



Resource Management User 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.

Module #1 Training Analysis

Analysis: To find out *“who needs to be trained, on what and why”*. Provides a step by step approach for conducting Training Needs Analysis (TNA) or Training Systems Requirements Analysis (TSRA) to identify training needed by each job, position and employee to perform duties to the desired standard under the prescribed conditions. Four approaches may be used to conduct training analysis, namely Mission, System, Competency or Job. [Mission Analysis, Competency Analysis, System Analysis, Job Task Analysis, Knowledge/Skill Gap Analysis and Training Requirements Analysis].

Module #2 Training Design

Design: To find out *“what is the most effective and economical way to deliver training”*. Provides a step by step approach for conducting Training Media Analysis (TMA) or Option Analysis to identify the most cost effective strategy for the delivery of training and generates 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].

Module #3 Fidelity Analysis

Develop: To find out the *“fidelity requirements of training devices”*. Provides a step by step approach for assessing the functional requirements of trainers and simulators based on training needs and performance objectives. It identifies visual, tactile, olfactory, affective and auditory sensory cues needed to practice tasks, within realistic environments, under preset conditions to attain the desired level of competency. In addition, ADVISOR takes into account elements within the virtual world and how users interact with each.

Module #4 Resource Management

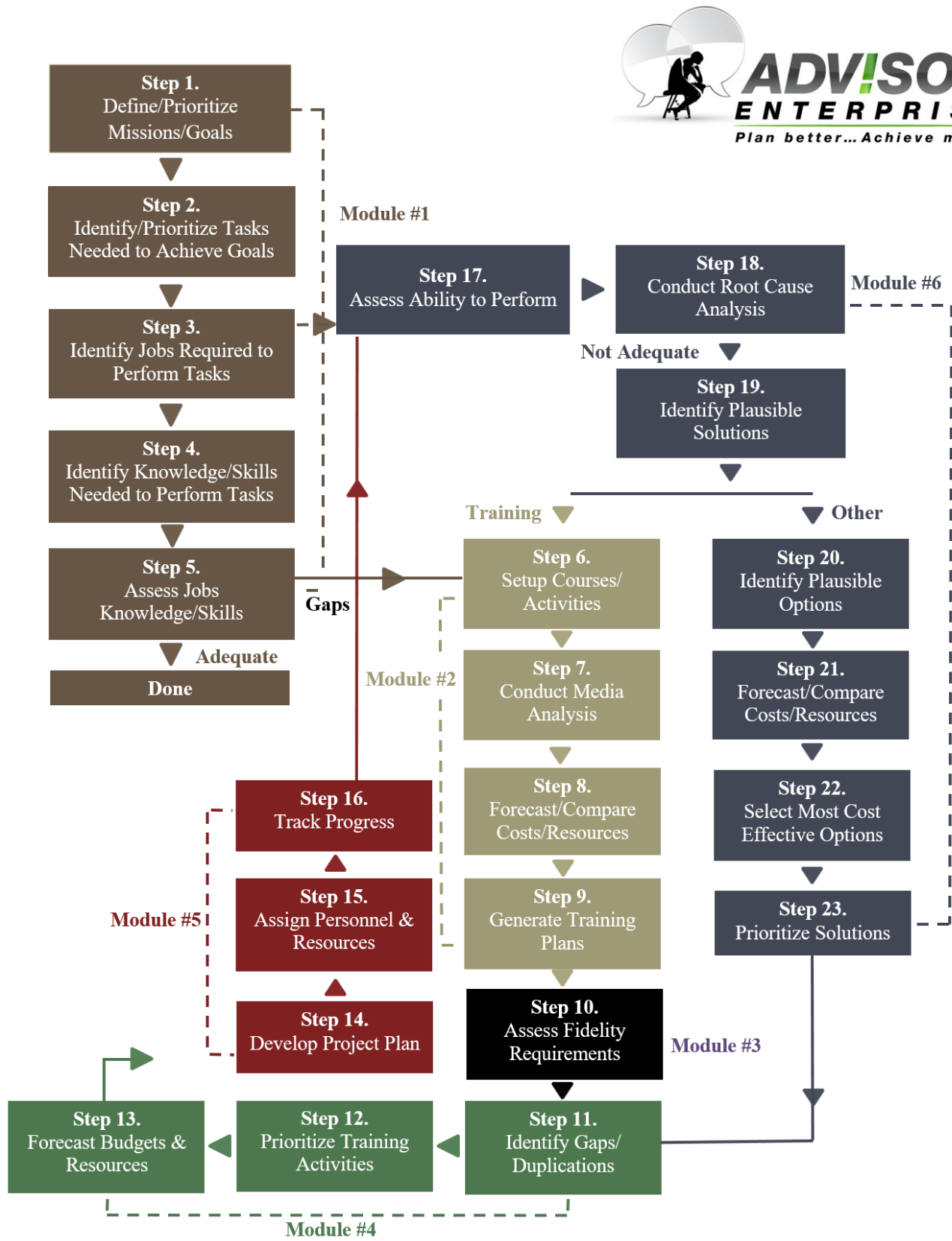
Implementation: To find out *“how much money and resources are needed”*. Compiles and analyzes missions/goals, competencies, systems, jobs, tasks, training requirements, courses, activities, costs, personnel and resources to generate concise, up to date and actionable reports. The reports provide insight on planned training activities for any time period; training requirements for each job/employee; budget, personnel and resource requirements, training impact as well as how to drive training effectiveness and efficiency by leveraging technology, improving resource allocation and identifying gaps, duplications and unwarranted training. [Forecast and Optimize Training Budgets, Personnel and Resources].

Module #5 Project Management

Implementation: To find out *“how training should be implemented”*. Provides a step by step approach for planning a project and tracking progress in real time. This includes the setup of phases and tasks, dependencies and constraints, timelines as well as the assignment of personnel and resources needed to complete. Moreover, ADVISOR tracks progress by comparing hours worked and money spent on each task to project plan, to anticipate delays, facilitate the implementation of corrective measures, and keep projects on-time and within budget. [Develop Project Plans and Track Progress].

Module #6 Performance Analysis

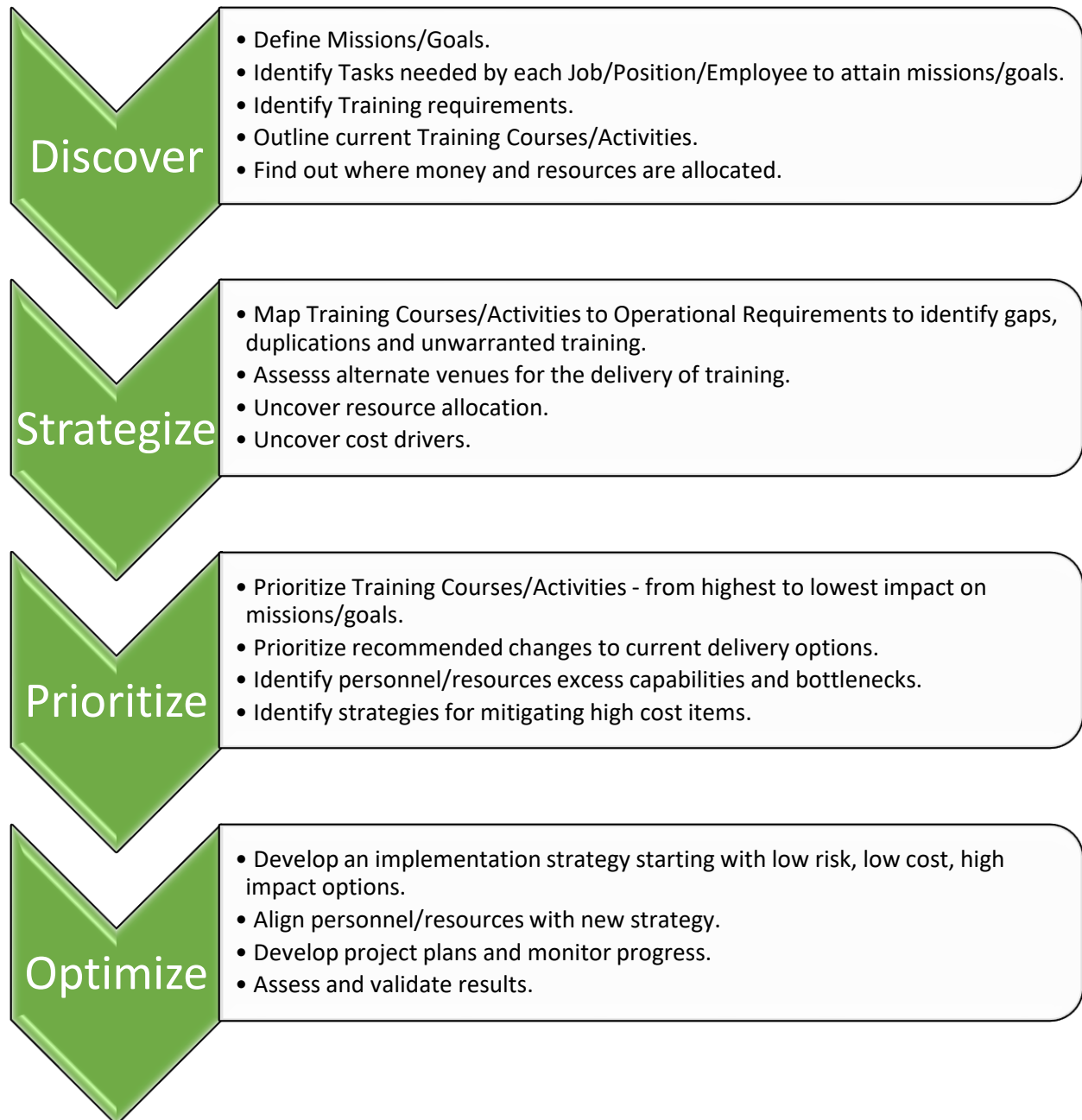
Evaluation: To find out *“how training impacts performance and organizational goals”*. Provides a step by step approach for improving performance by zeroing in on the source of the problem and identifying solutions that can produce the desired level of productivity. Moreover, ADVISOR highlights actions 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].



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:



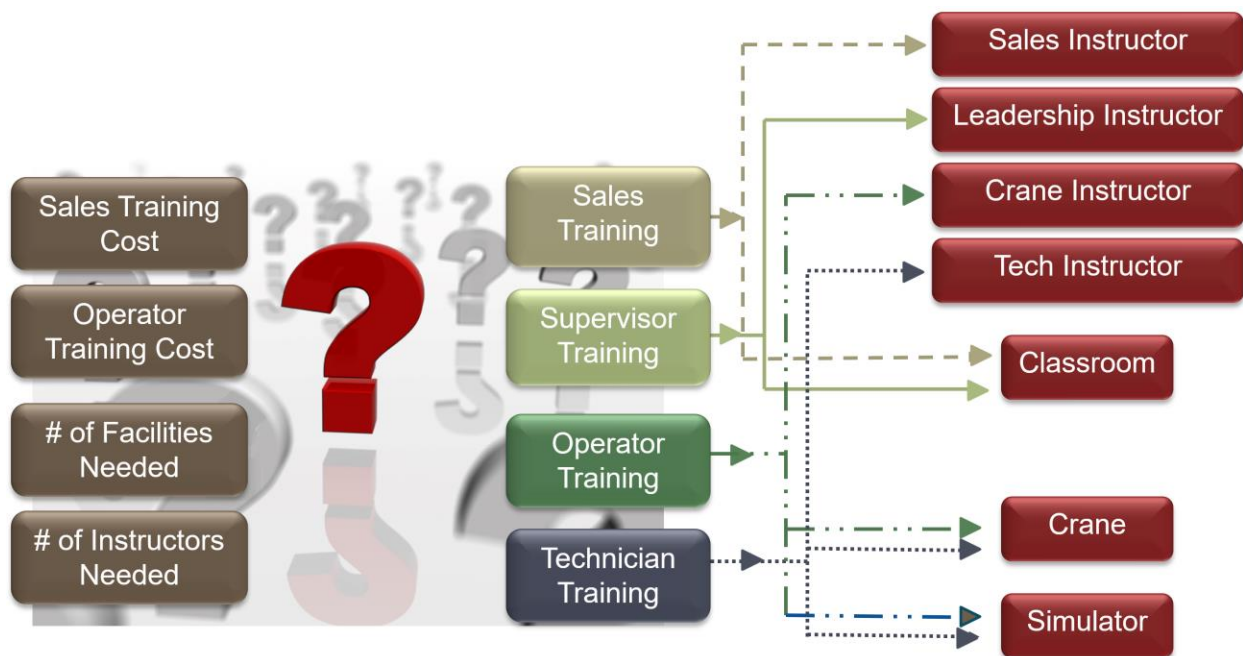
Module #4: Resource Management

ADVISOR Resource Management module 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.

With ADVISOR we can quickly and accurately forecast training costs, communicate results and manage requirements as project scope changes.

Jeff Reynolds

Manager, Global Sales & Technical Training
Intermec Technology Corporation



ADVISOR Features

Forecast Training Activities: Identify planned Courses/Activities in any location for selected time period.

Forecast Training Requirements: Identify Courses/Activities required by each Job, Position and Employee including Time to Competency.

Forecast Training Budget and Resources: Compute expenses, personnel and resource requirements for current or recommended delivery options for training activities with any time period.

Identify Training Gaps: Map Operational Requirements to Courses/Activities to identify training gaps.

Identify Duplications: Map Learning Objectives to Knowledge/Skill requirements to identify redundancies.

Identify Unwarranted Training: Map Courses/Activities to Operational Requirements to identify training with minimal or no value.

Identify Training Impacted by Change: Detect Jobs, Courses, Lessons and Objectives that could be impacted by change to a reference, policy or tool.

Evaluate Training Impact: Compute the Return on Investment (ROI) of Courses/Activities by comparing costs to impact on missions/goals.

ADVISOR Benefits

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

Facilitate Budget and Resource Management: Quickly forecast budget, personnel and resource requirements for one or multiple courses/activities for any given time period.

Uncover Cost Drives: Forecast budget, personnel and resource requirements over training programs life cycle to uncover cost drivers – i.e., where budget, personnel and resources are allocated.

Improve Performance: Map training courses/activities to operational requirements to identify training requirements that are not being addressed.

Minimize Training Duplication: Map training courses/activities to operational requirements to identify duplicate training activities.

Reveal Training Creep: Map training courses/activities to operational requirements to identify and highlight activities that are no longer relevant.

Preserve Training Integrity: Quickly identify Jobs, Tasks, Courses, Lessons and Objectives that could be impacted by change to guide, policy, etc.

Speed Report Generation: Compile data from all goals, systems, competencies, jobs, tasks, courses, costs, personnel and resources to generate concise, up to date and actionable reports with ease.

ADVISOR does the work that training consultants charge several thousands of dollars for.

Training with Multimedia

ADVISOR has been instrumental in illustrating with precise accuracy how our clients will save money, time and resources.

Joel Doherty
 Senior Marketing Consultant, Performx

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
- Bruce Castle – Lockheed Martin
- Bryan Chapman – Brandon-Hall.com
- Rick Cheek – Keesler AFB
- Dr. Ed Chenette – Chief of Naval Education and Training
- Dr. Adelaide Cherry – Maxwell AFB
- Alex Cohoon – US Navy, Virginia Beach FCTCLANT
- Beverly Condon – Goodfellow AFB
- Dr. Dennis Duke – US Navy Naval Air Systems Command
- Dr. Bruce Eddy – Lockheed Martin
- Russell Edmonds – UK MoD, Training and Simulation Systems Programme (TSSP)
- Frederick Glover – Naval Aviation Maintenance Training Group

- Dr. Robert Guptill – Dynamic Research Corporation
- Richard Grahlman – Naval Postgraduate School
- Dr. Jo Ann Graves – Expeditionary Warfare Training Group, Pacific
- Dr. Anthony Head – UK MoD, HQ Land Forces
- Janet Heins – Merck & Company
- Peter Hope – Canadian National Defence
- Betty Sue Jones – Maxwell AFB
- James Kalivoda – Naval Education and Training Professional
- David M Lorage – US Coast Guard
- Dr. Fred Madsen – Lockheed Martin
- Dr. Tim McLaughlin – Raytheon Professional Services
- Dr. Bill Melton, US Army – TRADOC
- Jesse Martinez – US Marine Corps
- Dr. Arlen Michaels – Nortel Networks
- Hector Moya – Goodfellow AFB
- Vangie Nix – Maxwell AFB
- Stephane Ouellet - CAE
- Arlene Parker – Keesler AFB
- Dr. Albert Pruett – Naval Aviation Maintenance Training Group
- Peter Sabiston – Canadian National Defence
- Mike Sazma – Great Lakes Naval Training Center
- Fred Roberts – Federal Deposit Insurance Corporation
- Roger St. Pierre – Canadian National Defence
- William Schafer – Trident Training Facility Bangor
- Dr. Bill Shook – Boeing Company
- Robert Simmon – Naval Technical Training Center
- John Stacy – Kraft Foods
- Karl Stradley – Raytheon Professional Services
- Gary Troy – Goodfellow AFB
- Dr. Steve Ulosevich – Southern Steel Company
- Chris Winters – Raytheon Systems Company
- Pete Willey – Pearson TQ
- Dr. Kenneth Woolman – Lockheed Martin

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 is in-turn having a significant impact on organizational performance and workplace learning. 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 senior executives and HRD professionals. The problem arises, however, in the way the results are measured at different organizational levels. From the 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 Training Management System that reconciles both views. In addition to simplifying and speeding Training Needs Analysis (TNA) and Training Systems Requirements Analysis (TSRA), ADVISOR Enterprise drives training efficiency by aligning current and future training activities to operational requirements to identify gaps, duplications and training with minimal value; uncovering cost drivers; forecasting and comparing the costs of viable delivery options; improving resource allocation; identifying/mitigating bottlenecks; producing training plans that leverage existing training programs/resources and generating audit trail to support recommendations.

Moreover, ADVISOR preserves training integrity, effectiveness, efficiency and relevance by quickly identifying training activities that could be impacted by a change to a mission, system, job, policy or publication; facilitates reusability and collaboration by storing all data in a centralized database that can be accessed anytime and from anywhere by all team members with only a browser; simplifies data collection from Subject Matter Experts through custom build Excel spreadsheets; speeds data analysis; simplifies data manipulation; tracks changes made by each team member; and generates dozens of reports in a single click. As a result, you are in a much better position to find out what worked and why, detect and correct problem areas, as well as capitalize on economies of scale. The reports are organized under the following five main categories:

- **Training Requirements.** Provides a quick snap shot of training activities planned this quarter, next quarter or next year; as well as the training requirements for each job/employee.
- **Maximize Training Impact.** Drives training effectiveness and efficiency by: (a) mapping current and future training courses/activities to operational requirements to identify gaps, duplications, and courses/activities that are no longer relevant; (b) forecasting and comparing the costs of viable delivery options; (c) identifying centers of excellence; and (d) preserving training integrity – i.e., identify courses, lessons, activities and objectives that could be impacted by a change to system, reference or policy.
- **Forecast Training Budget, Personnel & Resources.** Uncovers cost drivers and improves resource allocation. For example, identifies: how much money, personnel and resources are needed for each course and in total; what type of resources, personnel and skills are required, available or in short supply; the impact of changes to throughput, course length and delivery method on budget, personnel and resources; and so forth.

- **Manage Projects, Personnel & Resources.** Keeps projects on time and within budget, by optimizing the utility of personnel and resources.
- **Evaluate Costs & Impact.** Assesses the costs and impact of training activities. For example, compares actual to forecasted costs; and computes the Return on Investment (ROI) by comparing training costs to benefits (such as cost avoidance, gained productivity and/or revenue).

A brief description of key reports is presented in Chapter 3 through 7. For info on basic functionality and how to configure ADVISOR in line with needs, please refer to the ADVISOR Configuration User Guide. Remember that context sensitive help for each screen is also available by clicking on the **[Help]** button.

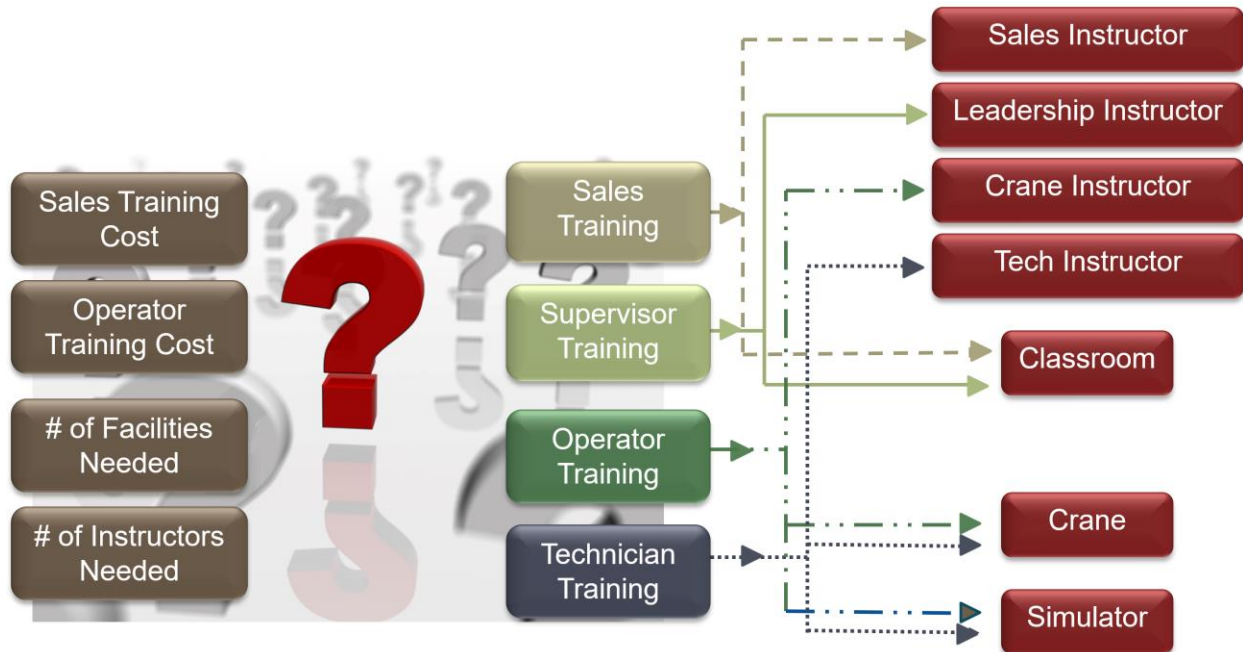
Notes:

- Access to reports, is limited through User privileges.
- All Users assigned to the same Client may use the same parameters to generate their own reports. However, only data from courses accessible to the user will be compiled and presented. Courses accessible to a user include: courses managed by the user, courses managed by subordinates of the user (i.e., individuals that report to User including their subordinates) as well as courses in sub-divisions that User has access to.
- ADVISOR is web based, can be installed on a local Server or used off BNH Server (cloud option), consists of 6 modules that can be used separately or in combination to meet various needs, and can be customized in line with requirements.

1.2 How Can ADVISOR Help You?

With multiple competing and continually changing priorities, maintaining efficiency is not a simple task. Resource utilization should be maximized, bottlenecks nullified, duplication minimized, activities prioritized, expenses scrutinized and centers of excellence recognized. Whether you are conducting manpower, personnel and training analyses, implementing new systems, subsystems or equipment, or managing training resources, to maximize training efficiency, quick and accurate answers to key questions are needed. For example, which training programs are planned this quarter, next quarter or next year; how much money, personnel and resources are needed for each course and in total; what type of resources, personnel and skills are required, available or in short supply; what impact will changes to throughput, course length and delivery method have on budget, personnel and resources; and so on.

With critical, up to date, concise and meaningful reports within easy reach, duplication 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.



More specifically, follows are ADVISOR “Resource Management” module features and benefits.

ADVISOR Features

Forecast Training Activities: Identify planned Courses/Activities in any location for selected time period.

Forecast Training Requirements: Identify Courses/Activities required by each Job, Position and Employee including Time to Competency.

Forecast Training Budget and Resources: Compute expenses, personnel and resource requirements for current or recommended delivery options for training activities with any time period.

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Reveal Training Creep: Map training courses/activities to operational requirements to identify and highlight activities that are no longer relevant.

Preserve Training Integrity: Quickly identify Jobs, Tasks, Courses, Lessons and Objectives that could be impacted by change to guide, policy, etc.

Speed Report Generation: Compile data from all goals, systems, competencies, jobs, tasks, courses, costs, personnel and resources to generate concise, up to date and actionable reports with ease.

ADVISOR does the work that training consultants charge several thousands of dollars for.

Training with Multimedia

ADVISOR has been instrumental in illustrating with precise accuracy how our clients will save money, time and resources.

Joel Doherty

Senior Marketing Consultant, Performx

1.3 System Requirements

Database/Server Minimum Requirements

- 2 CPU Processor with 4GB of RAM
- 5 GB of free Hard Disk Space
- Windows 2000, 2003, 2008, 2012, 7, 8, 10, NT, or Sun Solaris 9.0 or higher, or Linux Red Hat 6.0 or higher
- Web Server that supports Java Virtual Machine and can run Java Servlet. Supported products include: Tomcat 4.0 or higher, IBM WebSphere 4.0 or higher, Resin, Oracle Application Server, Jserv and others...
- Oracle version 9i, 10g, 11g or 12c

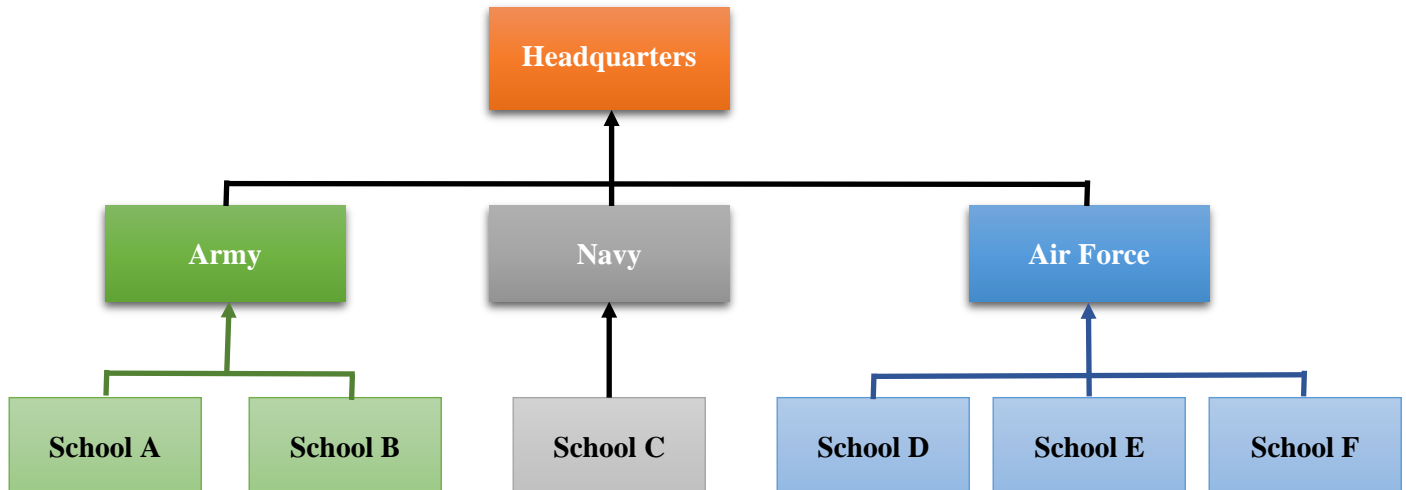
Workstation/Desktop Minimum Requirements

- Pentium IV with 512 MB RAM
- 200 MB of free Hard Disk Space
- Windows 98, ME, XP, VISTA, 7, 8, 10, NT, 2000, 2003, 2008 or Sun Solaris 8.0 or higher
- Internet Explorer 6.0 or higher, Mozilla Firefox 3.0 or higher, Google Chrome, or Safari

1.4 Impact of Clients and Users Setup on Data Access & Reports

Clients Setup

ADVISOR can easily mirror the hierarchy of Client's organization. In other words, in addition to setting up multiple Clients, each Client can be further subdivided into Divisions, as needed. Moreover, since Users can be assigned to specific Clients or Divisions, data that Users can access can be easily controlled as well.



Implications of Clients Setup on Data Access:

- Users assigned to a Client can automatically compile, compare and view the results of all analysis within all Divisions under this Client using the **Reports** tab. It does not grant them direct access to Job or Course Analysis within these Divisions. In other words, they cannot modify the analysis; they can only view the results. For example:
 - ☐ Chief Learning Officer (CLO), VP or Commander assigned to Headquarters (HQ) can compile and generate reports from all courses within all Divisions (Army, Navy and Air Force) as well as Sub Divisions (Schools A, B, C, D, E & F).
 - ☐ Director or Commander assigned to Army Division can only compile and generate reports from Army Division as well as well as Sub Divisions (Schools A and B).
 - ☐ Manager or Commander assigned to School A can only compile and generate reports from courses within School A.

Users Setup

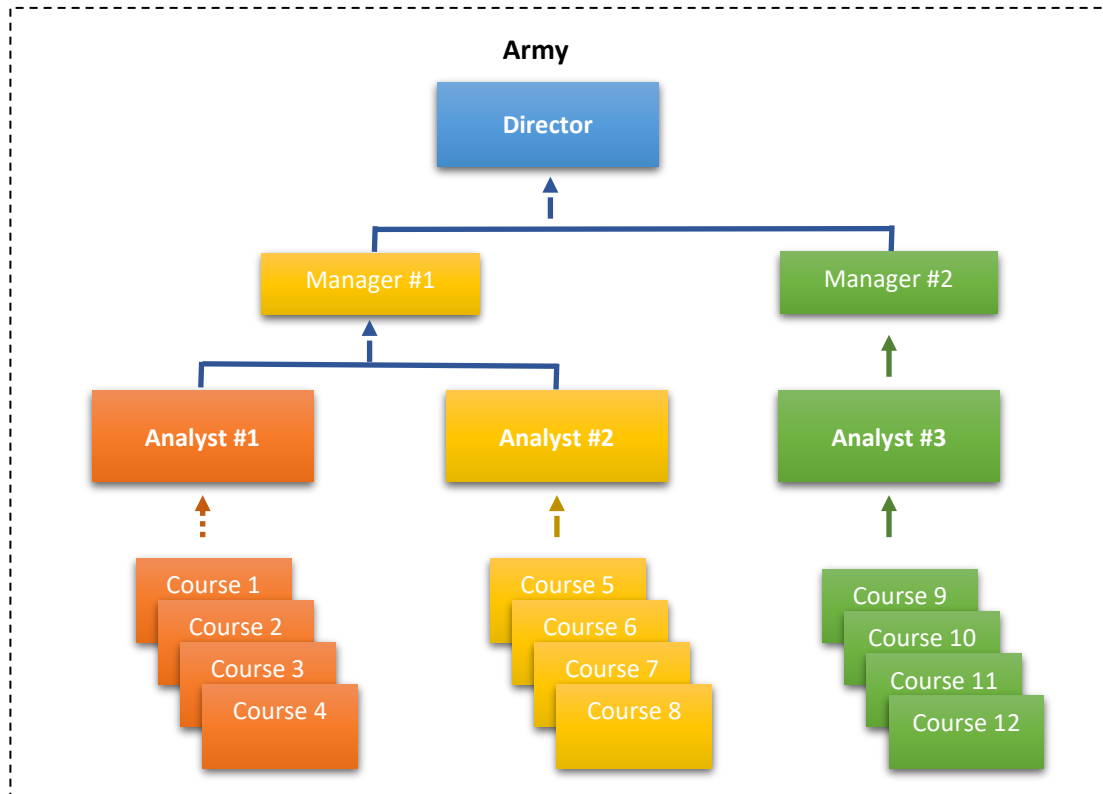
To preserve quality and further simplify the use of ADVISOR Enterprise, privileges can be assigned to each individual in line with their role, requirements and responsibilities. For example, Job Task Analysis and Media Analysis can be assigned to Instructional Designers; Personnel/Resource Cost Templates Creation/Management to Financial Analysts; Reports Generation to Training Managers; Dashboards to Executives, and so forth. Moreover, all privileges are limited to Clients that Users have been assigned to. For example, Analysts assigned to School A can only analyze jobs and courses under School A, but not School B or C.

Users can also collaborate with colleagues – i.e., provide access to their Project Analysis, Job Task Analysis, Course Analysis, Solution Analysis, Templates, and so forth for review, comments and edits - by clicking on the **Sharing** tab, placing checkmarks next to their names and clicking **Save**. By default, the analysis is automatically shared with User's direct supervisor(s) - i.e., individual(s) that User **Reports To**.



Implications of **Report To** on Data Access:

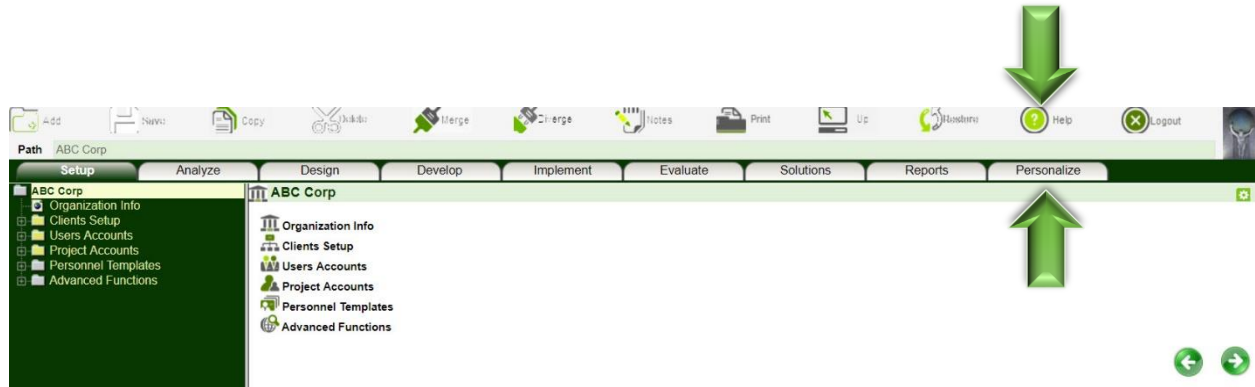
Managers up the chain can compile, compare and view the results of analysis from all subordinates using the **Reports** tab. This does not imply that they have direct access to Job or Course Analysis. In other words, they cannot modify the analysis; they can only view the results. For example, based on hierarchy below:

- ☐ Analyst 1 can view and generate reports on their courses 1 through 4.
- ☐ Manager 1 can view and generate reports on courses 1 through 8 that belong to Analysts 1 & 2 that **Report To** Manager 1.
- ☐ Director cannot view any course, but can generate reports on courses 1 through 12 that belong to Analysts 1, 2 and 3 that **Report To** Managers 1 and 2; who in-turn **Report To** the Director.



1.5 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 clicking on the  **Preferences** node under the [**Personalize**] tab, editing the required items and clicking [**Save**] button. For example, you may hide or display the Popup 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 the [**Help**] button.

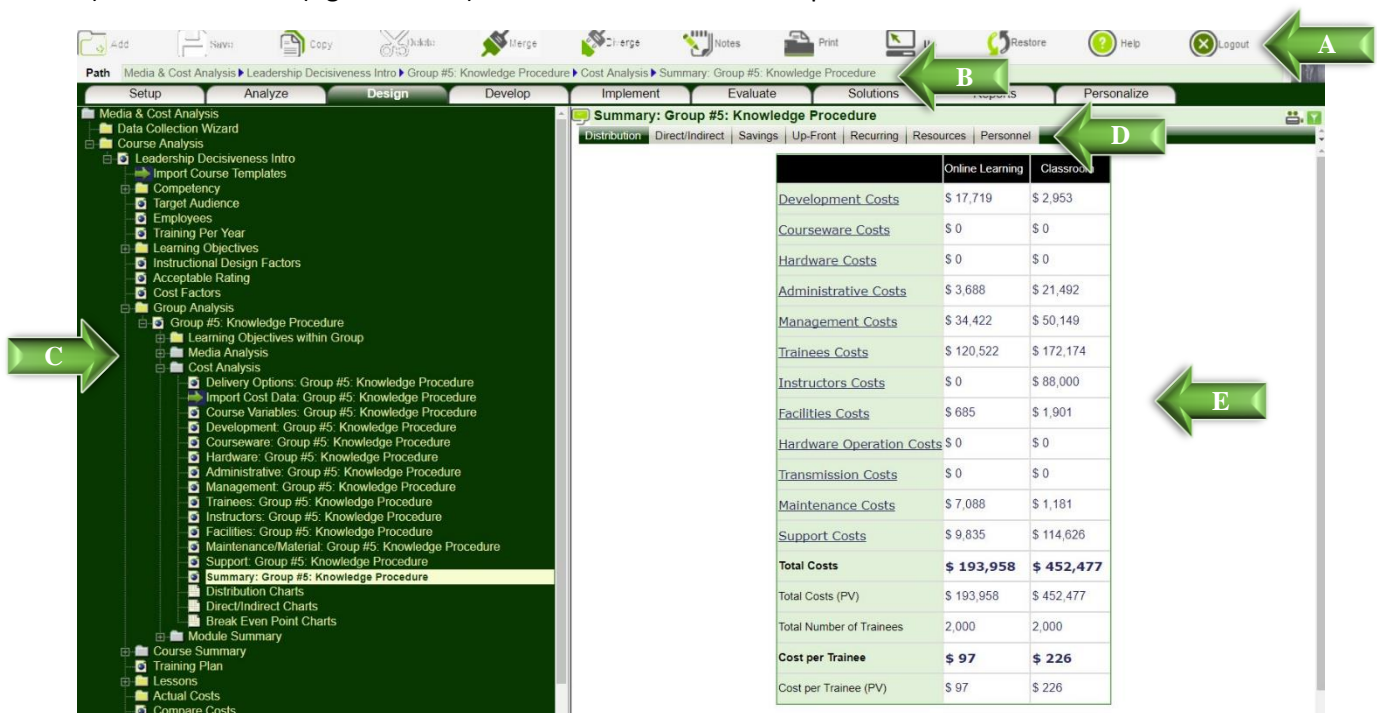


To make the most out of ADVISOR Enterprise, Chapters 2 through 7 should be thoroughly reviewed to gain clear understanding of the system’s capabilities and how to configure ADVISOR to best meet your needs.

1.6 How is ADVISOR Organized?

ADVISOR has five main components organized within 3 windows (top, left and right – the sizes of the windows can be adjusted by dragging the border). Once you become familiar with these components, the system operation and navigation will become fairly simple.

- Buttons (top window)** – Actions available to user are presented as a series of buttons at the top of the screen. You can Add, Save, Copy, Delete, Merge, Diverge, add comments/assumptions to a screen (Notes), Print a screen, Return to previous level (Up), Restore previous values, request Help or Logout. Information is only saved when you click the **[Save]** button.
- Path (top window)** – Tracks your progress as you navigate through ADVISOR.
- Tree (left window)** – Lists options (nodes) available to user. To expand an option (node), click on the **[+]** sign. To view the contents of an option (node), click on corresponding node.
- Tabs (top of right window)** – Data for some nodes are divided into several tabs. Click on tab to view its contents.
- Main Window (right window)** – Content of each screen is presented in this window.



The screenshot shows the ADVISOR software interface. Callout A points to the top toolbar with buttons like Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Restore, Help, and Logout. Callout B points to the Path bar showing the current navigation path: Media & Cost Analysis > Leadership Decisiveness Intro > Group #5: Knowledge Procedure > Cost Analysis > Summary: Group #5: Knowledge Procedure. Callout C points to the Tree view on the left, which lists various nodes under 'Media & Cost Analysis', including 'Group #5: Knowledge Procedure' which is currently selected. Callout D points to the tabs at the top of the right window, with 'Summary' being the active tab. Callout E points to the main data table in the right window, which displays cost breakdowns for 'Online Learning' and 'Classroom' environments.

	Online Learning	Classroom
Development Costs	\$ 17,719	\$ 2,953
Courseware Costs	\$ 0	\$ 0
Hardware Costs	\$ 0	\$ 0
Administrative Costs	\$ 3,688	\$ 21,492
Management Costs	\$ 34,422	\$ 50,149
Trainees Costs	\$ 120,522	\$ 172,174
Instructors Costs	\$ 0	\$ 88,000
Facilities Costs	\$ 685	\$ 1,901
Hardware Operation Costs	\$ 0	\$ 0
Transmission Costs	\$ 0	\$ 0
Maintenance Costs	\$ 7,088	\$ 1,181
Support Costs	\$ 9,835	\$ 114,626
Total Costs	\$ 193,958	\$ 452,477
Total Costs (PV)	\$ 193,958	\$ 452,477
Total Number of Trainees	2,000	2,000
Cost per Trainee	\$ 97	\$ 226
Cost per Trainee (PV)	\$ 97	\$ 226

1.7 Basic ADVISOR Functions

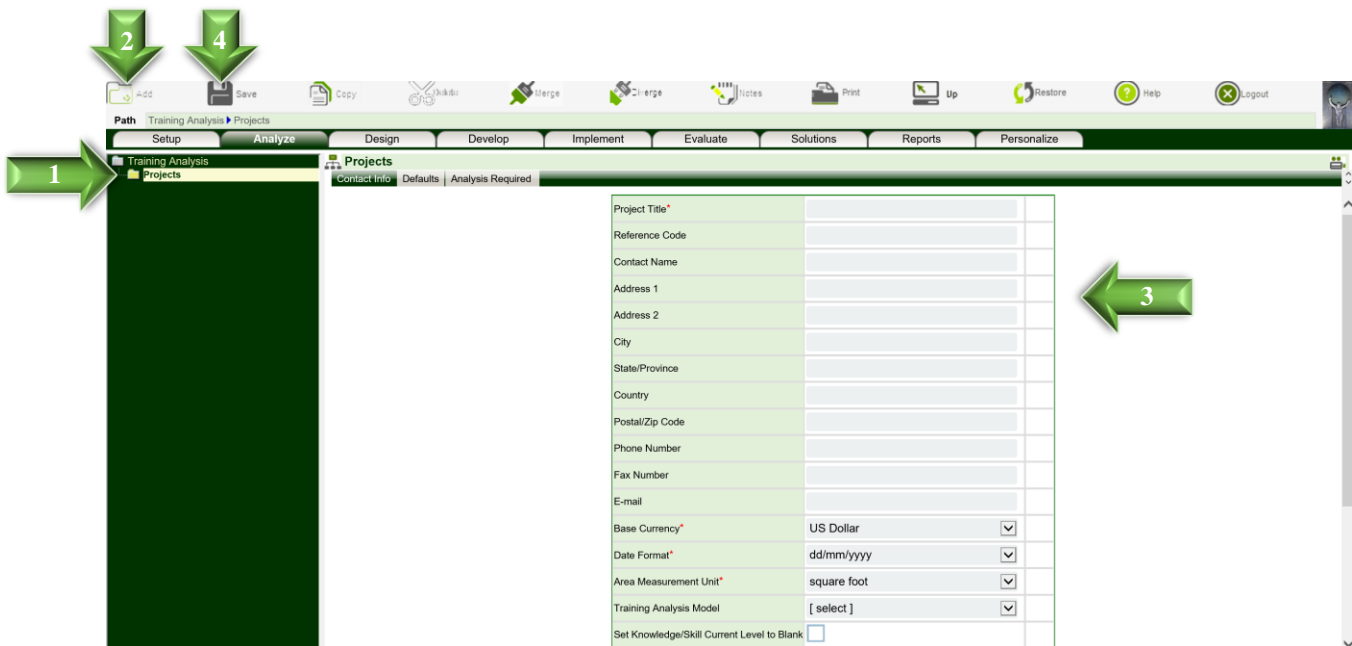
Add: To add a Project, Mission, Job, Task, Objective, Course or any other element:

Step 1: Click on corresponding folder (Projects, for example).

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

Step 3: Input the desired info.

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



The screenshot shows the ADVISOR software interface. The top toolbar contains buttons for Add, Save, Copy, Paste, Merge, Change, Notes, Print, Up, Restore, Help, and Logout. The left sidebar shows a tree view with 'Training Analysis' and 'Projects'. The 'Projects' folder is selected, and a green arrow labeled '1' points to it. The main area displays a form for adding a new project. The form has tabs for 'Contact Info', 'Defaults', and 'Analysis Required'. The 'Contact Info' tab is active, showing fields for Project Title, Reference Code, Contact Name, Address 1, Address 2, City, State/Province, Country, Postal/Zip Code, Phone Number, Fax Number, E-mail, Base Currency (US Dollar), Date Format (dd/mm/yyyy), Area Measurement Unit (square foot), Training Analysis Model ([select]), and Set Knowledge/Skill Current Level to Blank. A green arrow labeled '3' points to the form fields. A green arrow labeled '2' points to the 'Add' button in the top toolbar. A green arrow labeled '4' points to the 'Save' button in the top toolbar.

Edit: To edit a Project, Mission, Job, Task, Objective, Course or any other element:

Step 1: Click on corresponding element (Project A, for example).

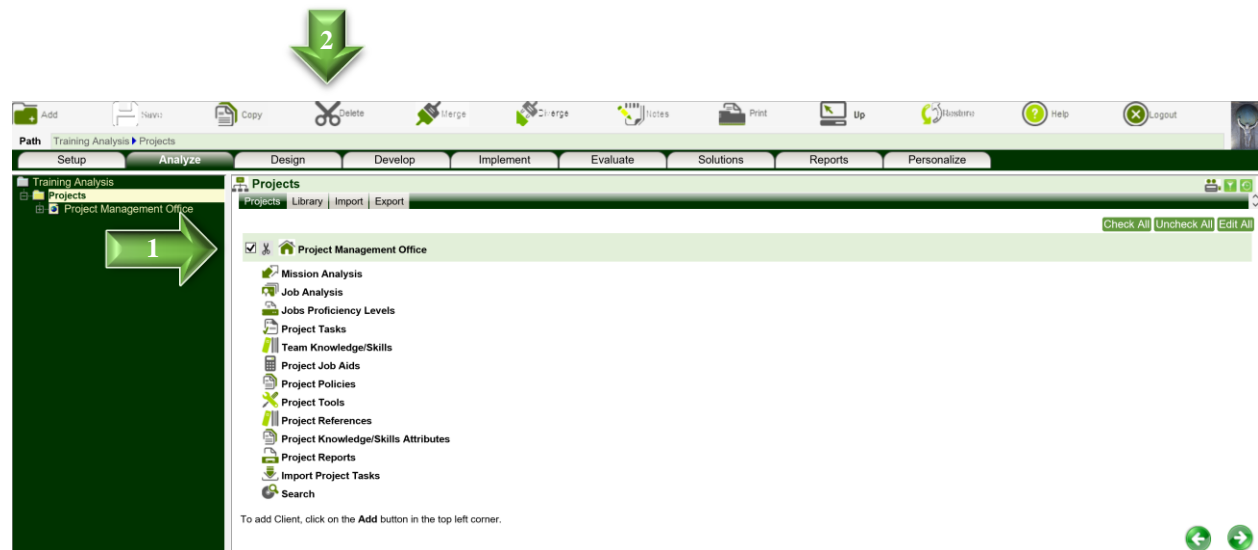
Step 2: Modify the desired info.


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

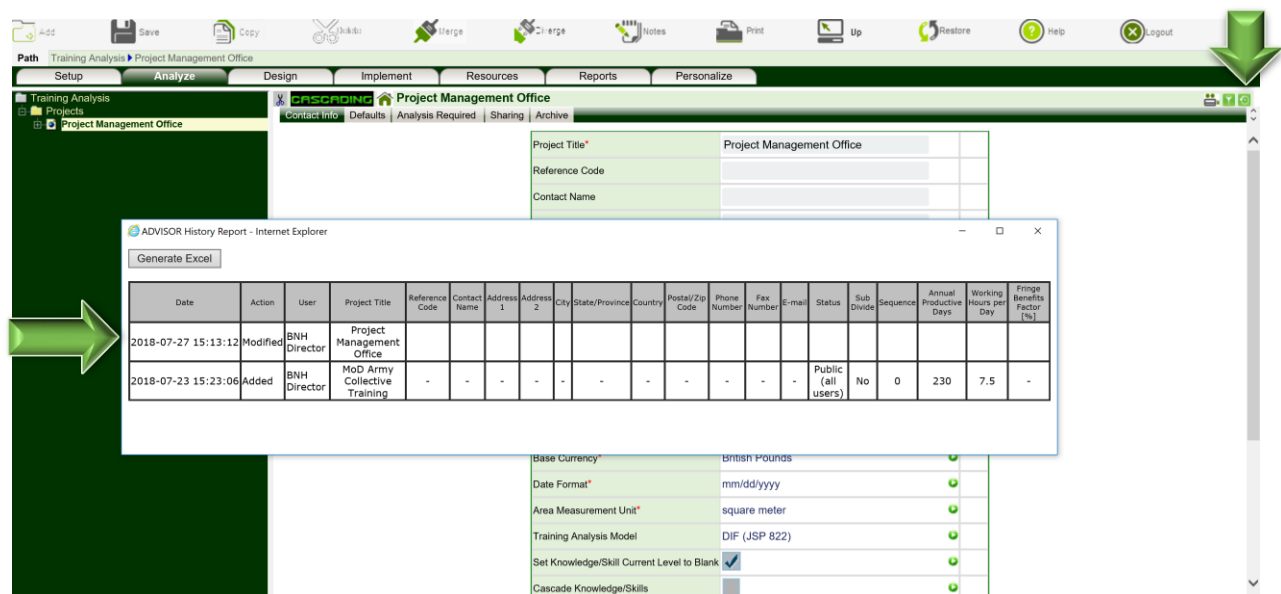
Delete: To delete a Project, Mission, Job, Task, Objective, Course or any other element:

Step 1: Place checkmarks next to the desired records (Project Management Office, for example).

Step 2: Click the [Delete] button.



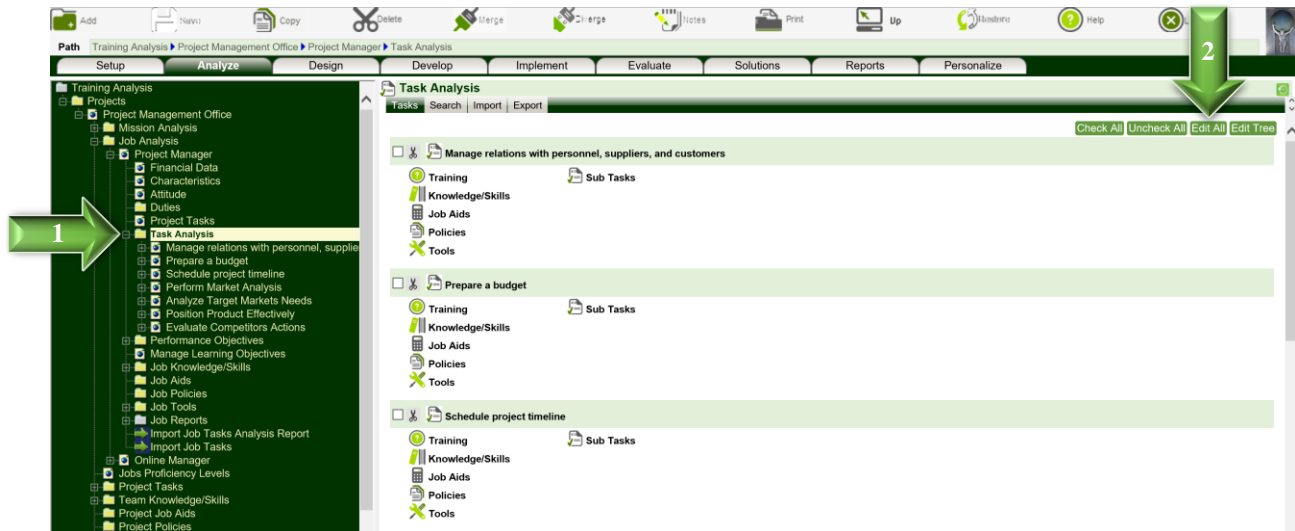
Track Changes: To find out when an element was created, modified or deleted and by whom, click on the View History  icon to display relevant data.



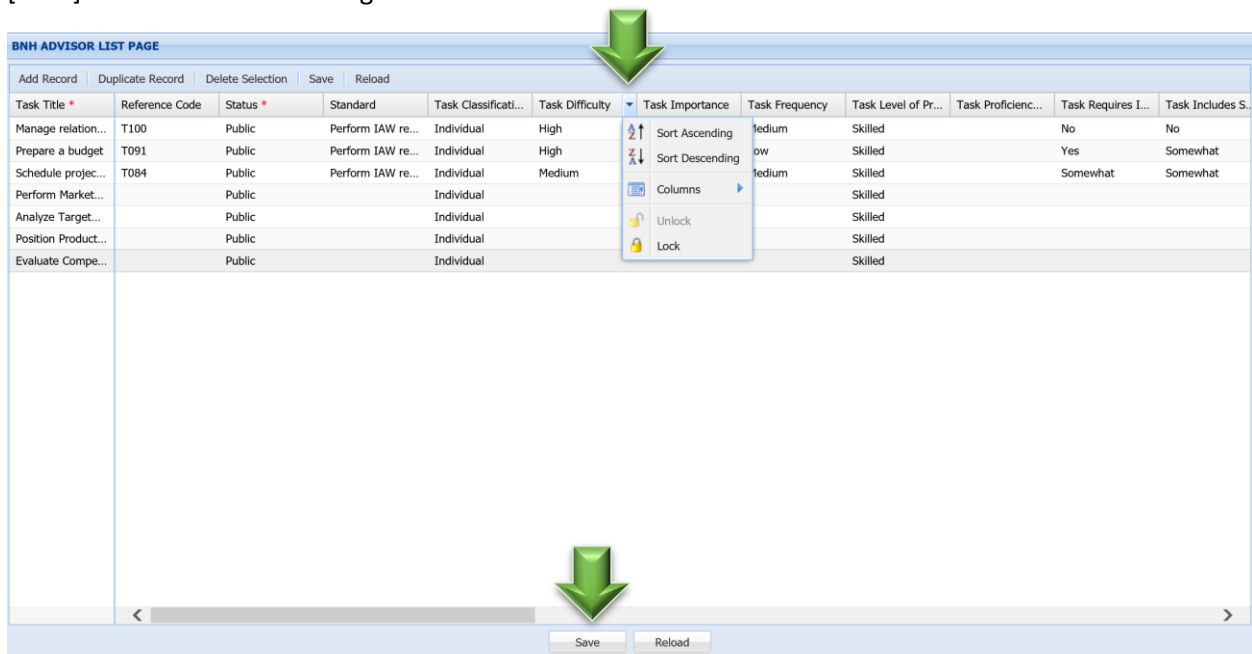
Edit Multiple Records: To edit multiple Projects, Missions, Jobs, Tasks, Objectives, Courses or any other elements:

Step 1: Click on the corresponding folder.

Step 2: Click the [Edit All] tab.



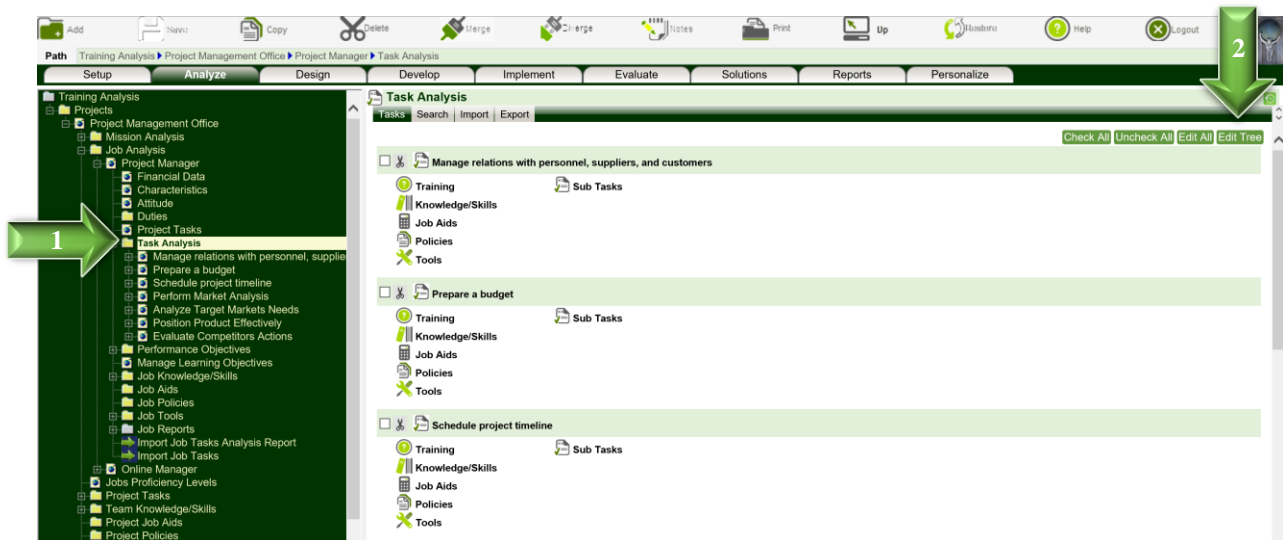
The Projects, Missions, Jobs, Tasks, Objectives, Courses, and so forth are presented in an Excel like tabular format. You may sort the data on any column (Title, for example), or lock (prevent the column from scrolling), by clicking on the arrow to the right of the column title, and selecting desired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



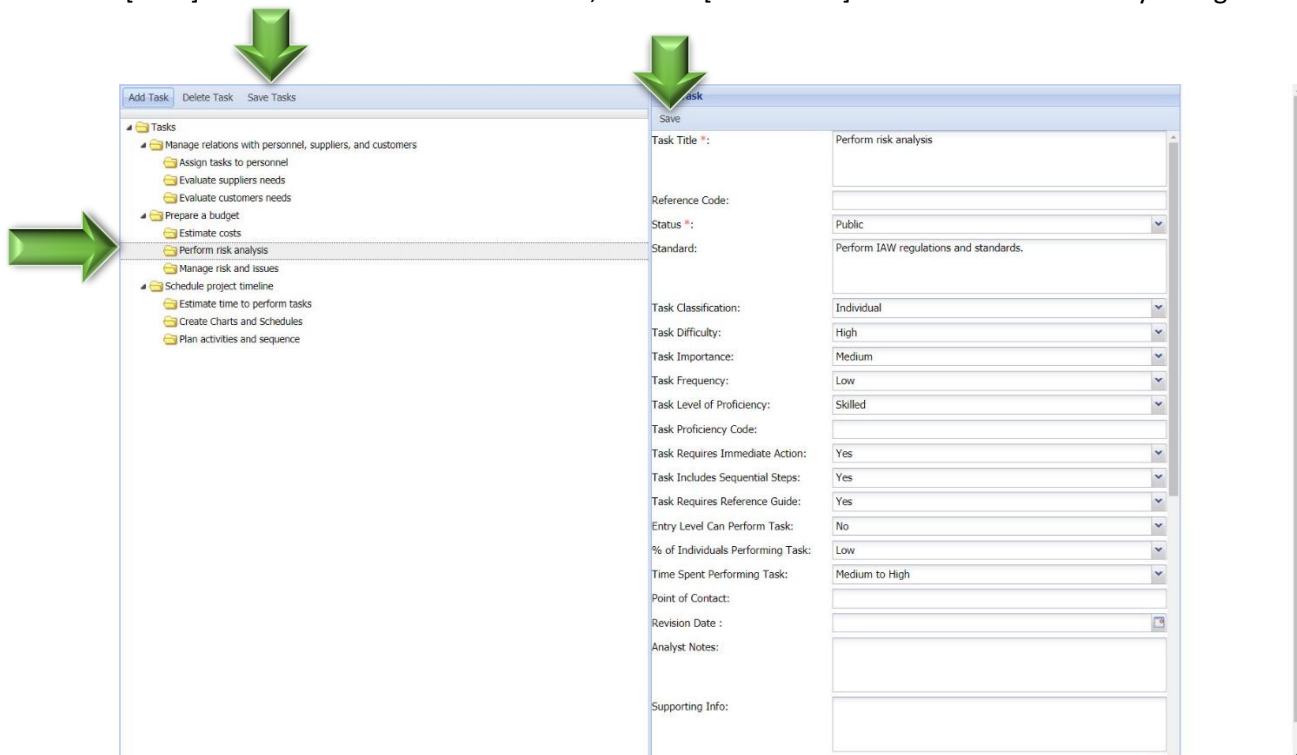
Modify Hierarchy: To change the hierarchy or the order of Tasks or Objectives:

Step 1: Click on the corresponding folder.

Step 2: Click the **Edit Tree** tab.



Tasks or Objectives are presented in a tree like 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, “Perform risk analysis” 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 the Edit option. Once record is edited, click on **[Save]** button above the record to save; and the **[Save Tasks]** button to save hierarchy changes.

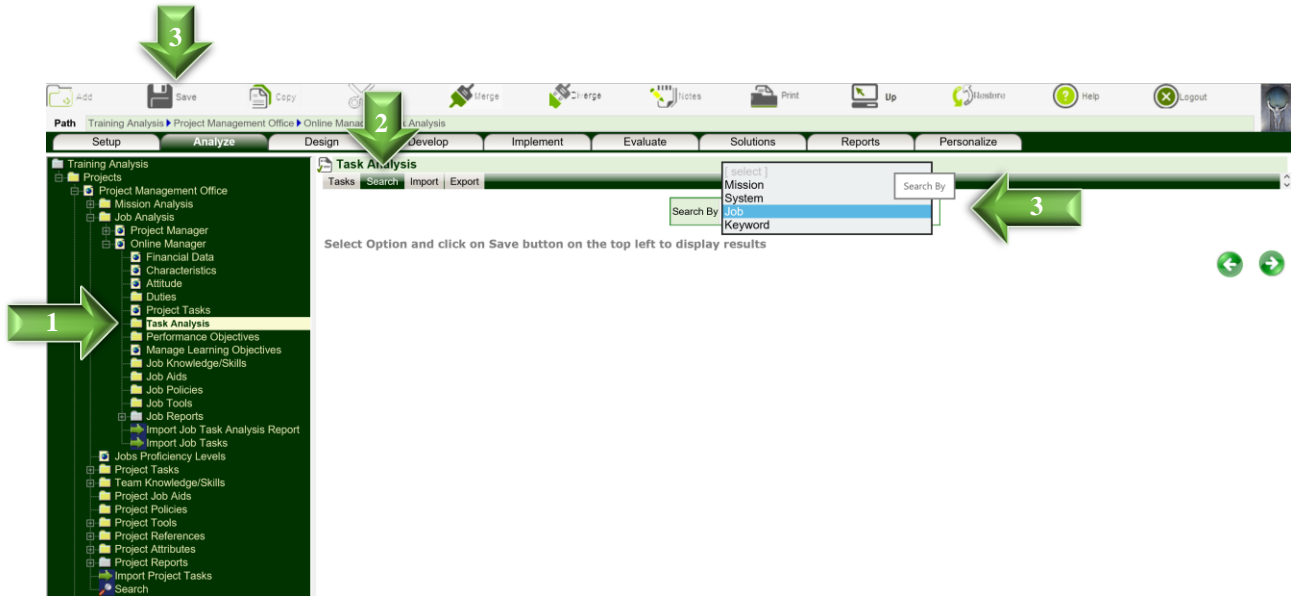


Search and Copy: You can search and copy Jobs, Tasks and Performance Objectives as follows:

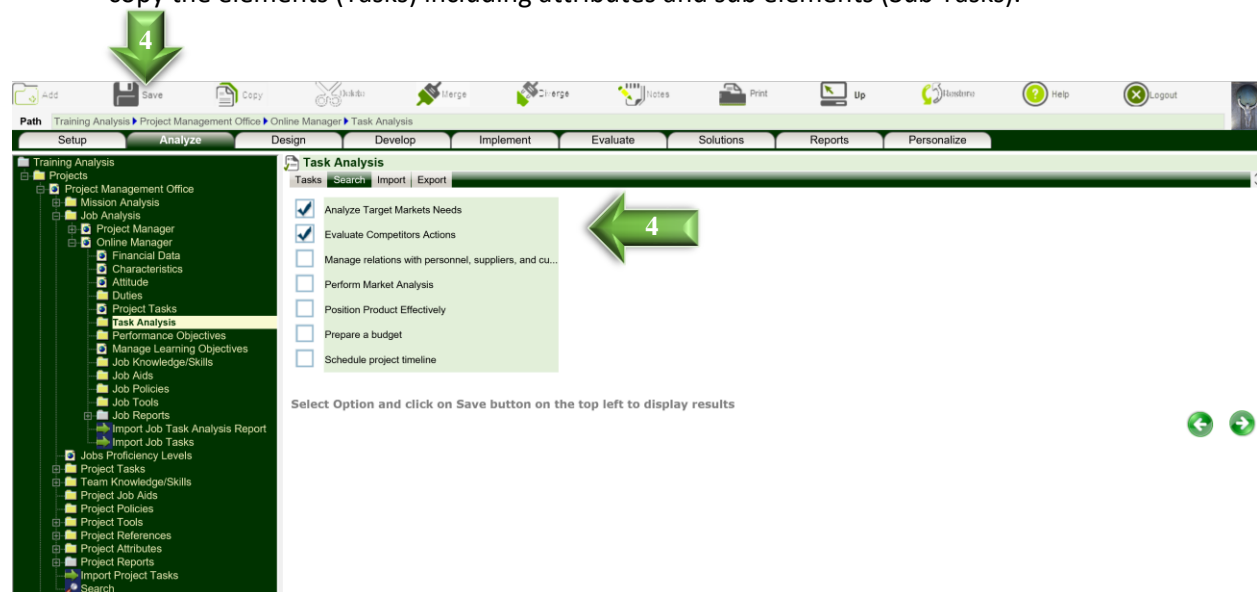
Step 1: Click on the desired folder – Job Analysis, Tasks Analysis or Performance Objectives.

Step 2: Click on the [Search] tab.

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



Step 4: Place checkmarks next to the desired elements (Tasks, for example) and click the [Save] button to copy the elements (Tasks) including attributes and sub elements (Sub Tasks).



Import Data: Dozens of Excel Spreadsheets are provided (<http://www.bnhexpertsoft.com/data-collection-forms/>) 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.

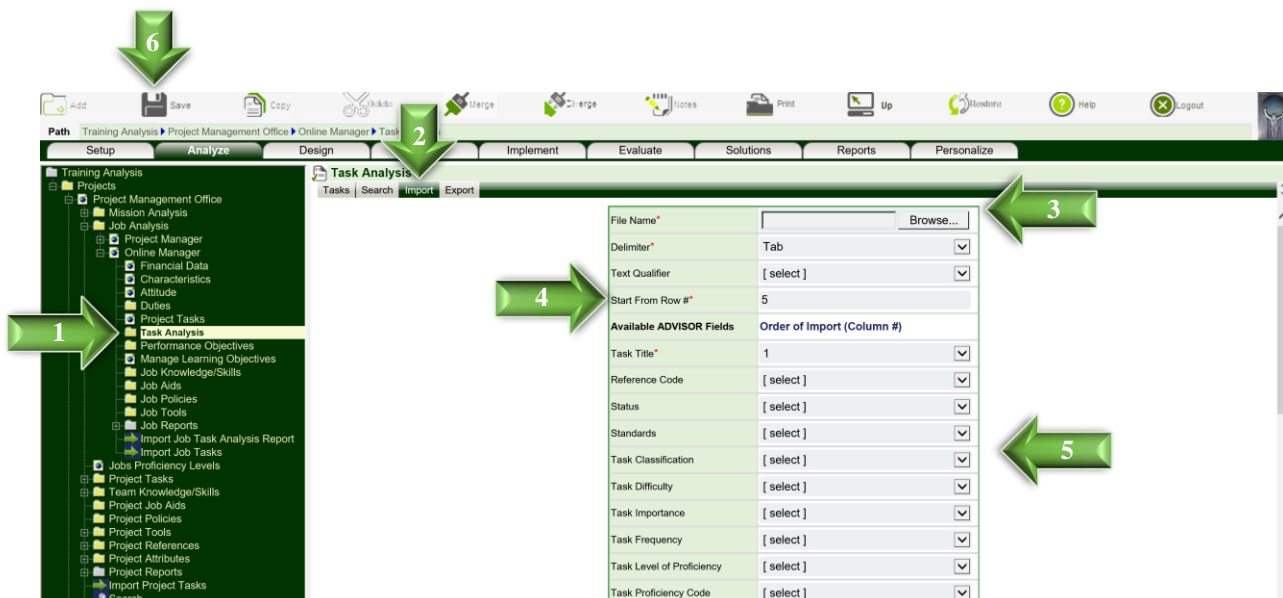
Step 2: Click on the [Import] tab.

Step 3: Click [Browse] and select the desired spreadsheet.

Step 4: Indicate which row to start importing data from, 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 the 5th row.

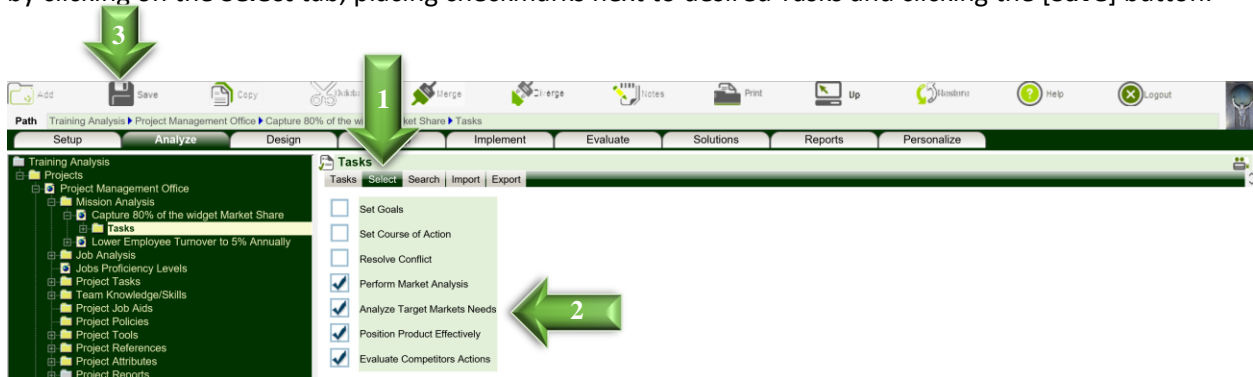
Step 5: Indicate where the data for each field resides within the Excel spreadsheet. For example, if Task Title is stored in column 1, then input 1; and so forth. Data in Excel spreadsheets is sequentially mapped to corresponding fields in ADVISOR. You are not required to import all attributes. For example, 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.

Step 6: Click on the [Save] button to import.



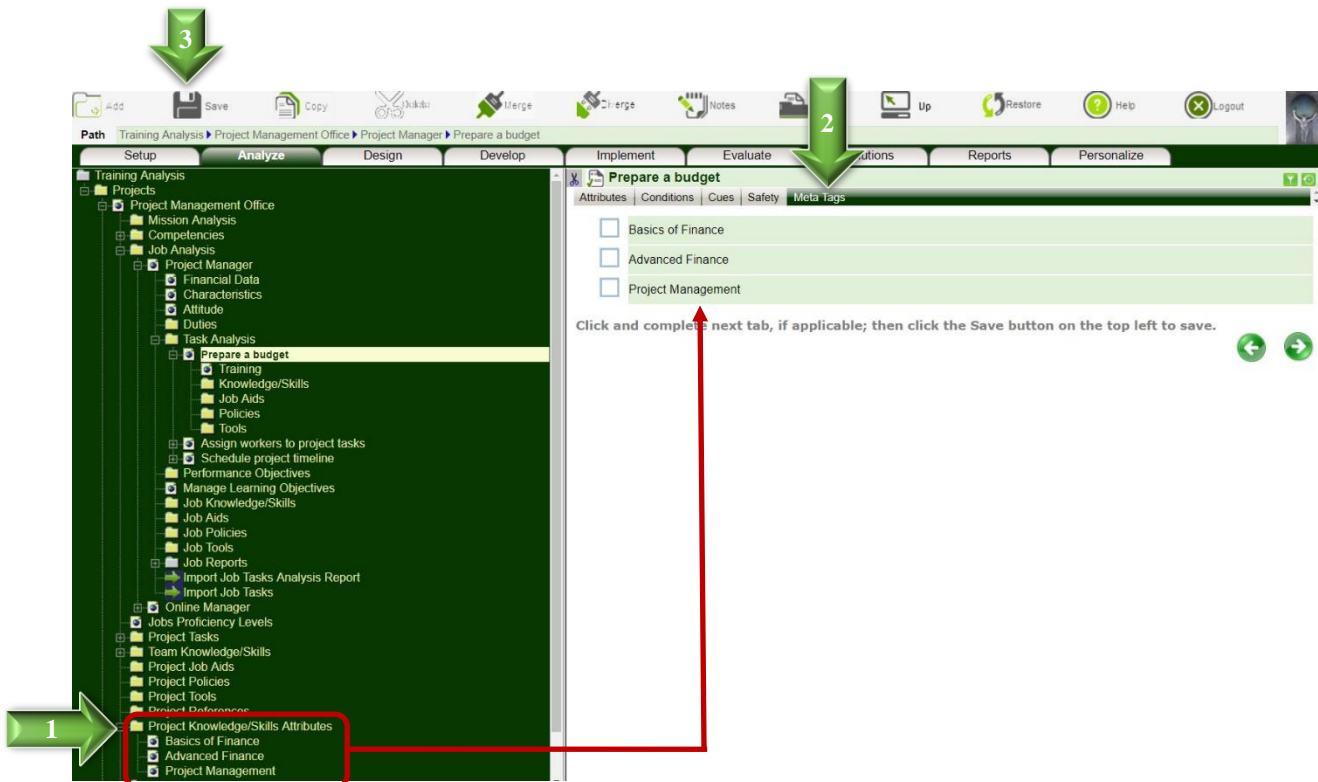
Note: **Reference Code** is also used for detecting duplicate records. For example, if Job Task is imported, ADVISOR will 1st verify whether the Job already has a Task with the same Reference Code. If it does, the following message will appear “Duplicate Records already exist. Overwrite attributes?” If Ok is selected, the attributes of the Job Task in ADVISOR will be updated. If Cancel is selected, the import will be aborted.

Setup and Assign Meta Tags: To minimize duplication each time a Mission, System or Project Task is added, it is stored in a centralized repository. The Tasks can, in-turn, be assigned to any Mission or System by clicking on the **Select** tab, placing checkmarks next to desired Tasks and clicking the **[Save]** button.

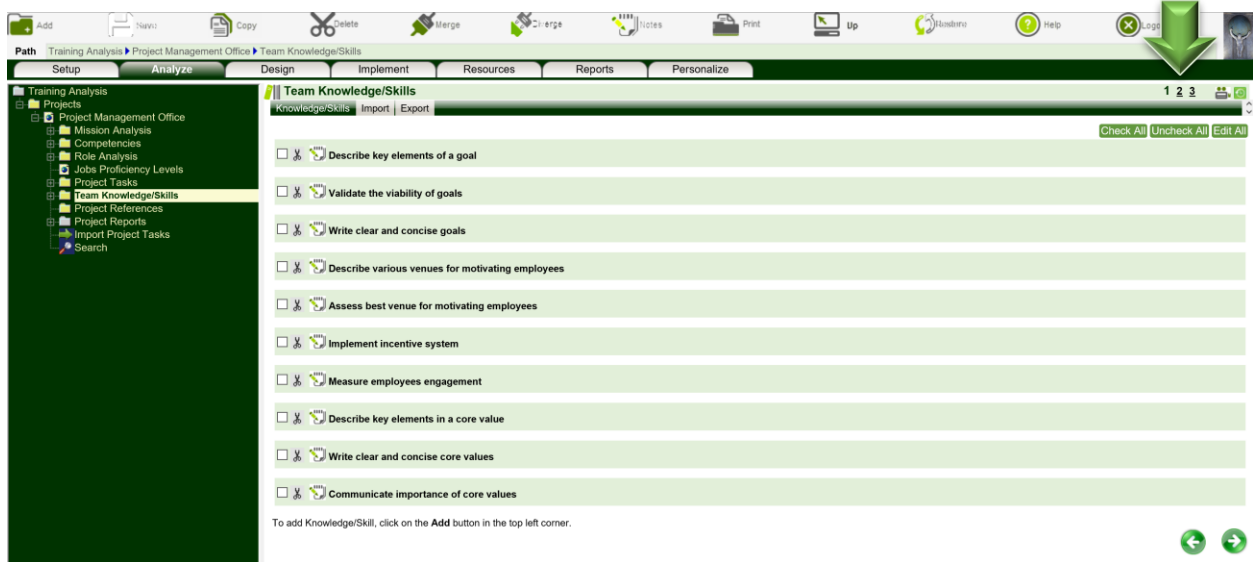


Similarly, Knowledge, Skills and Attitudes (KSAs) are stored in a centralized repository and can be assigned to any Task or Objective.

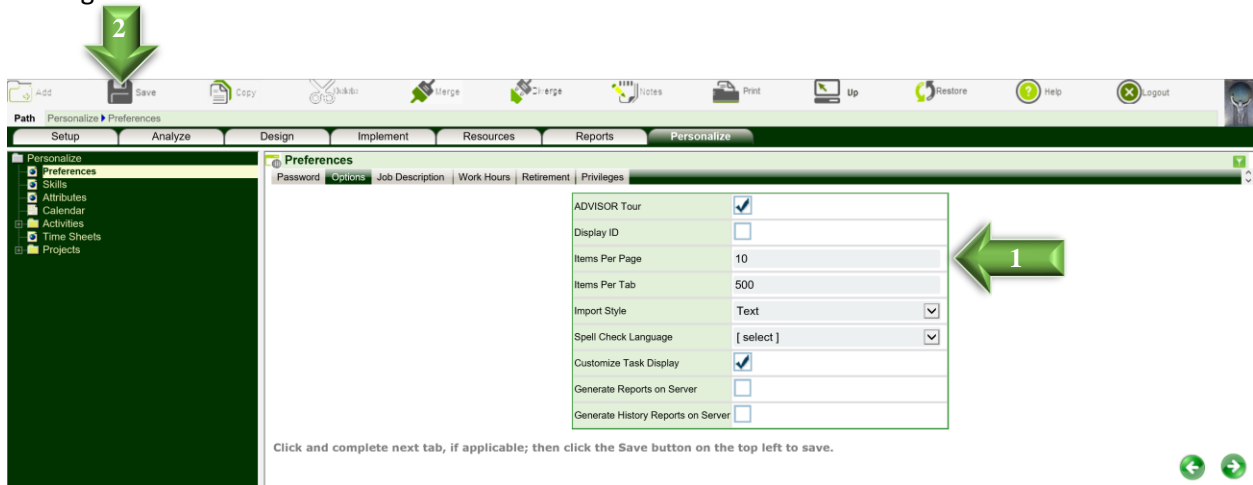
To quickly zero in on desired Tasks or KSAs within a repository, Meta Tags can be created under the Project Knowledge/Skills Attribute folder and assigned to any Task or KSA by clicking on **Meta Tag** tab, selecting the desired Meta Tags and clicking **Save**.



Specify Items per Page: By default, 10 items (such as Projects, Tasks, Objectives, Knowledge/Skills, and so forth) are displayed on each page. Once the number of items exceeds 10, the remaining items are displayed on subsequent pages. The number of pages available for each item is indicated on the top right as shown below. To display the items within each page, click on the corresponding page number.



You can modify the number of items to be displayed on each page under **Options** tab for the **Preferences** node under the **Personalize** tab by specifying the number of items to be displayed on each page and clicking the **Save** button.



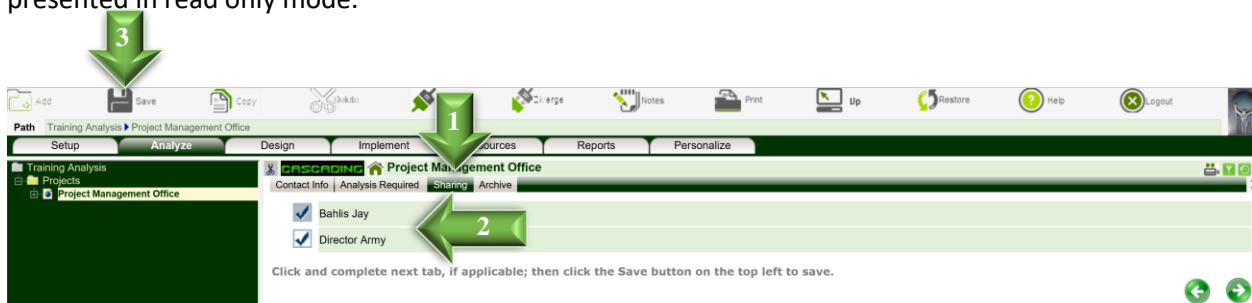
Limit Access to Data/Analysis: By default, when a new Project, Job, Task, and so forth is created, its **Status** is set to **Public** to permit other Users to find, copy and reuse the Project, Job or Task using the Search function and in-turn minimize the effort needed to conduct the analysis. This does not imply that other Users can review and edit your Project, Job or Task. It simply implies that they can reuse. To maintain anonymity, you can set the Project, Job or Task Status to **Private**, and in-turn exclude them from the Search function.



Project Title*	Project Management Office	
Reference Code		
Contact Name		
Phone Number		
E-mail		
Base Currency*	US Dollar	✓
Date Format*	mm/dd/yyyy	✓
Area Measurement Unit*	square foot	✓
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	<input type="checkbox"/>	✓
Client*	FedEx (Flight Training)	✓
Status*	Public (users for client)	✓
Manager*	Director BNH	✓
Sub Divide*	No	✓

Click and complete next tab, if applicable; then click the Save button on the top left to save.

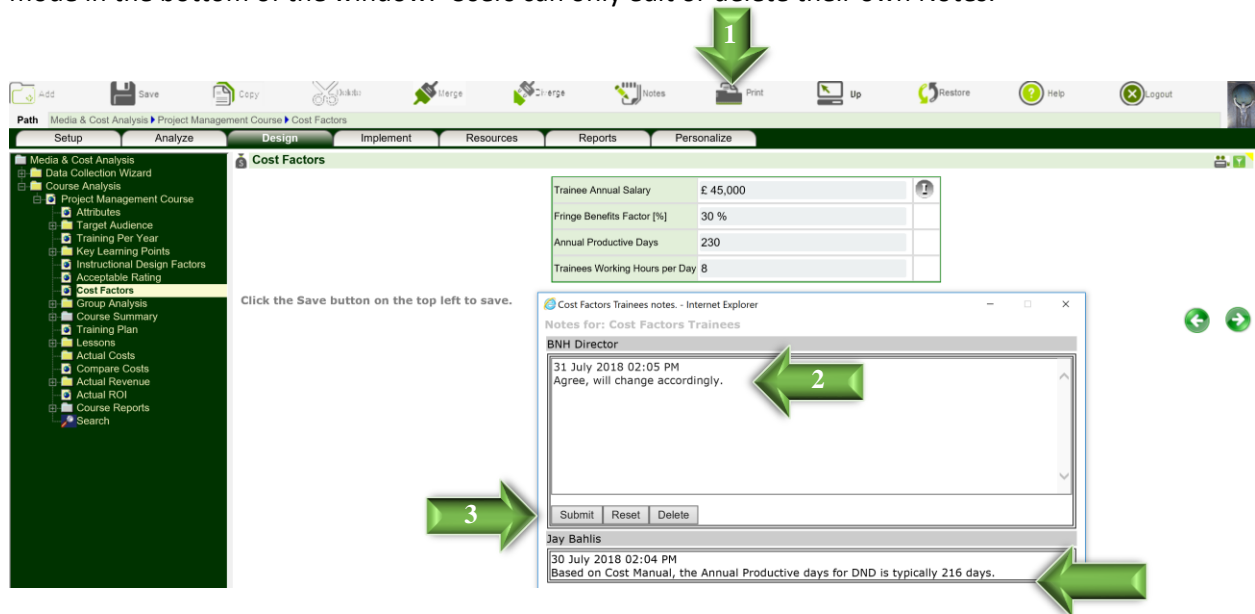
Collaborate with Team: Each analysis including Project, Course and so forth is assigned to a specific User (Manager) – typically the individual that created the Project or Course. By default, only the Manager can view the Project or Course and make changes. To allow other Users to review and make changes, the Project or Course can be shared with them by clicking on the **Sharing** tab, placing checkmarks next their name and clicking **Save**. If the Project or Course Manager reports to another User, the Project or Course will be automatically shared with them. In this case, the checkmark next to the Supervisor name is presented in read only mode.



<input checked="" type="checkbox"/>	Bahis Jay
<input checked="" type="checkbox"/>	Director Army

Click and complete next tab, if applicable; then click the Save button on the top left to save.

Add Notes: Users may add a Note to any screen by clicking on the **Notes** button, typing the note in the new window and clicking the **Submit** button to save. Notes from other Users are presented in read only mode in the bottom of the window. Users can only edit or delete their own Notes.



1

2

3

Click the Save button on the top left to save.

Trainee Annual Salary	£ 45,000
Fringe Benefits Factor [%]	30 %
Annual Productive Days	230
Trainees Working Hours per Day	8

Cost Factors Trainees notes. - Internet Explorer

Notes for: Cost Factors Trainees

BNH Director

31 July 2018 02:05 PM
Agree, will change accordingly.



Submit Reset Delete

Jay Bahlis

30 July 2018 02:04 PM
Based on Cost Manual, the Annual Productive days for DND is typically 216 days.

1.8 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:

- **Online Tour:** a slide show that highlights ADVISOR's main features. It is presented after User logs on ADVISOR. You can hide and redisplay by unchecking or rechecking the ADVISOR Tour field under the **Options** tab, under the Preferences node under the Personalize tab and clicking Save.
- **Video Clips** to gain a better understanding of ADVISOR's main functions and features. To view, please visit the following: <http://www.bnhexpertsoft.com/how-to-video-overview/>.
- **Step-by-Step Guides** for configuring ADVISOR, as well as conducting mission analysis, system analysis, competency analysis, job task analysis, media analysis, cost analysis, fidelity analysis, performance analysis, etc. To view and download, please visit the following: <http://www.bnhexpertsoft.com/user-guides/>.
- **Answers to Frequently Asked Questions** are available online at: <http://www.bnhexpertsoft.com/faq-1-install/>.
- **Context Sensitive Online Help** can be displayed for each screen by clicking on Help  button. Context sensitive video clips are also embedded throughout ADVISOR and can be viewed by clicking on the video  icon.
- **Basic Excel Data Collection Forms** for various ADVISOR data elements along with data import instructions are available online at: <http://www.bnhexpertsoft.com/data-collection-forms/>.
- **Detailed Excel Data Collection Forms** for Project Tasks, System/Competency Tasks and Job Tasks along with data import instructions are available online at: <http://www.bnhexpertsoft.com/import-detailed-analysis/>.
- **Sample Reports** from each module are available online at: <http://www.bnhexpertsoft.com/reports/>.
- **Technical Support:** Available 8:00 am to 6:00 pm EST by calling 1 (514) 745-4010. You may also fax your questions to 1 (514) 745-4011 or E-mail to support@bnhexpertsoft.com.

1.9 References

Van Buren, Mark and Woodwell, William Jr. (2000), The 2000 ASTD Trends Report: Staying Ahead of the Winds of Change”, American Society for Training and Development, Alexandria, Virginia.

Chapter 2: Setup Course Attributes & Search Criteria

2.1 Introduction

All courses are automatically associated with a Client, a Manager (User) as well as a period of time. This allows you to easily determine the operating expenses (budget) and resources needed by a Client or a Manager for any given time period.

Furthermore, Course Attributes can also be setup along with Search Criteria to further zero-in on specific requirements. For example, to identify courses including time, money and resources needed to develop specific skills, train account executives, certify technicians or common among multiple jobs.

To make effective use of the Attributes function, requirements should be clearly defined. In other words, how data from various Courses should be compiled and viewed – for example by region, product, service or other criteria. Although there is no limit on the number of criterion that can be created, since Users will have to classify courses accordingly – this activity should be carefully planned.

2.2 Setup Attributes

Attributes provide a simple, yet powerful tool for mining data from various Courses – i.e., compile and present results from a variety of angles. For example, identify Courses required by a specific Job, delivered at a specific location or various combinations. To create a new attribute:

Step 1: Click the Setup Tab, click  next to the **Advanced Functions** folder, and then select the **Set-up Attributes** Folder.

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

Step 3: Input the Question or Statement of the new attribute (Location, for example), specify the Client that the attribute is associated with and other parameters.

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



Next, Options for each Attribute should be specified. Since Users rely on this description to classify training course/activities, the title should be clear and descriptive. To define Options for an Attribute:

Step 1: Click on  next to title to expand,  **Location** node for example, and click on  **Options** folder.

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

Step 3: Input the Option title and other details.





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



Note: Attributes and Options will only be presented for Courses assigned to the same Client. You can add more Options by repeating the steps above. There is no limit on the number of Options that can be created for each Attribute.

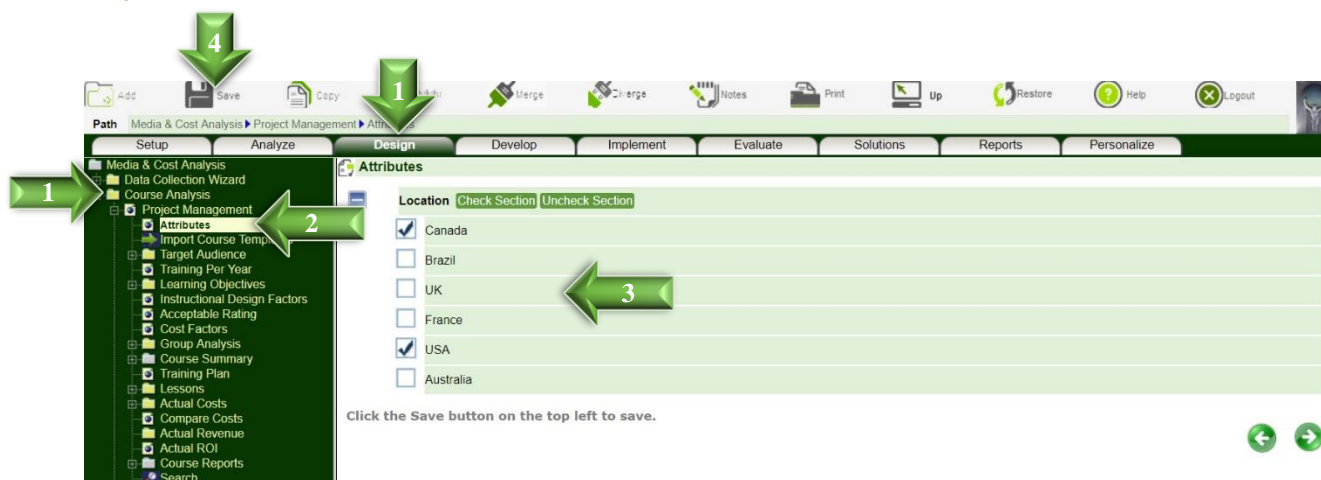
Once created, the Attributes can assigned specific Courses as follows:




Step 1: Click the **[Design]** Tab, and click  next the  **Course Analysis** folder.

Step 2: Click  next to  **(course title)** to expand and click the  **Attributes** node. Relevant attributes, created under the  **Set-up Attributes** Folder are presented. In other words, only attributes associated with same Client as Course are presented.

Step 3: Select Course Attributes.

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



Note:  **Attributes** node for each  **(course)** presents all attributes created under  **Set-up Attributes** folder associated with same Client as well as those belonging to Client's Sub Divisions.

2.3 Define Search Criteria

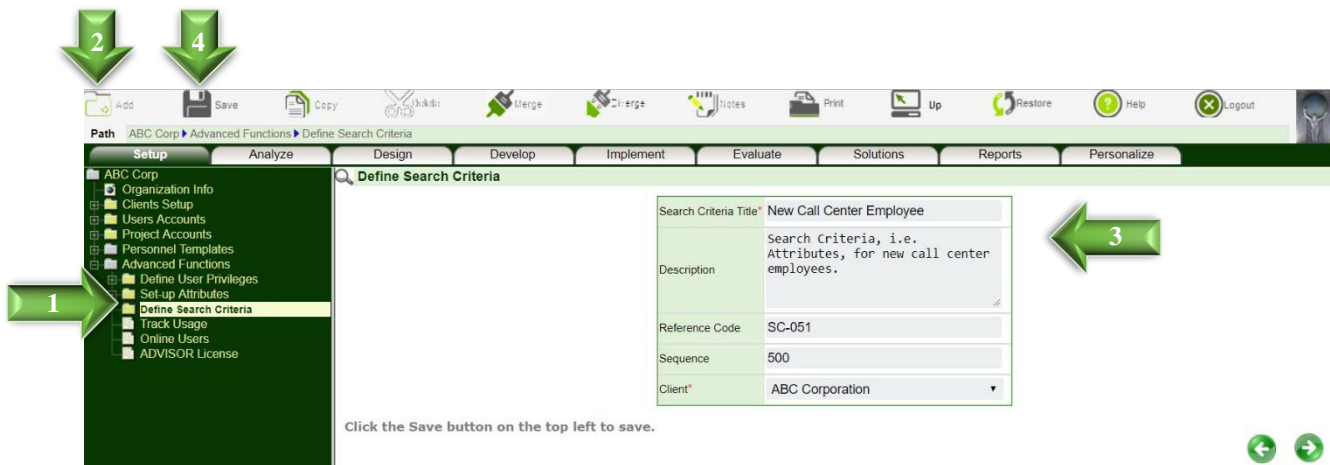
Each Attribute identifies a single parameter, for example, trainees' location, occupation, experience, competency, type of product, etc. To zero in on the required training data, you may define search criteria that combine multiple Course Attributes. For example, to determine the cost of training a new, call center employee in the United States, three criteria should be combined – experience of the target audience (new), occupation (call center employee) and location (United States). To create a new Search Criteria:

Step 1: Go to the [Setup] Tab, click  next to the  **Advanced Functions** folder and click on  **Define Search Criteria** folder.

Step 2: Click on the [Add] button.

Step 3: Input the title of the new Search Criteria, a brief description, the Client the Search Criteria should be associated with and other required parameters.

Step 4: Click the [Save] button to create.



Note:

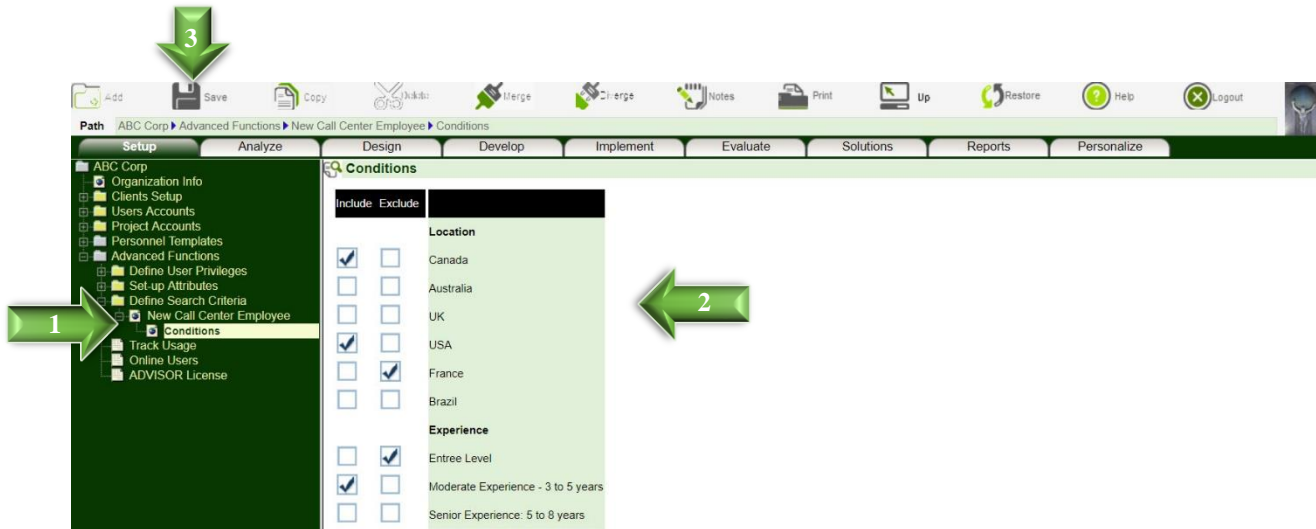
➤ Search Criteria assigned to a specific Client can only be leveraged by Users assigned to the same Client.

Next the conditions for the Search Criterion should be indicated. The Search may include, exclude or ignore (blank) Options for each Attribute. You can combine these parameters to zero in on the required data. To specify the conditions for the Search Criteria:

Step 1: Click  next to  (search criteria) node,  New Call Center Employee node for example, and click on the  Conditions node.

Step 2: Specify the required conditions by placing checkmarks next to the desired options.

Step 3: Click the [Save] button.



Notes:

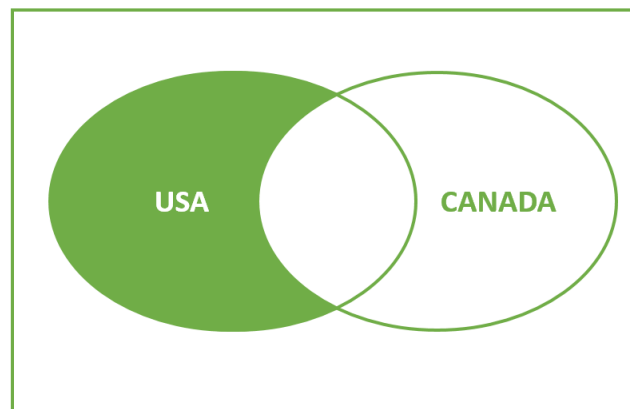
- Once created, the Search Criteria may be used to zero in on required data in all reports under the [Reports] tab, by Users assigned to the same client.

Three possibilities can be specified for each option – namely include, exclude or ignore (i.e., keep blank). To illustrate the power and flexibility of this function, a simple example is presented below.

Assuming that several Courses are being offered in the USA and Canada, and we wish to find out the following:

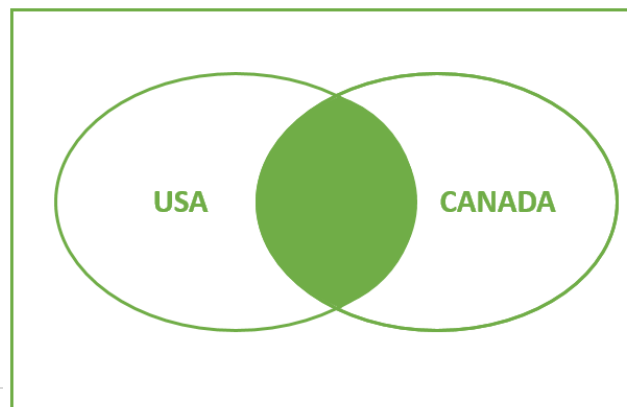
Option #1

Requirement	Conditions
Courses offered only in USA – i.e., do not include courses offered jointly in the USA and Canada.	Check: Include USA box and Exclude Canada box



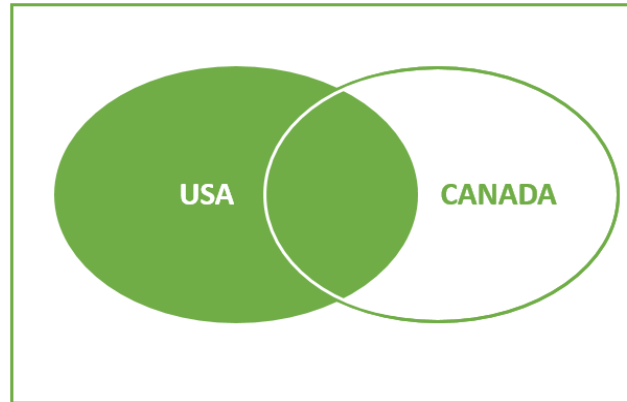
Option #2

Requirement	Conditions
Courses offered in both the USA and Canada – i.e., do not include courses offered in only one country. In other words, courses that are not offered in both the USA and Canada should not be included, in this case.	Check: Include USA box and Include Canada box



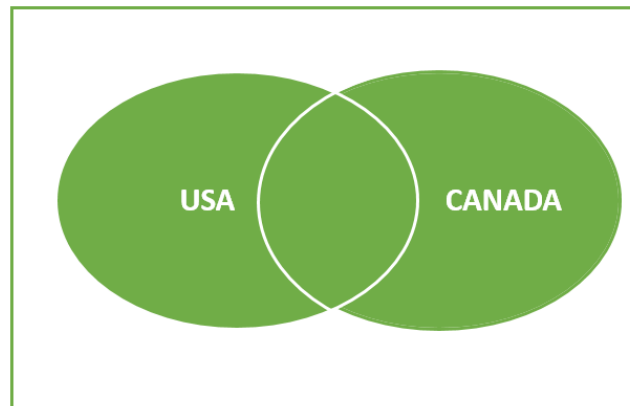
Option #3

Requirement	Conditions
Courses offered in the USA – i.e., include courses that are only offered in the USA as well as those offered in both the USA and Canada.	Check: Include USA box



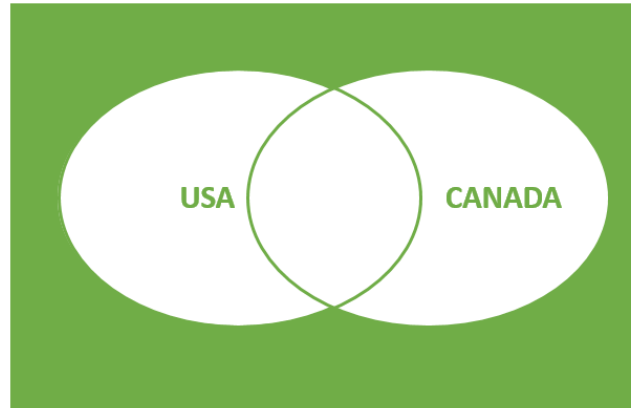
Option #4

Requirement	Conditions
Courses offered in the USA and Canada – i.e., include all courses whether offered in the USA, Canada or both countries.	Do not check any box - i.e., leave all boxes blank



Option #5

Requirement	Conditions
Courses that are not offered in the USA and Canada – i.e., courses offered in countries other than USA and Canada. In other words, any course offered in either the USA or Canada should not be included.	Check: Exclude USA box Exclude Canada box



2.4 Final Notes

The primary objective of Attributes and Search Criteria is to setup filters that can help you isolate, compile and compare the costs and resources needed by various training programs. By leveraging these capabilities, you can quickly zero-in on desired Courses, and minimize waste by identifying and duplicating training programs that are running effectively as well as correcting problem areas.

Chapter 3: Training Requirements

3.1 Overview

Provides a quick snap shot of training activities planned this quarter, next quarter or next year; as well as the training requirements for each job/employee. The reports can be accessed under the **Training Requirements & Benchmarks** folder under the [Reports] tab. Brief description of key reports is presented below.

3.2 Training Activities Report

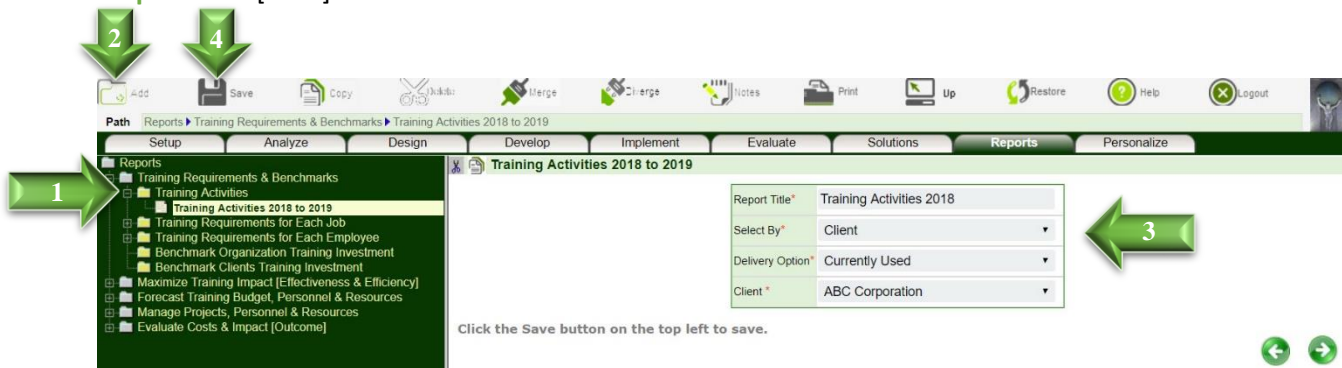
Generates a summary of planned Training Courses/Activities for selected time period. Reports for each course/activity, the # of Trainees, Target Audience, Frequency, Media, Length, Personnel/Facility Requirements and how well the Course is aligned with operational requirements. To generate:

Step 1: Click  next to **Training Requirements & Benchmarks** folder and click on the **Training Activities** folder.

Step 2: Click on the [Add] button.

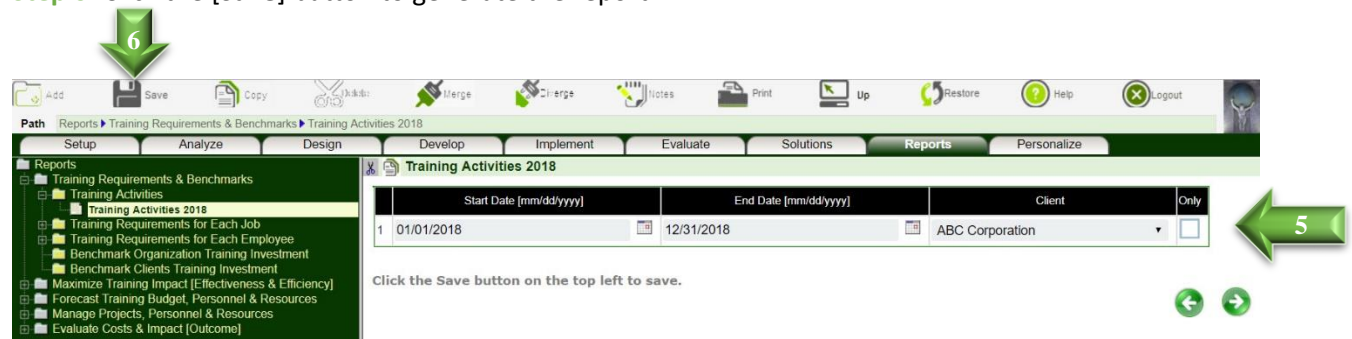
Step 3: Input Report Title, Select By (Client, User, Course), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click [Save] to advance to the next screen.



Step 5: Specify the time period i.e., the Start and End Dates, as well as other relevant parameters.

Step 6: Click the [Save] button to generate the report.



The report is presented in html format, in a new window. You may print or save the report using the corresponding functions in your Browser.

Step 7: You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner).

Step 8: To return to ADVISOR, close the Report window.

Generate Excel

7

Training Activities Report

Period: 2017-01-01 to 2017-01-31
Prepared by: BNH Director
Date: September 2017

Course Title	Reference Code	# of Trainees	Client	Target Audience	Type	Frequency	Delivery Media	Length (hrs)	Personnel	Facilities	Alignment
Leadership: Decisiveness Intro	L01	100	ABC	Online Managers	Knowledge	16	CBT	4	Leadership Instructor	Computer Lab	Low
Leadership: Developing Others	L03	75	ABC	Supervisors	Knowledge	9	Webex	8	Leadership Instructor	Classroom	Medium
Leadership: Influencing/Negotiating	L04	60	ABC	Supervisors	Knowledge	7	ILT	8	Leadership Instructor	Classroom	Medium
Leadership: Leveraging Diversity Intro	L05	75	ABC	Online Managers	Knowledge	7	CBT	4	Diversity Instructor	Computer Lab	High
Leadership: Team Building Intro	L07	30	ABC	Online Managers	Knowledge	3	CBT	4	Team Building Instructor	Computer Lab	High
Leadership: Decisiveness Advanced	L02	50	ABC	Supervisors	Knowledge	8	ILT	4	Leadership Instructor	Classroom	Medium
Leadership: Leveraging Diversity Advanced	L06	40	ABC	Senior Managers	Knowledge	6	ILT	4	Diversity Instructor	Classroom	Low
Leadership: Team Building Advanced	L08	20	ABC	Supervisors	Knowledge	3	ILT	4	Team Building Instructor	Classroom	Medium
General: Accountability Intro	G01	80	ABC	Online Managers	Knowledge	8	CBT	4	Communication Instructor	Computer Lab	High
General: Accountability Advanced	G02	40	ABC	Supervisors	Knowledge	6	ILT	4	Communication Instructor	Classroom	High
General: Change Management Intro	G03	60	ABC	Online Managers	Knowledge	6	ILT	4	Change Management Instructor	Classroom	High
General: Change Management Advanced	G04	35	ABC	Supervisors	Knowledge	5	ILT	4	Change Management Instructor	Classroom	Medium
General: Communication Intro	G05	120	ABC	Online Managers	Knowledge	12	CBT	4	Communication Instructor	Computer Lab	Low
General: Communication Advanced	G06	65	ABC	Supervisors	Knowledge	10	ILT	4	Communication Instructor	Classroom	Low
Total		850						64			

3.3 Training Requirements for Each Job Report

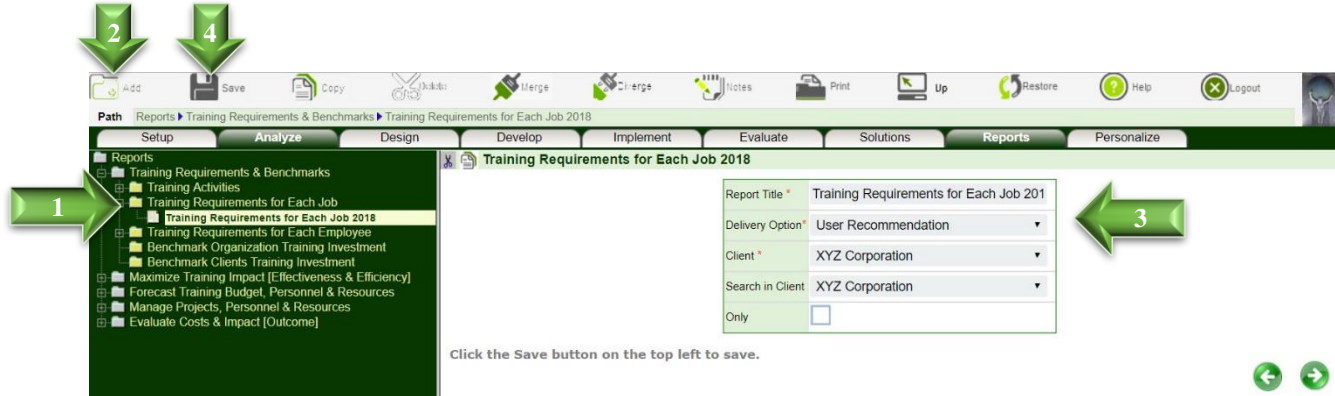
Generates a summary of Training Courses/Activities that each Job/Position is required to complete - including Media and Length. To generate:

Step 1: Click on the  **Training Requirements for Each Job** folder.

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

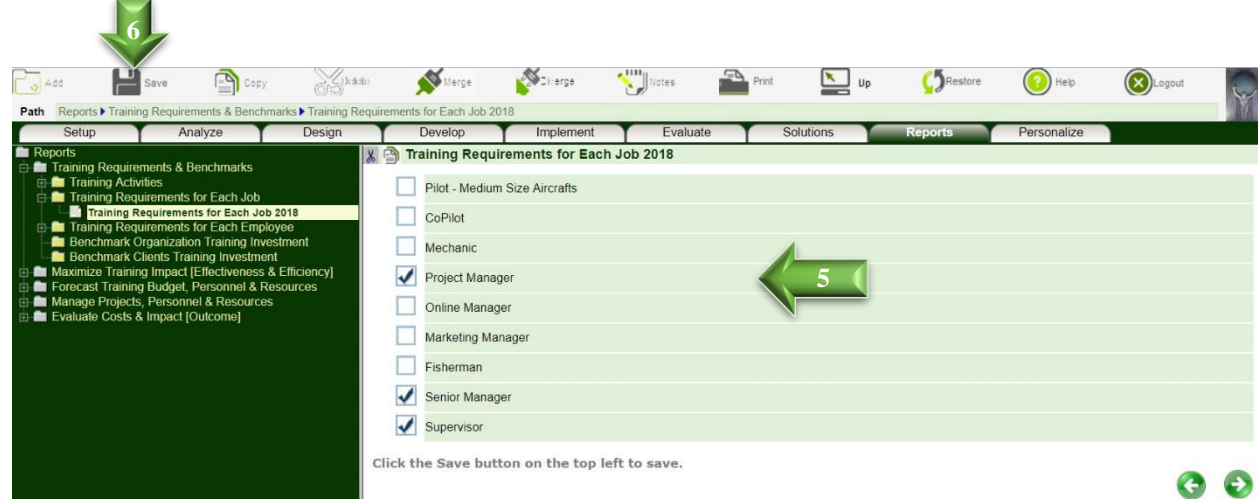
Step 3: Input the Report Title, whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Step 5: Select Jobs to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



The report is presented in html format, in a new window. You may print or save the report using the corresponding functions in your Browser.

Step 7: You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner).

Step 8: To return to ADVISOR, close the Report window.

Generate Excel



Training Requirements for Each Job Report

Client: ABC Corp
Prepared by: BNH Director
Date: September 2017

Online Manager

Course Title	Reference Code	Group Title	Delivery Media	Length (hrs)
Leadership: Decisiveness Intro	L01	Knowledge	CBT	4
Leadership: Leveraging Diversity Intro	L05	Knowledge	CBT	4
Leadership: Team Building Intro	L07	Knowledge	Webex	4
General: Accountability Intro	G01	Knowledge	Webex	4
General: Change Management Intro	G03	Knowledge	ILT	4
General: Communication Intro	G05	Knowledge	Webex	4
Total				24

Supervisor

Course Title	Reference Code	Group Title	Delivery Media	Length (hrs)
Leadership: Developing Others	L03	Knowledge	ILT	8
Leadership: Influencing/Negotiating	L04	Knowledge	ILT	8
Leadership: Decisiveness Advanced	L02	Knowledge	ILT	4
Leadership: Team Building Advanced	L08	Knowledge	ILT	4
General: Accountability Advanced	G02	Knowledge	ILT	4
General: Change Management Advanced	G04	Knowledge	ILT	4
General: Communication Advanced	G06	Knowledge	ILT	4
Total				36

3.4 Training Requirements for Each Employee Report

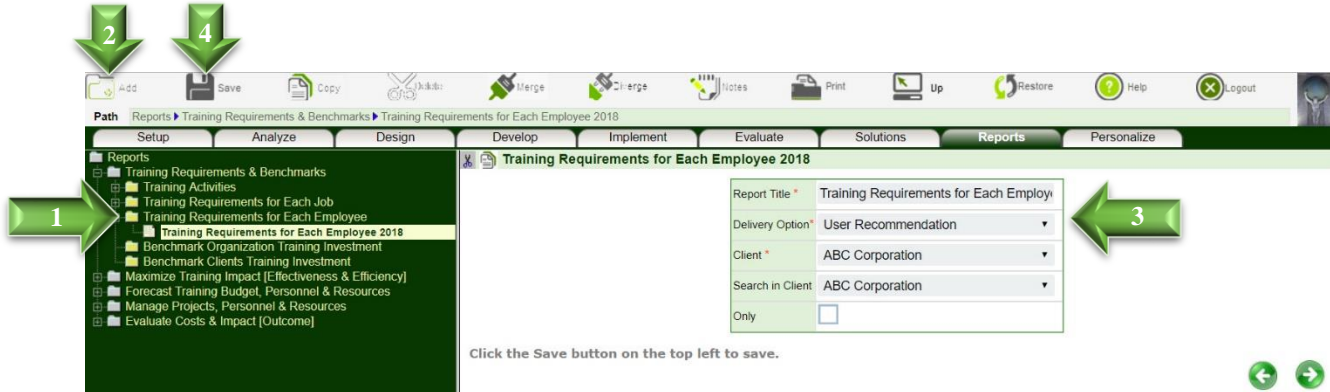
Generates a summary of Training Courses/Activities that each employee is required to complete – including Media, Length and whether or not it has been completed. To generate:

Step 1: Click on the  **Training Requirements for Each Employee** folder.

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

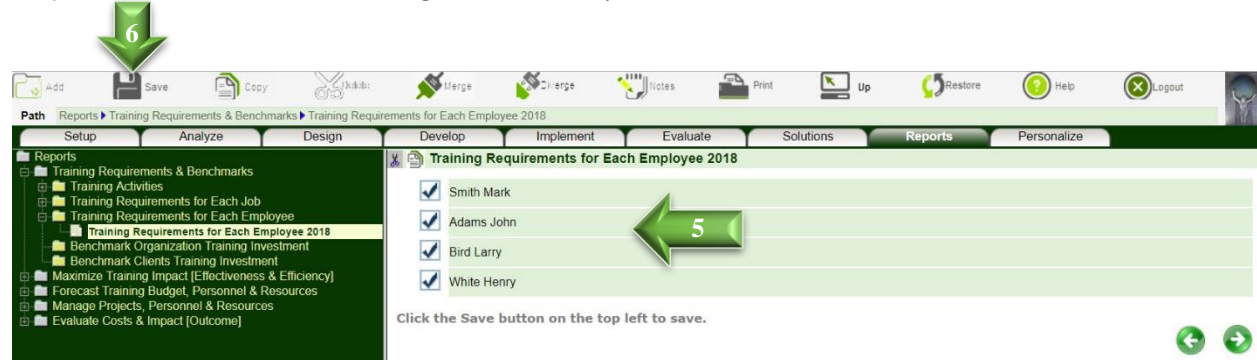
Step 3: Input the Report Title, whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Step 5: Select Employees to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



The report is presented in html format, in a new window. You may print or save the report using the corresponding functions in your Browser.

Step 7: You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner).

Step 8: To return to ADVISOR, close the Report window.



Training Requirements for Each Employee Report

Prepared by:
Date

ABC Corp
BNH Director
September 2017

Fred Jones

Course Title	Reference Code	Group Title	Delivery Media	Length (hrs)	Completed
Leadership: Decisiveness Advanced	L02	Knowledge	ILT	4	-
Leadership: Developing Others	L03	Knowledge	ILT	8	-
General: Change Management Advanced	G04	Knowledge	ILT	4	-
Leadership: Team Building Advanced	L08	Knowledge	ILT	4	-
Leadership: Decisiveness Intro	L01	Knowledge	CBT	4	-
Total				24	

John Smith

Course Title	Reference Code	Group Title	Delivery Media	Length (hrs)	Completed
Leadership: Leveraging Diversity Intro	L05	Knowledge	CBT	4	-
Leadership: Developing Others	L03	Knowledge	ILT	8	Yes
General: Change Management Intro	G03	Knowledge	ILT	4	-
Leadership: Decisiveness Intro	L01	Knowledge	CBT	4	No
Leadership: Influencing/Negotiating	L04	Knowledge	ILT	8	No
General: Accountability Intro	G01	Knowledge	Webex	4	-
General: Communication Intro	G05	Knowledge	Webex	4	-
Total				36	

3.5 Benchmark Organization Training Investment Report

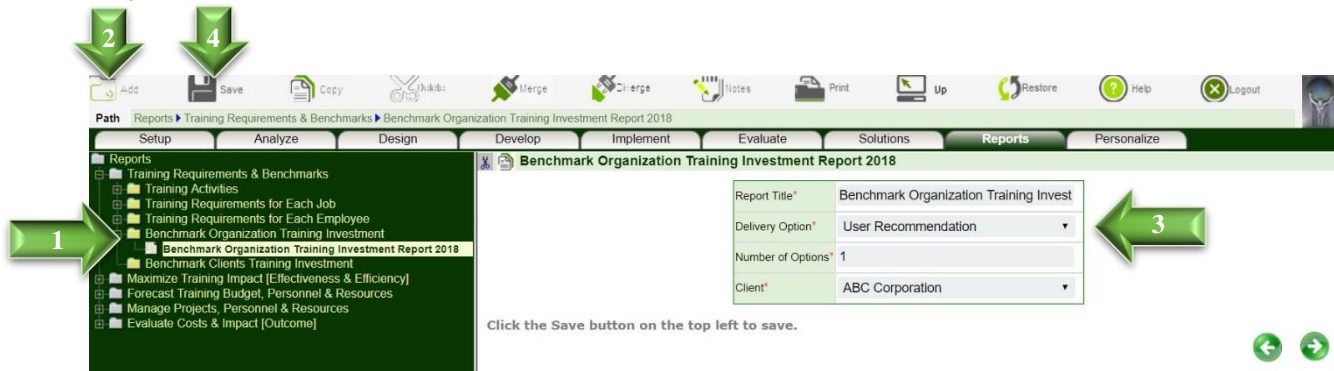
Generates ATD equivalent benchmark report to gauge training investment relative to peers, competition or over time. Computes and presents several key indicators including: Training Expenditure per Employee, Training Expenditure as % of Payroll and so forth. To generate:

Step 1: Click on the **Benchmark Organization Training Investment** folder.

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

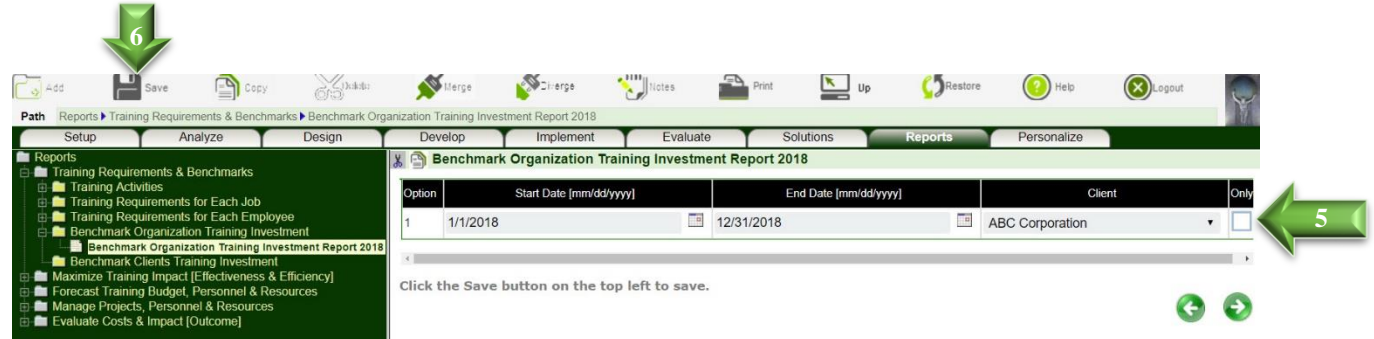
Step 3: Input the Report Title, whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, Number of Options to compare (maximum 4) and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Step 5: Specify the time period, i.e. the Start and End Dates, as well as other relevant parameters.

Step 6: Click the **[Save]** button to generate the report.



Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.



Benchmark Organization Training Investment Report

Prepared by: BNH Director
 Date: September 2018
 Delivery Option: User Recommended

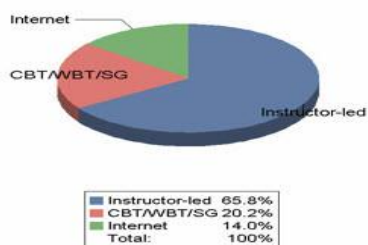
Total Cost

Option 1

Training Expenditure per Employee	\$6,829
Training Expenditure as % of Payroll	13.66%
Percentage of Employees Receiving Training	50.00%
Employee to Trainer Ratio	50
Total Hours of Training per Eligible Employee	23
% of Total Training Expenditures Going Externally	79.93%

Use of Delivery Methods

Option 1



ABC Corp

[Generated by Advisor](#)

Step 8: Click the [Next] button to advance to the next page of the report.

Step 9: To return to ADVISOR, close the Report window.

Courses Analyzed

Option 1 (January 01, 2018 to December 31, 2018)

Course Title	Training Division	Manager	Start Date (Year)	Currency
Accountability	Operations	BNH Director	2018	US Dollar
Change Management	Operations	BNH Director	2018	US Dollar
Communication	Operations	BNH Director	2018	US Dollar
Decisiveness	Operations	BNH Director	2018	US Dollar
Developing Others	Operations	BNH Director	2018	US Dollar
Influencing/Negotiating	Operations	BNH Director	2018	US Dollar
Leveraging Diversity	Operations	BNH Director	2018	US Dollar
Team Building	Operations	BNH Director	2018	US Dollar

* Course Title Dimmed = Incomplete

3.6 Benchmark Clients Training Investment Report

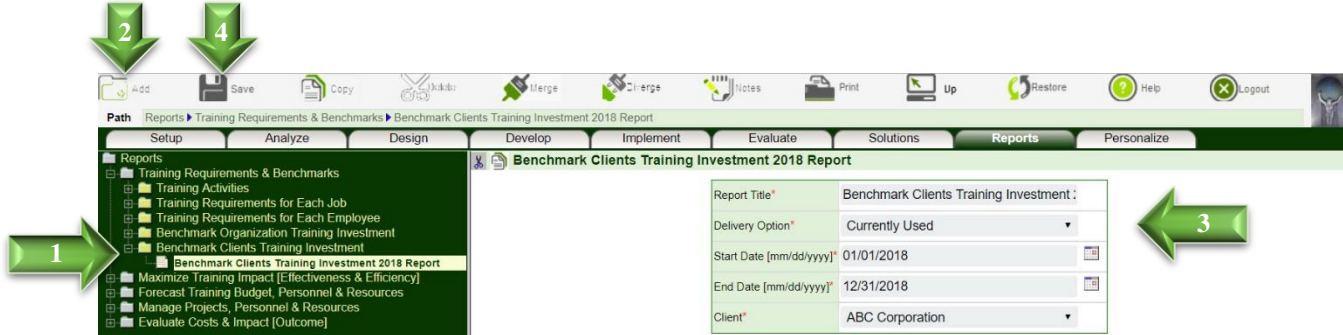
Generates ATD equivalent benchmark report to gauge Clients' training investment relative to peers, competition or over time. Computes and presents several key indicators including: Training Expenditure per Employee, Training Expenditure as % of Payroll and so forth. To generate:

Step 1: Click on the  **Benchmark Clients Training Investment** folder.

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

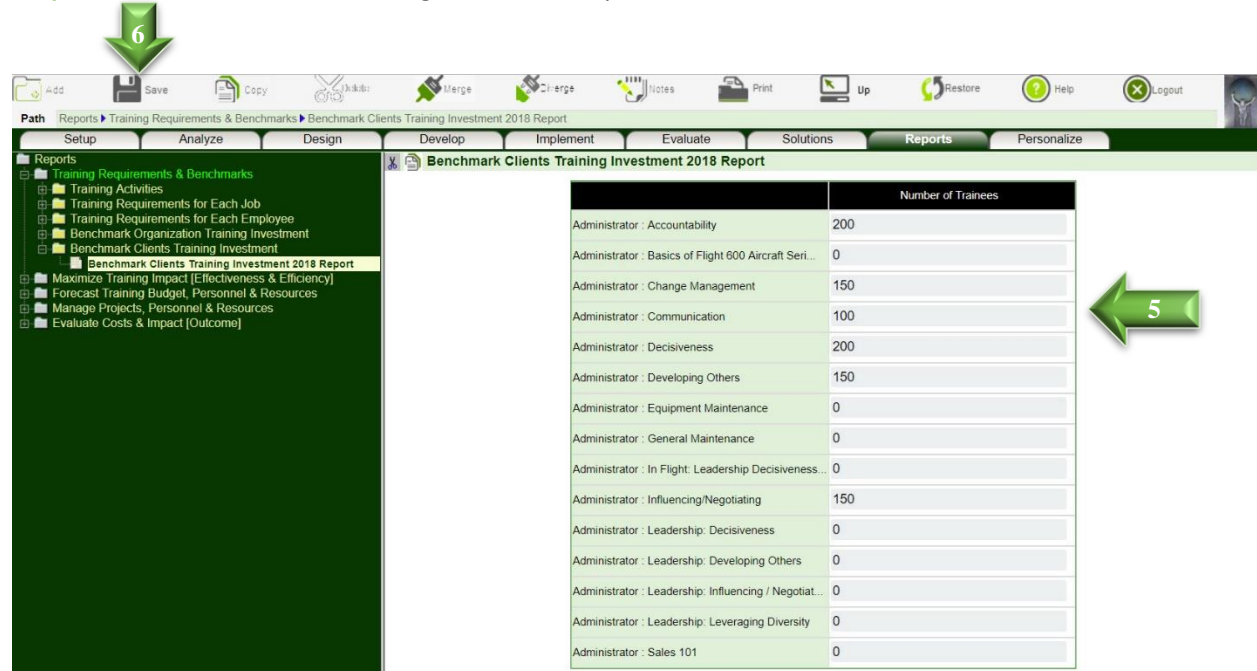
Step 3: Input the Report Title, whether the report should be based on the "Currently Used" or "User Recommendation" Delivery Option, Start and End Dates and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Step 5: Input the number of individuals that will or have attended each course within the specified time period.

Step 6: Click the **[Save]** button to generate the report.



Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left of corner.

Step 8: To return to ADVISOR, close the Report window.



Benchmark Clients Training Investment Report

Parameters: January 01, 2018 to December 31, 2018

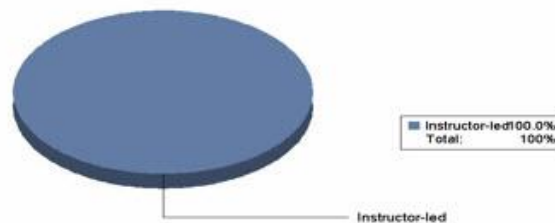
Prepared by: BNH Director

Date: September 2018

Delivery Option: Currently Used

	ABC Corp
Training Expenditure per Employee	\$331
Training Expenditure as % of Payroll	0.66%
Percentage of Employees Receiving Training	50.00%
Employee to Trainer Ratio	50
Total Hours of Training per Employee	2

Use of Delivery Methods



Courses Analyzed

ABC Corp (January 01, 2018 to December 31, 2018)

Course Title	Training Division	Manager	Start Date (Year)	Currency
Accountability	US Department of Treasury	BNH Director	2018	US Dollar
Change Management	US Department of Treasury	BNH Director	2018	US Dollar
Communication	US Department of Treasury	BNH Director	2018	US Dollar
Decisiveness	US Department of Treasury	BNH Director	2018	US Dollar
Developing Others	US Department of Treasury	BNH Director	2018	US Dollar
Influencing/Negotiating	US Department of Treasury	BNH Director	2018	US Dollar

* Course Title Dimmed = Incomplete

Chapter 4: Maximize Training Impact

4.1 Overview

Drives training effectiveness and efficiency by: (a) mapping current and future training courses/activities to operational requirements to identify gaps, duplications, and courses/activities that are no longer relevant; (b) forecasting and comparing the costs of viable delivery options; (c) identifying centers of excellence; and (d) preserving training integrity – i.e., identify courses, lessons, activities and objectives that could be impacted by a change to system, reference or policy. The reports can be accessed under the **Maximize Training Impact [Effectiveness & Efficiency]** folder under the **[Reports]** tab. Brief description of key reports is presented below.

4.2 Identify Training Creep Report

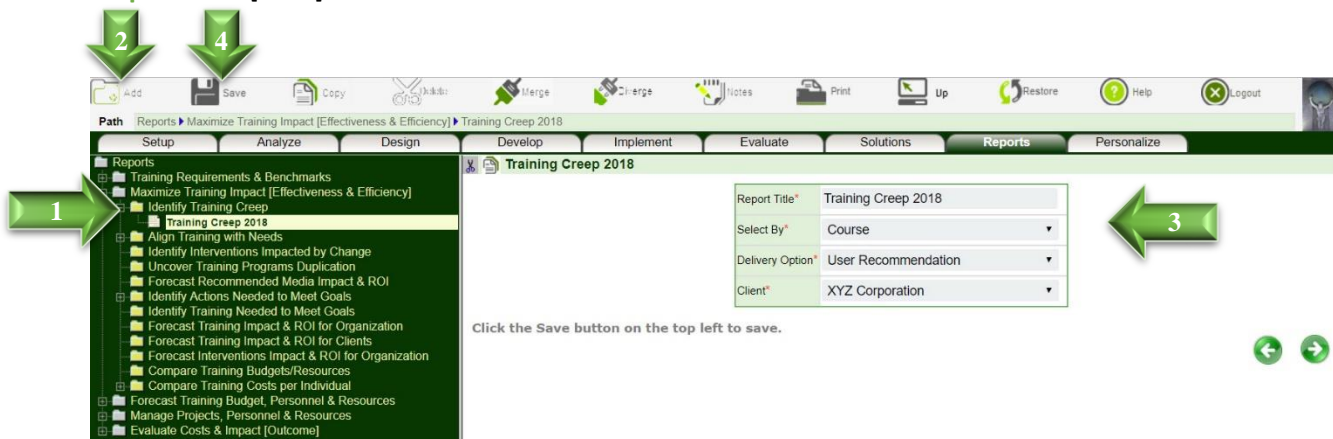
Identifies Training Courses/Activities with minimal or no value by mapping the Learning Objectives in each course to operational requirements – i.e., the Knowledge, Skills and Attitudes (KSAs), Objectives and Tasks required by Target Audience (Job/Position) to perform duties and attain missions/goals. To generate:

Step 1: Click  next to **Maximize Training Impact** folder and click on the **Identify Training Creep** folder.

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

Step 3: Input the Report Title, select By (Client, User, Course), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.

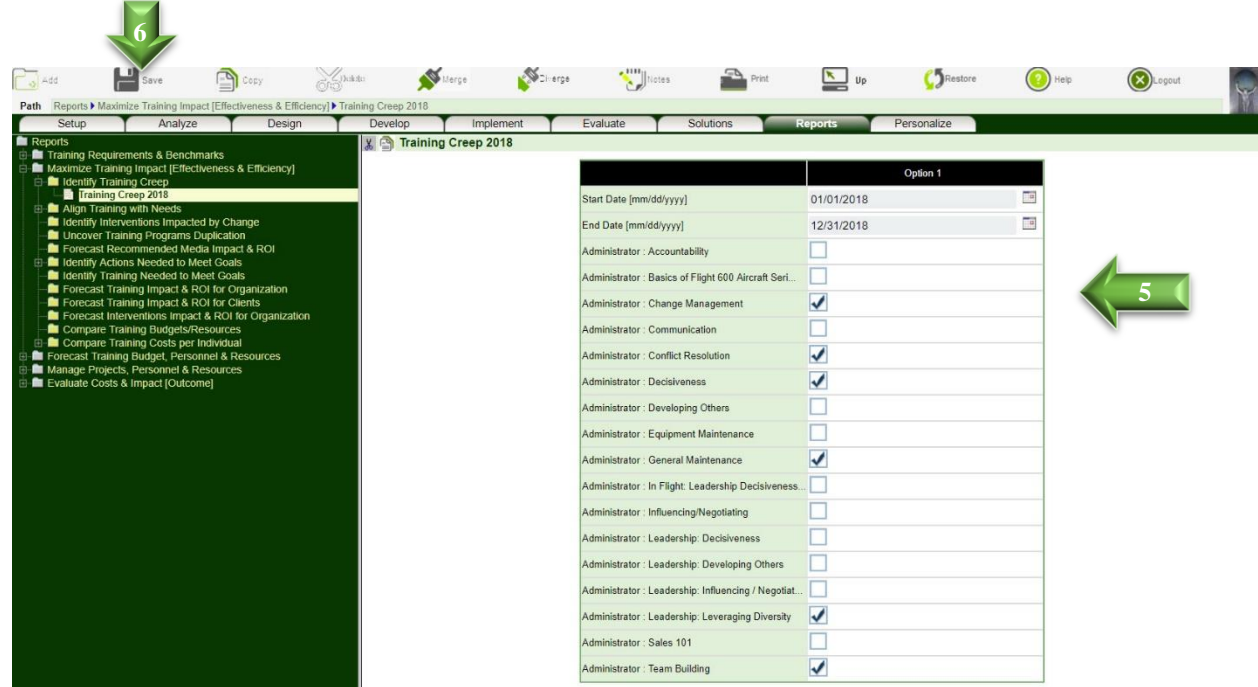


The screenshot shows the software interface with the following elements:

- Top Toolbar:** Contains buttons for Add, Save, Copy, Paste, Merge, Split, Notes, Print, Up, Restore, Help, and Logout.
- Path Bar:** Shows the navigation path: Reports > Maximize Training Impact [Effectiveness & Efficiency] > Training Creep 2018.
- Left Sidebar (Reports):** A tree view showing the hierarchy of reports. The 'Identify Training Creep' folder is highlighted under the 'Maximize Training Impact [Effectiveness & Efficiency]' folder.
- Main Form:** A form titled 'Training Creep 2018' with the following fields:
 - Report Title*: Training Creep 2018
 - Select By*: Course (dropdown menu)
 - Delivery Option*: User Recommendation (dropdown menu)
 - Client*: XYZ Corporation (dropdown menu)
- Instructions:** A text box below the form says 'Click the Save button on the top left to save.'
- Navigation:** Green arrows with numbers 1 through 4 indicate the steps: 1 points to the 'Identify Training Creep' folder, 2 points to the 'Add' button, 3 points to the form fields, and 4 points to the 'Save' button.

Step 5: Specify the time period, i.e., the Start and End Dates, as well as select Courses to be included in the Report.

Step 6: Click the [Save] button to generate the report.



Path: Reports > Maximize Training Impact [Effectiveness & Efficiency] > Training Creep 2018

Setup Analyze Design Develop Implement Evaluate Solutions Reports Personalize

Reports

- Training Requirements & Benchmarks
- Maximize Training Impact [Effectiveness & Efficiency]
 - Identify Training Creep
 - Training Creep 2018

Align Training with Needs

- Identify Interventions Impacted by Change
- Uncover Training Programs Duplication
- Forecast Recommended Media Impact & ROI
- Identify Actions Needed to Meet Goals
- Identify Training Needed to Meet Goals
- Forecast Training Impact & ROI for Organization
- Forecast Training Impact & ROI for Clients
- Forecast Interventions Impact & ROI for Organization
- Compare Training Budgets/Resources
- Forecast Training Budget, Personnel & Resources
- Manage Projects, Personnel & Resources
- Evaluate Costs & Impact [Outcome]

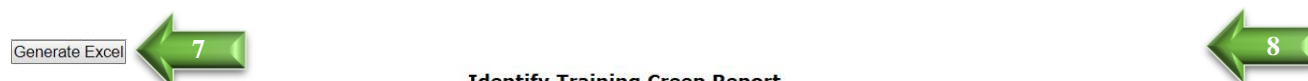
Training Creep 2018

	Option 1
Start Date [mm/dd/yyyy]	01/01/2018
End Date [mm/dd/yyyy]	12/31/2018
Administrator : Accountability	<input type="checkbox"/>
Administrator : Basics of Flight 600 Aircraft Ser...	<input type="checkbox"/>
Administrator : Change Management	<input checked="" type="checkbox"/>
Administrator : Communication	<input type="checkbox"/>
Administrator : Conflict Resolution	<input checked="" type="checkbox"/>
Administrator : Decisiveness	<input checked="" type="checkbox"/>
Administrator : Developing Others	<input type="checkbox"/>
Administrator : Equipment Maintenance	<input type="checkbox"/>
Administrator : General Maintenance	<input checked="" type="checkbox"/>
Administrator : In Flight Leadership Decisiveness...	<input type="checkbox"/>
Administrator : Influencing/Negotiating	<input type="checkbox"/>
Administrator : Leadership: Decisiveness	<input type="checkbox"/>
Administrator : Leadership: Developing Others	<input type="checkbox"/>
Administrator : Leadership: Influencing / Negotiat...	<input type="checkbox"/>
Administrator : Leadership: Leveraging Diversity	<input checked="" type="checkbox"/>
Administrator : Sales 101	<input type="checkbox"/>
Administrator : Team Building	<input checked="" type="checkbox"/>

The report is presented in html format, in a new window. You may print or save the report using the corresponding functions in your Browser.

Step 7: You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner).

Step 8: To return to ADVISOR, close the Report window.



Identify Training Creep Report

for Recommended Delivery Option

Period: Jan 1, 2018 to Dec 31, 2018
 Prepared by: BNH Director
 Date: September 2018

Course Title	Reference Code	# of Trainees	Client	Target Audience	Group Title	Frequency	Delivery Media	Length (hrs)	Alignment
Decisiveness	L01	100	ABC Corp	Online Managers	Knowledge	16	CBT	14	High
Conflict Resolution	L02	50	ABC Corp	Online Managers	Knowledge	8	ILT	4	Medium
Leveraging Diversity	L06	40	ABC Corp	Online Managers	Knowledge	6	ILT	4	Low
Team Building	L08	20	ABC Corp	Online Managers	Knowledge	3	ILT	6	Low
Change Management	G04	35	ABC Corp	Online Managers	Knowledge	5	ILT	4	Low
Total		245						32	

Decisiveness

Learning Objective	Length	Knowledge/Skills	Performance Objective	Tasks	Job Title
Decisiveness overview	1				Online Managers
Describe key elements of a goal	1	Describe key elements of a goal	Set Goals	Set Goals	Online Managers
Validate the viability of goals	1	Validate the viability of goals	Set Goals	Set Goals	Online Managers
Write clear and concise goals	1.5	Write clear and concise goals	Set Goals	Set Goals	Online Managers
Implement incentive system	1	Implement incentive system	Motivate Employees	Motivate Employees	Online Managers
Measure employees engagement	1	Measure employees engagement	Motivate Employees	Motivate Employees	Online Managers
Write clear and concise core values	1	Write clear and concise core values	Affirm Values	Affirm Values	Online Managers
Communicate importance of core values	1	Communicate importance of core values	Affirm Values	Affirm Values	Online Managers
Select appropriate venue for prioritizing goals	1	Select appropriate venue for prioritizing goals	Prioritize Goals	Prioritize Goals	Online Managers
Prioritize goals	1	Prioritize goals	Prioritize Goals	Prioritize Goals	Online Managers
Implement design	0.5	Implement design	Design Processes	Design Processes	Online Managers
Describe various implementation procedures	0.25	Describe various implementation procedures	Set Course of Action	Set Course of Action	Online Managers
Select appropriate implementation procedure	0.25	Select appropriate implementation procedure	Set Course of Action	Set Course of Action	Online Managers
Implement procedures	0.5	Implement procedures	Set Course of Action	Set Course of Action	Online Managers
Describe key steps in project management	0.25				Online Managers
Develop project management plan	0.5				Online Managers
Monitor progress	0.25				Online Managers
Describe various conflict resolution procedures	0.25	Describe various conflict resolution procedures	Resolve Conflicts	Resolve Conflicts	Online Managers
Select appropriate procedures	0.25	Select appropriate procedures	Resolve Conflicts	Resolve Conflicts	Online Managers
Implement conflict resolution procedures	0.25	Implement conflict resolution procedures	Resolve Conflicts	Resolve Conflicts	Online Managers
Validate outcomes	0.25	Validate outcomes	Resolve Conflicts	Resolve Conflicts	Online Managers

Learning Objectives that do not support a specific KSA, Objective, Task or Job may not be required - i.e., add value.

Conflict Resolution

Learning Objective	Length	Knowledge/Skills	Performance Objective	Tasks	Job Title
Conflict Resolution overview	1				Online Managers
Describe various implementation procedures	0.25	Describe various implementation procedures	Set Course of Action	Set Course of Action	Online Managers
Select appropriate implementation procedure	0.25	Select appropriate implementation procedure	Set Course of Action	Set Course of Action	Online Managers
Implement procedures	0.5	Implement procedures	Set Course of Action	Set Course of Action	Online Managers
Describe key steps in project management	0.25				Online Managers
Develop project management plan	0.5				Online Managers
Monitor progress	0.25				Online Managers
Describe various conflict resolution procedures	0.25	Describe various conflict resolution procedures	Resolve Conflicts	Resolve Conflicts	Online Managers
Select appropriate procedures	0.25	Select appropriate procedures	Resolve Conflicts	Resolve Conflicts	Online Managers
Implement conflict resolution procedures	0.25	Implement conflict resolution procedures	Resolve Conflicts	Resolve Conflicts	Online Managers
Validate outcomes	0.25	Validate outcomes	Resolve Conflicts	Resolve Conflicts	Online Managers

Leveraging Diversity

Learning Objective	Length	Knowledge/Skills	Performance Objective	Tasks	Job Title
Leveraging Diversity Overview	4				Online Managers

Team Building

Learning Objective	Length	Knowledge/Skills	Performance Objective	Tasks	Job Title
Team Building Overview	6				Online Managers

Change Management

Learning Objective	Length	Knowledge/Skills	Performance Objective	Tasks	Job Title
Change Management Overview	4				Online Managers

Learning Objectives that do not support a specific KSA, Objective or Task may not be required by the Job - i.e., add value.

4.3 Align Training with Needs Report

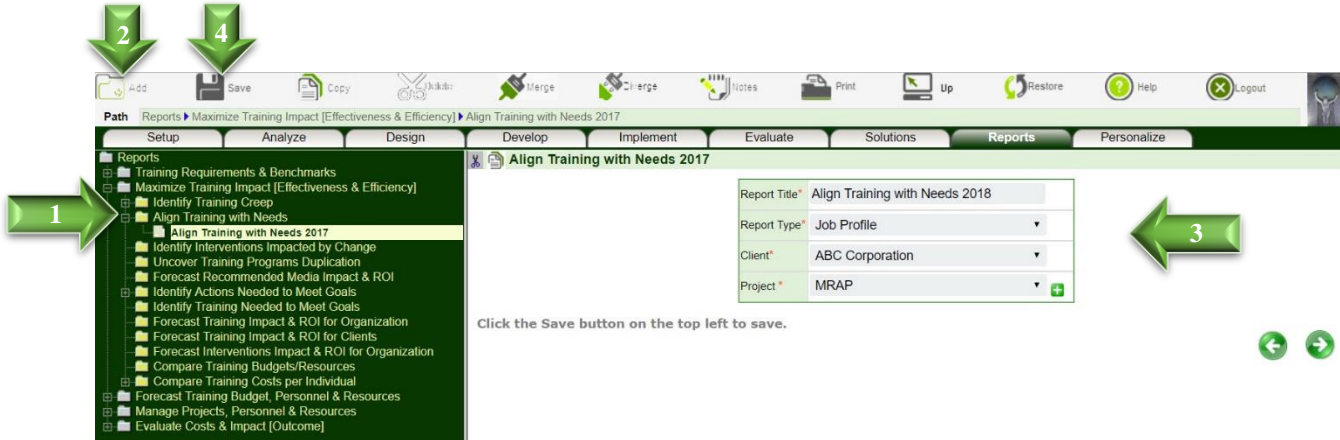
Identifies Training Gaps by mapping operational requirements – i.e., Knowledge, Skills and Attitudes (KSAs) needed to perform each Task and Sub Task to a specific Learning Objective in a Course. To generate:

Step 1: Click on the  **Align Training with Needs** folder.

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

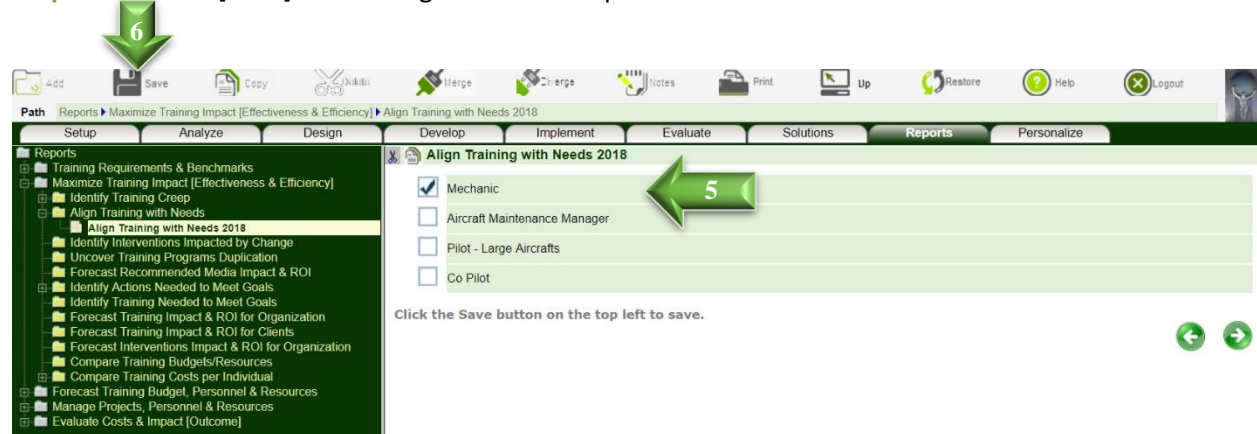
Step 3: Input the Report Title, select By (Mission or Job), the Client and Project that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Step 5: Select Jobs to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



The report is presented in html format, in a new window. You may print or save the report using the corresponding functions in your Browser.

Step 7: You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner).

Step 8: To return to ADVISOR, close the Report window.





[Generate Excel](#)

Align Training with Needs Report

Project: MRAP
 Prepared by: BNH Director
 Date: September 2018

Job	Task	Sub Task	Task Training Requirement	Task Training Priority	Performance Objective	Knowledge/ Skills	Learning Objective	Lesson	Course
Mechanic	Maintain the Leo 2 A4 CAN MBT and ancillary equipment.	Identify Leo 2 A4 CAN exterior components.	Train	High	Identify Leo 2 A4 CAN exterior components.	Safety points related to exterior components.	Describe safety concerns	Lesson 1	Driver MRAP
						Description, characteristics and performance of the Leo 2 A4 CAN MBT.	Description, characteristics and performance of the Leo 2	Lesson 1	Driver MRAP
						Back deck lifting device bracket.	Back deck lifting device bracket.	Lesson 1	Driver MRAP
						Back deck lifting device lower mount with hopper bin.	Back deck lifting device lower mount with hopper bin.	Lesson 1	Driver MRAP
						Cooling air intake grills.	Cooling air intake grills.	Lesson 2	Driver MRAP
						Tow cable mounting brackets.	Tow cable mounting brackets.	Lesson 2	Driver MRAP
						Various mounting bracket for pioneer tools, large track tools, and fuel transfer hose.	KSAs not addressed by specific LO may indicate a gap		
		Operate the main components of the fighting compartment.	Train	High	Operate the main components of the fighting compartment.	Description, servicing and storage of tools.	Describe servicing and storage of tools	Lesson 2	Driver MRAP
						Perform safety procedures on the Leo 2 A4 CAN MBT turret.	Perform safety procedures on the Leo 2 A4 CAN MBT turret.	Lesson 3	Driver MRAP
						Safety during instruction.	Describe safety procedures.	Lesson 3	Driver MRAP
						Turret components left loaders side.	Describe Turret components left loaders side.	Lesson 3	Driver MRAP
		Operate the components of the driver compartment.	Train	High	Operate the components of the driver compartment.	Turret components (roof, front, floor and rear).	Describe Turret components (roof, front, floor and rear).	Lesson 4	Driver MRAP
						Crew commanders hatch.	Describe crew commanders hatch.	Lesson 4	Driver MRAP
		Maintain the lubrication system.	Train	High	Maintain the lubrication system.	Turret components-gunnery station.	Describe Turret components-gunnery station.	Lesson 4	Driver MRAP
						Safety points related to driver compartment.	Describe safety points related to driver compartment.	Lesson 6	Driver MRAP
		Operate the heater and coolant system.	Train	High	Operate the heater and coolant system.	Components of the drivers compartment.	Describe components of the drivers compartment.	Lesson 6	Driver MRAP
						Lubrication system description and components.	Describe lubrication system and components.	Lesson 6	Driver MRAP
		Maintain the fuel system.	Train	High	Maintain the fuel system.	Heater and coolant ancillary equipment operation.	KSAs not addressed by specific LO may indicate a gap		
						Heater and coolant system maintenance.	maintenance requirements.		Driver MRAP
						Operating the heating system.	Operate the heating system to include, starting and switching off the heater.	Lesson 7	Driver MRAP
						Safety points related to fuel system.	Describe safety considerations to fuel system.	Lesson 7	Driver MRAP
						Fuel system components.	Outline fuel system components.	Lesson 7	Driver MRAP
						Fighting compartment.	Describe fighting compartment.	Lesson 8	Driver MRAP
						Hull underside: fuel drain access cover.	Describe the underside of the hull and how to access fuel drain cover.	Lesson 8	Driver MRAP
						Driver compartment.	Describe driver compartment.	Lesson 8	Driver MRAP
						Perform refuelling procedures.	Perform refuelling procedures.	Lesson 8	Driver MRAP
						Fuel system maintenance.	Maintain fuel system.	Lesson 9	Driver MRAP
						Safety points related to electrical system.	KSAs not addressed by specific LO may indicate a gap		

4.4 Identify Interventions Impacted by Change Report

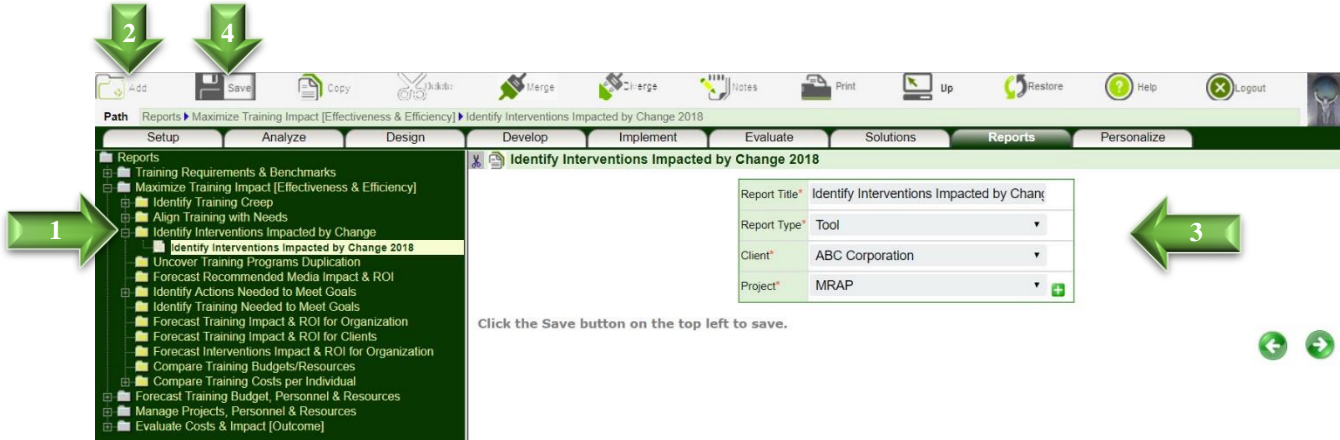
Identifies Jobs, Performance Objectives, Courses, Lessons and Learning Objectives that could be impacted by a change to a Reference, Policy or Tool. To generate:

Step 1: Click on the  **Identify Interventions Impacted by Change** folder.

Step 2: Click on the [Add] button.

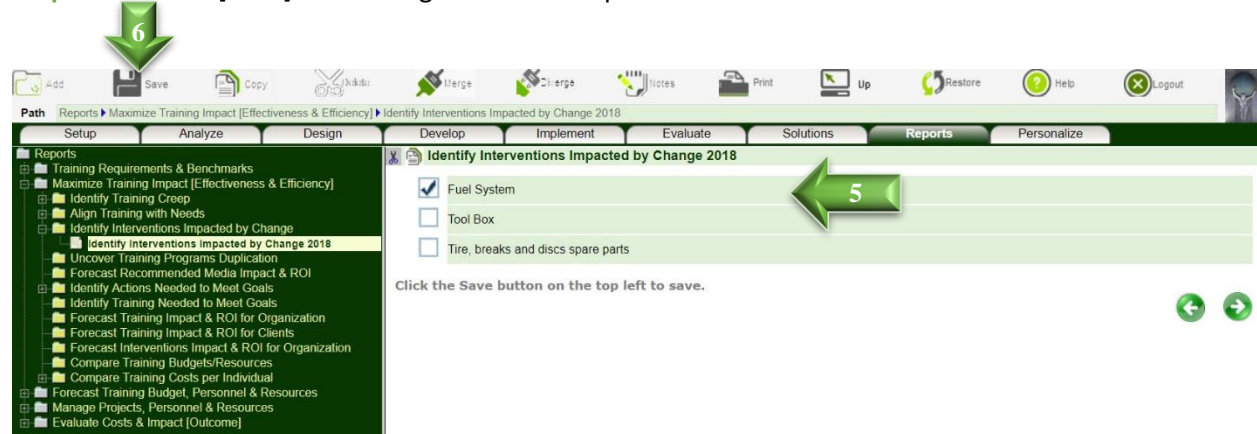
Step 3: Input Report Title, report type (Reference, Policy or Tool), the Client and Project that the report is assigned to.

Step 4: Click [Save] to advance to the next screen.



Step 5: Select Tools to be included in the Report.

Step 6: Click the [Save] button to generate the report.



The report is presented in html format, in a new window. You may print or save the report using the corresponding functions in your Browser.

Step 7: You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner).

Step 8: To return to ADVISOR, close the Report window.



Identify Interventions Impacted by Change Report

Parameters: Report Type: Tool

Prepared by: BNH Director

Date: September 2018

MRAP				
Job Profile	Performance Objective	Course	Lesson	Learning Objectives
Tool: Fuel System				
Driver	Maintain the fuel system.	Driver MRAP	Lesson 7	Components to include: (1) engine components; (2) fuel access covers; (3) fuel filler neck; (4) fuel tanks; (5) fuel header/feeder tank; (6) ventilation and bleeder valves; and (7) drain plug.
			Lesson 8	Driver compartment to include: (1) fuel level warning light; (2) fuel level gauge; (3) fuel gauge selector switch; and (4) accelerator linkage.
			Lesson 8	Fighting compartment to include: (1) fuel pre filter; (2) fuel inlet filter; (3) fuel changeover lever; 4) fuel (pumps; and (5) fuel pump emergency switch.
			Lesson 8	Hull underside: fuel drain access cover.
			Lesson 8	Perform refuelling procedures. Fuel transfer system to include: (1) description; (2) components; (3) preparation; (4) defuelling; and (5) fuelling.
	Maintain the combustion air system.	Driver MRAP	Lesson 9	System maintenance to include: (1) servicing the components; and (2) refuelling. Description of the system and its components to include: (1) description; (2) components: (a) back deck; (b) fighting compartment; and (c) driver compartment. Maintaining the system to include: (1) maintenance; and (2) inspection of the system. Safety equipment (PPE).
			Lesson 9	Safety points (compressed air dangers) to include: (1) when using compressed air, you must be aware that it is very dangerous. If you have any cuts in your skin, compressed air can enter your body system and cause severe risks to health; (2) if compressed air enters the body, it acts the same way as the bends to a diver. at the very least, it will cause agony. at the worst, it will cause death and (3) to prevent these problems, ensure that you always point the nozzle away from your body and never point it in the direction of others.

4.5 Uncover Training Programs Duplication Report

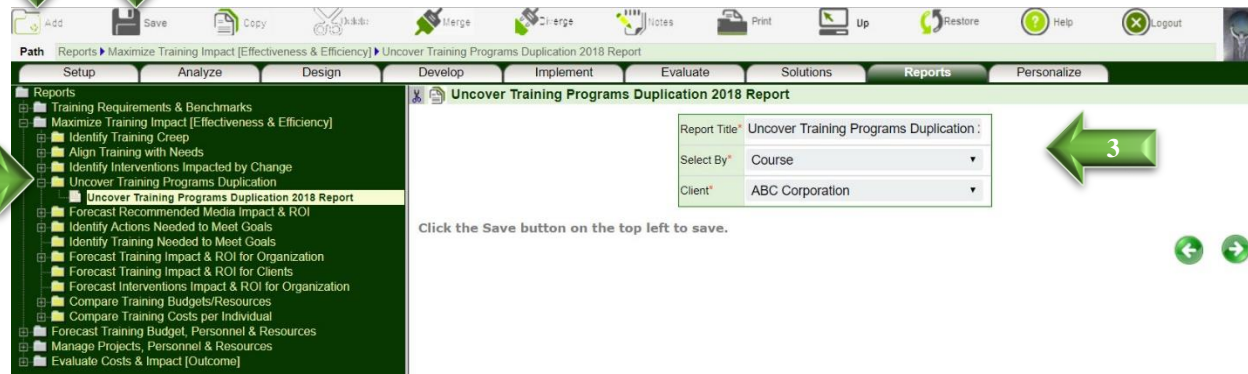
Identifies duplicate Learning Objectives (LOs) within multiple courses by mapping LOs within selected Courses to the Knowledge, Skills and Attitudes (KSAs) that they support. To generate:

Step 1: Click on the  **Uncover Training Programs Duplication** folder.

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

Step 3: Input Report Title, report type (Project, User or Course) and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.

Path: Reports > Maximize Training Impact [Effectiveness & Efficiency] > Uncover Training Programs Duplication 2018 Report

Reports

- Training Requirements & Benchmarks
- Maximize Training Impact [Effectiveness & Efficiency]
 - Identify Training Creep
 - Align Training with Needs
 - Identify Interventions Impacted by Change
 - Uncover Training Programs Duplication
 - Uncover Training Programs Duplication 2018 Report
 - Forecast Recommended Media Impact & ROI
 - Identify Actions Needed to Meet Goals
 - Identify Training Needed to Meet Goals
 - Forecast Training Impact & ROI for Organization
 - Forecast Training Impact & ROI for Clients
 - Forecast Interventions Impact & ROI for Organization
 - Compare Training Budgets/Resources
 - Compare Training Costs per Individual
 - Forecast Training Budget, Personnel & Resources
 - Manage Projects, Personnel & Resources
 - Evaluate Costs & Impact [Outcome]

Uncover Training Programs Duplication 2018 Report

Report Title* Uncover Training Programs Duplication :

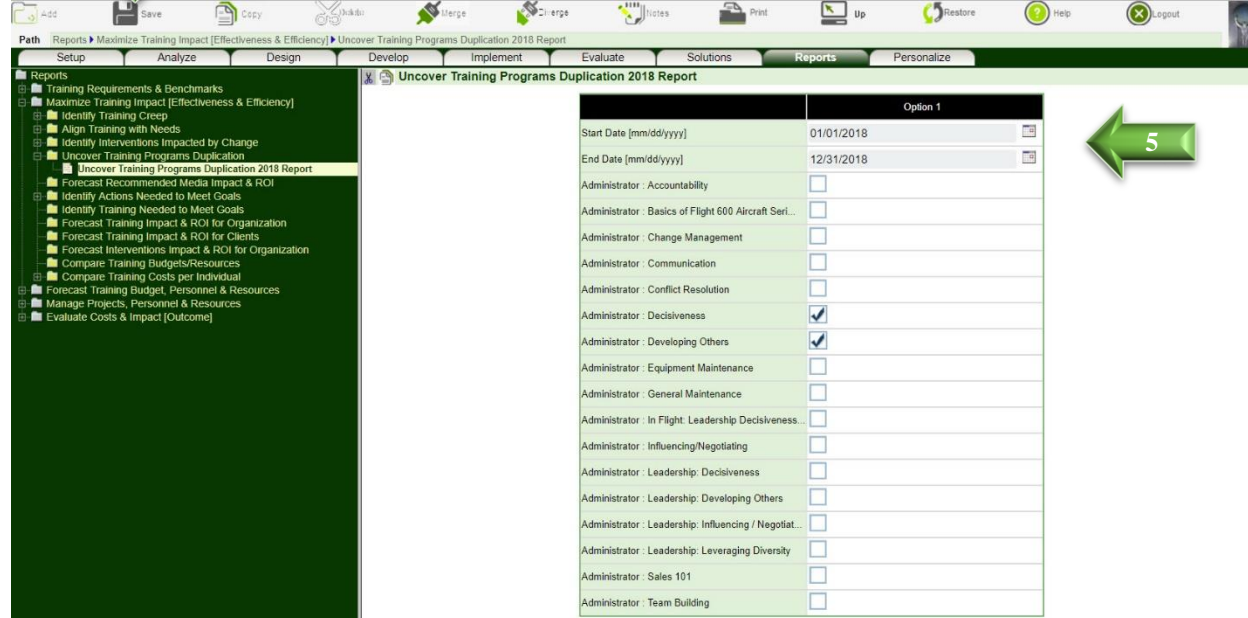
Select By* Course

Client* ABC Corporation

Click the Save button on the top left to save.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.

Path: Reports > Maximize Training Impact [Effectiveness & Efficiency] > Uncover Training Programs Duplication 2018 Report

Reports

- Training Requirements & Benchmarks
- Maximize Training Impact [Effectiveness & Efficiency]
 - Identify Training Creep
 - Align Training with Needs
 - Identify Interventions Impacted by Change
 - Uncover Training Programs Duplication
 - Uncover Training Programs Duplication 2018 Report
 - Forecast Recommended Media Impact & ROI
 - Identify Actions Needed to Meet Goals
 - Identify Training Needed to Meet Goals
 - Forecast Training Impact & ROI for Organization
 - Forecast Training Impact & ROI for Clients
 - Forecast Interventions Impact & ROI for Organization
 - Compare Training Budgets/Resources
 - Compare Training Costs per Individual
 - Forecast Training Budget, Personnel & Resources
 - Manage Projects, Personnel & Resources
 - Evaluate Costs & Impact [Outcome]

Uncover Training Programs Duplication 2018 Report

Start Date [mm/dd/yyyy] 01/01/2018

End Date [mm/dd/yyyy] 12/31/2018

	Option 1
Administrator : Accountability	<input type="checkbox"/>
Administrator : Basics of Flight 600 Aircraft Seri...	<input type="checkbox"/>
Administrator : Change Management	<input type="checkbox"/>
Administrator : Communication	<input type="checkbox"/>
Administrator : Conflict Resolution	<input type="checkbox"/>
Administrator : Decisiveness	<input checked="" type="checkbox"/>
Administrator : Developing Others	<input checked="" type="checkbox"/>
Administrator : Equipment Maintenance	<input type="checkbox"/>
Administrator : General Maintenance	<input type="checkbox"/>
Administrator : In Flight Leadership Decisiveness...	<input type="checkbox"/>
Administrator : Influencing/Negotiating	<input type="checkbox"/>
Administrator : Leadership: Decisiveness	<input type="checkbox"/>
Administrator : Leadership: Developing Others	<input type="checkbox"/>
Administrator : Leadership: Influencing / Negotiat...	<input type="checkbox"/>
Administrator : Leadership: Leveraging Diversity	<input type="checkbox"/>
Administrator : Sales 101	<input type="checkbox"/>
Administrator : Team Building	<input type="checkbox"/>

The report is presented in html format, in a new window. You may print or save the report using the corresponding functions in your Browser.

Step 7: You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner).

Step 8: To return to ADVISOR, close the Report window.





Uncover Training Programs Duplication Report

Prepared by: BNH Director
 Date: September 2018

KSA	Type	Decisiveness Course				Developing Others Course			
		Learning Objective	Length (hrs)	Lesson	Job	Learning Objective	Length (hrs)	Lesson	Job
Describe key elements of a goal	Knowledge	Describe key elements of a goal	1	Lesson 1	Online Managers				
Validate the viability of goals	Knowledge	Validate the viability of goals	1	Lesson 2	Online Managers				
Write clear and concise goals	Knowledge	Write clear and concise goals	1.5	Lesson 2	Online Managers				
Implement incentive system	Knowledge	Implement incentive system	1	Lesson 3	Online Managers				
Measure employees engagement	Knowledge	Measure employees engagement	1	Lesson 3	Online Managers				
Write clear and concise core values	Knowledge	Write clear and concise core values	1	Lesson 4	Online Managers				
Communicate importance of core values	Knowledge	Communicate importance of core values	1	Lesson 4	Online Managers				
Select appropriate venue for prioritizing goals	Knowledge	Select appropriate venue for prioritizing goals	1	Lesson 5	Online Managers				
Prioritize goals	Knowledge	Prioritize goals	1	Lesson 5	Online Managers				
Implement design	Knowledge	Implement design	0.5	Lesson 6	Online Managers				
Describe various implementation procedures	Knowledge	Describe various implementation procedures	0.25	Lesson 6	Online Managers	Describe various implementation procedures	0.25	Lesson 3	Online Managers
Select appropriate implementation procedure	Knowledge	Select appropriate implementation procedure	0.25	Lesson 6	Online Managers	Select appropriate implementation procedure	0.25	Lesson 3	Online Managers
Implement procedures	Knowledge	Implement procedures	0.5	Lesson 6	Online Managers	Implement procedures	0.5	Lesson 3	Online Managers
Describe key steps in project management	Knowledge	Describe key steps in project management	0.25	Lesson 6	Online Managers	Describe key steps in project management	0.25	Lesson 3	Online Managers
Develop project management plan	Knowledge	Develop project management plan	0.5	Lesson 7	Online Managers	Develop project management plan	0.5	Lesson 4	Online Managers
Monitor progress	Knowledge	Monitor progress	0.25	Lesson 6	Online Managers	Monitor progress	0.25	Lesson 4	Online Managers
Describe various conflict resolution procedures	Knowledge	Describe various conflict resolution procedures	0.25	Lesson 7	Online Managers	Describe various conflict resolution procedures	0.25	Lesson 4	Online Managers
Select appropriate procedures	Knowledge	Select appropriate procedures	0.25	Lesson 7	Online Managers	Select appropriate procedures	0.25	Lesson 4	Online Managers
Implement conflict resolution procedures	Knowledge	Implement conflict resolution procedures	0.25	Lesson 7	Online Managers	Implement conflict resolution procedures	0.25	Lesson 5	Online Managers
Validate outcomes	Knowledge	Validate outcomes	0.25	Lesson 7	Online Managers	Validate outcomes	0.25	Lesson 5	Online Managers

The following LOs in the Decisiveness Course & Developing Others Course could be redundant since they support the same KSAs for the same Job.

4.6 Forecast Recommended Media Impact & ROI Report

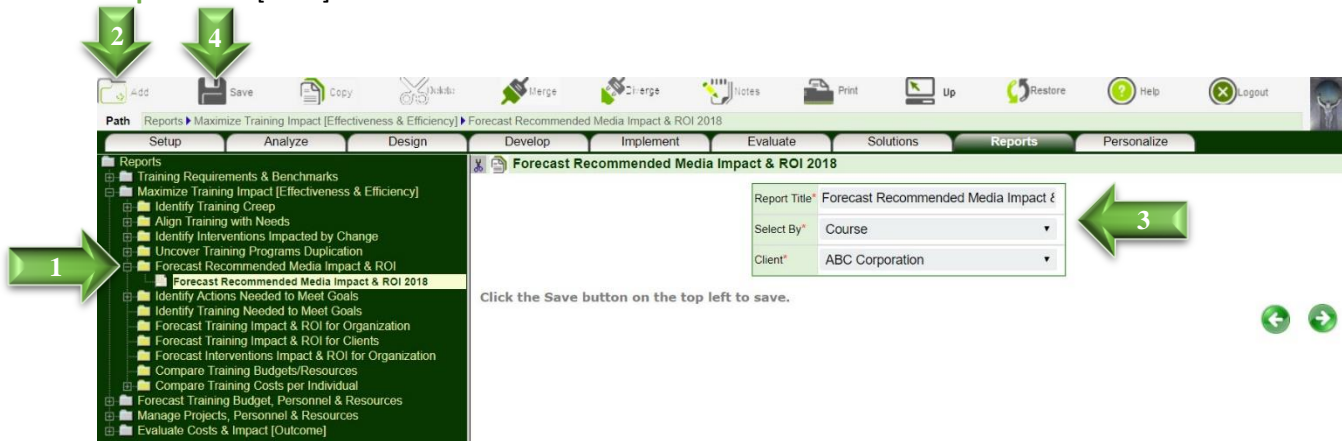
Generates a concise summary of recommended delivery options for multiple Courses and prioritize actions based on anticipated Return on Investment (ROI) – i.e., from highest to lowest. To generate:

Step 1: Click on the  **Forecast Recommended Media Impact & ROI** folder.

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

Step 3: Input Report Title, Select By (Client, User or Course) and the Client that the report is assigned to.

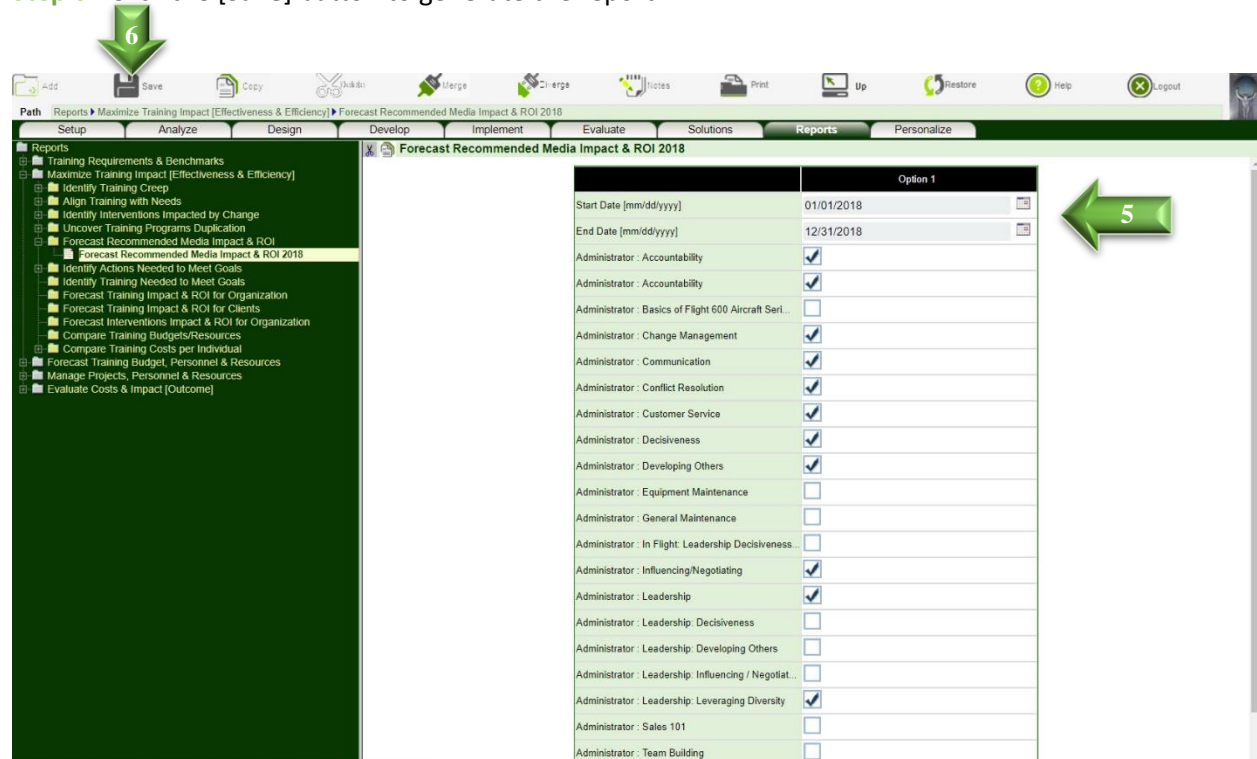
Step 4: Click **[Save]** to advance to the next screen.



Click the Save button on the top left to save.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



	Option 1
Start Date [mm/dd/yyyy]	01/01/2018
End Date [mm/dd/yyyy]	12/31/2018
Administrator : Accountability	<input checked="" type="checkbox"/>
Administrator : Accountability	<input checked="" type="checkbox"/>
Administrator : Basics of Flight 600 Aircraft Seri...	<input type="checkbox"/>
Administrator : Change Management	<input checked="" type="checkbox"/>
Administrator : Communication	<input checked="" type="checkbox"/>
Administrator : Conflict Resolution	<input checked="" type="checkbox"/>
Administrator : Customer Service	<input checked="" type="checkbox"/>
Administrator : Decisiveness	<input checked="" type="checkbox"/>
Administrator : Developing Others	<input checked="" type="checkbox"/>
Administrator : Equipment Maintenance	<input type="checkbox"/>
Administrator : General Maintenance	<input type="checkbox"/>
Administrator : In Flight : Leadership Decisiveness..	<input type="checkbox"/>
Administrator : Influencing/Negotiating	<input checked="" type="checkbox"/>
Administrator : Leadership	<input checked="" type="checkbox"/>
Administrator : Leadership: Decisiveness	<input type="checkbox"/>
Administrator : Leadership: Developing Others	<input type="checkbox"/>
Administrator : Leadership: Influencing / Negotiat.	<input type="checkbox"/>
Administrator : Leadership: Leveraging Diversity	<input checked="" type="checkbox"/>
Administrator : Sales 101	<input type="checkbox"/>
Administrator : Team Building	<input type="checkbox"/>

Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.

Step 8: To return to ADVISOR, close the Report window.



Parameters: Courses
January 01, 2018 to December 31, 2018

Prepared by: BNH Director

Date: September 2018

Analyst Recommendations [Costs over life of course]

Course Title	Direct Costs	Indirect Costs	Total Cost	Delivery Options
Decisiveness	\$0	\$41,751	\$41,751	Webex
Developing Others	\$0	\$27,315	\$27,315	Webex
Accountability	\$0	\$9,319	\$9,319	ILT
Communication	\$0	\$13,699	\$13,699	CBT
Leadership	\$0	\$76,363	\$76,363	Webex
Influencing/Negotiating	\$0	\$23,612	\$23,612	ILT
Conflict Resolution	\$0	\$8,404	\$8,404	ILT
Change Management	\$0	\$8,422	\$8,422	ILT
Customer Service	\$0	\$8,422	\$8,422	ILT
Leveraging Diversity	\$0	\$12,064	\$12,064	ILT
Total:	\$0	\$229,371	\$229,371	

Current Delivery [Costs over life of course]

Course Title	Direct Costs	Indirect Costs	Total Cost	Delivery Options
Decisiveness	\$558,333	\$39,966	\$598,299	ILT
Developing Others	\$212,500	\$28,515	\$241,015	ILT
Accountability	\$0	\$22,294	\$22,294	Webex
Communication	\$0	\$22,941	\$22,941	Webex
Leadership	\$0	\$79,933	\$79,933	ILT
Influencing/Negotiating	\$0	\$23,612	\$23,612	ILT
Conflict Resolution	\$0	\$8,404	\$8,404	ILT
Change Management	\$0	\$8,422	\$8,422	ILT
Customer Service	\$0	\$8,422	\$8,422	ILT
Leveraging Diversity	\$0	\$12,064	\$12,064	ILT
Total:	\$770,833	\$254,573	\$1,025,406	

Potential Savings [over life of course]

Course Title	Direct Saving	Indirect Saving	Total Saving	ROI
Decisiveness	\$558,333	-\$1,785	\$556,548	18.60%
Developing Others	\$212,500	\$1,200	\$213,700	17.73%
Accountability	\$0	\$12,975	\$12,975	11.64%
Communication	\$0	\$9,242	\$9,242	8.06%
Leadership	\$0	\$3,570	\$3,570	0.89%
Influencing/Negotiating	\$0	\$0	\$0	0.00%
Conflict Resolution	\$0	\$0	\$0	0.00%
Change Management	\$0	\$0	\$0	0.00%
Customer Service	\$0	\$0	\$0	0.00%
Leveraging Diversity	\$0	\$0	\$0	0.00%
Total:	\$770,833	\$25,202	\$796,035	

* Course Title Dimmed = Incomplete

* Course Value Dimmed = Course already in progress, impact & ROI may no longer be accurate

4.7 Forecast Training Impact & ROI for Organization Report

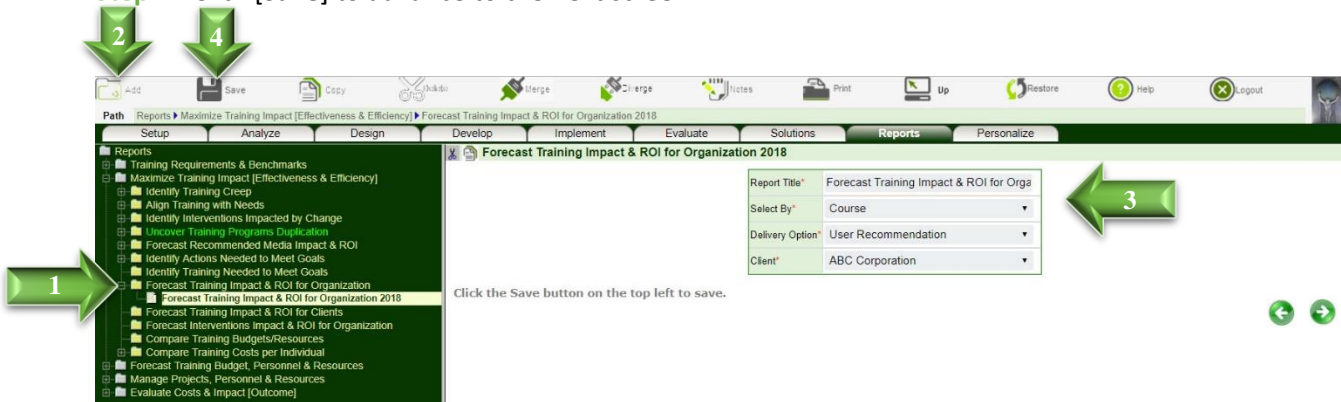
Forecasts the potential Return on Investment (ROI) of Training Courses/Activities by comparing costs to anticipated impact on missions/goals. To generate:

Step 1: Click on the  **Forecast Training Impact & ROI for Organization** folder.

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

Step 3: Input Report Title, Select By (Client, User or Course), whether the report should be presented for “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Path: Reports > Maximize Training Impact (Effectiveness & Efficiency) > Forecast Training Impact & ROI for Organization 2018

Setup Analyze Design Develop Implement Evaluate Solutions Reports Personalize

Reports

- Training Requirements & Benchmarks
- Maximize Training Impact (Effectiveness & Efficiency)
 - Identify Training Creep
 - Align Training with Needs
 - Identify Interventions Impacted by Change
 - Uncover Training Programs Duplication
 - Forecast Recommended Media Impact & ROI
 - Identify Actions Needed to Meet Goals
 - Identify Training Needed to Meet Goals
 - Forecast Training Impact & ROI for Organization**
 - Forecast Training Impact & ROI for Organization 2018
 - Forecast Training Impact & ROI for Clients
 - Forecast Interventions Impact & ROI for Organization
 - Compare Training Budgets/Resources
 - Compare Training Costs per Individual
 - Forecast Training Budget, Personnel & Resources
 - Manage Projects, Personnel & Resources
 - Evaluate Costs & Impact (Outcome)

Forecast Training Impact & ROI for Organization 2018

Report Title* Forecast Training Impact & ROI for Orga

Select By* Course

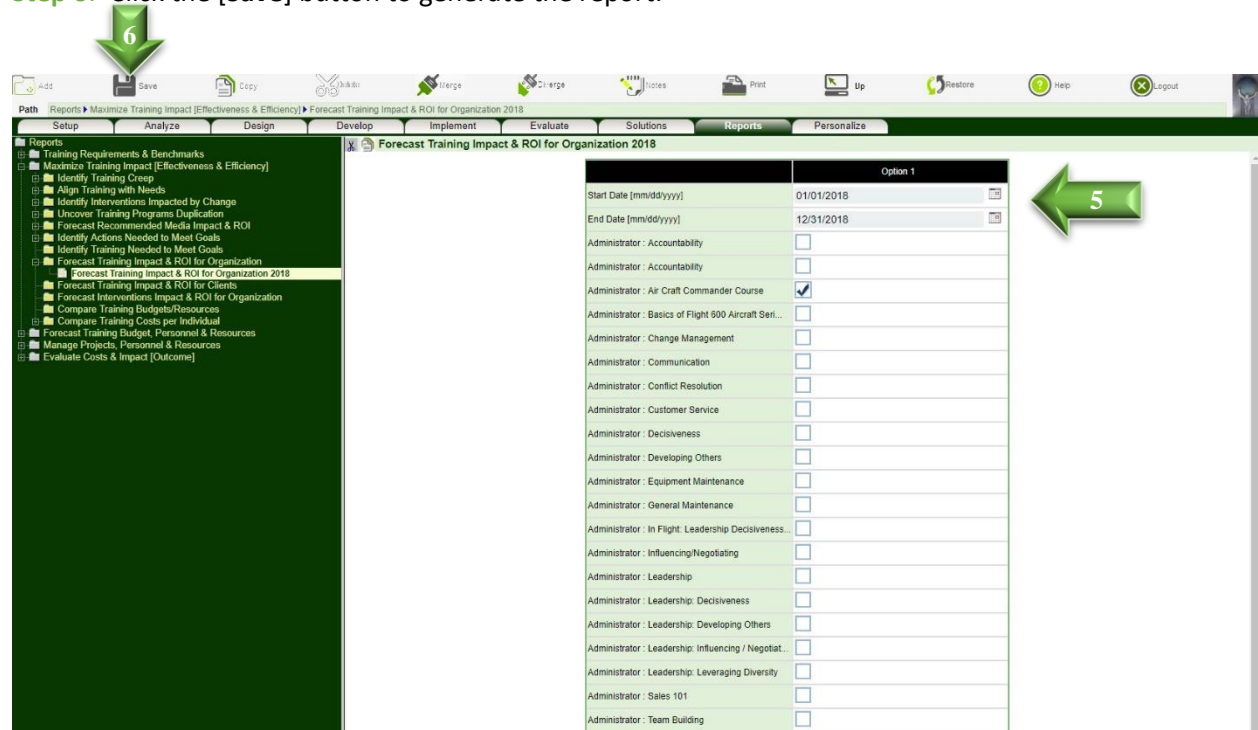
Delivery Option* User Recommendation

Client* ABC Corporation

Click the Save button on the top left to save.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



Path: Reports > Maximize Training Impact (Effectiveness & Efficiency) > Forecast Training Impact & ROI for Organization 2018

Setup Analyze Design Develop Implement Evaluate Solutions Reports Personalize

Reports

- Training Requirements & Benchmarks
- Maximize Training Impact (Effectiveness & Efficiency)
 - Identify Training Creep
 - Align Training with Needs
 - Identify Interventions Impacted by Change
 - Uncover Training Programs Duplication
 - Forecast Recommended Media Impact & ROI
 - Identify Actions Needed to Meet Goals
 - Identify Training Needed to Meet Goals
 - Forecast Training Impact & ROI for Organization**
 - Forecast Training Impact & ROI for Organization 2018
 - Forecast Training Impact & ROI for Clients
 - Forecast Interventions Impact & ROI for Organization
 - Compare Training Budgets/Resources
 - Compare Training Costs per Individual
 - Forecast Training Budget, Personnel & Resources
 - Manage Projects, Personnel & Resources
 - Evaluate Costs & Impact (Outcome)

Forecast Training Impact & ROI for Organization 2018

Option 1

Start Date (mm/dd/yyyy)	End Date (mm/dd/yyyy)
01/01/2018	12/31/2018

Administrator: Accountability ☐

Administrator: Air Craft Commander Course ☒

Administrator: Basics of Flight 900 Aircraft Ser... ☐

Administrator: Change Management ☐

Administrator: Communication ☐

Administrator: Conflict Resolution ☐

Administrator: Customer Service ☐

Administrator: Decisiveness ☐

Administrator: Developing Others ☐

Administrator: Equipment Maintenance ☐

Administrator: General Maintenance ☐

Administrator: In Flight Leadership Decisiveness... ☐

Administrator: Influencing/Negotiating ☐

Administrator: Leadership ☐

Administrator: Leadership: Decisiveness ☐

Administrator: Leadership: Developing Others ☐

Administrator: Leadership: Influencing / Negotiat... ☐

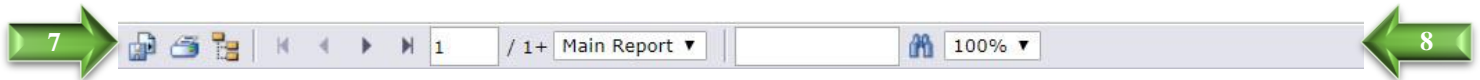
Administrator: Leadership: Leveraging Diversity ☐

Administrator: Sales 101 ☐

Administrator: Team Building ☐

Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.

Step 8: To return to ADVISOR, close the Report window.



Forecast Training Impact & ROI for Organization Report

Parameters: Courses
January 01, 2018 to December 31, 2018

Prepared by: BNH Director

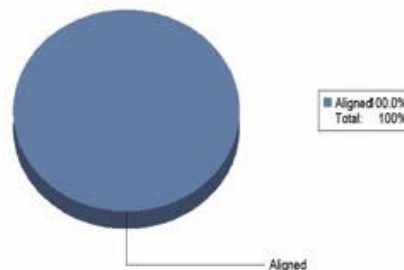
Date: September 2018

Delivery Option: User Recommended

Performance Objective	Job Profile	Mission	Project
Aircraft Commander Course (ROI = 165.11%, Revenue = \$100,000, Impact = \$1,875,000, Cost = \$213,388)			
Verify weight & fuel requirements	Aircraft Commander	Transport Equipment	C130J

* Course Title Dimmed = Incomplete

Alignment



Learning Objective	Length	Performance Objective
Aircraft Commander Course (ROI = 165.11%, Revenue = \$100,000, Impact = \$1,875,000, Cost = \$213,388)		
Verify weight & fuel requirements	8.00	Verify weight & fuel requirements

4.8 Compare Training Budgets/Resources Report

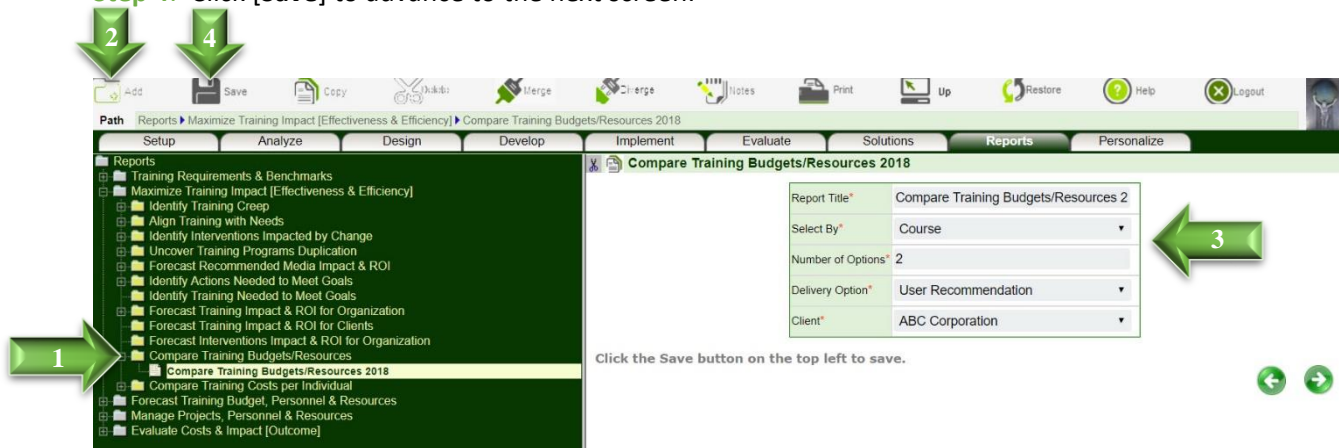
Forecasts and compares out of pocket expenses, as well as personnel and resources required to develop, deliver, administer, manage and maintain training programs within a specific time period. To generate:

Step 1: Click on the  **Compare Training Budgets/Resources** folder.

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

Step 3: Input Report Title, Select By (Client, User or Course), Number of Options to Compare (maximum 4), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Path: Reports > Maximize Training Impact [Effectiveness & Efficiency] > Compare Training Budgets/Resources 2018

Setup Analyze Design Develop Implement Evaluate Solutions Reports Personalize

Reports

- Training Requirements & Benchmarks
- Maximize Training Impact [Effectiveness & Efficiency]
 - Identify Training Creep
 - Align Training with Needs
 - Identify Interventions Impacted by Change
 - Uncover Training Programs Duplication
 - Forecast Recommended Media Impact & ROI
 - Identify Actions Needed to Meet Goals
 - Identify Training Needed to Meet Goals
 - Forecast Training Impact & ROI for Organization
 - Forecast Training Impact & ROI for Clients
 - Forecast Interventions Impact & ROI for Organization
 - Compare Training Budgets/Resources**
 - Compare Training Budgets/Resources 2018
 - Compare Training Costs per Individual
 - Forecast Training Budget, Personnel & Resources
 - Manage Projects, Personnel & Resources
 - Evaluate Costs & Impact [Outcome]

Compare Training Budgets/Resources 2018

Report Title* Compare Training Budgets/Resources 2

Select By* Course

Number of Options* 2

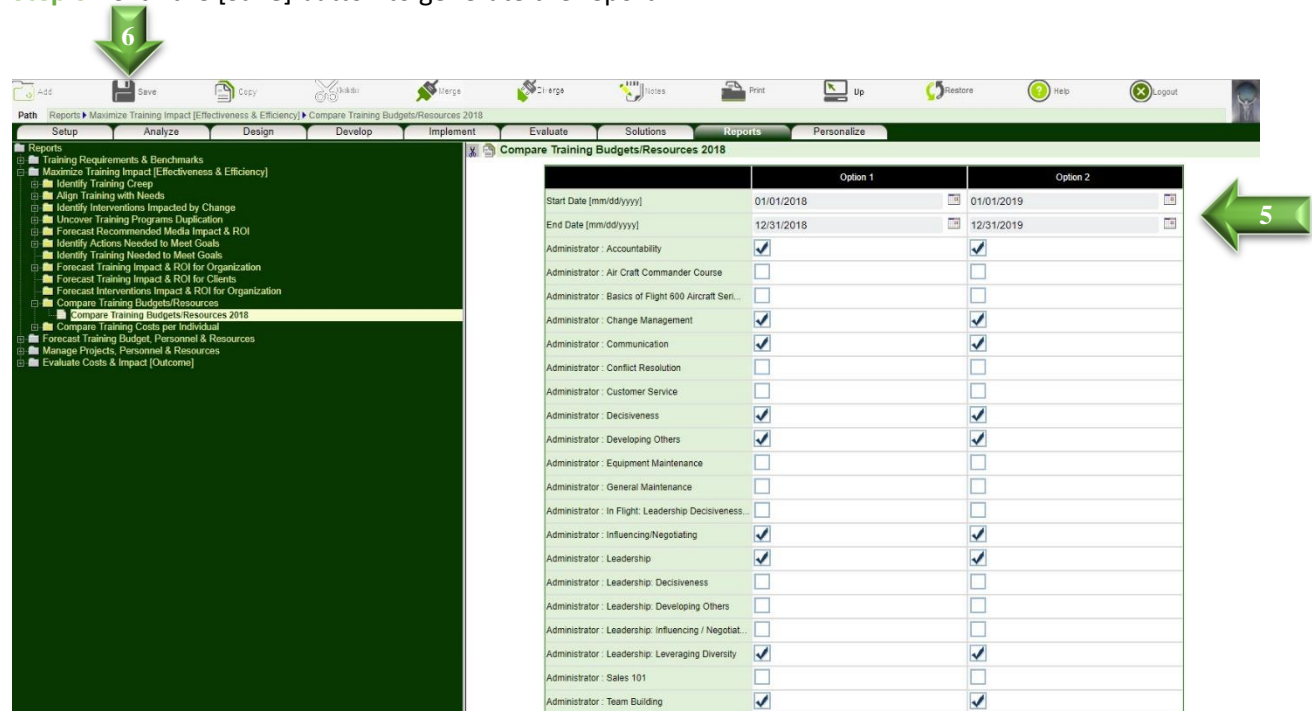
Delivery Option* User Recommendation

Client* ABC Corporation

Click the Save button on the top left to save.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



Path: Reports > Maximize Training Impact [Effectiveness & Efficiency] > Compare Training Budgets/Resources 2018

Setup Analyze Design Develop Implement Evaluate Solutions Reports Personalize

Compare Training Budgets/Resources 2018

Start Date [mm/dd/yyyy] 01/01/2018

End Date [mm/dd/yyyy] 12/31/2018

	Option 1	Option 2
Administrator : Accountability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator : Air Craft Commander Course	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : Basics of Flight 600 Aircraft Ser...	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : Change Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator : Communication	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator : Conflict Resolution	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : Customer Service	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : Decisiveness	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator : Developing Others	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator : Equipment Maintenance	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : General Maintenance	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : In Flight : Leadership Decisiveness...	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : Influencing/Negotiating	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator : Leadership	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator : Leadership: Decisiveness	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : Leadership: Developing Others	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : Leadership: Influencing / Negotiat...	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : Leadership: Leveraging Diversity	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Administrator : Sales 101	<input type="checkbox"/>	<input type="checkbox"/>
Administrator : Team Building	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.

Step 8: To return to ADVISOR, close the Report window.



Compare Training Budgets/Resources Report

Prepared by: BNH Director
Date: September 2018
Delivery Option: User Recommended

Direct & Indirect Start-up Costs

	Option 1	Option 2
Development Costs	\$156,750	\$0
Hardware Costs	\$2,183,333	\$0
Hidden Costs	\$0	\$0
Total Costs	\$2,340,083	\$0

Direct & Indirect Recurring Costs

	Option 1	Option 2
Administrative Costs	\$0	\$0
Management Costs	\$0	\$0
Trainee Costs	\$168,152	\$201,782
Instructor Costs	\$140,305	\$160,340
Facility Costs	\$7,150	\$8,173
Transmission Costs	\$0	\$0
Maintenance Costs	\$0	\$0
Support Costs	\$777	\$933
Total Costs	\$316,384	\$371,227

Direct & Indirect Start-up Costs per Hour

	Option 1	Option 2
Development Costs	\$16,060	\$0
Hardware Costs	\$45,868	\$0
Hidden Costs	\$0	\$0
Total Costs	\$61,928	\$0

Direct & Indirect Recurring Costs per Hour

	Option 1	Option 2
Administrative Costs	\$0	\$0
Management Costs	\$0	\$0
Trainee Costs	\$3,533	\$4,239
Instructor Costs	\$8,063	\$8,484
Facility Costs	\$530	\$552
Transmission Costs	\$0	\$0
Maintenance Costs	\$0	\$0
Support Costs	\$16	\$20
Total Costs	\$12,142	\$13,295

Option1 (January 01, 2018 to December 31, 2018)

Course Title	Training Division	Manager	Start Date (Year)	Currency
Accountability	Operations	BNH Director	2018	US Dollar
Change Management	Operations	BNH Director	2018	US Dollar
Communication	Operations	BNH Director	2018	US Dollar
Decisiveness	Operations	BNH Director	2018	US Dollar
Developing Others	Operations	BNH Director	2018	US Dollar
Influencing/Negotiating	Operations	BNH Director	2018	US Dollar
Leveraging Diversity	Operations	BNH Director	2018	US Dollar
Leadership	Operations	BNH Director	2018	US Dollar
Team Building	Operations	BNH Director	2018	US Dollar

Option2 (January 01, 2019 to December 31, 2019)

Course Title	Training Division	Manager	Start Date (Year)	Currency
Accountability	Operations	BNH Director	2019	US Dollar
Change Management	Operations	BNH Director	2019	US Dollar
Communication	Operations	BNH Director	2019	US Dollar
Decisiveness	Operations	BNH Director	2019	US Dollar
Developing Others	Operations	BNH Director	2019	US Dollar
Influencing/Negotiating	Operations	BNH Director	2019	US Dollar
Leveraging Diversity	Operations	BNH Director	2019	US Dollar
Leadership	Operations	BNH Director	2019	US Dollar
Team Building	Operations	BNH Director	2019	US Dollar

* Course Title Dimmed = Incomplete

4.9 Compare Training Costs per Individual Report

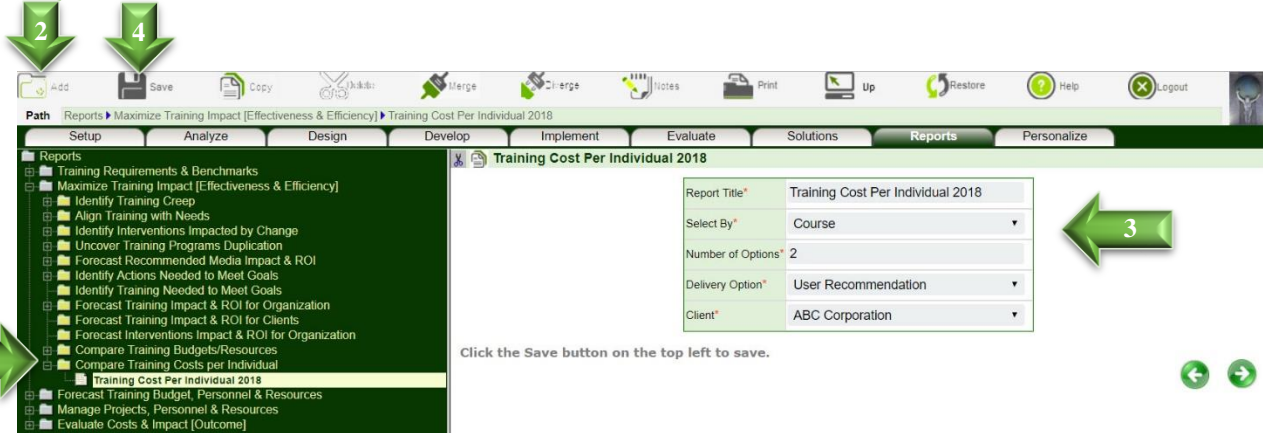
Identifies centers of excellence as well as problem areas by forecasting and comparing direct and indirect costs needed to develop specific skills/competencies within a specific time period. To generate:

Step 1: Click on the  **Compare Training Costs per Individual** folder.

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

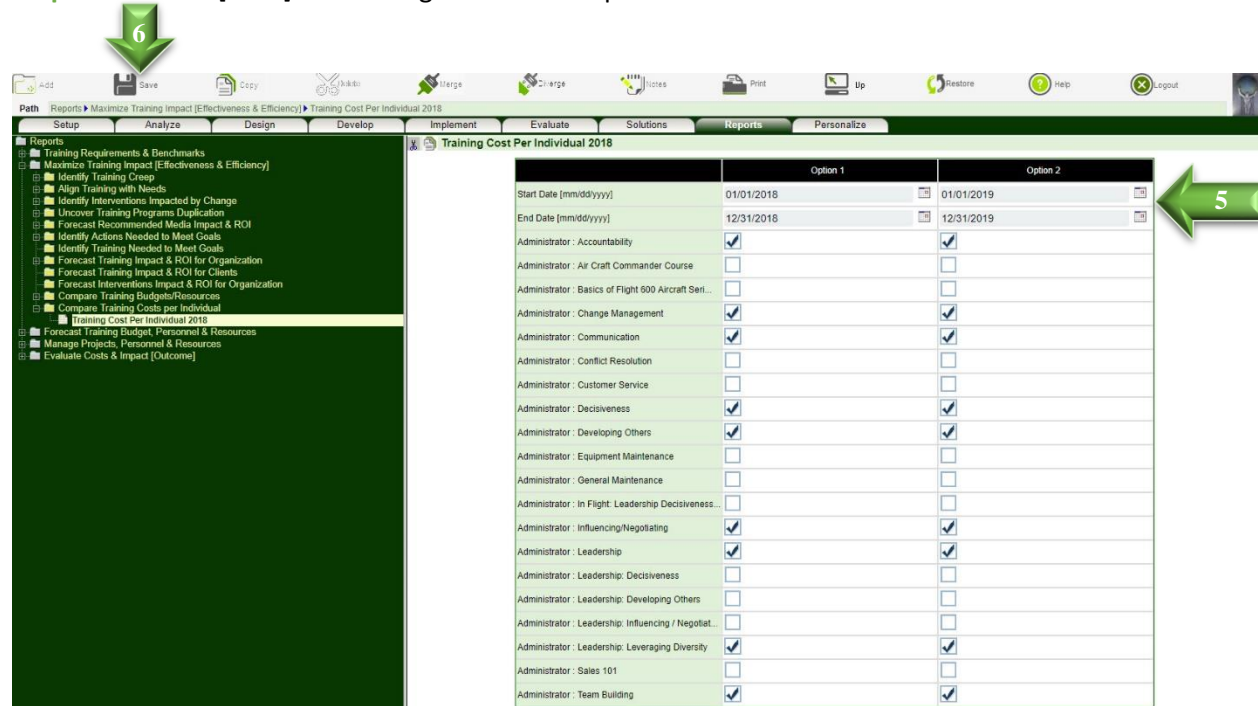
Step 3: Input Report Title, Select By (Client, User or Course), Number of Options to Compare (maximum 4), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Options, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



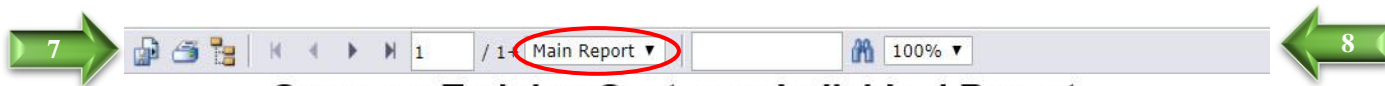
Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.

Step 8: To return to ADVISOR, close the Report window.



Compare Training Costs per Individual Report

Prepared by: BNH Director
Date: September 2018
Delivery Option: User Recommended

	Costs per Trainee	
	Option 1	Option 2
Direct Cost per Trainee	\$3,547	\$3,547
Indirect Cost per Trainee	\$3,642	\$3,642
Total Cost per Trainee	\$7,189	\$7,189

Courses Analyzed

Option 1 (January 01, 2018 to December 31, 2018)

Course Title	Training Division	Manager	Start Date (Year)	Currency
Accountability	Operations	BNH Director	2018	US Dollar
Change Management	Operations	BNH Director	2018	US Dollar
Communication	Operations	BNH Director	2018	US Dollar
Decisiveness	Operations	BNH Director	2018	US Dollar
Developing Others	Operations	BNH Director	2018	US Dollar
Influencing/Negotiating	Operations	BNH Director	2018	US Dollar
Leveraging Diversity	Operations	BNH Director	2018	US Dollar
Leadership	Operations	BNH Director	2018	US Dollar
Team Building	Operations	BNH Director	2018	US Dollar

Option 2 (January 01, 2019 to December 31, 2019)

Course Title	Training Division	Manager	Start Date (Year)	Currency
Accountability	Operations	BNH Director	2019	US Dollar
Change Management	Operations	BNH Director	2019	US Dollar
Communication	Operations	BNH Director	2019	US Dollar
Decisiveness	Operations	BNH Director	2019	US Dollar
Developing Others	Operations	BNH Director	2019	US Dollar
Influencing/Negotiating	Operations	BNH Director	2019	US Dollar
Leveraging Diversity	Operations	BNH Director	2019	US Dollar
Leadership	Operations	BNH Director	2019	US Dollar
Team Building	Operations	BNH Director	2019	US Dollar


* Course Title Dimmed = Incomplete

Note:

- Each option in the report is hyperlinked. If you click the link, a new page will be displayed with the breakdown of direct and indirect costs of each course within that option. To return to the main report, use the drop down (circled in red) and select main report.

Chapter 5: Forecast Training Budget, Personnel & Resources

5.1 Overview

Uncovers cost drivers and improves resource allocation. For example, identifies: how much money, personnel and resources are needed for each course and in total; what type of resources, personnel and skills are required, available or in short supply; the impact of changes to throughput, course length and delivery method on budget, personnel and resources; and so forth. The reports can be accessed under the  **Forecast Training Budget, Personnel & Resources** folder under the **[Reports]** tab. Brief description of key reports is presented below.

5.2 Forecast Training Budget Report

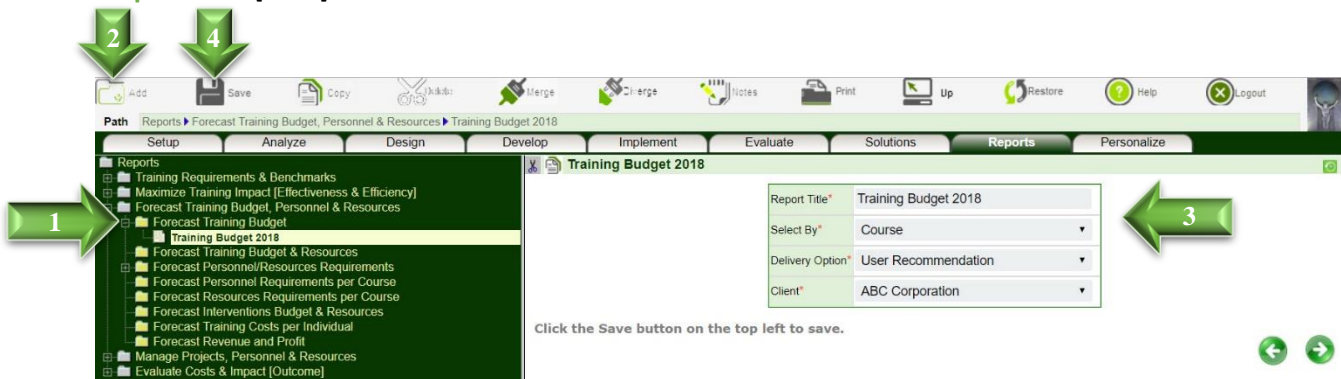
Forecasts the total direct and indirect costs needed to develop, deliver, administer, manage, maintain and support Training Courses/Activities over a specific time period; as well as breakdown of costs per year. To generate:

Step 1: Click  next to  **Forecast Training Budget, Personnel & Resources** folder and click on the  **Forecast Training Budget** folder.

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

Step 3: Input the Report Title, select By (Client, User, Course), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.

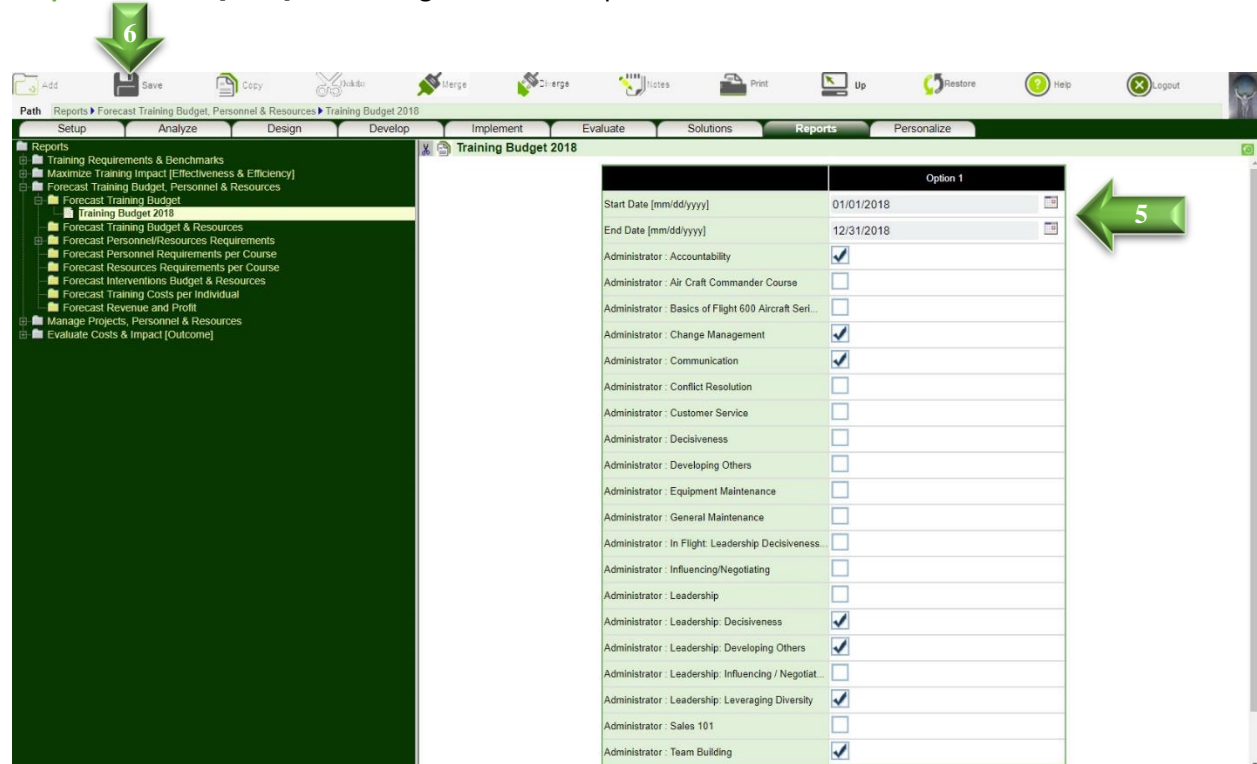


The screenshot shows the software interface with the following elements:

- Path:** Reports > Forecast Training Budget, Personnel & Resources > Training Budget 2018
- Navigation Tabs:** Setup, Analyze, Design, Develop, Implement, Evaluate, Solutions, Reports, Personalize
- Left Panel (Reports):**
 - Training Requirements & Benchmarks
 - Maximize Training Impact [Effectiveness & Efficiency]
 - Forecast Training Budget, Personnel & Resources
 - Forecast Training Budget
 - Training Budget 2018
 - Forecast Training Budget & Resources
 - Forecast Personnel/Resources Requirements
 - Forecast Personnel Requirements per Course
 - Forecast Resources Requirements per Course
 - Forecast Interventions Budget & Resources
 - Forecast Training Costs per Individual
 - Forecast Revenue and Profit
 - Manage Projects, Personnel & Resources
 - Evaluate Costs & Impact [Outcome]
- Right Panel (Training Budget 2018):**
 - Report Title*: Training Budget 2018
 - Select By*: Course
 - Delivery Option*: User Recommendation
 - Client*: ABC Corporation
- Buttons:** Add, Save, Copy, Paste, Merge, Change, Notes, Print, Up, Restore, Help, Logout
- Instructions:** Click the Save button on the top left to save.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the [Save] button to generate the report.



Path: Reports > Forecast Training Budget, Personnel & Resources > Training Budget 2018

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

Reports

- Training Requirements & Benchmarks
 - Maximize Training Impact [Effectiveness & Efficiency]
 - Forecast Training Budget, Personnel & Resources
 - Forecast Training Budget
 - Training Budget 2018
 - Forecast Training Budget & Resources
 - Forecast Personnel/Resources Requirements
 - Forecast Personnel Requirements per Course
 - Forecast Resources Requirements per Course
 - Forecast Interventions Budget & Resources
 - Forecast Training Costs per Individual
 - Forecast Revenue and Profit
 - Manage Projects, Personnel & Resources
 - Evaluate Costs & Impact [Outcome]

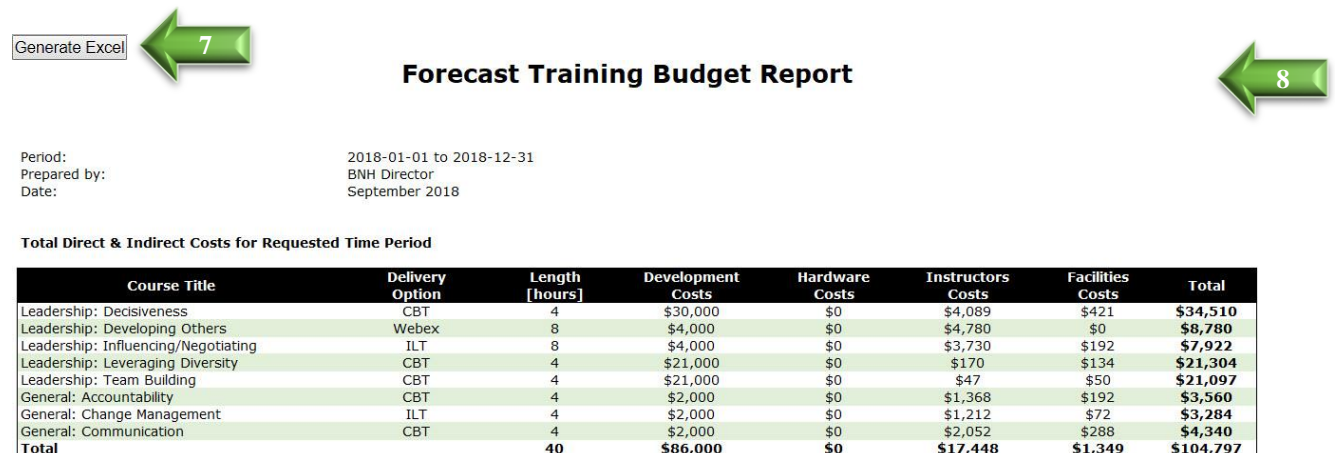
Training Budget 2018

	Option 1
Start Date [mm/dd/yyyy]	01/01/2018
End Date [mm/dd/yyyy]	12/31/2018
Administrator : Accountability	<input checked="" type="checkbox"/>
Administrator : Air Craft Commander Course	<input type="checkbox"/>
Administrator : Basics of Flight 600 Aircraft Ser...	<input type="checkbox"/>
Administrator : Change Management	<input checked="" type="checkbox"/>
Administrator : Communication	<input checked="" type="checkbox"/>
Administrator : Conflict Resolution	<input type="checkbox"/>
Administrator : Customer Service	<input type="checkbox"/>
Administrator : Decisiveness	<input type="checkbox"/>
Administrator : Developing Others	<input type="checkbox"/>
Administrator : Equipment Maintenance	<input type="checkbox"/>
Administrator : General Maintenance	<input type="checkbox"/>
Administrator : In Flight Leadership Decisiveness...	<input type="checkbox"/>
Administrator : Influencing/Negotiating	<input type="checkbox"/>
Administrator : Leadership	<input type="checkbox"/>
Administrator : Leadership: Decisiveness	<input checked="" type="checkbox"/>
Administrator : Leadership: Developing Others	<input checked="" type="checkbox"/>
Administrator : Leadership: Influencing / Negotiat...	<input type="checkbox"/>
Administrator : Leadership: Leveraging Diversity	<input checked="" type="checkbox"/>
Administrator : Sales 101	<input type="checkbox"/>
Administrator : Team Building	<input checked="" type="checkbox"/>

The report is presented in html format, in a new window.

Step 7: You may export the report to Excel by clicking on the [Generate Excel] button (top left corner).

Step 8: To return to ADVISOR, close the Report window.



Generate Excel

Forecast Training Budget Report

Period: 2018-01-01 to 2018-12-31
 Prepared by: BNH Director
 Date: September 2018

Total Direct & Indirect Costs for Requested Time Period

Course Title	Delivery Option	Length [hours]	Development Costs	Hardware Costs	Instructors Costs	Facilities Costs	Total
Leadership: Decisiveness	CBT	4	\$30,000	\$0	\$4,089	\$421	\$34,510
Leadership: Developing Others	Webex	8	\$4,000	\$0	\$4,780	\$0	\$8,780
Leadership: Influencing/Negotiating	ILT	8	\$4,000	\$0	\$3,730	\$192	\$7,922
Leadership: Leveraging Diversity	CBT	4	\$21,000	\$0	\$170	\$134	\$21,304
Leadership: Team Building	CBT	4	\$21,000	\$0	\$47	\$50	\$21,097
General: Accountability	CBT	4	\$2,000	\$0	\$1,368	\$192	\$3,560
General: Change Management	ILT	4	\$2,000	\$0	\$1,212	\$72	\$3,284
General: Communication	CBT	4	\$2,000	\$0	\$2,052	\$288	\$4,340
Total		40	\$86,000	\$0	\$17,448	\$1,349	\$104,797

5.3 Forecast Training Budget & Resources Report

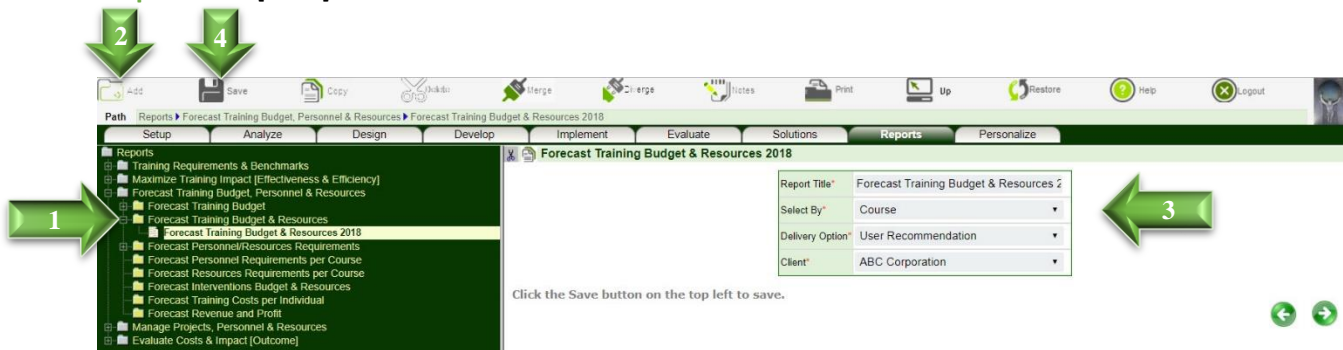
Forecasts out of pocket expenses as well as personnel and resources needed to develop, deliver, administer, manage, maintain and support Training Courses/Activities over a specific time period. To generate:

Step 1: Click on the  **Forecast Training Budget & Resources** folder.

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

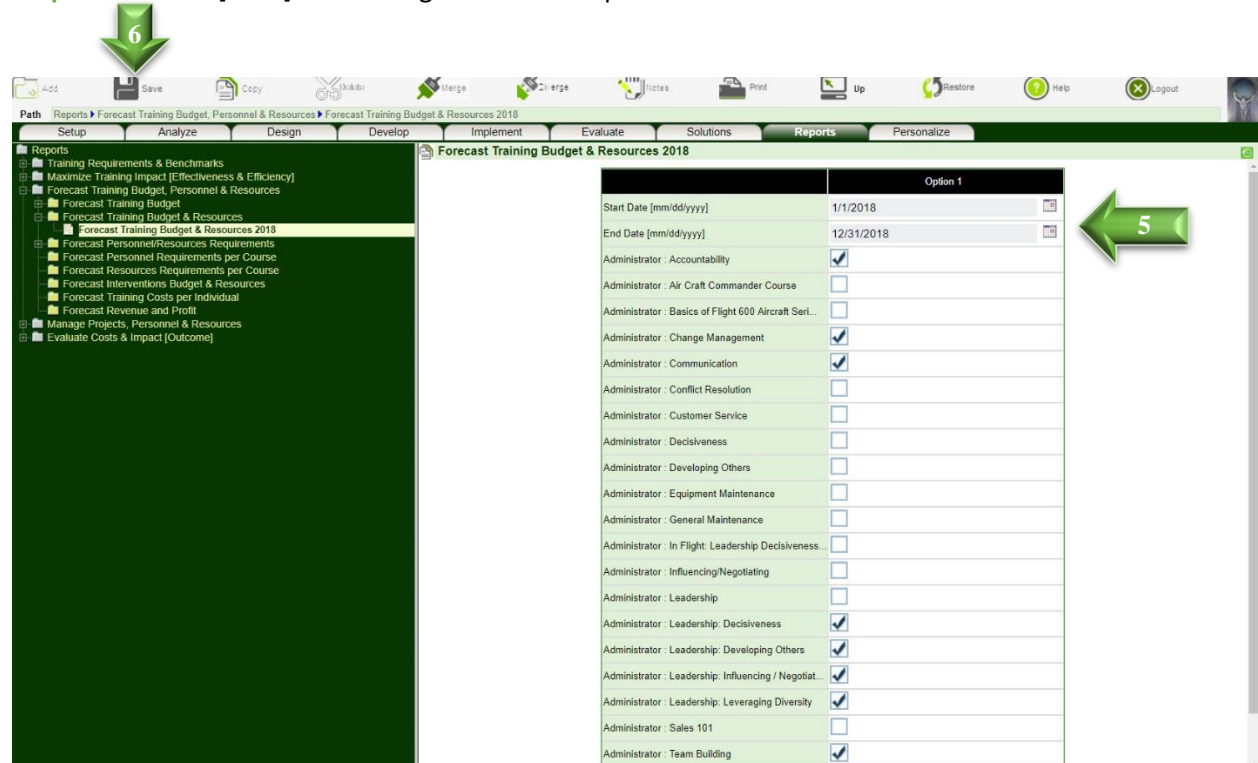
Step 3: Input the Report Title, select By (Client, User, Course), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report should be assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.



Forecast Training Budget & Resources Report

Parameters: Courses
January 01, 2018 to December 31, 2018

Prepared by: BNH Director

Date: September 2018

Delivery Option: User Recommended

Course Title	Course Length (hours)	# of Trainees
Decisiveness	14.00	200
Developing Others	8.00	75
Influencing/Negotiating	8.00	60
Team Building	4.00	30
Leveraging Diversity	4.00	40
Accountability	4.00	80
Change Management	4.00	60
Communication	4.00	120
Total:	50.00	665

Direct Start-up Costs

Course Title	Media	Development Costs	Hardware Costs	Hidden Costs	Subtotal
Decisiveness	Webex	\$0	\$0	\$0	\$0
Developing Others	Webex	\$0	\$0	\$0	\$0
Influencing/Negotiating	ILT	\$0	\$0	\$0	\$0
Team Building	ILT	\$0	\$0	\$0	\$0
Leveraging Diversity	CBT	\$0	\$0	\$0	\$0
Accountability	ILT	\$0	\$0	\$0	\$0
Change Management	ILT	\$0	\$0	\$0	\$0
Communication	CBT	\$0	\$0	\$0	\$0
Total:		\$0	\$0	\$0	\$0

Step 8: Click on the [Next] button to advance to the next page of the report.

Step 9: To return to ADVISOR, close the Report window.










Direct Recurring Costs

Course Title	Administrative Costs	Management Costs	Trainee Costs	Instructor Costs	Facility Costs	Transmission Costs	Maintenance Costs	Support Costs	Subtotal
Decisiveness	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Developing Others	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Influencing/Negotiating	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Team Building	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Leveraging Diversity	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Accountability	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Change Management	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Communication	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total:	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Start-up Resources (Indirect Costs)

Course Title	Start-up Development [person days]	Start-up Support Staff [person days]	Start-up Admin Staff [person days]	Course [copies required]	Hardware [units required]
Decisiveness	16	0	0	0	0
Developing Others	10	0	0	0	0
Influencing/Negotiating	10	0	0	0	0
Team Building	5	0	0	0	0
Leveraging Diversity	5	0	0	0	0
Accountability	5	0	0	0	0
Change Management	5	0	0	0	0
Communication	5	0	0	0	0
Total:	61	0	0	0	0

Notes:

- Title of Courses dimmed. This implies that corresponding Course costs and resources may not be accurate – i.e., Course should be recomputed. This may occur if data within the Course such as the number of trainees, length of Learning Objectives, salary of instructors, etc., has been modified; or the attributes of the Client the Course belongs to has been changed such as inflation rate, currency, etc.
- To re-compute Course costs, click on the [Design] tab; click  next to  **Course Analysis** folder to expand; click  next to the  **(course title)** you want to reassess; click  next to the  **Course Summary** folder and click on the  **User Recommendation** node. Recommend an option (if blank), place checkmark next to the reassess field and click the [Save] button. The checkmark will be removed once the course is recomputed.

5.4 Forecast Personnel/Resources Requirements Report

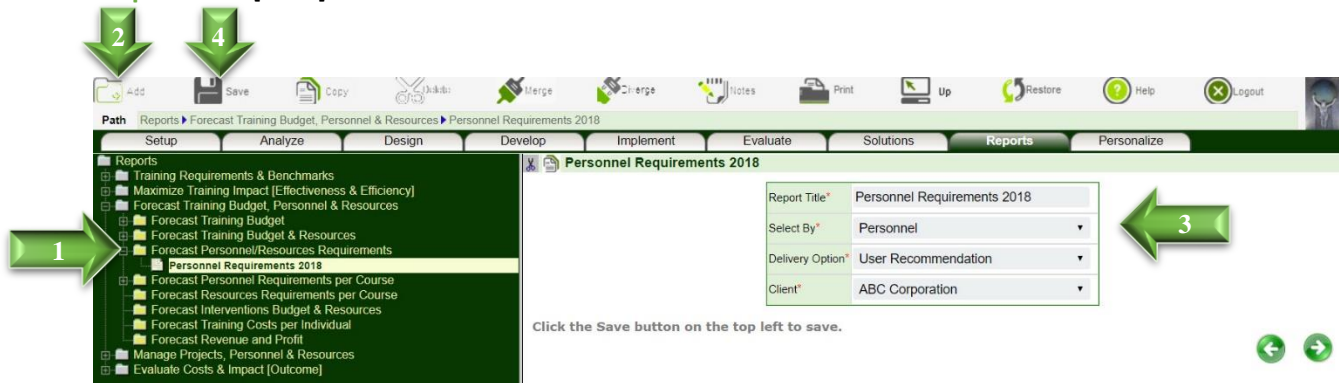
Forecasts the type and number of personnel, classrooms, facilities and equipment needed to develop, deliver, administer, manage, maintain and support Training Courses/Activities over a specific time period. To generate:

Step 1: Click on the **Forecast Personnel/Resources Requirements** folder.

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

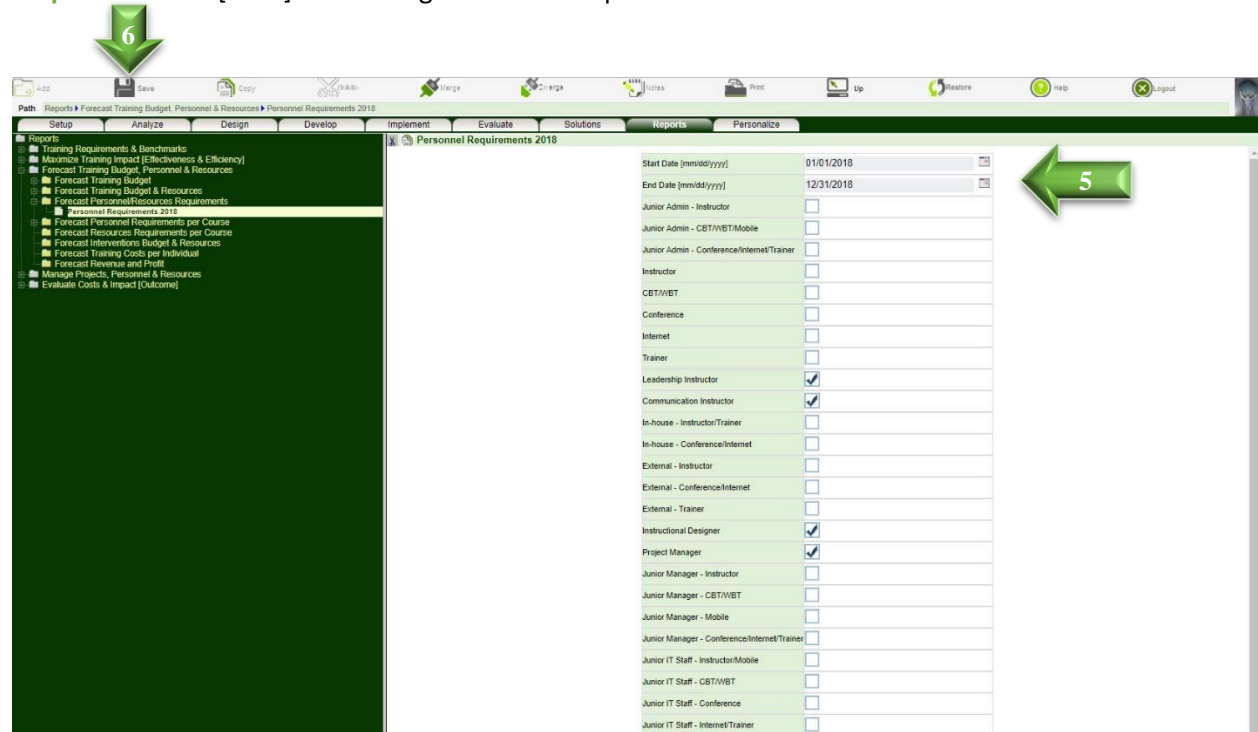
Step 3: Input Report Title, select By (Personnel, Resources, Client), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Step 5: Specify the time period, i.e., the Start and End Dates, and select Personnel to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



The report is presented in html format, in a new window.

Step 7: You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner).

Step 8: To return to ADVISOR, close the Report window.



Forecast Personnel Requirements Report

Includes Direct & Indirect Costs for Recommended Delivery Option

Period: Jan 1, 2018 to Dec 31, 2018
 Prepared by: BNH Director
 Date: September 2018

Personnel	Time [hours]	Utilization Rate	Required #
Instructional Designer	1290	70.11%	0.71
Leadership Instructor	549	29.83%	0.3
Communication Instructor	43	2.34%	0.02
Project Manager	496	26.96%	0.27

Instructional Designer

Course	Group Title	Delivery Option	Time [hours]	Utilization Rate	Required #
Decisiveness Intro	Knowledge	ILT	140	7.61%	0.08
Decisiveness Advanced	Knowledge	Webex	70	3.80%	0.04
Developing Others	Knowledge	Webex	80	4.35%	0.04
Influencing/Negotiating	Knowledge	ILT	80	4.35%	0.04
Leveraging Diversity Intro	Knowledge	CBT	112	6.09%	0.06
Leveraging Diversity Advanced	Knowledge	CBT	140	7.61%	0.08
Team Building Intro	Knowledge	ILT	40	2.17%	0.02
Team Building Advanced	Knowledge	ILT	40	2.17%	0.02
Accountability Intro	Knowledge	Webex	28	1.52%	0.02
Accountability Advanced	Knowledge	CBT	112	6.09%	0.06
Change Management Intro	Knowledge	Webex	28	1.52%	0.02
Change Management Advanced	Knowledge	CBT	112	6.09%	0.06
Communication Intro	Knowledge	CBT	280	15.22%	0.15
Communication Advanced	Knowledge	CBT	28	1.52%	0.02
Total			1290	70.11%	0.71

Leadership Instructor

Course	Group Title	Delivery Option	Time [hours]	Utilization Rate	Required #
Decisiveness Intro	Knowledge	ILT	261	14.18%	0.14
Decisiveness Advanced	Knowledge	Webex	130	7.07%	0.07
Developing Others	Knowledge	Webex	88	4.78%	0.05
Influencing/Negotiating	Knowledge	ILT	70	3.80%	0.04
Total			549	29.83%	0.3

Communication Instructor

Course	Group Title	Delivery Option	Time [hours]	Utilization Rate	Required #
Accountability Intro	Knowledge	Webex	3	0.16%	0
Accountability Advanced	Knowledge	CBT	2	0.11%	0
Communication Intro	Knowledge	CBT	4	0.22%	0
Communication Advanced	Knowledge	CBT	4	0.22%	0
Team Building Intro	Knowledge	ILT	13	0.71%	0.01
Team Building Advanced	Knowledge	ILT	17	0.92%	0.01
Total			43	2.34%	0.02

Project Manager

Course	Group Title	Delivery Option	Time [hours]	Utilization Rate	Required #
Decisiveness Intro	Knowledge	ILT	68	3.70%	0.04
Decisiveness Advanced	Knowledge	Webex	68	3.70%	0.04
Developing Others	Knowledge	Webex	40	2.17%	0.02
Influencing/Negotiating	Knowledge	ILT	32	1.74%	0.02
Leveraging Diversity Intro	Knowledge	CBT	32	1.74%	0.02
Leveraging Diversity Advanced	Knowledge	CBT	28	1.52%	0.02
Team Building Intro	Knowledge	ILT	12	0.65%	0.01
Team Building Advanced	Knowledge	ILT	16	0.87%	0.01
Accountability Intro	Knowledge	Webex	32	1.74%	0.02
Accountability Advanced	Knowledge	CBT	28	1.52%	0.02
Change Management Intro	Knowledge	Webex	24	1.30%	0.01
Change Management Advanced	Knowledge	CBT	24	1.30%	0.01
Communication Intro	Knowledge	CBT	48	2.61%	0.03
Communication Advanced	Knowledge	CBT	44	2.39%	0.02
Total			496	26.96%	0.27

5.5 Forecast Personnel Requirements per Course Report

Forecasts personnel requirements for each course over specified time period. To generate:

Step 1: Click on the  **Forecast Personnel Requirements per Course** folder.

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

Step 3: Input Report Title, select By (Client, User or Course), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.

Start Date (mm/dd/yyyy)	Option 1
01/01/2018	
End Date (mm/dd/yyyy)	12/31/2018
Administrator: Accountability	<input checked="" type="checkbox"/>
Administrator: Accountability Advanced	<input checked="" type="checkbox"/>
Administrator: Air Craft Commander Course	<input type="checkbox"/>
Administrator: Basics of Flight 800 Aircraft Ser...	<input type="checkbox"/>
Administrator: Change Management	<input checked="" type="checkbox"/>
Administrator: Change Management Advanced	<input checked="" type="checkbox"/>
Administrator: Communication	<input checked="" type="checkbox"/>
Administrator: Communication Advanced	<input checked="" type="checkbox"/>
Administrator: Conflict Resolution	<input checked="" type="checkbox"/>
Administrator: Customer Service	<input type="checkbox"/>
Administrator: Decisioness	<input type="checkbox"/>
Administrator: Decisioness Advanced	<input checked="" type="checkbox"/>
Administrator: Developing Others	<input type="checkbox"/>
Administrator: Equipment Maintenance	<input type="checkbox"/>
Administrator: Flight Maintenance	<input type="checkbox"/>
Administrator: General Maintenance	<input type="checkbox"/>
Administrator: In Flight Leadership Decisioness	<input type="checkbox"/>
Administrator: Influencing/Negotiating	<input type="checkbox"/>
Administrator: Leadership	<input type="checkbox"/>
Administrator: Leadership: Decisioness Intro	<input checked="" type="checkbox"/>
Administrator: Leadership: Developing Others	<input checked="" type="checkbox"/>
Administrator: Leadership: Influencing / Negotiat...	<input checked="" type="checkbox"/>
Administrator: Leadership: Leveraging Diversity	<input checked="" type="checkbox"/>
Administrator: Leveraging Diversity Advanced	<input checked="" type="checkbox"/>
Administrator: Sales 101	<input type="checkbox"/>
Administrator: Sales 101	<input type="checkbox"/>
Administrator: Sales 101	<input type="checkbox"/>
Administrator: Team Building	<input checked="" type="checkbox"/>
Administrator: Team Building Advanced	<input checked="" type="checkbox"/>

The report is presented in html format, in a new window.

Step 7: You may export the report to Excel by clicking on the **[Generate Excel]** button (top left corner).

Step 8: To return to ADVISOR, close the Report window.



Forecast Personnel Requirements per Course Report

Includes Direct & Indirect Costs for Recommended Delivery Option

Period: Jan 1, 2018 to Dec 31, 2018
 Prepared by: BNH Director
 Date: September 2018

Course Title	Group Title	Media	Development [hours]			Instruction [hours]			Management
			Instructional Designer	Leadership Instructor	Diversity Instructor	Team Building Instructor	Communication Instructor	Management Instructor	
Decisiveness Intro	Knowledge	ILT	140	261					68
Developing Others	Knowledge	Webex	80	88					40
Influencing/Negotiating	Knowledge	ILT	80	70					32
Leveraging Diversity Intro	Knowledge	CBT	112		3				32
Team Building Intro	Knowledge	ILT	40			13			12
Decisiveness Advanced	Knowledge	Webex	70	130					68
Leveraging Diversity Advanced	Knowledge	CBT	140		5				28
Team Building Advanced	Knowledge	ILT	40			17			16
Accountability Intro	Knowledge	Webex	28				3		32
Accountability Advanced	Knowledge	CBT	112				2		28
Change Management Intro	Knowledge	Webex	28					2	24
Change Management Advanced	Knowledge	CBT	112					2	24
Communication Intro	Knowledge	CBT	280				4		48
Communication Advanced	Knowledge	CBT	28				4		44
Total			1290	549	8	30	13	4	496
Utilization Rate			70.11%	29.84%	0.43%	1.63%	0.71%	0.22%	26.96%
Required #			0.7	0.3	0	0.02	0.01	0	0.27

5.6 Forecast Resources Requirements per Course Report


Forecasts classrooms, facilities and equipment requirements for each course over a specific time period.
To generate:

Step 1: Click on the  **Forecast Resources Requirements per Course** folder.

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

Step 3: Input Report Title, select By (Client, User or Course), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

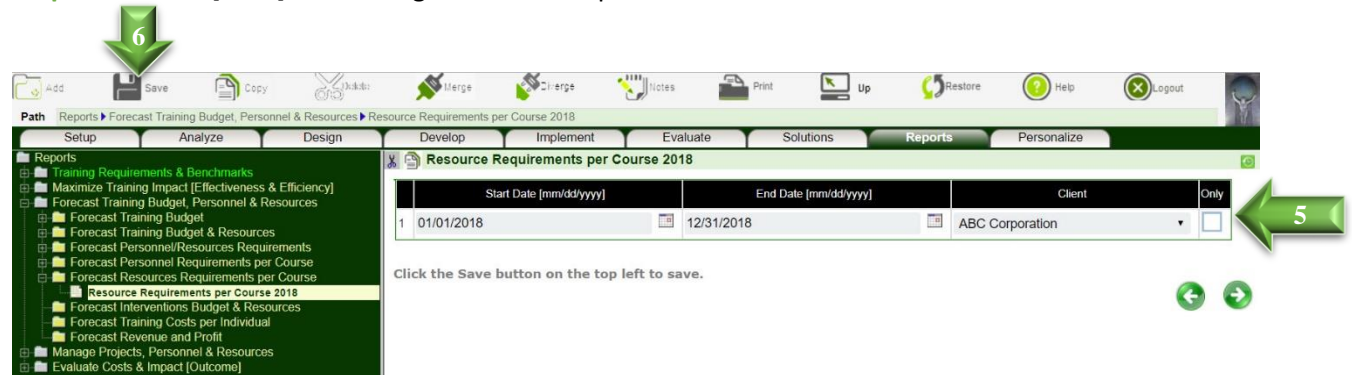
Step 4: Click **[Save]** to advance to the next screen.



Click the Save button on the top left to save.

Step 5: Specify the time period, i.e., the Start and End Dates, as well as other relevant parameters.

Step 6: Click the **[Save]** button to generate the report.



Click the Save button on the top left to save.

The report is presented in html format, in a new window.

Step 7: You may export the report to Excel by clicking on the [Generate Excel] button (top left corner).

Step 8: To return to ADVISOR, close the Report window.

Generate Excel



Resources Requirements per Course Report

Includes Direct & Indirect Costs for Recommended Delivery Option

Period: Jan 1, 2017 to Dec 31, 2017
Prepared by: BNH Director
Date: September 2017

Course Title	Group Title	Facilities [hours]		
		Media	Classroom	Computer Lab
Decisiveness Intro	Knowledge	ILT	238	
Developing Others	Knowledge	Webex		80
Influencing/Negotiating	Knowledge	ILT	64	
Leveraging Diversity Intro	Knowledge	CBT		22
Team Building Intro	Knowledge	ILT	12	
Decisiveness Advanced	Knowledge	Webex		119
Leveraging Diversity Advanced	Knowledge	CBT		19
Team Building Advanced	Knowledge	ILT	16	
Accountability Intro	Knowledge	Webex		22
Accountability Advanced	Knowledge	CBT		19
Change Management Intro	Knowledge	Webex		16
Change Management Advanced	Knowledge	CBT		16
Communication Intro	Knowledge	CBT		33
Communication Advanced	Knowledge	CBT		30
Total			330	376
Utilization Rate			16.50%	18.80%
Required #			0.17	0.19

5.7 Forecast Interventions Budget & Resources Report

Forecasts out of pocket expenses as well as personnel and resources needed to develop, administer, manage, maintain and support non-training interventions such as job aids, policies, procedures and tools over a specific time period. To generate:

Step 1: Click on the  **Forecast Interventions Budget & Resources** folder.

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

Step 3: Input Report Title, select By (Client, User or Solution) and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Path: Reports > Forecast Training Budget, Personnel & Resources > Interventions Budget & Resources 2018

Interventions Budget & Resources 2018

Report Title: Interventions Budget & Resources 2018

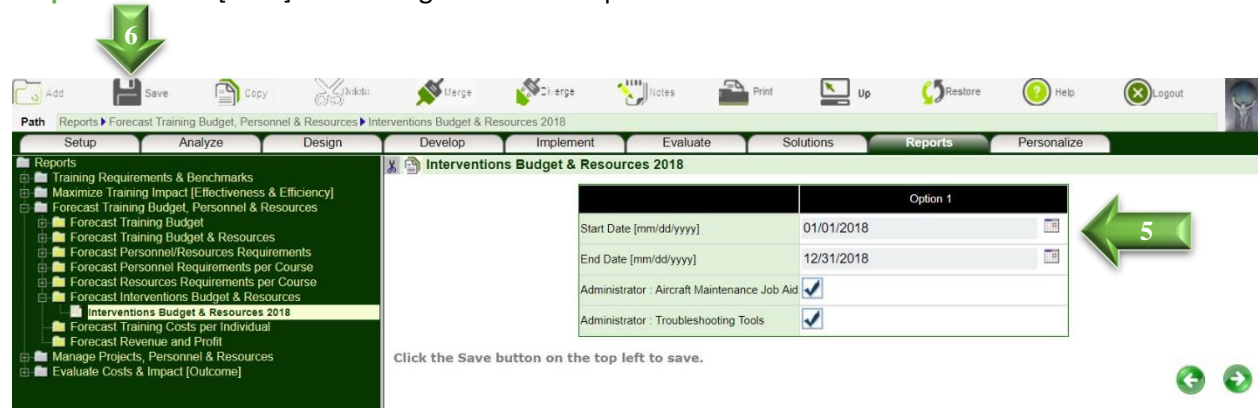
Select By: Solution

Client: ABC Corporation

Click the Save button on the top left to save.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Solutions to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



Path: Reports > Forecast Training Budget, Personnel & Resources > Interventions Budget & Resources 2018

Interventions Budget & Resources 2018


Option 1	
Start Date [mm/dd/yyyy]	01/01/2018
End Date [mm/dd/yyyy]	12/31/2018
Administrator : Aircraft Maintenance Job Aid	<input checked="" type="checkbox"/>
Administrator : Troubleshooting Tools	<input checked="" type="checkbox"/>


Click the Save button on the top left to save.

The report is presented in html format, in a new window.

Step 7: You may export the report to Excel by clicking on the [Generate Excel] button (top left corner).

Step 8: To return to ADVISOR, close the Report window.





Forecast Interventions Budget & Resources Report

Includes Direct & Indirect Costs for Recommended Delivery Option

Period: Jan 1, 2018 to Dec 31, 2018
 Prepared by: BNH Director
 Date: September 2018

Solution Title	Solution Type	# of Individuals Impacted
Troubleshooting Tools	Tools	648
Aircraft Maintenance Job Aids	Job Aids	648

Direct Start-up Costs

Solution Title	Development Costs	Hardware Costs	Software Costs	Subtotal
Troubleshooting Tools	10	1200,000	10	1200,000
Aircraft Maintenance Job Aids	10	10	1225,000	1225,000
Total	10	1 200,000	1 225,000	1 425,000

Direct Recurring Costs

Solution Title	Administrative Costs	Management Costs	Equipment Maintenance Costs	Software Maintenance Costs	Material & Revision Costs	Support Costs	Subtotal
Troubleshooting Tools	10	10	10	10	10	10	10
Aircraft Maintenance Job Aids	10	10	10	10	10	10	10
Total	10	10	10	10	10	10	10

Start-up Resources (Indirect Costs)

Solution Title	Start-up Development Staff (person days)	Start-up Support Staff (person days)	Solutions (# of units required)	Hardware (# of units required)	Software (# of units required)
Troubleshooting Tools	0	0	0	10	0
Aircraft Maintenance Job Aids	0	0	0	0	1
Total	0	0	0	10	1

Recurring Costs (Indirect Costs)

Solution Title	Administrative Staff (person days)	Management Staff (person days)	Support Staff (person days)	Equipment (hours)
Troubleshooting Tools	25	15	0	0
Aircraft Maintenance Job Aids	25	10	0	0
Total	50	25	0	0

5.8 Forecast Training Costs per Individual Report

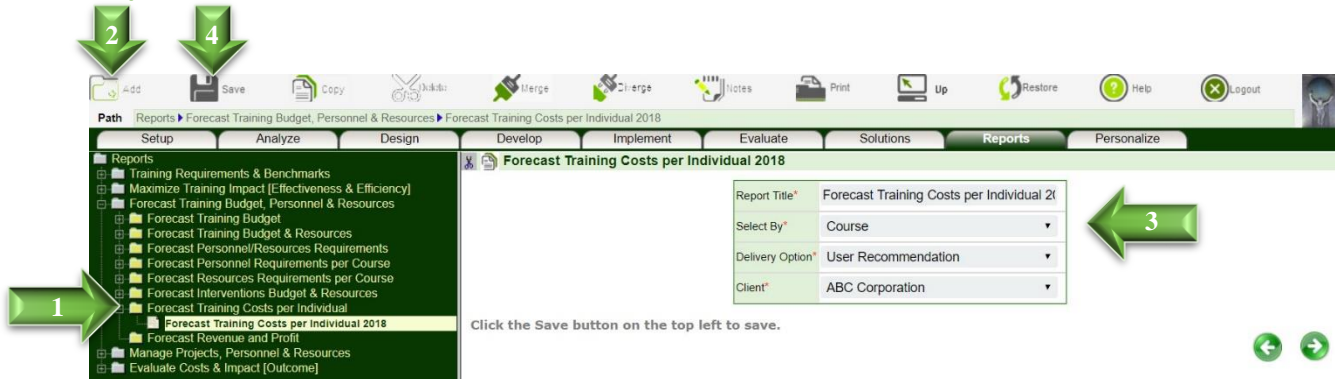
Forecasts the costs of developing specific skills/competencies within a specific time period. Compiles and computes direct and indirect costs per trainee from relevant Training Courses/Activities. To generate:

Step 1: Click on the  **Forecast Training Costs per Individual** folder.

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

Step 3: Input Report Title, select By (Client, User or Course), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Path: Reports > Forecast Training Budget, Personnel & Resources > Forecast Training Costs per Individual 2018

Forecast Training Costs per Individual 2018

Report Title* Forecast Training Costs per Individual 2018

Select By* Course

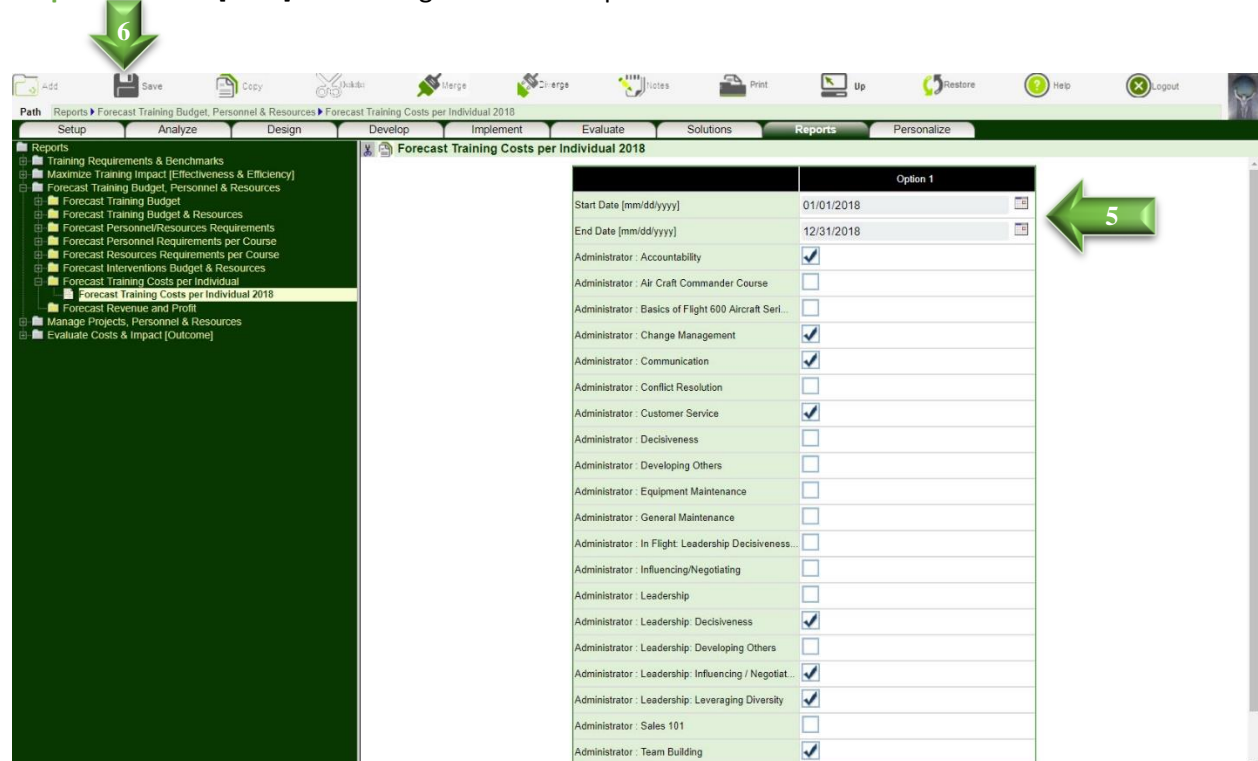
Delivery Option* User Recommendation

Client* ABC Corporation

Click the Save button on the top left to save.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



Path: Reports > Forecast Training Budget, Personnel & Resources > Forecast Training Costs per Individual 2018

Forecast Training Costs per Individual 2018

Start Date [mm/dd/yyyy] 01/01/2018

End Date [mm/dd/yyyy] 12/31/2018

Administrator	Option 1
Administrator : Accountability	<input checked="" type="checkbox"/>
Administrator : Air Craft Commander Course	<input type="checkbox"/>
Administrator : Basics of Flight 600 Aircraft Ser...	<input type="checkbox"/>
Administrator : Change Management	<input checked="" type="checkbox"/>
Administrator : Communication	<input checked="" type="checkbox"/>
Administrator : Conflict Resolution	<input type="checkbox"/>
Administrator : Customer Service	<input checked="" type="checkbox"/>
Administrator : Decisiveness	<input type="checkbox"/>
Administrator : Developing Others	<input type="checkbox"/>
Administrator : Equipment Maintenance	<input type="checkbox"/>
Administrator : General Maintenance	<input type="checkbox"/>
Administrator : In Flight Leadership Decisiveness	<input type="checkbox"/>
Administrator : Influencing/Negotiating	<input type="checkbox"/>
Administrator : Leadership	<input type="checkbox"/>
Administrator : Leadership: Decisiveness	<input checked="" type="checkbox"/>
Administrator : Leadership: Developing Others	<input type="checkbox"/>
Administrator : Leadership: Influencing / Negotiat...	<input checked="" type="checkbox"/>
Administrator : Leadership: Leveraging Diversity	<input checked="" type="checkbox"/>
Administrator : Sales 101	<input type="checkbox"/>
Administrator : Team Building	<input checked="" type="checkbox"/>

Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.

Step 8: To return to ADVISOR, close the Report window.



Forecast Training Costs per Individual Report

Parameters: Courses
January 01, 2018 to December 31, 2018

Prepared by: BNH Director

Date: September 2018

Delivery Option: User Recommended

Course Title	Direct Costs per Trainee	Indirect Costs per Trainee	Total Costs per Trainee
Accountability	\$3	\$25	\$28
Change Management	\$4	\$107	\$111
Communication	\$0	\$162	\$162
Decisiveness	\$0	\$198	\$198
Influencing/Negotiating	\$13	\$95	\$108
Leveraging Diversity	\$35	\$49	\$84
Customer Service	\$14	\$28	\$42
Team Building	\$13	\$40	\$53
Total:	\$82	\$704	\$786

Courses Analyzed

Course Title	Training Division	Manager	Start Date (Year)	Currency
Accountability	Operations	BNH Director	2018	US Dollar
Change Management	Operations	BNH Director	2018	US Dollar
Communication	Operations	BNH Director	2018	US Dollar
Decisiveness	Operations	BNH Director	2018	US Dollar
Influencing/Negotiating	Operations	BNH Director	2018	US Dollar
Leveraging Diversity	Operations	BNH Director	2018	US Dollar
Customer Service	Operations	BNH Director	2018	US Dollar
Team Building	Operations	BNH Director	2018	US Dollar

* Course Title Dimmed = Incomplete

5.9 Forecast Revenue and Profit Report

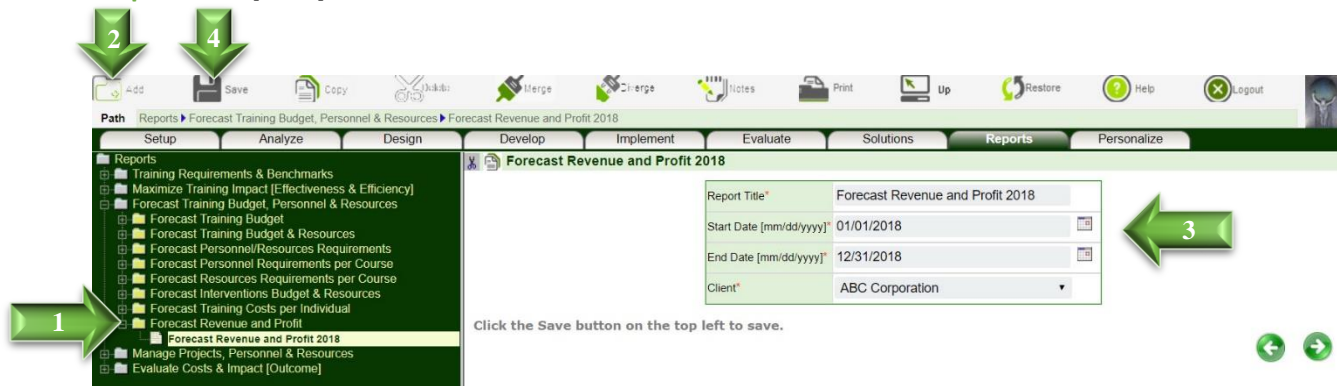
Forecasts and compares the costs of each Training Course/Activity to projected revenue within a specific time period; and computes net profit/loss and Return on Investment (ROI). To generate:

Step 1: Click on the  **Forecast Revenue and Profit** folder.

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

Step 3: Input Report Title, Start and End Dates and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.



Path: Reports > Forecast Training Budget, Personnel & Resources > Forecast Revenue and Profit 2018

Report Title: Forecast Revenue and Profit 2018

Start Date [mm/dd/yyyy]: 01/01/2018

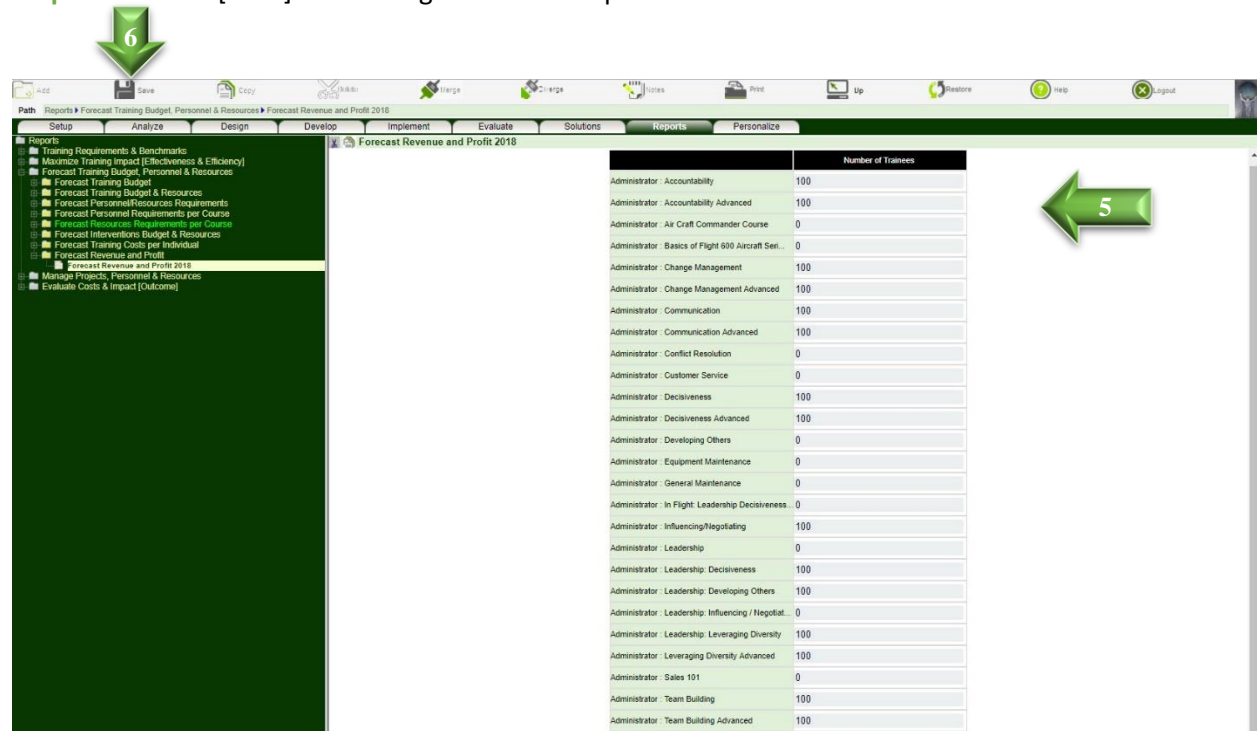
End Date [mm/dd/yyyy]: 12/31/2018

Client: ABC Corporation

Click the Save button on the top left to save.

Step 5: Input the number of Individuals to be trained in each of the Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



Path: Reports > Forecast Training Budget, Personnel & Resources > Forecast Revenue and Profit 2018

	Number of Trainees
Administrator: Accountability	100
Administrator: Accountability Advanced	100
Administrator: Air Craft Commander Course	0
Administrator: Basics of Flight 800 Aircraft Ser...	0
Administrator: Change Management	100
Administrator: Change Management Advanced	100
Administrator: Communication	100
Administrator: Communication Advanced	100
Administrator: Conflict Resolution	0
Administrator: Customer Service	0
Administrator: Decisiveness	100
Administrator: Decisiveness Advanced	100
Administrator: Developing Others	0
Administrator: Equipment Maintenance	0
Administrator: General Maintenance	0
Administrator: In Flight Leadership Decisiveness	0
Administrator: Influencing/Negotiating	100
Administrator: Leadership	0
Administrator: Leadership: Decisiveness	100
Administrator: Leadership: Developing Others	100
Administrator: Leadership: Influencing / Negotiat...	0
Administrator: Leadership: Leveraging Diversity	100
Administrator: Leveraging Diversity Advanced	100
Administrator: Sales 101	0
Administrator: Team Building	100
Administrator: Team Building Advanced	100

The report is presented in html format, in a new window.

Step 7: You may export the report to Excel by clicking on the [Generate Excel] button (top left corner).

Step 8: To return to ADVISOR, close the Report window.

Generate Excel

7

8

Forecast Revenue and Profit Report

Includes Direct & Indirect Costs for Current Delivery Option

Period: Jan 1, 2018 to Dec 31, 2018
 Prepared by: BNH Director
 Date: September 2018

Total Direct & Indirect Costs for requested Time Period

Course Title	Group Title	Delivery Option	Length (hours)	Development Costs	Hardware Costs	Administrative Costs	Management Costs	Trainees Costs	Instructors Costs	Facilities Costs	Support Costs	Total
Decisiveness Intro	Knowledge	ILT	14	\$0	\$0	\$0	\$3,843	\$0	\$13,873	\$714	\$0	\$18,430
Leveraging Diversity Intro	Knowledge	CBT	4	\$0	\$0	\$0	\$1,809	\$0	\$170	\$134	\$0	\$2,113
Accountability Advanced	Knowledge	ILT	4	\$0	\$0	\$0	\$1,583	\$4,638	\$1,197	\$84	\$0	\$7,501
Influencing/Negotiating	Knowledge	ILT	8	\$0	\$0	\$0	\$1,809	\$0	\$3,730	\$192	\$0	\$5,731
Leveraging Diversity Advanced	Knowledge	ILT	4	\$0	\$0	\$0	\$1,583	\$2,150	\$1,632	\$84	\$0	\$5,449
Accountability Intro	Knowledge	Webex	4	\$0	\$0	\$0	\$1,809	\$0	\$124	\$134	\$0	\$2,067
Change Management Advanced	Knowledge	ILT	4	\$0	\$0	\$0	\$1,357	\$4,058	\$1,212	\$72	\$0	\$6,699
Developing Others	Knowledge	ILT	8	\$0	\$0	\$0	\$2,261	\$42,500	\$4,663	\$240	\$0	\$49,664
Decisiveness Advanced	Knowledge	ILT	7	\$0	\$0	\$0	\$3,843	\$11,667	\$6,936	\$357	\$0	\$122,803
Communication Intro	Knowledge	Webex	4	\$0	\$0	\$0	\$2,713	\$13,635	\$187	\$202	\$0	\$16,736
Team Building Intro	Knowledge	Webex	4	\$0	\$0	\$0	\$678	\$0	\$513	\$72	\$0	\$1,263
Team Building Advanced	Knowledge	ILT	4	\$0	\$0	\$0	\$904	\$0	\$684	\$48	\$0	\$1,636
Change Management Intro	Knowledge	ILT	4	\$0	\$0	\$0	\$1,357	\$6,957	\$1,212	\$72	\$0	\$9,598
Communication Advanced	Knowledge	ILT	4	\$0	\$0	\$0	\$2,487	\$11,022	\$1,081	\$132	\$0	\$15,522
Total			77	\$0	\$0	\$0	\$28,034	\$196,625	\$38,014	\$2,537	\$0	\$265,211

Projected Revenue


Course Title	Year	Projected # of Trainees	Fee per Trainee	Total Revenue
Decisiveness Intro	2017	35	\$500	\$17,500
Leveraging Diversity Intro	2017	75	\$400	\$30,000
Accountability Advanced	2017	40	\$2,000	\$80,000
Influencing/Negotiating	2017	90	\$2,000	\$180,000
Leveraging Diversity Advanced	2017	50	\$3,000	\$150,000
Accountability Intro	2017	50	\$150	\$7,500
Change Management Advanced	2017	30	\$500	\$15,000
Developing Others	2017	70	\$1,500	\$105,000
Decisiveness Advanced	2017	75	\$1,000	\$75,000
Communication Intro	2017	50	\$400	\$20,000
Team Building Intro	2017	75	\$350	\$26,250
Team Building Advanced	2017	50	\$2,000	\$100,000
Change Management Intro	2017	60	\$425	\$25,500
Communication Advanced	2017	25	\$600	\$15,000
Total				\$846,750

Projected Profit/Loss

Course Title	Total Revenue	Total Cost	Projected Profit/Loss	Rate
Decisiveness Intro	\$17,500	\$18,430	-\$930	-5.05%
Leveraging Diversity Intro	\$30,000	\$2,113	\$27,887	1328.05%
Accountability Advanced	\$80,000	\$7,501	\$72,499	966.52%
Influencing/Negotiating	\$180,000	\$5,731	\$174,269	3040.81%
Leveraging Diversity Advanced	\$150,000	\$5,449	\$144,551	2653.00%
Accountability Intro	\$7,500	\$2,067	\$5,433	262.77%
Change Management Advanced	\$15,000	\$6,699	\$8,301	123.51%
Developing Others	\$105,000	\$49,664	\$55,336	111.42%
Decisiveness Advanced	\$75,000	\$122,803	-\$47,803	-38.93%
Communication Intro	\$20,000	\$16,736	\$3,264	19.50%
Team Building Intro	\$26,250	\$1,636	\$24,614	1978.06%
Team Building Advanced	\$100,000	\$1,636	\$98,364	6010.98%
Change Management Intro	\$25,500	\$9,598	\$15,902	165.69%
Communication Advanced	\$15,000	\$15,522	-\$522	-3.36%
Total	\$846,750	\$265,211	\$581,539	219.27%

Chapter 6: Manage Projects, Personnel & Resources

6.1 Overview

Keeps projects on time and within budget, by optimizing the utility of personnel and resources. The reports can be accessed under the  **Manage Projects, Personnel & Resources** folder under the [Reports] tab. Brief description of key report is presented below.

6.2 Training Costs per Client Report

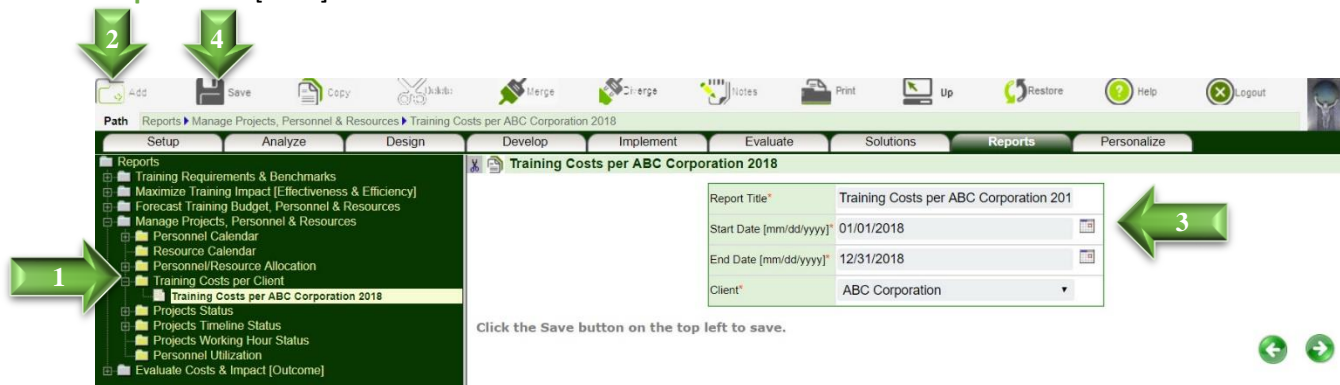
Computes the costs for each Client within a specific time period based on the number of individuals to be trained in each course. To generate:

Step 1: Click  next to  **Manage Projects, Personnel & Resources** folder and click on the  **Training Costs per Client** folder.

Step 2: Click on the [Add] button.

Step 3: Input Report Title, Start and End Dates and the Client that the report is assigned to.

Step 4: Click [Save] to advance to the next screen.



Path: Reports > Manage Projects, Personnel & Resources > Training Costs per ABC Corporation 2018

Setup Analyze Design Develop Implement Evaluate Solutions Reports Personalize

Reports

- Training Requirements & Benchmarks
- Maximize Training Impact [Effectiveness & Efficiency]
- Forecast Training Budget, Personnel & Resources
- Manage Projects, Personnel & Resources
 - Personnel Calendar
 - Resource Calendar
 - Personnel/Resource Allocation
 - Training Costs per Client
 - Training Costs per ABC Corporation 2018**
- Projects Status
- Projects Timeline Status
- Projects Working Hour Status
- Personnel Utilization
- Evaluate Costs & Impact [Outcome]

Training Costs per ABC Corporation 2018

Report Title* Training Costs per ABC Corporation 201

Start Date [mm/dd/yyyy]* 01/01/2018

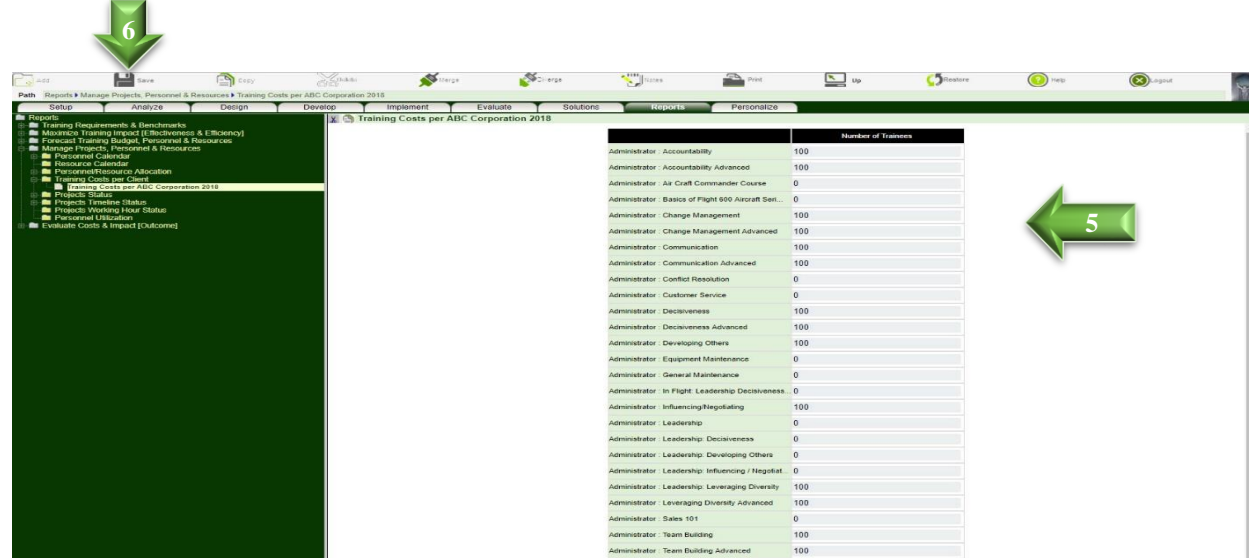
End Date [mm/dd/yyyy]* 12/31/2018

Client* ABC Corporation

Click the Save button on the top left to save.

Step 5: Input the number of Individuals to be trained, within each of the Courses to be included in Report.

Step 6: Click the [Save] button to generate the report.



Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.



Parameters: January 01, 2018 to December 31, 2018

Prepared by: BNH Director

Date: September 2018




Course Title	Fee per Trainee	Number of Trainees	Total Cost
Accountability Advanced	\$2,000	30	\$60,000
Accountability Intro	\$150	45	\$6,750
Change Management Advanced	\$500	15	\$7,500
Change Management Intro	\$425	10	\$4,250
Communication Advanced	\$600	15	\$9,000
Communication Intro	\$400	25	\$10,000
Decisiveness Advanced	\$1,000	40	\$40,000
Decisiveness Intro	\$500	65	\$32,500
Developing Others	\$1,500	35	\$52,500
Influencing/Negotiating	\$2,000	20	\$40,000
Leveraging Diversity Advanced	\$3,000	40	\$120,000
Leveraging Diversity Intro	\$400	45	\$18,000
Team Building Advanced	\$2,000	30	\$60,000
Team Building Intro	\$350	20	\$7,000

Total: \$467,500

Step 8: Click on the [Next] button to advance to the next page of the report.

Step 9: To return to ADVISOR, close the Report window.

Note:

- Fees per Trainee can be specified for each course for each the years that the Course will be delivered. To input the Fee, click on the [Design] tab; click  next to the **Course Analysis Folder** to expand; click  next the **(course title)** node to expand; click  next to the **Course Summary** folder to expand and click the **Projected Revenue** node. For each year, specify the projected minimum and maximum number of trainees as well as the Charge (Fee) per Trainee.

Chapter 7: Evaluate Costs & Impact

7.1 Overview

Assesses the costs and impact of Training Courses/Activities. For example, compares actual to forecasted costs; and computes the Return on Investment (ROI) by comparing training costs to benefits (such as cost avoidance, gained productivity and/or revenue). The reports can be accessed under the **Evaluate Costs & Impact [Outcome]** folder under the **[Reports]** tab. Brief description of key reports is presented below.

7.2 Compare Actual to Forecasted Costs Report

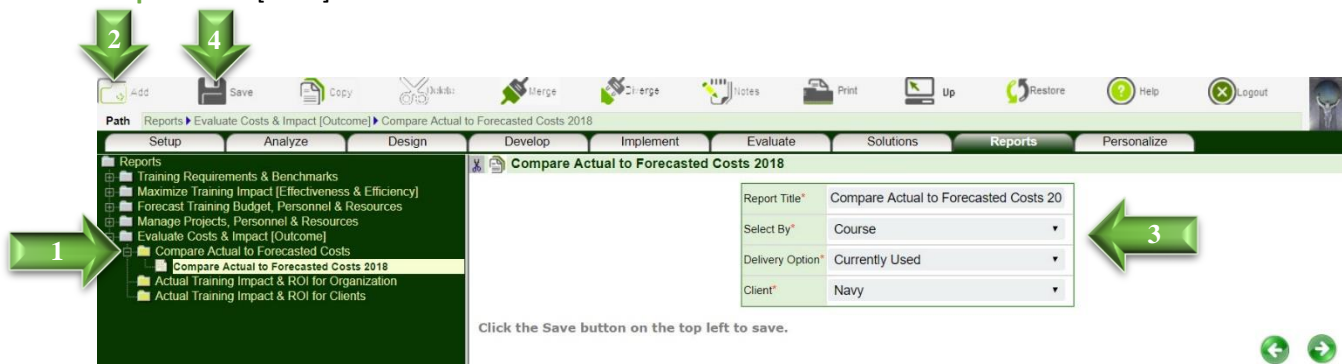
Compares the actual costs of each Training Course/Activity to forecasts for a specific time period. Detailed costs breakdown are also provided to identify the reasons behind the disparity. To generate:

Step 1: Click **+** next to **Evaluate Costs & Impact [Outcome]** folder and click on the **Compare Actual to Forecasted Costs** folder.

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

Step 3: Input Report Title, select By (Client, User or Course), whether the report should be based on the “Currently Used” or “User Recommendation” Delivery Option, and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.

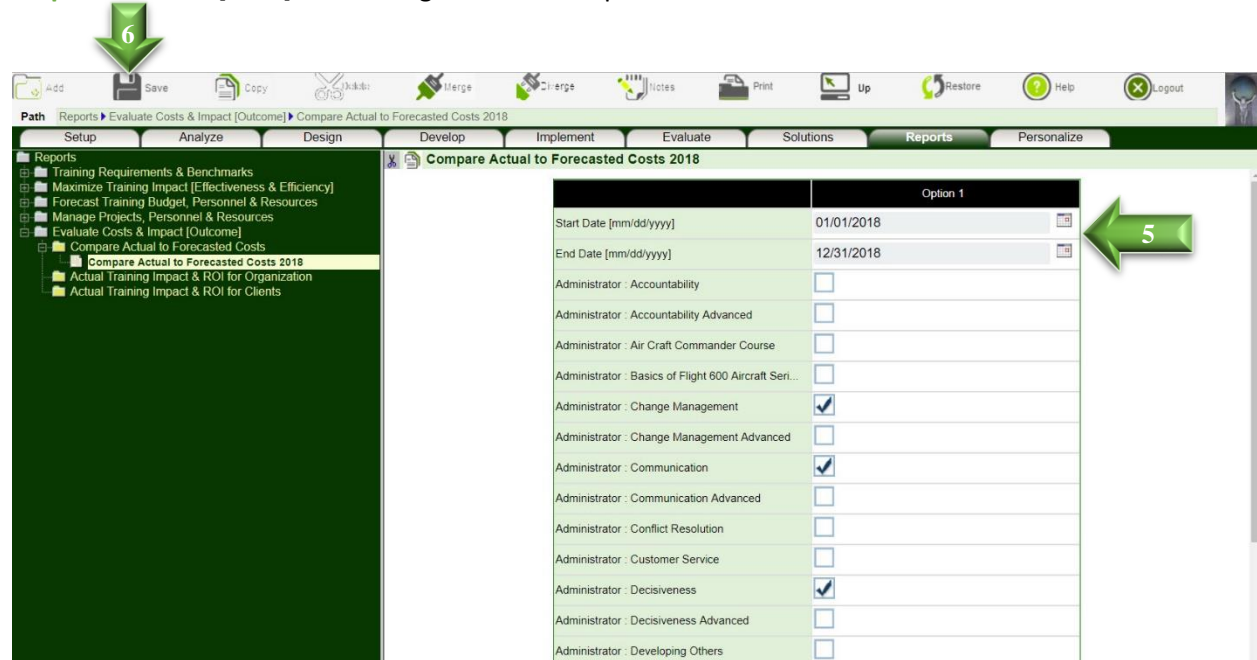


Note:

- Since the report focuses on actual (versus forecasted) training costs and revenues, if **Actual Costs** and **Actual Revenues** have not been captured for Courses under investigation under the **[Design]** tab, zero costs and revenue will be reported.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the [Save] button to generate the report.



Path: Reports > Evaluate Costs & Impact [Outcome] > Compare Actual to Forecasted Costs 2018

Setup Analyze Design Develop Implement Evaluate Solutions Reports Personalize

Reports

- Training Requirements & Benchmarks
- Maximize Training Impact [Effectiveness & Efficiency]
- Forecast Training Budget, Personnel & Resources
- Manage Projects, Personnel & Resources
- Evaluate Costs & Impact [Outcome]
 - Compare Actual to Forecasted Costs
 - Compare Actual to Forecasted Costs 2018
 - Actual Training Impact & ROI for Organization
 - Actual Training Impact & ROI for Clients

Compare Actual to Forecasted Costs 2018

Option 1

Start Date [mm/dd/yyyy] 01/01/2018

End Date [mm/dd/yyyy] 12/31/2018

Administrator : Accountability ☐

Administrator : Accountability Advanced ☐

Administrator : Air Craft Commander Course ☐

Administrator : Basics of Flight 600 Aircraft Seri... ☐

Administrator : Change Management ☒

Administrator : Change Management Advanced ☐

Administrator : Communication ☒

Administrator : Communication Advanced ☐

Administrator : Conflict Resolution ☐

Administrator : Customer Service ☐

Administrator : Decisiveness ☒

Administrator : Decisiveness Advanced ☐

Administrator : Developing Others ☐

Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.



7 / 1+ Main Report 100%

Compare Actual to Forecasted Costs Report

Parameters: Courses
January 01, 2018 to December 31, 2018

Prepared by: BNH Director

Date: September 2018

Delivery Option: Currently Used



Course Title	Projected Direct Costs	Actual Direct Costs	Direct Costs Disparity	Projected Indirect Costs	Actual Indirect Costs	Indirect Costs Disparity	Total Disparity	% Disparity
Change Management	\$2,000	\$2,200	-\$200	\$2,641	\$4,350	-\$1,709	-\$1,909	-41.13%
Communication	\$0	\$2,000	-\$2,000	\$6,500	\$4,800	\$1,700	-\$300	-4.62%
Decisiveness	\$115,167	\$75,270	\$39,897	\$11,136	\$12,300	-\$1,164	\$38,733	30.67%
Total:	\$117,167	\$79,470	\$37,697	\$20,277	\$21,450	-\$1,173	\$36,524	

* Course Title Dimmed = Incomplete

Step 8: Click on a [Course Title], Communication for example, to view a detailed breakdown of Course costs, including Projected Direct and Indirect Costs, Actual Direct and Indirect Costs, Direct and Indirect Costs Disparity, Total Disparity and % of Disparity.

Step 9: To return to ADVISOR, close the Report window.



Communication	\$0	\$2,000	-\$2,000	\$6,500	\$4,800	\$1,700	-\$300	-4.62%
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Title	Projected Direct Costs	Actual Direct Costs	Direct Costs Disparity	Projected Indirect Costs	Actual Indirect Costs	Indirect Costs Disparity	Total Disparity	% Disparity
Development Costs	\$0	\$2,000	-\$2,000	\$2,000	\$0	\$2,000	\$0	0.00%
Hardware Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.00%
Hidden Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.00%
Administrative Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.00%
Management Costs	\$0	\$0	\$0	\$2,478	\$2,200	\$287	\$287	11.54%
Trainee Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.00%
Instructor Costs	\$0	\$0	\$0	\$1,881	\$1,800	\$81	\$81	4.31%
Facility Costs	\$0	\$0	\$0	\$132	\$800	-\$668	-\$668	-506.06%
Transmission Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.00%
Maintenance Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.00%
Support Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	0.00%

Projected # of Trainees	Actual # of Trainees	Disparity	% of Disparity
65.00	70	5	7.69%

7.3 Actual Training Impact & ROI for Organization Report

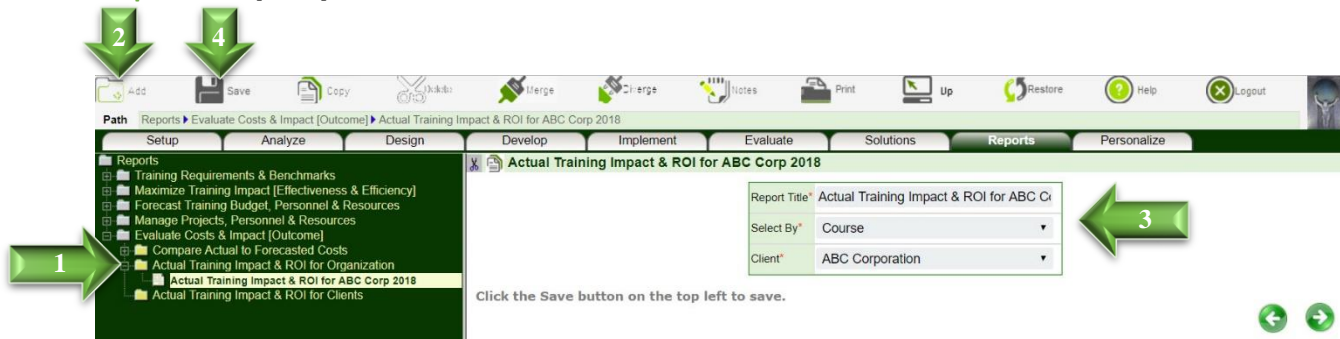
Computes the Return on Investment (ROI) of Training Courses/Activities by comparing actual costs to actual impact on missions/goals. To generate:

Step 1: Click on the  **Actual Training Impact & ROI for Organization** folder.



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

Step 3: Input Report Title, select By (Client, User or Course) and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.

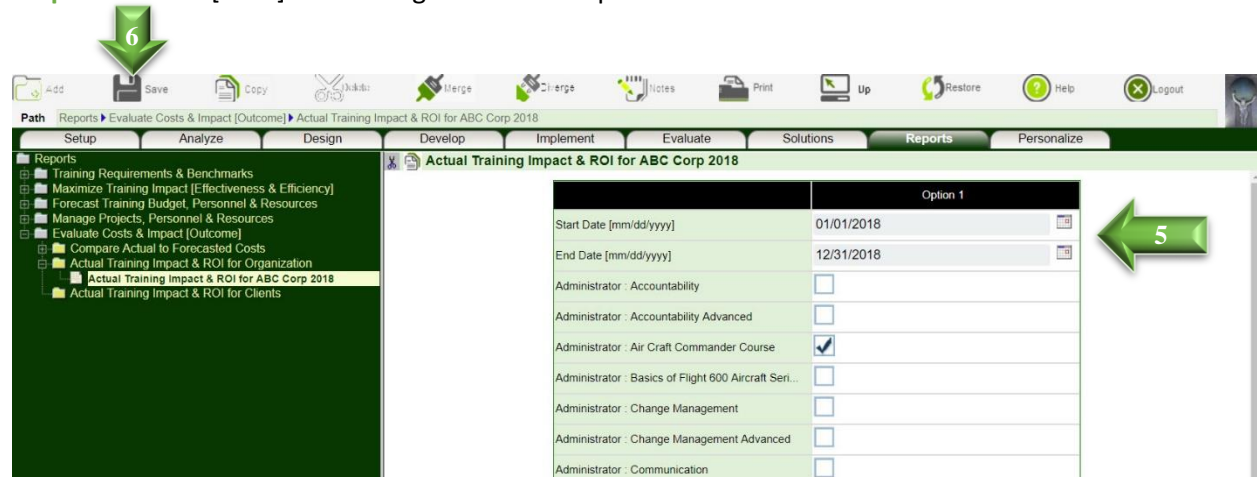


Note:

- Since the report focuses on actual (versus forecasted) training costs and revenues, if  **Actual Costs** and  **Actual Revenues** have not been captured for Courses under investigation under the Design tab, zero costs and revenue will be reported.
- Moreover, Course Learning Objectives must be linked to a Performance or Enabling Objective (under the **[Analyze]** tab) that is in-turn inked to a Mission or Goal. Otherwise, zero costs and revenue will be reported.

Step 5: Specify the time period, i.e., the Start and End Dates, and select Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.



Actual Training Impact & ROI for Organization Report

Parameters: Courses
January 01, 2018 to December 31, 2018

Prepared by: BNH Director

Date: September 2018

Performance Objective	Job Profile	Mission	Project
Aircraft Commander Course (ROI = 27.47%)			
Verify weight & fuel requirements	Aircraft Commander	Transport Equipment	C130J

* Course Title Dimmed = Incomplete

Step 8: Click on a [Course Title], Aircraft Commander Course for example, to view additional details including Course Impact, Course Costs, Course Benefits, Expected Life of Course and Annual ROI.

Step 9: To return to ADVISOR, close the Report window.

Aircraft Commander Course (ROI = 27.47%)

Course Impact	\$375,000
Course Costs	\$158,000
Course Benefits	\$217,000
Expected Life of Course	5
Annual ROI	27.47%

7.4 Actual Training Impact & ROI for Clients Report

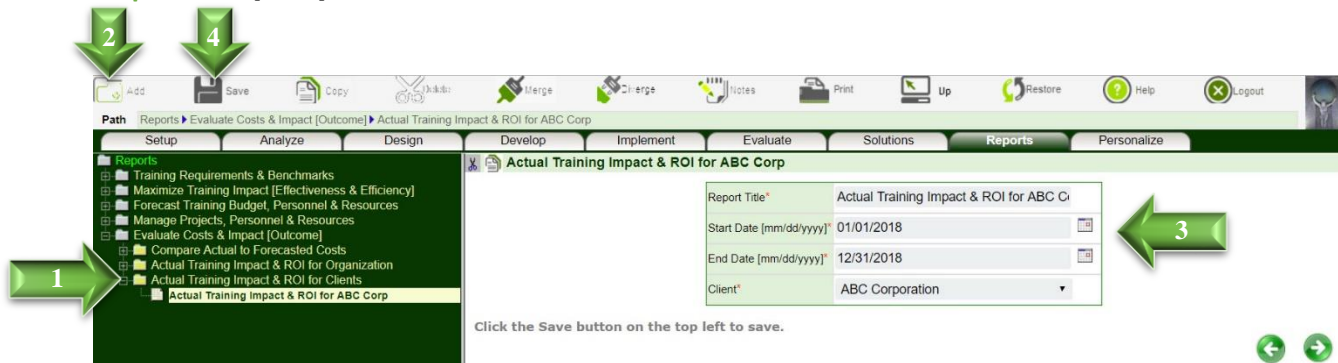
Computes the Return on Investment (ROI) of Training Courses/Activities by comparing actual Clients' costs to actual impact on missions/goals. To generate:

Step 1: Click on the  **Actual Training Impact & ROI for Clients** folder.



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

Step 3: Input Report Title, Start and End Dates and the Client that the report is assigned to.

Step 4: Click **[Save]** to advance to the next screen.

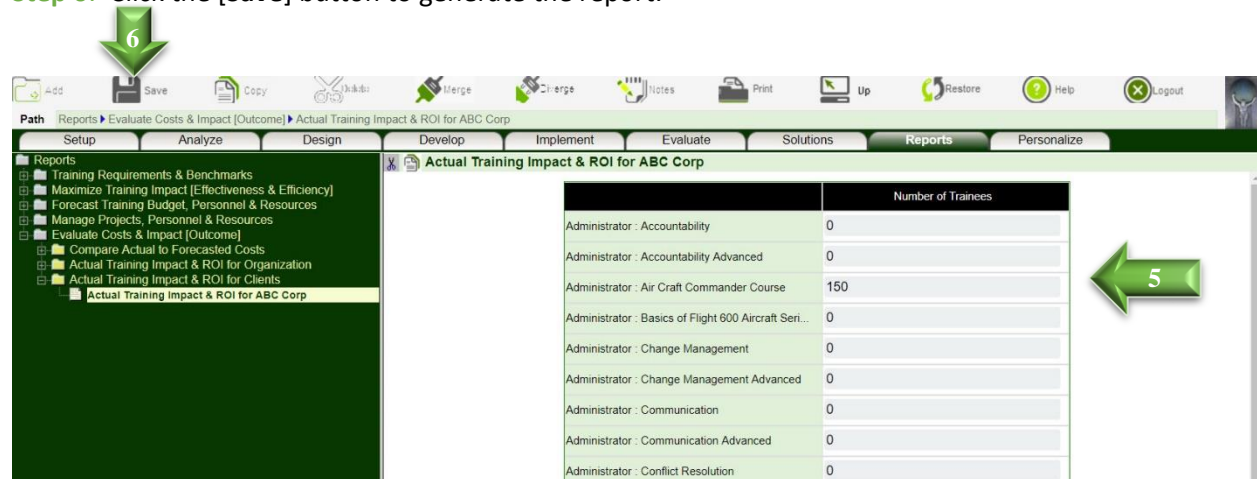


Note:

- Since the report focuses on actual (versus forecasted) training costs and revenues, if  **Actual Costs** and  **Actual Revenues** have not been captured for Courses under investigation under the **[Design]** tab, zero costs and revenue will be reported.

Step 5: Input the number of Individuals to be trained within each of the Courses to be included in the Report.

Step 6: Click the **[Save]** button to generate the report.



Step 7: The report is presented in a new window. You may export the report to other file formats such as Microsoft Word or PDF by clicking on the corresponding icon in the top left corner.



Actual Training Impact & ROI for Clients Report

Parameters: January 01, 2018 to December 31, 2018

Prepared by: BNH Director

Date: September 2018



Performance Objective	Job Profile	Mission	Project
Aircraft Commander Course (ROI = 25.00%)			
Verify weight & fuel requirements	Aircraft Commander	Transport Equipment	C130J

* Course Title Dimmed = Incomplete


Step 8: Click on a [Course Title], Aircraft Commander Course for example, to view additional details including Course Impact, Course Costs, Course Benefits, Expected Life of Course and Annual ROI.

Step 9: To return to ADVISOR, close the Report window.



Aircraft Commander Course (ROI = 275.00%)

Course Impact	\$375,000
Course Costs	\$300,000
Course Benefits	\$75,000
Expected Life of Course	5
ROI	25.00%

Remember that context sensitive help is also available for each screen by clicking on the **[Help]** button and video clips on how to perform specific functions by clicking on the  icon.

Enjoy!

