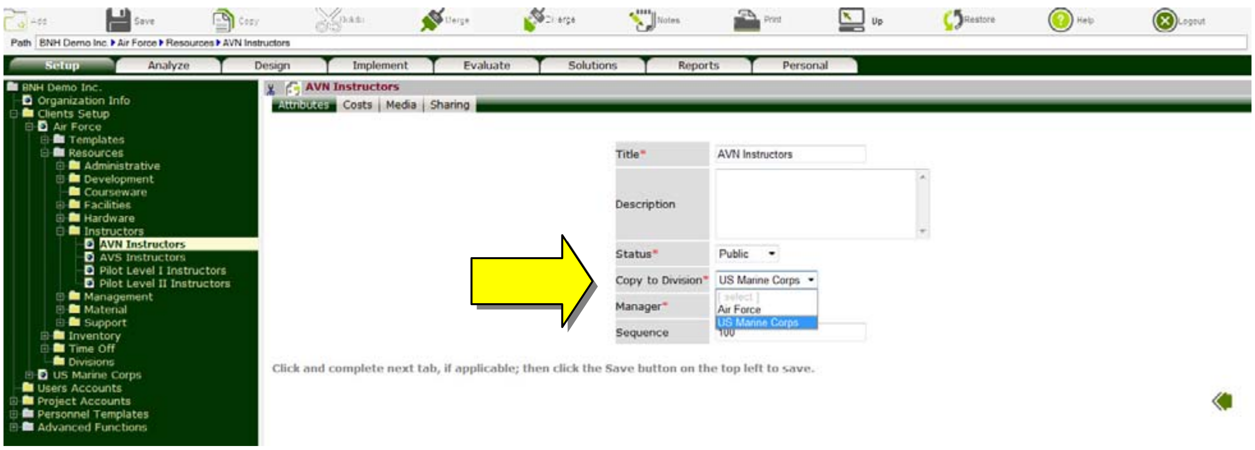


Notes:

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

6. Copy Templates/Resources between Clients

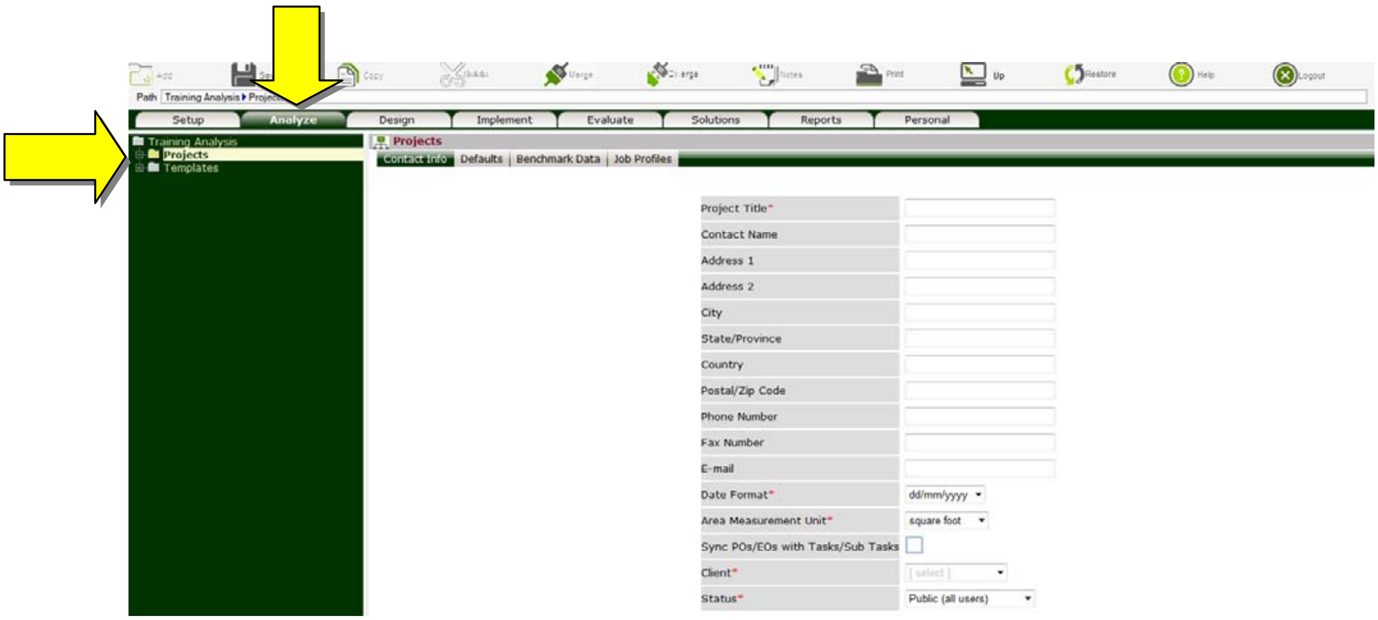
To copy a Template from one Client to another, locate the Template you wish to copy by clicking on the ⊞ next **Templates** or **Templates** folder to display the categories. Click on relevant category **Instructors**, for example, and then click on the desired Template. Select the Client you wish to copy the Template under and click Save to copy.



7. Setup Learner Profiles

7.1 Setup New Project

To create a new Project, click on the **Projects** folder, and then click on Add (button). You will be prompted for the Project Title, Contact Name and other info. Data required by ADVISOR is identified by a red asterisk (*). Of course, the more data you provide, the better the results.



Click on the [Defaults] tab to specify Annual Productive days, Working Hours per Day and Fringe Benefits Factor for the project. The Currency and Inflation Rate will follow the Client.

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

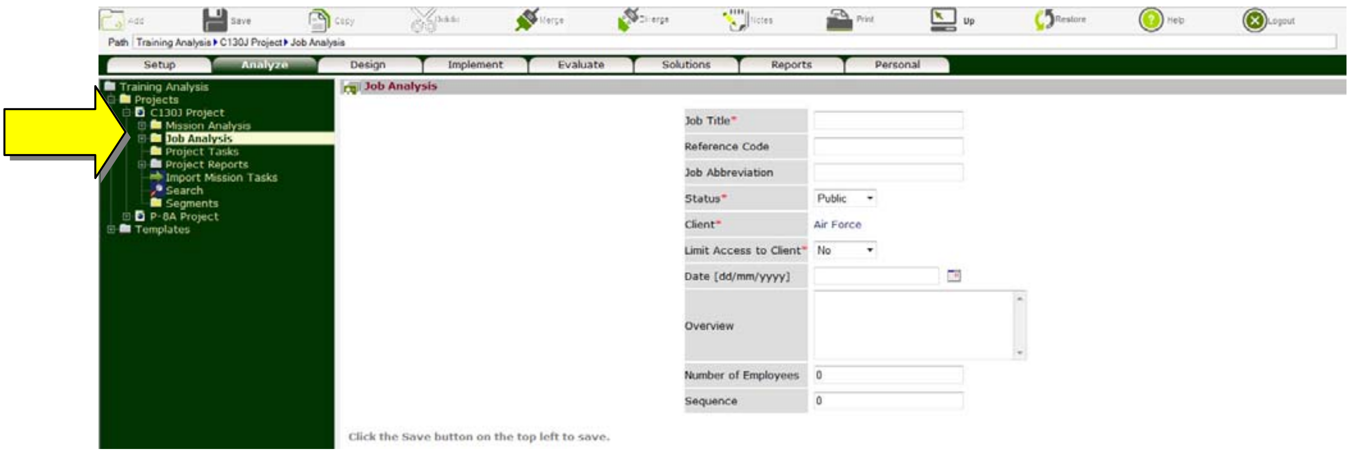
# of Employees in Division, Annual Payroll of Employees, # of Employees Trained [per year], # of Trainers as well as the Annual Training per Employee [hours] can be specified under [Benchmark Data] tab.

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

Click the Save button when ready, to save.

7.2 Setup Job Profiles

Multiple Job Profiles can be set-up within each Project. To create a new Job Profile, click on the **Job Analysis** folder, and then click on Add (button). You will be prompted for the Job Title and a brief overview. Input the required information and click the Save button.



The profile of each job, including financial data as well as characteristics that may impact the effectiveness of alternate delivery media can also be specified in this section by clicking on the **Financial Data**, **Characteristics**, or **Attitude** nodes, completing relevant sections and clicking the Save button.

Once created, the data can be easily imported in any course using the **Target Audience** folder under the **(course title)** node.

In addition to speeding the course analysis process, Job Profiles can be effective in conducting multiple what if scenario. For example, determine the feasibility of using a delivery media for multiple groups. Moreover, Job Profiles facilitate the re-computation of course costs as data changes. To re-compute course costs for new Technicians Salary, for example, update the Technicians Salary under **Financial Data** node, and re-imported the updated salary by clicking on **Import Audience Characteristics** node under **Target Audience** folder under each course required by the Technicians, followed by the Save button.

8. Setup Users

To create an account for a new user, click on the **Users Accounts** folder, and then click on Add (button). You will be prompted for general information, such as the user's first name, last name, title and password. The User Login is automatically generated, once you click Save. The User Login is composed of the individual's first initial and last name. Since each user requires a unique User Login, if the User Login already exists a digit is added. Users may edit their Login and Password by clicking on the **Preferences** node under the **Personal** folder under [Personal] tab after the log in ADVISOR. Data required by ADVISOR is identified by a red asterisk (*).

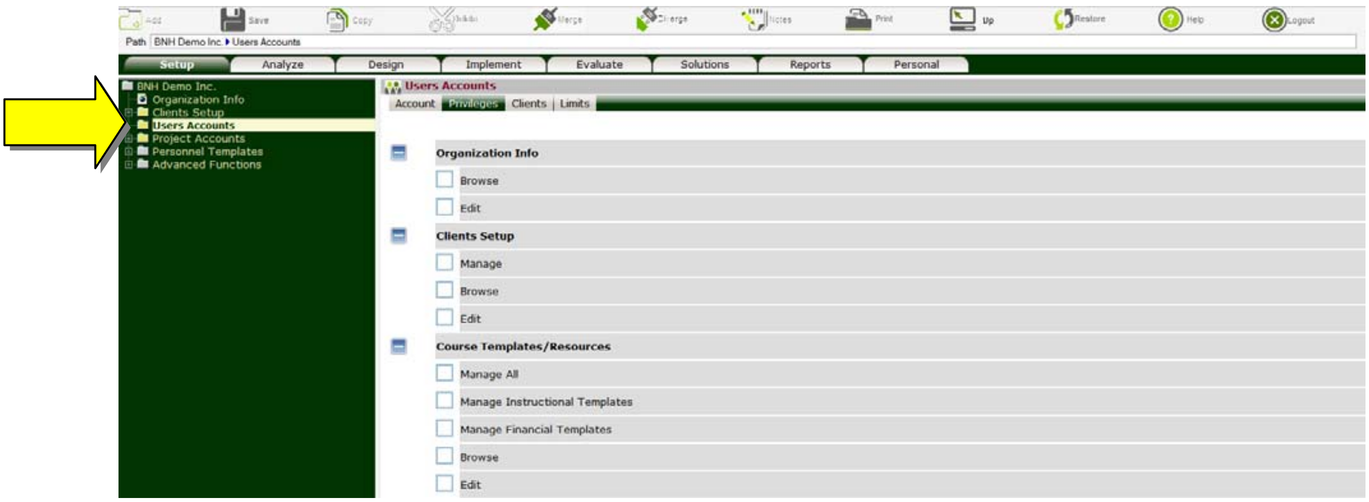
Access to ADVISOR can be denied without deleting the User by specifying an expiry data under the Limits tab.

Note: If the password is changed, the corresponding Secret Question and Answer that the User may have provided (as an alternate access to ADVISOR) will be deleted.

Privileges

To indicate what the User can or cannot do, click on the Privileges tab and place checkmarks next to the desired options. By default, no privileges are assigned to new users. The System Administrator privilege on the other hand, provides the User with access to all data. A brief description of each function can be viewed by clicking on the [Help] button. A hard copy is also included in Section 3.2 of “ADVISOR Configuration” User Guide.

Implication: If a User can Browse, but not Edit, Manage or Perform a function, then the information is presented in a “read only” mode. If on the other hand, no privileges are assigned to a particular function, for example a User cannot Browse or Edit Organization Info, then the corresponding node(s) **Organization Info** node in this case is not presented. In other words, ADVISOR will automatically hide relevant nodes.



Privileges can be very effective in:

- Managing tasks within the organization. For example, by assigning the Browse privilege to Clients Setup and Course Templates, analysts can view Clients and Templates – but not edit nor create. These functions may be assigned to another individual or performed by System Administrator.

- Simplifying the use of ADVISOR and streamlining the interface by only assigning relevant functions to each User.

Clients

To assign the user to specific Client(s), click on the [Clients] tab and place checkmarks next to the corresponding Clients. By default, new users are not assigned to any Client.

Implication: User can only share data (course analysis, for example) with other Users assigned to the same Client. Moreover, User's privileges can only be exercised within the Clients(s) that they are assigned to. For example, if Nancy Smith is assigned to Client A, and her privileges allow her to analyze courses, then she can only analyze courses and utilize the Templates within Client A.

Limits

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

- The maximum number of courses the User can manage at a time. It does not limit the number of analysis that a User may perform, simply the number of analysis that can be saved at any one time. For example, if 5 courses are assigned to Nancy Smith, then Nancy Smith can analyze as many courses as she needs, but can only save the results of 5 courses at a time. In other words, once Nancy Smith reaches the 5 course limit, she can delete a course and utilize the freed up space to analyze another course. If no courses are assigned, then the number of courses licensed by the organization limits the combined number of courses managed by all Users.

- To provide temporary access to a partner or a client, for example, you can specify the expiry date for the account. In other words, the User will not be able to access the system after the expiry date.

Remember that context sensitive help is also available for each screen by clicking on the Help (button). Enjoy!