



## Mission Analysis Step by Step Guide



## **ADVISOR Enterprise User's Guide**

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## Foreword

ADVISOR Enterprise is a Training Management System that drives training efficiency by (a) aligning current and future training activities to operational requirements to identify gaps, duplications and training with minimal value; (b) forecasting and comparing the costs of viable delivery options; (c) uncovering cost drivers; and (d) improving resource allocation. ADVISOR is built around the ADDIE model with the added flexibility of starting the analysis at any level. ADVISOR is made up of the following 6 modules that can be used separately or in any combination.

<b>Module #1</b> <b>Training Analysis</b>	<b>Analysis:</b> To find out <i>“who needs to be trained, on what and why”</i> . Improves training decisions by identifying and prioritizing knowledge, skills and competencies needed by each job (position) to meet organization missions and goals. In addition to establishing a clear line of sight between employees' tasks and organization goals, ADVISOR assesses the need and priority for training using the Difficulty, Importance and Frequency (DIF) model. [Mission Analysis, Competency Analysis, System Analysis, Job Task Analysis and Knowledge/Skill Gap Analysis].
<b>Module #2</b> <b>Training Design</b>	<b>Design:</b> To find out <i>“what is the most effective and economical way to deliver training”</i> . Improves training decisions by rating the effectiveness as well as forecasting and comparing the costs of alternate blends of delivery options. In addition to maximizing training efficiency, ADVISOR minimizes costly errors by assessing the risks and impact of eLearning and training devices on learners, learning and organization. [Media Analysis, Cost Analysis and Training Plans].
<b>Module #3</b> <b>Fidelity Analysis</b>	<b>Develop:</b> To find out the <i>“fidelity requirements of training devices”</i> . Determines the visual, tactile, olfactory, affective & auditory sensory cues requirements of training devices by taking into account who will use the training device; training requirements – i.e. the performance, enabling and learning objectives that will be addressed through the training device; synthetic environment requirements; and synthetic environment elements.
<b>Module #4</b> <b>Resource Management</b>	<b>Implementation:</b> To find out <i>“how much money and resources are needed”</i> . Maximizes training efficiency by accurately forecasting and comparing budget, personnel and resources required for one or multiple training programs using various blends of delivery options. In addition to improving training decisions, ADVISOR facilitates project planning and resource management by forecasting money and resources needed to develop, deliver, administer, manage, maintain and support training programs over life cycle. [Forecast and Optimize Training Budgets, Personnel and Resources].
<b>Module #5</b> <b>Project Management</b>	<b>Implementation:</b> To find out <i>“how training should be implemented”</i> . Keeps projects on time and within budget by developing program project plan, identifying critical paths/milestones, assigning personnel and resources as well as monitoring progress. In addition to anticipating potential problems and facilitating the implementation of corrective measures, ADVISOR improves resource allocation by tracking the utilization rates of personnel and resources. [Develop Project Plans and Track Progress].
<b>Module #6</b> <b>Performance Analysis</b>	<b>Evaluation:</b> To find out <i>“how training impacts performance and organizational goals”</i> . Improves performance by zeroing in on the source of the problem and identifying solutions that 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].

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## Chapter 1: Setup Projects

### 1.1 Introduction

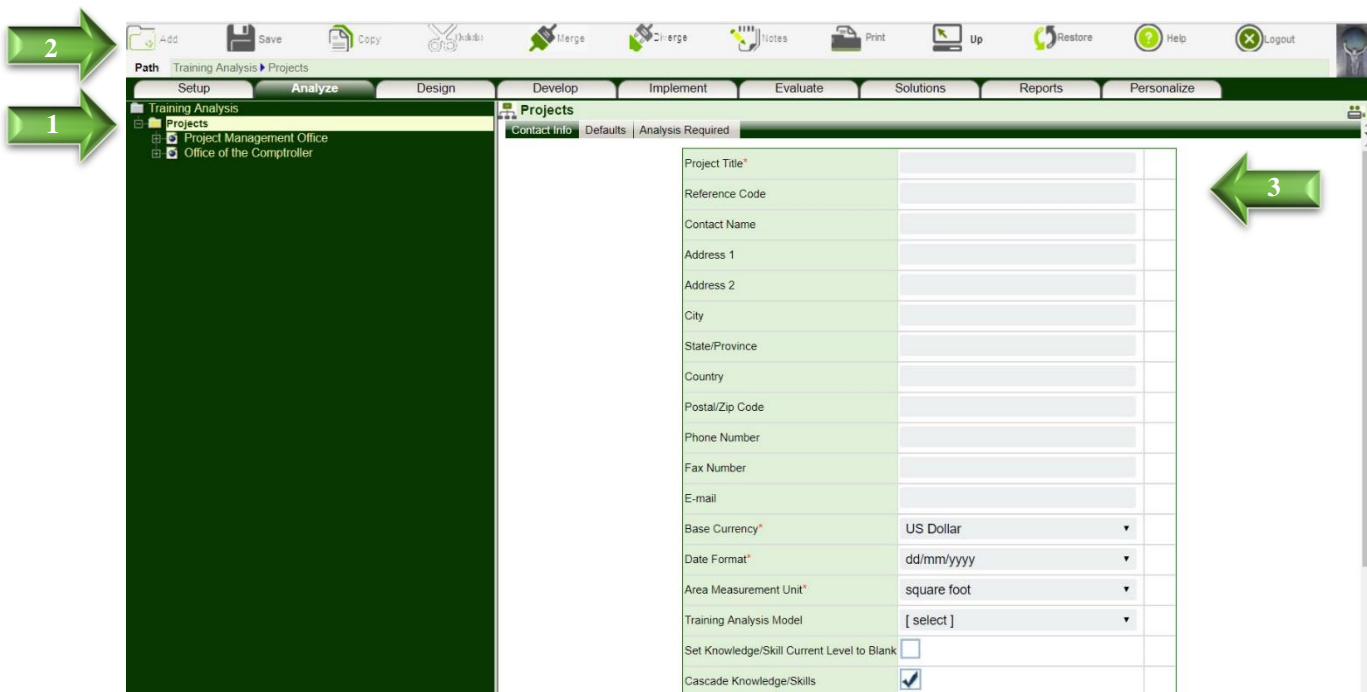
ADVISOR is highly flexible. Based on project requirements, the analysis may start by examining Missions/Goals, Systems, Competencies, Jobs or combinations. The current guide presents a step-by-step process to assist analysts in conducting Mission/Goal Analysis, Job Analysis and Task Analysis to identify training requirements. Separate Step-by-Step Guides are available for conducting Job Analysis, Competency/System Analysis, and therefore they will not be explicitly covered in this Step by Step Guide. For details on all analysis covered by ADVISOR Enterprise, please refer to the Training Analysis User Guide. For info on basic functionality and how to configure ADVISOR in line with needs, please refer to the Configure ADVISOR Step by Step or User Guide. Remember that context sensitive help for each screen is also available by clicking on the [Help] button.

### 1.2 Setup New Projects

**Step 1:** To create a new Project, click on the  **Projects** folder.

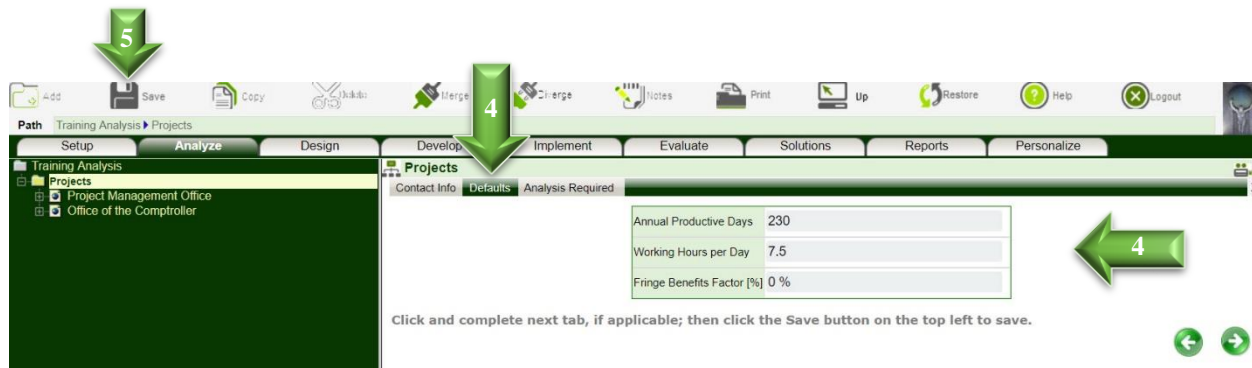
**Step 2:** Click the [Add] button.

**Step 3:** Input the Project Title, Contact Name and other info. Data required by ADVISOR is identified by a red asterisk (\*). Of course, the more data you provide, the better the results.



**Step 4:** Click on the **[Defaults]** tab to specify Annual Productive days, Working Hours per Day and Fringe Benefits Factor for the project. The Currency and Inflation Rate will cascade from the Client settings.

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





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

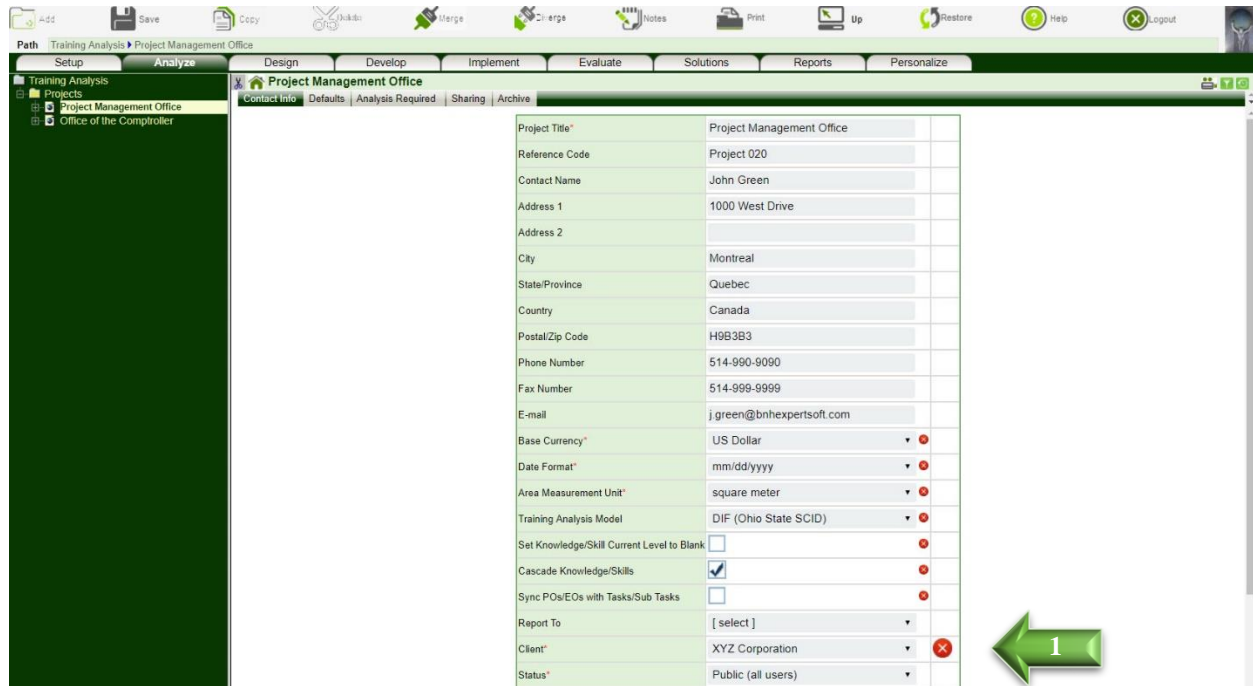
#### Notes:

- To edit an existing project, click on the **Projects** folder then click on the project's name. Make the required changes and click **[Save]**.
- You may also share your analysis with colleagues (i.e., Users assigned to the same Client) by clicking on the **[Sharing]** tab, placing checkmarks next to their names and clicking **[Save]**.









## 1.3 Configure Projects

To preserve consistency, all configurations including data to be collected, analysis to be conducted, and reports to be generated cascade from Client's Setup (See Configure ADVISOR: Step-by-Step Guide).

**Step 1:** Should you have the need to modify the configuration for a specific project, click on the  icon to turn the cascade off .



The screenshot shows the ADVISOR software interface with the 'Project Management Office' configuration form. The form includes fields for Project Title, Reference Code, Contact Name, Address, City, State/Province, Country, Postal/Zip Code, Phone Number, Fax Number, E-mail, Base Currency, Date Format, Area Measurement Unit, Training Analysis Model, Set Knowledge/Skill Current Level to Blank, Cascade Knowledge/Skills, Sync POs/EOs with Tasks/Sub Tasks, Report To, Client, and Status. A green arrow with the number 1 points to the 'Client' dropdown menu, which is set to 'XYZ Corporation' and has a red X icon next to it.

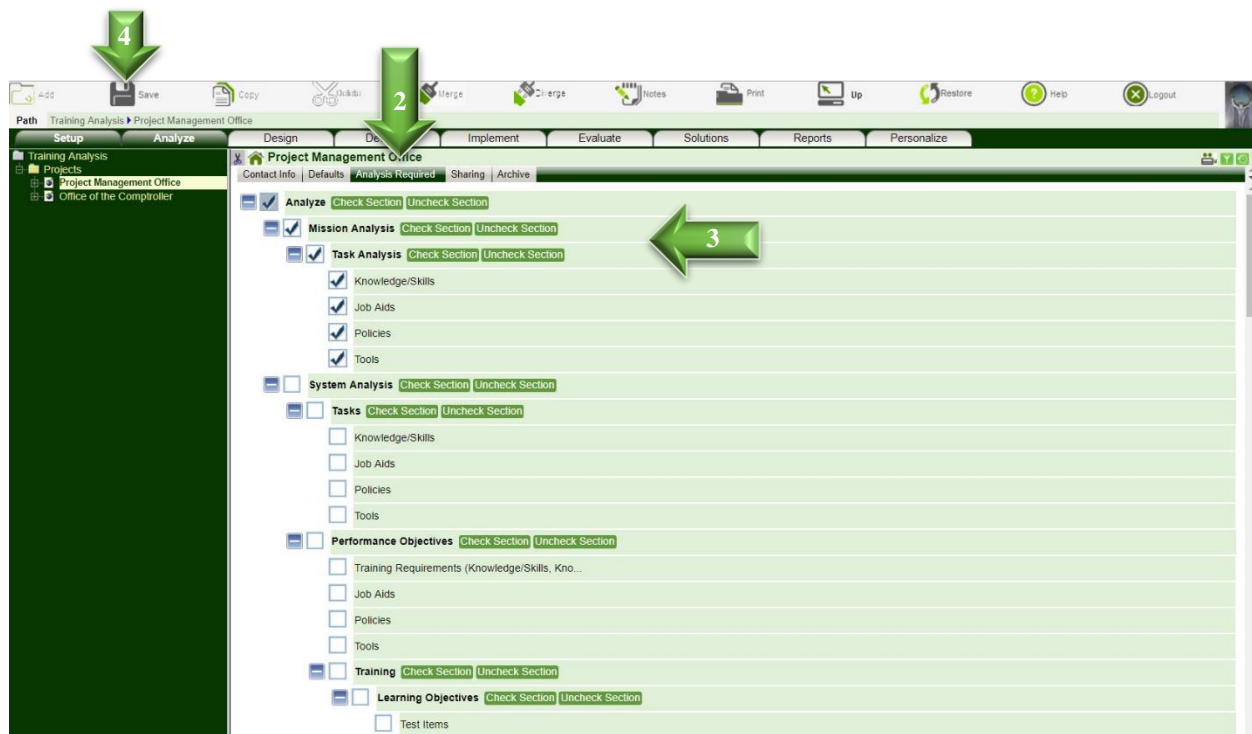
Project Title*	Project Management Office	
Reference Code	Project 020	
Contact Name	John Green	
Address 1	1000 West Drive	
Address 2		
City	Montreal	
State/Province	Quebec	
Country	Canada	
Postal/Zip Code	H9B3B3	
Phone Number	514-990-9090	
Fax Number	514-999-9999	
E-mail	j.green@bnhexpertsoft.com	
Base Currency*	US Dollar	
Date Format*	mm/dd/yyyy	
Area Measurement Unit*	square meter	
Training Analysis Model	DIF (Ohio State SCID)	
Set Knowledge/Skill Current Level to Blank	<input type="checkbox"/>	
Cascade Knowledge/Skills	<input checked="" type="checkbox"/>	
Sync POs/EOs with Tasks/Sub Tasks	<input type="checkbox"/>	
Report To	[ select ]	
Client*	XYZ Corporation	
Status*	Public (all users)	

**Step 2:** To specify data to be collected and analysis to be performed click on the **[Analysis Required]** tab.

**Step 3:** Place checkmarks next to the required items. Deselected items indicate that the analysis and data are not needed. ADVISOR will, in-turn, automatically hide nodes, tabs and fields that are no longer required, streamline data collection and reduce time required to conduct the analysis – a very effective way to configure ADVISOR in line with your needs.

**Step 4:** Click **[Save]** to save the configuration.

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

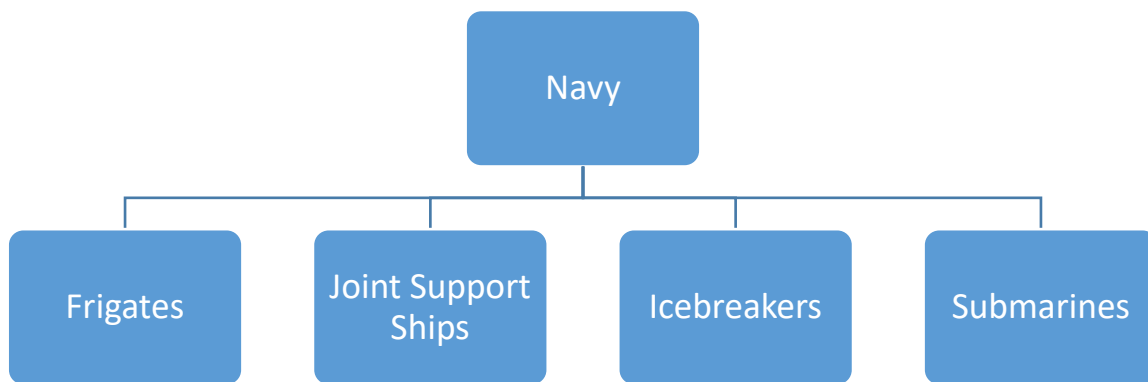




**Implication:** All fields corresponding to data and analysis not required will be automatically hidden for this project, to streamline the interface and reduce time needed to conduct the analysis.



## 1.4 Setup Project Segments

You may also subdivide and organize the data under each project in various segments, if needed. For example, if the project entails the assessment of training requirements within multiple units, departments, commands or platforms, you may subdivide the project into segments and sub segments, and organize the data accordingly. For example, a corporation (project) may be divided into the following segments: Sales, Marketing, IT, Operations and so forth. A Navy (project) may be subdivided into the following segments: Frigates, Joint Support Ships, Ice Breakers, Submarines, and so forth. Moreover, the impact of missions/goals within each segment (unit) on parent (organization) can also be defined.



**Step 1:** To set-up a Segment for a Project, click on the  **Segments** folder under the  **Projects** folder.

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

**Step 3:** Input the Project (Segment) Title, Contact Name and other information.

**Step 4:** Click **[Save]** to create the Segment.

**Path:** Training Analysis > Project Management Office > Quality Control Department

**Setup** | **Analyze** | **Design** | **Develop** | **Implement** | **Evaluate** | **Solutions** | **Reports** | **Personalize**

**Training Analysis**

- Project Management Office
  - Mission Analysis
    - Jobs Proficiency Levels
    - Project Tasks
    - Team Knowledge/Skills
    - Project Job Aids
    - Project Policies
    - Project Tools
    - Project References
    - Project Knowledge/Skills Attribution
    - Project Reports
    - Import Project Tasks
    - Search
    - Segments
    - Quality Control Department
    - Office of the Comptroller

**Quality Control Department**



**Contact Info** | **Defaults** | **Analysis Required** | **Sharing**

Project Title*	Quality Control Department
Reference Code	Project 021
Contact Name	Red Steel
Address 1	1000 West Drive
Address 2	
City	Montreal
State/Province	Quebec
Country	Canada
Postal/Zip Code	H3B3B3
Phone Number	514-880-8888
Fax Number	
E-mail	
Base Currency*	US Dollar
Date Format*	mm/dd/yyyy
Area Measurement Unit*	square meter
Training Analysis Model	DIF (Ohio State SCID)
Set Knowledge/Skill Current Level to Blank	
Cascade Knowledge/Skills	<input checked="" type="checkbox"/>
Sync POs/EOs with Tasks/Sub Tasks	
Report To	Project Management Office
Client*	XYZ Corporation ...
Status*	Public (all users)

## Chapter 2: Setup Missions & Goals

### 2.1 Setup Missions & Goals

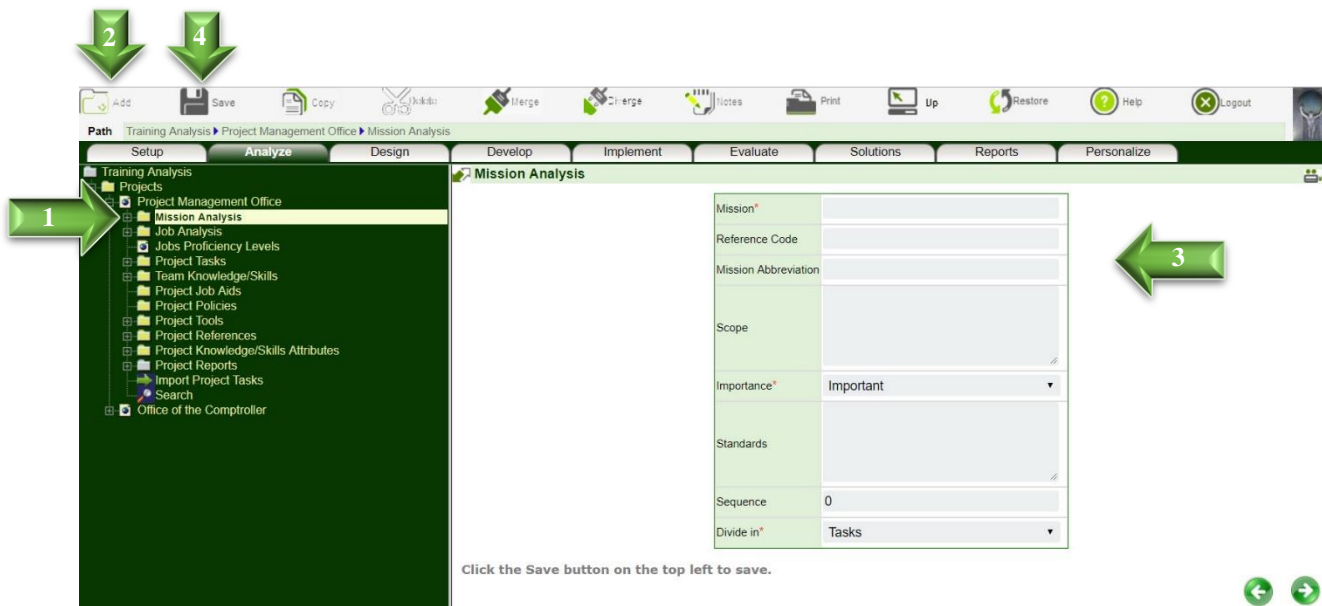
To identify the training needed to achieve missions/goals, find out where training budgets and resources should be allocated, as well as maximize training impact and demonstrate value, a clear understanding of missions/goals, tasks required to achieve these goals, as well as knowledge and skills needed to perform these tasks is needed.

**Step 1:** To identify and prioritize the missions/goals of a project, as well as how the missions/goals of each Segment support parent objectives, click on the  **Mission Analysis** folder under the  **(project or segment)** node.


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

**Step 3:** Input the Mission, Importance, Standards as well as other relevant data.

**Step 4:** Click **[Save]**, once all required information has been input.




Notes:

- To edit an existing mission/goal, click on the  **Mission Analysis** folder then click on the mission/goal. Make the required changes and click [**Save**].
- The significance of each mission/goal is indicated in the Importance field. The relative weight of each mission/goal is as follows: critical=4, very important=3, important=2 and somewhat important=1; and can be used to identify the most critical tasks, knowledge and skills and in-turn where money and resources should be allocated.
- The performance criterion for evaluating whether mission/goal is successfully achieved is specified in the Standards field. The statement should:
  - ☐ Indicate how well the mission/goal must be performed.
  - ☐ Include sufficient details to accurately communicate the requirement.
  - ☐ Be objective, observable and measurable.
  - ☐ Describe an acceptable product, process or both. Product standards are described in terms of quantity, accuracy, tolerances, completeness, format, errors and clarity. Process standards are described in terms of sequence, completeness, accuracy and speed of performance.
- The impact of segments mission/goal on project missions/goals is indicated under the [**Mission Impact**] tab of the Segments.

## 2.2 Define Missions Tasks

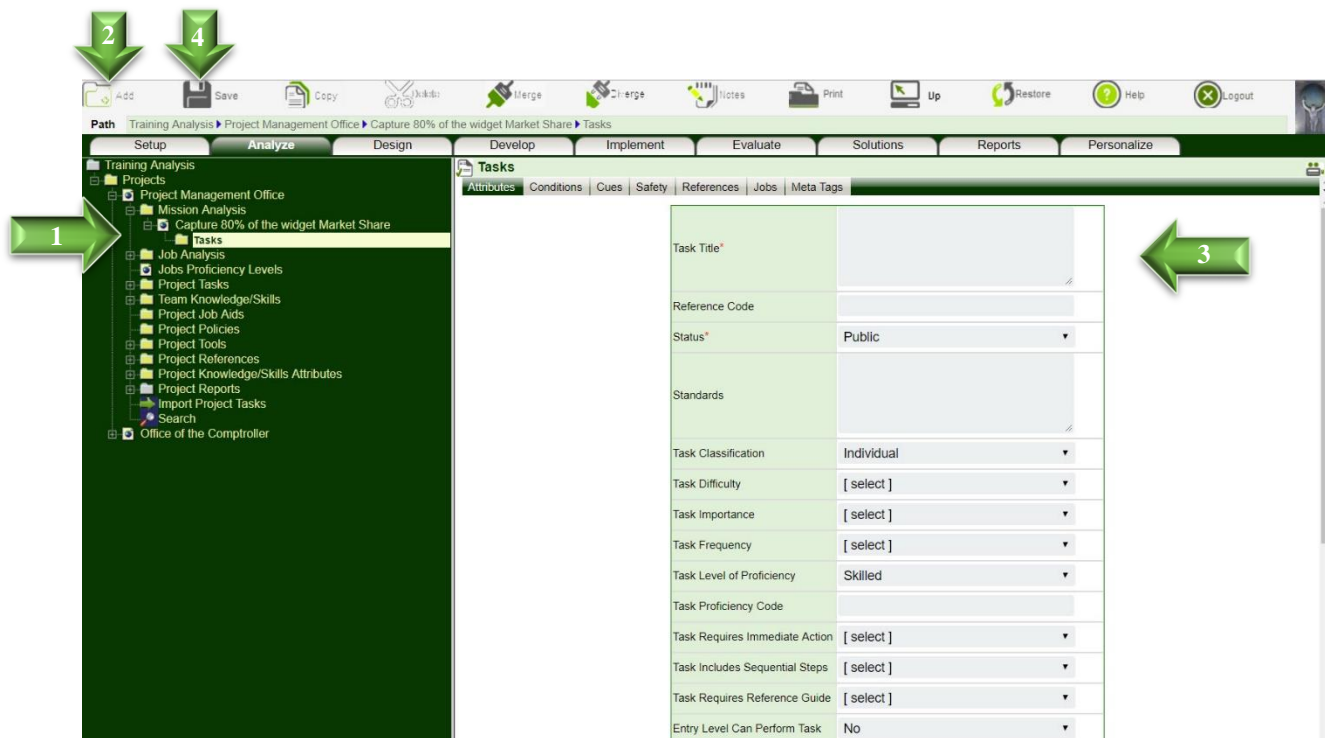
To identify the actions needed to achieve project's missions or goals, Tasks can be defined. Tasks can in turn be divided into Sub Tasks, Steps, Sub Steps. To define Tasks for Missions/Goals, Segments, Sub Segments and Functions select the Tasks option in the Divide In field.

**Step 1:** To add a new Task, click on the  **Tasks** folder.





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

**Step 3:** Input the Task Title, Standards, Difficulty, Importance and Frequency as well as other attributes.

**Step 4:** Click **[Save]**, once all required information has been input.



### Notes:

- If Jobs have been defined under the  **Job Analysis** folder (Section 3.1), the **[Jobs]** tab is displayed to allow Users to indicate who will be performing the Task. Each of the top three Task levels can be assigned to multiple Jobs.
- Four models are incorporated in ADVISOR to assess the training requirement for each Task as well as its priority based on Task Difficulty, Importance and Frequency. Factors considered in each of the models including decision matrix are presented in Section 3.4 of Training Analysis User Guide.
- Each time a Task is added, they are automatically compiled under the  **Project Tasks** folder.
- To minimize duplication, in lieu of adding tasks, user may review Tasks under  **Project Tasks** folder, by clicking on the **[Select]** tab under  **Tasks** folder, place checkmarks next to the required Tasks and click **[Save]** to add the Task.

- To facilitate data sharing and minimize the analysis effort, Users can search for and copy Tasks including attributes and hierarchy using the **[Search]** tab under the **Tasks** folder. Once again, please note that this does not imply that you can modify the original data.
- To edit the attributes of multiple Tasks, the Edit All function may be used.

## 2.3 Identify Knowledge, Skills and Attitudes

**Step 1:** To identify knowledge, skills and attitudes needed to perform the Task to the desired level, click on the **Knowledge/Skills** folder under the **(task)**.

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

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

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

The screenshot displays the BNH Expert Software interface. On the left, a tree view shows the hierarchy: Training Analysis > Project Management Office > Capture 80% of the widget Market Share > Perform Market Analysis > Knowledge/Skills. A green arrow labeled '1' points to the 'Knowledge/Skills' folder. Above the tree, two green arrows labeled '2' and '4' point to the 'Add' and 'Save' buttons respectively. On the right, the 'Knowledge/Skills' form is open, showing fields for Title, Reference Code, Learning Outcome, Classification, Knowledge/Skill Level, and Sequence. A green arrow labeled '3' points to the 'Add' button. Below the form, a note states: 'Click and complete next tab, if applicable; then click the Save button on the top left to save.'


Title *	Identify Market Segments
Reference Code	KSA 231
Learning Outcome*	Knowledge
Classification	Procedure
Knowledge/Skill Level	Skilled
Sequence	0

### Notes:

- Identifying knowledge, skill and attitude requirements for each Task will greatly simplify the process of uncovering knowledge/skill gaps – i.e., training needed.
- Each time a Knowledge, Skill or Attitude is added, they are automatically compiled under the **Team Knowledge/Skills** folder.
- To minimize duplication, in lieu of adding knowledge or skills, user may review Knowledge, Skills or Attitudes under **Team Knowledge/Skills** folder, by clicking on the **[Select]** tab under **Knowledge/Skills** folder, place checkmarks next to the required Knowledge/Skills and click **[Save]** to add under the Task.

## Chapter 3: Setup Jobs

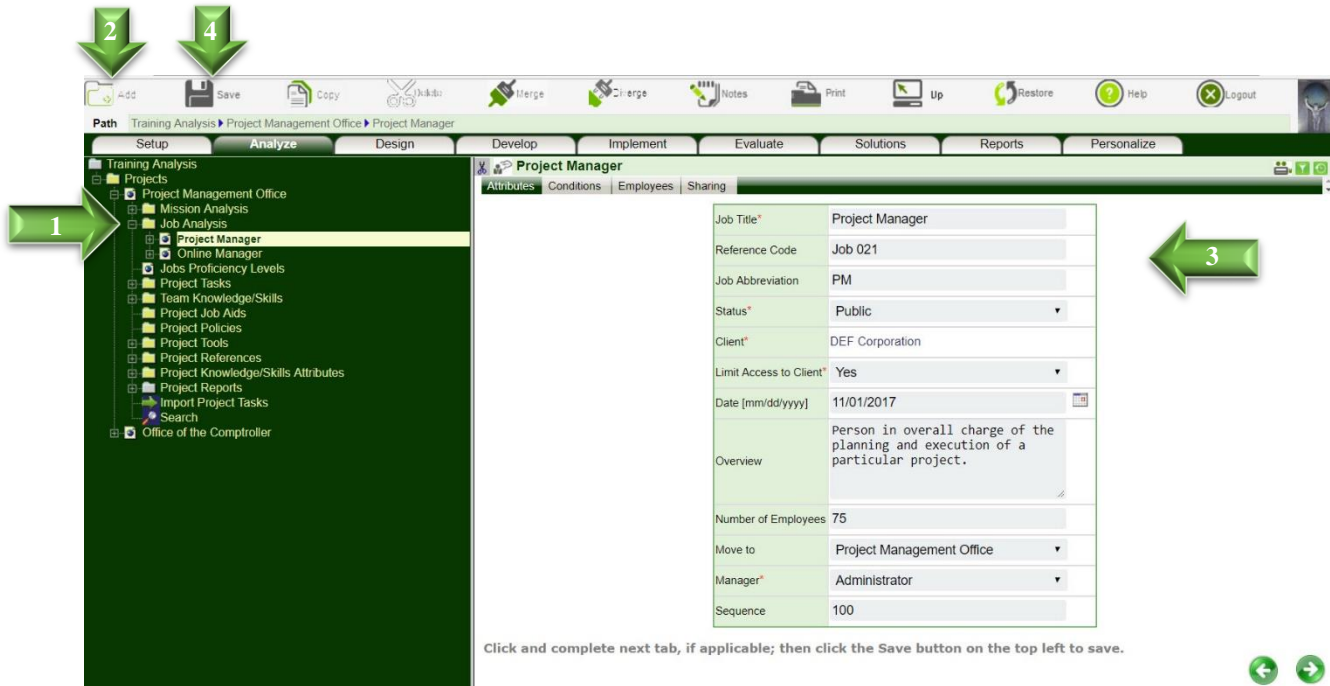
### 3.1 Setup Jobs

**Step 1:** To identify Jobs needed to achieve projects' missions/goals click on the  **Job Analysis** folder.




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

**Step 3:** Input the Job Title, a brief overview as well as other relevant data.

**Step 4:** Click **[Save]** to create the job.



#### Notes:



- To facilitate the analysis process, public Job Analyses (defined under Status field) are made available to other users (analysts) under the **[Search]** tab. Users may copy relevant analysis (including tasks, performance/enabling objectives, knowledge/skills, etc.) to their own projects. Note that making Job Analysis Public does not imply that others can make changes to your analysis – it simply implies that they can copy and reuse.
- The profile of each job, including financial data as well as instructional design characteristics that may impact the effectiveness of alternate delivery media can also be specified in this section by clicking on the  **Financial Data**,  **Characteristics**, or  **Attitude** nodes, completing relevant sections and clicking **[Save]**




## 3.2 Setup Job Tasks

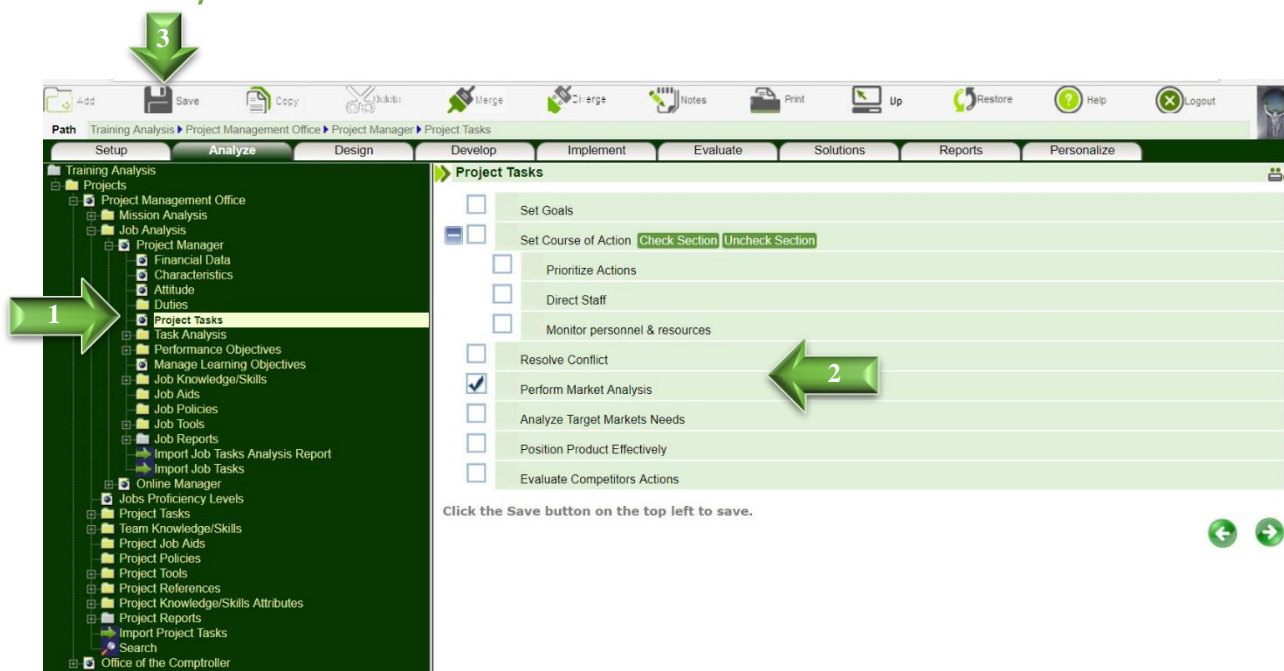
The tasks for each Job can be assembled from existing Mission Tasks or new tasks can be defined directly under the Job.

### Assign Mission Tasks



**Step 1:** To assign Mission Tasks, previously defined under the Mission (Section 2.2) to Jobs, simply click on the  **Project Tasks** node underneath the respective  **(job)** node.

**Step 2:** Select the Tasks you which to assign to the Job.

**Step 3:** Click **[Save]**. The tasks, along with their attributes, will automatically be copied to the  **Task Analysis** folder.



### Note:

- The Tasks may already be selected, if the job was selected under the **[Jobs]** Tab under the  **Mission Task** node (Section 2.2). In this case, simply click **[Save]** to copy the tasks to the  **Task Analysis** folder.



## Create New Job Tasks

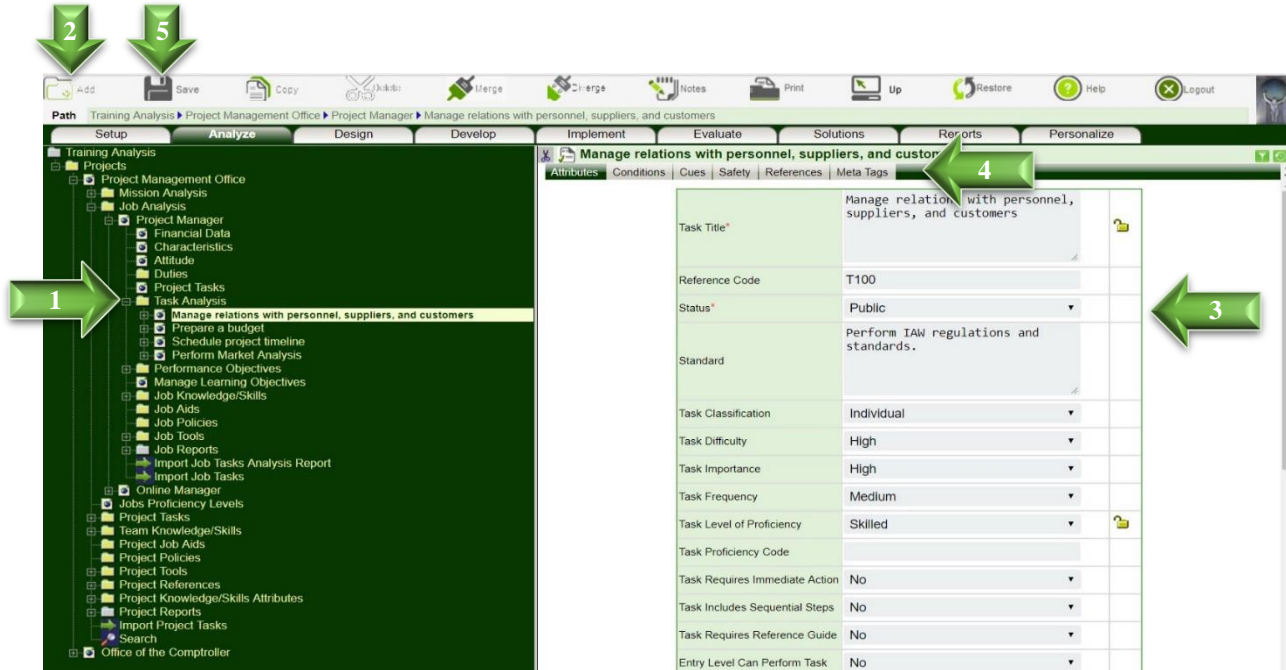
**Step 1:** To create a new task simply, click on the **Task Analysis** folder under the **(job)** node.

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

**Step 3:** Input the Task Title, Difficulty, Importance, Frequency as well as other attributes.

**Step 4:** Next, click on the **[Conditions]**, **[Cues]** and **[Safety]** tabs and complete.

**Step 5:** Click **[Save]** to create task.



### Notes:

- Based on Task's Difficulty, Importance and Frequency (DIF), Task Priority and Training Requirements are determined and presented under the **Training** node under each **(task)**. You may of course, override system's recommendations.
- Sub Divide Tasks: A Task can also be divided into Sub Tasks, Steps and Sub Steps. Since Individual Tasks require one individual to complete, each Task can only be assigned as a single unit (including all Sub Tasks) to a single Job. In other words, if a Task is divided into Sub Task A and Sub Task B, you cannot assign Sub Task A to Pilots for example, and Sub Task B to Maintainers.
- Search. To facilitate the analysis, a **[Search]** tab is presented on the **Task Analysis** folder. You can search for Tasks by Mission, System, Competency, Job or Keyword. To copy, place checkmarks next to the desired Tasks and click **[Save]**. All Sub Tasks as well as Knowledge and Skills associated with the selected Task are also copied.
- If References have been defined under the **Project References** folder (Chapter 5 of Training Analysis User Guide), a **[Reference]** tab will also appear after the **[Safety]** tab. Click the **[References]** Tab, select References and click **[Save]** to link Tasks to specific mandate, requirement, manual, etc., and in-turn document the reasoning behind the Task.


### 3.3 Define Performance and Enabling Objectives

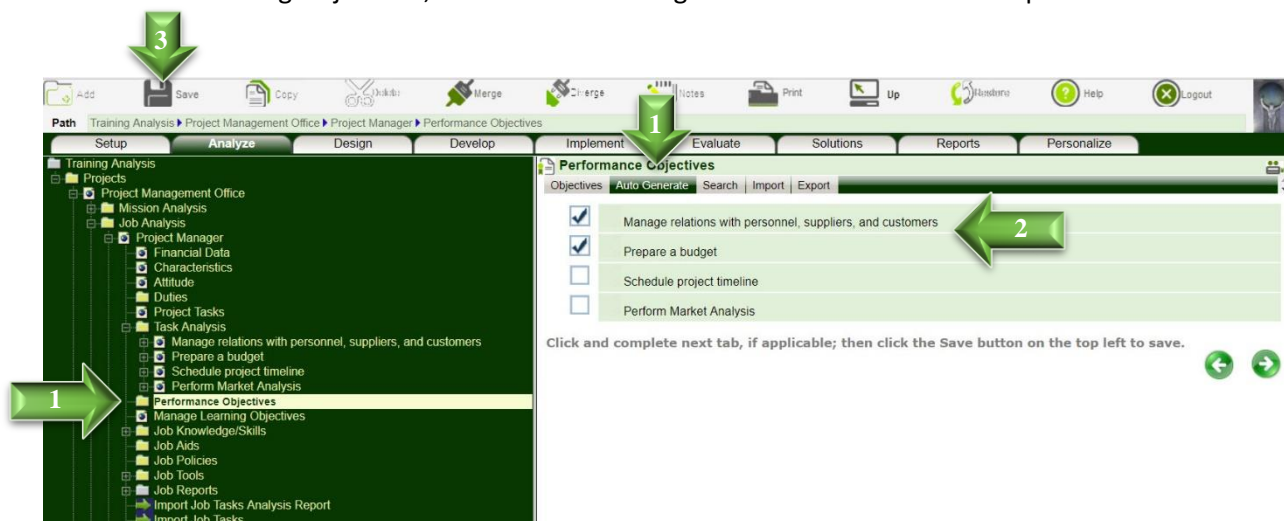
#### Auto Generate Performance Objectives

Tasks refer to activities that individuals are expected to perform on the job. Although individuals may require training on some Tasks in order to master, simpler Tasks with minimal impact may not require any training. In general, Performance Objectives can be viewed as Tasks that require training.



**Step 1:** Click the [Auto Generate] tab under the  **Performance Objectives** folder. To facilitate the creation of Performance and Enabling Objectives, Job Tasks are presented under this tab.

**Step 2:** Place checkmarks next to Tasks that require training.



**Step 3:** Click [Save] to automatically generate the corresponding Performance Objectives under the  **Performance Objectives** folder. Sub Tasks are in-turn translated into Enabling Objectives. In addition to cascading the attributes of each Task and Sub Task to the corresponding Performance and Enabling Objectives, associated Knowledge and Skills will also be transposed.



#### Note:

- To preserve data integrity, should the Job Task attributes change, they automatically cascade to all corresponding Performance Objective when the cascade option is turned on . You may of course turn the cascade option off , to make changes to the Performance Objective.

## Create New Performance Objectives

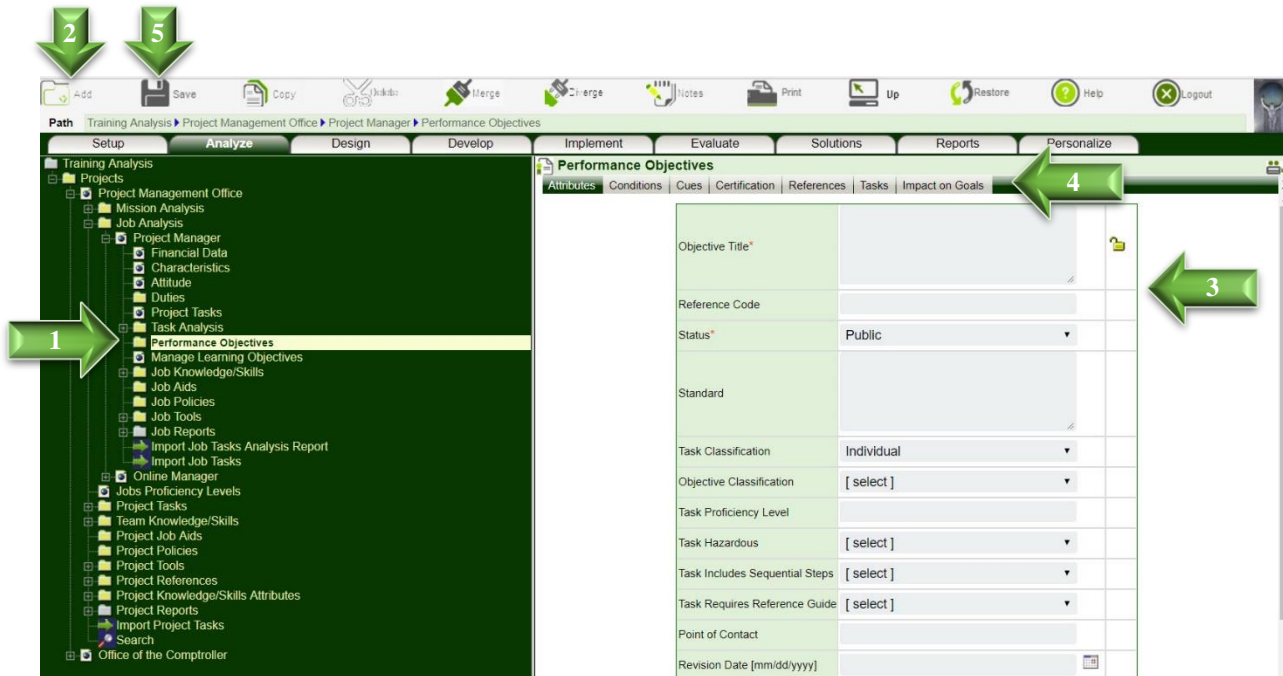
**Step 1:** You may also manually add Performance Objectives by clicking on the  **Performance Objectives** folder under the  (**job**) node.

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



**Step 3:** Input the Objective Title, Standards, as well as other attributes.



**Step 4:** Next, click on the **[Conditions]**, **[Cues]**, **[Certification]**, **[Tasks]** and **[Impact on Goals]** tabs and complete.

**Step 5:** Click **[Save]**, when ready, to create the Objective.



### Notes:

- Objective Priority and Training Requirements are dictated by Task or Sub Task that the Objective supports – i.e., indicated under the Align Attributes with Task field. They are presented under the  **Training** node under each  (**objective**).
- Sub Divide Objective: Performance Objective can also be divided into Enabling Objectives. Each Performance Objective can only be assigned as a single unit (including all Enabling Objectives) to a single Job. In other words, if a Performance Objective is divided into Enabling Objectives A and B, you cannot assign Enabling Objective A to Pilots for example, and Enabling Objective B to Maintainers.
- Status: To facilitate data sharing and minimize effort required to analyze Objectives, a Search function is provided to help analysts locate and copy existing Performance Objectives. Analysts can only search for and copy Objectives (but not edit or delete) that are classified as Public under the Status field. If the Performance Objective is classified as Private, it will not be accessible by the Search function.

- Impact on Goals fields indicate the significance of each Objective. The relative weight of each objective is assigned as follows: critical=4, very important=3, important=2 and somewhat important=1. Based on missions/goals and objectives weights, the relative impact of each objective and in-turn knowledge and skill is computed. In other words, which knowledge and skills are most critical and have the greatest impact on missions/goals.
- Search. To facilitate the analysis, a [**Search**] tab is also presented on the  **Performance Objectives** folder. You can search for Performance Objectives by System, Competency, Job or Keyword. To copy, place checkmarks next to the desired Performance Objectives and click [**Save**]. All Enabling Objectives as well as Knowledge and Skills associated with the selected Performance Objectives are also copied.
- If References have been defined under the  **Project References** folder, a [**Reference**] tab will also appear after the [**Certification**] tab to link Objectives to specific mandate, requirement, manual, etc. By establishing these links, in addition to documenting the reasoning behind the Objective, analysts can quickly identify which Objectives (including Knowledge, Skills, Attitudes, Job Aids, Policies and Tools) are affected – should there be a change in a specific mandate, requirement or manual.

### 3.4 Uncover Knowledge and Skill Gaps

#### Define POs/EOs Knowledge/Skills

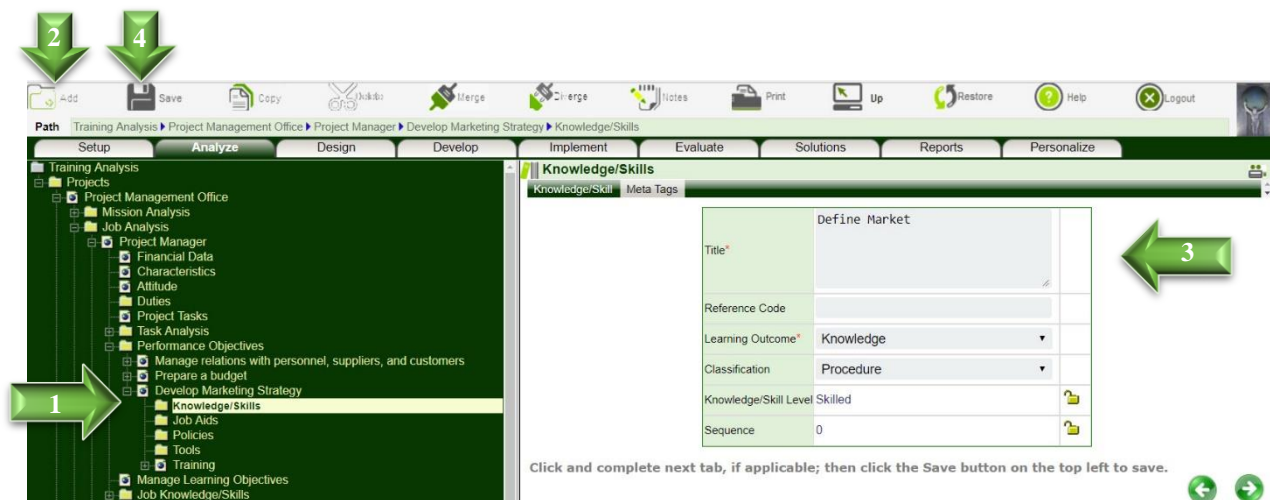
If the Performance Objective was created using the **[Auto Generate]** Tab, then all associated KSAs of the Task will be automatically copied to the **Knowledge/Skills** folder. Otherwise you can define the required knowledge and skills for the performance objective as follows.

**Step 1:** Click on the **Knowledge/Skills** folder to identify Knowledge/Skills needed to perform Objective.

**Step 2:** Click **[Add]** to define necessary KSAs.

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


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



#### Note:

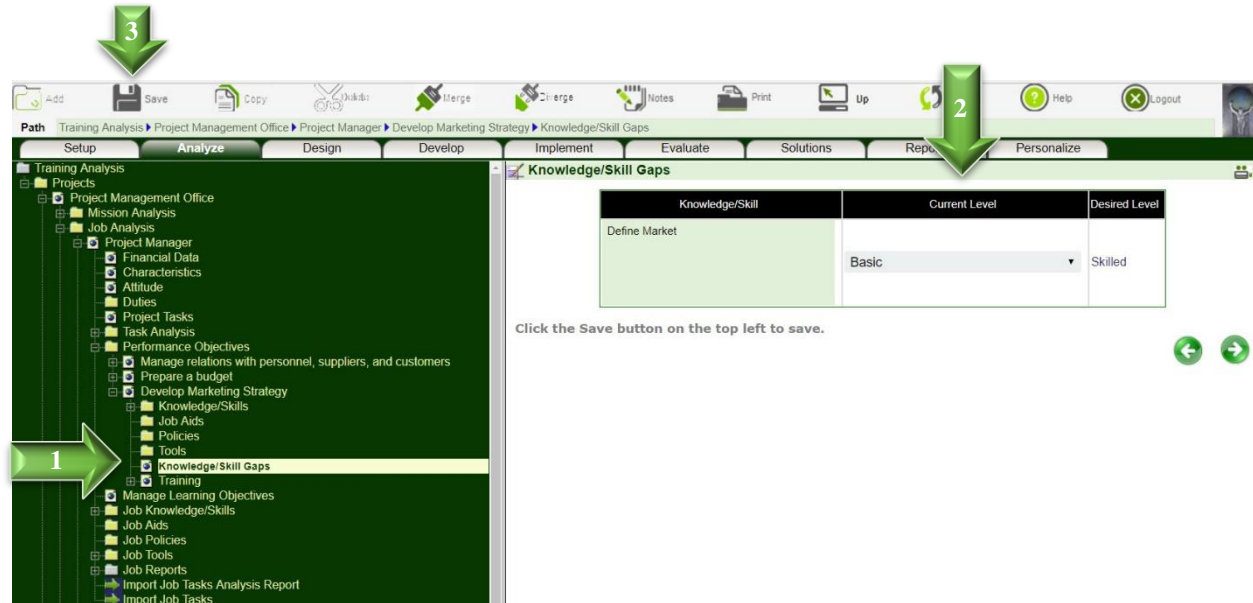
- Once a knowledge or skill is defined, the **Knowledge/Skills Gap** node is presented under the Performance Objectives folder to identify knowledge/skill gaps.

## Determine Knowledge/Skills Gaps




**Step 1:** To identify knowledge and skill gaps, click on the  **Knowledge/Skills Gap** node.

**Step 2:** Indicate the job's current knowledge and skill levels.

**Step 3:** Click [**Save**], to save the Knowledge Skills Gap Analysis.




### Notes:

- If desired level exceeds current level, a Knowledge/Skill gap is identified; and a Learning Objective is automatically created under the  **Learning Objectives** folder under the  **Training** node.
- The Knowledge/Skill background changes to green to indicate that a Learning Objective has been setup to address the gap.
- To indicate how the Knowledge/Skill Gap will be addressed, click on the  **Training** node, and select Formal Training, Workplace Training or Residual Training Gap.



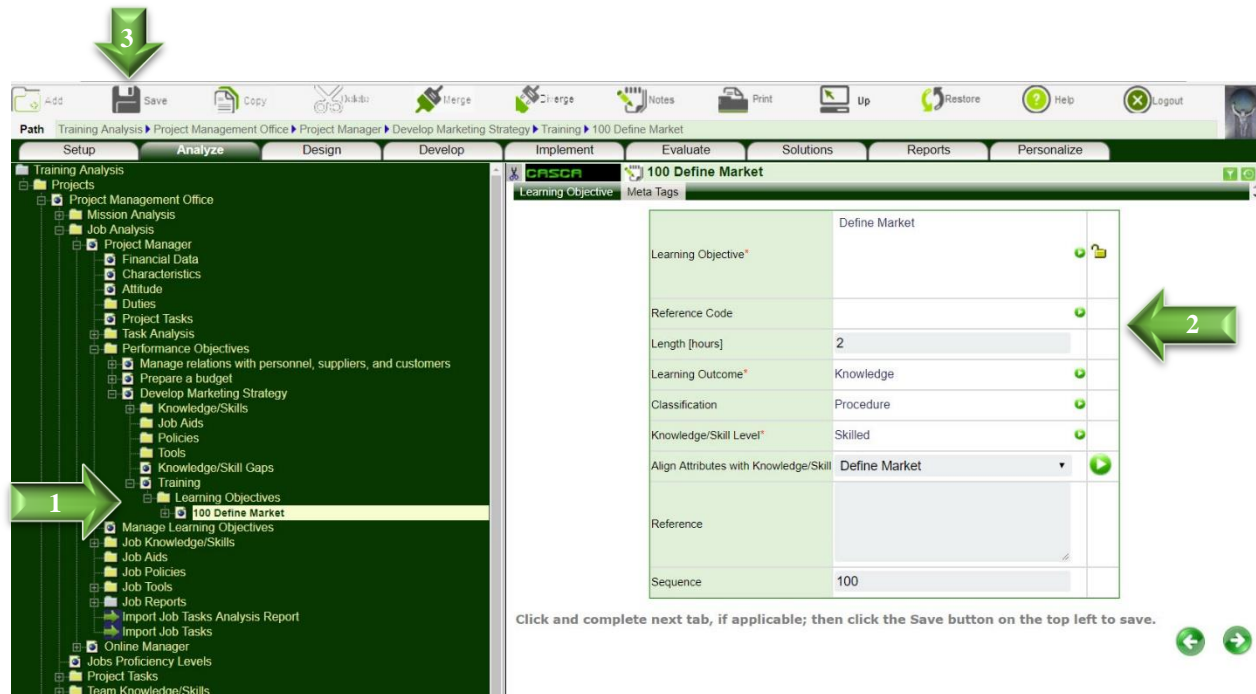
## Define Learning Objectives

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

**Step 1:** To indicate time needed to close the Knowledge/Skill Gap, click on the  (**learning objective**) node under the **Learning Objectives** folder.

**Step 2:** Input the Length and edit the Title if required.

**Step 3:** Click [**Save**], to save the Learning Objective characteristics.



The screenshot shows the BNH Expert Software interface. The left sidebar contains a tree view with the following structure:


- Training Analysis
  - Projects
    - Project Management Office
      - Mission Analysis
      - Job Analysis
        - Project Manager
          - Financial Data
          - Characteristics
          - Attitude
          - Duties
          - Project Tasks
          - Task Analysis
          - Performance Objectives
            - Manage relations with personnel, suppliers, and customers
            - Prepare a budget
            - Develop Marketing Strategy
              - Knowledge/Skills
                - Job Aids
                - Policies
                - Tools
                - Knowledge/Skill Gaps
                - Training
                  - Learning Objectives
                    - 100 Define Market (highlighted by arrow 1)
                    - Manage Learning Objectives
                    - Job Knowledge/Skills
                    - Job Aids
                    - Job Policies
                    - Job Tools
                    - Job Reports
                    - Import Job Tasks Analysis Report
                    - Import Job Tasks
                  - Online Manager
                  - Jobs Proficiency Levels
                  - Project Tasks
                  - Team Knowledge/Skills

The main window displays the '100 Define Market' form. The form has a 'Meta Tags' tab. The fields are as follows:

| Field                                 | Value         | Status                  |
|---------------------------------------|---------------|-------------------------|
| Learning Objective*                   | Define Market | Valid (green checkmark) |
| Reference Code                        |               | Valid (green checkmark) |
| Length [hours]                        | 2             | Valid (green checkmark) |
| Learning Outcome*                     | Knowledge     | Valid (green checkmark) |
| Classification                        | Procedure     | Valid (green checkmark) |
| Knowledge/Skill Level*                | Skilled       | Valid (green checkmark) |
| Align Attributes with Knowledge/Skill | Define Market | Valid (green checkmark) |
| Reference                             |               |                         |
| Sequence                              | 100           |                         |

Below the form, there is a note: "Click and complete next tab, if applicable; then click the Save button on the top left to save." and two navigation buttons (back and forward).

### Notes:



- To add a new Learning Objective (Teaching Point), click on the  **Learning Objectives** folder, and then click [**Add**]. You will be prompted for the Learning Objective Title, Length, Learning Outcome, Classification and Knowledge/Skill Level. Input the required fields and click [**Save**].
- Learning Objective can be assembled in courses/training programs. Defining Learning Objectives is therefore critical for establishing clear links between training programs, objectives, tasks and missions/goals, demonstrating the value of various training programs and aligning training with project goals.

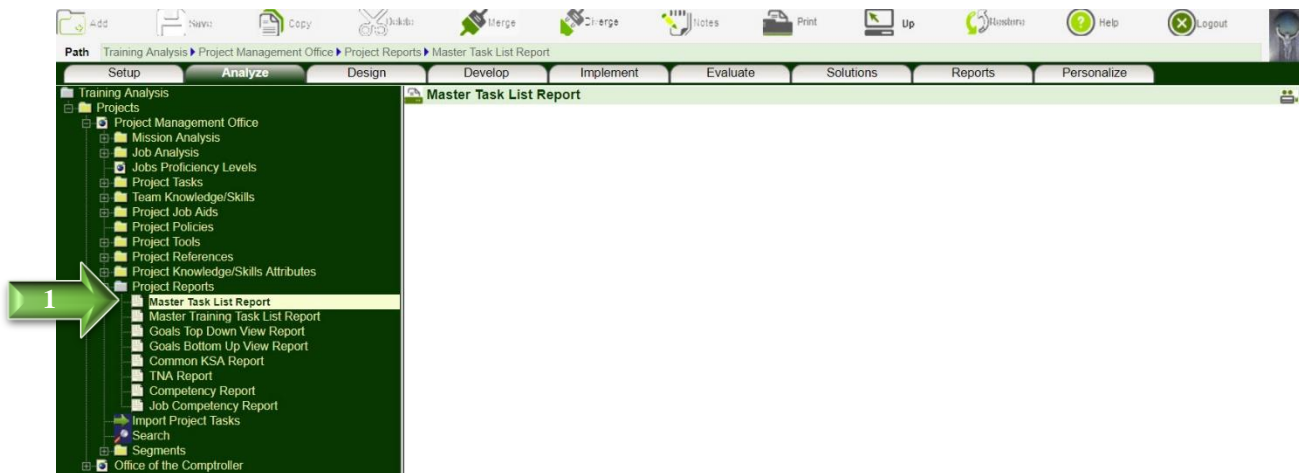
## Chapter 4: Generate Reports

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

### 4.1 Master Task List Report

Generates a detailed breakdown of each Mission including Segments, Sub Segments, and Functions as well as Tasks, Sub Tasks, Steps and Sub Steps along with Standards, Conditions and who performs each for the Tasks.

**Step 1:** To generate the Master Task Report, click on the  **Master Task List Report** node under the  **Project Reports** folder.



**Step 2:** You may export the report to Excel, by clicking the **[Generate Excel]** button (top left corner). To return to ADVISOR, close the Report window.

  **Master Task List Report**



Project: Project Management Office  
 Prepared by: Administrator  
 Date: 23 January 2018 09:58 AM

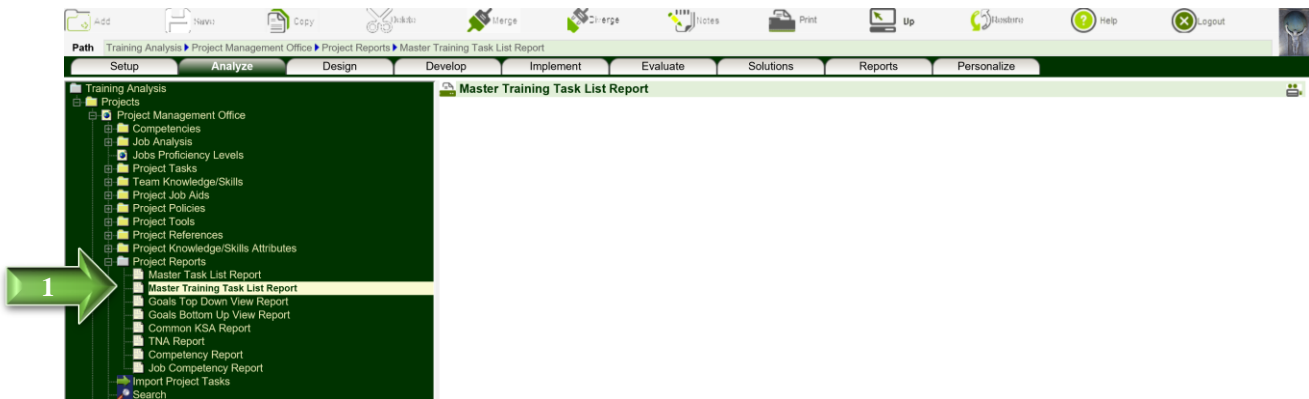
| Mission Analysis                       | Segment                                       | Reference Code | Project Tasks                | Standards | Conditions | Triggering Action | Task Classification | Task Level of Proficiency | Personnel Safety | Jobs | Project Manager | Online Manager |
|--|---|----------------|------------------------------|-----------|------------|-------------------|---------------------|---------------------------|------------------|------|-----------------|----------------|
| Capture 80% of the widget Market Share |   |                | Perform Market Analysis      |           |            |                   | Individual          | Skilled                   |                  |      | x               |                |
|  |   |                | Analyze Target Markets Needs |           |            |                   | Individual          | Skilled                   |                  |      | x               | x              |
|  |   |                | Position Product Effectively |           |            |                   | Individual          | Skilled                   |                  |      | x               | x              |
|  |   |                | Evaluate Competitors Actions |           |            |                   | Individual          | Skilled                   |                  |      | x               | x              |
| Lower Employee Turnover to 5% Annually |   |                |                              |           |            |                   |                     |                           |                  |      |                 |                |
|  | Hire Best Fit Candidate for all New Roles     |                |                              |           |            |                   |                     |                           |                  |      |                 |                |
|  | Implement Effective Employee Incentive System |                |                              |           |            |                   |                     |                           |                  |      |                 |                |
|  | Create Career Plan for Each Employee          |                |                              |           |            |                   |                     |                           |                  |      |                 |                |




## 4.2 Master Training Task List Report

Generates a detailed breakdown of each Mission including Segments, Sub Segments, and Functions as well as Tasks, Sub Tasks, Steps and Sub Steps along with Standards, Conditions, Task Difficulty, Importance and Frequency, Training Requirement and other attributes.

**Step 1:** To generate the Master Training Task List Report, click on the  **Master Training Task List Report** node under the  **Project Reports** folder.



**Step 2:** You may export the report to Excel, by clicking the **[Generate Excel]** button (top left corner). To return to ADVISOR, close the Report window.





**Master Training Task List Report**

Project: Project Management Office  
Prepared by: J Bahis  
Date: 13 February 2018 12:47 PM

| Mission                                | Segment | Reference Code | Project Tasks                                 | Standards | Conditions | Triggering Action | Task Difficulty | Task Importance | Task Frequency | Training Level | Task Requires Immediate Action | % of Individuals Performing Task | Time Spent Performing Task | Task Classification | Task Level of Proficiency | Personnel Safety | Jobs | Project Manager | Online Manager |
|--|---------|----------------|---|-----------|------------|-------------------|-----------------|-----------------|----------------|----------------|--------------------------------|----------------------------------|----------------------------|---------------------|---------------------------|------------------|------|-----------------|----------------|
| Capture 80% of the widget Market Share |         |                | Perform Market Analysis                       |           |            |                   | Medium          | High            | Low            | Level 1        |                                |                                  |                            | Individual          | Skilled                   |                  | x    |                 |                |
|  |         |                | Analyze Target Markets Needs                  |           |            |                   | High            | High            | Low            | Level 1        |                                |                                  |                            | Individual          | Skilled                   |                  | x    | x               |                |
|  |         |                | Position Product Effectively                  |           |            |                   | Medium          | Medium          | Medium         | Level 2        |                                |                                  |                            | Individual          | Skilled                   |                  | x    | x               |                |
|  |         |                | Evaluate Competitors Actions                  |           |            |                   | Medium          | Medium          | Low            | Level 2        |                                |                                  |                            | Individual          | Skilled                   |                  | x    | x               |                |
| Lower Employee Turnover to 5% Annually |         |                |   |           |            |                   |                 |                 |                |                |                                |                                  |                            |                     |                           |                  |      |                 |                |
|  |         |                | Hire Best Fit Candidate for all New Roles     |           |            |                   |                 |                 |                |                |                                |                                  |                            |                     |                           |                  |      |                 |                |
|  |         |                | Implement Effective Employee Incentive System |           |            |                   |                 |                 |                |                |                                |                                  |                            |                     |                           |                  |      |                 |                |
|  |         |                | Create Career Plan for Each Employee          |           |            |                   |                 |                 |                |                |                                |                                  |                            |                     |                           |                  |      |                 |                |

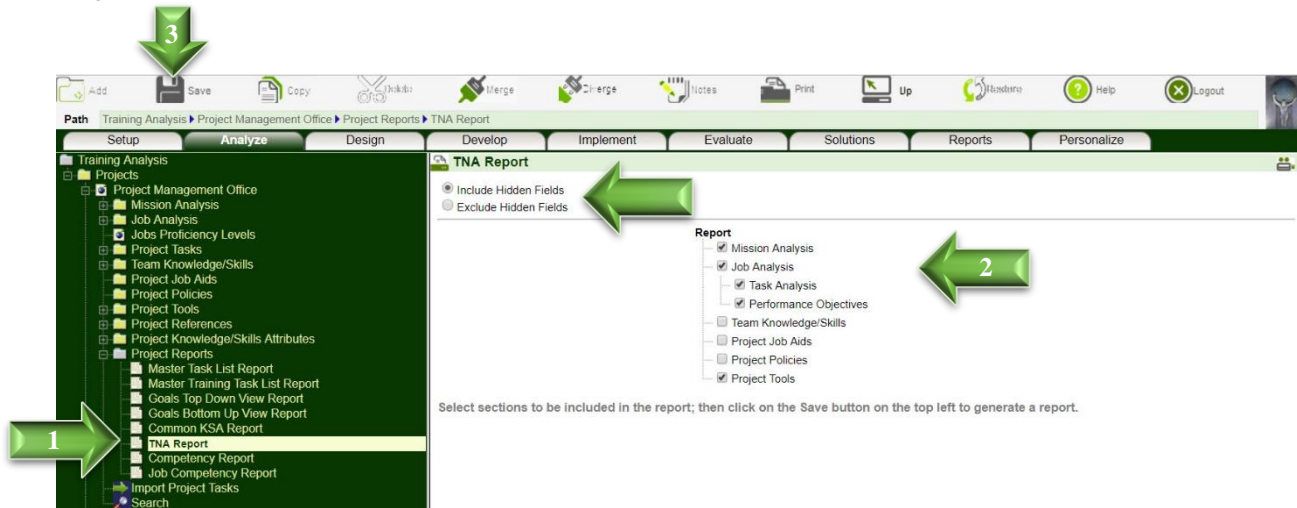
### 4.3 Training Needs Analysis Report

To generate a comprehensive report of missions/goals, tasks performed by each job, as well as attributes.

**Step 1:** To generate a Training Needs Analysis report, click on the  **TNA Report** node under the  **Projects Reports** folder.

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

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





#### Notes:

- If Exclude Hidden Fields is selected, all hidden fields will not be included in the report.
- Since the report is in html format, you can quickly advance to any section by clicking on the corresponding title in the Table of Contents. You may print or save the report using the corresponding functions in your Browser. To return to ADVISOR, close the Report window.

## 4.4 Goals Top Down View & Goals Bottom Up View Reports

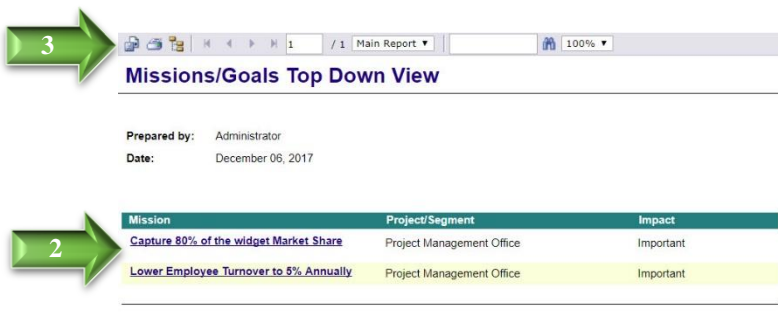
Goals Top Down and Goals Bottom Up Reports generate a concise view of the organization's (project's) missions and goals, as well as how the missions/goals of underlying divisions (segments) support the organization (project) in achieving its missions and goals. In other words, the hierarchy of the organization (project) and its divisions (segments) is displayed in a top down view or bottom up view in order to demonstrate how the organization's (project's) missions and goals are supported.

**Step 1:** To generate a top down view of which tasks support a specific mission and goal, and who is performing the Tasks, click on project  [Goals Top Down View Report] under the  Project Reports folder.





**Step 2:** Since the report is in html format, you can click (drill down) on each mission/goal to find out the Tasks performed by various jobs (positions) in support of each mission/goal.

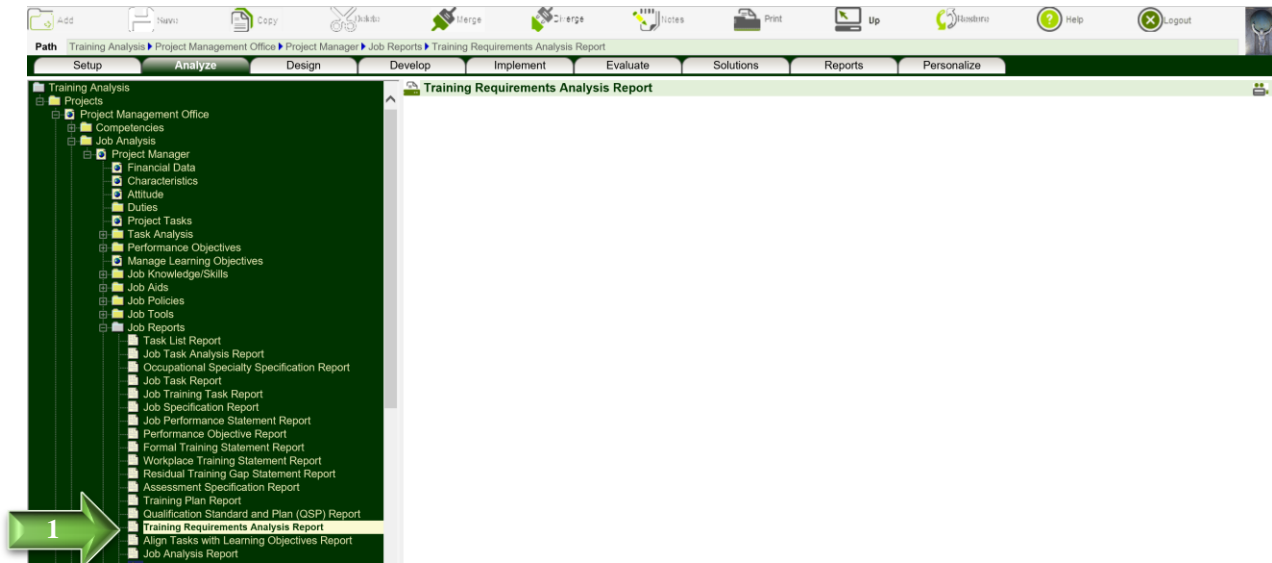
**Step 3:** You may print and/or save the report using the corresponding export and print icons. To return to ADVISOR, close the Report window.





## 4.5 Training Requirements Analysis Report

Generates the training requirements for each Job, including the Knowledge, Skills and Attitudes needed by each Performance and Enabling Objective, their classification, as well as Entry and Desired Competency Levels and Gaps.

**Step 1:** To generate the Training Analysis Report, click on  **Training Requirements Analysis Report** under the  **Job Reports** folder.



**Step 2:** You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner). To return to ADVISOR, close the Report window.

**Training Requirements Analysis Report**

Job Profile: Project Manager  
 Prepared by: J Bahlis  
 Date: 13 February 2018 12:05 PM

| Performance Objective                                     | Enabling Objective        | Knowledge/Skills                           | Learning Outcome | Classification  | Entry Level | Desired Level | Gap |
|---|---------------------------|--|------------------|-----------------|-------------|---------------|-----|
| Manage relations with personnel, suppliers, and customers |                           | Assess best venue for motivating employees | Knowledge        | Procedure       | Basic       | Skilled       | 2   |
|   |                           | List negotiation tactics                   | Knowledge        | Procedure       | Basic       | Skilled       | 2   |
|   |                           | Identify non verbal cues                   | Knowledge        | Problem Solving | Basic       | Skilled       | 2   |
|   |                           | Analyze non verbal cues                    | Knowledge        | Problem Solving | Basic       | Skilled       | 2   |
|   | Assign tasks to personnel |  |                  |                 |             |               |     |
|   | Evaluate suppliers needs  |  |                  |                 |             |               |     |
|   | Evaluate customers needs  |  |                  |                 |             |               |     |
| Prepare a budget  |                           | Categorize Expenses                        | Knowledge        | Procedure       | Basic       | Skilled       | 2   |
|   |                           | Generate Budget Reports                    | Knowledge        | Procedure       | Basic       | Skilled       | 2   |
|   |                           | Balance Budget                             | Knowledge        | Procedure       | Basic       | Skilled       | 2   |
|   |                           | Categorize Revenues                        | Knowledge        | Procedure       | Basic       | Skilled       | 2   |
|   | Estimate costs            |  |                  |                 |             |               |     |
|   | Perform risk analysis     |  |                  |                 |             |               |     |
|   | Manage risk and issues    |  |                  |                 |             |               |     |

**Note:**

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

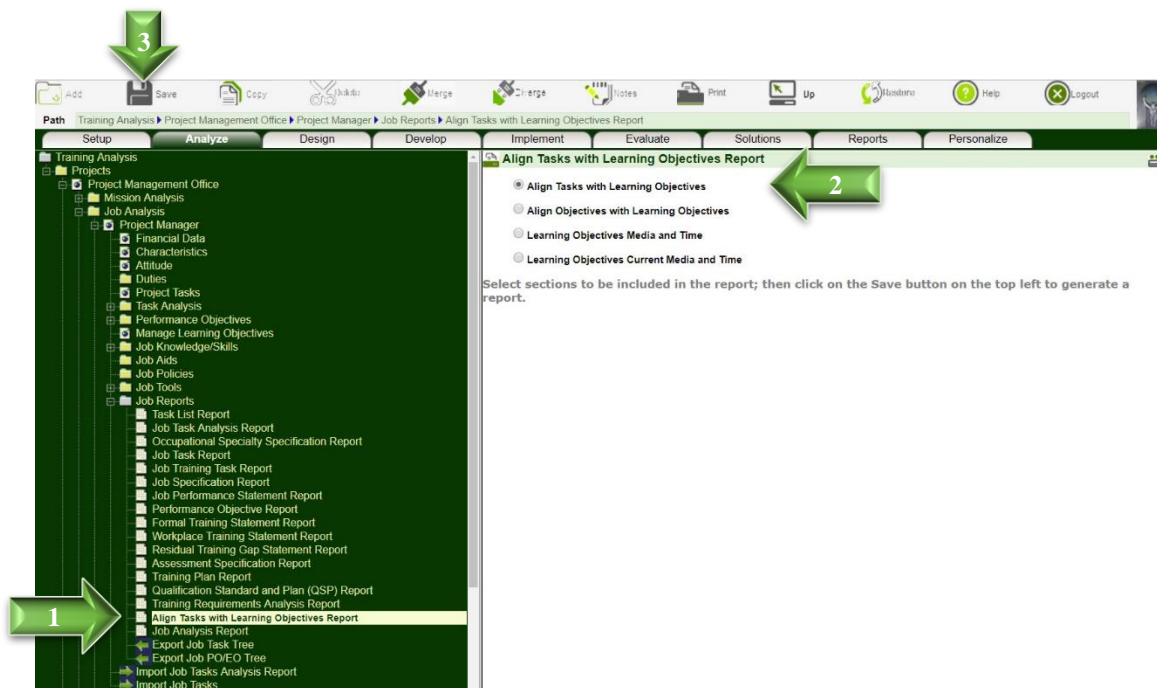
## 4.6 Align Tasks with Learning Objectives Reports

To generate audit report and validate that all requirements have been adequately addressed. In other words, how and where the requirements of each Task or Performance Objective are being addressed. The reports may also be used to find out how teaching points have been derived. To generate:

**Step 1:** Click on  **Align Tasks with Learning Objectives Report** node under the  **Job Reports** folder.

**Step 2:** Select which audit report you wish to generate, for example the Align Tasks with Learning Objectives.


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



Note:

- The results are presented in a Tabular format.

**Step 4:** You may export the report to Excel, by clicking the **[Generate Excel]** button (top left corner). To return to ADVISOR, close the Report window.

**Generate Excel** 

**Align Tasks with Learning Objectives Report**

Job Profile: Project Manager  
Prepared by: Administrator  
Date: 06 December 2017 01:51 PM

**Align Tasks with Learning Objectives**

| Task  | Sub Task                  | Training Requirement | Performance/Enabling Objective                            | Training Allocation | Knowledge/Skills                           | Gap | Learning Objectives                        | Lesson | Courses                |
|---|---------------------------|----------------------|---|---------------------|--|-----|--|--------|------------------------|
| Manage relations with personnel, suppliers, and customers |                           | Train                | Manage relations with personnel, suppliers, and customers | Formal Training     | Assess best venue for motivating employees | Yes | Assess best venue for motivating employees |        | Project Management 101 |
|   |                           |                      |   |                     | List negotiation tactics                   | Yes | List negotiation tactics                   |        | Project Management 101 |
|   |                           |                      |   |                     | Identify non verbal cues                   | Yes | Identify non verbal cues                   |        | Project Management 101 |
|   |                           |                      |   |                     | Analyze non verbal cues                    | Yes | Analyze non verbal cues                    |        | Project Management 101 |
|   | Assign tasks to personnel | Train                | Assign tasks to personnel                                 | Formal Training     |  |     |  |        |                        |
|   | Evaluate suppliers needs  | Train                | Evaluate suppliers needs                                  | Formal Training     |  |     |  |        |                        |
|   | Evaluate customers needs  | Train                | Evaluate customers needs                                  | Formal Training     |  |     |  |        |                        |
| Prepare a budget  |                           | Train                | Prepare a budget  | Formal Training     | Categorize Expenses                        | Yes | Categorize Expenses                        |        | Project Management 101 |
|   |                           |                      |   |                     | Categorize Revenues                        | Yes | Categorize Revenues                        |        | Project Management 101 |
|   |                           |                      |   |                     | Balance Budget                             | Yes | Balance Budget                             |        | Project Management 101 |
|   |                           |                      |   |                     | Generate Budget                            | Yes | Generate Budget                            |        | Project Management 101 |

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