
ADVISOR Enterprise Data Collection Worksheets

[Latest Update September 08, 2017]

Introduction

Dozens of Excel Spreadsheets are provided 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. Although the import function is fairly intuitive, to minimize errors please read and follow the instructions below.

Spreadsheet Structure

Each spreadsheet is divided into two tabs:

1st tab: To be used by Subject Matter Expert for populating data

2nd tab: Includes options to support the population of data

How to Minimize Problems

To ensure that data provided by Subject Matter Experts can be easily imported in ADVISOR Enterprise, protecting the 2nd tab against accidental changes is highly recommended. To protect:

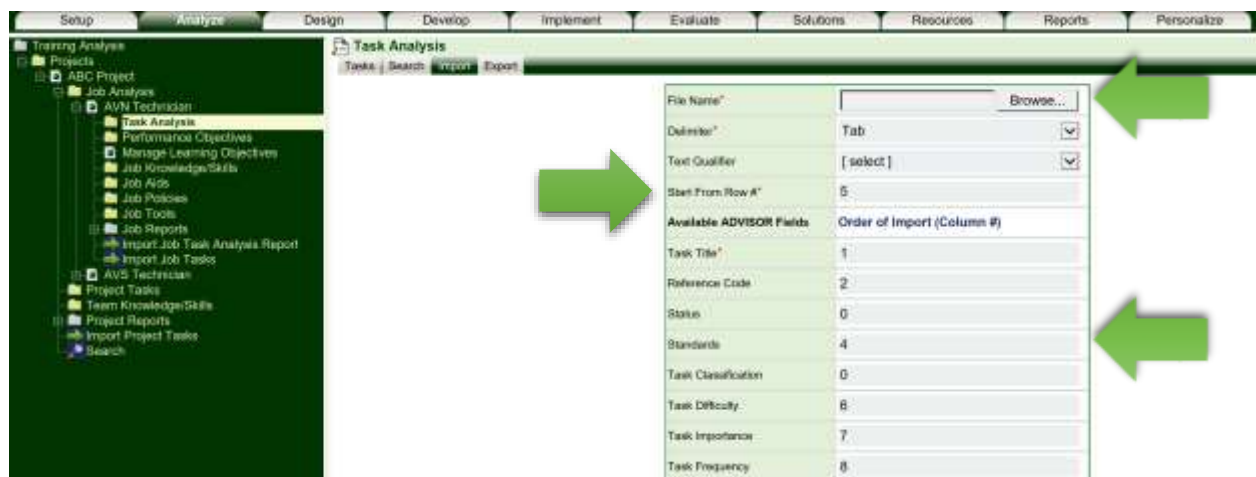
- Click on the 2nd tab (Dropdown)
- Click on the **Review** Tab
- Click **Protect Sheet**, input password (advisor, for example) and click **Ok**.

How to Import

- 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. The chart below indicates where each spreadsheet should be imported.
- Click on the Import tab



- Click Browse and select the desired spreadsheet.



- Start From Row. Indicates from which row the import should start. The top 4 rows in ADVISOR Excel spreadsheets are reserved for headings and instructions. Collected data typically starts on the 5th row.
- Indicate where the data for each field resides within the Excel spreadsheet. For example, if the Task Title is stored in column 1, then input 1; and so forth. Data in the Excel spreadsheets is sequentially mapped to corresponding fields in ADVISOR. Please note that you are not required to import all attributes. For example, if the Status and Task Classification attributes are not required, do not input column numbers for these fields. ADVISOR will not import data for attributes that have not been assigned a column number.
- Click the **Save** button to import.

Notes:

- ❖ The **Reference Code** attribute is used by ADVISOR Enterprise to detect duplicate records. For example, when a Job Task is imported, ADVISOR will 1st verify whether the Job already has a Task with the same Reference Code. If it does, the following message will appear “Duplicate Records already exist. Overwrite attributes?” If Ok is selected, the attributes of the Job Task in ADVISOR will be updated – i.e., duplicate Job Tasks will not be created. If Cancel is selected, the import will be aborted.

If the Reference Code for a record is not specified or imported, ADVISOR Enterprise will assume that the record is new and will create accordingly. This, in-turn, may lead to the creation of duplicate records.

- ❖ Delimiter is only required if Text (Tab delimited), CSV (Comma delimited) or Formatted Text (Space delimited) files are imported.
- ❖ Text Qualifier is only relevant if CSV (Comma delimited) files are imported.

Common Errors

- **Missing Attributes.** Although you can select which attributes to import, if an attribute (Task Difficulty, for example) is selected than the Task Difficulty should be specified for all Tasks in the spreadsheet. In other words, an error message will appear if the attribute (Task Difficulty) is not defined for all records.
- **Wrong Format for Attributes.** The value for each attribute (Task Difficulty, for example) in the Excel spreadsheet should correspond to valid inputs in ADVISOR Enterprise. For example, only 1 – High, 2 – Medium and 3 – Low, are acceptable for the Task Difficulty attribute. An error message will appear if value for an attribute (Task Difficulty) is not acceptable.

Where to Import Spreadsheets

Spreadsheet Title	ADVISOR	
	Tab	Folder
1_Clients_Setup	Setup	Clients Setup
2_Users_Accounts	Setup	Users Accounts
7_Analyze_Projects	Analyze	Projects
8_Project_Missions	Analyze	Projects ► Mission Analysis
9_Mission_Segments	Analyze	Projects ► Mission Analysis ► Segments
10_Mission_Tasks	Analyze	Projects ► Mission Analysis ► Tasks
11_Systems	Analyze	Projects ► Systems Analysis
12_System_Tasks	Analyze	Projects ► Systems ► Tasks
13_System_Objectives	Analyze	Projects ► Systems ► Performance Objectives
14_Jobs	Analyze	Projects ► Job Analysis
15_Job_Duties	Analyze	Projects ► Job Analysis ► Duties
16_Job_Tasks	Analyze	Projects ► Job Analysis ► Task Analysis
17_Job_Objectives	Analyze	Projects ► Job Analysis ► Performance Objectives (POs)
18_Objective_Steps	Analyze	Projects ► Job Analysis ► POs ► Steps

19_Objective_Cues	Analyze	Projects ▶ Job Analysis ▶ POs ▶ Cues
20_Objective_Measures	Analyze	Projects ▶ Job Analysis ▶ POs ▶ Measures
21_KSA	Analyze	Projects ▶ Job Analysis ▶ POs ▶ Knowledge/Skills
22_Job_Aids	Analyze	Projects ▶ Job Analysis ▶ POs ▶ Job Aids
23_Policies	Analyze	Projects ▶ Job Analysis ▶ POs ▶ Policies
24_Tools	Analyze	Projects ▶ Job Analysis ▶ POs ▶ Tools
25_Learning_Objectives	Analyze	Projects ▶ Job Analysis ▶ POs ▶ Training ▶ LOs
26_Test_Items	Analyze	Projects ▶ Job Analysis ▶ POs ▶ Training ▶ LOs ▶ Test
27_Project_References	Analyze	Projects ▶ Project References
28_Project_Attributes	Analyze	Projects ▶ Project Attributes
29_Template_Course_Variables	Setup	Clients Setup ▶ Templates ▶ Course Variable
30_Template_Instructional_Design_Factors	Setup	Clients Setup ▶ Templates ▶ Instructional Design
31_Template_Instructional_Requirements	Setup	Clients Setup ▶ Templates ▶ Instructional Requirements
32_Template_Technical_Capabilities	Setup	Clients Setup ▶ Templates ▶ Technical Capability
33_Template_Transmission	Setup	Clients Setup ▶ Templates ▶ Transmission Costs
34_Template_Travel	Setup	Clients Setup ▶ Templates ▶ Travel Costs
35_Resources_Administrative	Setup	Clients Setup ▶ Resources ▶ Administrative
36_Resources_Development	Setup	Clients Setup ▶ Resources ▶ Development
37_Resources_Courseware	Setup	Clients Setup ▶ Resources ▶ Courseware
38_Resources_Facilities	Setup	Clients Setup ▶ Resources ▶ Facilities
39_Resources_Hardware	Setup	Clients Setup ▶ Resources ▶ Hardware
40_Resources_Instructor	Setup	Clients Setup ▶ Resources ▶ Instructors
41_Resources_Management	Setup	Clients Setup ▶ Resources ▶ Management
42_Resources_Material	Setup	Clients Setup ▶ Resources ▶ Material
43_Resources_Support	Setup	Clients Setup ▶ Resources ▶ Support
44_Course_Wizard	Design	Data Collection Wizard
45_Course_Attributes	Design	Course Analysis
46_Course_Learning_Objectives	Design	Course Analysis ▶ Learning Objectives
47_Develop_Projects	Develop	Projects
48_Training_Devices	Develop	Projects ▶ Train. Devices
49_Training_Devices_Jobs	Develop	Projects ▶ Train. Devices ▶ Jobs
50_Job_Objectives	Develop	Projects ▶ Train. Devices ▶ Jobs ▶ POs
51_Training_Device_Courses	Develop	Projects ▶ Training Devices ▶ Courses
52_Course_Learning_Objectives	Develop	Projects ▶ Training Devices ▶ Courses ▶ LOs
53_Training_Device_Components	Develop	Projects ▶ Training Devices ▶ Components
54_Training_Device_Elements	Develop	Projects ▶ Training Devices ▶ Environment
55_Training_Device_Elements_Activities	Develop	Projects ▶ Training Devices ▶ Environment ▶ Activities
56_Training_Device_Cue_Categories	Develop	Projects ▶ Training Devices ▶ Sensory Cues
57_Training-Device_Cues	Develop	Projects ▶ Training Devices ▶ Sensory Cues ▶ Cues
58_Training_Device_Cue_Options	Develop	Projects ▶ Training Devices ▶ Sensory Cues ▶ Cues ▶ Options
59_Set-up_Attributes	Setup	Advanced Functions ▶ Setup Attributes
60_Attributes_Options	Setup	Advanced Functions ▶ Setup Attributes ▶ Options
61_Define_Search_Criteria	Setup	Advanced Functions ▶ Define Search Criteria
62_Project_Accounts	Setup	Project Accounts
63_Master_Skills	Setup	Personnel Templates ▶ Master Skills List
64_Master_Attributes	Setup	Personnel Templates ▶ Master Attributes List
65_Master_Activities	Setup	Personnel Templates ▶ Master Activities List
66_Implement_Projects	Implement	Projects
67_Implement_Project_Phases	Implement	Projects ▶ Phases
68_Implement_Project_Tasks	Implement	Projects ▶ Phases ▶ Tasks
69_Implement_Documents	Implement	Projects ▶ Phases ▶ Tasks ▶ Documents