

LEAD Documentation

User Manual

Build 2.0 from 12/4/2024
©2024 Aimereon
Aimereon, Inc.

This page is intentionally left blank.

| | |
|---------------------------------------------------------|-----------|
| 1. Welcome | 9 |
| 1.1 Login to LEAD | 15 |
| 1.1.1 Request an Account | 16 |
| 1.1.2 Forgot Password | 16 |
| 1.1.3 Single-Sign-On | 17 |
| 1.2 Using LEAD | 17 |
| 1.3 Help | 18 |
| 1.3.1 Contact US | 19 |
| 1.4 [Your User Name] | 19 |
| 1.4.1 My Profile | 20 |
| 1.4.2 Change Password | 20 |
| 1.4.3 Login History | 20 |
| 2. Home > Dashboard | 21 |
| 2.1 Milestones | 22 |
| 2.2 Assignments | 23 |
| 3. Initiatives | 25 |
| 3.1 Work with Initiatives | 27 |
| 3.2 Analysis | 28 |
| 3.2.1 Initiative Management | 29 |
| 3.2.1.1 Team Members | 29 |
| 3.2.1.2 Assignments | 30 |
| 3.2.1.3 Resource Management | 31 |
| 3.2.2 Training Needs Analysis | 33 |
| 3.2.2.1 Justification (TNA Only) | 35 |
| 3.2.2.2 Initiative Overview (TNA and TMD) | 36 |
| 3.2.2.3 Milestones (TNA Only) | 37 |
| 3.2.2.4 Safety Risks and Hazardous Materials (TNA Only) | 38 |
| 3.2.2.5 Target Audience (TNA and TMD) | 39 |
| 3.2.2.6 Qualification Earned (TNA and TMD) | 40 |
| 3.2.2.7 Associated Learning Events (TNA and TMD) | 41 |
| 3.2.2.8 Training Data (TNA and TMD) | 42 |
| 3.2.2.8.1 Facilities (TNA and TMD) | 44 |
| 3.2.2.8.2 Funding (TNA and TMD) | 45 |
| 3.2.2.8.3 Personnel (TNA and TMD) | 46 |
| 3.2.2.8.4 Resources (TNA and TMD) | 48 |
| 3.2.2.9 Initiative Locations (TNA and TMD) | 49 |
| 3.2.2.9.1 [Selected] Initiative Location (TNA and TMD) | 50 |
| 3.2.2.9.1.1 Facilities (TNA and TMD) | 52 |
| 3.2.2.9.1.2 Funding (TNA and TMD) | 53 |
| 3.2.2.9.1.3 Personnel (TNA and TMD) | 55 |

| | | |
|-------------|---------------------------------------------|-----|
| 3.2.2.9.1.4 | Resources (TNA and TMD) | 57 |
| 3.2.3 | Task Analysis | 59 |
| 3.2.3.1 | Job | 60 |
| 3.2.3.2 | Duty | 62 |
| 3.2.3.3 | Task | 64 |
| 3.2.3.4 | Subtask | 66 |
| 3.2.3.5 | Step | 68 |
| 3.2.3.6 | Adding Conditions, Standards, and Resources | 70 |
| 3.2.3.7 | Adding Knowledge, Skills, and Abilities | 70 |
| 3.2.3.8 | Adding Interventions | 70 |
| 3.2.3.9 | Selecting from Competencies | 70 |
| 3.2.4 | Documents | 72 |
| 3.3 | Objectives | 72 |
| 3.3.1 | Viewing or Editing Terminal Objectives | 75 |
| 3.3.2 | Viewing or Editing Enabling Objectives | 75 |
| 3.3.3 | Selecting the Skill Basis | 75 |
| 3.4 | Design | 75 |
| 3.4.1 | Initiative Management | 77 |
| 3.4.1.1 | Team Members | 77 |
| 3.4.1.2 | Assignments | 78 |
| 3.4.1.3 | Resource Management | 79 |
| 3.4.2 | Training Management Document | 81 |
| 3.4.2.1 | Foreword (TMD Only) | 82 |
| 3.4.2.2 | Changes from Previous Version (TMD Only) | 83 |
| 3.4.2.3 | Initiative Overview (TNA and TMD) | 84 |
| 3.4.2.4 | Purpose of Initiative (TMD Only) | 85 |
| 3.4.2.5 | Target Audience (TNA and TMD) | 86 |
| 3.4.2.6 | Qualification Earned (TNA and TMD) | 87 |
| 3.4.2.7 | Associated Learning Events (TNA and TMD) | 88 |
| 3.4.2.8 | Training Data (TNA and TMD) | 89 |
| 3.4.2.8.1 | Schedule (TMD Only) | 91 |
| 3.4.2.8.2 | Facilities (TNA and TMD) | 92 |
| 3.4.2.8.3 | Funding (TNA and TMD) | 93 |
| 3.4.2.8.4 | Personnel (TNA and TMD) | 94 |
| 3.4.2.8.5 | Resources (TNA and TMD) | 96 |
| 3.4.2.9 | Initiative Locations (TNA and TMD) | 97 |
| 3.4.2.9.1 | Selected Initiative Location (TNA and TMD) | 98 |
| 3.4.2.9.1.1 | Schedule (TMD Only) | 100 |
| 3.4.2.9.1.2 | Facilities (TNA and TMD) | 102 |
| 3.4.2.9.1.3 | Funding (TNA and TMD) | 103 |
| 3.4.2.9.1.4 | Personnel (TNA and TMD) | 104 |
| 3.4.2.9.1.5 | Resources (TNA and TMD) | 106 |
| 3.4.3 | Curriculum Development | 108 |
| 3.4.3.1 | Course Level | 110 |
| 3.4.3.2 | Module Level | 112 |

| | | |
|------------|-----------------------------------------------------------|------------|
| 3.4.3.3 | Terminal Objective Level | 113 |
| 3.4.3.4 | Overview/Summary | 116 |
| 3.4.3.5 | Enabling Objective Level | 117 |
| 3.4.3.6 | Assessment | 119 |
| 3.4.4 | Testing Plan | 120 |
| 3.4.4.1 | Test Matrix | 121 |
| 3.4.5 | Documents | 123 |
| 3.5 | Develop | 124 |
| 3.5.1 | Front Matter | 126 |
| 3.5.2 | Course Level | 126 |
| 3.5.3 | Module Level | 128 |
| 3.5.4 | Terminal Objective Level | 129 |
| 3.5.5 | Overview/Summary | 131 |
| 3.5.6 | Enabling Objective Level | 132 |
| 3.5.7 | Elements | 135 |
| 3.5.7.1 | Sub-Elements | 136 |
| 3.5.8 | Sheets | 138 |
| 3.5.8.1 | Adding Multiple Resources to a Sheet | 140 |
| 3.5.8.2 | Editing a Resource Citation/Entry | 141 |
| 3.5.9 | Test Items | 141 |
| 3.5.10 | Storyboard | 143 |
| 3.5.11 | Adding or Editing a Text/Note/Caution/Warning Entry | 144 |
| 3.5.12 | Adding a Resource Citation/Entry | 144 |
| 3.5.12.1 | Working with IETM Table of Contents | 145 |
| 3.5.13 | Editing a Resource Citation/Entry | 146 |
| 3.5.14 | Adding or Editing a Sheet Citation/Entry | 146 |
| 3.5.15 | Cited Resources | 146 |
| 3.5.16 | Cited Sheets | 149 |
| 3.5.17 | Assessment | 149 |
| 3.5.18 | Documents | 151 |
| 3.6 | Implement | 152 |
| 4. | Competencies | 157 |
| 5. | Resources | 161 |
| 5.1 | Consumables | 162 |
| 5.2 | IETMs | 164 |
| 5.3 | IMM | 167 |
| 5.4 | Publications | 169 |
| 5.5 | Software | 171 |
| 5.6 | Tools/Equipment | 173 |

| | | |
|------------|-----------------------------------------------------------------------------------------------|------------|
| 5.7 | Unused Resource Management | 175 |
| 6. | Library | 177 |
| 6.1 | Verbs | 178 |
| 6.2 | Conditions | 180 |
| 6.3 | Standards | 181 |
| 6.4 | Knowledge | 183 |
| 6.5 | Skills | 185 |
| 6.6 | Abilities | 187 |
| 6.7 | Interventions | 188 |
| 7. | Reports | 191 |
| 8. | Admin | 195 |
| 8.1 | Announcements | 196 |
| 8.2 | Departments | 197 |
| 8.3 | Locations | 199 |
| 8.4 | Users | 200 |
| 8.5 | Roles | 201 |
| 8.6 | System Logs | 202 |
| 8.7 | In-Use | 203 |
| 8.8 | Licenses | 204 |
| 9. | Common Actions | 207 |
| 9.1 | Output Options | 208 |
| 9.2 | Resequencing Items | 209 |
| 9.3 | Replacing Resources, Library Items, Departments, Locations, Customization List Items | 209 |
| 9.4 | Reviewing and Reverting History | 210 |
| 9.5 | Selecting Resources for the TPP, TCCD, and Skills | 211 |
| 9.6 | Using the Text Editor | 212 |
| 9.7 | Viewing Slides | 217 |
| 9.8 | Working with Business Rules | 218 |
| 9.9 | Working with Comments | 218 |
| 9.10 | Working with Flags | 220 |
| 10. | Customizations | 225 |

Table of Contents

| | | |
|--------------|-------------------------------|------------|
| 10.1 | Lists | 227 |
| 10.1.1 | Resource Sub-Categories | 228 |
| 10.1.2 | Proficiency Levels | 229 |
| 10.1.3 | Task Analysis Content | 231 |
| 10.1.4 | Schedule Event Types | 233 |
| 10.1.5 | Comments | 235 |
| 10.1.5.1 | Statuses | 235 |
| 10.1.5.2 | Priorities | 236 |
| 10.1.6 | Before Text | 237 |
| 10.1.7 | Intervention Types | 239 |
| 10.1.8 | Status of Training | 240 |
| 10.1.9 | Types of Training | 241 |
| 10.1.10 | Test Items Delivery | 243 |
| 10.2 | Business Rules | 244 |
| 10.3 | Configuration | 245 |
| 10.4 | Default Text | 247 |
| Index | | 253 |

This page is intentionally left blank.



Welcome

1 Welcome

LEAD is a learning event authoring suite for learning analysts, instructional designers, and curriculum developers. It is a mature and comprehensive solution from training needs analysis through content and assessment design and development. LEAD provides links from:

- Performance requirements, to task analysis skills, to learning objectives, and from there to storyboards for IMI content, as well as instructor and participant content, and assessment test items.
- Resources to learning events, and to specific pieces of content.





Links make it easy for you to manage and make updates to your learning content.

About this documentation

This document is designed both as a training aid in using LEAD and as an ongoing reference while you are working in LEAD. You can skim it for easy reference, work through it systematically for in-depth knowledge, and refer to it for more information whenever you need.

What has changed in the LEAD User's Manual For Version 2.0:

- Initiatives can be exported from one LEAD instance, and imported in another LEAD instance.
- [Comments](#)¹²¹⁸ can be added to most initiative screens. The [Status](#)²³⁵ and [Priority](#)²³⁶ fields can be customized for your organization. You can include comments on the [Output Options](#)²⁰⁸ screen for initiative outputs that come in PDF format. You can also output *All Comments* for a selected initiative from the [Implement](#)¹⁵⁴ tab.
- *Resource Selection* screens (for [single](#)¹⁴⁴ resource selection, [multiple](#)²¹¹ resource selections for the TNA/TMD and skills, and [multiple](#)¹⁴⁰ resource selections for sheets) now display all resources that have been cited in the initiative and not just those listed on the TNA or TMD *Resources* lists.
- *Cancellation TNAs* can now be easily distinguished from other TNAs on the *Analysis* tab.
- TNAs can change *TNA Type* when they are created.
Note: You can have only two TNAs active at any time (one *New*, *Modification*, or *Revision TNA Type* and one *Cancellation TNA Type*). you can have as many approved TNAs as needed.
- TO levels (i.e. lessons) can easily be moved between module levels in the same initiative, using [Copy](#)¹¹⁵ / [Paste: Move](#)¹¹³.
- [Cited Sheet](#)¹³⁸ screen has been added listing the sheets that have been created for a table of contents item and whether the sheets have not been cited in an element.

- [Slide Viewer](#)²¹⁷ can be used to view the slides of an IMM resource with an associated PowerPoint file in LEAD without having to download the file.
- [Multiple resources](#)¹⁴⁰ can be selected on for sheets and performance job sheet test items at the same time on the tabs that list resources.
- Resources can be selected for the following sheet tabs:
 - *Assignment Sheet - Study Questions*
 - *Job Sheet - Self-Test Questions*
 - *Problem Sheet - Problem*
- Initiative output changes:
 - Bookmarks have been added to the TNA, TMD, TDD, and Storyboard PDFs.
 - File names are now included in the *Media* folder for IMM files that output as part of a package on the [Implement](#)¹⁵² tab.
- [Replace](#)²⁰⁹  is now also available for *Resources*, *Library* items, *Departments*, *Locations*, and *Customizations* > *List* items.
Note: You will only see [Replace](#) , when you have the *Replace* privilege as part of your role.
- An *IETM Extraction File* can be generated for any IETM stored in LEAD.
- *Missing File Resources* report has been added for both [IETM](#)¹⁶⁶ and [IMM](#)¹⁶⁸ resources that will list all IETMs with a *Comparison File* that is listed with the IETM but cannot be found on the server and all IMM with an *Associated File* that are listed with the IMM but cannot be found on the server. You can also run the report for a specific initiative from the [Resource Management](#)³² screen.
- Likewise, the *All Resources* reports have been updated for [IETMs](#)¹⁶⁵ and [IMMs](#)¹⁶⁷ to indicate any missing files that are associated with a listed resource.
- The *Unused Resources* report has been renamed to [Uncited Resources Report](#)⁴⁸.
- *Login History* report is now available on the *Reports* tab.
- *Related Materials* and *All [selected item]* reports are now available for *Library* items, *Departments*, *Locations*, and *Customizations* > *List* items. A *Report* tab has been added for the *Customizer* to be able to output the *Customizations* > *List* items reports.
- *Locations* can be associated to a different department at any time and not just when you first create the location.
- [Copy](#)²⁰⁰  a user is now available, as well as *Changing the Password*  of a user to a either the automatically generated password or a manually entered password. You can

also *View* the details of a user's role from the *User Detail* screen. All changes to a user (including creation and deletion) are logged in the [System Log](#)²⁰².

- [Enable COI Item Level In-Use](#)²⁴⁵ configuration setting has been added to the *Program* group to allow you to choose whether to use the traditional LEAD in-use functionality or have the in-use setting cover the entire Table of Contents item.


For Version 1.9.3:

- Added a field to the *System Log Detail* screen to show the *Program Location* of the error.
- [Storyboard](#)¹⁴³ can be output for any table of contents item on the *Develop* tab (except for *Overview* and *Summary*).
- [Overview or Summary](#)¹³¹ *Instructor Guide* can be output for any *Terminal Objective Level*.


For Version 1.9.2:



- Expanded information on the [Font Size](#)²¹³ selection for the *Text Editor*.

For Version 1.9.1:

- *Login History*  can be viewed for any user by selecting a user on the *Admin* > [Users](#)²⁰⁰ screen.
- [Configuration](#)²⁴⁵ entries have been grouped and an *Explanation* has been added to help you customize LEAD settings.
- A new [Deleted Users Can Be Restored](#)²⁴⁵ configuration setting has been added to allow you to choose whether a deleted user can be re-activated or not.

For Version 1.9:

- *Expand* () functionality has been added to screens with a tree structure to allow you to open or expand more than one item in the tree structure at once. This includes the:
 - [Competencies](#)¹⁵⁸ screens.
 - Initiative screens on the [Analysis](#)²⁸, [Design](#)⁷⁶, and [Develop](#)¹²⁵ tabs.
 - [IETM Selection](#)¹⁴⁵ screen.
- Deletion functionality has been updated:
 - *Secondary Deletion* screen has been added to when deleting archived initiatives, a [Modification TNA](#)³⁴ on the *Analysis* tab, [table of contents items](#)¹¹³ on the *Design* tab, and all *Resources* tabs: [Consumables](#)¹⁶⁴, [IETMs](#)¹⁶⁶, [IMM](#)¹⁶⁸, [Publications](#)¹⁷⁰, [Software](#)¹⁷², and [Tools/Equipment](#)¹⁷⁴.
 - *Undo* functionality has been added when deleting items on the *Admin*, *Library*, and *Customizations* tabs, as well as various items on the *Analysis*, *Objectives*, and *Develop* tabs for initiatives. The length of time that the *Undo* button stays on the screen can be edited using the *Deletion Undo Interval In Seconds* entry on the *Customizations* > [Configuration](#)²⁴⁵ screen.

- [Output Options \(Print Preview Options\)](#)²⁰⁸ screen has been added to more screens, including *Cited Resources*, *Resource Management*, *TNA / TMD > Training Data / Initiative Locations > Resources* screens, and the *Resources* screens.
- *Library* items can be created from the selection screens in the *Task Analysis*:
 - [Conditions and Standards](#)⁷⁰.
 - [KSAs](#)⁷⁰.
 - [Interventions](#)⁷⁰.
- Initiative changes:
 - [Assessment Package](#)¹⁵⁴ can be generated separately from the *ILT Package* on the *Implement* tab.
 - *Copy* functionality has been added, allowing you to create initiatives from any existing initiative.
 - *Copy/Paste* functionality has been added to the [Task Analysis](#)⁶⁰, including [Jobs](#)⁶¹, [Duties](#)⁶³, [Tasks](#)⁶⁶, [Subtasks](#)⁶⁷, and [Steps](#)⁶⁹, as well as [EO levels](#)¹¹⁸ (e.g., sections can be copied/moved/duplicated to another [TO level](#)¹¹⁵, e.g., lesson), and [Elements](#)¹³⁶.
 - Flags can be removed from resources listed on the *TNA / TMD > Training Data > Resources* screen using the [Explain Flag](#)²²⁰ screen.
 - Select test items (*Essay Question*, *Fill-in-the-Blank*, *Multiple Choice*, *Short Answer*, *True/False*, and *Two-Column Matching*) now have the ability to have a file associated with the stem of the test item, allowing you to display a graphic, other IMM, or another resource with the stem.
 - *Practice* test items can output at any Table of Contents level for review or maintenance.
 - Select a *Sheet* to preview an individual sheet output, as well as a *Related Materials* report that shows where the selected sheet is cited or used.
 - Updates to the [Team Members](#)²⁹ screen to allow you to edit the team members and owner at any time, regardless of the *State* or *Status* of the initiative.
 - [User Created](#)²²³ flag  has been added to distinguish between the different user actions. The [User Edited](#)²²² flag  has not been changed.
 - *Uncited Resources Report* and *Unlisted Resources Report* have been added to the *TNA / TMD > Training Data > Resources*⁴⁸ and *Initiative Locations > Resources*⁵⁷ screens, available via the *Output Options* screen.
- Resource changes:

- Resources can be created from the selection screens on the [Analysis/Design](#)¹⁴⁴ tabs, as well as on the [Develop](#)¹⁴⁴ tab.
- [IETM Selection](#)¹⁴⁵ screen allows for more options to create citations on the *Develop* tab.
- *All Resources* reports have been updated for IETMs and IMM to include any files names that are associated with a listed resource.
- [Unused Resource Management](#)¹⁷⁵ screen has been added, allowing you to manage all resources not used or cited in LEAD.
- [Login History](#)²⁰ screen has been added to allow each user to view their own login history.
- User management has been updated:
 - *Reviewer* license has been added as an option to allow for *View* and *Generate* access to users with a [Reviewer](#)²⁰² role.
 - *Restricted Users* have been added to allow you to have users that can only see/access the initiatives where they are listed on the *Team Members* screen, either as part of the team or as the initiative owner. This change includes:
 - A *Restricted Access* checkbox on the *Users* screen after the *Role* drop-down to give a user restricted access.
 - The addition of the *Default Restricted Access for New Users* entry on the *Customizations* > [Configuration](#)²⁴⁵ tab, which when active ensures that the restricted access checkbox is checked automatically for all new user account requests.
 - The addition of a new *Restricted Users and their Initiatives* report on the [Reports](#)¹⁹³ tab that lists all restricted users and their initiatives.
 - *Email Admins on User Account Change* has been added to the system configuration settings (AppSettings.xml - those are not editable on editable on the *Customizations* tab). Setting this to Yes will email the administrators listed in the *System Admin Email Address* entry on the *Customizations* > [Configuration](#)²⁴⁵ tab whenever a user account is edited, made active, deactivated, reactivated, locked-out, or deleted.

For Version 1.8:

- [Resource Management](#)³¹ screen has been added, allowing you to manage all resources used or cited in the initiative.
- [Cited Resources](#)¹⁴⁶ screen has been added, allowing you to manage all resources used or cited anywhere below a selected table of contents item on the *Develop* tab.
- [System Logs](#)²⁰² screen has been added, allowing you to review and export any error messages that you may have seen to the LEAD support team for review and possible action.

- *Output Options (Print Preview Options)* screen has been added, allowing you to select the delivery methods of the EO levels for the IG, PG, and assessment test items, for a selected table of contents item on the *Develop* tab, as well as the *Printed Guides* and *Training Packages* (except for the *SCORM Package*) on the *Implement* tab.
- Icons to change the *State* of the initiative from *Active* to *Inactive* and from *Inactive* to *Active* have been updated on the *Initiatives > Initiatives* screen.
- [Business Rules](#)²⁴⁴ have been added that can be customized to run when you save a change in *Status* or *Lock* items of the initiative or *Export* the initiative. You can then review the results on the [Business Rules Results](#)²¹⁸ screen and make most edits straight from that screen.
- *Comparison File* support has been added for IETMs, allowing you to upload a comparison file even to an approved IETM.
- *Performance Test Items* have been updated with a new *Setup Instructions* tab, allowing you to describe what the instructor or proctor needs to do to set up for the test, and a new *Pass/Fail* option for *Rubric* entries.
- All Test Items have been updated with a new *Reference* tab, allowing you to list the resources that form the basis of the test item.

For Version 1.7:

- New test item(s) have been added, along with a new *Test Item Delivery* field for all test items to denote whether a test item is an open book or closed book test item.
 - *Performance Job Sheet* - including a grading rubric.

For Version 1.6:

- [System Announcements](#)¹⁷ are now available to read from any screen using the icons in the header.
- *Two-Column Matching* test item has been added.
- [Storyboard](#)¹⁴³ screen now uses text and resource citations.
- *Design Considerations* now uses text citations at the *Course*, *Module*, *TO*, *Overview/Summary*, and *EO* levels, as well as for *Assessments*.

1.1 Login to LEAD

Use the *User ID* you were provided (usually first name.last name) and the password you created when you requested the account to login to LEAD.

Occasionally, when the LEAD software code has been updated, the first user to login after the update will be asked to update the database. If you are not comfortable doing so, please let a

LEAD administrator or the IT support person for LEAD know, so that they can perform the update, after backing up the database.

The image displays the login interface of the LEAD application. It is divided into two main sections. The left section, titled 'Login' with a lock icon, contains a 'User ID' field with a person icon, a 'Password' field with a magnifying glass icon and a toggle for visibility, a 'Forgot Password?' link, a blue 'Login' button, and a green 'Request an Account' button. The right section, titled 'Announcements' with a bell icon, is currently empty.

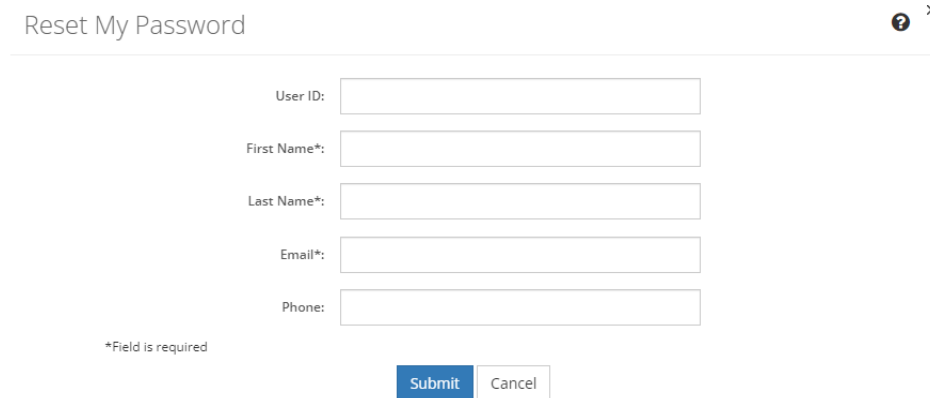
Figure 1: Login Screen

1.1.1 Request an Account

The easiest way to get an account to use LEAD is to select *Request an Account* on the login screen for your organization's instance of LEAD. Fill out your information on the screen and select *Submit*. LEAD notifies the LEAD administrator of your request automatically.

1.1.2 Forgot Password

If, at any point, you forget your password, select the *Forgot Password?* link on the *Login* screen and complete the fields below. An automatic email to the LEAD administrator will start the process of having your password reset. If the information you supplied matches an existing account, you will receive an email with a temporary password automatically. Otherwise, you'll have to wait for a LEAD administrator to review your request and send you a temporary password. Alternatively, you can ask a LEAD administrator to reset your password.



The image shows a 'Reset My Password' form. At the top, the title 'Reset My Password' is followed by a help icon (question mark in a circle) and a close icon (X). The form contains five input fields: 'User ID:', 'First Name*:', 'Last Name*:', 'Email*:', and 'Phone:'. Below the 'Email*' field, there is a note '*Field is required'. At the bottom of the form, there are two buttons: 'Submit' (in blue) and 'Cancel' (in white with a grey border).





Figure 2: Reset My Password Screen

1.1.3 Single-Sign-On

When it comes to Single-Sign-On (SSO) in LEAD, the system administrators have two options on the [Configuration](#) ²⁴⁵ screen: *Enabled* and *Required*. In an SSO environment, you will be logged into LEAD automatically, using your system login, no user ID or password required. Instead of a *User ID* consisting of your first name.last name, your *User ID* contains your system ID, or for CAC users, your DoD ID.

1.2 Using LEAD

Some general notes on how to use LEAD:

- Any time you want to get back to the *Dashboard*, click on LEAD in the top left of the header bar (the orange bar).
- If you need more room for your content, you can minimize the left-hand menu by clicking on the three-bar icon  next to LEAD in the header bar. Selecting the three-bar icon again will maximize the menu again.
- To view any system announcements, select the *Announcement* icon that displays between your user name and the help icon in the header bar. Once you've reviewed the announcements, you can close the pop-up. There are three types of *Announcement* icons:
 -  - there is a new announcement to read.
 -  - there are previously read announcements that are still active.
 -  - there is a problem with the license for LEAD.

- The area of the screen that displays a tree structure can also be enlarged by clicking and dragging the bottom right corner of the tree structure window (or frame). You will find re-sizeable tree structures on the following screens:
 - *Initiatives > Analysis*
 - *Initiatives > Design*
 - *Initiatives > Develop*
 - *Competencies > O*Net*

1.3 Help

When you select the *Help* icon on the top right of the screen, you get a drop-down menu.

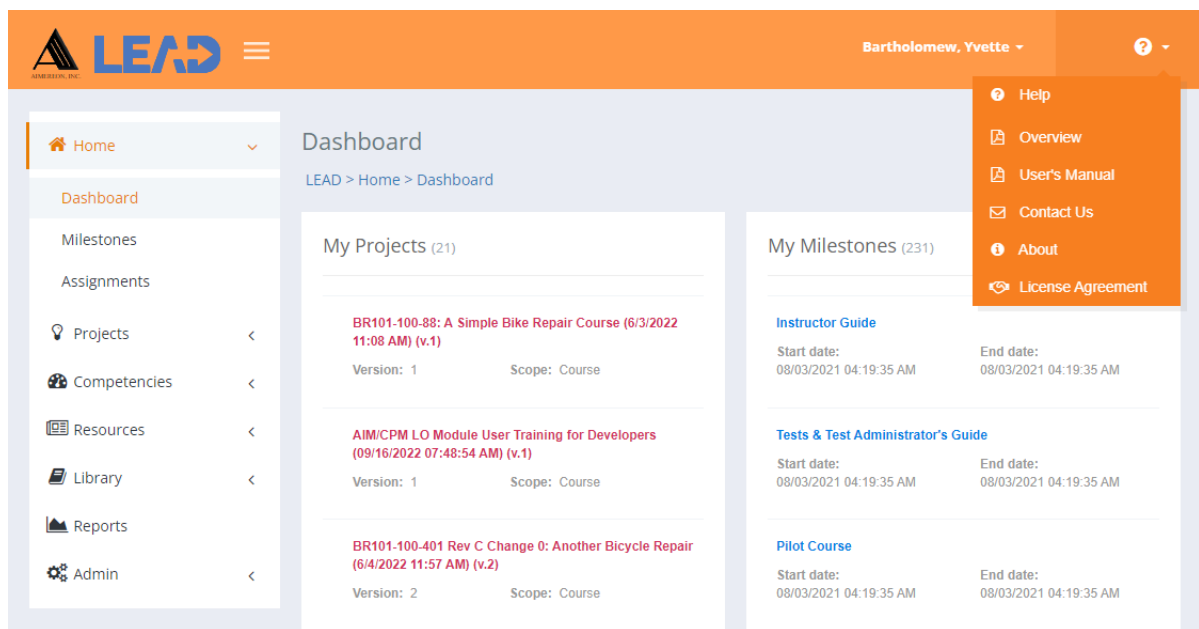


Figure 3: Help Menu

Choose:

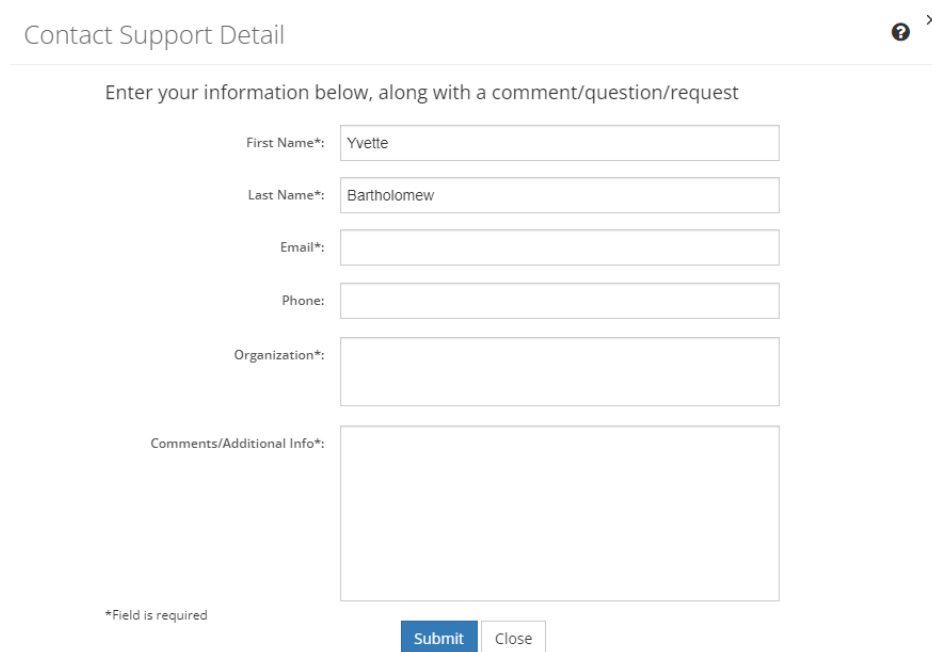
- *Help* to open help for the current screen in a new tab of your browser.
- *Overview* or *User's Manual* to open the PDF.
- [Contact Us](#) ¹⁹ to provide us with your feedback comments, questions, or requests. If you are logged in, the form will pre-fill your contact information from your user profile.
- *About* to review information about LEAD, including the version and build of LEAD. Select X at the top right of the pop-up to close the pop-up.

- *License Agreement* to review the license information. Select *X* at the top right of the pop-up to close the pop-up.

To review help for a pop-up screen, select *Help*  next to the *X* on the pop-up screen. This will open help for the current pop-up screen in a new tab of your browser.

1.3.1 Contact US

When you select the *Contact Us* option under the *Help* drop-down menu, you get a pop-up screen to provide us with your feedback comments, questions, or requests. If you are logged in to LEAD, the form will pre-fill your contact information from your user profile.



Contact Support Detail

Enter your information below, along with a comment/question/request

First Name*: Yvette

Last Name*: Bartholomew

Email*:

Phone:

Organization*:

Comments/Additional Info*:




*Field is required

Submit Close

Figure 4: Contact Us

1.4 [Your User Name]

When you select your user name in the top right of the screen, you can select:

- [My Profile](#)  to view and edit your account information and preferences.
- [Change Password](#)  to change your password.
- [Login History](#)  to view your login history.
- *Log Out* to close your session in LEAD. Remember to close your browser, too.

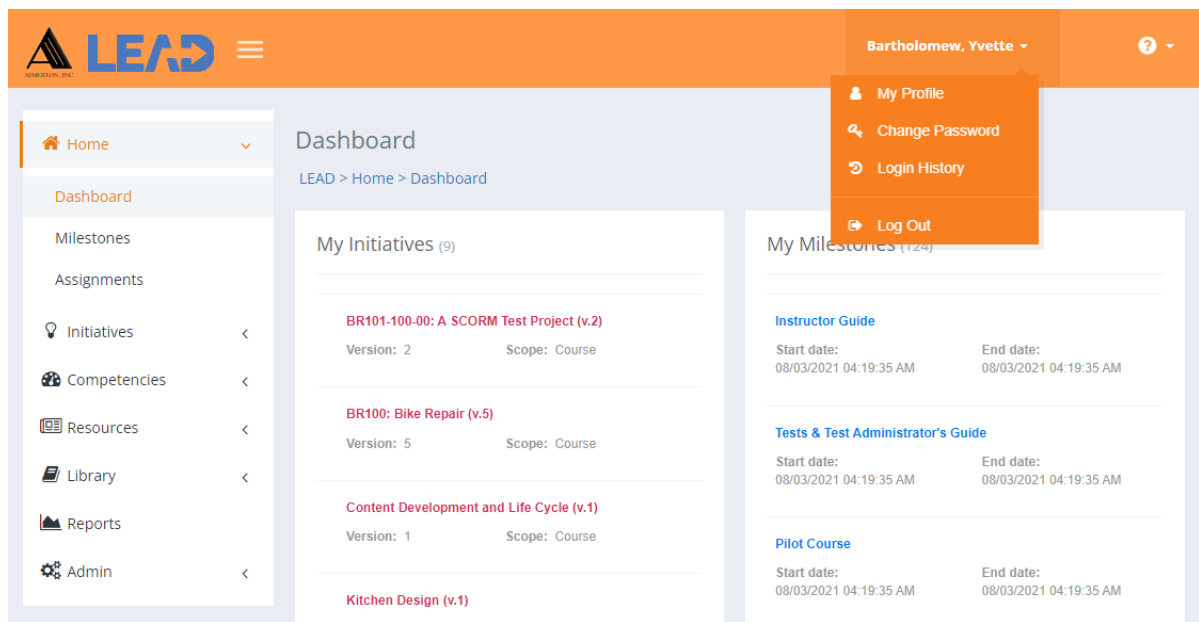


Figure 5: [Your User Name] Menu

1.4.1 My Profile

On the *My Profile Detail* screen, you can review or edit your account information and preferences. Only a LEAD administrator can edit fields marked "*(not user editable)*". Select *Edit* to make changes to the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.

1.4.2 Change Password

On the *Change Password* screen, you can change your existing password to a new password to use when you login to LEAD. Enter your current password and your new password twice, select *Save* to change the new password, or select *Cancel* to return to the previous screen.

1.4.3 Login History

On the *Login History* screen, you can review all the times you have logged into LEAD.



Home > Dashboard

This chapter describes the dashboard that you can use to access your initiatives, milestones, and assignments in one place.

2 Home > Dashboard

On the *Dashboard* screen, you can view your [initiatives](#)²², any assigned [milestones](#)²² that are not in completed status, and a list of your [assignments](#)²².

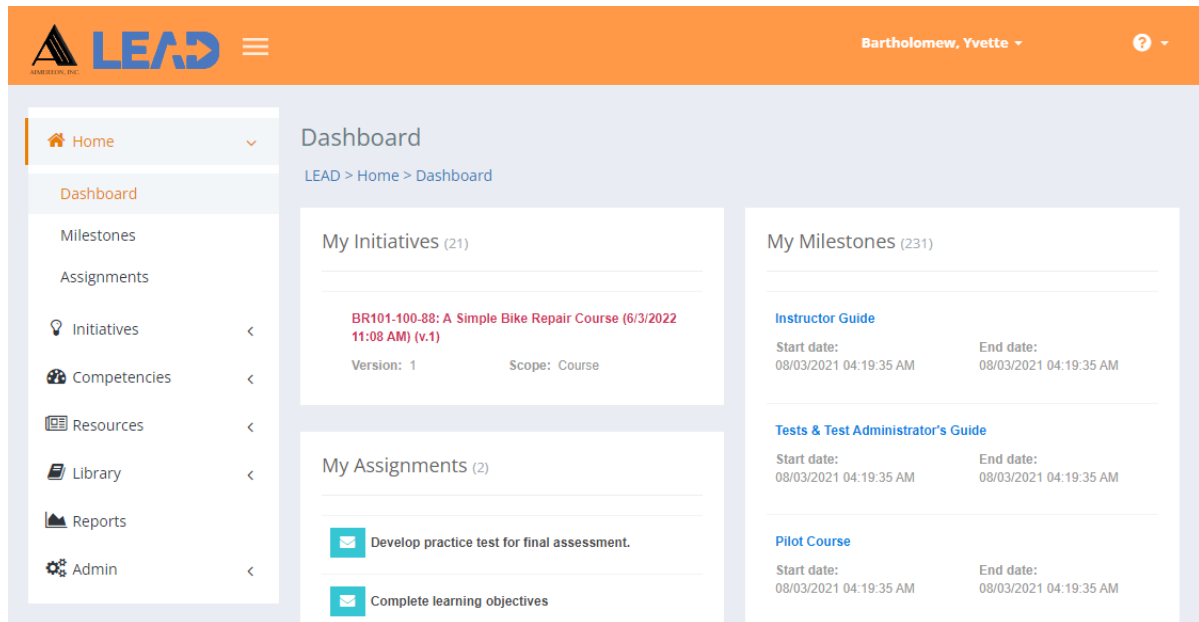


Figure 6: Dashboard

- Selecting any Initiative will open that initiative in the *Initiatives* > [Analysis](#)²⁸ screen.
- Selecting a Milestone will open that milestone in the *Home* > [Milestones](#)²² screen.
- Selecting an Assignment will open that assignment in the *Home* > [Assignments](#)²³ screen.

2.1 Milestones

The *Milestones* screen lists your milestones, grouped by initiative. Unlike the *Dashboard*, this screen will show all milestones of your initiatives, regardless of *Status*, for all of your initiatives (a specific initiative is 'yours' when you are the owner or creator of the initiative, or when someone has added you as a team member to any initiative.) that have been assigned to you. You can also create Self-Assigned Milestones, by selecting [+ New](#).

Figure 7: Milestones

From this screen you can select a milestone and then use the icons in each row in the *Actions* and *Delete* columns to:

- **View** the detailed information of the milestone.
- **Edit** the milestone information.
- Select [Show History](#) to review the changes made to the milestone, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- **Delete** a self-assigned milestone - delete initiative-based milestones on the *Initiatives > Analysis > Training Needs Analysis > Milestones* screen (if the TNA is not approved). Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

2.2 Assignments

The *Assignments* screen lists your assignments, grouped by initiative. Unlike the *Dashboard*, this screen will show all your assignments (by initiatives, if related to any initiative), regardless of *Status*.

You can also create self-assigned assignments, by selecting

LEAD > Home > Assignments

Find:

[+ New](#)

| Assignment Title | Actions | Delete |
|-----------------------------------------------------------------|---------|--------|
| BR101-100-1-24: Bicycle Repair (v.1) | | |
| Complete learning objectives | | |
| BR101-100-401: Another Bicycle Repair (6/4/2022 11:57 AM) (v.2) | | |
| Develop practice test for final assessment. | | |

Page size: 12 Items 1 to 2 of 2 total

Figure 8: Assignments

From this screen you can select an assignment and then use the icons in each row in the *Actions* and *Delete* columns to:

- *View* the detailed information of the assignment.
- *Edit* the assignment information.
- Select [Show History](#) ²¹⁰ to review the changes made to the assignment, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete* a self-assigned assignment - delete initiative-based assignments on the *Initiatives > Analysis/Design > Initiative Management > Assignments* ³⁰ screen. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.



Initiatives

This chapter is all about initiatives (or learning events), how to analyze, design, develop and implement them.

3 Initiatives

Initiatives are the main reason for using LEAD. An initiative is a learning event, like a course or workshop, which is created to close an identified performance gap. LEAD supports the development of several types of learning events (see [Scope](#)²⁶ below). LEAD uses the ADDIE (Analysis, Design, Develop, Implement, and Evaluate) instructional design process to develop and maintain initiatives. The main tabs under *Initiatives* mirror that process.

| No | Initiative ID | Initiative Title | Scope | State | Version | Status | Actions |
|----|---------------|---------------------------------------------------------|--------|--------|---------|------------|---------|
| 1 | BR101-100-101 | Bicycle Repair From AIM I - New IETM (3/7/2022 9:09 AM) | Course | Active | 1 | Approved | [Icon] |
| 2 | BR100 | Bike Repair - AIM LOM (3/23/2022) | Course | Active | 5 | Incomplete | [Icon] |
| 3 | | Content Development and Life Cycle | Course | Active | 1 | Incomplete | [Icon] |
| 4 | | Kitchen Design | Module | Active | 1 | Incomplete | [Icon] |
| 5 | L-100-200 | Life Skills | Manual | Active | 2 | Complete | [Icon] |














Figure 9: Initiatives > Initiatives

Unlike the *Dashboard*, this screen will show all the initiatives in LEAD, depending on your *Filter* selection, as well as your role and level of access, of course. You can use [Find](#)²⁶ to look for a specific initiative.

- Add a **+ New** initiative to the existing list by selecting + New.
- **Upload** a LEAD initiative.
- **Search** for an initiative.

When you select any initiative on this screen you can select one of the subtabs under the *Initiatives* tree on the left to open that initiative in that subtab, or you can:





- Create a **New Version** of an approved initiative.
- Change the *State* of a selected initiative.



- **Export**  the selected initiative regardless of *State* or *Status* to move it to another LEAD instance or to archive the initiative and store the export file that is generated, and then delete the initiative in LEAD.
- Make a **Copy**  of a selected initiative.
- Select **Explain Flag**  to review the reasons the initiative has been flagged.
- **Lock**  the initiative to prevent any user from making changes without first unlocking  the initiative.
- **View**  the initiative versions.
- **View**  the detailed information of the initiative.
- Approve the initiative by selecting **View**  and then **Approve**.
- Comment on the initiative by selecting **View**  and then **Comment** .
- **Edit**  the initiative information.
- Select **Show History**  to review the changes made to the initiative information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- **Delete**  an archived initiative.

You can click on the column headers of each table to sort the entries by that column. Clicking on a column header again will reverse the sort. Clicking on the column header a third time will remove the sort. Small arrows in the column header let you know which way the data is currently sorted.

3.1 Work with Initiatives

On the *Initiatives > Initiatives* screen, you can:

- Add a **+ New** initiative to the existing list by selecting **+ New**.
- Create a **New Version**  of an approved initiative.
- Change the *State* of a selected initiative.
- **Copy**  an initiative.
- **View**  the detailed information of the initiative.
- Approve the initiative by selecting **View**  and then **Approve**.

- *Edit*  the initiative information.
- *Delete*  an archived initiative.

3.2 Analysis

On the *Analysis* tab, you can manage your [initiative](#)²⁹, complete the [Training Needs Analysis](#) and the [Task Analysis](#)⁵⁹. You can also generate the analysis documents under the [Documents](#)⁷² folder.

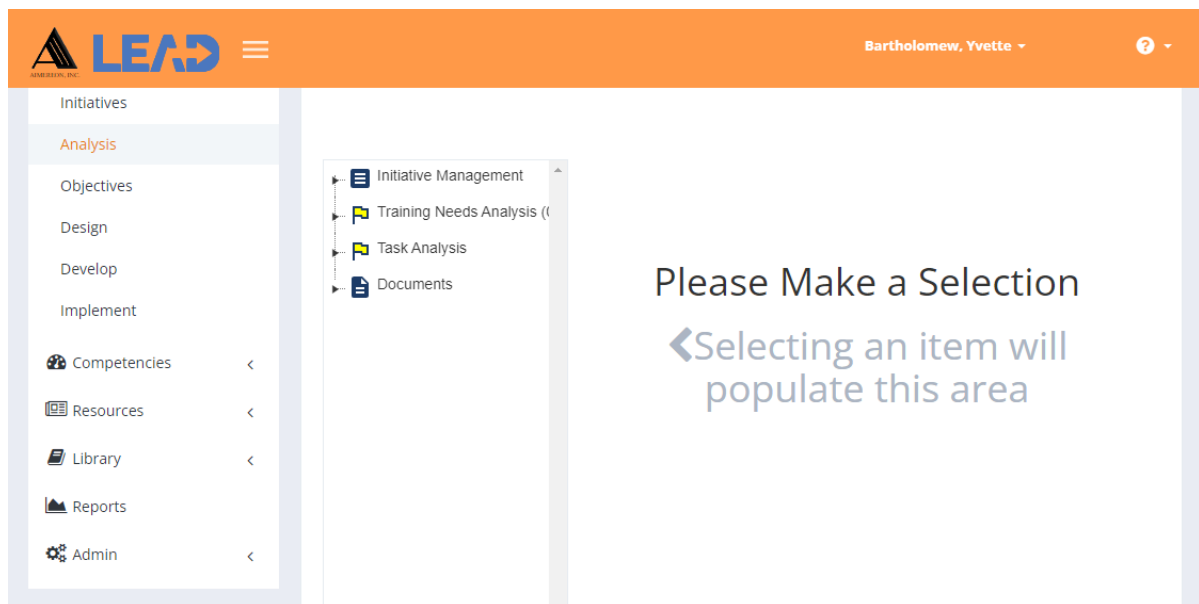




Figure 10: Initiatives > Analysis

On this screen:

- Use the tree structure to expand out the four main folders and get to the data you need to work with.
- To make more room to see items in the tree structure, click and drag the bottom right corner of the tree window (or frame).
- To make even more room, click on the three-bar icon  next to LEAD in the header bar to minimize the main menu to show only the icons. To see all of the menu items again, click on the three-bar icon again.
- Select a folder and then *Expand*  to open up the folders beneath the selected folder:
 - Selecting the [Initiative Management](#)²⁹ folder and then *Expand* opens up all the sub-folders.

- Selecting the [Training Needs Analysis](#)³³ folder and then *Expand* opens up all the sub-folders, including those under *Training Data* and *Initiative Locations*. Selecting *Training Data* or a specific *Initiative Location* and then *Expand* opens just that folder.
- Selecting the [Task Analysis](#)⁵⁹ folder and then *Expand* opens up the skill hierarchy down to the step level. Selecting any skill and then *Expand* opens just that skill down to the step level.
- Selecting the [Documents](#)⁷² folder and then *Expand* opens up all the available output options.

3.2.1 Initiative Management

When you click on the *Initiative Management* folder, you can view information about the initiative. You can access the *Initiative Management* folder from both the *Initiatives > Analysis* and the *Initiatives > Design* screens.

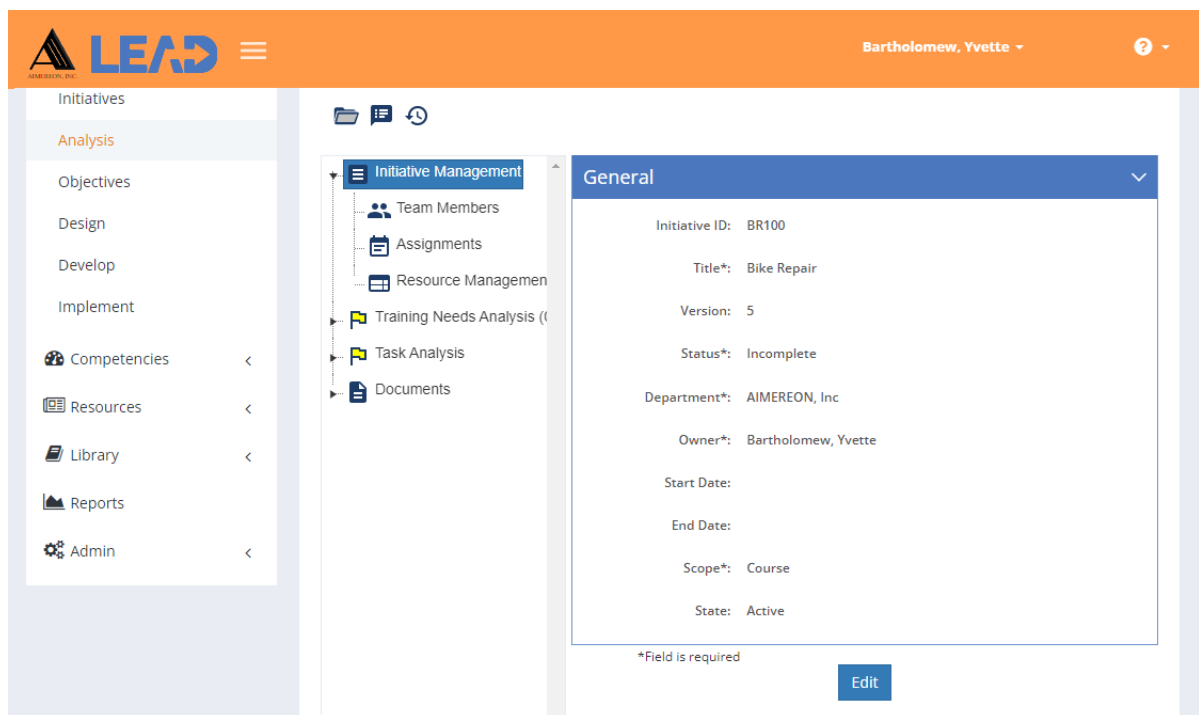


Figure 11: Analysis/Design > Initiative Management

3.2.1.1 Team Members

The *Team Members* screen lists the users currently assigned to the initiative. You can access this folder from both the *Initiatives > Analysis > Initiative Management* and the *Initiatives > Design > Initiative Management* screens.

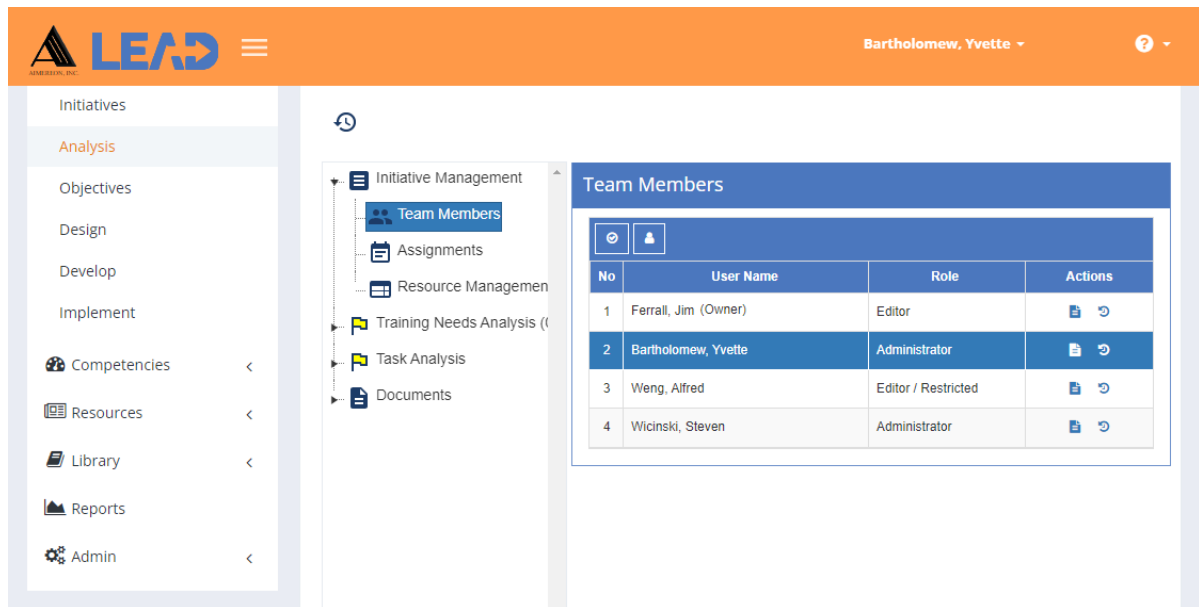


Figure 12: Initiative Management > Team Members

3.2.1.2 Assignments

The *Assignments* screen lists all the assignments that have been created for the initiative. You can access this screen from both the *Initiatives > Analysis > Initiative Management* and the *Initiatives > Design > Initiative Management* screens.

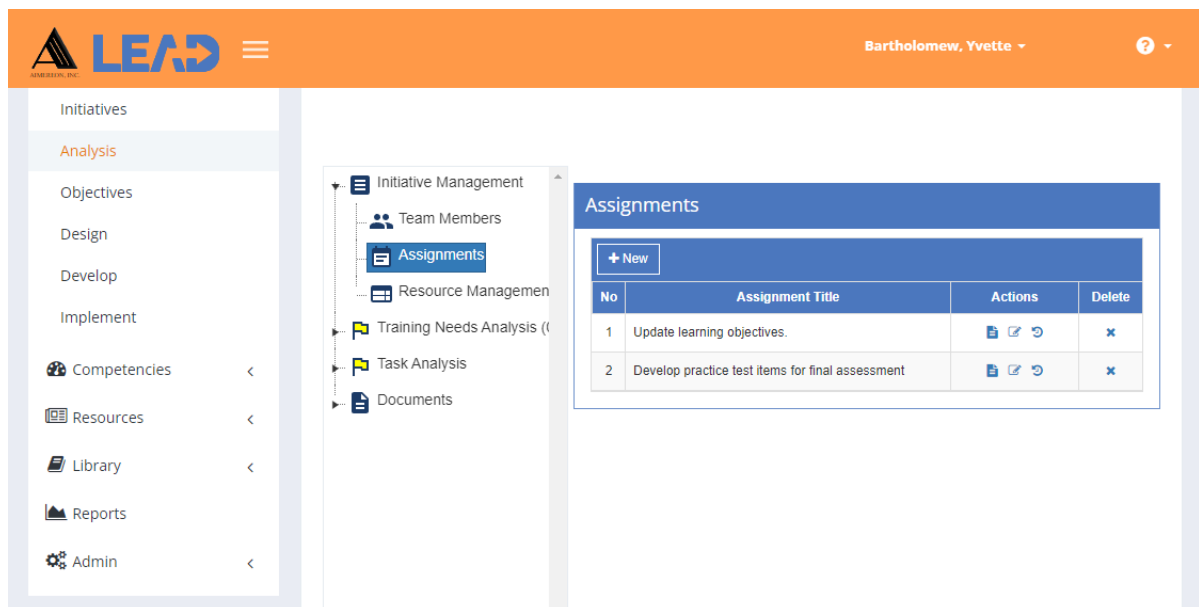






Figure 13: Initiative Management > Assignments

On this screen you can:

- Add a **+ New** assignment to the existing list by selecting + New.

- Select an assignment and:
 - View  the detailed information of the assignment.
 - Edit  the assignment information.
 - Select [Show History](#)  to review the changes made to the assignment, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - Delete  an assignment. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

3.2.1.3 Resource Management

On the Resource Management screen, you can review, view, and update any resources that are cited anywhere in the initiative. This includes resources cited in the:

- *TNA* or *TMD Resources* screen under the *Training Data* folder, or for a specific *Initiative Location*.
- *Task Analysis* for a *Task*, *Subtask*, or *Step*.
- And on the *Develop* tab:
 - *Sub-Elements: Page / Paragraph / Caution / Note / Warning*.
 - *Sheets*.
 - *Certain Test Items*.
 - *Storyboard*.
 - *Test Instructions*.

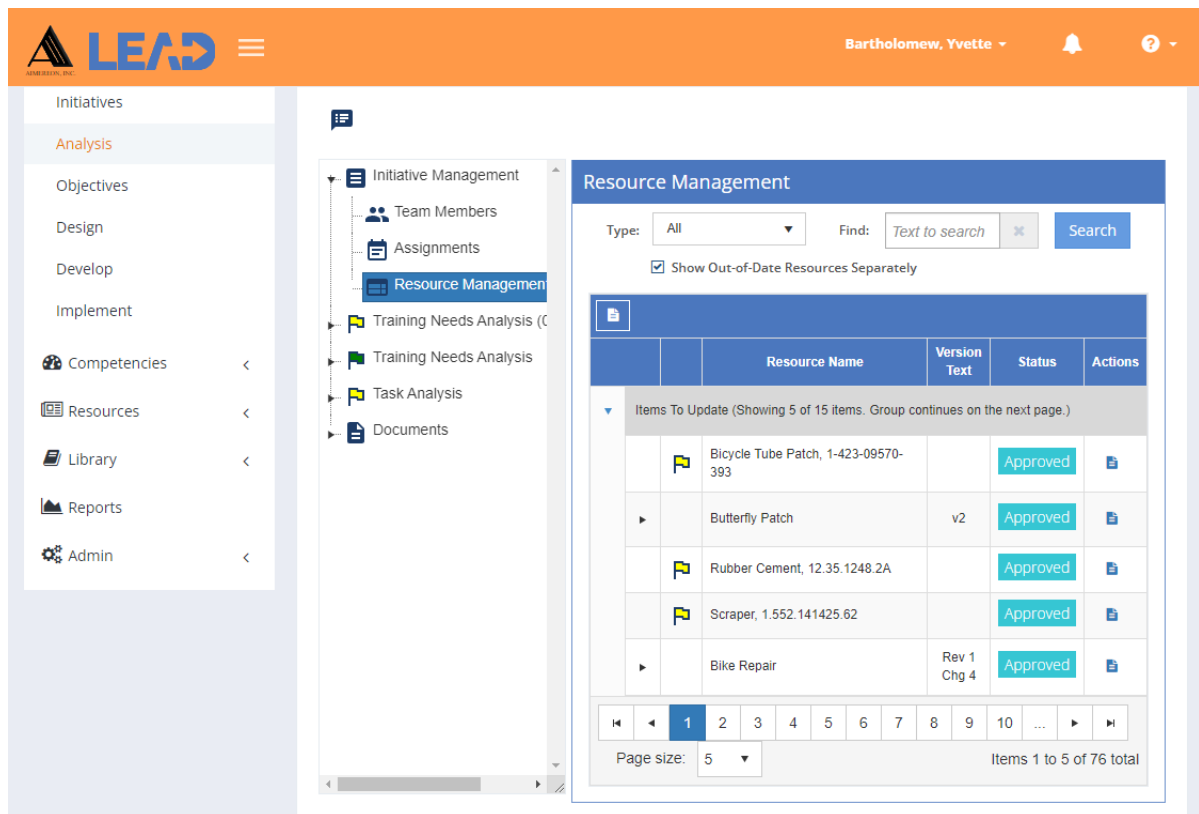










Figure 14: Initiative Management > Resource Management

On this screen:

- Select [View Comments](#)  to view, edit, and add to the comments about the listed resources.
- Use the *Type* drop-down to limit the list of resources to a specific sub-category, as set up on [Customizations](#)  screens.
- Enter a search term in the *Find:* field and select *Search* to list all resources that contain your search term on the screen. Select  to clear the search term and view all items again.
- Select the *Show Out-of-Date Resources Separately* check box to see those outdated resources at the top of the list grouped under: *Items to Update*.
- *Preview*  a spreadsheet listing *All* cited resources, or the *Missing File Resources* spreadsheet listing all IETMs with a *Comparison File* that is listed with the IETM but cannot be found on the server and all IMMs with an *Associated File* that is listed with the IMM but cannot be found on the server.
- View the different versions of a resource by clicking on the arrow ► in the first column.
- Select a resource and then *Preview*  to generate the:

- *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
- *Impact Report* that lists every place within the initiative where *any previous version* of the selected resource is cited or used.
- *All Resources* spreadsheet listing all cited resources.
- *Missing File Resources* spreadsheet listing all IETMs with a *Comparison File* that is listed with the IETM but cannot be found on the server and all IMM with an *Associated File* that is listed with the IMM but cannot be found on the server.
- Select a resource and then:
 - *Update*  to the latest version of a resource.
 - *View*  the resource information.
 - *Edit*  the resource information if the resource is not approved.
Note: This will update the resource everywhere it is used in LEAD.

You can click on the column header to sort the entries. Clicking on the column header again, will reverse the sort. Small arrows in the column header let you know which way the data is currently sorted.

3.2.2 Training Needs Analysis

The *Training Needs Analysis (TNA)* is the first step in any initiative, which seeks to determine whether a learning event is the right answer to close a performance gap on the job. That is, do you have new equipment that you need to train people on, or is there a gap between the performance standard and the actual performance you need to close, or do you need to develop a learning event for another reason?

In the folders/fields under the TNA, you can capture the reasons for the TNA under *Justification*, as well as information about the initiative, the *Target Audience*, and some overall training data. The TNA shares some information with the [Training Management Document](#)⁸¹ (as shown in the title for each area in this document) until the TNA is approved.

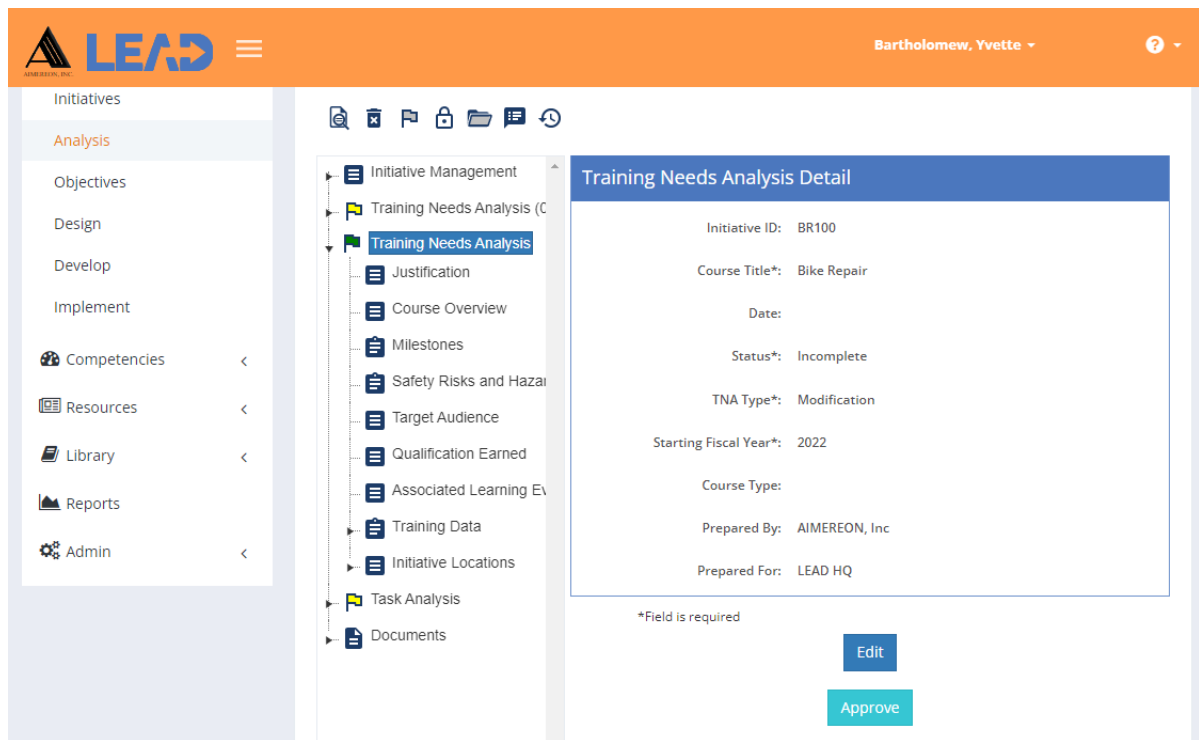











Figure 15: Analysis > Training Needs Analysis

On this screen, you can:





- View the information by selecting a *Training Needs Analysis* folder.
- Edit the information about the *Training Needs Analysis* and initiative.
- Approve the *Training Needs Analysis*.
- Create additional TNAs  to capture changes that occurred after the TNA was approved. You can create a new TNA, even if the initiative has not been approved.
Note: You can only have one unapproved Modification or Revision TNA and one unapproved Cancellation TNA at a time. You can have as many approved TNAs of any *TNA Type* as needed.
- Preview  the selected *Training Needs Analysis*.
Note: If a resource is missing in the output of the TNA or TMD, but is listed on the *Training Data* > [Resources](#) ⁴⁸ or *Initiative Locations* > [Selected Initiative Location] > [Resources](#) ⁵⁷ screen, check the *Required* quantity. If the *Required* quantity is set to 0, it will not output in the TNA or TMD.
- Delete  a *Training Needs Analysis*, if it is no longer needed. You cannot delete the primary TNA in the initiative.
Note: Once you've selected OK to the confirmation message, the *Training Needs Analysis Deletion* screen displays. Enter the title of the *TNA* to confirm the deletion.

Note: You can copy and paste the title from the screen into the field to make it easier on yourself. If you only enter a partial title, the *TNA* will not be deleted, and the *Training Needs Analysis Deletion* screen stays open, ready for you to try again.

- Select [Explain Flag](#)  ²²⁰ to review the reasons the *Training Needs Analysis* has been flagged.
- Lock  the *Training Needs Analysis* to prevent edits from taking place.
- Unlock  a locked *Training Needs Analysis* to allow edits to take place again.
- Expand  all sub-folders at once, including those under *Training Data* and *Initiative Locations*, to capture the information required for the TNA.
- Select [View Comments](#)  ²¹⁸ to view, edit, and add to the comments about the selected TNA.
- Select [Show History](#)  ²¹⁰ to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.1 Justification (TNA Only)

On the *Justification* screen, you can capture the reasons for the development of a learning event in the following fields:

- [Reference\(s\)](#)  ³⁵
- [Cost / Benefit Analysis](#)  ³⁵
- [Changes from Previous Version](#)  ³⁵
- [Impact If Not Approved](#)  ³⁵

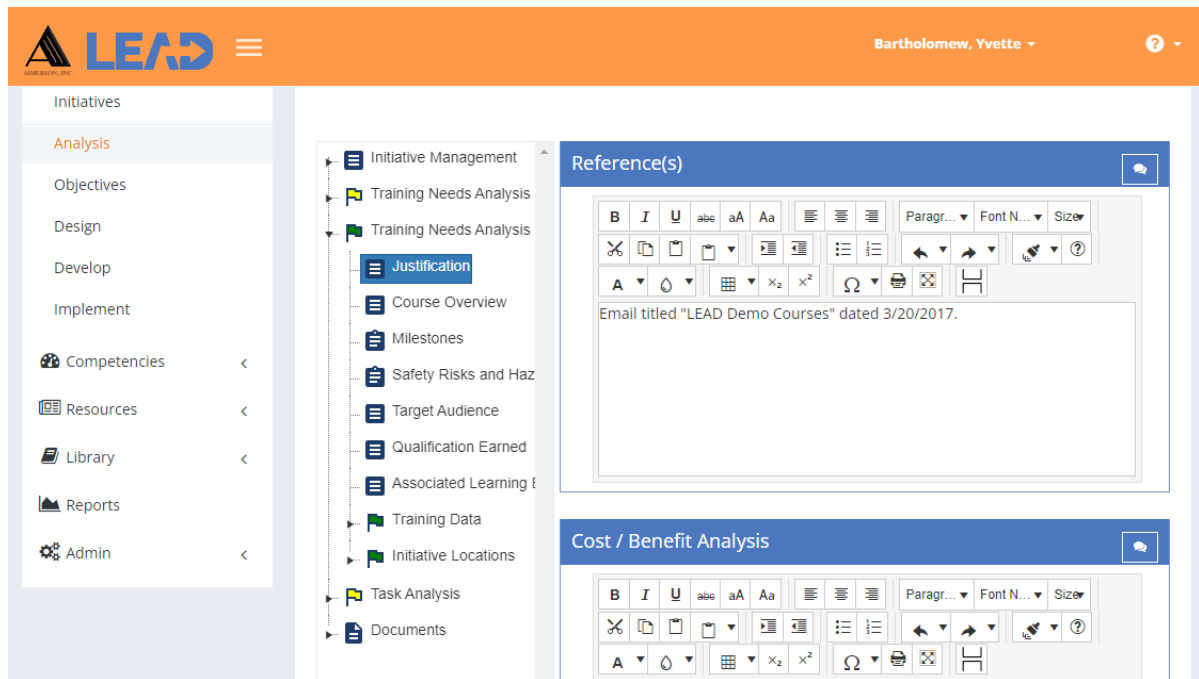



Figure 16: TNA > Justification

You can:

- View the information.
- Edit the information ([Editor Help](#))²¹². Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments for each tab.

3.2.2.2 Initiative Overview (TNA and TMD)

On the *Initiative Overview* screen, you can enter a description, or overview, of the proposed learning event that will close the performance gap.

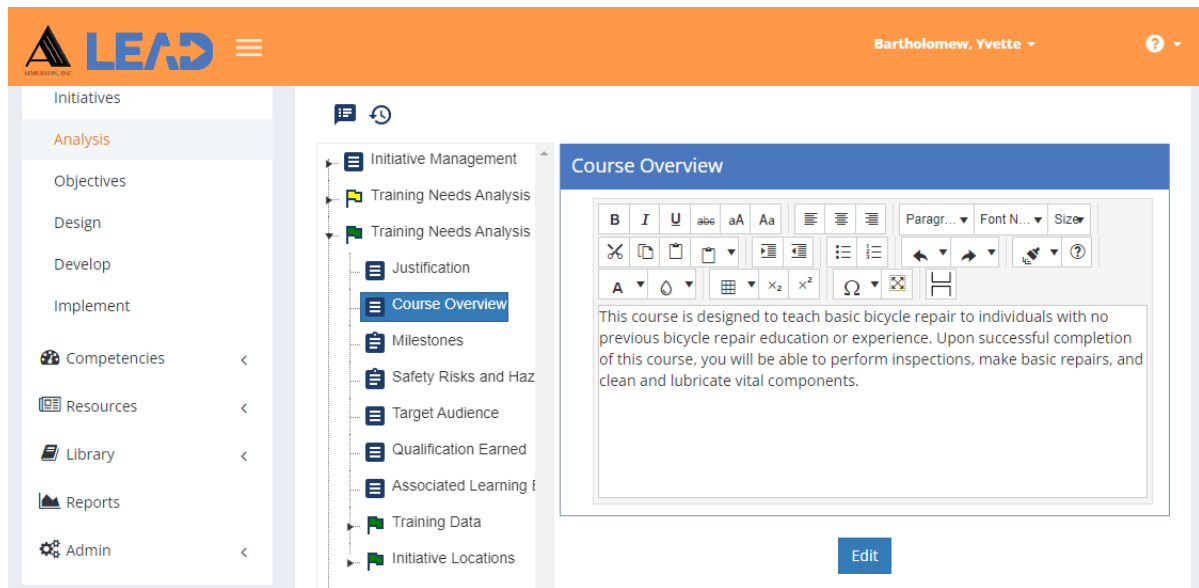




Figure 17: TNA/TMD > Initiative Overview

You can:

- View the information by clicking on the *Initiative Overview* folder.
- Edit the information ([Editor Help](#))²¹². Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.3 Milestones (TNA Only)

On the Milestones screen, you can work with the default milestones for the initiative.

| No | Milestone Title | Start Date | End Date | Actions | Delete |
|----|------------------------------------|------------|------------|---------|--------|
| 1 | Training Need Analysis | 03/23/2022 | 05/23/2022 | | |
| 2 | Training Management Document | 05/23/2022 | 12/23/2022 | | |
| 3 | Instructor Guide | 07/23/2022 | 03/23/2023 | | |
| 4 | Participant Guide | 07/23/2022 | 03/23/2023 | | |
| 5 | Tests & Test Administrator's Guide | 07/23/2022 | 03/23/2023 | | |
| 6 | Pilot Course | 03/23/2023 | 04/23/2023 | | |
| 7 | Post Pilot Report | 04/23/2023 | 05/23/2023 | | |
| 8 | Approval Letter | 06/23/2023 | 07/23/2023 | | |
| 9 | Implement Course | 07/23/2023 | 07/23/2023 | | |

Figure 18: TNA > Milestones

On this screen, you can:

- Select [View Comments](#) ²¹⁸ to view, edit, and add to the comments.
- Add a [+ New](#) milestones by selecting + New.

You can select a milestone and then use the icons in each row in the *Actions* and *Delete* columns to:

- *View* the detailed information of the milestone.
- *Edit* the milestone information.
- Select [Show History](#) ²¹⁰ to review the changes made to the milestone, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete* the milestone. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

3.2.2.4 Safety Risks and Hazardous Materials (TNA Only)

On the *Safety Risks and Hazardous Materials* screen, you can document any safety risks and hazardous materials that might be met or used during the delivery of the learning event.

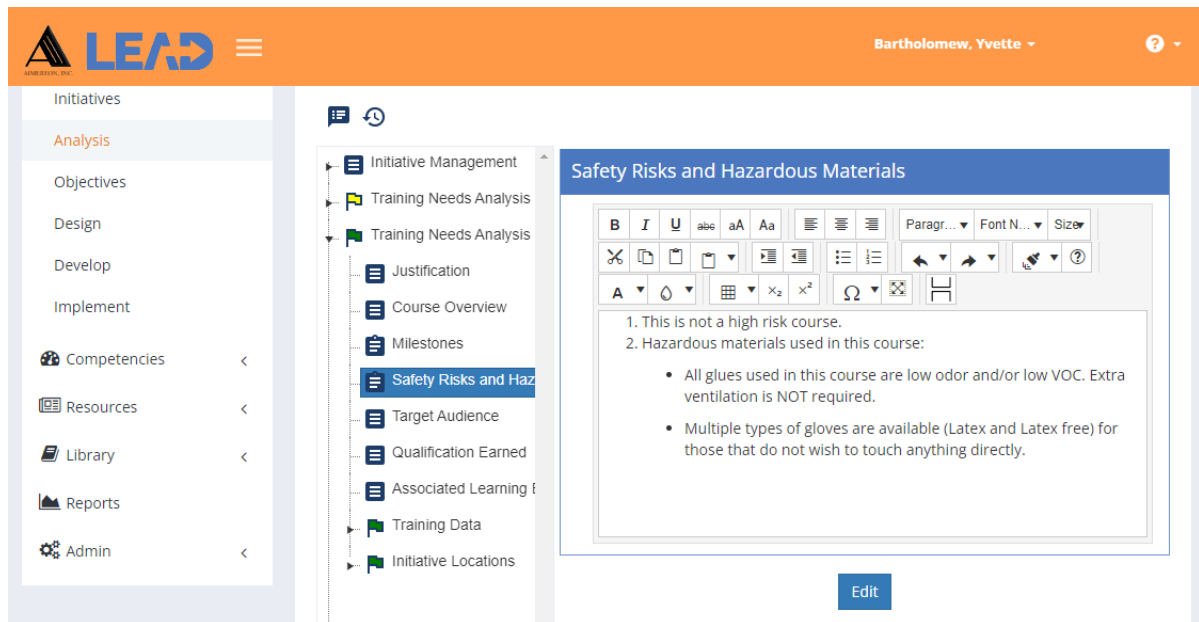




Figure 19: TNA > Safety Risks and Hazardous Materials

You can:

- View the information by clicking on the *Safety Risks and Hazardous Materials* folder.
- [Edit](#)²¹² the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.5 Target Audience (TNA and TMD)

On the *Target Audience* screen, you can describe who the learning event is for and how many people are in the target audience.

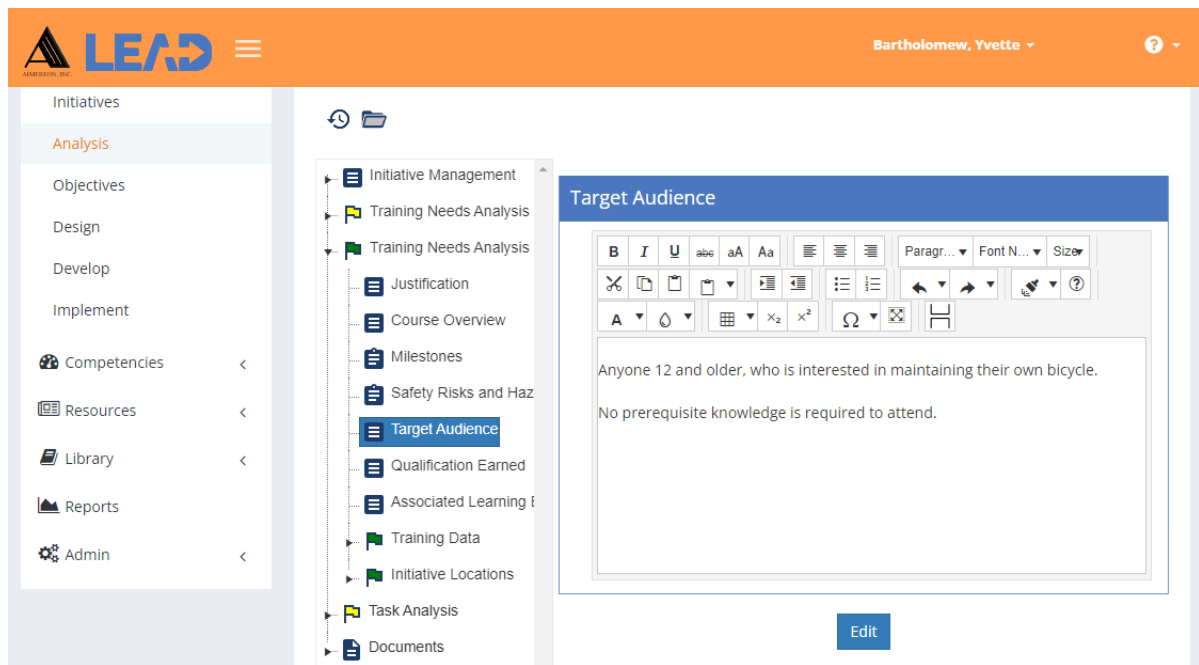




Figure 20: TNA/TMD > Target Audience

You can:

- View the information by clicking on the *Target Audience* folder.
- [Edit](#) ²¹² the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#) ²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#) ²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.6 Qualification Earned (TNA and TMD)

On the *Qualification Earned* screen, you can list any qualification(s) or certification(s) that a participant earns by completing the learning event.

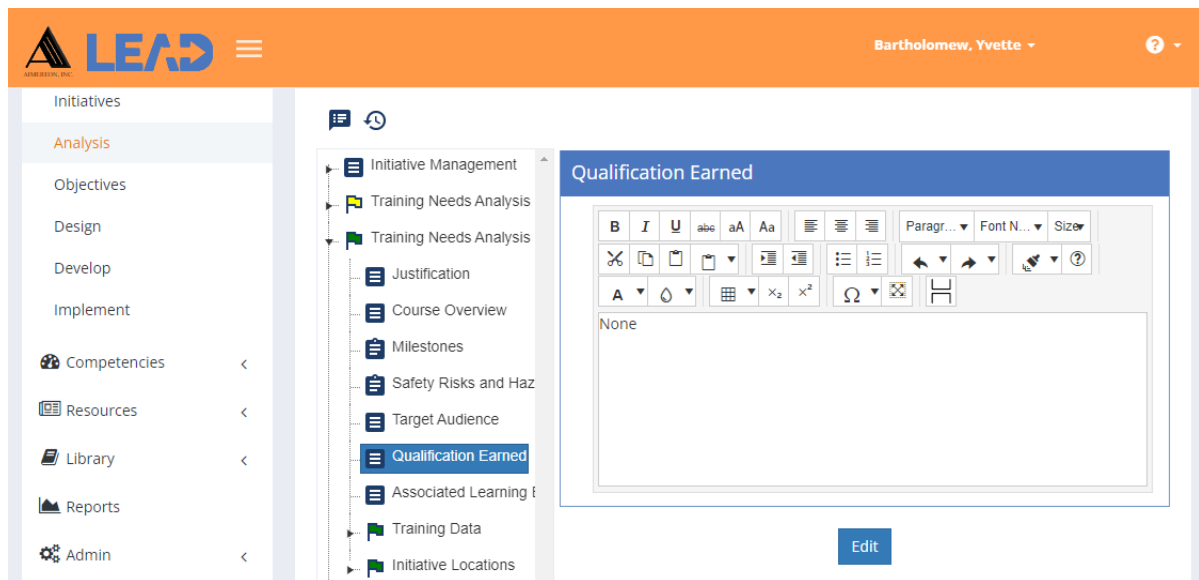




Figure 21: TNA/TMD > Qualification Earned

You can:

- View the information by clicking on the *Qualification Earned* folder.
- [Edit](#)²¹² the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.7 Associated Learning Events (TNA and TMD)

On the *Associated Learning Events* screen, you can list any associated learning events to the current initiative, including:

- Prerequisite learning events that participants must or should complete before they can attend this learning event or initiative.
- Equivalent learning events that participants can complete instead of this learning event or initiative.
- Follow-on learning events that participants can or should complete after they completed this learning event or initiative.

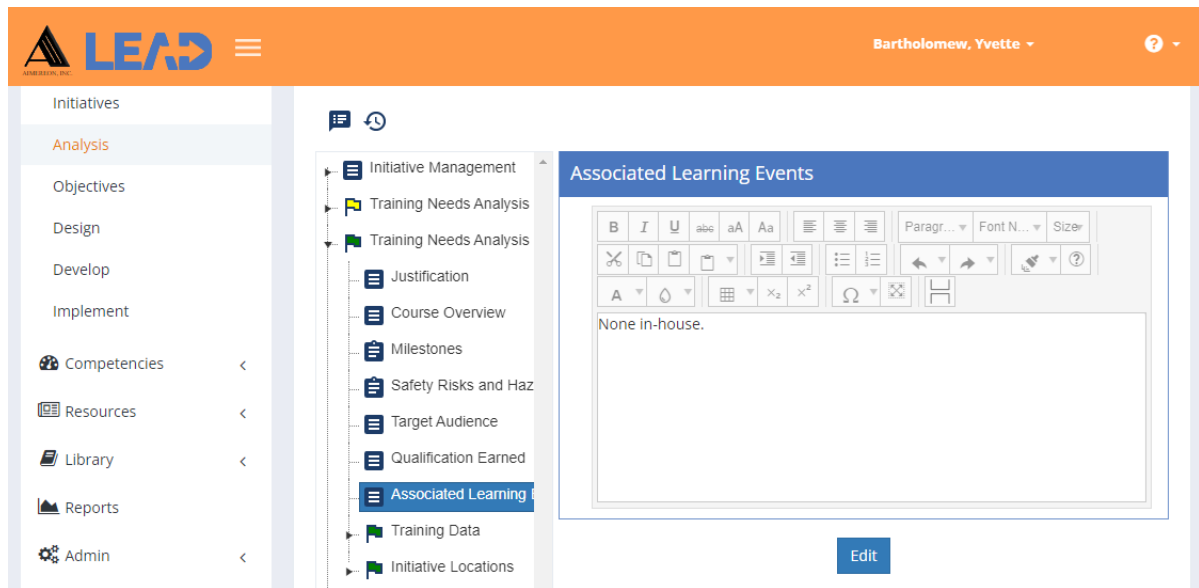




Figure 22: TNA/TMD > Associated Learning Events

You can:

- View the information by clicking on the *Associated Learning Events* folder.
- [Edit](#)²¹² the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.8 Training Data (TNA and TMD)

The *Training Data* screen lists the current and planned data for the learning event, including expected length, number of hours, minimum and maximum capacities, number of convenings (how often the learning event will be delivered), and the expected throughput of participants. All data from the *Training Data* screen and sub-folders will be copied to any newly added [Initiative Location](#)⁴⁹.





| | Current | Planned |
|---------------------------------|---------|---------|
| Course Length (in days)*: | 1 | 2 |
| Class Hours*: | 2 | 2 |
| Laboratory Hours*: | 4 | 6 |
| Assessment Hours*: | 2 | 2 |
| Class min. Capacity*: | 2 | 3 |
| Class max. Capacity*: | 10 | 12 |
| Class Convenings*: | 2 | 4 |
| Annual Participant Throughput*: | 20 | 48 |
| Personnel Totals*: | 1 | 2 |

*Field is required





Edit

Figure 23: TNA/TMD > Training Data

You can:

- View the training data.
- *Edit* the training data. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [Explain Flag](#)  to review the reasons the *Training Data* folder has been flagged.
- *Expand*  all the folders underneath *Training Data*.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

In the screens underneath the *Training Data* screen, you can enter information about the:

- [Schedule](#)  for delivering the learning event (in the TMD only).
- [Facilities](#)  needed to deliver the learning event.
- [Funding](#)  needed to develop and/or deliver the learning event.
- [Personnel](#)  needed to deliver the learning event.

- [Resources](#)²⁴⁸ needed to deliver the learning event.

3.2.2.8.1 Facilities (TNA and TMD)

The *Facilities* screen provides you with several fields to describe what facilities are needed to deliver or conduct the learning event. This could be a simple description of the room (or other spaces) needed, to a description of new construction that is needed for this learning event.

Figure 24: TNA/TMD > Training Data > Facilities

On this screen you can:

- View the facility information by selecting *Facilities* under the *Training Data* folder.
- Edit the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸ to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰ to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.8.2 Funding (TNA and TMD)

The *Funding* screen provides you with several fields to list the funding needed to develop and deliver or conduct the learning event over five fiscal (or financial) years. The starting fiscal year is set on the *Training Needs Analysis* screen. You can change this at any time. Changing the *Starting Fiscal Year* will NOT delete any funding information on the *Training Data > Funding* screen, so if you changed the year by mistake you can return to the previous selected year without any loss of data. The fiscal year used in LEAD is whatever fiscal year your organization uses.

Funding

Funding Amount: \$2,000

Shortfall Amount: \$0

Source of Funding: Training Funds

| Appropriation | Activity Group | Expense | FY 2022 | FY 2023 | FY 2024 | FY 2025 | FY 2026 |
|---------------|----------------|---------|---------|---------|---------|---------|---------|
| 2022 | TR | P | \$0 | \$500 | \$500 | \$500 | \$500 |
| 20200 | TR | S | \$0 | \$500 | \$500 | \$500 | \$500 |

Funding Notes:

Printing and supplies needed to conduct training.





*Field is required

Edit

Figure 25: TNA/TMD > Training Data > Funding

On the *Funding* screen you can:

- View the funding information by selecting *Funding* under the *Training Data* folder.
- *Edit* the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
 - Add a **+ New** funding or expense row to the table.
 - *Delete* a **✕** funding or expense row from the table.

- Select [View Comments](#)   to view, edit, and add to the comments.
- Select [Show History](#)   to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.8.3 Personnel (TNA and TMD)

The *Personnel* screen provides you with several fields to describe the number of personnel needed to deliver or conduct the learning event, including any expected shortfall of personnel and the source of the personnel. In LEAD, you can list the personnel requirements for four types of personnel:

- *Contractor* - anyone you hire specifically to deliver or conduct the learning event, the funding for which you would list in the *Funding* screen table.
- *Facilitator* - someone who facilitates the learning event and is employed by your organization.
- *Instructor* - someone who instructs the learning event and is employed by your organization.
- *Support* - someone that supports the delivery of the learning event, whether that's safety personnel, administrative support, testing support, or some other kind of support.

Personnel

Number of Personnel: 2
 Personnel Shortfall: 1
 Personnel Source: Service/Maintenance Departments

| | Personnel Type | FY 2022 | FY 2023 | FY 2024 | FY 2025 | FY 2026 |
|---|----------------|---------|---------|---------|---------|---------|
| ▼ | Instructor | | | | | |
| | Required | 1 | 2 | 2 | 2 | 2 |
| | Authorized | 1 | 1 | 0 | 0 | 0 |
| | Delta | 0 | 1 | 0 | 0 | 0 |
| ▼ | Facilitator | | | | | |
| | Required | 0 | 0 | 0 | 0 | 0 |
| | Authorized | 0 | 0 | 0 | 0 | 0 |
| | Delta | 0 | 0 | 0 | 0 | 0 |
| ▼ | Contractor | | | | | |
| | Required | 0 | 0 | 0 | 0 | 0 |
| | Authorized | 0 | 0 | 0 | 0 | 0 |
| | Delta | 0 | 0 | 0 | 0 | 0 |
| ▼ | Support | | | | | |
| | Required | 1 | 1 | 1 | 1 | 1 |
| | Authorized | 1 | 1 | 1 | 1 | 1 |
| | Delta | 0 | 0 | 0 | 0 | 0 |

Notes:



Support person is required to handle course administration. Two instructors are needed to conduct the course and supervise the enhanced lab sections. An additional instructor will be trained from the existing personnel.

*Field is required

Edit

Figure 26: TNA/TMD > Training Data > Personnel

On this screen you can:

- View the personnel information by selecting *Personnel* under the *Training Data* folder.
- Edit the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.8.4 Resources (TNA and TMD)

The *Resources* screen provides you with the ability to add any resources needed to deliver or conduct the learning event. You can select resources on this screen that you anticipate needing and LEAD will add to this list of resources when you select them during development.

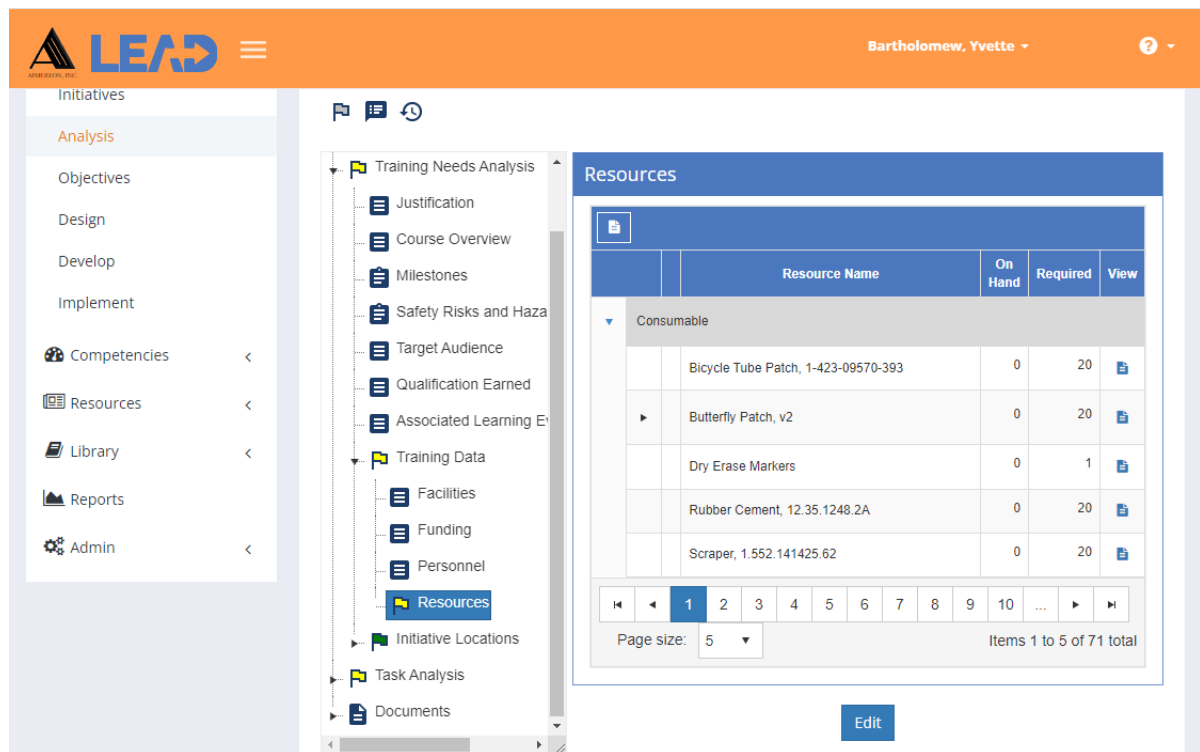










Figure 27: TNA/TMD > Training Data > Resources

On this screen you can:

- Select [Explain Flag](#)  to review the reasons the list of resources has been flagged.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- Select [Preview](#)  to generate the:
 - *Uncited Resources Report*. A spreadsheet that lists all resources in the *Resources* table that are **not** cited in the selected areas in the initiative. On the *Output Options* screen that pops-up, you can choose to check for resources **not** cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but listed in the *Resources* table.

- *Unlisted Resources Report*. A spreadsheet that lists all resources cited in the selected areas in the initiative and that are **not** in the *Resources* table. On the *Output Options* screen that pops-up, you can choose to check for resources cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but not listed in the *Resources* table.
- Select a resource and then:
 - *Preview*  to generate the:
 - *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
 - *Impact Report* that lists every place within the initiative where *any previous version* of the selected IETM is cited or used.
 - *Uncited Resources Report*. A spreadsheet that lists all resources in the *Resources* table that are **not** cited in the selected areas in the initiative. On the *Output Options* screen that pops-up, you can choose to check for resources **not** cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but listed in the *Resources* table.
 - *Unlisted Resources Report*. A spreadsheet that lists all resources cited in the selected areas in the initiative and that are **not** in the *Resources* table. On the *Output Options* screen that pops-up, you can choose to check for resources cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but not listed in the *Resources* table.
 - *Update*  to the latest version of a resource.
 - View the different versions of a resource by clicking on the arrow ► in the first column.
 - Select *Explain Flag*  to review the reasons the selected resource has been flagged.
 - *View*  the selected resource.
- *Edit* the resource list.

3.2.2.9 Initiative Locations (TNA and TMD)

On the *Initiative Locations* screen, you can select the initiative locations where training will take place. All data from the *Training Data* screen and sub-folders will be copied to a newly selected initiative location.

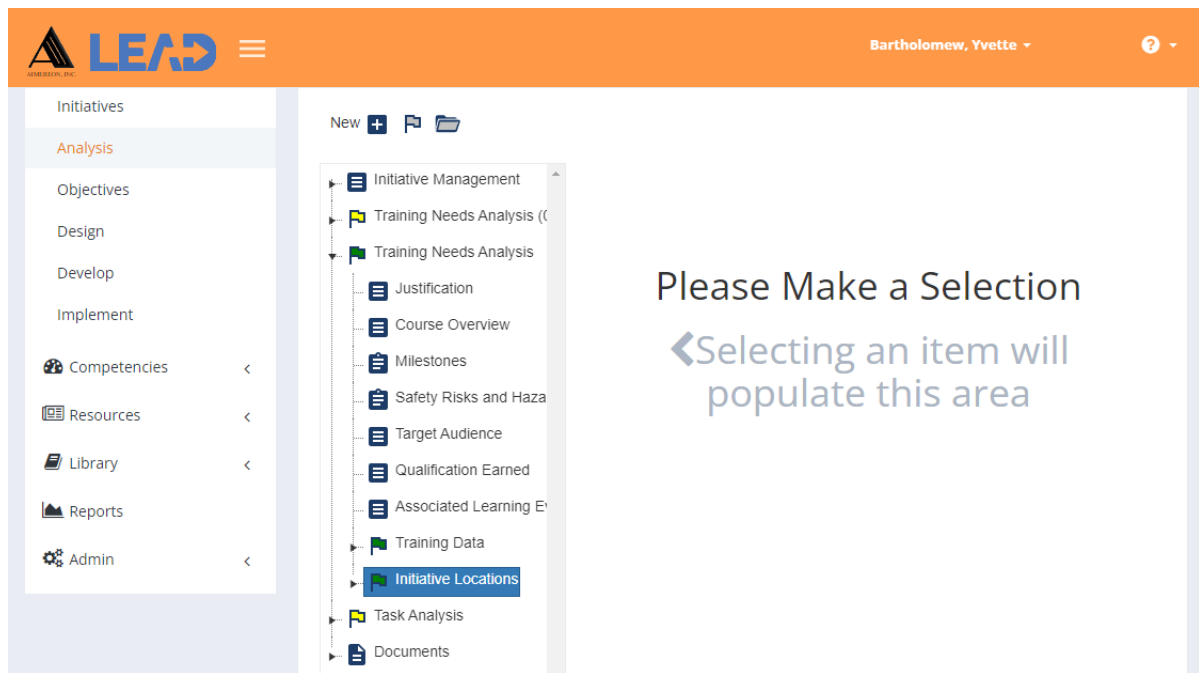






Figure 28: TNA/TMD > Initiative Locations

On this screen you can:

- Add a **New**  initiative location to the TNA or TMD. *Initiative Locations* are created on the [Admin > Locations](#)  screen.
- Select [Explain Flag](#)  to review the reasons the *Initiative Locations* folder has been flagged.
- *Expand*  all the sub-folders of all initiative locations.

3.2.2.9.1 [Selected] Initiative Location (TNA and TMD)

The *[Selected Initiative Location]* screen lists the current and planned data for the initiative location, including expected length, number of hours, minimum and maximum capacities, number of convenings (how often the learning event will be delivered), and the expected throughput of participants at that initiative location.

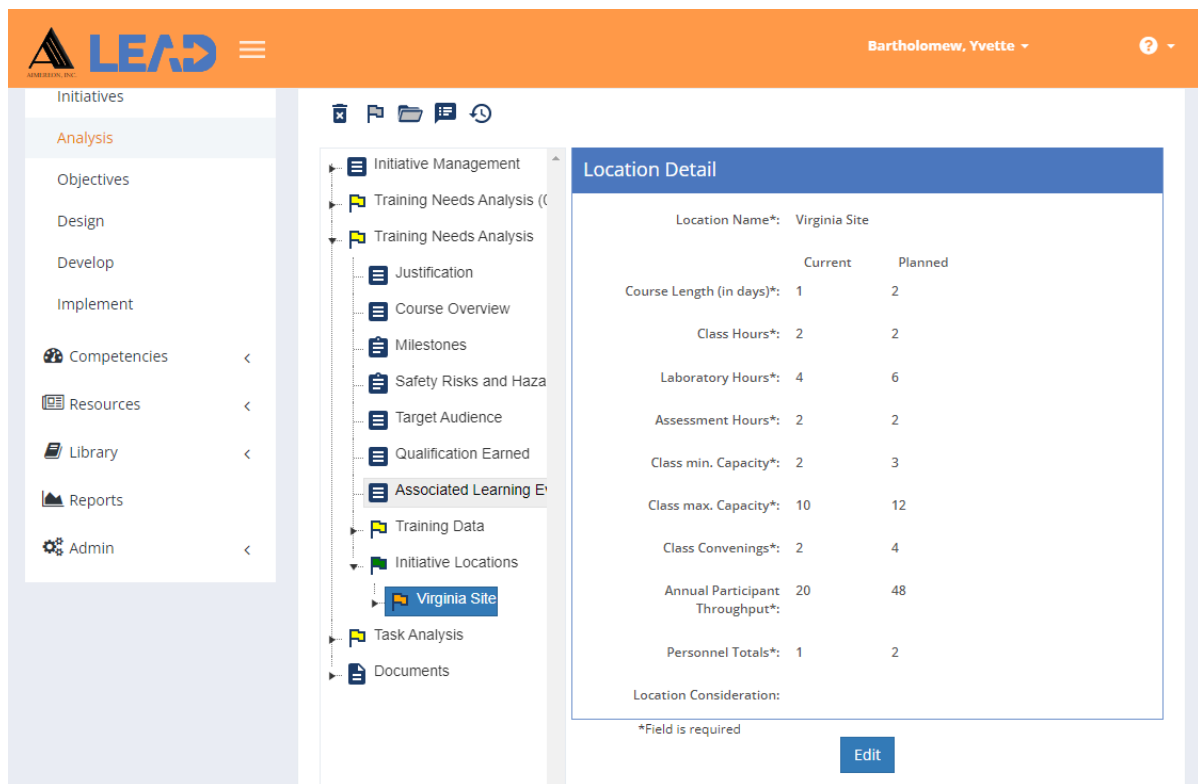







Figure 29: TNA/TMD > [Selected] Initiative Location

On this screen, you can:

- View the initiative location's information.
- *Edit* the initiative location's information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- *Delete*  the selected initiative location from the initiative. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- Select *Explain Flag*  to review the reasons the initiative location has been flagged.
- *Expand*  all the folders underneath a selected initiative location.
- Select *View Comments*  to view, edit, and add to the comments.
- Select *Show History*  to review the changes made to the initiative location, including the user name and date/time of saved changes, and revert to an earlier saved revision.

In the screens underneath the selected initiative location, you can enter information about the:

- [Schedule](#)¹⁰⁰ for delivering the learning event (in the TMD only).
- [Facilities](#)⁵² needed to deliver the learning event at that initiative location.
- [Funding](#)⁵³ needed to deliver the learning event at that initiative location.
- [Personnel](#)⁵⁵ needed to deliver the learning event at that initiative location.
- [Resources](#)⁵⁷ needed to deliver the learning event at that initiative location.

3.2.2.9.1.1 Facilities (TNA and TMD)

The *Facilities* screen provides you with several fields to describe what facilities are needed to deliver or conduct the learning event. This could be a simple description of the room (or other spaces) needed, to a description of new construction that is needed for this learning event. When you first add a new *Initiative Location*, the data is copied from the *Training Data > Facilities* screen for you to edit for the specific initiative location.

The screenshot displays the LEAD software interface. On the left, a sidebar menu shows 'Initiatives' as the active section, with 'Analysis' expanded. The main workspace shows a hierarchical tree view under 'Training Needs Analysis', with 'Facilities' selected under the 'Virginia Site' folder. The 'Facilities Detail' form is open, showing the following information:



- Funding Amount:** \$500
- Shortfall Amount:** \$50
- Source of Funding:** Training Fund
- Facilities Notes:** A rich text editor containing the text: "Need a workshop, a classroom would be nice to have in addition."

An 'Edit' button is located at the bottom right of the form. A small note at the bottom of the form states '*Field is required'.

Figure 30: TNA/TMD > Initiative Location > Facilities

On this screen you can:

- View the facility information by selecting *Facilities* under the [Selected Initiative Location] > *Initiative Locations* folder.

- *Edit* the information copied from the *Training Data > Facilities* screen. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.9.1.2 Funding (TNA and TMD)

The *Funding* screen provides you with several fields to list the funding needed to develop and deliver or conduct the learning event over five fiscal (or financial) years. The starting fiscal year is set on the *Training Needs Analysis* screen. You can change this at any time. Changing the *Starting Fiscal Year* will NOT delete any funding information on the *Initiative Locations > [Selected Initiative Location] > Funding* screen, so if you changed the year by mistake you can return to the previous selected year without any loss of data. The fiscal year used in LEAD is whatever fiscal year your organization uses. When you first add a new *Initiative Location*, the data is copied from the *Training Data > Funding* screen for you to edit for the specific initiative location.

The screenshot shows the LEAD system interface. The left sidebar contains a navigation menu with 'Initiatives' selected. The main content area displays the 'Funding' section for a selected Initiative Location. The 'Funding' section includes a summary of funding information and a table of funding data.

Funding Summary:

- Funding Amount: \$2,000
- Shortfall Amount: \$0
- Source of Funding: Training Funds

Funding Table:

| Appropriation | Activity Group | Expense | FY 2022 | FY 2023 | FY 2024 | FY 2025 | FY 2026 |
|---------------|----------------|---------|---------|---------|---------|---------|---------|
| 2022 | TR | P | \$0 | \$500 | \$500 | \$500 | \$500 |
| 20200 | TR | S | \$0 | \$500 | \$500 | \$500 | \$500 |

Funding Notes:



Printing and supplies needed to conduct training.

*Field is required

Edit

Figure 31: TNA/TMD > Initiative Location > Funding

On the *Funding* screen you can:

- View the funding information by selecting *Funding* under the selected *Initiative Location*.
- Edit the information copied from the *Training Data > Funding* screen. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
 - Add a **+ New** funding or expense row to the table.
 - Delete a **X** funding or expense row from the table.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.9.1.3 Personnel (TNA and TMD)

The *Personnel* screen provides you with several fields to describe the number of personnel needed to deliver or conduct the learning event, including any expected shortfall of personnel and the source of the personnel. When you first add a new *Initiative Location*, the data is copied from the *Training Data > Personnel* screen for you to edit for the specific initiative location. In LEAD, you can list the personnel requirements for four types of personnel:

- *Contractor* - anyone you hire specifically to deliver or conduct the learning event, the funding for which you would list in the *Funding* screen table.
- *Facilitator* - someone who facilitates the learning event and is employed by your organization.
- *Instructor* - someone who instructs the learning event and is employed by your organization.
- *Support* - someone that supports the delivery of the learning event, whether that's safety personnel, administrative support, testing support, or some other kind of support.

LEAD Bartholomew, Yvette ?

Initiatives

Analysis

Objectives

Design

Develop

Implement

Competencies

Resources

Library

Reports

Admin

Initiative Management

Training Needs Analysis

Training Needs Analysis

Justification

Course Overview

Milestones

Safety Risks and Haz

Target Audience

Qualification Earned

Associated Learning t

Training Data

Initiative Locations

Virginia Site

Facilities

Funding

Personnel

Resources

Task Analysis

Documents

Personnel

Number of Personnel: 2

Personnel Shortfall: 1

Personnel Source: Service/Maintenance Departments

| | Personnel Type | FY 2022 | FY 2023 | FY 2024 | FY 2025 | FY 2026 |
|---|----------------|---------|---------|---------|---------|---------|
| ▼ | Instructor | | | | | |
| | Required | 1 | 2 | 2 | 2 | 2 |
| | Authorized | 1 | 1 | 0 | 0 | 0 |
| | Delta | 0 | 1 | 0 | 0 | 0 |
| ▼ | Facilitator | | | | | |
| | Required | 0 | 0 | 0 | 0 | 0 |
| | Authorized | 0 | 0 | 0 | 0 | 0 |
| | Delta | 0 | 0 | 0 | 0 | 0 |
| ▼ | Contractor | | | | | |
| | Required | 0 | 0 | 0 | 0 | 0 |
| | Authorized | 0 | 0 | 0 | 0 | 0 |
| | Delta | 0 | 0 | 0 | 0 | 0 |
| ▼ | Support | | | | | |
| | Required | 1 | 1 | 1 | 1 | 1 |
| | Authorized | 1 | 1 | 1 | 1 | 1 |
| | Delta | 0 | 0 | 0 | 0 | 0 |

Notes:


Support person is required to handle course administration. Two instructors are needed to conduct the course and supervise the enhanced lab sections. An additional instructor will be trained from the existing personnel.



*Field is required

Edit

Figure 32: TNA/TMD > Initiative Location > Personnel

On this screen you can:

- View the personnel information by selecting *Personnel* under the selected *Initiative Location*.
- Edit the information copied from the *Training Data > Personnel* screen. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)  to view, edit, and add to the comments.

- Select [Show History](#)   to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.2.9.1.4 Resources (TNA and TMD)

The *Resources* screen provides you with the ability to add any resources needed to deliver or conduct the learning event. You can select resources on this screen that you anticipate needing and LEAD will add to this list of resources when you select them during development. When you first add a new *Initiative Location*, the data is copied from the *Training Data > Resources* screen for you to edit for the specific initiative location.

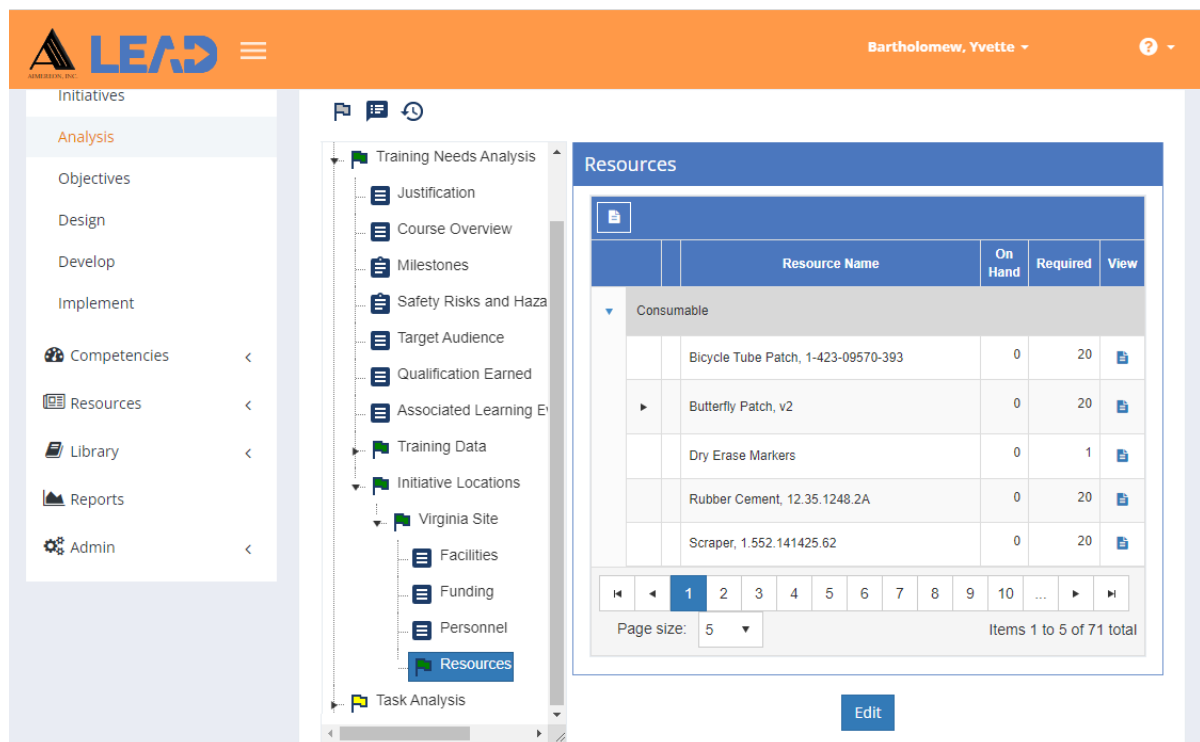











Figure 33: TNA/TMD > Initiative Location > Resources

On this screen you can:

- Select [Explain Flag](#)   to review the reasons the list of resources has been flagged.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)   to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- Select [Preview](#)  to generate the:
 - *Uncited Resources Report*. A spreadsheet that lists all resources in the *Resources* table that are **not** cited in the selected areas for the selected initiative location. On the

Output Options screen that pops-up, you can choose to check for resources **not** cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but listed in the *Resources* table.

- *Unlisted Resources Report*. A spreadsheet that lists all resources cited in the selected areas for the selected initiative location. and that are **not** in the *Resources* table. On the *Output Options* screen that pops-up, you can choose to check for resources cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but not listed in the *Resources* table.
- Select a resource and then:
 - *Preview*  to generate the:
 - *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
 - *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected IETM is cited or used.
 - *Uncited Resources Report*. A spreadsheet that lists all resources in the *Resources* table that are **not** cited in the selected areas for the selected initiative location. On the *Output Options* screen that pops-up, you can choose to check for resources **not** cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but listed in the *Resources* table.
 - *Unlisted Resources Report*. A spreadsheet that lists all resources cited in the selected areas for the selected initiative location. and that are **not** in the *Resources* table. On the *Output Options* screen that pops-up, you can choose to check for resources cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but not listed in the *Resources* table.
 - View the different versions of a resource by clicking on the arrow ► in the first column.
 - Select [Explain Flag](#)  to review the reasons the selected resource has been flagged.
 - View  a selected resource.
- *Edit* the resource list.

3.2.3 Task Analysis

The *Task Analysis* area captures the job, task analysis information of the tasks that will be trained to during the learning event. The skill hierarchy available to capture this information includes:

- [Job](#)⁶⁰ - based on the selected competency data; one or more jobs will be created when you first select from the competencies to include in the task analysis. You can also create one or more jobs as needed.
- [Duty](#)⁶² - is a grouping of tasks. One duty is automatically created for every job created from a competency. You can add duties to help you manage the tasks.
- [Task](#)⁶⁴ - is a specific work behavior, with a clear beginning and end point, which can be observed and measured. One task is created for each competency task, knowledge, skill, or ability that is selected. You can have multiple tasks created from the same competency selection. If no competency task, knowledge, skill, or ability is selected, you can create as many tasks as needed. You can break down a task into two or more subtasks, if needed.
- [Subtask](#)⁶⁶ - is a major part of a tasks. You can break down a subtask into two or more steps, if needed.
- [Step](#)⁶⁸ - is a major part of a subtask. A step is the most specific form of behavior and the smallest part defined in the task analysis.

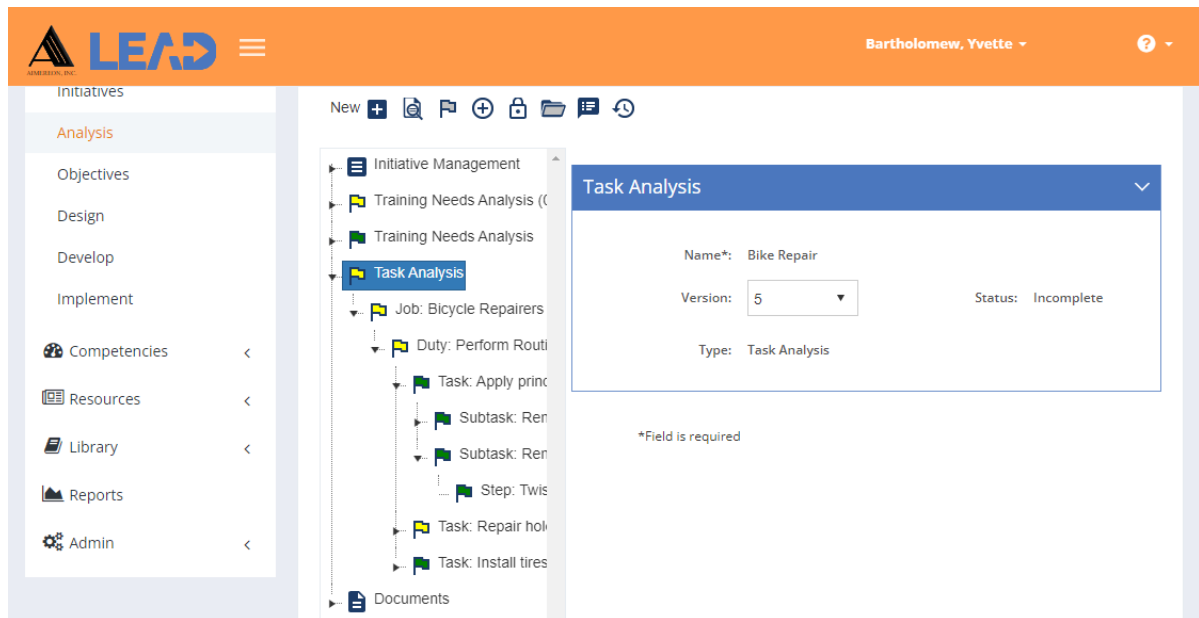













Figure 34: Analysis > Task Analysis

The skill hierarchy you develop in the task analysis is approved once the initiative is approved. This allows you to make changes as needed, while you progress with your initiative. You have the following actions available to you:

- View the information by clicking on the *Task Analysis* folder.
- Add **New**  jobs not linked to competencies.
- Preview  the skill hierarchy.
- *Paste: Duplicate*  a copied job (and any skills under that job). The *Status* of the copied job will be updated to *Incomplete* when it is pasted. You can use the *Duplicate* option to make copies of the job in other initiatives.
Note: You Copy  [Jobs](#) ⁶¹, [Duties](#) ⁶³, [Tasks](#) ⁶⁶, [Subtasks](#) ⁶⁷, and [Steps](#) ⁶⁹ by selecting them and then going up one level in the hierarchy to *Paste* the copied skill. You cannot paste a copied skill when the selected skill is *Locked*.
- Select [Explain Flag](#) ²²⁰  to review the reasons the Task Analysis has been flagged.
- Use *Create From Competencies*  to select competencies and create the first draft of the skill hierarchy. You can continue to build your skill hierarchy from competencies throughout your analysis.
- [Lock](#) ⁵⁹  the Task Analysis to prevent edits from taking place.
- [Unlock](#) ⁵⁹  a locked Task Analysis to allow edits to take place again.
- *Expand*  all sub-folders at once down to the step level. Selecting any skill and then *Expand* opens just that skill down to the step level.
- Select [View Comments](#) ²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#) ²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.3.1 Job

LEAD creates one or more jobs automatically based on the selected competencies. You can rename the job title and add a job description, if desired. To add jobs manually, go to the *Task Analysis* folder and select **New** .

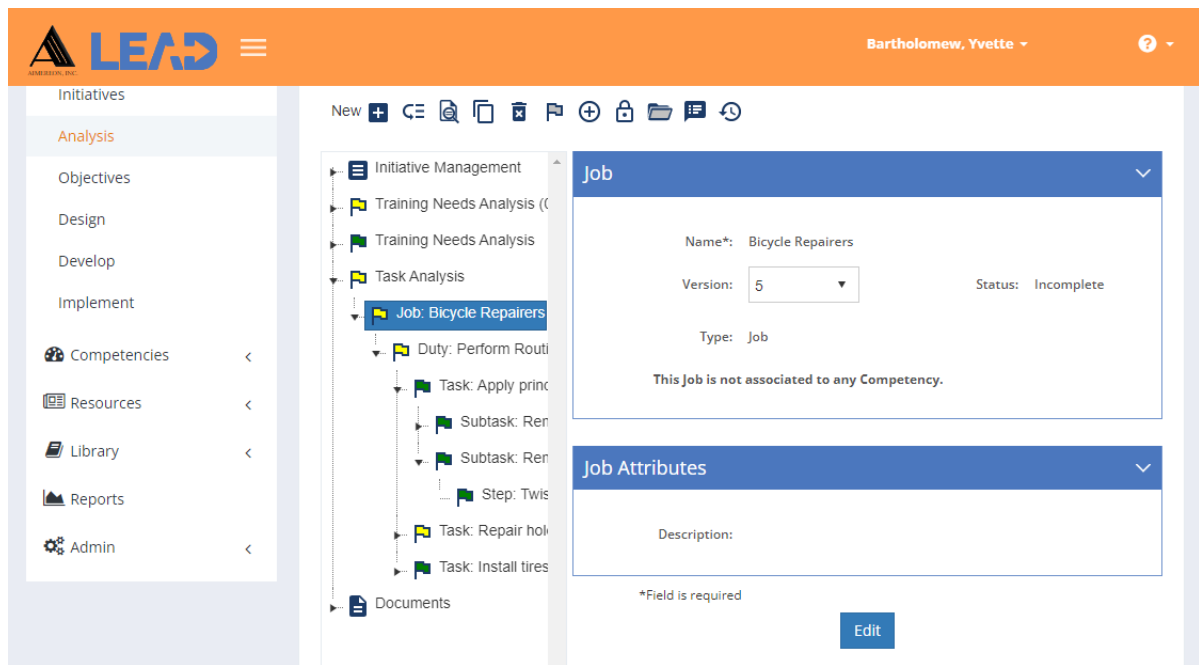













Figure 35: Task Analysis > Job

On the *Job* screen you can:

- *View* the information.
- *Edit* the information.
- Add **New** duty.
- *Resequence* the duties below the job folder in the tree structure.
- *Preview* the skill hierarchy.
- *Copy* the selected job into memory.
Note: Remember to go up one level in the hierarchy to the Task Analysis before trying to select *Paste*.
- *Paste: Duplicate/Move* a copied duty (and any skills under that duty) to the selected job.
Note: You cannot *Paste* a copied duty when the selected job is *Locked*.
 - *Duplicate* will create a copy of the duty. The *Status* of the copied duty will be updated to *Incomplete* when it is pasted. You can use the *Duplicate* option to make copies of the duty in other initiatives.
 - *Move* will move the duty under the selected job. When you move a duty, the *Status* of the moved duty does not change. You cannot move a duty to another initiative.

- *Delete*  the selected job (including all duties, tasks, subtasks, and steps under the job). Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- Select *Explain Flag* ²²⁰  to review the reasons the job has been flagged.
- Use *Create From Competencies*  to select competencies from the selected job (see the "This item was created from Competencies" for the currently selected job) to add to your skill hierarchy. If you haven't selected anything from competencies, this will allow you to choose from all available competencies data.
- *Lock*  the job to prevent edits from taking place.
- *Unlock*  a locked job to allow edits to take place again.
- *Expand*  all sub-folders at once down to the step level.
- Select *View Comments* ²¹⁸  to view, edit, and add to the comments.
- Select *Show History* ²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.3.2 Duty

LEAD creates a new duty automatically when you first select from the competencies data. Duties allow you to group tasks. You can rename the automatically created duty to give it a more user-friendly name and you can add additional duties (from the *Job* folder) as needed.

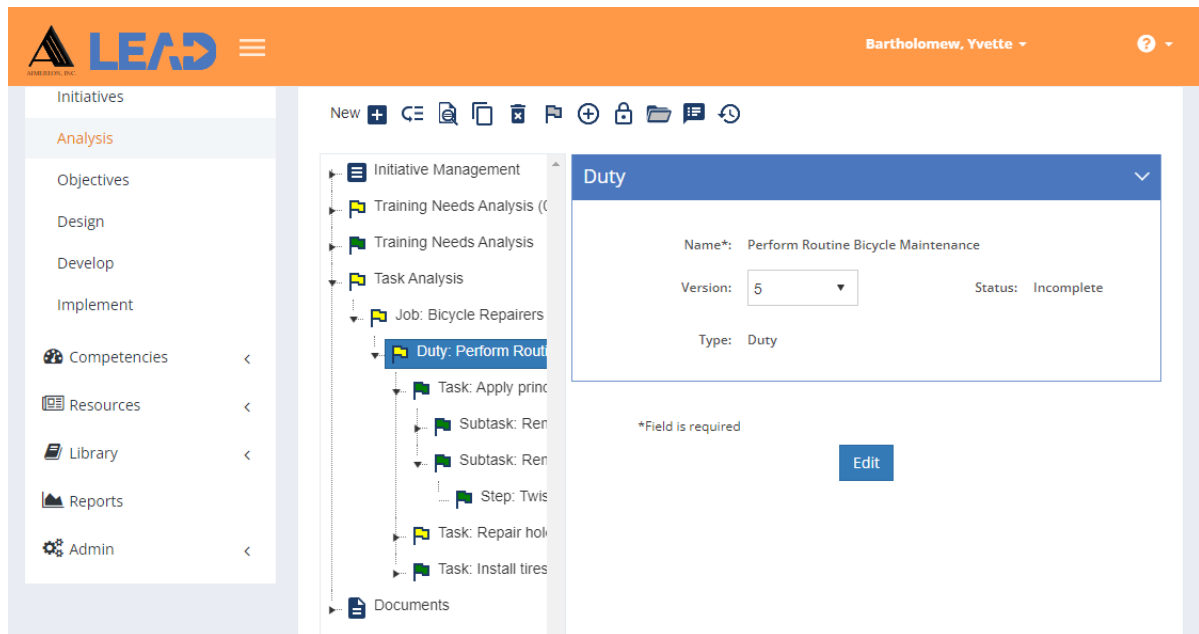















Figure 36: Task Analysis > Duty




On the *Duty* screen you can:

- View the information by clicking on the *Duty* folder.
- Edit the information.
- Add **New**  tasks that are not selected from the competencies data.
- [Resequence](#)  the tasks below the *Duty* folder in the tree structure.
- Preview  the skill hierarchy.
- Copy  the selected duty into memory.
Note: Remember to go up one level in the hierarchy to a job before trying to select *Paste*.
- Paste: Duplicate/Move  a copied task (and any skills under that task) to the selected duty.
Note: You cannot *Paste* a copied task when the selected duty is *Locked*.
 - *Duplicate* will create a copy of the task. The *Status* of the copied task will be updated to *Incomplete* when it is pasted. You can use the *Duplicate* option to make copies of the task in other initiatives.
 - *Move* will move the task under the selected duty. When you move a task, the *Status* of the moved task does not change. You cannot move a task to another initiative.

- **Delete**  the selected duty (including all tasks, subtasks, and steps under the duty). Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- Select [Explain Flag](#)  to review the reasons the duty has been flagged.
- Use *Create From Competencies*  to select competencies to add to your skill hierarchy.
- **Lock**  the duty to prevent edits from taking place.
- **Unlock**  a locked duty to allow edits to take place again.
- **Expand**  all sub-folders at once down to the step level.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.3.3 Task

LEAD creates tasks automatically when you first select tasks, knowledge, skills, or abilities from the competencies data. You can also create tasks that are not linked to competencies data. A task is a specific work behavior, with a clear beginning and end point, that can be observed and measured. You can have multiple tasks based on the same competency selection. You can break down a task into two or more subtasks, as needed. You can (and should) edit the task as needed. The *Task* screen has multiple tabs that you can minimize to see just the information you are working on:




- *Task* - for the main information about the task.
- *Task Attributes* - to list the conditions and standards under which the task is performed on the job, along with any resources that someone would have available when they do the task on the job. You can easily add conditions and standards from the [Condition/Standard Selection](#)  screen and *resources* from the [Resource Selection](#)  screen.
- *Training Task Analysis* - a list of different areas with answers that will help you separate the tasks that NEED to be trained from those that COULD be trained. The questions will also help you determine the amount of time to spend on training each task (if everyone performs the task, and it is hard to learn, then you need more time to train for that task; a task that few people perform, and that is easy to learn and be proficient at will need less time in training, if it is trained at all). The answers to each area can be customized for your organization under *Customizations > Lists > Task Analysis Content* .










- *KSAs* - the supporting knowledge, skill, and ability statements that support the task, selected from the *KSA* entries on the *Library* tab. You can easily add *KSA* entries from the [KSA Selection](#)⁷⁰ screen.
- *Interventions* - any existing interventions that support the task, selected from the *Intervention* entries on the *Library* tab. You can easily add interventions entries from the [Intervention Selection](#)⁷⁰ screen.

The screenshot displays the LEAD software interface. On the left, a sidebar menu shows 'Initiatives' as the active section, with sub-items like 'Analysis', 'Objectives', 'Design', 'Develop', 'Implement', 'Competencies', 'Resources', 'Library', 'Reports', and 'Admin'. The main workspace shows a hierarchical tree structure under 'Initiative Management'. The 'Task' folder is expanded, showing subtasks like 'Duty: Perform Routine Maintenance', 'Task: Apply principles, techniques, procedures, and equipment to routine bicycle maintenance', 'Subtask: Repair handlebars', 'Subtask: Repair wheels', 'Step: Twist handlebars', 'Task: Repair handlebars', and 'Task: Install tires'. The right-hand panel, titled 'Task', provides detailed information for the selected task. It includes fields for 'Verb*' (Apply), 'Text*' (principles, techniques, procedures, and equipment to routine bicycle maintenance), 'Version' (5), 'Status' (Incomplet), 'Type' (Task), 'Task Type' (2 - Psych), 'Status of Training' (2 - Not Be), 'Proficiency Level' (6 - SPL1), and 'Proficiency Definition' (Able to do things with help). It also indicates the 'Type of Training' as 'Formal; OJT' and notes that the item was created from Competencies. At the bottom, it lists O*Net codes: 49-0000 Installation, Maintenance, and Repair Occupations; 49-3000 Vehicle and Mobile Equipment Mechanics, Installers, and Repairers; 49-3090 Miscellaneous Vehicle and Mobile Equipment Mechanics, Installers, and Repairers; and 49-3091.00 Bicycle Repairers: Assemble new bicycles.

Figure 37: Task Analysis > Task

On this screen you can:

- *View* the information by clicking on the *Task* folder.
- *Edit* the information.
- Add a **New**  subtask, based on the selected task (and competency).
- [Resequence](#)²⁰⁹  the subtasks below the task folder in the tree structure.
- *Preview*  the skill hierarchy.

- **Copy**  the selected task into memory.
Note: Remember to go up one level in the hierarchy to a duty before trying to select *Paste*.
- **Paste: Duplicate/Move**  a copied subtask (and any steps under that subtask) to the selected task.
Note: You cannot *Paste* a copied subtask when the selected task is *Locked*.
 - *Duplicate* will create a copy of the subtask. The *Status* of the copied subtask will be updated to *Incomplete* when it is pasted. You can use the *Duplicate* option to make copies of the subtask in other initiatives.
 - *Move* will move the subtask under the selected task. When you move a subtask, the *Status* of the moved subtask does not change. You cannot move a subtask to another initiative.
- **Delete**  the selected task (including all subtasks, and steps under the task). Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- Select [Explain Flag](#)  to review the reasons the task has been flagged.
- **Lock**  the task to prevent edits from taking place.
- **Unlock**  a locked task to allow edits to take place again.
- **Expand**  all sub-folders at once down to the step level.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.3.4 Subtask

Subtasks are major parts of a task. Depending on the competency statement, you may want to create subtasks to break up the main task. You can also break down a subtask into two or more steps, if needed. The *Subtask* screen has three tabs that you can minimize to see just the information you are working on:

- *Subtask* - for the main information about the subtask.
- *Subtask Attributes* - to list the conditions and standards under which the subtask is performed on the job, along with any resources that someone would have available when they do the subtask on the job.

- *Interventions* - any existing interventions that support the subtask, selected from the Interventions in LEAD.

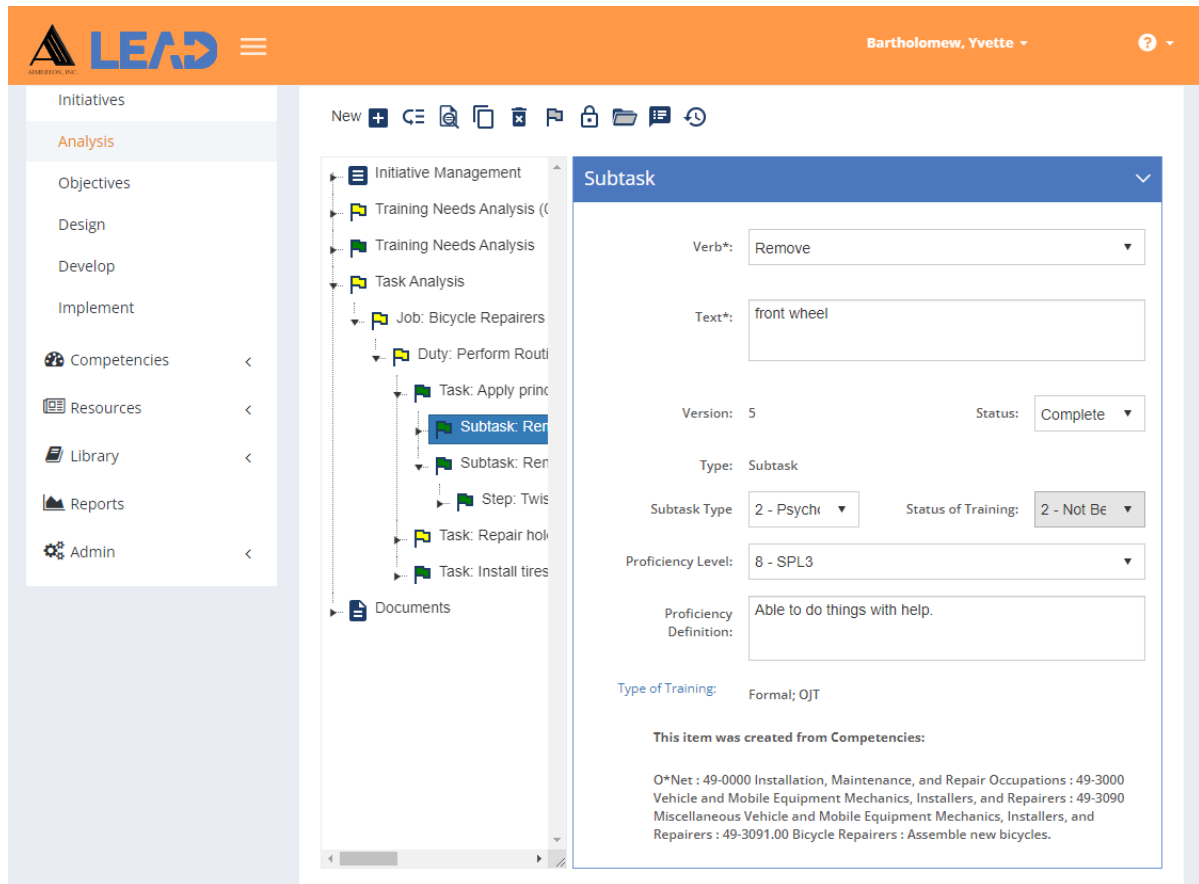














Figure 38: Task Analysis > Subtask

On this screen you can:

- View the information by clicking on the *Subtask* folder.
- Edit the information.
- Add a **New**  step, based on the selected subtask (and competency).
- **Resequence**  the steps below the *Subtask* folder in the tree structure.
- **Preview**  the skill hierarchy.
- **Copy**  the selected subtask into memory.
Note: Remember to go up one level in the hierarchy to a task before trying to select *Paste*.
- **Paste: Duplicate/Move**  a copied step to the selected subtask.
Note: You cannot *Paste* a copied step when the selected subtask is *Locked*.

- *Duplicate* will create a copy of the step. The *Status* of the copied step will be updated to *Incomplete* when it is pasted. You can use the *Duplicate* option to make copies of the step in other initiatives.
- *Move* will move the step under the selected subtask. When you move a step, the *Status* of the moved step does not change. You cannot move a step to another initiative.
- *Delete*  the selected subtask (including all steps under the subtask). Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- *Explain Flag*  to review the reasons the subtask has been flagged.
- *Lock*  the subtask to prevent edits from taking place.
- *Unlock*  a locked subtask to allow edits to take place again.
- *Expand*  to see all steps.
- Select *View Comments*  to view, edit, and add to the comments.
- Select *Show History*  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.3.5 Step

A step is a major part of a subtask and the most specific form of behavior, and the smallest component defined in the task analysis. The *Step* screen has three tabs that you can minimize to see just the information you are working on:

- *Step* - for the main information about the step.
- *Step Attributes* - to list the conditions and standards under which the step is performed on the job, along with any resources that someone would have available when they do the step on the job.
- *Interventions* - any existing interventions that support the task, selected from the Interventions in LEAD.

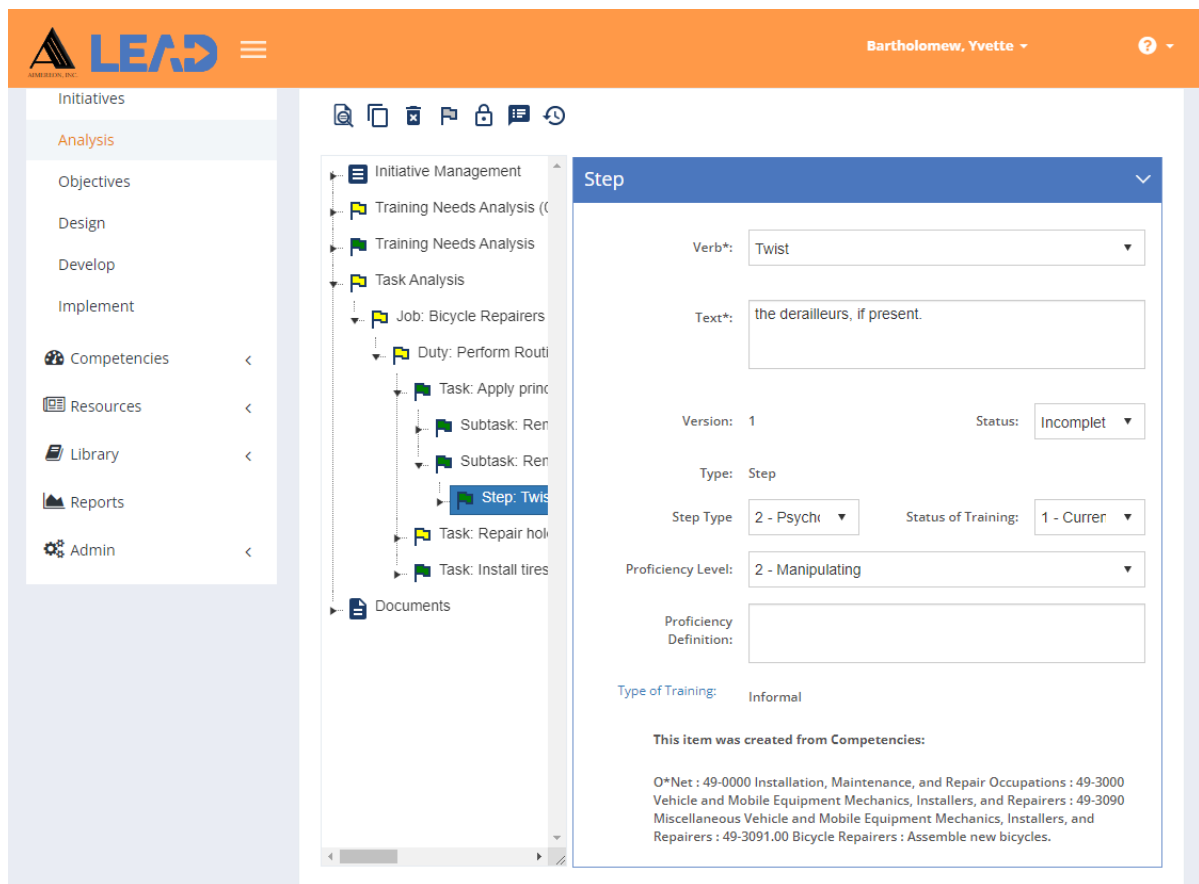












Figure 39: Task Analysis > Step

On this screen you can:

- View the information by clicking on the *Step* folder.
- Edit the information.
- Preview  the skill hierarchy.
- Copy  the selected step into memory.
Note: Remember to go up one level in the hierarchy to a subtask before trying to select *Paste*.
- Delete  the selected step. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- Select *Explain Flag*  to review the reasons the step has been flagged.
- Lock  the job to prevent edits from taking place.
- Unlock  a locked job to allow edits to take place again.

- Select [View Comments](#)   to view, edit, and add to the comments.
- Select [Show History](#)   to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.2.3.6 Adding Conditions, Standards, and Resources

Tasks, subtasks, and steps allow you to add the:

- *Conditions* under which the skill is performed.
- *Standards* to which the skill should be performed.
- *Resources* that are needed or support the skill when it is being performed.

3.2.3.7 Adding Knowledge, Skills, and Abilities

Tasks allow you to list the:



- *Knowledge* that is needed to perform the task.
- *Skills* that are needed to perform the task.
- *Abilities* that are needed to perform the task.


3.2.3.8 Adding Interventions

Tasks, subtasks, and steps allow you to list any existing interventions that support the skill.

3.2.3.9 Selecting from Competencies

There are two ways to select a Competency for a task in LEAD:

- If you want to add new tasks that are linked to the [O*Net Competencies](#) , select *Create From Competencies*  on the *Task Analysis*, *Job*, or *Duty* folders. This allows you to make multiple selections to create new tasks for your skill hierarchy.
- If you need to change the selected competency for a task (and its subtasks and steps), first select *Edit* to edit the task, then select *Edit* under the "This item was created from Competencies." text. This allows you to change or select a competency the task is based on.

Either way will open the *Competency Selection* screen which shows the O*Net tree structure. Select a folder and then *Expand*  to open up the folders up to three levels at a time:

- Selecting the *O*Net* folder and then *Expand* opens up to the *Broad Jobs* folders.

- Selecting a *Major Occupation* folder and then *Expand* opens up to the *Jobs* folders under the selected *Major Occupation* folder.
- Selecting a *Minor Occupation* folder and then *Expand* opens up to the *Tasks* of all *Jobs* under the selected *Minor Occupation* folder.
- Selecting a *Broad Job* folder and then *Expand* opens up all entries of each *Job*, including the *Tasks*, *Knowledge*, *Skills*, and *Abilities* under the selected *Broad Jobs* folder.



Figure 40: Task Analysis > Competency Selection Screen

Select the tasks, knowledge, skills, or abilities entry or entries you need by selecting the checkbox(es) and then selecting *Save*.

3.2.4 Documents

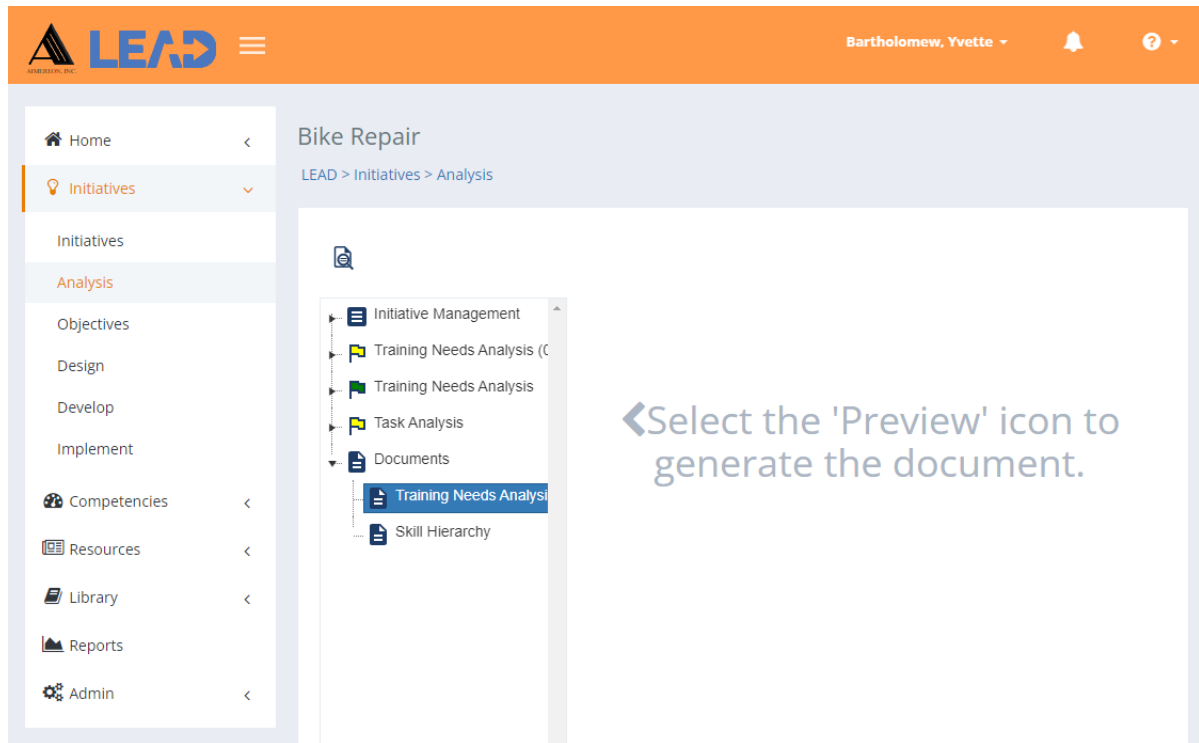



Figure 41: Analysis > Documents

Expand  the *Documents* folder to see the available options:

- *Training Needs Analysis* - a PDF document of the information contained in the *Training Needs Analysis* folders, this will always output the current TNA, whether that's the first TNA or the latest Modification TNA. You can choose whether to include any comments on the *Output Options* screen.
- *Skill Hierarchy* - a PDF document of the skill structure that is contained in the *Task Analysis* folders.

Select the document you wish to create in the tree structure. Then select *Preview*  to generate the document.

3.3 Objectives

On the *Objectives* tab, you can build the learning objectives based on your completed task analysis. LEAD will automatically generate the learning objectives by using the verb, skill text, and any selected conditions and standards from the task, subtask, and step information you entered for the task analysis. A task becomes a Terminal Objective (TO), while subtasks and steps become Enabling Objectives (EOs). From this baseline, you can change the objective type from Terminal to Enabling or vice versa. You can also change the *Skill Basis* the objective

is based on (i.e., the task, subtask, or step), where an objective can be based on more than one skill). An objective can also be based on the Knowledge, Skills, and Abilities (KSAs) entries of a task (and yes, you can select more than one KSA for an objective).

The screenshot shows the LEAD system interface for the 'Bike Repair' initiative. The page title is 'Bike Repair' and the breadcrumb is 'LEAD > Initiatives > Objectives'. A search bar is present with the text 'Text to search'. Below the search bar is a table of objectives.

| No | Type | Objective Text | Skill Basis | Content Type | Status | Actions | Delete |
|----|------|-----------------------------------------------------------------------------------------------------------------------|-------------|--------------|-------------------|---------|--------|
| 1 | TO | With the bicycle removed from all lanes of traffic, remove the tire, wheel, and tube from the bicycle with no errors. | Task | | Complete | | |
| 2 | EO | With the bicycle removed from all lanes of traffic, remove the front wheel of the bicycle without errors. | Subtask | Procedure | Complete | | |
| 3 | EO | With the bicycle removed from all lanes of traffic, remove the rear wheel of the bicycle with no errors. | Subtask | Procedure | Complete | | |
| 4 | TO | With the bicycle removed from all lanes of traffic, repair hole(s) in the bicycle tube with no errors. | Task | | Complete | | |
| 5 | EO | With the bicycle removed from all lanes of traffic, remove the tube from the bicycle wheel with no errors. | Subtask | Procedure | Locked for Review | | |

At the bottom of the table, there is a pagination bar showing 'Page size: 5' and 'Items 1 to 5 of 9 total'.

Figure 42: Initiatives > Objectives

In the *Design* tab > *Curriculum Development* folder you will build out the table of contents structure. The *Scope* of the initiative determines what each level in the table of contents structure is named. In that table of contents structure, the EO is linked to the lowest level (e.g., section), while a TO is linked one level higher, i.e., to the second lowest level (e.g., lesson).


Note: Each TO must have at least one EO associated (underneath) with it. If the scope of your initiative is set to: Lesson, Distance Learning Lesson, Mentoring, or Workshop, you can have only ONE TO. You can have as many EOs as you would like. All other initiative scopes allow you to have as many TOs and EOs as you can come up with (and as you need).

















In general, learning objectives should state what the participant will be able to do after they complete a piece of learning content, using the construct of:



- Condition, under which the participant will be required to perform the desired behavior - this could be a list of things they are allowed to use, or not allowed to use, or it could be a location or time of day.

- Behavior, what the participant will be required to be able to do.
- Standard, to which the participant should perform the behavior - this should be measurable! That is why LEAD does not come with the verbs "Understand" or "Know" as standard, as those are not measurable.

However, this will depend on your organization's standards for learning objectives. Some organizations want very specific learning objectives, while others only want to see those conditions and standards that are different from the expected conditions (e.g., in a classroom) and standards (e.g., without errors).

Once you've added the automatically generated objectives using *Add Missing* , you can:

- *View*  the objective.
- *Edit*  the objective, including the:
 - Objective text.
 - Objective type (TO or EO).
 - Skill basis of the objective; an objective can be based on one or more skills or KSA entries from the task analysis.
 - Assessment information, including the learning domain, passing criteria, and criticality index information, and for EOs also test item type and number of test items.
- Select *View Comments*   to view, edit, and add to the comments for that objective.
- Select *Show History*   to review the changes made to the objective, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete*  the selected objective, as long as it is not linked/used in the *Curriculum Development* folder on the *Design* tab. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- Add a *+ New*  objective, based on one or more skills or KSA entries from the task analysis.
- *Resequence*   the objectives in the teaching or learning order.
- *Export*  the *Objective Assessment Information* spreadsheet that is generated to list all objectives, along with the assessment information that is gathered for the objective.
- *Add Missing*  to add objectives, after amending the task analysis on the *Analysis* tab.
- Select *Explain Flag*   to review the reasons the objective has been flagged.
- *Lock*   the objective to prevent edits from taking place.

- [Unlock](#)⁷²  a locked objective to allow edits to take place again.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments for all objectives on the screen.

3.3.1 Viewing or Editing Terminal Objectives

When you view or edit a Terminal Objective (TO), you see a tabbed screen. When editing, you can make the desired changes to the TO to match your needs. There are several tabs/areas on this screen:

- [General](#)⁷⁵ - the text of the objective, version, and type of objective.
- [Skill Basis](#)⁷⁵ - the skill basis of the objective.
- [Assessment](#)⁷⁵ - information about how the objective should be assessed.

3.3.2 Viewing or Editing Enabling Objectives

When you view or edit an Enabling Objective (EO), you see a tabbed screen. When editing, you can make the desired changes to the EO to match your needs. There are several tabs/areas on this screen:

- [General](#)⁷⁵ - the text of the objective, version, and type of objective.
- [Skill Basis](#)⁷⁵ - the skill basis of the objective.
- [Assessment](#)⁷⁵ - information about how the objective should be assessed.

3.3.3 Selecting the Skill Basis

On the *Skill Basis Selection* screen, you can select the skill basis for a learning objective. An objective can be based on one or more tasks, subtasks, or steps. An objective can also be based on one or more of the knowledge, skill, or ability entries that were selected for a task in the task analysis.

3.4 Design

On the *Design* tab, you can manage your initiative, complete the [Training Management Document](#)⁸¹, lay out the table of contents for your [Curriculum Development](#)¹⁰⁸ initiative, including detailed design information, and develop the [Testing Plan](#)¹²⁰. You can also generate the design documents under the [Documents](#)¹²³ folder.

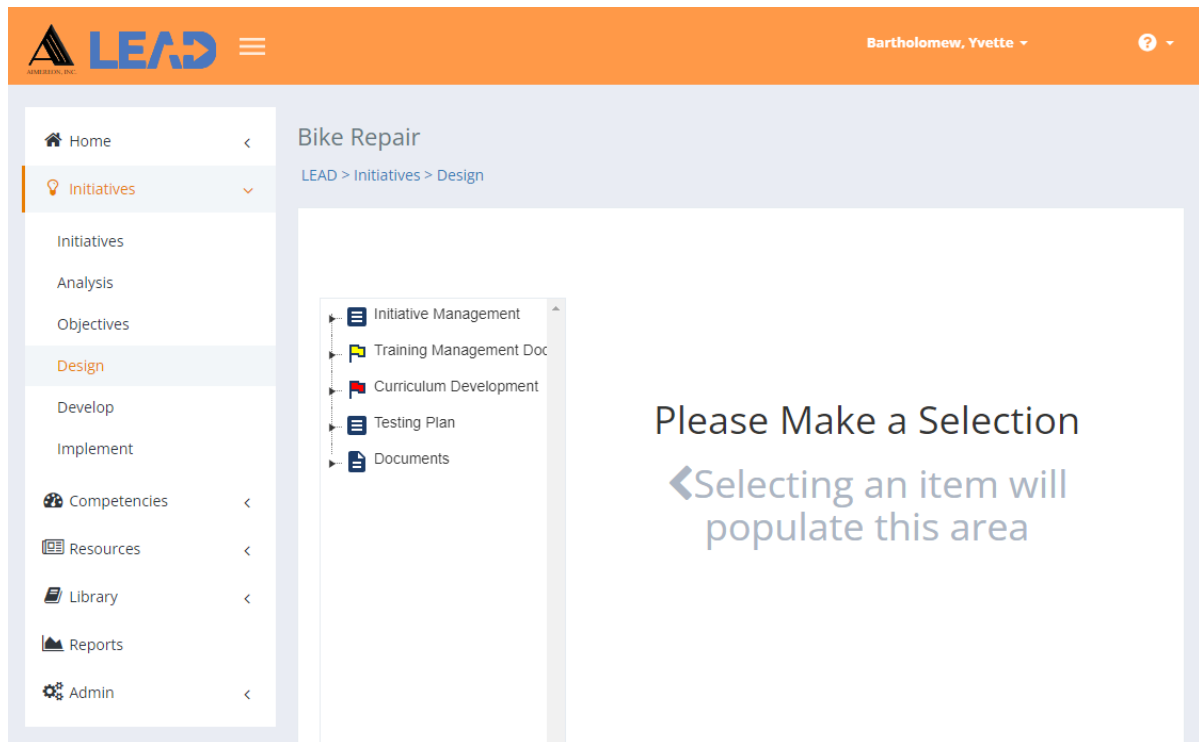




Figure 43: Initiatives > Design

On this screen:

- Use the tree structure to expand out the five main folders and get to the data you need to work with.
- To make more room to see items in the tree structure, click and drag the bottom right corner of the tree window (or frame).
- To make even more room, click on the three-bar icon  next to LEAD in the header bar to minimize the main menu to show only the icons. To see all of the menu items again, click on the three-bar icon again.
- Select a folder and then *Expand*  to open up the folders beneath the selected folder:
 - Selecting the *Initiative Management* folder and then *Expand* opens up all the sub-folders.
 - Selecting the *Training Management Document* folder and then *Expand* opens up all the sub-folders, including those under *Training Data* and *Initiative Locations*. Selecting *Training Data* or a specific *Initiative Location* and then *Expand* opens just that folder.
 - Selecting the *Curriculum Development* folder and then *Expand* opens up the table of contents structure of your initiative. Selecting any table of contents item and then *Expand* opens just that table of contents down to the lowest level.
 - Selecting the *Testing Plan* folder and then *Expand* opens it up to the lowest folder.

- Selecting the *Documents* folder and then *Expand* opens up all the available output options.

3.4.1 Initiative Management

When you click on the *Initiative Management* folder, you can view information about the initiative. You can access the *Initiative Management* folder from both the *Initiatives > Analysis* and the *Initiatives > Design* screens.

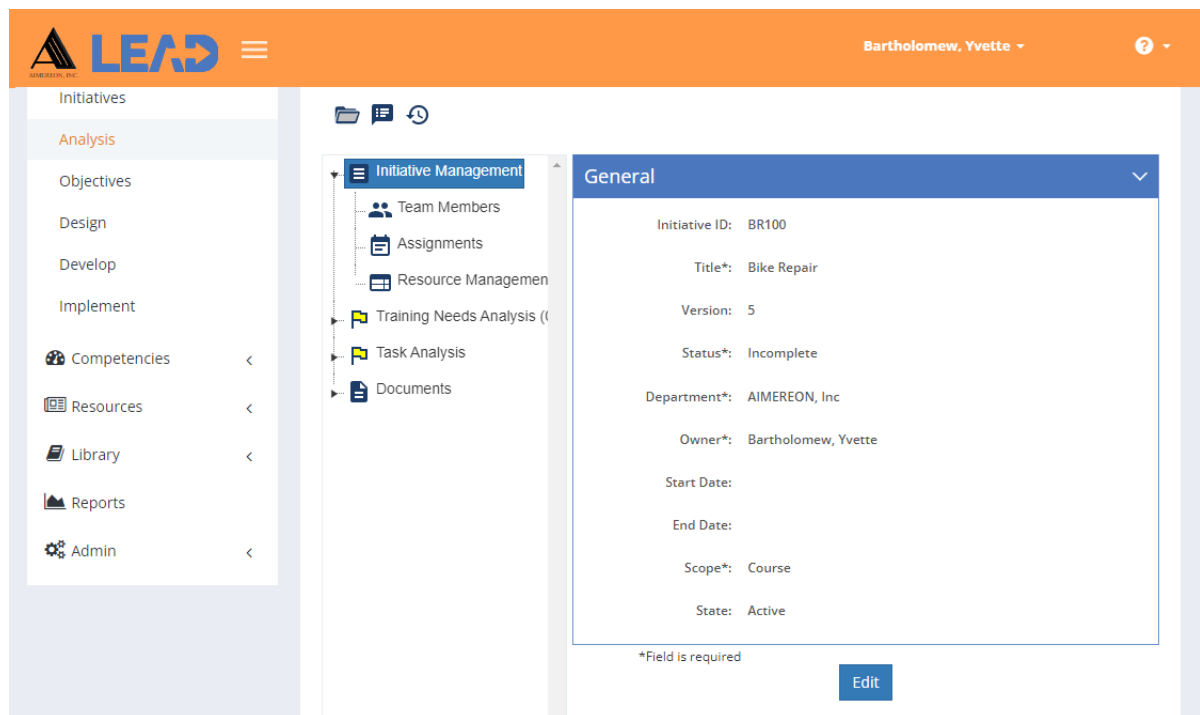


Figure 11: Analysis/Design > Initiative Management

3.4.1.1 Team Members

The *Team Members* screen lists the users currently assigned to the initiative. You can access this folder from both the *Initiatives > Analysis > Initiative Management* and the *Initiatives > Design > Initiative Management* screens.

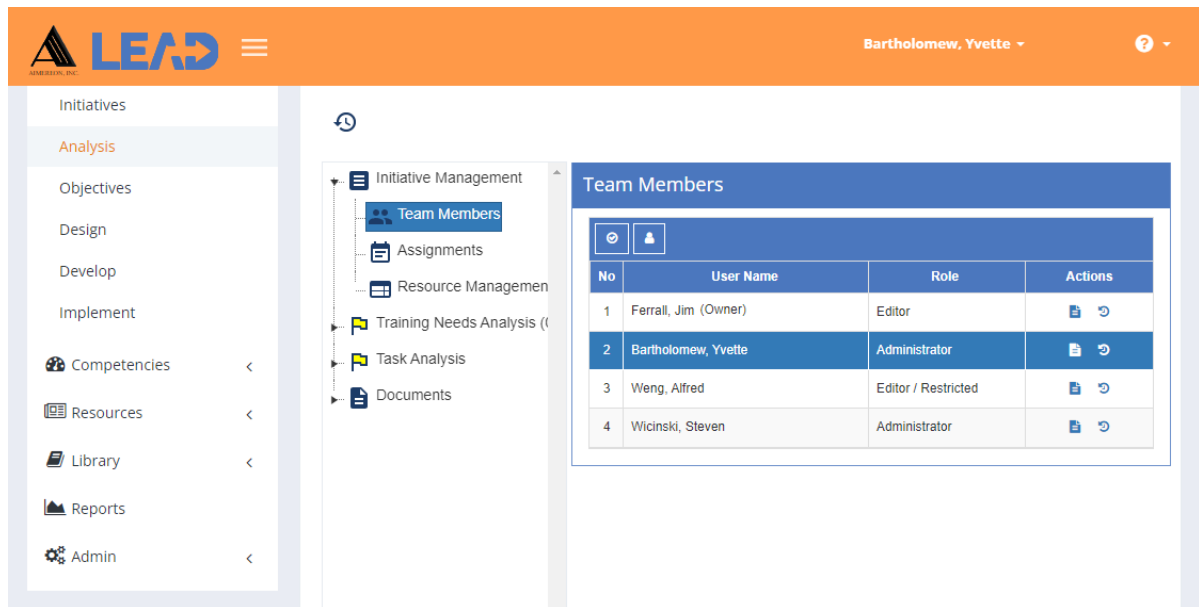


Figure 12: Initiative Management > Team Members

3.4.1.2 Assignments

The *Assignments* screen lists all the assignments that have been created for the initiative. You can access this screen from both the *Initiatives > Analysis > Initiative Management* and the *Initiatives > Design > Initiative Management* screens.

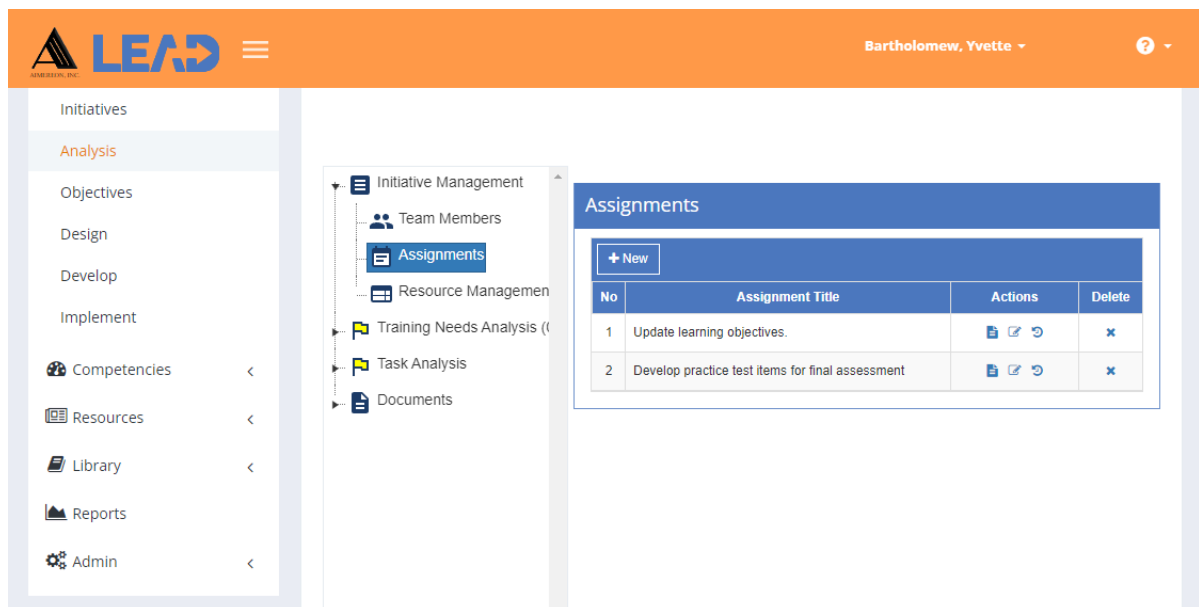






Figure 13: Initiative Management > Assignments

On this screen you can:

- Add a **+ New** assignment to the existing list by selecting + New.

- Select an assignment and:
 - View  the detailed information of the assignment.
 - Edit  the assignment information.
 - Select [Show History](#)  to review the changes made to the assignment, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - Delete  an assignment. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

3.4.1.3 Resource Management

On the Resource Management screen, you can review, view, and update any resources that are cited anywhere in the initiative. This includes resources cited in the:

- *TNA* or *TMD Resources* screen under the *Training Data* folder, or for a specific *Initiative Location*.
- *Task Analysis* for a *Task*, *Subtask*, or *Step*.
- And on the *Develop* tab:
 - *Sub-Elements: Page / Paragraph / Caution / Note / Warning*.
 - *Sheets*.
 - *Certain Test Items*.
 - *Storyboard*.
 - *Test Instructions*.

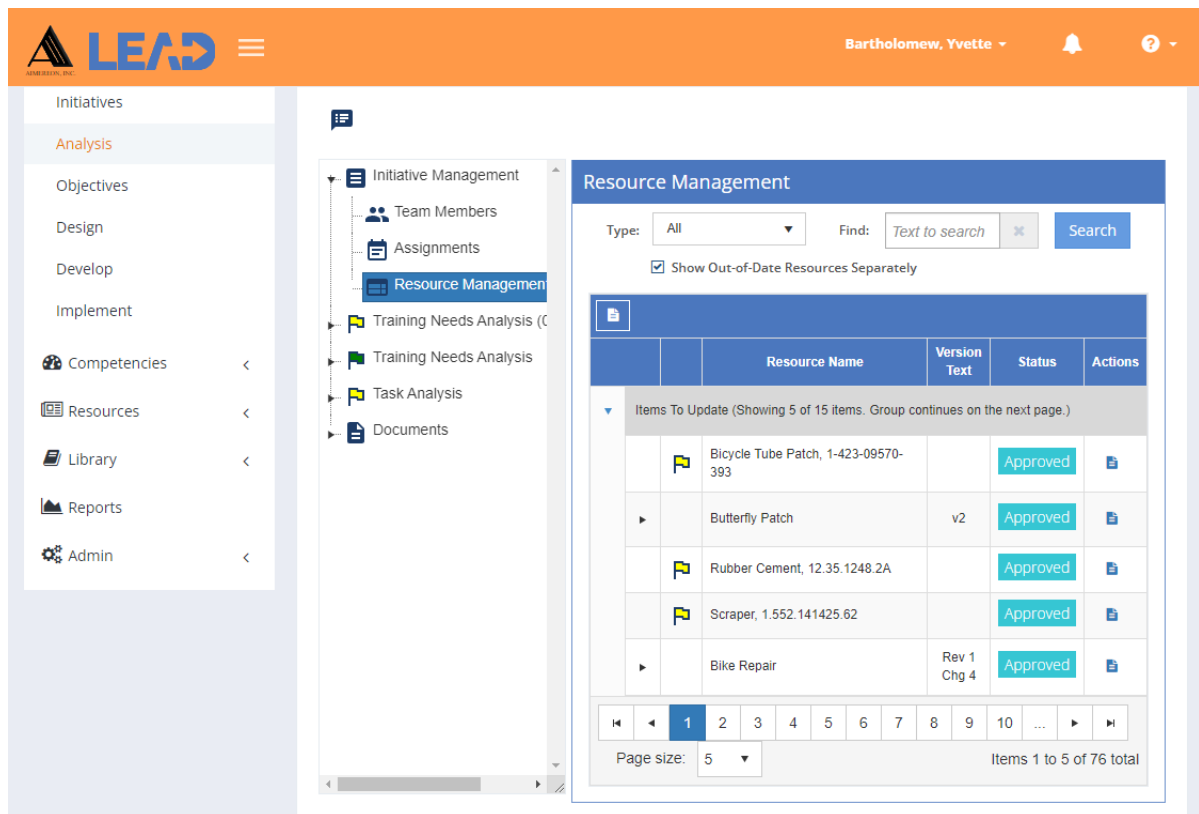










Figure 14: Initiative Management > Resource Management

On this screen:

- Select [View Comments](#)  to view, edit, and add to the comments about the listed resources.
- Use the *Type* drop-down to limit the list of resources to a specific sub-category, as set up on [Customizations](#)  screens.
- Enter a search term in the *Find:* field and select *Search* to list all resources that contain your search term on the screen. Select  to clear the search term and view all items again.
- Select the *Show Out-of-Date Resources Separately* check box to see those outdated resources at the top of the list grouped under: *Items to Update*.
- *Preview*  a spreadsheet listing *All* cited resources, or the *Missing File Resources* spreadsheet listing all IETMs with a *Comparison File* that is listed with the IETM but cannot be found on the server and all IMMs with an *Associated File* that is listed with the IMM but cannot be found on the server.
- View the different versions of a resource by clicking on the arrow ► in the first column.
- Select a resource and then *Preview*  to generate the:

- *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
- *Impact Report* that lists every place within the initiative where *any previous version* of the selected resource is cited or used.
- *All Resources* spreadsheet listing all cited resources.
- *Missing File Resources* spreadsheet listing all IETMs with a *Comparison File* that is listed with the IETM but cannot be found on the server and all IMMs with an *Associated File* that is listed with the IMM but cannot be found on the server.
- Select a resource and then:
 - *Update*  to the latest version of a resource.
 - *View*  the resource information.
 - *Edit*  the resource information if the resource is not approved.
Note: This will update the resource everywhere it is used in LEAD.

You can click on the column header to sort the entries. Clicking on the column header again, will reverse the sort. Small arrows in the column header let you know which way the data is currently sorted.

3.4.2 Training Management Document

The *Training Management Document* (TMD) is the output of the Design phase that outlines the content, structure, and management information for the initiative. Several fields are shared with the *Training Needs Analysis* (TNA) and are editable in both areas, until the TNA is approved. Once the TNA has been approved, changes to the shared fields will only be reflected in the TMD.

Shared fields include the *Changes from Previous Version* tab on *Justification* screen, as well as the *Initiative Overview*, *Target Audience*, *Qualification Earned*, and *Associated Learning Events* fields, and the information under the *Training Data* folder. The TMD adds *Foreword* and *Purpose of Initiative* fields, along with a *Schedule* of the learning events under the *Training Data* folder.

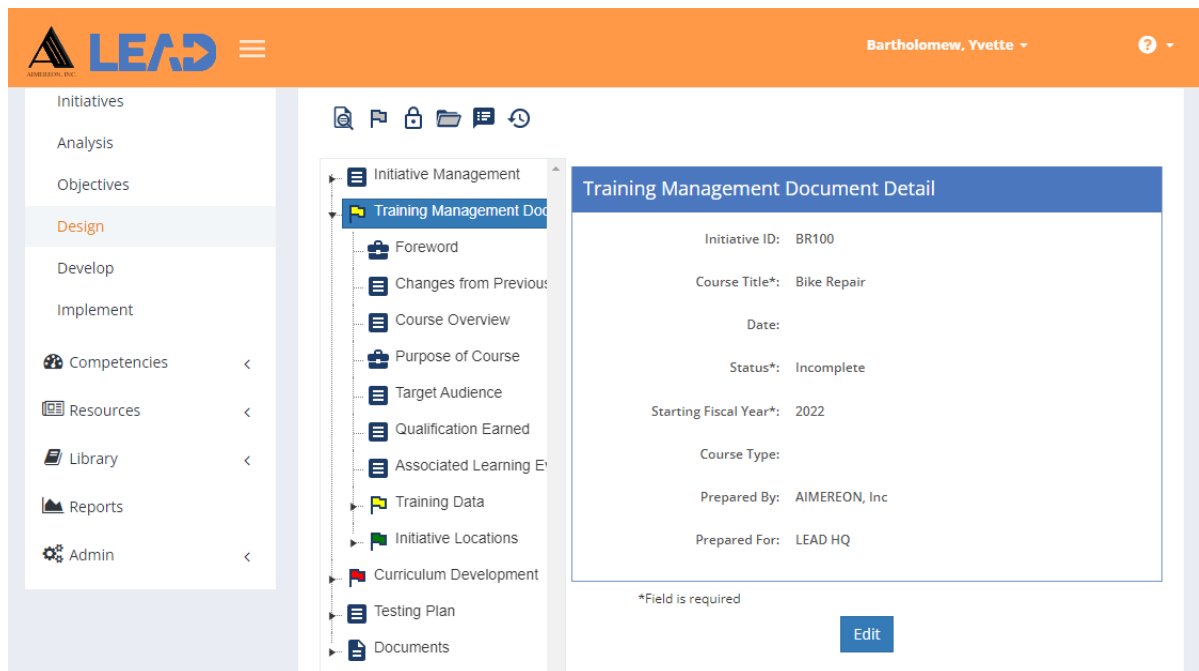










Figure 44: Design > Training Management Document

On this screen, you can:

- [Preview](#)  the TMD.
- Select [Explain Flag](#)  to review the reasons the TMD has been flagged.
- [Lock](#)  the TMD to prevent edits from taking place.
- [Unlock](#)  a locked TMD to allow edits to take place again.
- [Expand](#)  all sub-folders at once, including those under *Training Data* and *Initiative Locations*, to capture the information required for the TMD.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- [View](#) the information by selecting the Training Management Document folder.
- Select [Edit](#)  the information about the TMD and initiative. Once you've finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* to discard the changes.

3.4.2.1 Foreword (TMD Only)

On the *Foreword* screen, you can explain any unique aspects of the learning event, which may not be clear from the information that is provided in the rest of the document.

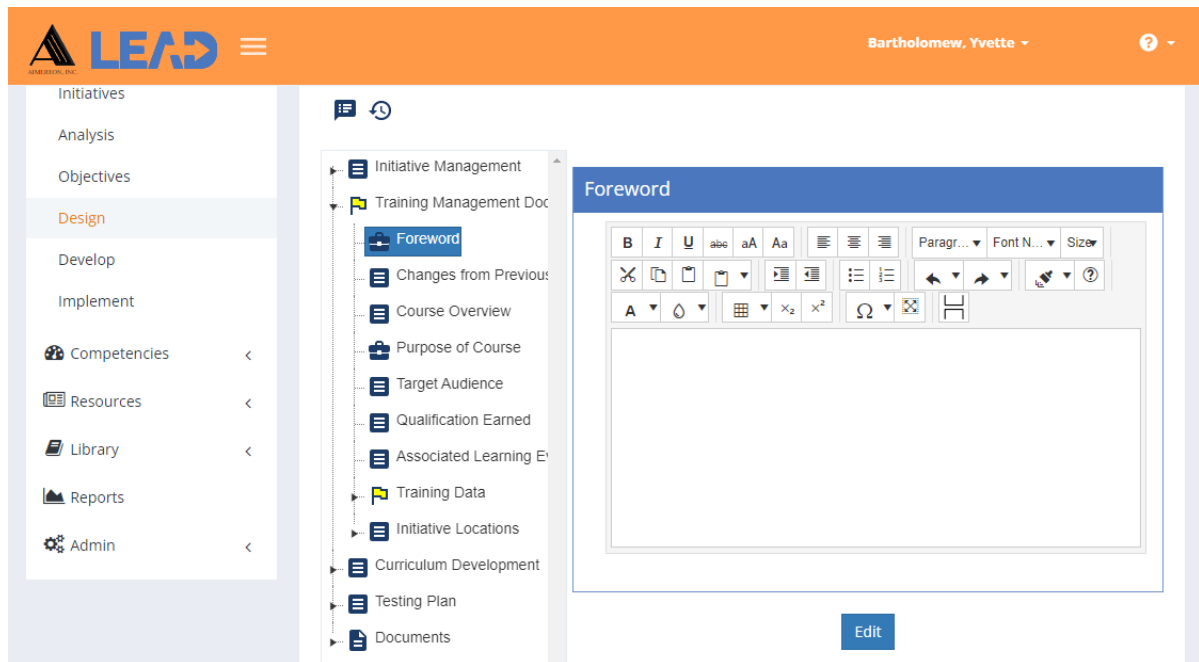




Figure 45: TMD > Foreword

You can:

- View the foreword by clicking on the *Foreword* folder.
- Edit the information ([Editor Help](#))²¹². Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.2 Changes from Previous Version (TMD Only)

The *Changes from Previous Version* lists the required and recommended changes to the new version of the existing learning event.

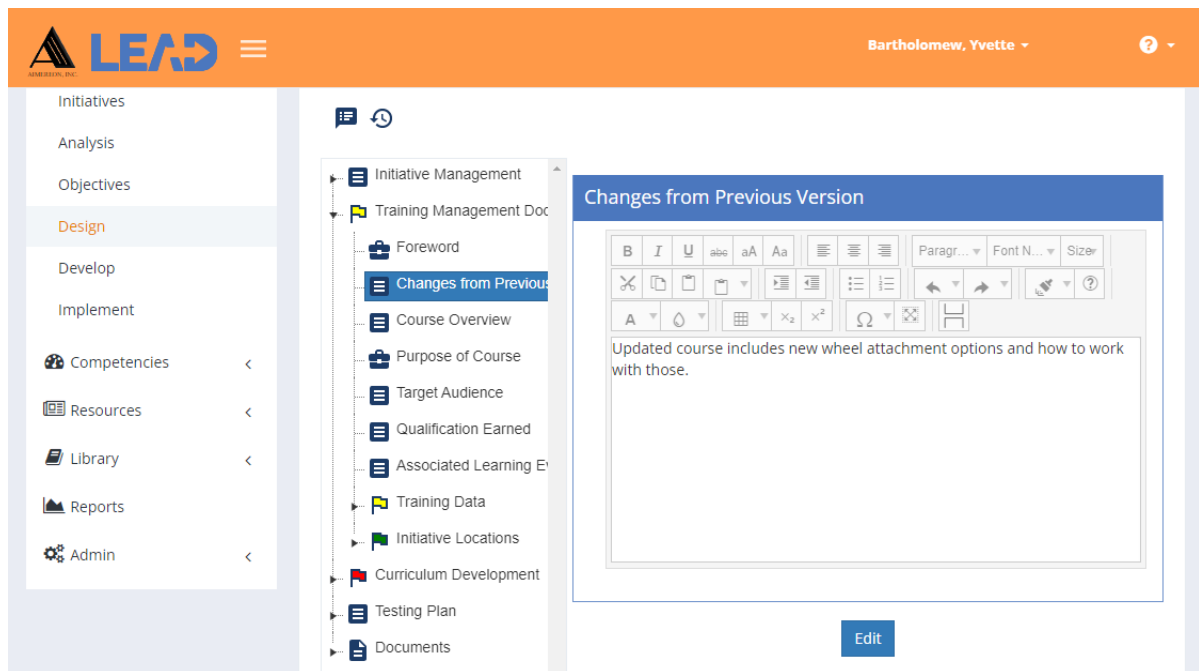




Figure 46: TMD > Changes from Previous Version

You can:

- View the information by clicking on the *Changes from Previous Version* folder.
- Edit the information ([Editor Help](#))²¹². Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.3 Initiative Overview (TNA and TMD)

On the *Initiative Overview* screen, you can enter a description, or overview, of the proposed learning event that will close the performance gap.

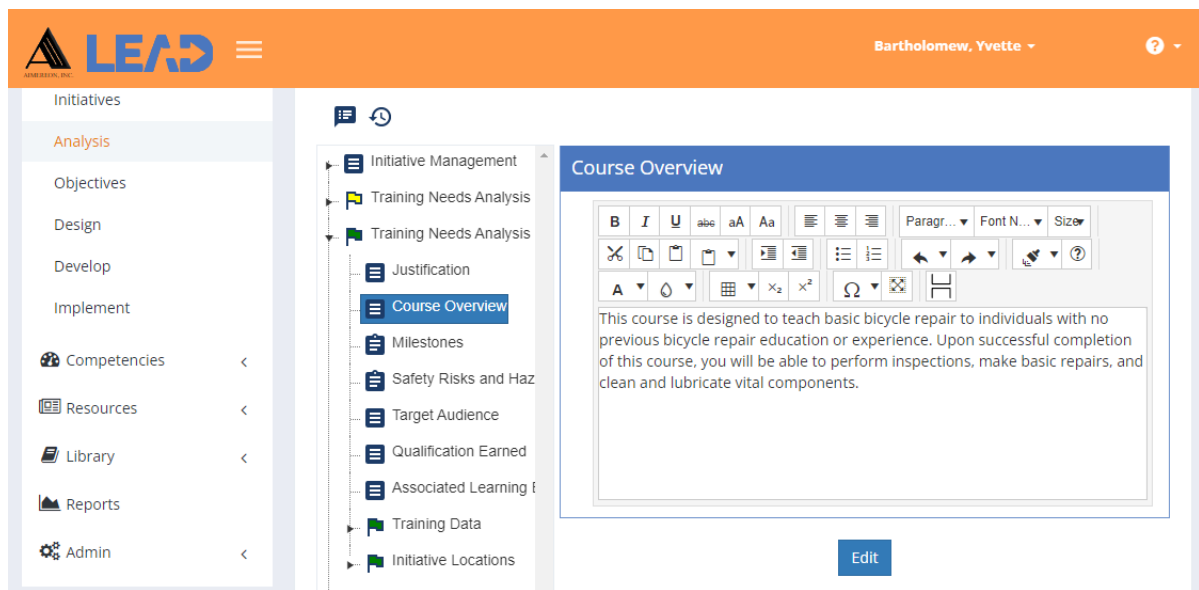


Figure 17: TNA/TMD > Initiative Overview

You can:

- View the information by clicking on the *Initiative Overview* folder.
- Edit the information ([Editor Help](#))²¹². Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸ to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰ to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.4 Purpose of Initiative (TMD Only)

On the *Purpose of Initiative* screen, you can provide a summary of the reasons why the initiative is being/or has been developed from the training needs analysis. This can help someone unfamiliar with the initiative with some background information.

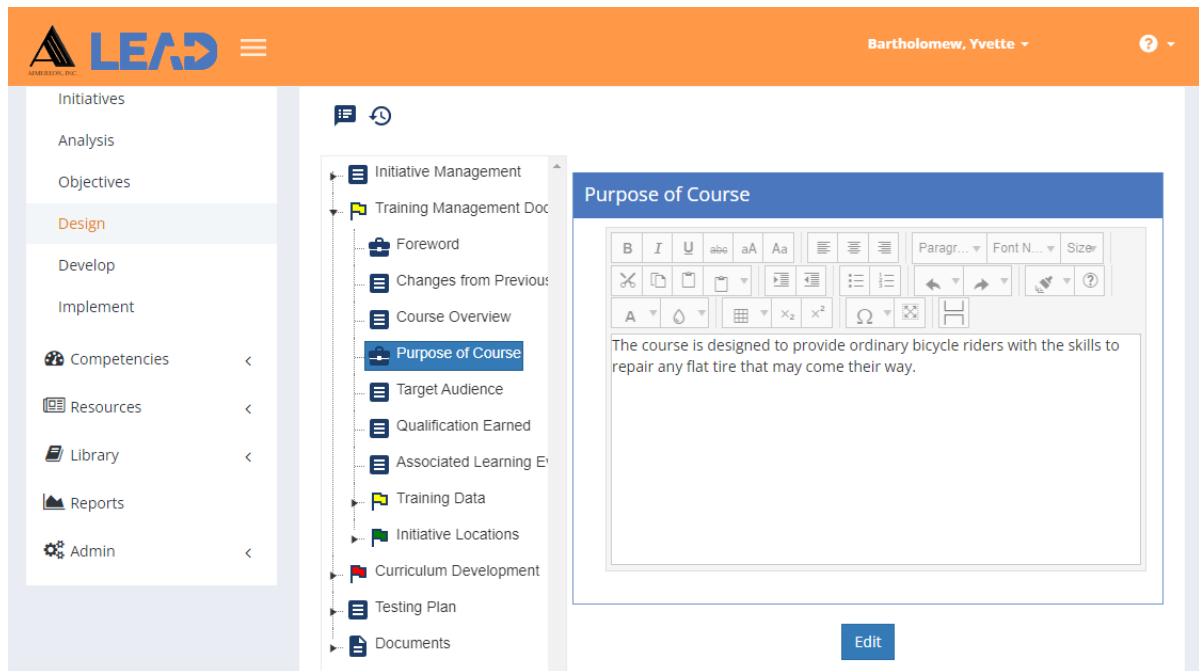




Figure 47: TMD > Purpose of Initiative

You can:

- View the information by clicking on the *Purpose of Initiative* folder.
- Edit the information ([Editor Help](#))²¹². Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.5 Target Audience (TNA and TMD)

On the *Target Audience* screen, you can describe who the learning event is for and how many people are in the target audience.

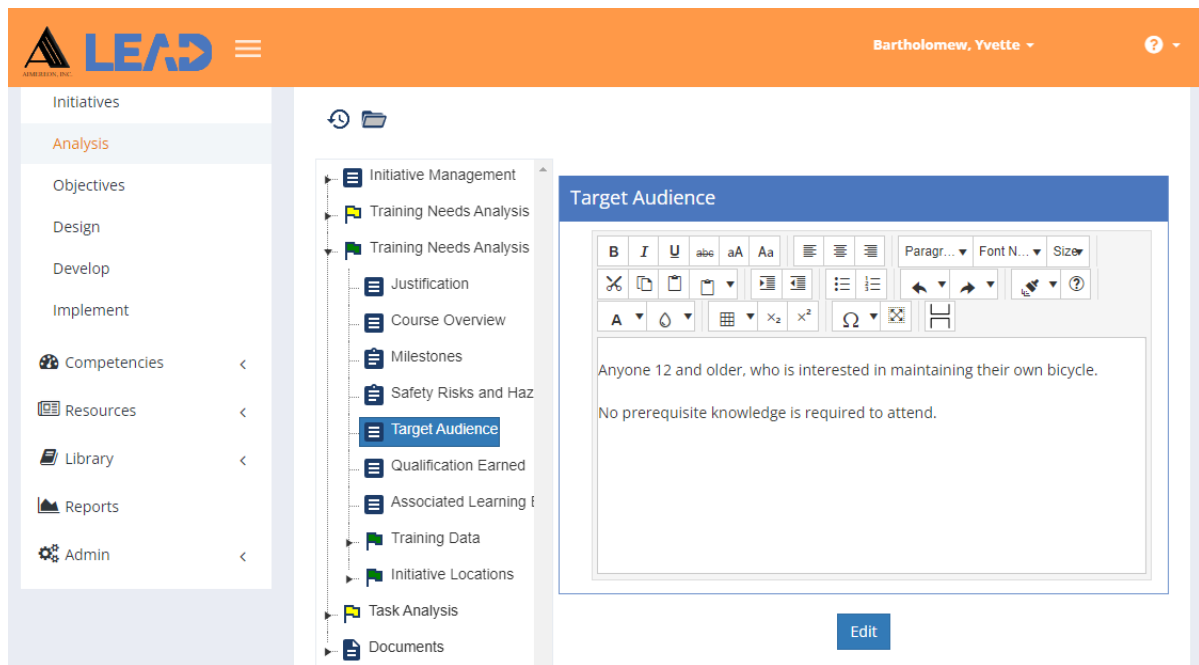


Figure 20: TNA/TMD > Target Audience

You can:

- View the information by clicking on the *Target Audience* folder.
- [Edit](#)²¹² the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸ to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰ to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.6 Qualification Earned (TNA and TMD)

On the *Qualification Earned* screen, you can list any qualification(s) or certification(s) that a participant earns by completing the learning event.

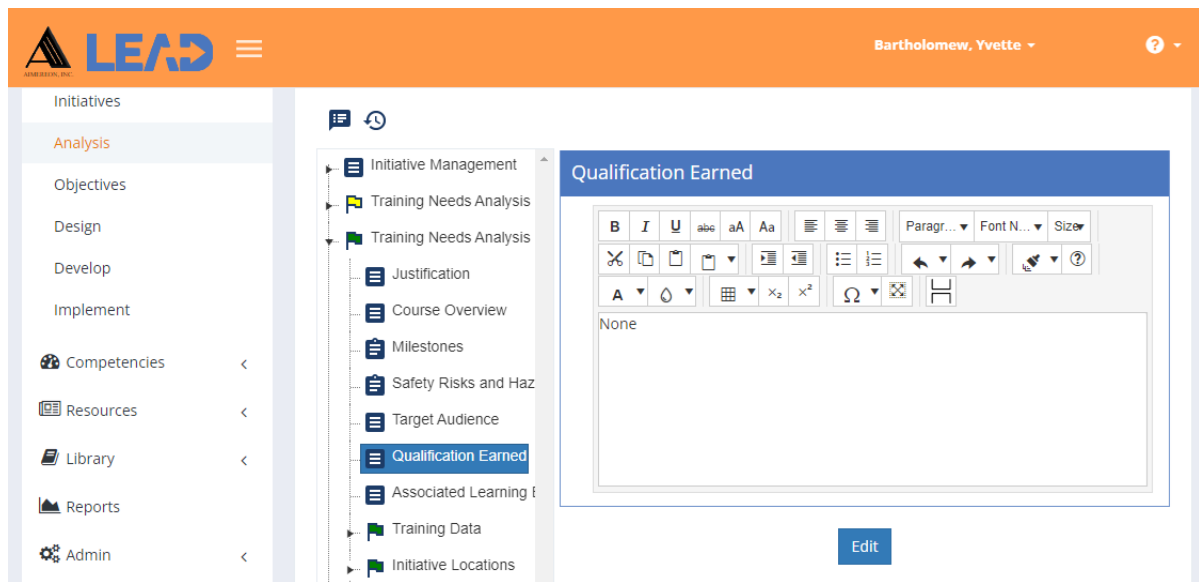




Figure 21: TNA/TMD > Qualification Earned

You can:

- View the information by clicking on the *Qualification Earned* folder.
- [Edit](#)²¹² the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.7 Associated Learning Events (TNA and TMD)

On the *Associated Learning Events* screen, you can list any associated learning events to the current initiative, including:

- Prerequisite learning events that participants must or should complete before they can attend this learning event or initiative.
- Equivalent learning events that participants can complete instead of this learning event or initiative.
- Follow-on learning events that participants can or should complete after they completed this learning event or initiative.

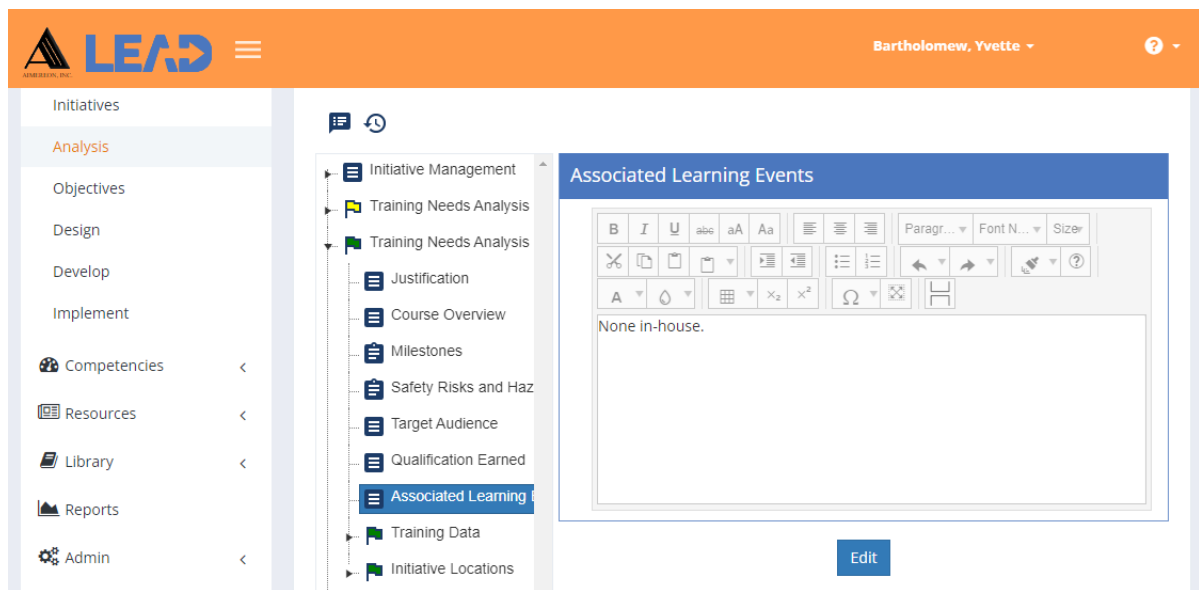




Figure 22: TNA/TMD > Associated Learning Events

You can:

- View the information by clicking on the *Associated Learning Events* folder.
- [Edit](#)²¹² the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.8 Training Data (TNA and TMD)

The *Training Data* screen lists the current and planned data for the learning event, including expected length, number of hours, minimum and maximum capacities, number of convenings (how often the learning event will be delivered), and the expected throughput of participants. All data from the *Training Data* screen and sub-folders will be copied to any newly added [Initiative Location](#)⁴⁹.





| | Current | Planned |
|---------------------------------|---------|---------|
| Course Length (in days)*: | 1 | 2 |
| Class Hours*: | 2 | 2 |
| Laboratory Hours*: | 4 | 6 |
| Assessment Hours*: | 2 | 2 |
| Class min. Capacity*: | 2 | 3 |
| Class max. Capacity*: | 10 | 12 |
| Class Convenings*: | 2 | 4 |
| Annual Participant Throughput*: | 20 | 48 |
| Personnel Totals*: | 1 | 2 |

*Field is required





Edit

Figure 23: TNA/TMD > Training Data

You can:

- View the training data.
- *Edit* the training data. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [Explain Flag](#)  to review the reasons the *Training Data* folder has been flagged.
- *Expand*  all the folders underneath *Training Data*.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

In the screens underneath the *Training Data* screen, you can enter information about the:

- [Schedule](#)  for delivering the learning event (in the TMD only).
- [Facilities](#)  needed to deliver the learning event.
- [Funding](#)  needed to develop and/or deliver the learning event.
- [Personnel](#)  needed to deliver the learning event.

- [Resources](#)⁴⁸ needed to deliver the learning event.

3.4.2.8.1 Schedule (TMD Only)

On the *Schedule* screen, you can assign times to the table of contents of your learning event, specifically *Overview*, *Enabling Objective Level* items, *Summary* and *Assessments*, as well as schedule events that are not linked to a table of contents item (like administrative time or other time you wish to capture in the schedule, like breaks or lunch).

When you *Edit* the schedule, for each schedule event you can enter when the event should take place (week and day), select the type of event it is, enter a time in hours and minutes, and the instructor or facilitator to participant ratios. You can have more than one type of event per schedule item by adding additional schedule events for that schedule item.

| Number | Title | Week | Day | Type | Delivery Method | Length (H:MM) | Ratio |
|--------|---------------|------|-----|------------|-----------------|-----------------------------------|--------|
| 1-1-1 | Front Wheel | 0 | 0 | Classroom | IMI | 0 : 20 | 12 : 1 |
| 1-1-1 | Front Wheel | 0 | 0 | Laboratory | IMI | 1 : 00 | 12 : 1 |
| 1-1-2 | Rear Wheel | 0 | 0 | Classroom | Instructor-Led | 0 : 20 | 12 : 1 |
| 1-1-2 | Rear Wheel | 0 | 0 | Laboratory | Instructor-Led | 1 : 00 | 12 : 1 |
| 1-2-1 | Tube Removal | 0 | 0 | Classroom | Instructor-Led | 0 : 20 | 12 : 1 |
| 1-2-1 | Tube Removal | 0 | 0 | Laboratory | Instructor-Led | 1 : 00 | 12 : 1 |
| 1-2-2 | Hole Repair | 0 | 0 | Classroom | Instructor-Led | 0 : 20 | 12 : 1 |
| 1-2-2 | Hole Repair | 0 | 0 | Laboratory | Instructor-Led | 1 : 00 | 12 : 1 |
| 1-3-1 | Tube and Tire | 0 | 0 | Classroom | IMI | 0 : 20 | 12 : 1 |
| 1-3-1 | Tube and Tire | 0 | 0 | Laboratory | IMI | 1 : 00 | 12 : 1 |
| 1-3-2 | Wheel | 0 | 0 | Classroom | Instructor-Led | 0 : 20 | 12 : 1 |
| 1-3-2 | Wheel | 0 | 0 | Laboratory | Instructor-Led | 1 : 00 | 12 : 1 |
| | | | | | | Total of 8 hour(s) 0 minute(s) | |

Figure 48: TMD > Training Data > Schedule



3.4.2.8.2 Facilities (TNA and TMD)

The *Facilities* screen provides you with several fields to describe what facilities are needed to deliver or conduct the learning event. This could be a simple description of the room (or other spaces) needed, to a description of new construction that is needed for this learning event.

The screenshot displays the LEAD system interface. On the left is a navigation menu with categories: Initiatives, Analysis, Objectives, Design, Develop, Implement, Competencies, Resources, Library, Reports, and Admin. The 'Analysis' category is selected, and the 'Training Needs Analysis' folder is expanded. Within this folder, the 'Facilities' item is highlighted. The main content area shows the 'Facility Detail' form. This form includes fields for 'Funding Amount' (set to \$500), 'Shortfall Amount' (set to \$50), and 'Source of Funding' (set to Training Fund). Below these is a 'Facilities Notes' section with a rich text editor containing the text: 'Need a workshop, a classroom would be nice to have in addition.' At the bottom of the form, there is a note '*Field is required' and an 'Edit' button.

Figure 24: TNA/TMD > Training Data > Facilities

On this screen you can:

- View the facility information by selecting *Facilities* under the *Training Data* folder.
- *Edit* the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#) ²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#) ²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.8.3 Funding (TNA and TMD)

The *Funding* screen provides you with several fields to list the funding needed to develop and deliver or conduct the learning event over five fiscal (or financial) years. The starting fiscal year is set on the *Training Needs Analysis* screen. You can change this at any time. Changing the *Starting Fiscal Year* will NOT delete any funding information on the *Training Data > Funding* screen, so if you changed the year by mistake you can return to the previous selected year without any loss of data. The fiscal year used in LEAD is whatever fiscal year your organization uses.

Funding

Funding Amount: \$2,000

Shortfall Amount: \$0

Source of Funding: Training Funds

| Appropriation | Activity Group | Expense | FY 2022 | FY 2023 | FY 2024 | FY 2025 | FY 2026 |
|---------------|----------------|---------|---------|---------|---------|---------|---------|
| 2022 | TR | P | \$0 | \$500 | \$500 | \$500 | \$500 |
| 20200 | TR | S | \$0 | \$500 | \$500 | \$500 | \$500 |

Funding Notes:

Printing and supplies needed to conduct training.





*Field is required

Edit

Figure 25: TNA/TMD > Training Data > Funding

On the *Funding* screen you can:

- View the funding information by selecting *Funding* under the *Training Data* folder.
- *Edit* the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
 - Add a **+ New** funding or expense row to the table.
 - *Delete* a **✕** funding or expense row from the table.

- Select [View Comments](#)   to view, edit, and add to the comments.
- Select [Show History](#)   to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.8.4 Personnel (TNA and TMD)

The *Personnel* screen provides you with several fields to describe the number of personnel needed to deliver or conduct the learning event, including any expected shortfall of personnel and the source of the personnel. In LEAD, you can list the personnel requirements for four types of personnel:

- *Contractor* - anyone you hire specifically to deliver or conduct the learning event, the funding for which you would list in the *Funding* screen table.
- *Facilitator* - someone who facilitates the learning event and is employed by your organization.
- *Instructor* - someone who instructs the learning event and is employed by your organization.
- *Support* - someone that supports the delivery of the learning event, whether that's safety personnel, administrative support, testing support, or some other kind of support.

Personnel

Number of Personnel: 2
 Personnel Shortfall: 1
 Personnel Source: Service/Maintenance Departments

| | Personnel Type | FY 2022 | FY 2023 | FY 2024 | FY 2025 | FY 2026 |
|---|----------------|---------|---------|---------|---------|---------|
| ▼ | Instructor | | | | | |
| | Required | 1 | 2 | 2 | 2 | 2 |
| | Authorized | 1 | 1 | 0 | 0 | 0 |
| | Delta | 0 | 1 | 0 | 0 | 0 |
| ▼ | Facilitator | | | | | |
| | Required | 0 | 0 | 0 | 0 | 0 |
| | Authorized | 0 | 0 | 0 | 0 | 0 |
| | Delta | 0 | 0 | 0 | 0 | 0 |
| ▼ | Contractor | | | | | |
| | Required | 0 | 0 | 0 | 0 | 0 |
| | Authorized | 0 | 0 | 0 | 0 | 0 |
| | Delta | 0 | 0 | 0 | 0 | 0 |
| ▼ | Support | | | | | |
| | Required | 1 | 1 | 1 | 1 | 1 |
| | Authorized | 1 | 1 | 1 | 1 | 1 |
| | Delta | 0 | 0 | 0 | 0 | 0 |

Notes:



Support person is required to handle course administration. Two instructors are needed to conduct the course and supervise the enhanced lab sections. An additional instructor will be trained from the existing personnel.

*Field is required

Edit

Figure 26: TNA/TMD > Training Data > Personnel

On this screen you can:

- View the personnel information by selecting *Personnel* under the *Training Data* folder.
- Edit the information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.8.5 Resources (TNA and TMD)

The *Resources* screen provides you with the ability to add any resources needed to deliver or conduct the learning event. You can select resources on this screen that you anticipate needing and LEAD will add to this list of resources when you select them during development.

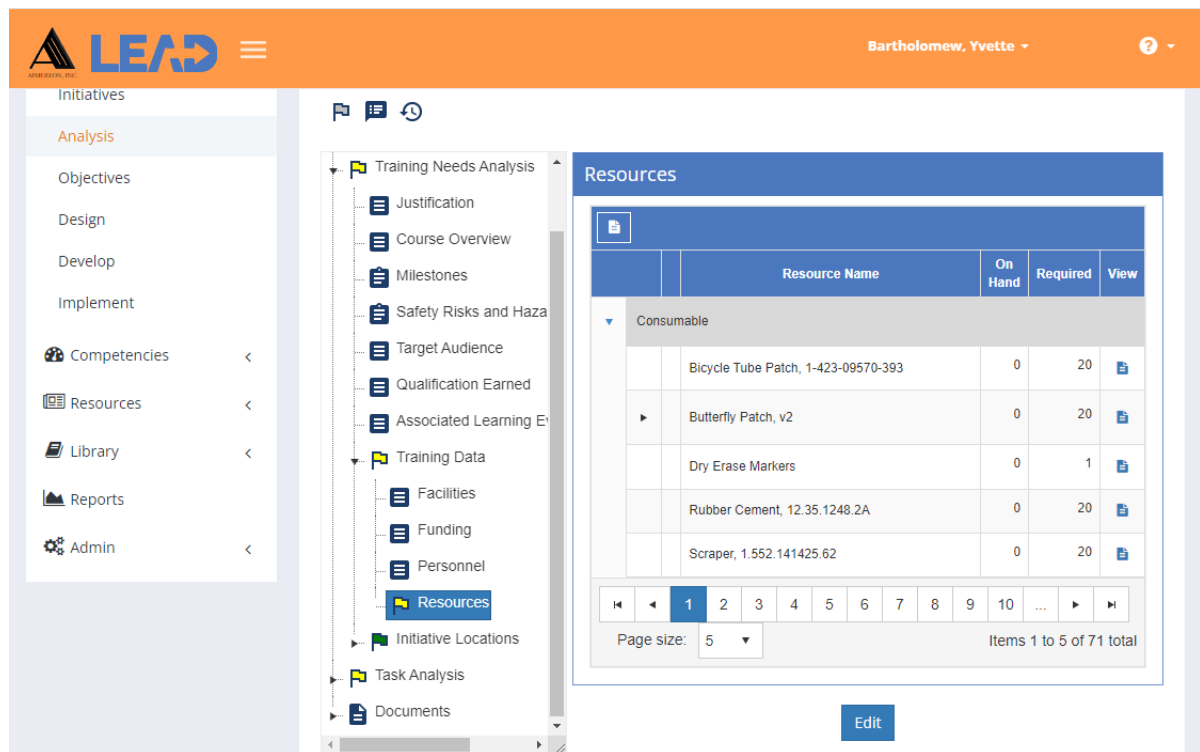










Figure 27: TNA/TMD > Training Data > Resources

On this screen you can:

- Select [Explain Flag](#)  to review the reasons the list of resources has been flagged.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- Select [Preview](#)  to generate the:
 - *Uncited Resources Report*. A spreadsheet that lists all resources in the *Resources* table that are **not** cited in the selected areas in the initiative. On the *Output Options* screen that pops-up, you can choose to check for resources **not** cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but listed in the *Resources* table.

- *Unlisted Resources Report*. A spreadsheet that lists all resources cited in the selected areas in the initiative and that are **not** in the *Resources* table. On the *Output Options* screen that pops-up, you can choose to check for resources cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but not listed in the *Resources* table.
- Select a resource and then:
 - *Preview*  to generate the:
 - *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
 - *Impact Report* that lists every place within the initiative where *any previous version* of the selected IETM is cited or used.
 - *Uncited Resources Report*. A spreadsheet that lists all resources in the *Resources* table that are **not** cited in the selected areas in the initiative. On the *Output Options* screen that pops-up, you can choose to check for resources **not** cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but listed in the *Resources* table.
 - *Unlisted Resources Report*. A spreadsheet that lists all resources cited in the selected areas in the initiative and that are **not** in the *Resources* table. On the *Output Options* screen that pops-up, you can choose to check for resources cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but not listed in the *Resources* table.
 - *Update*  to the latest version of a resource.
 - View the different versions of a resource by clicking on the arrow ► in the first column.
 - Select *Explain Flag*  to review the reasons the selected resource has been flagged.
 - *View*  the selected resource.
- *Edit* the resource list.

3.4.2.9 Initiative Locations (TNA and TMD)

On the *Initiative Locations* screen, you can select the initiative locations where training will take place. All data from the *Training Data* screen and sub-folders will be copied to a newly selected initiative location.

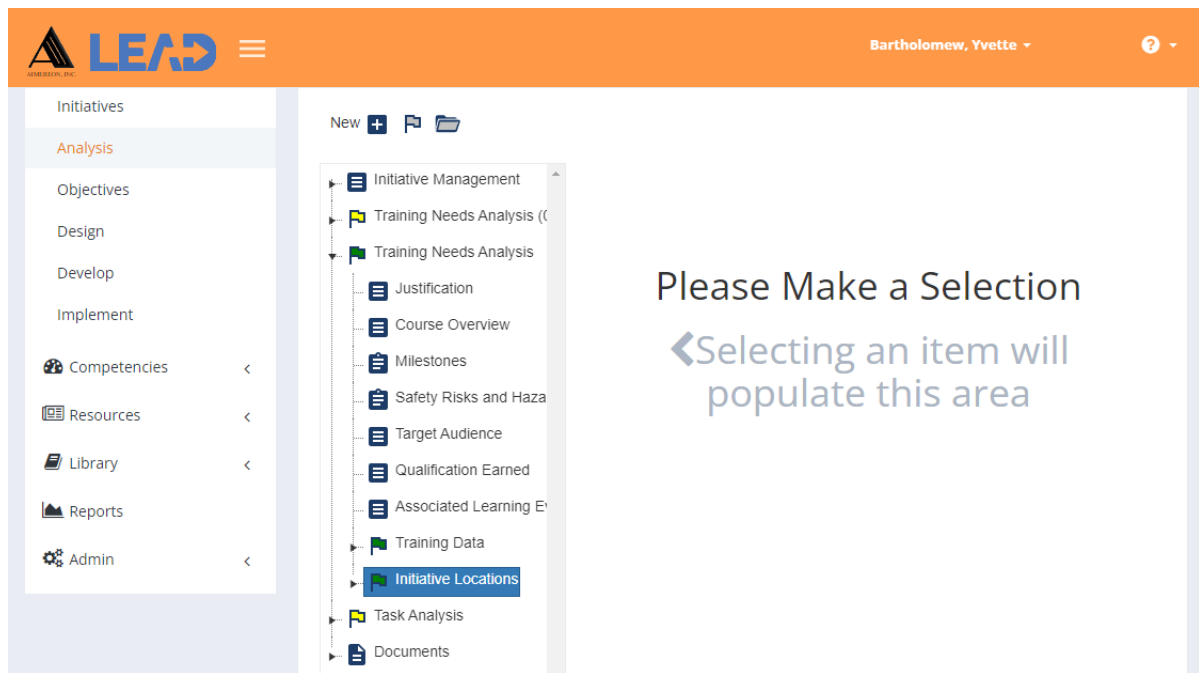






Figure 28: TNA/TMD > Initiative Locations

On this screen you can:

- Add a **New**  initiative location to the TNA or TMD. *Initiative Locations* are created on the [Admin > Locations](#)  screen.
- Select [Explain Flag](#)  to review the reasons the *Initiative Locations* folder has been flagged.
- *Expand*  all the sub-folders of all initiative locations.

3.4.2.9.1 Selected Initiative Location (TNA and TMD)

The *[Selected Initiative Location]* screen lists the current and planned data for the initiative location, including expected length, number of hours, minimum and maximum capacities, number of convenings (how often the learning event will be delivered), and the expected throughput of participants at that initiative location.

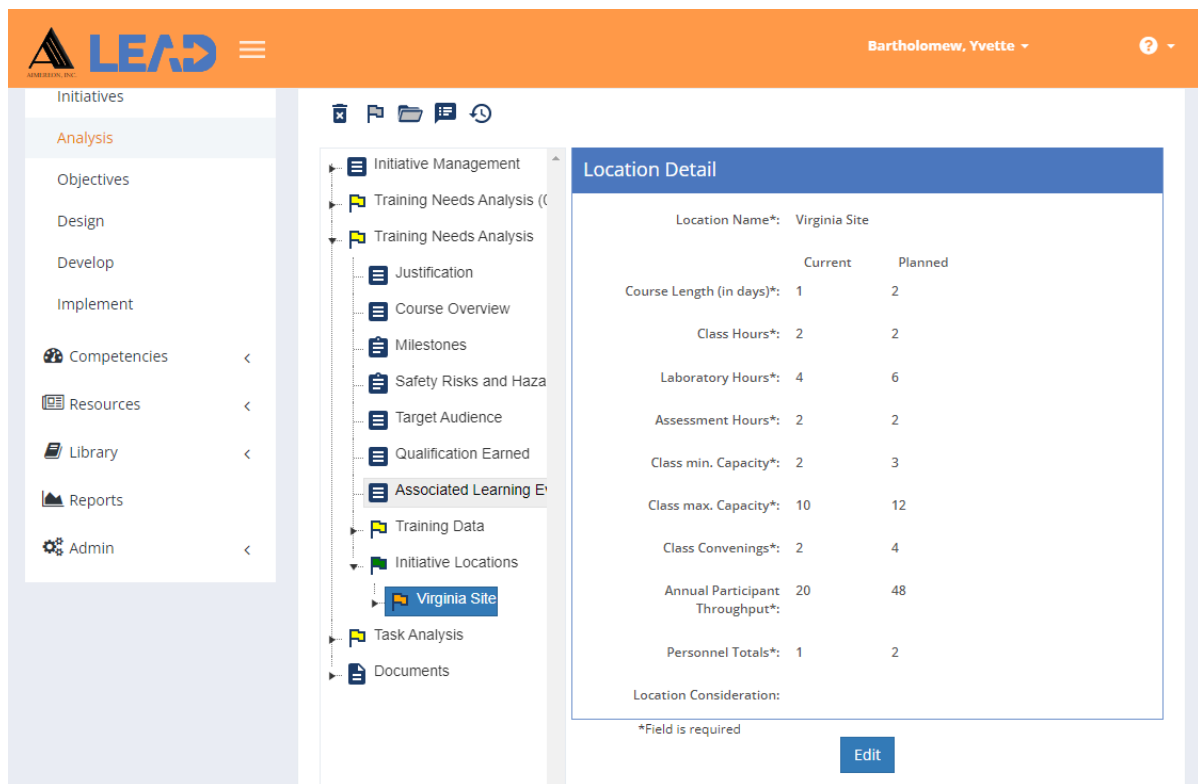







Figure 29: TNA/TMD > [Selected] Initiative Location

On this screen, you can:

- View the initiative location's information.
- Edit the initiative location's information. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Delete  the selected initiative location from the initiative. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- Select [Explain Flag](#)  to review the reasons the initiative location has been flagged.
- Expand  all the folders underneath a selected initiative location.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the initiative location, including the user name and date/time of saved changes, and revert to an earlier saved revision.

In the screens underneath the selected initiative location, you can enter information about the:

- [Schedule](#)¹⁰⁰ for delivering the learning event (in the TMD only).
- [Facilities](#)⁵² needed to deliver the learning event at that initiative location.
- [Funding](#)⁵³ needed to deliver the learning event at that initiative location.
- [Personnel](#)⁵⁵ needed to deliver the learning event at that initiative location.
- [Resources](#)⁵⁷ needed to deliver the learning event at that initiative location.

3.4.2.9.1.1 Schedule (TMD Only)

On the *Schedule* screen for each Initiative Location, you can edit when the event should take place (week and day) and change the instructor or facilitator to participant ratios of the standard schedule that are set up on the *Schedule* screen under the *Training Data* folder. You can also add additional schedule events for the *Overview*, *Enabling Objective Level* items, *Summary* and *Assessments* entries in the schedule. You can have more than one type of event per schedule item by adding additional schedule events for that schedule item.

| Number | Title | Week | Day | Type | Delivery Method | Length (H:MM) | Ratio |
|--------|---------------|------|-----|------------|-----------------|-----------------------------------|--------|
| 1-1-1 | Front Wheel | 0 | 0 | Classroom | IMI | 0 : 20 | 12 : 1 |
| 1-1-1 | Front Wheel | 0 | 0 | Laboratory | IMI | 1 : 00 | 12 : 1 |
| 1-1-2 | Rear Wheel | 0 | 0 | Classroom | Instructor-Led | 0 : 20 | 12 : 1 |
| 1-1-2 | Rear Wheel | 0 | 0 | Laboratory | Instructor-Led | 1 : 00 | 12 : 1 |
| 1-2-1 | Tube Removal | 0 | 0 | Classroom | Instructor-Led | 0 : 20 | 12 : 1 |
| 1-2-1 | Tube Removal | 0 | 0 | Laboratory | Instructor-Led | 1 : 00 | 12 : 1 |
| 1-2-2 | Hole Repair | 0 | 0 | Classroom | Instructor-Led | 0 : 20 | 12 : 1 |
| 1-2-2 | Hole Repair | 0 | 0 | Laboratory | Instructor-Led | 1 : 00 | 12 : 1 |
| 1-3-1 | Tube and Tire | 0 | 0 | Classroom | IMI | 0 : 20 | 12 : 1 |
| 1-3-1 | Tube and Tire | 0 | 0 | Laboratory | IMI | 1 : 00 | 12 : 1 |
| 1-3-2 | Wheel | 0 | 0 | Classroom | Instructor-Led | 0 : 20 | 12 : 1 |
| 1-3-2 | Wheel | 0 | 0 | Laboratory | Instructor-Led | 1 : 00 | 12 : 1 |
| | | | | | | Total of 8 hour(s) 0 minute(s) | |

[Edit](#)

Figure 49: TMD > Initiative Locations > [Selected Initiative Location] > Schedule

On this screen you can:

- View the schedule by selecting *Schedule* under the *Initiative Location* folder.
- Edit some of the standard schedule information.
- Select [View Comments](#) ²¹⁸ to view, edit, and add to the comments.
- Select [Show History](#) ²¹⁰ to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.9.1.2 Facilities (TNA and TMD)

The *Facilities* screen provides you with several fields to describe what facilities are needed to deliver or conduct the learning event. This could be a simple description of the room (or other spaces) needed, to a description of new construction that is needed for this learning event. When you first add a new *Initiative Location*, the data is copied from the *Training Data > Facilities* screen for you to edit for the specific initiative location.

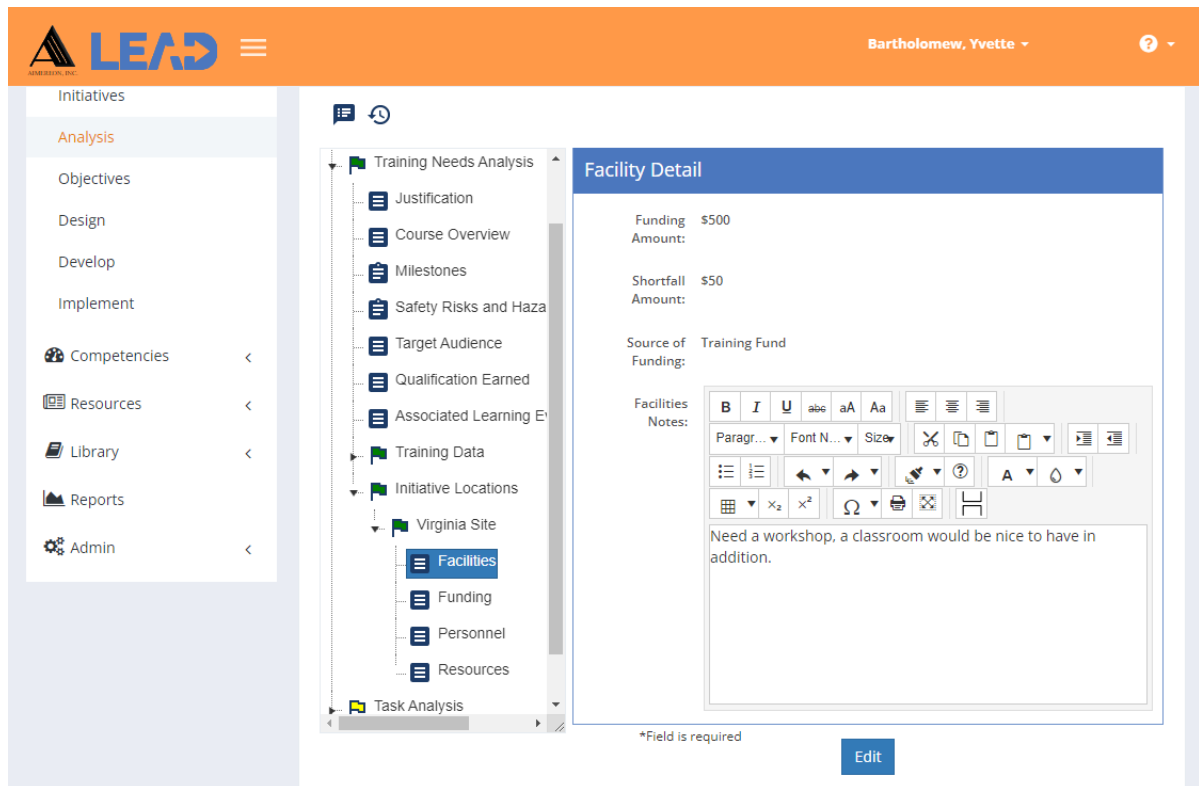




Figure 30: TNA/TMD > Initiative Location > Facilities

On this screen you can:

- View the facility information by selecting *Facilities* under the [Selected Initiative Location] > *Initiative Locations* folder.
- Edit the information copied from the *Training Data > Facilities* screen. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#) ²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#) ²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.9.1.3 Funding (TNA and TMD)

The *Funding* screen provides you with several fields to list the funding needed to develop and deliver or conduct the learning event over five fiscal (or financial) years. The starting fiscal year is set on the *Training Needs Analysis* screen. You can change this at any time. Changing the *Starting Fiscal Year* will NOT delete any funding information on the *Initiative Locations* > [Selected Initiative Location] > *Funding* screen, so if you changed the year by mistake you can return to the previous selected year without any loss of data. The fiscal year used in LEAD is whatever fiscal year your organization uses. When you first add a new *Initiative Location*, the data is copied from the *Training Data* > *Funding* screen for you to edit for the specific initiative location.

The screenshot shows the LEAD system interface. On the left is a navigation menu with categories like Initiatives, Analysis, Objectives, Design, Develop, Implement, Competencies, Resources, Library, Reports, and Admin. The main content area is titled 'Funding' and displays the following information:

- Funding Amount: \$2,000
- Shortfall Amount: \$0
- Source of Funding: Training Funds

Below this is a table showing funding amounts for five fiscal years (FY 2022 to FY 2026) for two activity groups (TR and S).

| Appropriation | Activity Group | Expense | FY 2022 | FY 2023 | FY 2024 | FY 2025 | FY 2026 |
|---------------|----------------|---------|---------|---------|---------|---------|---------|
| 2022 | TR | P | \$0 | \$500 | \$500 | \$500 | \$500 |
| 20200 | TR | S | \$0 | \$500 | \$500 | \$500 | \$500 |





Below the table is a 'Funding Notes' section with a rich text editor. The note contains the text: 'Printing and supplies needed to conduct training.'

At the bottom right, there is an 'Edit' button and a note: '*Field is required'.

Figure 31: TNA/TMD > Initiative Location > Funding

On the *Funding* screen you can:

- View the funding information by selecting *Funding* under the selected *Initiative Location*.
- Edit the information copied from the *Training Data* > *Funding* screen. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.

- Add a  **New** funding or expense row to the table.
- *Delete* a  funding or expense row from the table.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.9.1.4 Personnel (TNA and TMD)

The *Personnel* screen provides you with several fields to describe the number of personnel needed to deliver or conduct the learning event, including any expected shortfall of personnel and the source of the personnel. When you first add a new *Initiative Location*, the data is copied from the *Training Data > Personnel* screen for you to edit for the specific initiative location. In LEAD, you can list the personnel requirements for four types of personnel:

- *Contractor* - anyone you hire specifically to deliver or conduct the learning event, the funding for which you would list in the *Funding* screen table.
- *Facilitator* - someone who facilitates the learning event and is employed by your organization.
- *Instructor* - someone who instructs the learning event and is employed by your organization.
- *Support* - someone that supports the delivery of the learning event, whether that's safety personnel, administrative support, testing support, or some other kind of support.

Personnel

Number of Personnel: 2
 Personnel Shortfall: 1
 Personnel Source: Service/Maintenance Departments

| | Personnel Type | FY 2022 | FY 2023 | FY 2024 | FY 2025 | FY 2026 |
|---|----------------|---------|---------|---------|---------|---------|
| ▼ | Instructor | | | | | |
| | Required | 1 | 2 | 2 | 2 | 2 |
| | Authorized | 1 | 1 | 0 | 0 | 0 |
| | Delta | 0 | 1 | 0 | 0 | 0 |
| ▼ | Facilitator | | | | | |
| | Required | 0 | 0 | 0 | 0 | 0 |
| | Authorized | 0 | 0 | 0 | 0 | 0 |
| | Delta | 0 | 0 | 0 | 0 | 0 |
| ▼ | Contractor | | | | | |
| | Required | 0 | 0 | 0 | 0 | 0 |
| | Authorized | 0 | 0 | 0 | 0 | 0 |
| | Delta | 0 | 0 | 0 | 0 | 0 |
| ▼ | Support | | | | | |
| | Required | 1 | 1 | 1 | 1 | 1 |
| | Authorized | 1 | 1 | 1 | 1 | 1 |
| | Delta | 0 | 0 | 0 | 0 | 0 |

Notes:


Support person is required to handle course administration. Two instructors are needed to conduct the course and supervise the enhanced lab sections. An additional instructor will be trained from the existing personnel.



*Field is required

Edit

Figure 32: TNA/TMD > Initiative Location > Personnel

On this screen you can:

- View the personnel information by selecting *Personnel* under the selected *Initiative Location*.
- Edit the information copied from the *Training Data > Personnel* screen. Once you're finished making the necessary changes, select *Save* to keep the changes, or select *Cancel* without saving any updates you made.
- Select [View Comments](#)  to view, edit, and add to the comments.

- Select [Show History](#)   to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.2.9.1.5 Resources (TNA and TMD)

The *Resources* screen provides you with the ability to add any resources needed to deliver or conduct the learning event. You can select resources on this screen that you anticipate needing and LEAD will add to this list of resources when you select them during development. When you first add a new *Initiative Location*, the data is copied from the *Training Data > Resources* screen for you to edit for the specific initiative location.

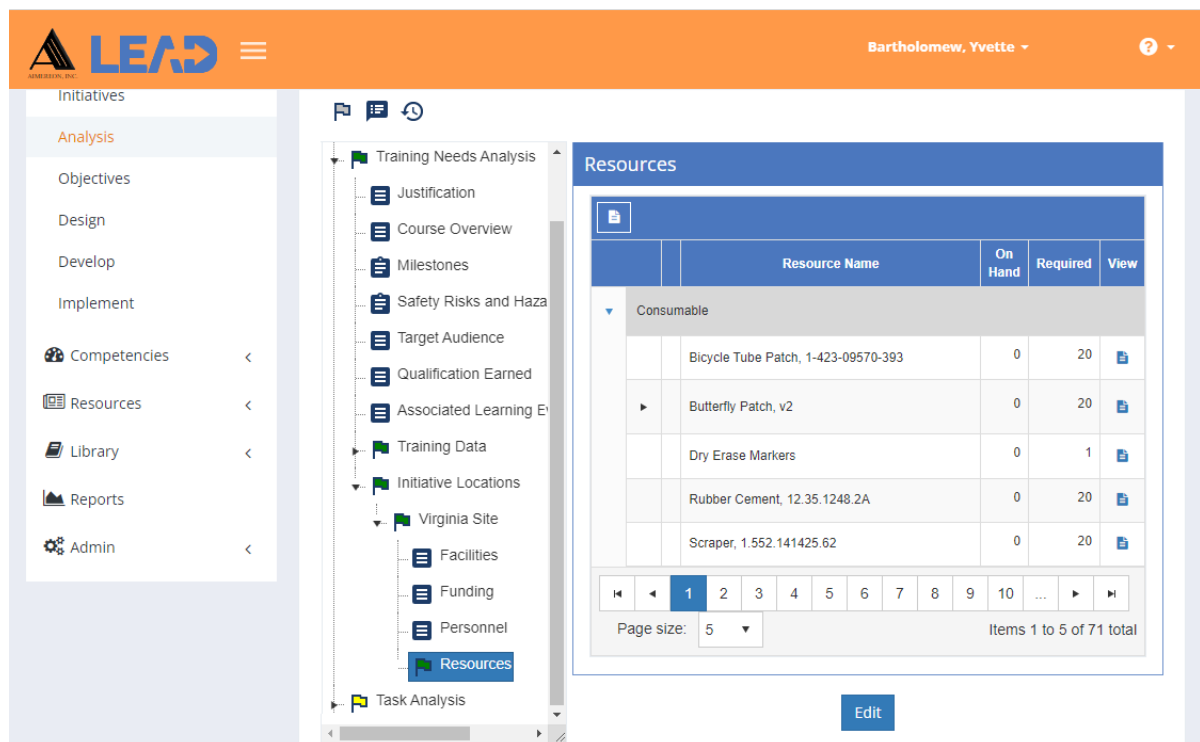










Figure 33: TNA/TMD > Initiative Location > Resources

On this screen you can:

- Select [Explain Flag](#)  to review the reasons the list of resources has been flagged.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)   to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- Select [Preview](#)  to generate the:
 - *Uncited Resources Report*. A spreadsheet that lists all resources in the *Resources* table that are **not** cited in the selected areas for the selected initiative location. On the

Output Options screen that pops-up, you can choose to check for resources **not** cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but listed in the *Resources* table.

- *Unlisted Resources Report*. A spreadsheet that lists all resources cited in the selected areas for the selected initiative location. and that are **not** in the *Resources* table. On the *Output Options* screen that pops-up, you can choose to check for resources cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but not listed in the *Resources* table.
- Select a resource and then:
 - *Preview*  to generate the:
 - *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
 - *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected IETM is cited or used.
 - *Uncited Resources Report*. A spreadsheet that lists all resources in the *Resources* table that are **not** cited in the selected areas for the selected initiative location. On the *Output Options* screen that pops-up, you can choose to check for resources **not** cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but listed in the *Resources* table.
 - *Unlisted Resources Report*. A spreadsheet that lists all resources cited in the selected areas for the selected initiative location. and that are **not** in the *Resources* table. On the *Output Options* screen that pops-up, you can choose to check for resources cited within storyboards, design considerations, test instructions, and skills, along with the default elements, sheets, practice and assessment test items (including the test item's references area), but not listed in the *Resources* table.
 - View the different versions of a resource by clicking on the arrow ► in the first column.
 - Select [Explain Flag](#)  to review the reasons the selected resource has been flagged.
 - View  a selected resource.
- *Edit* the resource list.

3.4.3 Curriculum Development

Under the *Curriculum Development* folder, you can build the table of contents structure for your initiative. The scope of the initiative determines what the individual elements of the structure are called:

Course / Distance Learning Course

- Module(s) - a grouping of one or more lessons
 - Lesson(s) - a grouping of one or more sections; each lesson is linked to a terminal objective
 - Overview - each lesson has one overview area for content
 - Section(s) - each lesson has one or more sections that contain the actual content of the course; each section is linked to an enabling objective
 - Summary - each lesson has one summary area for content

Module / Distance Learning Module

- Lesson(s) - a grouping of one or more sections; each lesson is linked to a terminal objective
 - Overview - each lesson has one overview area for content
 - Section(s) - each lesson has one or more sections that contain the actual content of the course; each section is linked to an enabling objective
 - Summary - each lesson has one summary area for content

Lesson / Distance Learning Lesson - linked to one terminal objective

- Overview - the lesson has one overview area for content
- Section(s) - the lesson has one or more sections that contain the actual content of the lesson; each section is linked to an enabling objective
- Summary - the lesson has one summary area for content

Manual

- Section(s) - a grouping of one or more chapters; each section is linked to a terminal objective
 - Overview - each section has one overview area for content
 - Chapter(s) - each section has one or more chapters that contain the actual content of the course; each chapter is linked to an enabling objective
 - Summary - each section has one summary area for content

Mentoring - linked to one terminal objective

- Overview - there is one overview area for content
- Subject(s) - there are one or more subjects that contain the actual content; each subject is linked to an enabling objective
- Summary - there is one summary area for content

On-the-Job-Training (OJT)

- Level(s) - a grouping of one or more procedures; each procedure is linked to a terminal objective
 - Overview - each level has one overview area for content
 - Procedure(s) - each level has one or more procedures that contain the actual content of the level; each procedure is linked to an enabling objective
 - Summary - each level has one summary area for content

Performance Support

- Module(s) - a grouping of one or more procedures; each procedure is linked to a terminal objective
 - Overview - each module has one overview area for content
 - Procedure(s) - each module has one or more procedures that contain the actual content of the level; each procedure is linked to an enabling objective
 - Summary - each module has one summary area for content

Workshop - linked to one terminal objective

- Overview - the workshop has one overview area for content
- Section(s) - the workshop has one or more sections that contain the actual content of the lesson; each section is linked to an enabling objective
- Summary - the workshop has one summary area for content

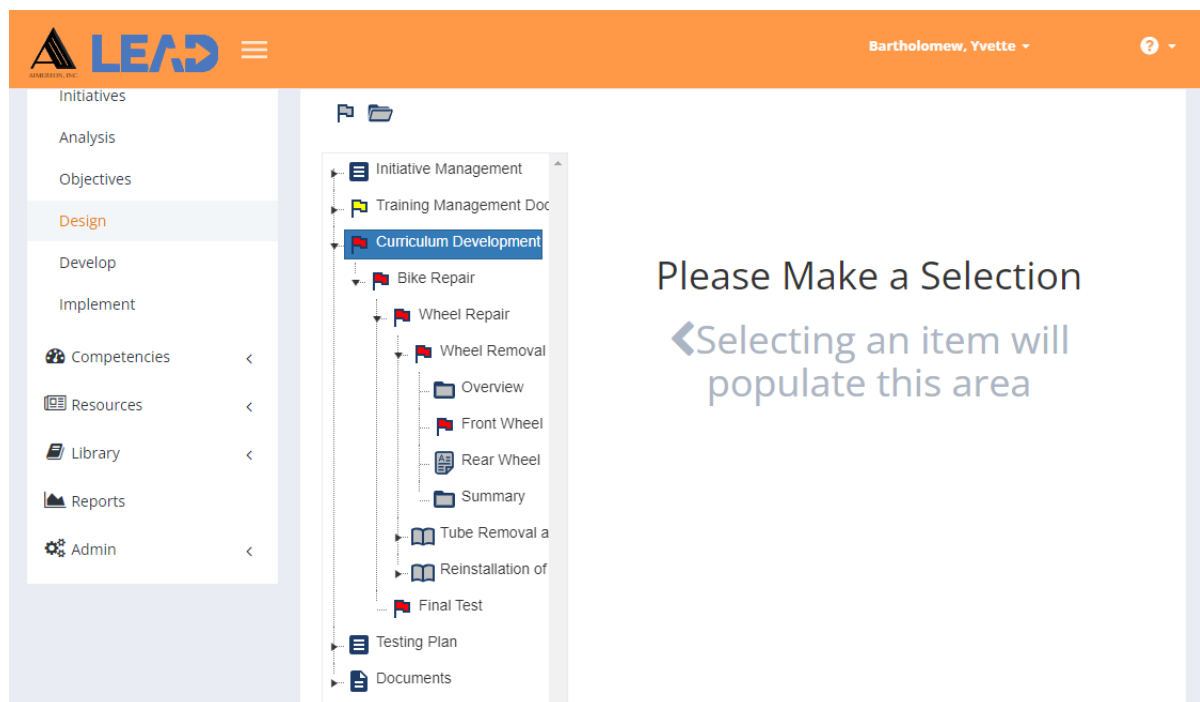










Figure 50: Design > Curriculum Development

On this screen you can:


- Select [Explain Flag](#)  to review the reasons the table of contents item has been flagged.
- *Expand*  all sub-folders at once down to the lowest level. Selecting any table of contents item and then *Expand* opens just that table of contents item down to the lowest level.

Select the top level to start working on the table of contents structure for your initiative.

In general, select a table of contents item by clicking on the relevant folder to:

- *View* the information about the table of contents item.
- *Edit* the information (including the title for modules and below, but not the *Status* - you can edit the *Status* on the *Develop* tab).
- [Resequence](#)  the items below the selected item in the tree structure.
- *Preview*  the table of contents outline (structure of your initiative with applicable objectives).
- *Delete*  an item at the module level or below (provided no content exists on the *Develop* tab). Once you've selected *OK* to the confirmation message, the *Training Outline Deletion* screen displays. Enter the title of the table of contents item to confirm the deletion.
Note: You can copy and paste the title from the screen into the field to make it easier on yourself. If you only enter a partial title, the item will not be deleted, and the *Training Outline Deletion* screen stays open, ready for you to try again.
- Select *Add Missing*  to create new table of contents items based on newly added learning objectives.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.3.1 Course Level

Only initiatives with a *Scope* of *Course* or *Distance Learning Course* have a course level. On this screen, you can use *Add Missing*  to automatically create the basic table of contents structure based on the objectives. A default *Module* is added automatically. You can then choose to add additional modules to group the lessons in your course.

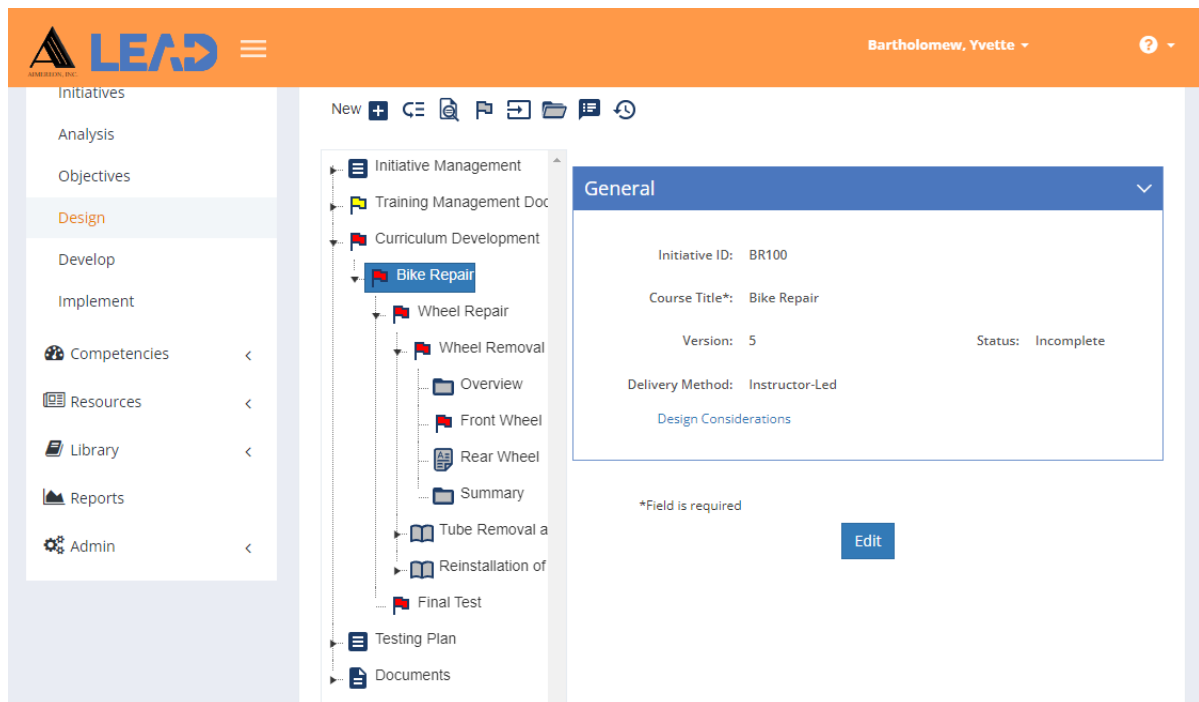










Figure 51: Curriculum Development > Course Level

Once you've built the basic structure, you have the following actions available to you:

- View the course level information.
- Edit the course level information.
- Add a **New**  Module or Assessment.
- [Resequence](#)  the table of contents items below the selected table of contents item in the tree structure.
- [Preview](#)  the *Table of Contents Outline* (structure of your initiative with applicable objectives).
- Select [Explain Flag](#)  to review the reasons the table of contents item has been flagged.
- Select [Add Missing](#)  to create new table of contents items based on newly added learning objectives.
- [Expand](#)  all sub-folders at once down to the lowest level.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

- *View/Edit* the *Design Considerations* that gather information about the table of contents item to help with the development of the learning event.

3.4.3.2 Module Level

Only initiatives with a *Scope* listed below have a module level, though the name will vary depending on the *Scope* (called *Module Level* in this manual):

- Course / Distance Learning Course: **Module**
- Module / Distance Learning Module - top level of the initiative: **Module**
- Manual - top level of the initiative: **Manual**
- On-the-Job Training (OJT) - top level of the initiative: **On-the-Job Training**
- Performance Support - top level of the initiative: **Performance Support**

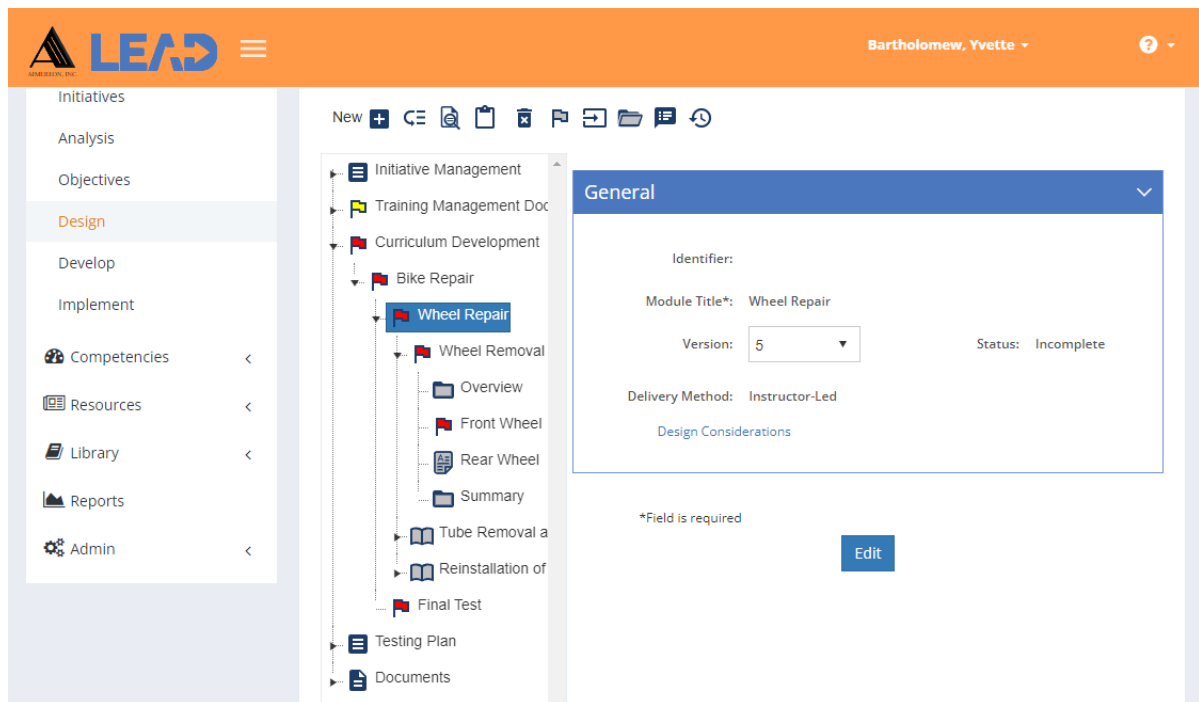
















Figure 52: Curriculum Development > Module Level

For initiatives where the *Module Level* is the top level of the initiative, any field differences are marked "- Top Level Only" or "- Lower Level Only" as needed. On this screen, you can use *Add Missing* to automatically create the basic table of contents structure based on the objectives. Once you've built the basic structure, you have the following actions available to you:

- *View* the module level information.

- *Edit* the module level information, except for the *Status*, that you can only edit on the *Develop* tab.
- Add a **New**  *Assessment*.
- *Resequence*   the items below the selected item in the tree structure.
- *Preview*  the *Table of Contents Outline* (structure of your initiative with applicable objectives).
- *Paste: Move*  a copied TO level (e.g., lesson) to the selected module level. When you move a TO level, the *Status* of the moved TO level does not change. You cannot move a TO level to another initiative.
Note: You cannot *Move* a copied TO level when the selected module level is *Locked*.
- *Delete*  an item at the module level or below (provided no content exists on the *Develop* tab). Once you've selected *OK* to the confirmation message, the *Training Outline Deletion* screen displays. Enter the title of the table of contents item to confirm the deletion.
Note: You can copy and paste the title from the screen into the field to make it easier on yourself. If you only enter a partial title, the item will not be deleted, and the *Training Outline Deletion* screen stays open, ready for you to try again.
- Select *Explain Flag*   to review the reasons the table of contents item has been flagged.
- *Add Missing*  to create new table of contents items based on newly added learning objectives (this is only available for the highest-level folder, for a *Module*, or *Distance Learning Module* initiative).
- *Expand*  all sub-folders at once down to the lowest level.
- Select *View Comments*   to view, edit, and add to the comments.
- Select *Show History*   to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *View/Edit* the *Design Considerations* at every level that gather information about the table of contents item to help with the development of the learning event.

3.4.3.3 Terminal Objective Level

All initiatives have at least one *Terminal Objective (TO) Level*, though the name will vary depending on the *Scope* of the initiative (later called *TO Level Name* for field titles):

- Course / Distance Learning Course: **Lesson**
- Module / Distance Learning Module: **Lesson**

- Lesson / Distance Learning Lesson - top level of the initiative: **Lesson**
- Manual: **Section**
- Mentoring - top level of the initiative: **Mentoring**
- On-the-Job Training (OJT): **Level**
- Performance Support: **Module**
- Workshop - top level of the initiative: **Workshop**

LEAD

Bartholomew, Yvette

Initiatives

Analysis

Objectives

Design

Develop

Implement

Competencies

Resources

Library

Reports

Admin

New

Initiative Management

Training Management Doc

Curriculum Development

Bike Repair

Wheel Repair

Wheel Removal

Overview

Front Wheel

Rear Wheel

Summary

Tube Removal a

Reinstallation of

Final Test

Testing Plan

Documents

General

Identifier:

Lesson Title*: Wheel Removal

Version: 5

Status: Incomplete

Delivery Method: Instructor-Led

Objective: With the bicycle removed from all lanes of traffic, remove the tire, wheel, and tube from the bicycle with no errors.

Design Considerations

Skill Basis

| Skill Type | Skill Item |
|------------|----------------------------------------------------------------------------------------|
| Task | Apply principles, techniques, procedures, and equipment to routine bicycle maintenance |












*Field is required

Edit

Figure 53: Curriculum Development > Terminal Objective Level

For initiatives where the *TO Level* is the top level of the initiative, any field differences are marked "- Top Level Only" or "- Lower Level Only" as needed. On this screen, you can use *Add Missing* to automatically create the basic table of contents structure based on the objectives. Once you've built the basic structure, you have the following actions available to you:

- View the TO level by clicking on the relevant folder.
- Edit the information, except for the *Status*, that you can only edit on the *Develop* tab.
- Add a **New + Assessment**.

- [Resequence](#)  the items below the selected item in the tree structure.
- [Preview](#)  the *Table of Contents Outline* (structure of your initiative with applicable objectives).
- [Copy](#)  the selected TO level (e.g., lesson) into memory. You will need to go to a module level before trying to select *Paste: Move* to move the TO level to a different module level in the same initiative.
Note: You cannot *Paste: Move* a TO level to another initiative.
- [Paste: Duplicate/Move](#)  a copied EO level (e.g., section) to the selected TO level (e.g., lesson).
Note: You cannot *Paste* a copied EO level when the selected TO level is *Locked*.
 - *Duplicate* will create a copy of the EO level. The *Status* of the copied EO level will be updated to *Incomplete* when it is pasted. You can use the *Duplicate* option to make copies of the EO level in other initiatives.
 - *Move* will move the EO level under the selected TO level. When you move an EO level, the *Status* of the moved EO level does not change. You cannot move an EO level to another initiative.
- [Delete](#)  an item at the TO level or below (provided no content exists on the *Develop* tab). Once you've selected *OK* to the confirmation message, the *Training Outline Deletion* screen displays. Enter the title of the table of contents item to confirm the deletion.
Note: You can copy and paste the title from the screen into the field to make it easier on yourself. If you only enter a partial title, the item will not be deleted, and the *Training Outline Deletion* screen stays open, ready for you to try again.
- Select [Explain Flag](#)  to review the reasons the table of contents item has been flagged.
- [Add Missing](#)  to create new table of contents items based on newly added learning objectives.
- [Expand](#)  all sub-folders at once down to the lowest level.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- View/Edit the [Objective](#)  information by selecting the *Objective:* link.

- *View/Edit* the *Design Considerations* at every level that gather information about the table of contents item to help with the development of the learning event.

3.4.3.4 Overview/Summary

Underneath the [Terminal Objective Level](#)¹¹³, you will see an *Overview* folder prior to the [Enabling Objective Level\(s\)](#)¹¹⁷ and a *Summary* folder at the end.

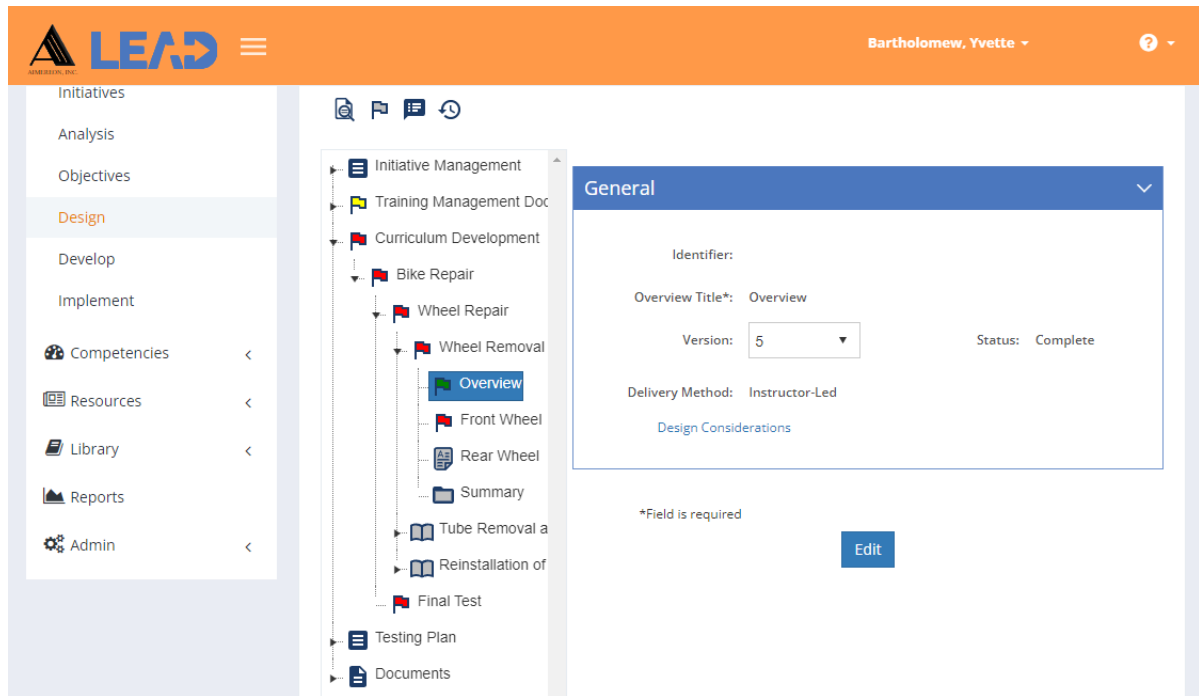






Figure 54: Curriculum Development > Overview or Summary

On this screen, you can:

- *View* the table of contents item by clicking on the relevant folder.
- *Edit* the information, except for the *Status*, that you can only edit on the *Develop* tab.
- *Preview*  the *Table of Contents Outline* (structure of your initiative with applicable objectives).
- Select [Explain Flag](#)²²⁰  to review the reasons the *Overview* or *Summary* has been flagged.
- Select [View Comments](#)²¹⁸  to view, edit, and add to the comments.
- Select [Show History](#)²¹⁰  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

- *View/Edit* the *Design Considerations* at every level that gather information about the table of contents item to help with the development of the learning event.

3.4.3.5 Enabling Objective Level

All initiatives have one or more *Enabling Objective (EO) Levels*, though the name will vary depending on the *Scope* of the initiative (later called *EO Level Name* for field titles):

- Course / Distance Learning Course: **Section**
- Module / Distance Learning Module: **Section**
- Lesson / Distance Learning Lesson: **Section**
- Manual: **Chapter**
- Mentoring: **Subject**
- On-the-Job Training (OJT): **Procedure**
- Performance Support: **Procedure**
- Workshop: **Section**



The screenshot shows the LEAD Curriculum Development interface. On the left is a sidebar with navigation options: Initiatives, Analysis, Objectives, Design (highlighted), Develop, Implement, Competencies, Resources, Library, Reports, and Admin. The main area displays a tree view of curriculum items. Under 'Bike Repair', there is a 'Wheel Repair' folder containing 'Front Wheel' (selected), 'Rear Wheel', and 'Summary'. Other items include 'Tube Removal a', 'Reinstallation of', 'Final Test', 'Testing Plan', and 'Documents'. The right panel shows the 'General' tab for the 'Front Wheel' section. It includes fields for Identifier, Section Title* (Front Wheel), Version (5), Status (Incomplete), Class (20 minutes), Lab (60 minutes), Content Type* (Procedure), Cognitive Level* (Remember), and Delivery Method (IMI). An objective is provided: 'With the bicycle removed from all lanes of traffic, remove the front wheel of the bicycle with no errors.' Below this is the 'Skill Basis' section with a table:

| Skill Type | Skill Item | |
|------------|--------------------|--|
| Subtask | Remove front wheel | |


At the bottom of the right panel, there is a note '*Field is required' and an 'Edit' button.

Figure 55: Curriculum Development > Enabling Objective Level

On this screen, you have the following actions available to you:






- View the EO level by clicking on the relevant folder.
- Edit the information, except for the *Status*, that you can only edit on the *Develop* tab.
- Preview  the *Table of Contents Outline* (structure of your initiative with applicable objectives).
- Copy  the selected EO level (e.g., section) into memory. You will need to go to a TO level (e.g., lesson) before trying to select *Paste*.

Note: If you make changes to the selected EO level on the *Develop* tab, after selecting *Copy*, then return to the *Design* tab to *Paste: Move/Duplicate* the Enabling level somewhere else, you will not get a copy of the original EO level before you made the changes, rather the changes you made will be copied, too.

- Delete  an item at the EO level (provided no content exists on the *Develop* tab). Once you've selected *OK* to the confirmation message, the *Training Outline Deletion* screen displays. Enter the title of the table of contents item to confirm the deletion.

Note: You can copy and paste the title from the screen into the field to make it easier on

yourself. If you only enter a partial title, the item will not be deleted, and the *Training Outline Deletion* screen stays open, ready for you to try again.

- Select [Explain Flag](#)  ²²⁰ to review the reasons the table of contents item has been flagged.
- Select [View Comments](#)  ²¹⁸ to view, edit, and add to the comments.
- Select [Show History](#)  ²¹⁰ to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- View/Edit the [Objective](#)  ⁷⁵ information by selecting the link.
- View/Edit the *Design Considerations* at every level that gather information about the table of contents item to help with the development of the learning event.
- View  the *Skill Basis* that the EO level is based on.

3.4.3.6 Assessment

Assessments can be added under the *Curriculum Development* folder to be at the same level as a *Module Level* (if you have that level in your initiative), or on the same level as a terminal or enabling objective. You can select which enabling objectives will be tested in the assessment in the *Objectives* tab, where you will see all objectives at the same level or below the selected level in the tree structure.

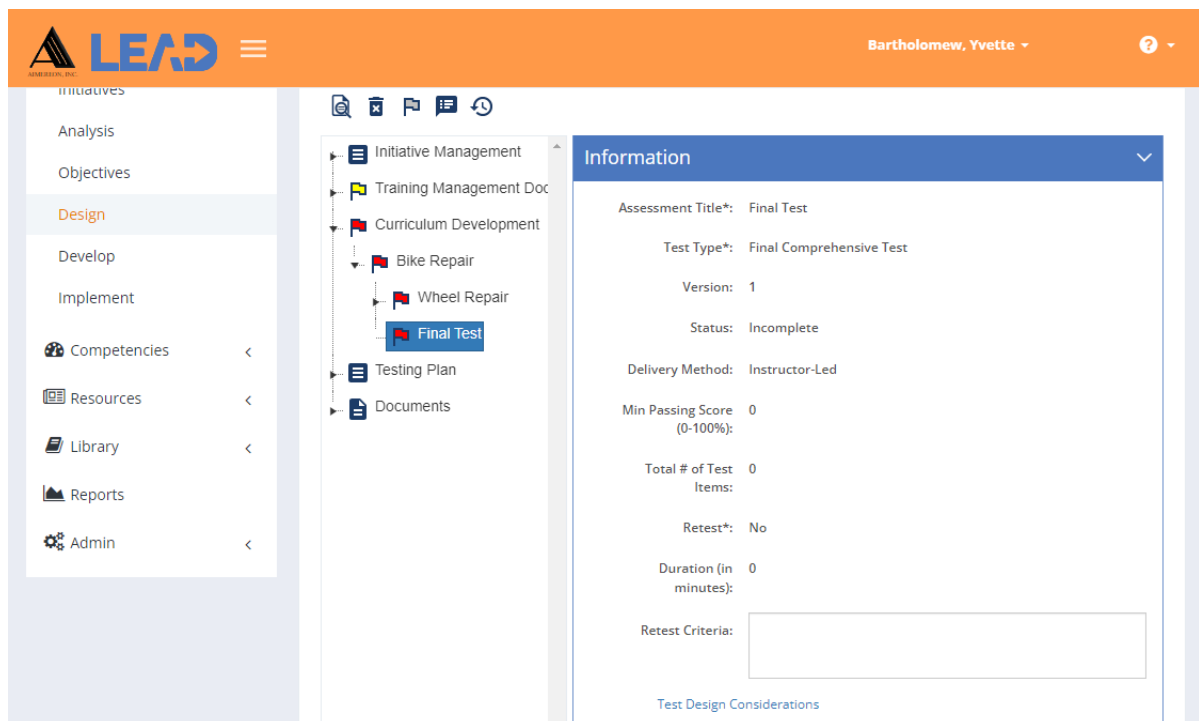







Figure 56: Curriculum Development > Assessment

On this screen, you can:

- *View* the assessment information by clicking on the assessment.
- *Edit* the information, except for the *Status*, that you can only edit on the *Develop* tab.
- *Preview*  the *Table of Contents Outline* (structure of your initiative with applicable objectives).
- *Delete*  the assessment (provided no content exists on the *Develop* tab). Once you've selected *OK* to the confirmation message, the *Training Outline Deletion* screen displays. Enter the title of the table of contents item to confirm the deletion.
Note: You can copy and paste the title from the screen into the field to make it easier on yourself. If you only enter a partial title, the item will not be deleted, and the *Training Outline Deletion* screen stays open, ready for you to try again.
- Select *Explain Flag*  to review the reasons the assessment has been flagged.
- Select *View Comments*  to view, edit, and add to the comments.
- Select *Show History*  to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *View/Edit* the *Test Design Considerations*.

3.4.4 Testing Plan

On the *Testing Plan* screen, you can gather information about the overall assessment plan for the initiative (if any). This includes the following information:

- *Minimum Passing Grade* - captures information about the minimum passing grade required to pass the initiative.
- *Justification / Comments* - captures any information needed to justify the minimum passing grade, along with any other comments about the testing plan.
- *Test Procedure* - captures the overarching testing procedure for the initiative; you can capture test instructions for each assessment separately in the *Develop* tab.
- *Matrix* - lists all the assignments that were created under the *Curriculum Development* folder and allows you to assign a weight to them that can be used to determine the overall/final grade a participant receives.

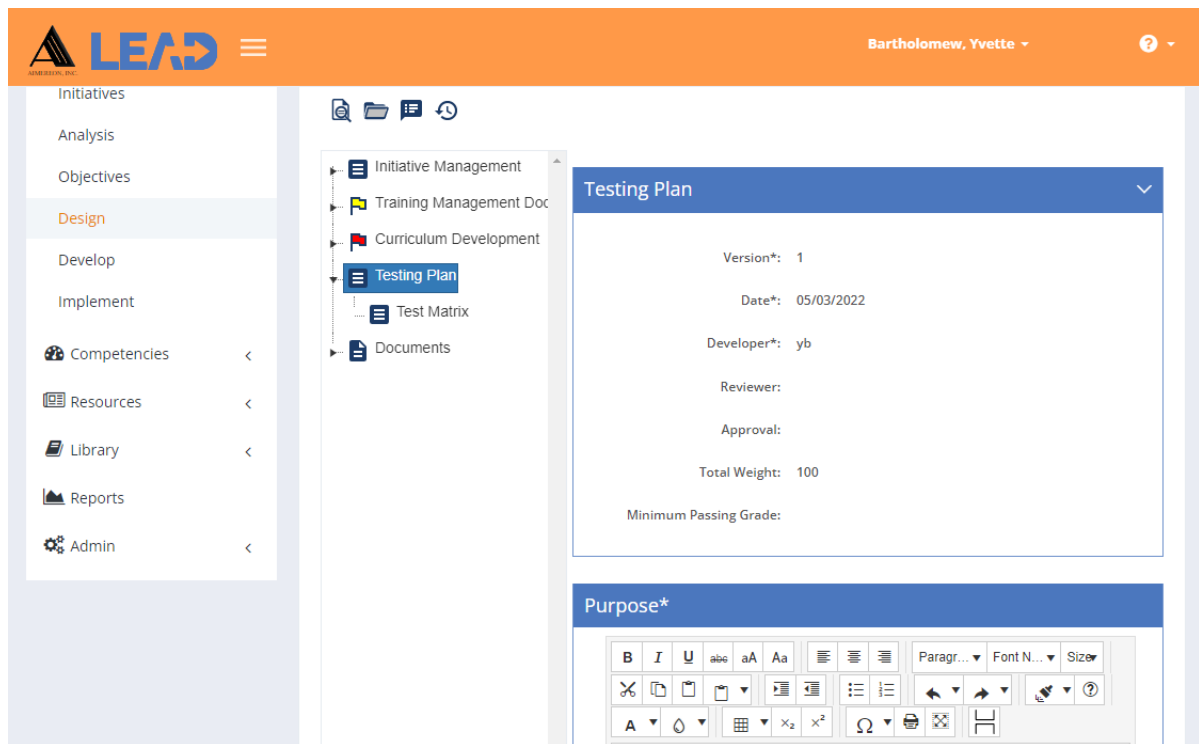






Figure 57: Design > Testing Plan

On these screens you have the following actions available to you:

- *View* the information.
- *Edit* the information.
- *Preview*  the testing plan.
- *Expand*  all sub-folders at once down to the lowest level.
- Select [View Comments](#)  ²¹⁸ to view, edit, and add to the comments.
- Select [Show History](#)  ²¹⁰ to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.4.1 Test Matrix

On the *Test Matrix* screen, you can assign a weight to each assessment that was created under the *Curriculum Development* folder. This weight can be used to determine the overall/final grade a participant receives.

LEAD

Bartholomew, Yvette

Initiatives

Analysis

Objectives

Design

Develop

Implement

Competencies

Resources

Library

Reports

Admin

Initiative Management

Training Management Doc

Curriculum Development

Testing Plan

Test Matrix

Documents

Test Matrix

Edit the weights of the listed Assessment Objects to total 100%

| Title | Test Type | Minutes | % Weight | Retest? | Retest Criteria |
|-------------------------------|--------------------------|---------|----------|-----------|-----------------|
| Performance Test - Fix a Flat | Performance Test | 30 | 20 | No | |
| Fixing a Flat Bicycle Tire | Performance Test | 60 | 30 | No Answer | |
| Final Test | Final Comprehensive Test | 120 | 50 | No | |
| Total weight : | | | 100% | | |

*Field is required

Edit

Figure 58: Testing Plan > Test Matrix

On this screen you can:

- View the information.
- Edit weight assigned to each assessment.
- Select [View Comments](#) ²¹⁸ to view, edit, and add to the comments.
- Select [Show History](#) ²¹⁰ to review the changes made to the information, including the user name and date/time of saved changes, and revert to an earlier saved revision.

3.4.5 Documents

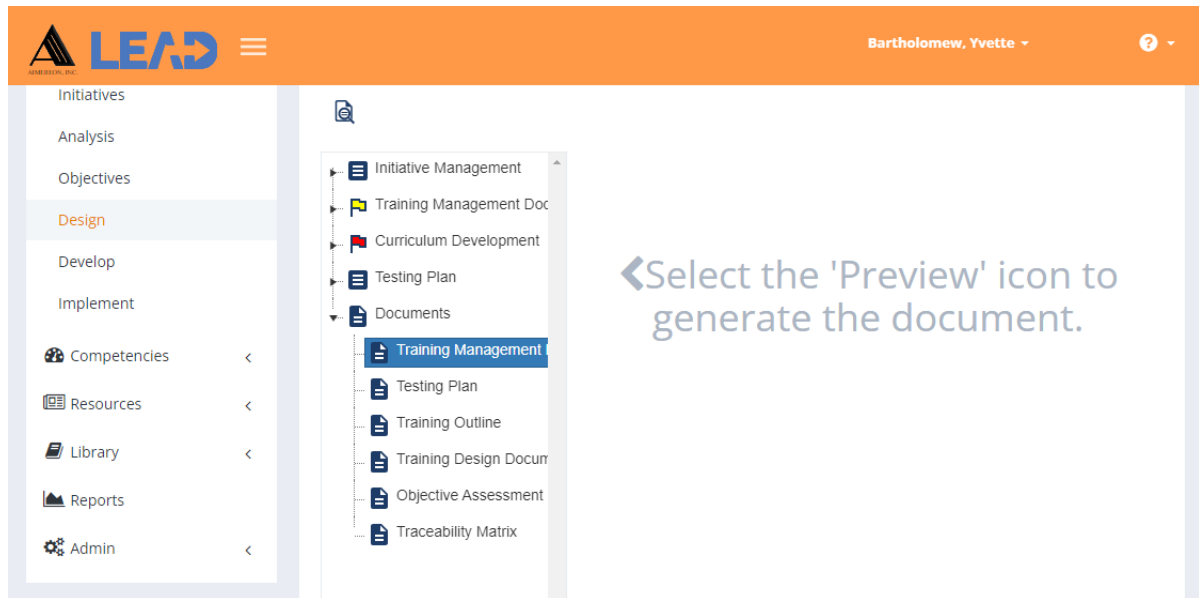



Figure 59: Design > Documents

Expand  the Documents folder to see the available options:

- *Training Management Document* - a PDF document of the information listed under the *Training Management Document*, plus the table of contents under the *Curriculum Development* folder, along with the objectives. You can choose whether to include any comments on the *Output Options* screen.
- *Testing Plan* - a PDF document of the information listed under the *Testing Plan* folder. You can choose whether to include any comments on the *Output Options* screen.
- *Training Outline* - a PDF document listing the table of contents under the *Curriculum Development* folder, along with their status and their objectives. You can choose whether to include any comments on the *Output Options* screen.
- *Training Design Document* - a PDF document of the table of contents under the *Curriculum Development* folder, along with the objectives, the design considerations, assessment information, and the test design considerations. You can choose whether to include any comments on the *Output Options* screen.
- *Objective Assessment Information* - a spreadsheet that contains the objectives along with their assessment information, as detailed on the *Objectives* tab.
- *Traceability Matrix* - a spreadsheet listing the table of contents under the *Curriculum Development* folder on the *Design* tab, the objectives for each applicable table of contents item, the skills of the task analysis that support the objectives, along with the competencies that the skills are based on.

Select the document you wish to create in the tree structure. Then select *Preview*  to generate the document.

3.5 Develop

On the *Develop* tab, you add the actual content to your initiative. Based on the *Curriculum Development* tree structure you created on the *Design* tab, you can now add the following content:

- [Front Matter](#)¹²⁸ information for the output generated for the instructor/facilitator and the participants with predefined [Elements](#)¹³⁵ (or headings) to which you can add [paragraphs, notes, cautions, or warnings](#)¹³⁶.
- [Terminal Objective Level](#)¹²⁹ entries (e.g., Lessons) have *Overview* and *Summary* folders before and after the *Enabling Objective Level* entries (e.g., Sections).
- *Overview* and *Summary* folders to which you can add [Elements](#)¹³⁵ (or main headings), under which you can add [paragraphs, notes, cautions, or warnings](#)¹³⁶.
- [Enabling Objective Level](#)¹³² entries (e.g., Sections) contain the actual learning content, including:
 - [Sheets](#)¹³⁸ that will print in the *Participant Guide* (or similar output).
 - [Elements](#)¹³⁵ (or main headings) for the content structure, based on the content type, under which you can add [paragraphs, notes, cautions, or warnings](#)¹³⁶.
 - *Practice* [test items](#)¹⁴¹, which will print in the output for the instructor/facilitator.
 - *Assessment* [test items](#)¹⁴¹, which will output in an assessment.
- [Assessment](#)¹⁴⁹ entries that allow you to edit the test instructions for a given assessment.

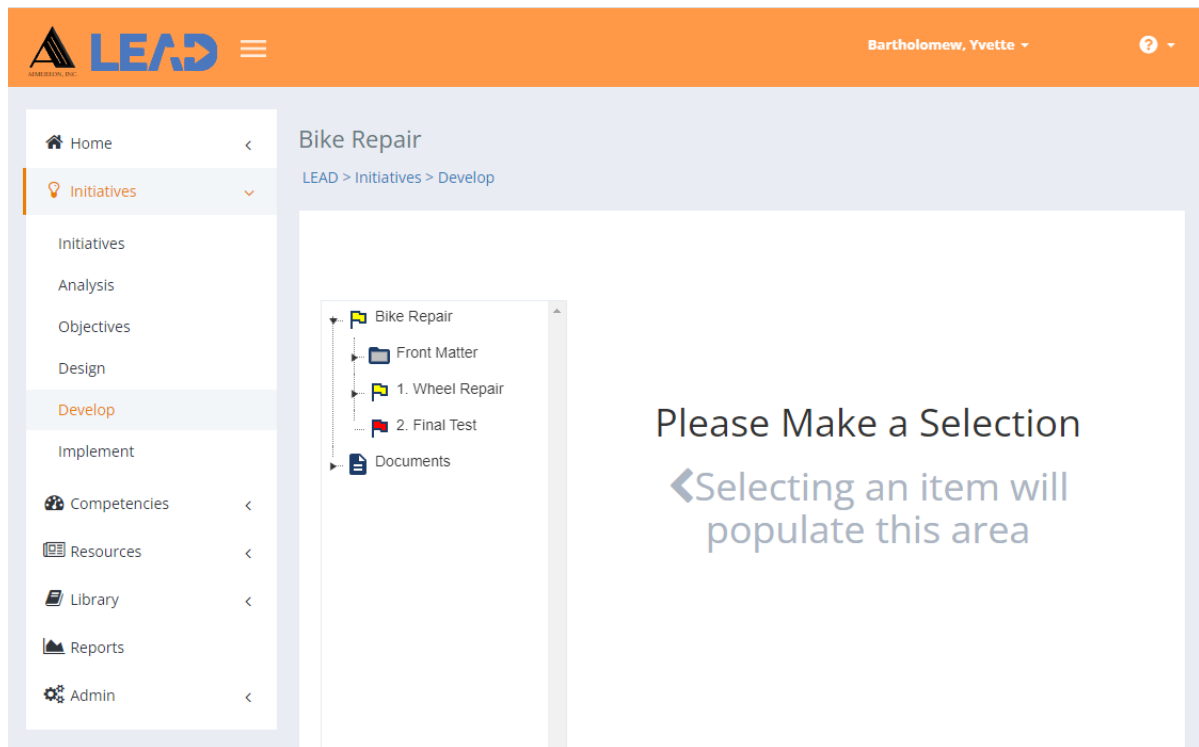





Figure 60: Initiatives > Develop

On this screen:

- Select a folder and then *Expand*  to open up the folders beneath the selected folder to get to the data you need to work with:
 - Selecting a Course or Module Level and then *Expand* opens the tree down to the enabling objective level, including the Overview and Summary folders.
 - Selecting a Terminal or Enabling Objective Level and then *Expand* opens the tree down to the lowest level, including Sheets, Elements, and Sub-Elements.
 - Selecting an Overview or Summary folder and then *Expand* opens the tree down to the lowest level, including Elements and Sub-Elements.
 - Selecting the *Documents* folder and then *Expand* opens up all the available output options.
- To make more room to see items in the tree structure, click and drag the bottom right corner of the tree window (or frame).
- To make even more room, click on the three-bar icon  next to LEAD in the header bar to minimize the main menu to show only the icons. To see all of the menu items again, click on the three-bar icon again.

3.5.1 Front Matter

On the folders and screens below the *Front Matter* folder, you can edit the front matter text that is output in the Instructor Guide (IG) and the Participant Guide (PG). *Expand*  the *Front Matter* folder and select either IG to edit the front matter for the Instructor Guide or PG to edit the front matter for the Participant Guide. LEAD comes with three default elements (headings) for the front matter:

- IG
 - How to Use the Instructor Guide
 - Safety Hazard Awareness
 - Security Awareness
- PG
 - How to Use the Participant Guide
 - Safety Hazard Awareness
 - Security Awareness

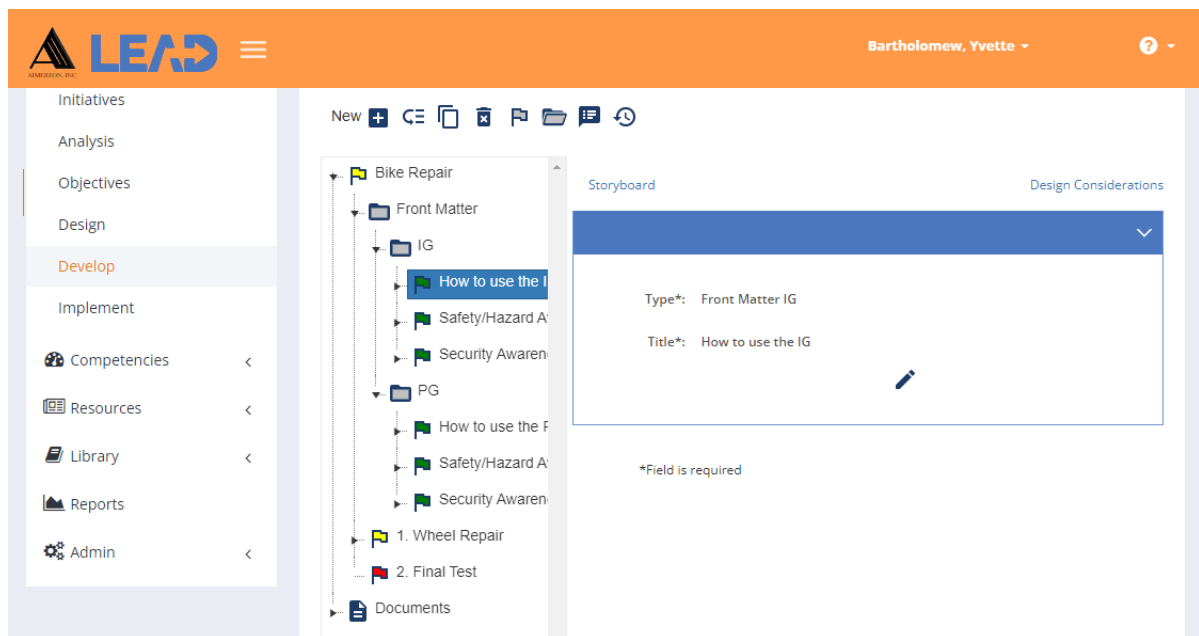


Figure 61: Front Matter

3.5.2 Course Level

Only initiatives with a *Scope of Course* or *Distance Learning Course* have a course level.

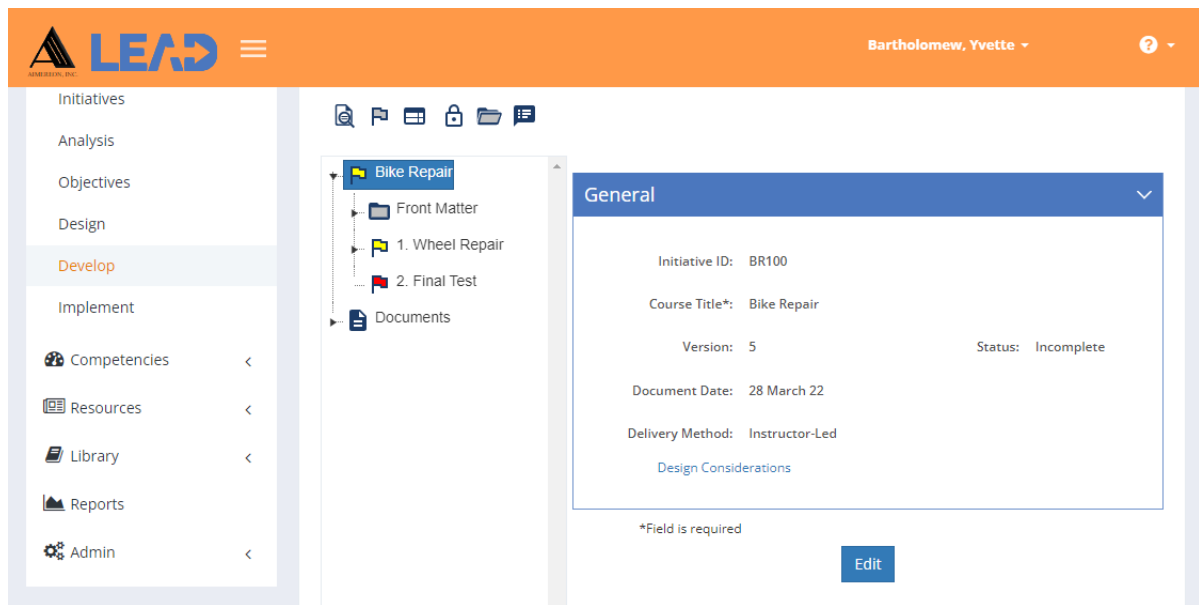










Figure 62: Course Level

On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- *Edit* the information (including the title for modules and below).
- *Preview*  the Instructor Guide, Participant Guide, *Storyboard*, or test items.
Note: If you leave an area (or tab/heading) on a Sheet empty by not adding any entries, then that area will not output in the PG.
- Select [Explain Flag](#)  to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)  at every level that lists all resources used or cited anywhere below the selected table of contents item on the *Develop* tab.
- View the [Cited Sheets](#)  at every level that lists all sheets listed anywhere below the selected table of contents item on the *Develop* tab.
- *Lock*  the table of contents item to prevent edits from taking place.
- *Unlock*  a locked table of contents item to allow edits to take place again.
- *Expand*  up to three levels of sub-folders at a time. Selecting the course level and then *Expand* opens the tree down to the EO level, including the *Overview* and *Summary* folders.
- Select [View Comments](#)  to view, edit, and add to the comments.

- View the *Design Considerations* at every level that gather information about the table of contents item to help with the development of the learning event.

3.5.3 Module Level

Only initiatives with a *Scope* listed below have a module level, though the name will vary depending on the *Scope* (called *Module Level* in this manual):

- Course / Distance Learning Course: **Module**
- Module / Distance Learning Module - top level of the initiative: **Module**
- Manual - top level of the initiative: **Manual**
- On-the-Job Training (OJT) - top level of the initiative: **On-the-Job Training**
- Performance Support - top level of the initiative: **Performance Support**

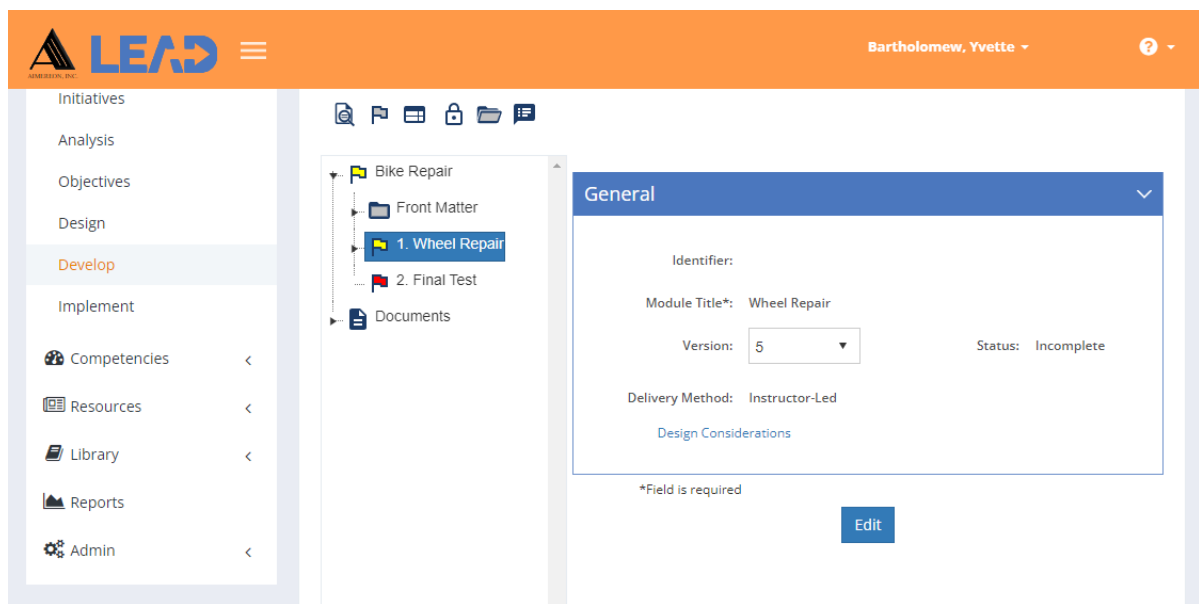










Figure 63: Develop > Module Level

On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- Edit the information (including the title for modules and below).
- Preview  the Instructor Guide, Participant Guide, *Storyboard*, or test items for this table of contents item.

Note: If you leave an area (or tab/heading) on a Sheet empty by not adding any entries, then that area will not output in the PG.

- Select [Explain Flag](#)  to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)  at every level that lists all resources used or cited anywhere below the selected table of contents item on the *Develop* tab.
- View the [Cited Sheets](#)  at every level that lists all sheets listed anywhere below the selected table of contents item on the *Develop* tab.
- Lock  the table of contents item to prevent edits from taking place.
- Unlock  a locked table of contents item to allow edits to take place again.
- Expand  up to three levels of sub-folders at a time. Selecting the module level and then *Expand* opens the tree down to the EO level, including the *Overview* and *Summary* folders.
- Select [View Comments](#)  to view, edit, and add to the comments.
- View the *Design Considerations* at every level that gather information about the table of contents item to help with the development of the learning event.

3.5.4 Terminal Objective Level

All initiatives have at least one *Terminal Objective (TO) Level*, though the name will vary depending on the *Scope* of the initiative (later called *TO Level Name* for field titles):







- Course / Distance Learning Course: **Lesson**
- Module / Distance Learning Module: **Lesson**
- Lesson / Distance Learning Lesson - top level of the initiative: **Lesson**
- Manual: **Section**
- Mentoring - top level of the initiative: **Mentoring**
- On-the-Job Training (OJT): **Level**
- Performance Support: **Module**
- Workshop - top level of the initiative: **Workshop**






The screenshot shows the LEAD system interface. On the left is a navigation menu with options: Initiatives, Analysis, Objectives, Design, Develop (highlighted), Implement, Competencies, Resources, Library, Reports, and Admin. The main area displays a tree view of 'Bike Repair' with sub-items: Front Matter, 1. Wheel Repair (selected), 2. Tube Removal and Repair, 3. Reinstallation of Wheel, and 2. Final Test. Below this is a 'Documents' section. On the right, the 'General' tab is active, showing fields for Identifier, Lesson Title* (Wheel Removal), Version (5), Status (Incomplete), Delivery Method (Instructor-Led), and Objective (With the bicycle removed from all lanes of traffic, remove the tire, wheel, and tube from the bicycle with no errors.). Below the General tab is the 'Skill Basis' section, which contains a table with columns 'Skill Type' and 'Skill Item'. The table has one row: 'Task' with the skill item 'Apply principles, techniques, procedures, and equipment to routine bicycle maintenance'. At the bottom right is an 'Edit' button.

| Skill Type | Skill Item |
|------------|----------------------------------------------------------------------------------------|
| Task | Apply principles, techniques, procedures, and equipment to routine bicycle maintenance |



Figure 64: Terminal Objective Level

On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- Edit the information (including the title).
- Preview  Instructor Guide, Participant Guide, *Storyboard*, or test items for this TO level.
Note: If you leave an area (or tab/heading) on a Sheet empty by not adding any entries, then that area will not output in the PG.
- Select [Explain Flag](#)  to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)  at every level that lists all resources used or cited anywhere below the selected table of contents item on the *Develop* tab.
- View the [Cited Sheets](#)  at every level that lists all sheets listed anywhere below the selected table of contents item on the *Develop* tab.
- Lock  the table of contents item to prevent edits from taking place.
- Unlock  a locked table of contents item to allow edits to take place again.

- *Expand*  the folders down to the lowest level, including Sheets, Elements, and Sub-Elements.
- Select [View Comments](#)  to view, edit, and add to the comments.
- View/Edit the [Objective](#)  information by selecting the *Objective:* link.
- View the *Design Considerations* at every level that gather information about the table of contents item to help with the development of the learning event.
- View  the *Skill Basis*  that the terminal objective level is based on.

3.5.5 Overview/Summary

Underneath the [Terminal Objective Level](#)  you will see an *Overview* folder prior to the [Enabling Objective Level\(s\)](#)  and a *Summary* folder at the end. On the screens below the *Overview* and *Summary* folders, you can edit the overview and summary text for the terminal objective level. There is one predefined element for each folder, *Introduction* for the *Overview* folder, and *Review* for the *Summary* folder.

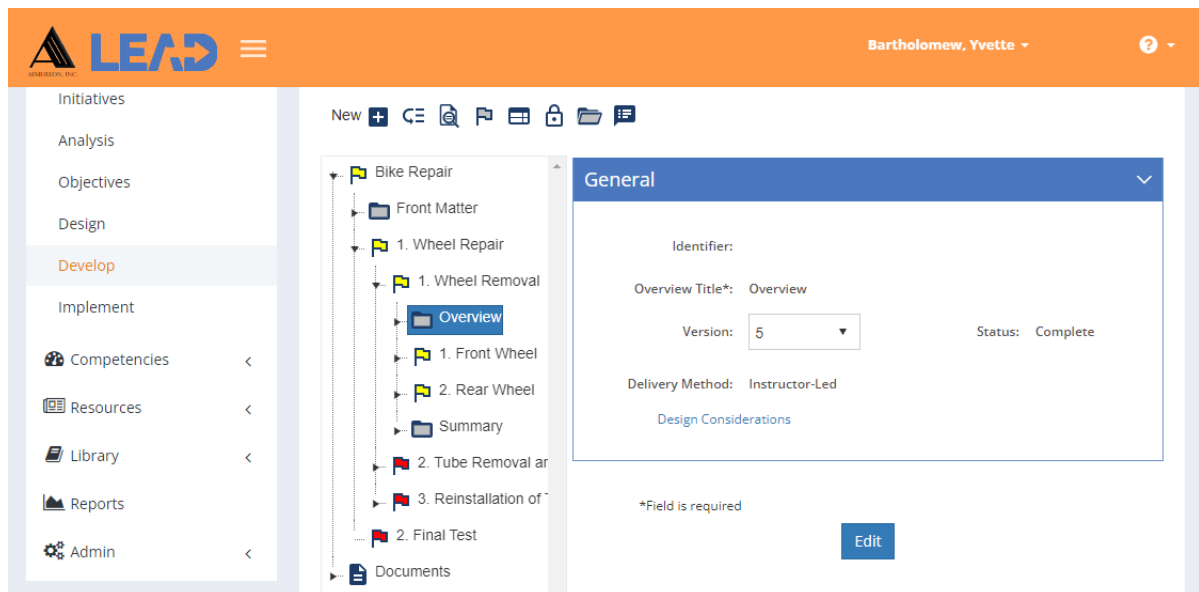














Figure 65: Overview or Summary

On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- Edit the information (including the title).
- Add a [New](#)  [element](#)  (heading).
- [Resequence](#)  the items below the selected item in the tree structure.

- *Preview*  the *Instructor Guide* output for the *Overview* or *Summary*.
- *Paste*  a copied element at the end of the existing elements. If you cannot paste an element directly, you can try to [Paste/Append](#)  the contents of the element by selecting an element first. Though you cannot paste the contents an element that contains a sheet citation to an *Overview*, or *Summary* element.
- Select [Explain Flag](#)  to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)  at every level that lists all resources used or cited anywhere below the selected table of contents item on the *Develop* tab.
- *Lock*  the table of contents item to prevent edits from taking place.
- *Unlock*  a locked table of contents item to allow edits to take place again.
- *Expand*  the folders down to the lowest level, including all elements and sub-elements.
- Select [View Comments](#)  to view, edit, and add to the comments.
- View the *Design Considerations* at every level that gather information about the table of contents item to help with the development of the learning event.

3.5.6 Enabling Objective Level

All initiatives have one or more *Enabling Objective (EO) Levels*, though the name will vary depending on the *Scope* of the initiative (later called *EO Level Name* for field titles):

- Course / Distance Learning Course: **Section**
- Module / Distance Learning Module: **Section**
- Lesson / Distance Learning Lesson: **Section**
- Manual: **Chapter**
- Mentoring: **Subject**
- On-the-Job Training (OJT): **Procedure**
- Performance Support: **Procedure**
- Workshop: **Section**

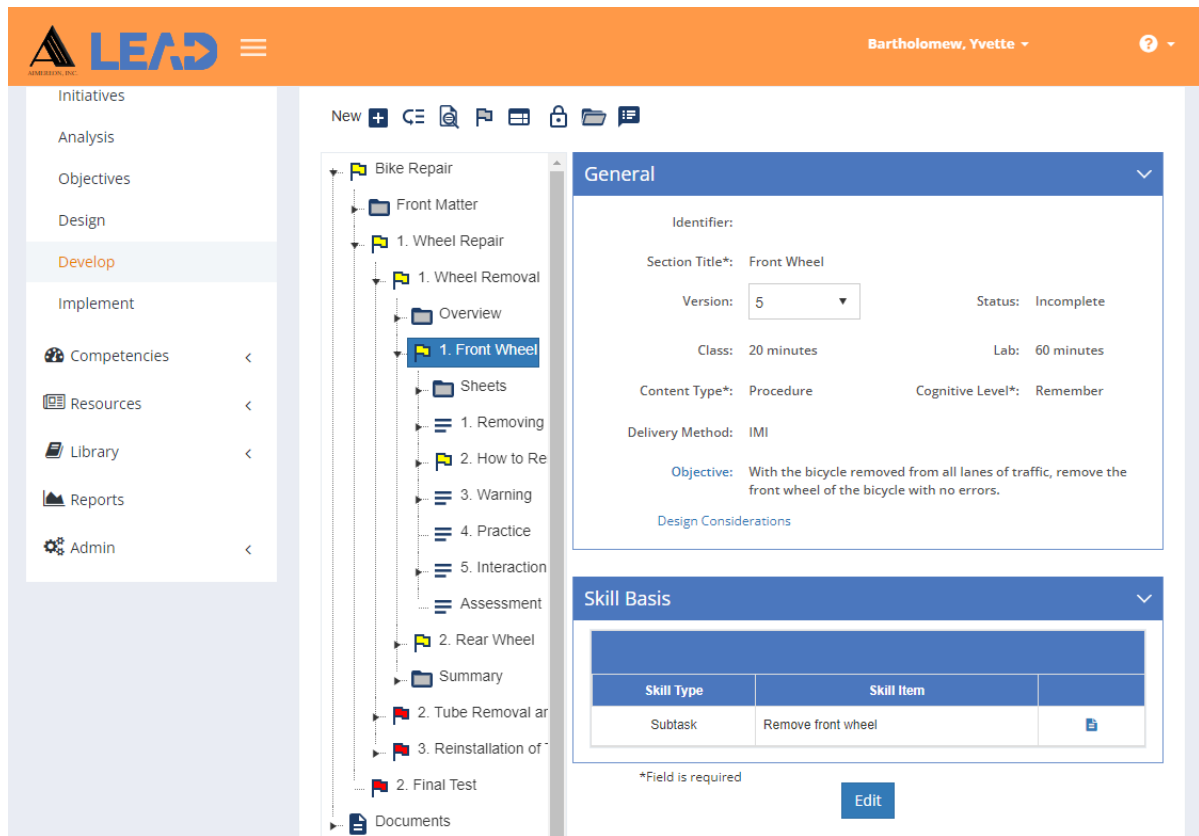



















Figure 66: Enabling Objective Level



On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- Edit the information (including the title).
- Create a New Version  of an approved EO level, which will automatically also version the linked enabling objective and any unversioned parents (TO level and module level).
- Add **New**  **elements**  that will contain the content in [Pages or Paragraphs](#)  and provide notes, cautions, or warnings, as well as [test items](#)  for the *Practice* or *Assessment* elements.
- [Resequence](#)  the elements below the selected item in the tree structure.
- [Preview](#)  the Instructor Guide, Participant Guide, *Storyboard*, or test items for this EO level.
Note: If you leave an area (or tab/heading) on a Sheet empty by not adding any entries, then that area will not output in the PG.
- [Paste](#)  a copied element. If you cannot paste an element directly, you can try to [Paste/Append](#)  the contents of the element, by selecting an element and then

Paste/Append. You can also copy all test items from a *Practice* or *Assessment* element at a time, by copying the element and then selecting *Paste/Append* on another *Practice* or *Assessment* element. The *Performance Job Sheet* test item cannot be pasted into a *Practice* element, as that type of test item can only be copied/pasted to another *Assessment* element.

- Select [Explain Flag](#)  to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)  at every level that lists all resources used or cited anywhere below the selected table of contents item on the *Develop* tab.
- View the [Cited Sheets](#)  at every level that lists all sheets listed anywhere below the selected table of contents item on the *Develop* tab.
- Lock  the table of contents item to prevent edits from taking place.
- Unlock  a locked table of contents item to allow edits to take place again.
- Expand  the folders down to the lowest level, including sheets, elements, and sub-elements.
- Select [View Comments](#)  to view, edit, and add to the comments.
- View the *Objective* information.
- View the *Design Considerations* at every level that provide information about the table of contents item to help with the development of the learning event.
- View  the *Skill Basis* that the EO level is based on.

Underneath the *EO Level* in the tree structure, you will see:

- a [Sheets](#)  folder that lists any *Participant Guide* sheets (or handouts) that are linked to this EO.
- the required elements (headings) as determined by the *Content Type* set for this EO level on the *Objective* or *Design* tabs.
 - underneath each element you can create *Pages* and *Paragraphs* (subheadings) for the content, including *Text* and links to *Resources* and *Sheets*; *Pages* and *Paragraphs* can also be converted to notes, cautions, or warnings.
 - *Pages* are created for the *IMI*, *Blended*, and *EPSS Delivery Methods* of the EO level.
 - *Paragraphs* are created for the *Instructor-Led Delivery Method* of the EO level.
- a *Practice* element (if required) for non-graded [test items](#)  that will be included in the Instructor Guide.

- an *Assessment* element (if required) for graded [test items](#)¹⁴¹ that will be included in any assessment that tests the EO (and not included in the Instructor Guide).

For each element (including *Practice* and *Assessment* elements) and pages, paragraphs, notes, cautions, or warnings, you can review the *Design Considerations* and *View/Edit* the [Storyboard](#)¹⁴³ for that particular element, page, paragraph, notes, cautions, or warnings.

3.5.7 Elements

Elements are the major headings for your content. There are predefined elements for the [Front Matter](#)¹²⁶ of the instructor and participant guides. You can create elements for the [Overview and Summary](#)¹³¹ folders underneath the [Terminal Objective Level](#)¹²⁹ and underneath the [Enabling Objective Level](#)¹³².

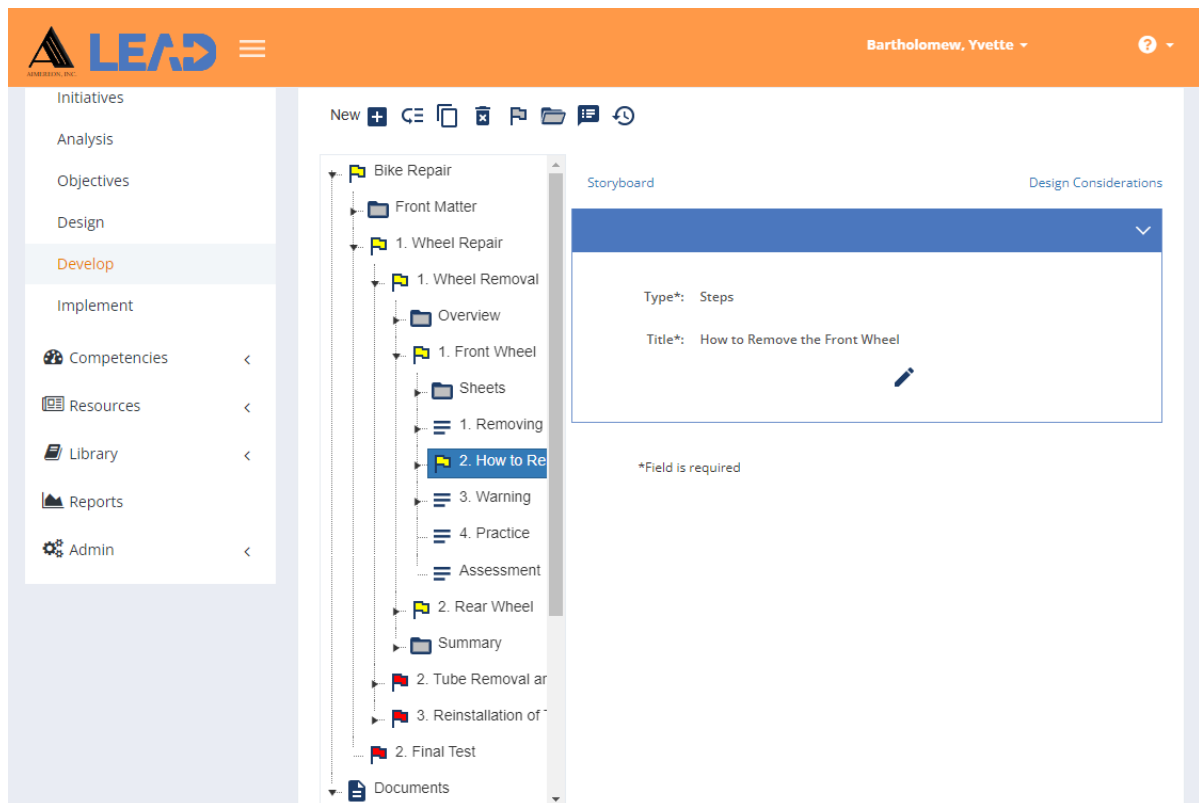











Figure 67: Elements

Once you have selected an element, you can:

- *View/Edit* the element title and type.
- Add a **New** [page or paragraph](#)¹³⁶ (and convert either one to a note, caution, or warning), or [test item](#)¹⁴¹ for the *Practice* or *Assessment* elements.

- [Resequence](#)  the pages, paragraphs, notes, cautions, or warnings underneath the element.
- [Copy](#)  the element.
- [Paste/Append](#)  the contents (pages, paragraphs, notes, cautions, or warnings) of a copied element at the end of any existing content. If you cannot paste an element directly, you can try to [Paste/Append](#) the contents of the element, though you cannot paste the contents an element that contains a sheet citation to a *Front Matter*, *Overview*, or *Summary* element. You can also copy all test items from a *Practice* or *Assessment* element at a time, by copying the element and then selecting [Paste/Append](#) on another *Practice* or *Assessment* element. The *Performance Job Sheet* test item cannot be pasted into a *Practice* element, as that type of test item can only be copied/pasted to another *Assessment* element.
- [Delete](#)  a selected element. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
Note: You cannot delete a required element under the *Enabling Objective Level*.
- Select [Explain Flag](#)  to review the reasons the element has been flagged.
- [Expand](#)  the tree to the lowest level.
- Select [View Comments](#)  to view, edit, and add to the comments.
- Select [Show History](#)  to review the changes made to the element.
- [View/Edit](#) the [Storyboard](#)  for the element.
- View the *Design Considerations* for *Front Matter elements*, for *Overview or Summary elements*, or for elements at the *Enabling Objective Level*.

3.5.7.1 Sub-Elements

Underneath the *Elements* (major headings), you can create as many *Pages* or *Paragraphs* (subheadings) as you need for your content. *Pages* are primarily meant for on screen display (like eLearning), while *Paragraphs* are for printed materials (like the *Instructor Guide*).

What you can do with a page or paragraph is identical, just how the information is output and used is different.

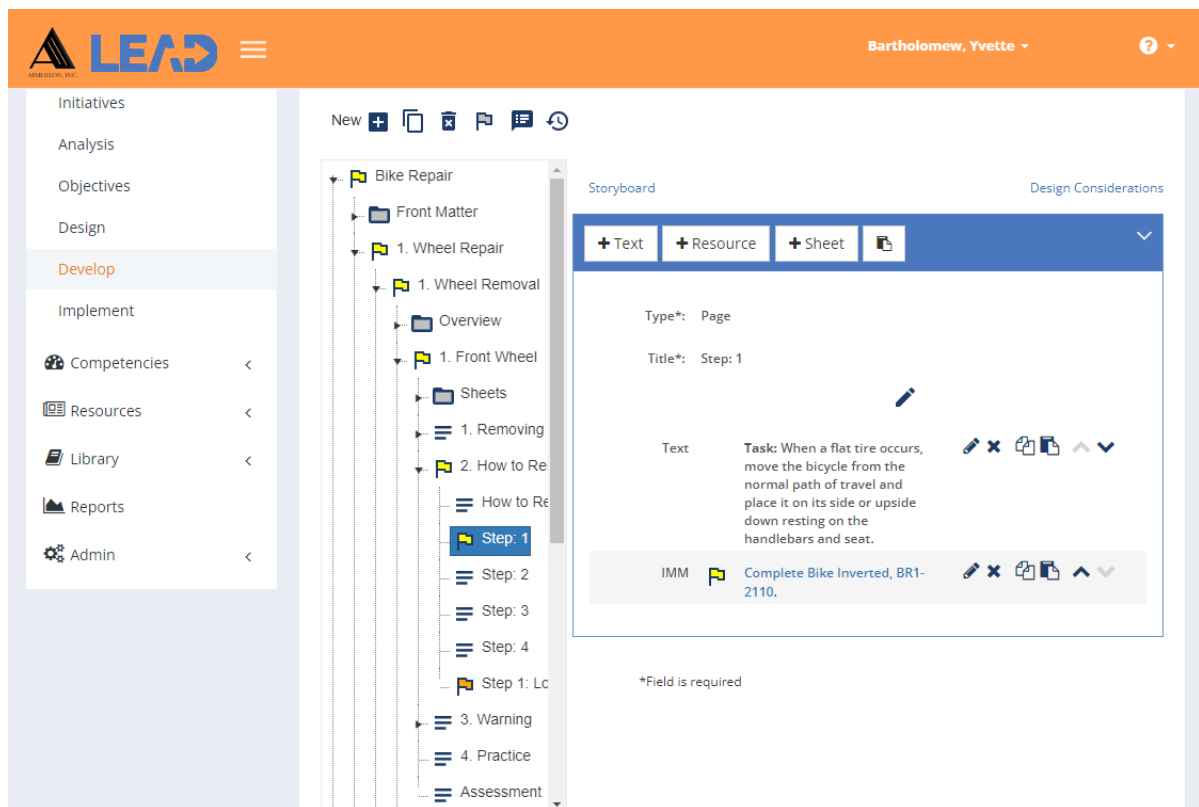





















Figure 68: Sub-Elements: Pages/Paragraphs and Notes/Cautions/Warnings

Once you have selected a page or paragraph, you can:

- **View/Edit**  the title, type, and contents by selecting the page or paragraph.
- **Copy** /**Paste**  a selected page or paragraph.
- **Delete**  a selected page or paragraph (including all the content it contains). Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- Select **Explain Flag**  ²²⁰ to review the reasons the selected page or paragraph has been flagged.
- Select **View Comments**  ²¹⁸ to view, edit, and add to the comments.
- Select **Show History**  ²¹⁰ to review the changes made to the page or paragraph.
- View/Edit the **Storyboard**  ¹⁴³ for the page or paragraph.
- View the *Design Considerations* for *Front Matter* sub-elements, for *Overview* or *Summary* sub-elements, or for sub-elements at the *Enabling Objective* level.
- Add a **+Text** **Text**  ¹⁴⁴ entry.

- Convert a *Text* entry to a *Note*, *Caution*, or *Warning* entry, which will output the text with top and bottom lines and a *Note*, *Caution*, or *Warning* icon.
- Add a  **Resource** [Resource](#)¹⁴⁶ entry.
- View or download a *Resource* entry, if a link is shown and you have the correct software available.
- Add a  **Sheet** [Sheet](#)¹⁴⁶ entry (for Enabling Objective Level page or paragraph only).
- Select [Explain Flag](#)²²⁰  to review the reasons the selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Sheet* entry has been flagged.
- **Edit**  a selected [Text, Note, Caution, Warning](#)¹⁴⁴, [Resource](#)¹⁴⁶, or [Sheet](#)¹⁴⁶ entry.
- **Delete**  a selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Sheet* entry. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- **Copy** /**Paste**  a selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Sheet* entry.
- Move a selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Sheet* entry **Up**  or **Down**  in the list of entries to resequence the list of entries.



3.5.8 Sheets

Sheets are the handouts to the participants that are collated into the *Participant Guide (PG)*. You create sheets by selecting the *Sheets* folder underneath the [EO Level](#)¹³² and then **New** . A sheet can be cited in a [Page or Paragraph](#)¹³⁶ underneath an element of the same *EO Level* that contains the sheet to provide the instructor or participant information about how and when to refer to or use the sheet.

LEAD supports the following sheet types, with the following tabs (headings) and types of content (in parentheses):

- **Assignment Sheet** - lists materials to be studied, e.g. for homework:
 - *Introduction* ([Text](#)¹⁴⁴) - introduces the assignment.
 - *Study Assignment* ([Resources](#)¹⁴⁶) - lists the resources to be studied with additional information provided using *Before* and *After* text.
 - *Study Questions* ([Text](#)¹⁴⁴, [Resources](#)¹⁴¹, and [Test Items](#)¹⁴¹) - lists questions that help the participant apply the information.
- **Diagram Sheet** - displays diagrams, schematics, or charts:
 - *Diagram* ([Resources](#)¹⁴¹) - displays the diagram in more detail than available elsewhere and allows for participant notes.
- **Information Sheet** - expands on the information not available in other resources, specific to the topic being discussed:

- *Introduction* ([Text](#)¹⁴⁴) - introduces the information and why it is useful to the participant.
- *References* ([Resources](#)¹⁴⁶) - lists the sources used to develop the sheet.
- *Information* ([Text](#)¹⁴⁴ and [Resources](#)¹⁴¹) - provides detailed information about the topic.
- *Job Sheet* - provides step by step information on a job (typically a procedure or process) to be completed by the participant:
 - *Introduction* ([Text](#)¹⁴⁴) - introduces the job.
 - *Resources* ([Resources](#)¹⁴⁶) - lists the resources to use to perform the job.
 - *Safety Precautions* ([Text](#)¹⁴⁴ and [Resources](#)¹⁴¹) - describes any safety precautions to take prior, during, and after the job that are not detailed elsewhere in the PG.
 - *Job Steps* ([Text](#)¹⁴⁴ and [Resources](#)¹⁴¹) - lists the steps to take to perform the job, along with space for notes.
 - *Self-Test Questions* ([Text](#)¹⁴⁴, [Resources](#)¹⁴¹, and [Test Items](#)¹⁴¹) - lists questions for the participant to answer that require reflection and analysis on the job.
- *Outline Sheet* - provides the major points to be covered in the topic:
 - *Introduction* ([Text](#)¹⁴⁴) - introduces the overall scope and content of the topic.
 - *Outline* ([Text](#)¹⁴⁴ and [Resources](#)¹⁴¹) - outlines the content and major resources that will be used, also, sometimes used to allow for note taking by the Participants.
- *Problem Sheet* - provides problem(s) for the participants to practice with:
 - *Introduction* ([Text](#)¹⁴⁴) - introduces the problem(s) to be solved.
 - *Resources* ([Resources](#)¹⁴⁶) - lists the available resources.
 - *Directions* ([Text](#)¹⁴⁴ and [Resources](#)¹⁴¹) - details the directions and procedures to use to solve the problem(s).
 - *Problem* ([Text](#)¹⁴⁴, [Resources](#)¹⁴¹, and [Test Items](#)¹⁴¹) - details the problem(s) to be solved.

You can generate the PG, and thus all the relevant sheets, when you select the *EO Level* (e.g., sections), *TO Level* (e.g., lessons), *Module Level*, or the *Course Level* and select *Preview* . You can also generate an individual sheet, by selecting it under the *Sheets* folder and selecting *Preview* .

Note: If there are no entries for a tab (heading), i.e., it is empty, then that tab will not output on the sheet or in the PG.

To copy and paste a sheet from one *EO Level* to another *EO Level*, you need to copy the entry under the *Page* or *Paragraph* that cites or references the sheet and paste the entry under a *Page* or *Paragraph* to copy both the citation/reference entry and the sheet at the same time.

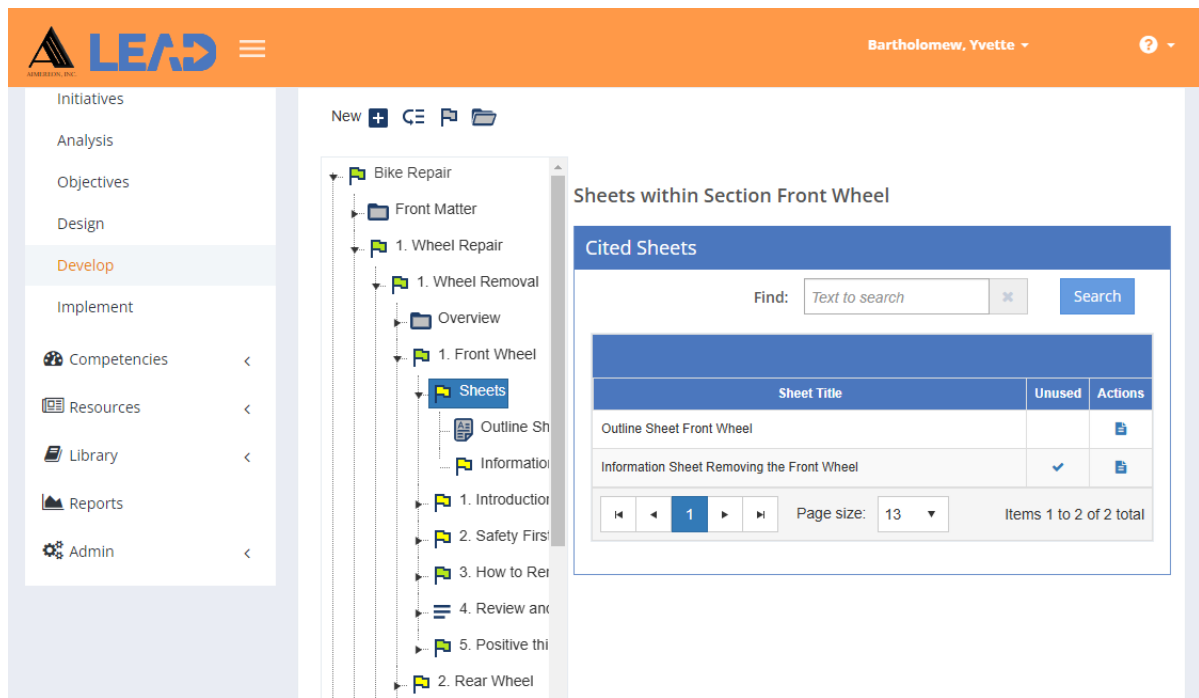


Figure 69: Enabling Objective Level > Sheets

On the *Sheets* screen, you can:

- See a list of the sheets that have been created for the *EO Level*.
- Add **New** *Sheet*.
- [Resequence](#) ²⁰⁹ the sheets to change the order in which they are output in the Participant Guide.
- Select [Explain Flag](#) ²²⁰ to review the reasons the *Sheets* folder has been flagged.
- *Expand* the *Sheets* folder to show the existing sheets.
- *View* a selected sheet.

3.5.8.1 Adding Multiple Resources to a Sheet

You can add *Resource* citations on tabs that [list](#) resources a little differently than you can on the other Sheet tabs, as you can select multiple resources of multiple *Resource Types* to add at the same time. You then [edit](#) ¹⁴⁶ those multiple resource citations one at a time. The information in this section describes what you can do on the following sheet tabs:

- *Assignment Sheet* - *Study Assignment* tab.
- *Information Sheet* - *References* tab.
- *Job Sheet* - *Resources* tab.

- *Problem Sheet - Resources* tab.
- *Performance Job Sheet Test Item - Resources, Setup Instructions, and Reference* tabs.

3.5.8.2 Editing a Resource Citation/Entry

When you edit *Resource* citation on the tabs listed below:

- *Assignment Sheet - Study Questions* tab.
- *Diagram Sheet - Diagram* tab.
- *Information Sheet - Information* tab.
- *Job Sheet - Safety Precautions, Job Steps, and Self-Test Questions* tabs.
- *Outline Sheet - Outline* tab.
- *Problem Sheet - Directions and Problem* tab.
- *Performance Job Sheet Test Item - Safety Precautions and Job Steps* tabs.



For information on how to work with *Resource* citations on the other tabs, please see [here](#)¹⁴⁶.

You have additional options when you select an IMM graphic with an associated JPG, JPEG, or PNG file, as you can also:


- [View](#)¹⁴¹ the graphic.
- Set the following for each graphic:
 - [Width](#)¹⁴¹
 - [Rotation](#)¹⁴¹
 - [Alignment](#)¹⁴¹

3.5.9 Test Items

You can create test items on the *Practice* and *Assessment* elements underneath the enabling objective levels, as well as for *Assignment*, *Job*, and *Problem Sheets*. When it comes to the output of test items:

- Test items created under a *Practice* element will output in the *Instructor Guide* and similar outputs at the module, terminal objective, and enabling objective levels. You can also *Preview*  test items for a selected *Practice* element, as well as for a selected course, module, terminal objective, and enabling objective level.
- Test items created under an *Assessment* element will output in [Assessment\(s\)](#)¹⁴⁹ and [Assessment Package](#)¹⁵⁴ outputs. You can also *Preview*  test items for a selected

Assessment element, as well as for a selected course, module, terminal objective, and enabling objective level.

- Test items created on *Sheets* will output in the *Participant Guide* and answers to those test items will output in the back of the *Instructor Guide*. You can *Preview*  the test items in the *Participant Guide* output at the course, module, terminal objective, and enabling objective level, as well as for a selected sheet.

LEAD supports the following test item types:

- Essay Question - free response test item.
- Fill-in-the-Blank - short answer test item.
- Multiple Choice - including single answer and multiple answer.
- Performance Job Sheet - complete with a rubric to help assess participants for assessment elements only.
- True/False - single response test item.
- Two-Column Matching - mix and match test item.

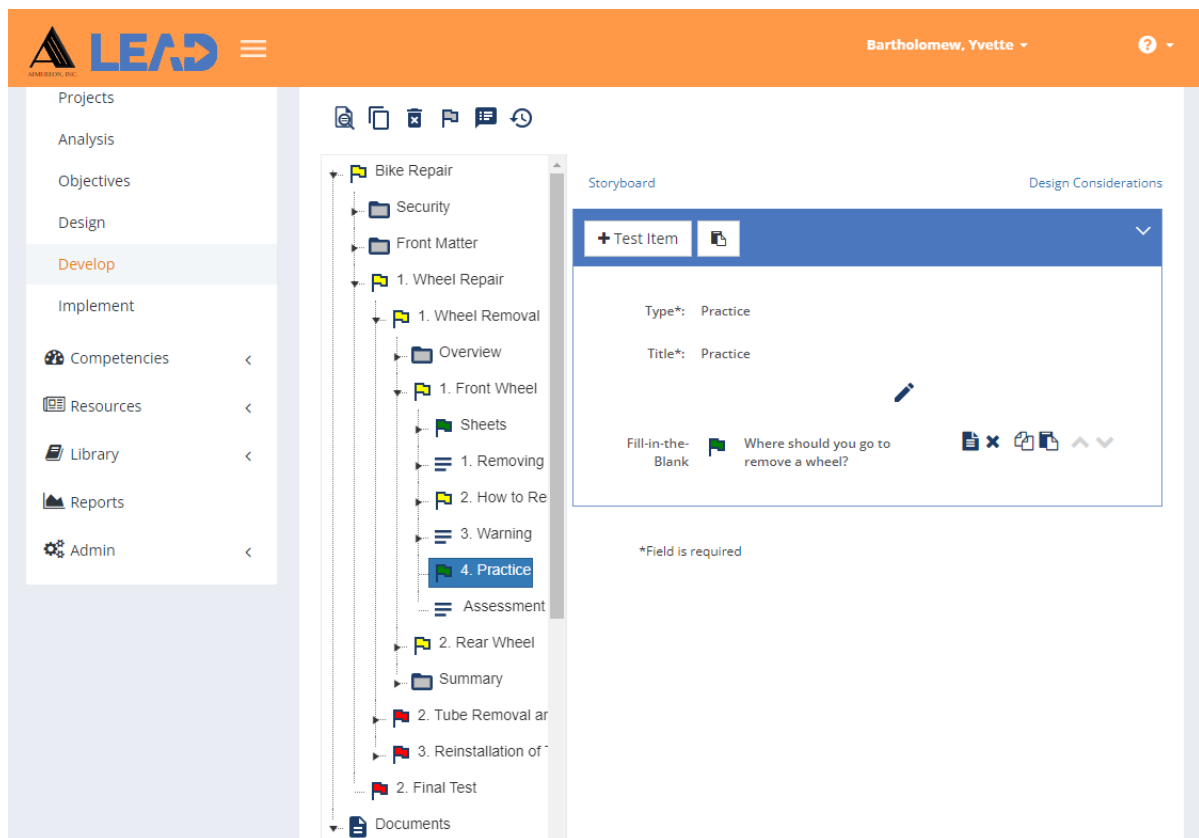

















Figure 70: Test Items - Practice Element Example




Once you have selected the practice or assessment element, or are viewing the sheet, you can:









- Select [View Comments](#)  or  to view, edit, and add to the comments.
- *View/Edit*  the practice or assessment title, and the sheet information.
- Add a New  **Test Item**.
- *Paste*  a copied test item at the top of the list of test items.
- Select [Explain Flag](#)  to review the reasons the test item has been flagged.
- *View*  a selected test item and then edit the test item.
- *Delete*  a selected test item.
- Move a selected test item *Up*  or *Down*  in the list of test items to resequence the list of test items.
- *Copy* /*Paste*  a test item.
- Select [Show History](#)  to review the changes made to the practice or assessment element, or the sheet.
- *Delete*  a selected practice or assessment element, or sheet.
Note: Depending on your configuration of LEAD, you may not be able to delete the only practice or assessment element under the *Enabling Objective Level*.
- *View/Edit* the [Storyboard](#)  for the test item, practice, or assessment element.
- View the *Design Considerations* for the *Enabling Objective Level*.

3.5.10 Storyboard



You can enter storyboard information, which allows you to detail how the content should be implemented, especially for self-paced content that will be developed outside of this software, at the *Element* and *Page/Paragraph* levels in LEAD. This includes the *Front Matter* elements, as well as the *Overview* and *Summary* elements, along with all elements and test items at the enabling objective level. On any screen that displays a *Storyboard* link, click that link to display the *Storyboard* screen.

Once you've opened the *Storyboard* screen, you can:

- Select [View Comments](#)  to view, edit, and add to the comments for each tab.
- Add a [Text](#)  **Text** entry to a selected tab (heading) and convert it to a *Note*, *Caution*, *Warning* entry.
- Add a [Resource](#)  **Resource** entry to a selected tab (heading).

- **Paste**  a copied *Text*, *Note*, *Caution*, *Warning*, or *Resource* entry to the start of the list of entries.
- Select [Explain Flag](#)  to review the reasons an item on the storyboard has been flagged.
- View or download a *Resource* entry, if a link is shown and you have the correct software available.
- **Edit**  a selected *Text*, *Note*, *Caution*, *Warning*, or *Resource* entry.
- **Delete**  a selected *Text*, *Note*, *Caution*, *Warning*, or *Resource* entry. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.
- **Copy** /**Paste**  a selected *Text*, *Note*, *Caution*, *Warning*, or *Resource* entry.
- Move a selected *Text*, *Note*, *Caution*, *Warning*, or *Resource* entry **Up**  or **Down**  in the list of entries to resequence the list of entries.

Select *Close* to close the *Storyboard* screen.

You can *Preview*  the *Storyboard* from the [Documents](#)  folder, as well as any table of contents item, except for *Overview* and *Summary*.

3.5.11 Adding or Editing a Text/Note/Caution/Warning Entry

You can view, add, or edit *Text* / *Note* / *Caution* / *Warning* entries in several places:

- *Design Considerations*
- Sub-Element>: *Page* / *Paragraph* / *Caution* / *Note* / *Warning*
- *Sheets*
- Certain *Test Items*
- *Storyboard*
- *Test Instructions*
- *Test Design Considerations*

3.5.12 Adding a Resource Citation/Entry

You can add *Resource* citations as described below in several places:

- [Sub-Elements](#)  : *Page* / *Paragraph* / *Caution* / *Note* / *Warning*

- [Test Items](#)¹⁴¹, except for the *Performance Job Sheet Test Item - Resources, Setup Instructions, and Reference* tabs.
- *Sheets*, for adding resource citations/entries on the other tabs, please see [here](#)¹⁴⁰.
 - *Diagram Sheet - Diagram* tab.
 - *Information Sheet - Information* tab.
 - *Job Sheet - Safety Precautions and Job Steps* tabs.
 - *Outline Sheet - Outline* tab.
 - *Problem Sheet - Directions* tab.
- [Storyboard](#)¹⁴³.
- *Test Instructions*.

3.5.12.1 Working with IETM Table of Contents

Once you have selected the IETM on the *Resource Selection* screen, the *IETM Selection* screen opens.

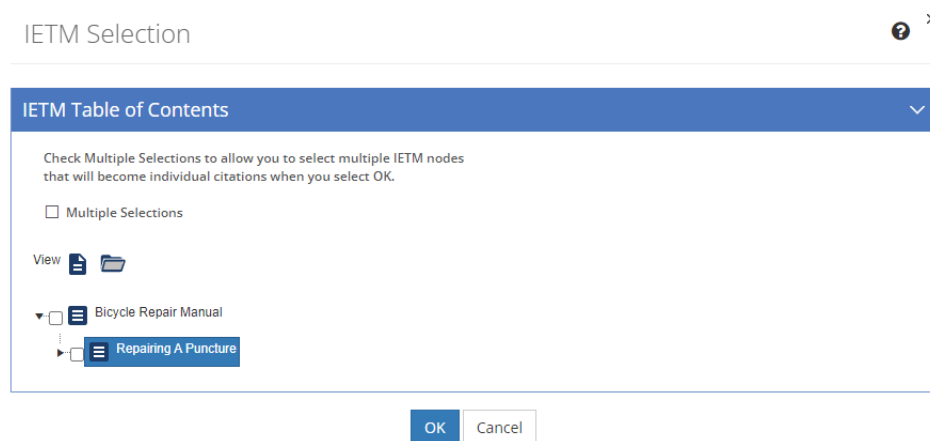


Figure 71: IETM Selection Screen

On this screen you can select a node (or table of contents item) and then select:

- **View** to open the IETM to the selected node, provided you have the correct *URL* listed in the IETM and any necessary software installed.
- **Expand** to open up to five (5) levels of sub-folders of the IETM Table of Contents at a time.

Note: You can also view the IETM Table of Contents on the *Resources > IETMs* screen, by selecting the IETM in the list and then selecting **View** **View** in the toolbar.

3.5.13 Editing a Resource Citation/Entry

You can view or edit *Resource* citations as described below in several places:

- [Sub-Elements](#)¹³⁶ : *Page / Paragraph / Caution / Note / Warning*.
- [Test Items](#)¹⁴¹ , except for the *Performance Job Sheet - Safety Precautions* and *Job Steps* tabs.
- *Test Instructions*.
- [Storyboard](#)¹⁴³ .

3.5.14 Adding or Editing a Sheet Citation/Entry

You can view, add, or edit Sheet citations in several places:

- Sub-Elements - in *Pages* and *Paragraphs*
- *Performance Test Items* - for *Resources* and *Setup Instructions*

3.5.15 Cited Resources

This screen provides you with the ability to review, view and update any resources that are cited anywhere below the selected table of contents item on the *Develop* tab. This screen shows all the resources cited in:

- *Sub-Element>*: *Page / Paragraph / Caution / Note / Warning*
- *Sheets*
- Certain *Test Items*
- *Storyboard*
- *Test Instructions*

Resources ? ×

Resources Cited in Lesson Wheel Removal

Cited Resources

Type: All Find: Text to search × Search

☒ Show Out-of-Date Resources Separately

| | Resource Name | Version Text | Status | Actions |
|--------------------------------------------------------------------------|---------------------------------|--------------|----------|---------|
| IMM (... group continued from the previous page. Showing 4 of 25 items.) | | | | |
| | Rear Wheel Half Removed, BR1 | | Approved | |
| | Rear Wheel Removed, BR1 | | Approved | |
| | Repair Kit - Graphics AIM II | | Approved | |
| | The Sea Breeze Circulation, PPT | | Approved | |
| Publication (Showing 1 of 5 items. Group continues on the next page.) | | | | |
| | Bike Riders | | New | |




◀ ◁ 1 2 3 4 5 **6** 7 8 ▷ ▶

Page size: 5 ▼ Items 26 to 30 of 37 total

Figure 72: Cited Resources

On this screen:

- Use the *Type* drop-down to limit the list of resources to a specific sub-category, as set up on [Customizations](#) ²²⁸ screens.
- Enter a search term in the *Find:* field and select *Search* to list all resources that contain your search term on the screen. Select × to clear the search term and view all items again.
- Select the *Show Out-of-Date Resources Separately* check box to see those outdated resources at the top of the list grouped under: *Items to Update*.
- *Preview* the:
 - *All Resources* spreadsheet listing all cited resources for the selected table of contents item and all items below it in the tree structure.
 - *Missing File Resources* spreadsheet listing all IETMs with a *Comparison File* that is listed with the IETM but cannot be found on the server and all IMM with an *Associated File* that is listed with the IMM but cannot be found on the server.
- View the different versions of a resource by clicking on the arrow ▶ in the first column.
- Select a resource and then:
 - *Preview* the:

- *Related Materials Report* that lists every place below the selected table of contents item where the selected resource is cited or used.
- *Impact Report* that lists every place below the selected table of contents item where *any previous version* of the selected resource is cited or used.
- *All Resources* spreadsheet listing all cited resources for the selected table of contents item and all items below it in the tree structure.
- *Missing File Resources* spreadsheet listing all IETMs with a *Comparison File* that is listed with the IETM but cannot be found on the server and all IMM with an *Associated File* that is listed with the IMM but cannot be found on the server.
- *Update*  to the latest version of a resource everywhere the selected resource is cited below the selected table of contents item. So, if you selected a lesson, selecting *Update* would only update to the latest version of the selected resource in that lesson and any sections within that lesson, but not anywhere else that resource is cited within the course.
- *View*  the resource information.
- *Edit*  the resource information if the resource is not approved.
Note: This will update the resource everywhere it is used in LEAD.

You can click on the column header to sort the entries. Clicking on the column header again, will reverse the sort. Small arrows in the column header let you know which way the data is currently sorted.

3.5.16 Cited Sheets

This screen provides you with the ability to view all the sheets that are listed anywhere below the selected table of contents item on the *Develop* tab and whether they have been cited in a sub-element.

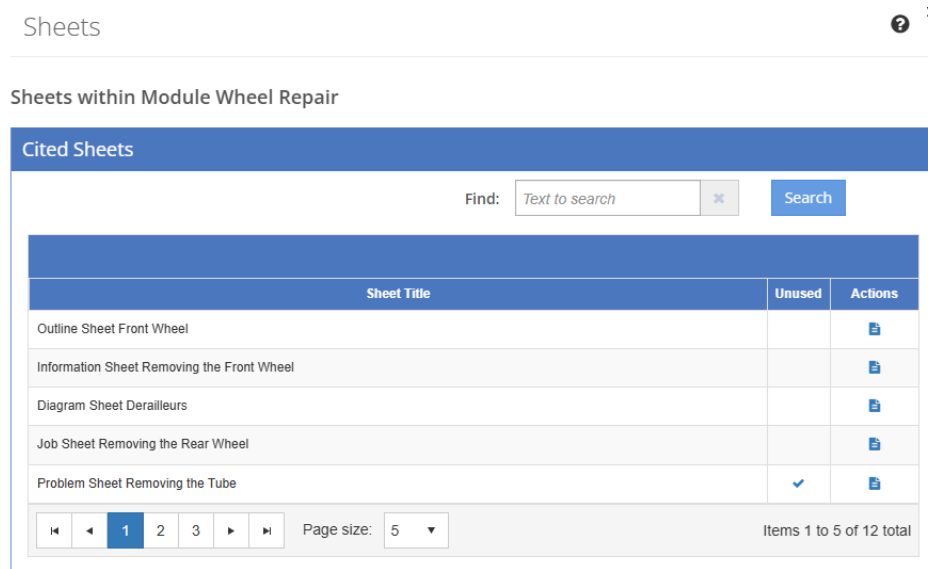


Figure 73: Cited Sheets

On the Cited Sheets screen, you can:

- See a list of the sheets that have been created for the selected table of contents item.
- View a selected sheet.

3.5.17 Assessment

Assessments can be added under the *Curriculum Development* folder to be at the same level as a *Module* (if you have that level in your initiative), or on the same level as a terminal or enabling objective. You can select which enabling objectives will be tested in the assessment in the *Objectives* tab, where you will see all objectives at the same level or below the selected level in the tree structure.

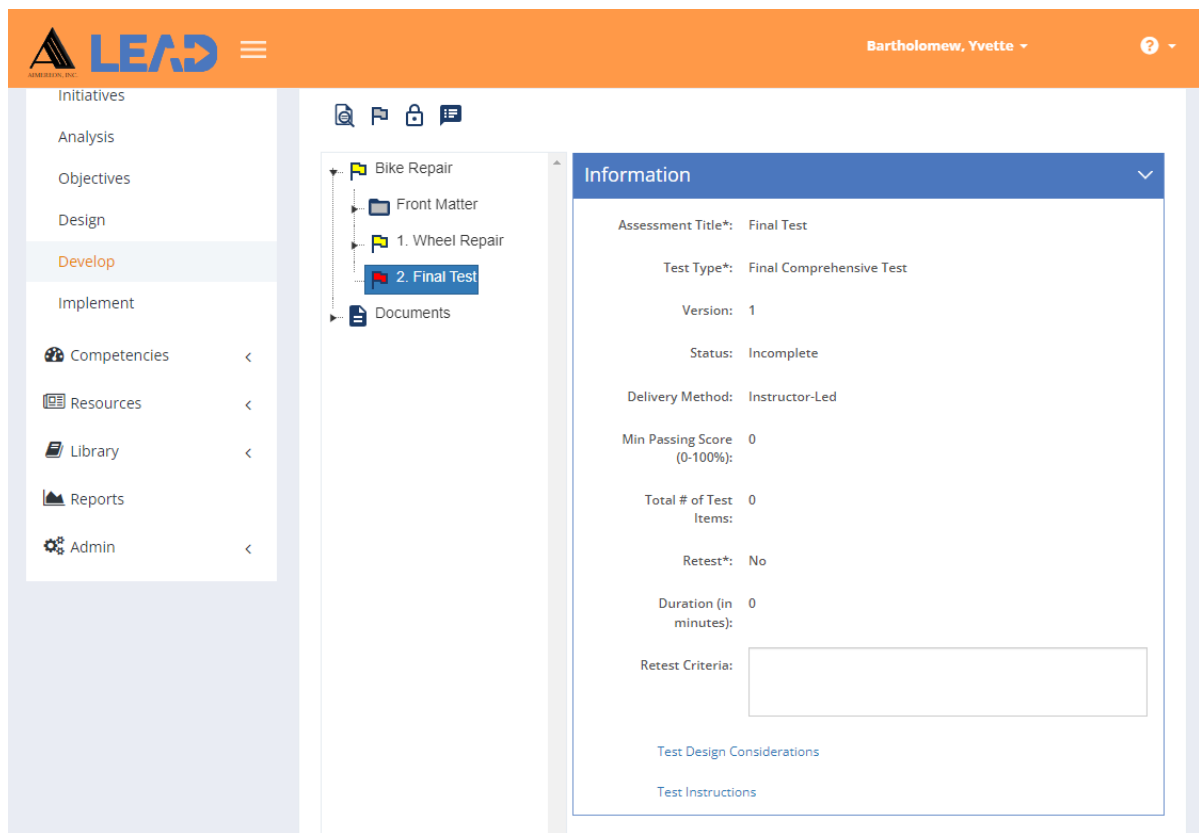








Figure 74: Assessment

On this screen, you can:

- View the assessment information by selecting the assessment.
- Edit the information (including the title).
- Create a New Version  of an approved Assessment, which will automatically also version any unversioned parents (Terminal Objective Level/Lesson and/or Module Level).
- Preview  the *Assessment Test Items*, or the *Assessment Package*, a zip file that contains a preset number of Assessments and corresponding Answer Sheets, along with the Testing Plan, Proctor Instructions, and any required Media (IMM) files.
Note: The Number of Assessment Object Tests to be generated in the Assessment Package can be set on the Customizations > [Configuration](#) ²⁴⁵ tab, using the Number Of Assessment Object Tests setting.
Note: A Performance Assessment will not create multiple versions in the Assessment Package.
- Select [Explain Flag](#) ²²⁰  to review the reasons the table of contents item has been flagged.
- Lock  the table of contents item to prevent edits from taking place.

- **Unlock**  a locked table of contents item to allow edits to take place again.
- Select [View Comments](#)  to view, edit, and add to the comments.
- *View the Test Design Considerations at every level that provide information about the table of contents item to help with the development of the learning event.*

3.5.18 Documents

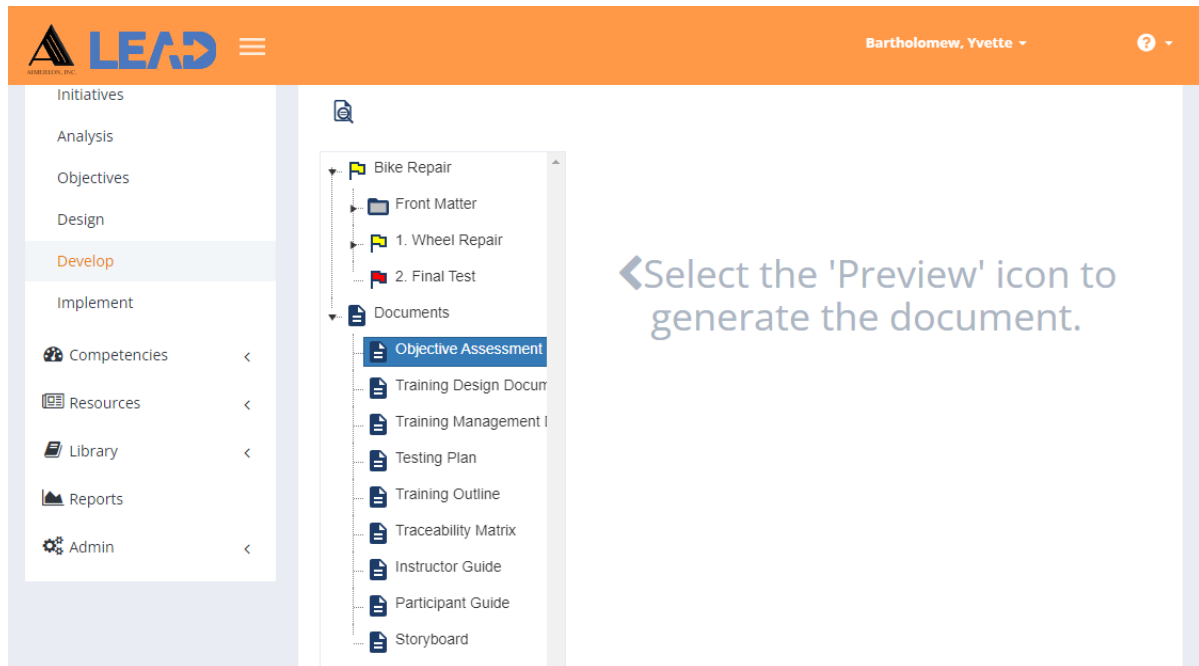



Figure 75: Initiatives > Develop > Documents



Expand  the *Documents* folder to see the available options:

- *Objective Assessment Information* - a spreadsheet that contains the objectives along with their assessment information, as detailed on the *Objectives* tab.
- *Training Design Document* - a PDF document of the table of contents items under the *Curriculum Development* folder on the *Design* tab, along with the objectives, the design considerations, assessment information, and the test design considerations. You can choose whether to include any comments on the *Output Options* screen.
- *Training Management Document* - a PDF document of the information listed under the *Training Management Document*, plus the table of contents items under the *Curriculum Development* folder on the *Design* tab, along with the objectives. You can choose whether to include any comments on the *Output Options* screen.
- *Testing Plan* - a PDF document of the information listed under the *Testing Plan* folder on the *Design* tab. You can choose whether to include any comments on the *Output Options* screen.

- *Training Outline* - a spreadsheet listing the table of contents items under the *Curriculum Development* folder on the *Design* tab, along with their status and their objectives. You can choose whether to include any comments on the *Output Options* screen.
- *Traceability Matrix* - a spreadsheet listing the table of contents items under the *Curriculum Development* folder on the *Design* tab, the objectives for each applicable table of contents item, the skills of the task analysis that support the objectives, along with the competencies that the skills are based on.
- *Instructor Guide* - a PDF document for the instructors to use to instruct/teach the initiative. You can choose which of the delivery methods of the EO levels to include using the *Output Options*, whether the main elements should output continuously or start per page, as well as whether to include any comments.
- *Participant Guide* - a PDF document for the participants to use while being taught. You can choose which of the delivery methods of the EO levels to include using the *Output Options*, as well as whether to include any comments.
- *Storyboard* - a PDF document of all table of contents items, along with the elements, sub-elements, test items, and any entered storyboard information. You can choose which of the delivery methods of the EO levels to include using the *Output Options*, as well as whether to include any comments.

Select the document you wish to create in the tree structure. Then select *Preview*  to generate the document.

3.6 Implement

On the *Implement* screen, you can create outputs for a specific initiative. Simply find the output you would like to generate. Select it in the list and select *View* . If an output has options, they will show in the [Output Options](#)  screen for you to set as desired.

LEAD

Bartholomew, Yvette

Find: Search

| Name | Description | Actions |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------|---------|
| Printed Guides | | |
| Instructor Guide | Generates a PDF document for the instructors or facilitators to use to conduct training. | |
| Participant Guide | Generates a PDF document for the participant or trainee to use while being taught. | |
| Training Packages | | |
| Instructor Guide Package | Generates a package that includes the IG and IMM to use by the instructor or facilitator to conduct training. | |
| Participant Guide Package | Generates a package that includes the PG and IMM to use by the participant or trainee while being taught. | |
| Assessment Package | Generates an Assessment package, including the Testing Plan, Proctor Instructions, Assessments, and Answer Sheets for the Assessments. | |
| ILT Package | Generates a package that includes the IG, PG, IMM, Testing Plan, and Assessments. | |
| SCORM Package | Generates a SCORM-compliant package of the current Initiative. | |

Page size: 7 Items 1 to 7 of 16 total

Figure 76: Initiatives > Implement

The outputs are organized in groups on the screen:

- Printed Guides - same output as found on the *Develop* tab.
 - *Instructor Guide* - a PDF document for the instructors to use to instruct/teach the initiative. You can choose which of the delivery methods of the EO levels to include using the *Output Options*, whether the main elements should output continuously or start per page, as well as whether to include any comments.
 - *Participant Guide* - a PDF document for the participants to use while being taught. You can choose which of the delivery methods of the EO levels to include using the *Output Options*, as well as whether to include any comments.
- Training Packages - combined outputs to support teaching the content or for further development.
 - *Instructor Guide Package* - a zip file that includes the IG and IMM to use by the instructors to instruct/teach the initiative. You can choose which of the delivery methods of the EO levels to include using the *Output Options*, whether the main elements should output continuously or start per page, as well as whether to include any comments.
 - *Participant Guide Package* - a zip file that includes the PG and IMM to use by the participants while being taught. You can choose which of the delivery methods of the

EO levels to include using the *Output Options*, as well as whether to include any comments.

- *Assessment Package* - a zip file that contains a preset number of Assessments and corresponding Answer Sheets, along with the Testing Plan, Proctor Instructions, and any required Media (IMM files).

Note: The *Number of Assessment Object Tests* to be generated in the *Assessment Package* can be set on the *Customizations* > [Configuration](#)²⁴⁵ tab, using the *Number Of Assessment Object Tests* setting.


Note: A *Performance Assessment* will not create multiple versions in the *Assessment Package*.

- *ILT Package* - a zip file that includes the IG, PG, IMM, Testing Plan, and Assessments. You can choose which of the delivery methods of the EO levels to include using the *Output Options*, whether the main elements should output continuously or start per page, as well as whether to include any comments.
- *SCORM Package* - a SCORM-compliant zip file that can be imported to a Learning Management System or used for further development in an e-learning tool.
- *Management Documents* - same output as found on the *Analysis* and *Design* tabs.
 - *Training Needs Analysis* - a PDF document of the information contained in the *Training Needs Analysis* folders, this will always output the current TNA, whether that's the first TNA or the latest Modification TNA. You can choose whether to include any comments on the *Output Options* screen.
 - *Training Management Document* - a PDF document of the information listed under the *Training Management Document*, plus the table of contents under the *Curriculum Development* folder, along with the objectives. You can choose whether to include any comments on the *Output Options* screen.
 - *Testing Plan* - a PDF document of the information listed under the *Testing Plan* folder. You can choose whether to include any comments on the *Output Options* screen.
- *Management Reports* - same output as found on the *Analysis* and *Design* tabs.
 - *Skill Hierarchy* - a PDF document of the skill structure that is contained in the *Task Analysis* folders. You can choose whether to include any comments on the *Output Options* screen.
 - *Objective Assessment Information* - a spreadsheet that contains the objectives along with their assessment information, as detailed on the *Objectives* tab.
 - *Traceability Matrix* - a spreadsheet listing the table of contents under the *Curriculum Development* folder on the *Design* tab, the objectives for each applicable table of

contents item, the skills of the task analysis that support the objectives, along with the competencies that the skills are based on.

- *All Comments* - a PDF document that lists all comments that have been made by area in the initiative. You can choose which comment statuses to include in the report on the *Output Options* screen.
- Training Outline Documents - same output as found on the *Design* tab.
 - *Training Outline* - a PDF document listing the table of contents under the *Curriculum Development* folder, along with their status and their objectives. You can choose whether to include any comments on the *Output Options* screen.
 - *Training Design Document* - a PDF document of the table of contents items under the *Curriculum Development* folder on the *Design* tab, along with the objectives, the design considerations, assessment information, and the test design considerations. You can choose whether to include any comments on the *Output Options* screen.

Finding Outputs

If you can't find the output you're looking for, enter a search term in the *Find:* field and select *Search*. The table will list all output that contain your search term on the screen. Select  to clear the search term and view all items again.

You can also sort the order of the output that is listed on the screen to find the relevant output. You can click on the column headers of each table to sort the entries by that column. Clicking on a column header again will reverse the sort. Clicking on the column header a third time will remove the sort. Small arrows in the column header let you know which way the data is currently sorted.

This page is intentionally left blank.



Competencies

This chapter describes the competencies that are available in LEAD, that you can base your task analysis on.

4 Competencies

On this screen, you can review the competencies that form the basis of tasks, subtasks, and steps (aka skills) in the task analysis of the initiative. Those skills are then used as the basis for the learning objectives, which in turn are the basis for the content in the initiative.

In LEAD, we provide you with the Department of Labor (DOL) O*NET Tasks, Knowledge, Skills, and Abilities listing, based on the DOL's Standard Occupational Classification (SOC). You may wish to use the O*NET website: <https://www.onetonline.org/> to find the relevant information for your initiative. You can also review the occupational information directly in LEAD.

The DOL SOC classifies occupations at four levels of aggregation: Major Occupation, Minor Occupation, Broad Jobs, and Jobs. These groups are reflected in the *Type* field in LEAD, while the *Major/Minor/Broad/Job Code* is the specific code for that job or occupation.

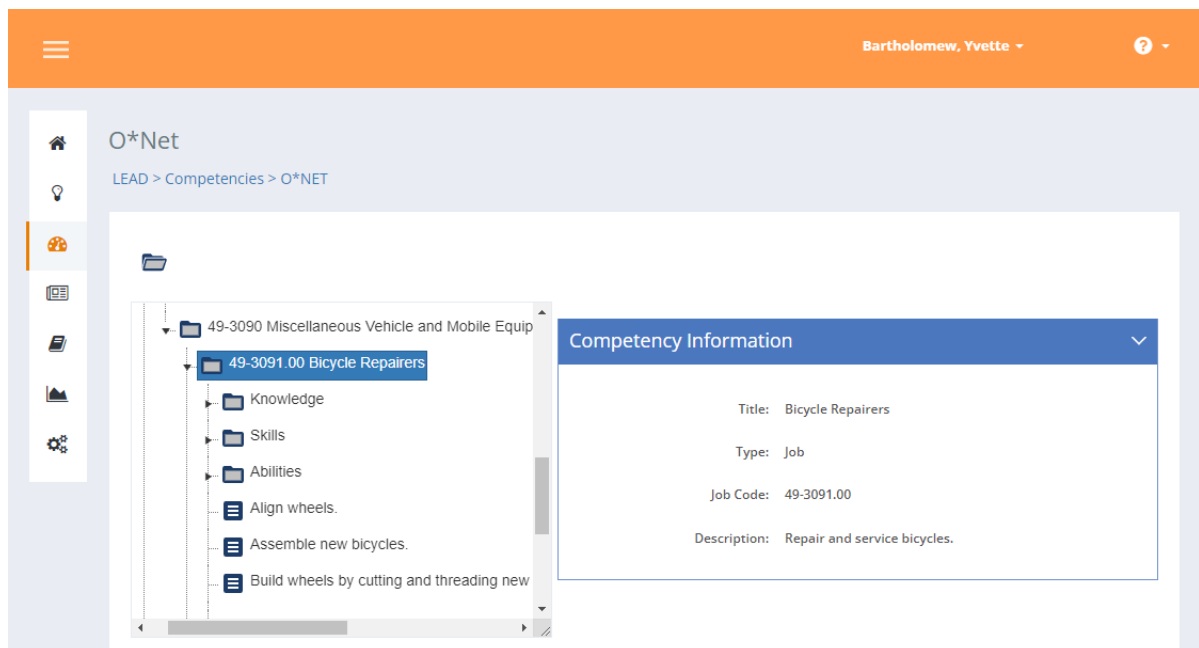




Figure 77: Competencies

On this screen:

- To make more room to see items in the tree structure, click and drag the bottom right corner of the tree window (or frame).
- To make even more room, click on the three-bar icon  next to LEAD in the header bar to minimize the main menu to show only the icons. To see all of the menu items again, click on the three-bar icon again.
- Select a folder and then *Expand*  to open up the folders up to three levels at a time:
 - Selecting the *O*Net* folder and then *Expand* opens up to the *Broad Jobs* folders.

- Selecting a *Major Occupation* folder and then *Expand* opens up to the *Jobs* folders under the selected *Major Occupation* folder.
- Selecting a *Minor Occupation* folder and then *Expand* opens up to the *Tasks* of all *Jobs* under the selected *Minor Occupation* folder.
- Selecting a *Broad Job* folder and then *Expand* opens up all entries of each *Job*, including the *Tasks*, *Knowledge*, *Skills*, and *Abilities* under the selected *Broad Jobs* folder.

This page is intentionally left blank.



Resources

This chapter describes the resources available in the software that you can add to and reuse many times in your initiatives.

5 Resources

Resources are all the things you use to support the delivery of a learning event. We recommend that you include those resources that the instructor or facilitator needs to deliver the learning event and whose costs you want or need to track. Resources are used or cited extensively in initiatives, specifically, on the following screens:

- *Analysis* - in the *Training Needs Analysis* and the *Task Analysis*.
- *Design* - in the *Training Management Document*.
- *Develop* - in the initiative contents: pages and paragraphs, sheets, and test items.

On the *Resources* screens you can create and manage the following types of resources:

- [Consumables](#)¹⁶² - any type of resource that is used up during the delivery of a learning event, e.g., flip chart paper and pens.
- [IETMs](#)¹⁶⁴ - Interactive Electronic Technical Manuals that you can link to a specific node (or table of contents entry) and launch directly to that specific node during a learning event.
- [IMM](#)¹⁶⁷ - Instructional Media Material are all types of media that can be used in a learning event, including Microsoft® PowerPoint® slides, graphics, animations, simulations, videos, and models (whether electronic or physical).
- [Publications](#)¹⁶⁹ - including instructions, manuals, books, articles, websites, and other published materials.
- [Software](#)¹⁷¹ - that is needed to deliver or that is used during the learning events, whether used by the instructor, facilitator, or the participant.
- [Tool/Equipment](#)¹⁷³ - includes all tools or equipment that used during the learning event, including hand tools, power tools, computers, maintenance trainers, and all other kinds of training equipment.






You can set up the resource sub-categories on the [Customizations](#)²²⁸ screens, to enable you to define groups of resources within the main categories.








5.1 Consumables

On the *Consumables* screen, you can create and manage the consumables that are used in initiatives. Consumables are any type of resource that is used during the delivery of a learning event and needs to be replenished or replaced at the end of the event, e.g., flip chart paper and pens, or participant guides and handouts, or oil and oil filters.

Figure 78: Consumables

On the *Consumables* screen, you can:

- Add a  **New** consumable to the existing list by selecting **+ New**.
- *Preview*  the *All Consumables* spreadsheet listing all consumable entries with all the details in LEAD for each entry, or the *Unused Resources* spreadsheet listing all consumables that are not cited anywhere in LEAD.
- View and manage all unused consumables on the [Unused Resource Management](#)  screen.
- View the different versions of a consumable by clicking on the arrow ► in the first column.
- Select a consumable and then:
 - *Create a New Version*  of an approved consumable, which will automatically flag all initiatives and places within those initiatives where the selected consumable is cited or used.
 - *Preview*  the:
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected consumable is cited or used.

- *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected consumable is cited or used.
- *All Resources* spreadsheet listing all consumable entries with all the details in LEAD for each entry.
- *Unused Resources* spreadsheet listing all consumables that are not cited anywhere in LEAD.
- [Replace](#)  one consumable with another consumable in the list.
Note: This will replace the consumable everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
- [View](#)  the consumable information.
- To approve the consumable, select [View](#)  and review the information, then select *Approve*.
Note: Consumables are automatically approved when the initiative that cites/uses the consumables is approved.
- [Edit](#)  the consumable information, as long as it has not been approved.
- [Show History](#)  to review the changes made to the consumable, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- [Delete](#)  the consumable, if has not been cited in any initiative. Once you've selected *OK* to the confirmation message, the *Data Item Deletion* screen displays. Enter the title of the consumable to confirm the deletion.
Note: You can copy and paste the title from the screen into the field to make it easier on yourself. If you only enter a partial title, the item will not be deleted, and the *Data Item Deletion* screen stays open, ready for you to try again.

5.2 IETMs










On the *IETMs* screen, you can add and manage the Interactive Electronic Technical Manuals (IETMs) that are used in initiatives. The IETM extraction file can be imported into LEAD and then referenced in the initiative down to a specific node (table of contents item).

The screenshot displays the LEAD IETMs screen. The top header is orange with the LEAD logo and user name 'Bartholomew, Yvette'. A sidebar on the left lists navigation options: Home, Initiatives, Competencies, Resources (selected), Consumables, IETMs, IMM, Publications, Software, Tools/Equipment, Library, Reports, and Admin. The main content area is titled 'IETMs' and shows a table of IETMs. The table has columns: No, Title, Number, Version, Status, Actions, and Delete. The first row is expanded, showing details for 'Bicycle Repair Manual' (Rev 1 Chg 1, Status: New). Below this, a sub-table lists the contents of the manual, including 'Bicycle Repair Manual' (Rev 1 Chg 0, Status: Approved) and 'Bicycle Repair Manual' (Rev 0 Chg 0, Status: Approved). The table also shows other IETMs like 'Bike Repair', 'FCS MK 90 MOD 7/GS MK 6', 'FCS MK 98 MOD 6/GS MK 6', and 'Fire Control System'. The bottom of the screen shows pagination controls and a page size of 5.

Figure 79: IETMs

On the *IETMs* screen, you can:

- Add/Import a **+ New** IETM by selecting + *New*.
- **Q View** the [IETM Table of Contents](#)¹⁴⁵ by selecting *View* in the toolbar. This opens the *IETM* screen listing the IETM Table of Contents. Select an IETM Table of Contents item or node, then select:
 - **View** to open the IETM to the selected node, provided you have the correct *URL* listed in the IETM and any necessary software installed.
 - **Expand** to open up to five (5) levels of sub-folders of the IETM Table of Contents at a time.
 - **Close** to return to the *IETMs* screen.
- **Preview** the:
 - *All IETMs* spreadsheet listing all IETM entries with all the details in LEAD for each entry.
 - *Unused Resources* spreadsheet listing all IETMs that are not cited anywhere in LEAD.

- *Missing File Resources* spreadsheet listing all IETMs with a *Comparison File* that is listed with the IETM but cannot be found on the server.
- View and manage all unused IETMs on the [Unused Resource Management](#)¹⁷⁵  screen.
- View the different versions of an IETM by clicking on the arrow ► in the first column.
- Select an IETM and then:
 - *Create a New Version*  of an approved IETM, which will automatically flag all initiatives and places within those initiatives where the selected IETM is cited or used.
 - *Preview*  the:
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected IETM is cited or used.
 - *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected IETM is cited or used.
 - *Missing File Resources* spreadsheet listing all IETMs with a *Comparison File* that is listed with the IETM but cannot be found on the server.
 - *All Resources* spreadsheet listing all IETM entries with all the details in LEAD for each entry.
 - *Unused Resources* spreadsheet listing all IETMs that are not cited anywhere in LEAD.
 - *Replace*²⁰⁹  one IETM with another IETM in the list.
Note: This will replace the IETM everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
 - *View*  the IETM information by selecting *View* in the *Actions* column.
 - To approve the IETM, select *View*  IETM and review the information, then select *Approve*.
Note: IETMs are automatically approved when the initiative that cites/uses the IETMs is approved.
 - *Edit*  the IETM information, as long as it has not been approved.
 - *Show History*²¹⁰  to review the changes made to the IETM, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - *Delete* ✕ the IETM, if has not been cited in any initiative. Once you've selected OK to the confirmation message, the *Data Item Deletion* screen displays. Enter the title of the IETM to confirm the deletion.
Note: You can copy and paste the title from the screen into the field to make it easier

on yourself. If you only enter a partial title, the item will not be deleted, and the *Data Item Deletion* screen stays open, ready for you to try again.

5.3 IMM


On the *IMM* screen, you can create and manage the Instructional Media Materials (IMM) that are used in initiatives. IMM are all types of media that can be used in a learning event, including Microsoft® PowerPoint® slides, graphics, videos, models (electronic and physical), and animations.










The screenshot shows the LEAD application interface. The top navigation bar is orange with the LEAD logo and a user profile for 'Bartholomew, Yvette'. A left sidebar contains navigation links: Home, Initiatives, Competencies, Resources (selected), Consumables, IETMs, IMM (highlighted), Publications, Software, Tools/Equipment, Library, Reports, and Admin. The main content area is titled 'IMM' with a breadcrumb 'LEAD > Resources > IMM'. It features a search bar with 'Filter: All' and 'Find: Text to search'. Below is a table of IMM entries with columns: No, Title, Number, Version, Status, Actions, and Delete. The table lists several items, including 'Check for Tire and Wheel Problems', 'Comparison Report', and 'Complete Bike Inverted' (multiple versions). A pagination bar at the bottom shows 'Page size: 5' and 'Items 56 to 60 of 169 total'.

| No | Title | Number | Version | Status | Actions | Delete |
|----|------------------------------------------|------------------------------------------|---------|----------|---------|--------|
| 78 | Check for Tire and Wheel Problems | BR222 | | Approved | [Icon] | [X] |
| 79 | Comparison Report | Lesson Section Content Comparison Report | | New | [Icon] | [X] |
| 80 | Complete Bike Inverted - Graphics AIM I | | 2 | Approved | [Icon] | [X] |
| 81 | Complete Bike Inverted - Graphics AIM II | | | Approved | [Icon] | [X] |
| 82 | Complete Bike Inverted | BR1-2110 | | Approved | [Icon] | [X] |

Figure 80: IMM

On the *IMM* screen, you can:

- Add a **+ New** IMM to the existing list by clicking on + New.
- Preview  the:
 - *All IMM* spreadsheet listing all IMM entries with all the details in LEAD for each entry.
 - *Unused Resources* spreadsheet listing all IMM entries that are not cited anywhere in LEAD.

- *Missing File Resources* spreadsheet listing all IMM with an *Associated File* that is listed with the IMM but cannot be found on the server.
- View and manage all unused IMM on the [Unused Resource Management](#)¹⁷⁵  screen.
- View the different versions of an IMM by clicking on the arrow ► in the first column.
- Select an IMM and then:
 - *Create a New Version*  of an approved IMM, which will automatically flag all initiatives and places within those initiatives where the selected IMM is cited or used.
 - *Preview*  the:
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected IMM is cited or used.
 - *Missing File Resources* spreadsheet listing all IMM with an *Associated File* that is listed with the IMM but cannot be found on the server.
 - *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected IMM is cited or used.
 - *All Resources* spreadsheet listing all IMM entries with all the details in LEAD for each entry.
 - *Unused Resources* spreadsheet listing all IMM that are not cited anywhere in LEAD.
 - *Replace*²⁰⁹  one IMM with another IMM in the list.
Note: This will replace the IMM everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
 - *View*  the IMM information.
 - To approve the IMM, select *View*  and review the information, then select *Approve*.
Note: IMM are automatically approved when the initiative that cites/uses the IMM is approved.
 - *Edit*  the IMM information, which includes the ability to *Update* the associated file, as long as the IMM is not approved.
 - *Show History*²¹⁰  to review the changes made to the IMM, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - *Delete* ✕ the IMM, if has not been cited in any initiative. Once you've selected *OK* to the confirmation message, the *Data Item Deletion* screen displays. Enter the title of the IMM to confirm the deletion.
Note: You can copy and paste the title from the screen into the field to make it easier

on yourself. If you only enter a partial title, the item will not be deleted, and the *Data Item Deletion* screen stays open, ready for you to try again.

5.4 Publications

On the *Publications* screen, you can create and manage the publications that are used in initiatives. Publications includes all information sources that are not purely media based (like videos), e.g., books, articles, journals, magazines, manuals, instructions, newspapers, as well as online information sources, like specific articles on websites or even entire websites (if appropriate).

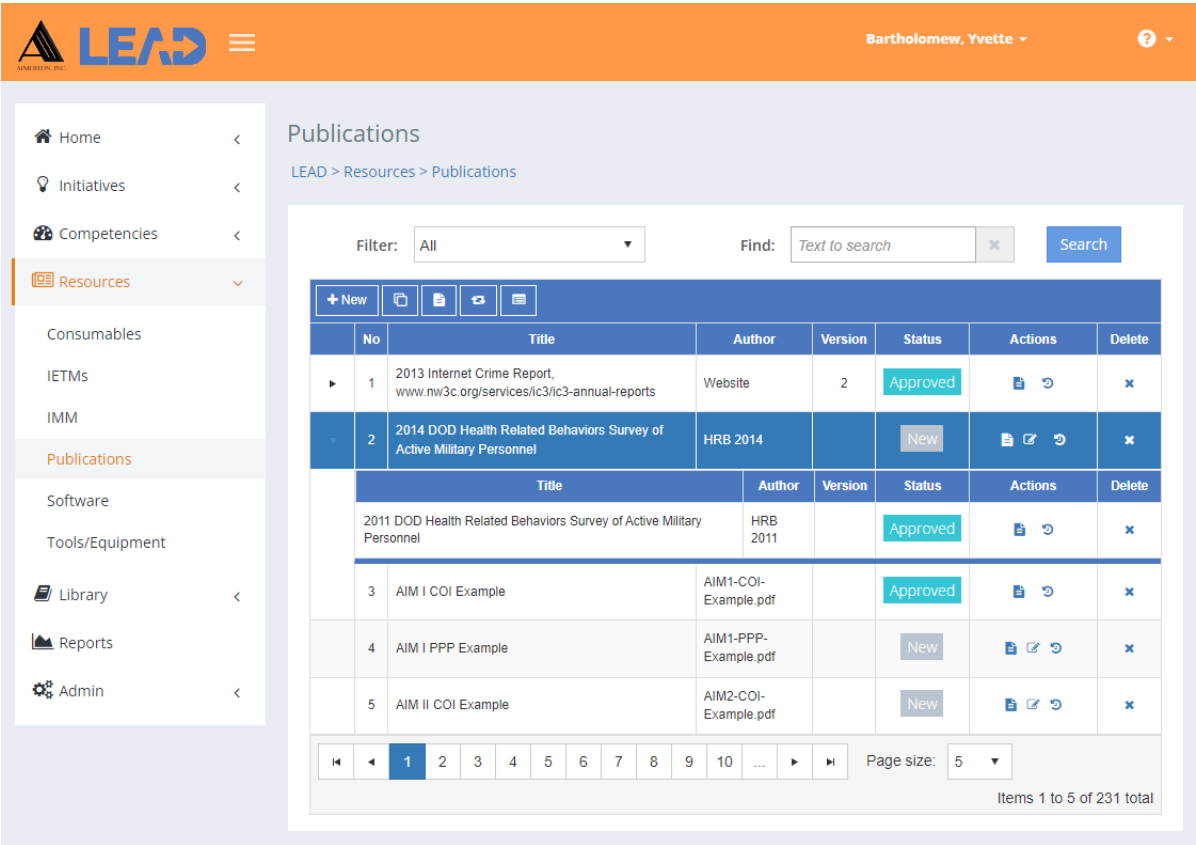













Figure 81: Publications

On the *Publications* screen, you can:

- Add a **+ New** publication to the existing list by clicking on + New.
- *Preview*  the *All Publications* spreadsheet listing all publication entries with all the details in LEAD for each entry, or the *Unused Resources* spreadsheet listing all publications that are not cited anywhere in LEAD.

- View and manage all unused publications on the [Unused Resource Management](#)  screen.
- View the different versions of a publication by clicking on the arrow ► in the first column.
- Select a publication and then:
 - *Create a New Version*  of an approved publication, which will automatically flag all initiatives and places within those initiatives where the selected publication is cited or used.
 - *Preview*  the:
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected publication is cited or used.
 - *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected publication is cited or used.
 - *All Resources* spreadsheet listing all publication entries with all the details in LEAD for each entry.
 - *Unused Resources* spreadsheet listing all publications that are not cited anywhere in LEAD.
 - *Replace*  ²⁰⁹ one publication with another publication in the list.
Note: This will replace the publication everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
 - *View*  the publication information.
 - To approve the publication, select *View*  and review the information, then select *Approve*.
Note: Publications are automatically approved when the initiative that cites/uses the Publications is approved.
 - *Edit*  the publication information, as long as it has not been approved.
 - *Show History*  ²¹⁰ to review the changes made to the publication, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - *Delete*  the publication, if has not been cited in any initiative. Once you've selected OK to the confirmation message, the *Data Item Deletion* screen displays. Enter the title of the publication to confirm the deletion.
Note: You can copy and paste the title from the screen into the field to make it easier on yourself. If you only enter a partial title, the item will not be deleted, and the *Data Item Deletion* screen stays open, ready for you to try again.

5.5 Software











On the *Software* screen, you can create and manage the software that are used in initiatives, whether by the participant or by the instructor.

| No | Title | Version | Status | Actions | Delete |
|----|-------------------------------------------------------|---------|----------|---------|--------|
| 1 | AIM Learning Object (LO) Module | | New | | |
| 2 | Authoring Instructional Materials (AIM I) | 5.0 | Approved | | |
| | AIM I | v. 4.0 | Approved | | |
| 3 | Navy Financial Planning Worksheet | Latest | Approved | | |
| 4 | Task Based Authoring Instructional Materials (AIM II) | | New | | |

Figure 82: Software

On the *Software* screen, you can:

- Add a **+ New** software entry to the existing list by clicking on + *New*.
- *Preview* the *All Software* spreadsheet listing all software entries with all the details in LEAD for each entry, or the *Unused Resources* spreadsheet listing all software entries that are not cited anywhere in LEAD.
- View and manage all unused software on the [Unused Resource Management](#) screen.
- View the different versions of a software entry by clicking on the arrow in the first column.
- Select a software entry and then:



- *Create a New Version*  of an approved software entry, which will automatically flag all initiatives and places within those initiatives where the selected software is cited or used.
- *Preview*  the:
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected software is cited or used.
 - *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected software is cited or used.
 - *All Resources* spreadsheet listing all software entries with all the details in LEAD for each entry.
 - *Unused Resources* spreadsheet listing all software entries that are not cited anywhere in LEAD.
- *Replace*  ²⁰⁹ one software with another software in the list.
Note: This will replace the software everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
- *View*  the software information.
- To approve the software, select *View*  and review the information, then select *Approve*.
Note: Software entries are automatically approved when the initiative that cites/uses the Software is approved.
- *Edit*  the software information, as long as it has not been approved.
- *Show History*  ²¹⁰  to review the changes made to the software, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete*  the software, if has not been cited in any initiative. Once you've selected *OK* to the confirmation message, the *Data Item Deletion* screen displays. Enter the title of the software to confirm the deletion.
Note: You can copy and paste the title from the screen into the field to make it easier on yourself. If you only enter a partial title, the item will not be deleted, and the *Data Item Deletion* screen stays open, ready for you to try again.





5.6 Tools/Equipment




On the *Tools/Equipment* screen, you can create and manage the tools and equipment that are used in initiatives. This includes all tools or equipment that are used during the learning event, including hand tools, power tools, computers, maintenance trainers, and all other kinds of training devices.





Figure 83: Tools/Equipment

On the *Tools/Equipment* screen, you can:

- Add a **+ New** tool or piece of equipment to the existing list by clicking on + *New*.
- *Preview*  the *All Tools/Equipment* spreadsheet listing all tools and equipment entries with all the details in LEAD for each entry, or the *Unused Resources* spreadsheet listing all tools and equipment entries that are not cited anywhere in LEAD.
- View and manage all unused tools and equipment entries on the [Unused Resource Management](#)  screen.
- View the different versions of a tool or piece of equipment by clicking on the arrow ► in the first column.
- Select a tool or piece of equipment and then:

- *Create a New Version*  of an approved tool or piece of equipment, which will automatically flag all initiatives and places within those initiatives where the selected tool or piece of equipment is cited or used.
- *Preview*  the:
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected tool or piece of equipment is cited or used.
 - *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected tool or piece of equipment is cited or used.
 - *All Resources* spreadsheet listing all tools and equipment entries with all the details in LEAD for each entry.
 - *Unused Resources* spreadsheet listing all tools and equipment that are not cited anywhere in LEAD.
- *Replace* ²⁰⁹  one tool or piece of equipment with another tool or piece of equipment in the list.

Note: This will replace the tool or piece of equipment everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
- *View*  the tool or piece of equipment information.
- To approve the tool or piece of equipment, select *View*  and review then information, then select *Approve*.

Note: Tools or Equipment are automatically approved when the initiative that cites/uses the Tools or Equipment is approved.
- *Edit*  the tool or piece of equipment information, as long as it has not been approved.
- *Show History* ²¹⁰  to review the changes made to the tool or piece of equipment, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete*  the tool or piece of equipment, if has not been cited in any initiative. Once you've selected OK to the confirmation message, the *Data Item Deletion* screen displays. Enter the title of the tool or piece of equipment to confirm the deletion.

Note: You can copy and paste the title from the screen into the field to make it easier on yourself. If you only enter a partial title, the item will not be deleted, and the *Data Item Deletion* screen stays open, ready for you to try again.

5.7 Unused Resource Management

On the *Unused Resource Management* screen, you can view and remove resources that are **not** cited anywhere in LEAD. This is independent of versions, so if versions 1 and 3 of a publication are cited in initiatives and version 2 is not, then version 2 of the publication will be listed on the *Unused Resource Management* screen and can be deleted/removed.

Note: When it comes to intervening versions of an IETM, where a later version has a comparison file, you will get a message when you delete the IETM to remind you to check the grouping and comparison files of the other versions of the IETM to ensure they are still associated properly to each other.

Unused Resource Management ? x

Type: Find:



| | No | Sel | Resource Name | View |
|--|----|--------------------------|------------------------------|------|
| | 1 | <input type="checkbox"/> | Bicycle Photo | |
| | 2 | <input type="checkbox"/> | BR101-100-10-1-2-1-Problem-1 | |
| | 3 | <input type="checkbox"/> | BR101-100-10-1-2-1-Problem-1 | |
| | 4 | <input type="checkbox"/> | BR101-100-10-1-2-1-Problem-1 | |
| | 5 | <input type="checkbox"/> | BR101-100-10-1-2-1-Problem-1 | |
| | 6 | <input type="checkbox"/> | BR101-100-10-1-2-1-Problem-1 | |
| | 7 | <input type="checkbox"/> | BR101-100-10-1-2-1-Problem-1 | |

Page size: Items 1 to 7 of 22 total

Figure 84: Unused Resource Management Screen

On this screen:

- Use the *Type* drop-down to limit the list of resources to a specific category or sub-category, as set up on [Customizations](#) ²²⁸ screens.
- Enter a search term in the *Find:* field and select *Search* to list all resources that contain your search term on the screen. Select to clear the search term and view all items again.
- *Export* a spreadsheet listing all unused resources regardless of the selected *Type*.
- View the different versions of a resource that are also unused (not cited) by clicking on the arrow in the first column.

- Select a resource and then:
 - View  the resource information.
 - [Show History](#)  to review the changes made to the consumable, including the user name and date/time of saved changes.
 - *Remove* the resource. This will remove the selected resource(s) from LEAD after another check to ensure the selected resources are still not cited anywhere in LEAD.

You can click on the column header to sort the entries. Clicking on the column header again, will reverse the sort. Small arrows in the column header let you know which way the data is currently sorted.



Library

This chapter describes the library items available in LEAD that you can add to and reuse many times in your initiatives.

6 Library

On the *Library* screens, you can set up and manage the following:

- [Verbs](#)¹⁷⁸ - create and manage the verbs that are used the task analysis, whose skills form the basis for the learning objectives in LEAD.
- [Conditions](#)¹⁸⁰ - create and manage the conditions that are used the task analysis, whose skills form the basis for the learning objectives in LEAD.
- [Standards](#)¹⁸¹ - create and manage the standards that are used the task analysis, whose skills form the basis for the learning objectives in LEAD.
- [Knowledge](#)¹⁸³ - create and manage the knowledge entries that are used in the task analysis and which can also be used as the basis for learning objectives.
- [Skills](#)¹⁸⁵ - create and manage the skill entries that are used in the task analysis and which can also be used as the basis for learning objectives.
- [Abilities](#)¹⁸⁷ - create and manage the ability entries that are used in the task analysis and which can also be used as the basis for learning objectives.
- [Interventions](#)¹⁸⁸ - create and manage the existing interventions that are used to show which skills are already being taught in existing learning events, particularly those outside of LEAD.

6.1 Verbs

On the *Verbs* screen, you can create and manage the verbs that are used for the skills in the task analysis in LEAD.

Verbs

LEAD > Library > Verbs

Find:





| No | Title | Status | Actions | Delete |
|----|-------------|----------|---------|--------|
| 1 | Abort | Approved | | |
| 2 | Accelerate | New | | |
| 3 | Accept | Approved | | |
| 4 | Access | Approved | | |
| 5 | Acclimatize | Approved | | |
| 6 | Accomplish | Approved | | |
| 7 | Accumulate | Approved | | |

Page size: 7
Items 1 to 7 of 606 total

Figure 85: Verbs

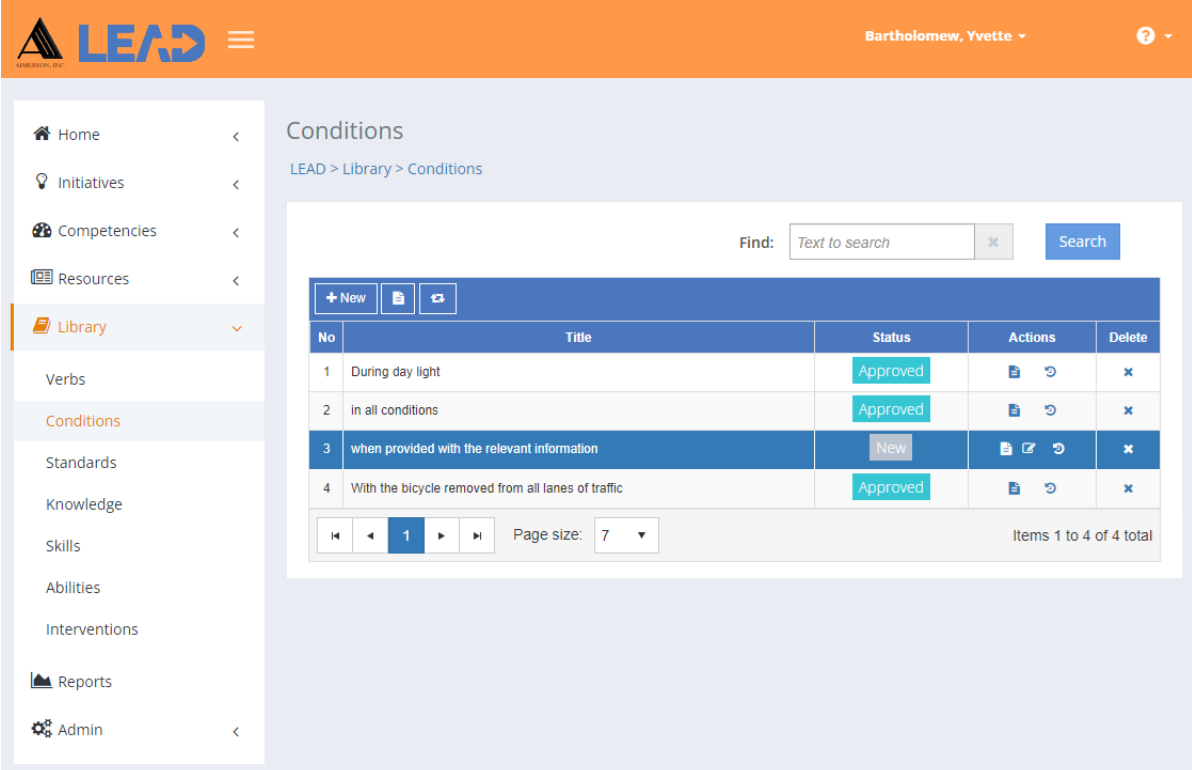
On the *Verbs* screen, you can:

- Add a **New** verb to the existing list by clicking on + New.
- **Preview** the *All Verbs* spreadsheet listing all verbs entries with all the details in LEAD for each entry.
- Select a verb and then:
 - **Preview** the:
 - *All Verbs* spreadsheet listing all verbs entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected verb is cited or used.
 - **Replace** ²⁰⁹ one verb with another verb in the list.
Note: This will replace the verb everywhere it is used, including in approved initiatives! Hence, you will only see **Replace** , when you have the *Replace* privilege as part of your role.
 - **View** the verb information.

- To approve the verb, select **View**  and then select **Approve**.
Note: Verbs are automatically approved when the initiative that cites/uses the verbs is approved.
- **Edit**  the verb information, as long as it has not been approved.
- Select **Show History**  to review the changes made to the verb, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- **Delete**  the verb, if has not been cited in the task analysis of any initiative. Once you've selected **OK** to the confirmation message, an **Undo** button displays on the bottom left of the screen that allows you to revert the deletion.

6.2 Conditions

On the *Conditions* screen, you can create and manage the conditions that are used for the skills in the task analysis in LEAD.



























| No | Title | Status | Actions | Delete |
|----|----------------------------------------------------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1 | During day light | Approved |   |  |
| 2 | in all conditions | Approved |   |  |
| 3 | when provided with the relevant information | New |    |  |
| 4 | With the bicycle removed from all lanes of traffic | Approved |   |  |

Figure 86: Conditions

On the *Conditions* screen, you can:

- Add a **+ New** condition to the existing list by clicking on **+ New**.

- **Preview**  the *All Conditions* spreadsheet listing all conditions entries with all the details in LEAD for each entry.
- Select a condition and then:
 - **Preview**  the:
 - *All Conditions* spreadsheet listing all conditions entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected condition is cited or used.
 - **Replace**   one condition with another condition in the list.
Note: This will replace the condition everywhere it is used, including in approved initiatives! Hence, you will only see **Replace** , when you have the *Replace* privilege as part of your role.
 - **View**  the condition information.
 - To approve the condition, select **View**  and then select *Approve*.
Note: Conditions are automatically approved when the initiative that cites/uses the conditions is approved.
 - **Edit**  the condition information, as long as it has not been approved.
 - Select **Show History**   to review the changes made to the condition, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - **Delete**  the condition, if has not been cited in the task analysis of any initiative. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

6.3 Standards

On the *Standards* screen, you can create and manage the standards that are used for the skills in the task analysis in LEAD.

Standards

LEAD > Library > Standards

Find:





| No | Title | Status | Actions | Delete |
|----|-----------------------------------------|----------|---------|--------|
| 1 | Before 9 pm | Approved | | |
| 2 | to the satisfaction of self and command | Approved | | |
| 3 | with 80% accuracy | New | | |
| 4 | with 90% accuracy | Approved | | |
| 5 | with no errors | Approved | | |

Page size: 7 Items 1 to 5 of 5 total

Figure 87: Standards

On the *Standards* screen, you can:

- Add a standard to the existing list by clicking on + New.
- *Preview* the *All Standards* spreadsheet listing all standards entries with all the details in LEAD for each entry.
- Select a standard and then:
 - *Preview* the:
 - *All Standards* spreadsheet listing all standards entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected standard is cited or used.
 - *Replace* one standard with another standard in the list.
Note: This will replace the standard everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
 - *View* the standard information.

- To approve the standard, select *View*  and then select *Approve*.
Note: Standards are automatically approved when the initiative that cites/uses the standards is approved.
- *Edit*  the standard information, as long as it has not been approved.
- Select *Show History*  to review the changes made to the standard, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete*  the standard, if it has not been cited in the task analysis of any initiative. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

6.4 Knowledge

On the *Knowledge* screen, you can create and manage the knowledge entries that are used for the skills in the task analysis in LEAD. In LEAD, we provide you with the Department of Labor O*NET Knowledge listing, based on the Department of Labor's (DOL) Standard Occupational Classification (SOC). These knowledge entries are already approved and used on the Competencies screens, so they cannot be deleted.






The screenshot shows the LEAD Knowledge screen. The top header is orange with the LEAD logo and user name 'Bartholomew, Yvette'. A sidebar on the left lists navigation options: Home, Initiatives, Competencies, Resources, Library (selected), Verbs, Conditions, Standards, Knowledge, Skills, Abilities, Interventions, Reports, and Admin. The main content area is titled 'Knowledge' and shows a breadcrumb 'LEAD > Library > Knowledge'. Below this is a search bar with 'Find: Text to search' and a 'Search' button. A table of knowledge entries is displayed with columns: No, Title, Status, Actions, and Delete. The table contains five entries with titles like 'Administration and Management', 'Arts and Humanities', 'Bicycles and Tricycles', 'Biology', and 'Building and Construction'. The status for most is 'Approved', while 'Bicycles and Tricycles' is 'New'. At the bottom, there is a pagination bar showing 'Page size: 5' and 'Items 1 to 5 of 80 total'.

| No | Title | Status | Actions | Delete |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------|--------|
| 1 | Administration and Management - Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources. | Approved | | |
| 2 | Arts and Humanities - Knowledge of facts and principles related to the branches of learning concerned with human thought, language, and the arts. | Approved | | |
| 3 | Bicycles and Tricycles - Knowledge of materials, methods, parts, and tools involved in the construction, maintenance, or repair of bicycles, tricycles and similar non-motorized, chain-driven vehicles. | New | | |
| 4 | Biology - Knowledge of plant and animal organisms, their tissues, cells, functions, interdependencies, and interactions with each other and the environment. | Approved | | |
| 5 | Building and Construction - Knowledge of materials, methods, and the tools involved in the construction or repair of houses, buildings, or other structures such as highways and roads. | Approved | | |

Figure 88: Knowledge

On the *Knowledge* screen, you can:

- Add a **New** knowledge entry to the existing list by clicking on + New.
- **Preview** the *All Knowledge* spreadsheet listing all knowledge entries with all the details in LEAD for each entry.
- Select a knowledge entry and then:
 - **Preview** the:
 - *All Knowledge* spreadsheet listing all knowledge entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected knowledge entry is cited or used.
 - **Replace** one knowledge entry with another knowledge entry in the list.
Note: This will replace the knowledge entry everywhere it is used, including in approved initiatives! Hence, you will only see **Replace** , when you have the *Replace* privilege as part of your role.
 - **View** the knowledge entry.





- To approve the knowledge entry, select *View*  and then select *Approve*.
Note: Knowledge entries are automatically approved when the initiative that cites/uses the knowledge entries is approved.
- *Edit*  the knowledge entry, as long as it has not been approved.
- Select *Show History*   to review the changes made to the knowledge entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete*  the knowledge entry, if has not been cited in the task analysis of any initiative, or for a competency entry. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.



6.5 Skills





On the *Skills* screen, you can create and manage the skill entries that are used for the skills in the task analysis in LEAD. In LEAD, we provide you with the Department of Labor O*NET Skills listing, based on the Department of Labor's (DOL) Standard Occupational Classification (SOC). These skill entries are already approved and used on the Competencies screens, so they cannot be deleted.

Figure 89: Skills

On the *Skills* screen, you can:

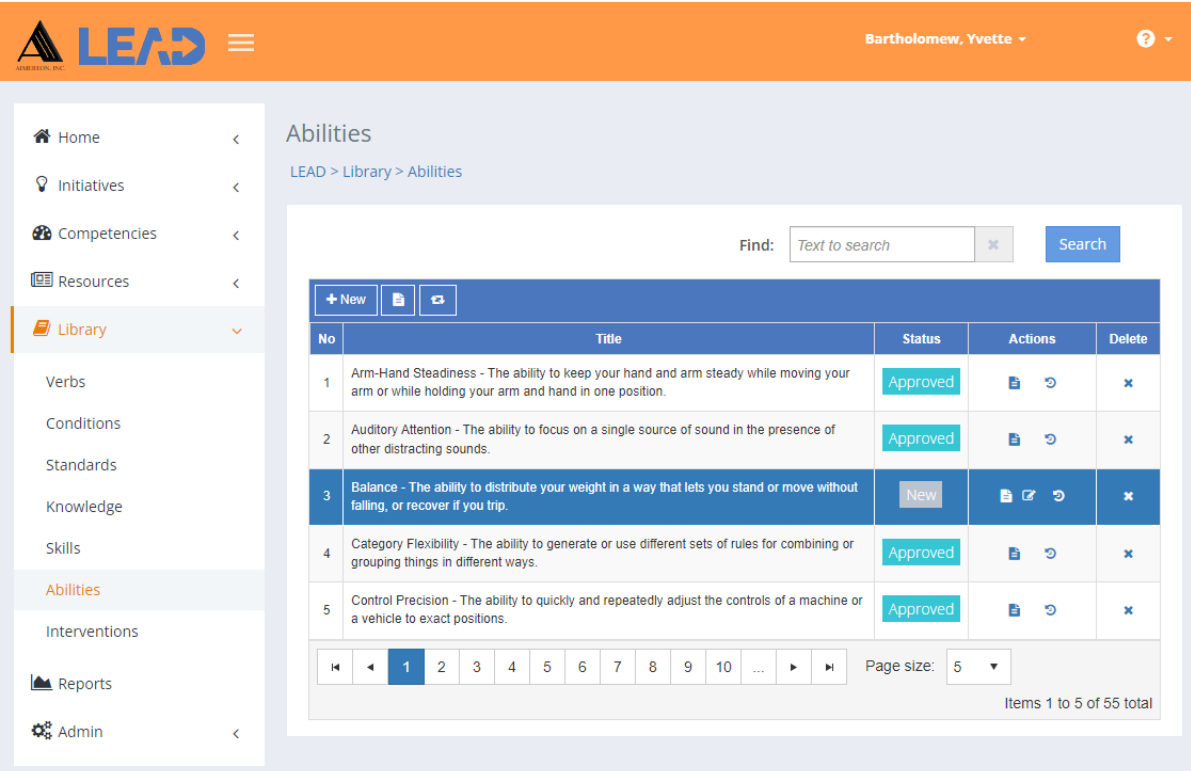
- Add a  skill entry to the existing list by clicking on + *New*.
- *Preview*  the *All Skills* spreadsheet listing all skills entries with all the details in LEAD for each entry.
- Select a skill entry and then:
 - *Preview*  the:
 - *All Skills* spreadsheet listing all skill entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected skill is cited or used.
 - *Replace*  one skill with another skill in the list.

Note: This will replace the skill everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
 - *View*  the skill entry.

















- To approve the skill, select *View*  and then select *Approve*.
Note: Skills are automatically approved when the initiative that cites/uses the skills is approved.
- *Edit*  the skill entry, as long as it has not been approved.
- Select *Show History*  to review the changes made to the skill entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete*  the skill entry, if has not been cited in the task analysis of any initiative. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

6.6 Abilities

On the *Abilities* screen, you can create and manage the ability entries that are used for the skills in the task analysis in LEAD. In LEAD, we provide you with the Department of Labor O*NET Abilities listing, based on the Department of Labor's (DOL) Standard Occupational Classification (SOC). These ability entries are already approved and used on the Competencies screens, so they cannot be deleted.













The screenshot shows the LEAD application interface. The top navigation bar is orange with the LEAD logo and a user profile for Bartholomew, Yvette. The left sidebar contains a menu with options: Home, Initiatives, Competencies, Resources, Library (selected), Verbs, Conditions, Standards, Knowledge, Skills, Abilities, Interventions, Reports, and Admin. The main content area is titled 'Abilities' and shows a breadcrumb 'LEAD > Library > Abilities'. Below the title is a search bar with the text 'Find: Text to search' and a 'Search' button. A table of abilities is displayed with the following data:

| No | Title | Status | Actions | Delete |
|----|----------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1 | Arm-Hand Steadiness - The ability to keep your hand and arm steady while moving your arm or while holding your arm and hand in one position. | Approved |   |  |
| 2 | Auditory Attention - The ability to focus on a single source of sound in the presence of other distracting sounds. | Approved |   |  |
| 3 | Balance - The ability to distribute your weight in a way that lets you stand or move without falling, or recover if you trip. | New |    |  |
| 4 | Category Flexibility - The ability to generate or use different sets of rules for combining or grouping things in different ways. | Approved |   |  |
| 5 | Control Precision - The ability to quickly and repeatedly adjust the controls of a machine or a vehicle to exact positions. | Approved |   |  |

At the bottom of the table, there is a pagination bar showing 'Page size: 5' and 'Items 1 to 5 of 55 total'.

Figure 90: Abilities

On the *Abilities* screen, you can:

- Add a  **New** ability entry to the existing list by clicking on + *New*.
- *Preview*  the *All Abilities* spreadsheet listing all abilities entries with all the details in LEAD for each entry.
- Select an ability entry and then:
 - *Preview*  the:
 - *All Abilities* spreadsheet listing all abilities entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected ability is cited or used.
 - *Replace*  ²⁰⁹ one ability with another ability in the list.
Note: This will replace the ability everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
 - *View*  the ability entry.
 - To approve the ability entry, select *View*  and then select *Approve*.
Note: Abilities are automatically approved when the initiative that cites/uses the abilities is approved.
 - *Edit*  the ability entry, as long as it has not been approved.
 - Select *Show History*  ²¹⁰ to review the changes made to the ability entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - *Delete*  the ability entry, if has not been cited in the task analysis of any initiative.
Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

6.7 Interventions

On the *Interventions* screen, you can create and manage the existing interventions that are used for the skills in the task analysis in LEAD.

LEAD > Library > Interventions

Find:






| No | Type | Intervention | Status | Actions | Delete |
|----|----------------------|------------------------|----------|---------|--------|
| 1 | Facilitated Workshop | Being a bike mechanic | Approved | | |
| 2 | Facilitated Workshop | Traffic Training | New | | |
| 3 | On-the-job Training | Bike Repair Mentorship | Approved | | |

Page size: 10 Items 1 to 3 of 3 total

Figure 91: Interventions

On the *Interventions* screen, you can:

- Add a **New** intervention to the existing list by clicking on + *New*.
- *Preview* the *All Interventions* spreadsheet listing all interventions entries with all the details in LEAD for each entry.
- Select an intervention and then:
 - *Preview* the:
 - *All Interventions* spreadsheet listing all intervention entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected intervention is cited or used.
 - *Replace* ²⁰⁹ one intervention with another intervention in the list.
Note: This will replace the intervention everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
 - *View* the intervention information.


- To approve the intervention entry, select *View*  and then select *Approve*.
Note: Interventions are automatically approved when the initiative that cites/uses the interventions is approved.
- *Edit*  the intervention information, as long as it has not been approved.
- Select *Show History*   to review the changes made to the intervention, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete*  the intervention, if has not been cited in the task analysis of any initiative.
Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

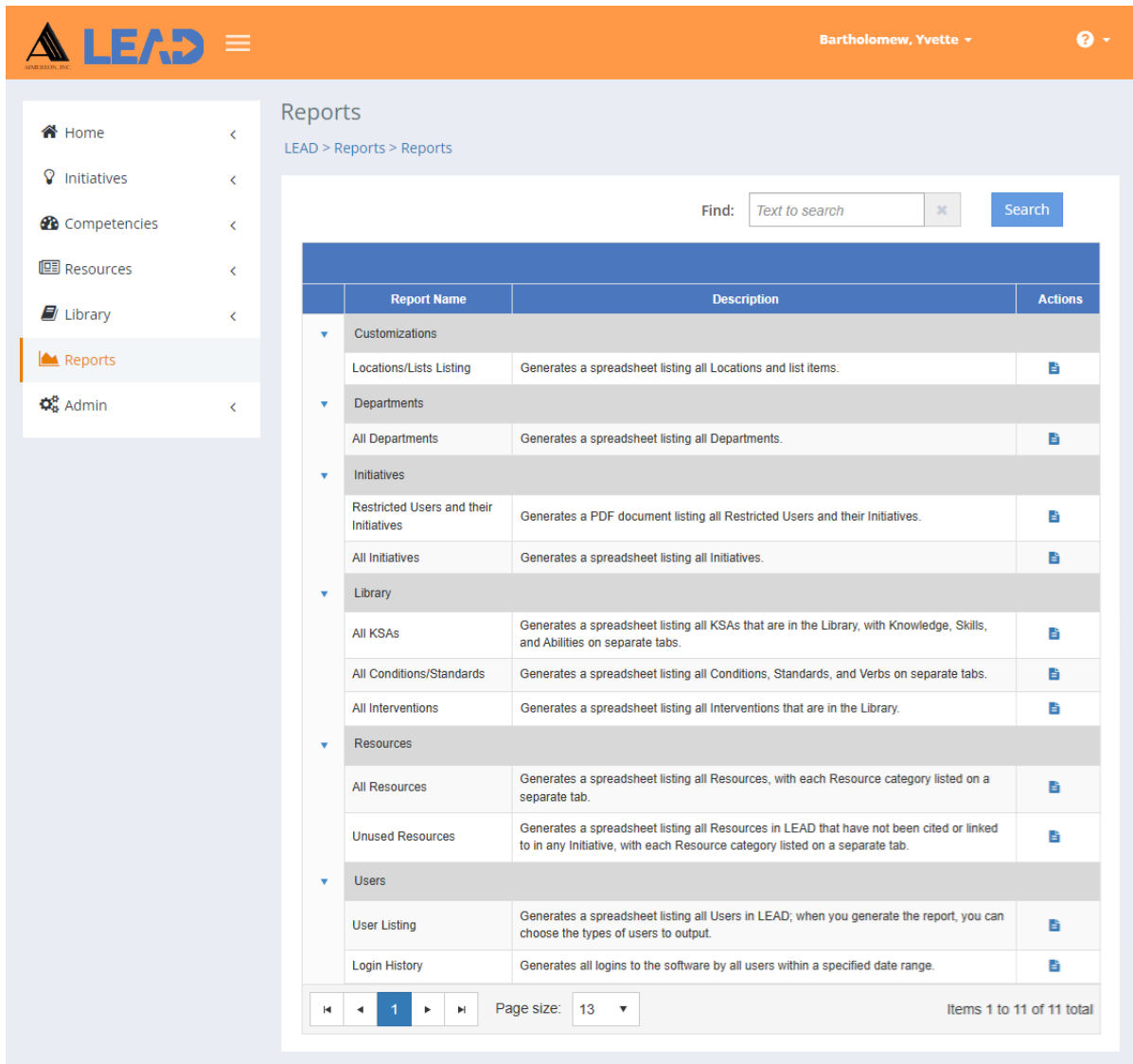


Reports

This chapter describes how to generate the reports available in LEAD.

7 Reports












On the *Reports* screen, you can create outputs from LEAD that are not tied to specific initiatives. Simply find the report you would like to generate. Select it in the list and select *View* . If a report has options, they will show in a pop-up window for you to select as desired.



Reports

LEAD > Reports > Reports

Find:

| | Report Name | Description | Actions |
|---|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| ▼ | Customizations | | |
| | Locations/Lists Listing | Generates a spreadsheet listing all Locations and list items. |  |
| ▼ | Departments | | |
| | All Departments | Generates a spreadsheet listing all Departments. |  |
| ▼ | Initiatives | | |
| | Restricted Users and their Initiatives | Generates a PDF document listing all Restricted Users and their Initiatives. |  |
| | All Initiatives | Generates a spreadsheet listing all Initiatives. |  |
| ▼ | Library | | |
| | All KSAs | Generates a spreadsheet listing all KSAs that are in the Library, with Knowledge, Skills, and Abilities on separate tabs. |  |
| | All Conditions/Standards | Generates a spreadsheet listing all Conditions, Standards, and Verbs on separate tabs. |  |
| | All Interventions | Generates a spreadsheet listing all Interventions that are in the Library. |  |
| ▼ | Resources | | |
| | All Resources | Generates a spreadsheet listing all Resources, with each Resource category listed on a separate tab. |  |
| | Unused Resources | Generates a spreadsheet listing all Resources in LEAD that have not been cited or linked to in any Initiative, with each Resource category listed on a separate tab. |  |
| ▼ | Users | | |
| | User Listing | Generates a spreadsheet listing all Users in LEAD; when you generate the report, you can choose the types of users to output. |  |
| | Login History | Generates all logins to the software by all users within a specified date range. |  |

Page size: 13

Figure 92: Reports

The following reports are available:

- In the *Customizations* group:
 - *Locations/Lists Listing* - a spreadsheet listing all initiative locations and all items found under Customizations > Lists, each on their own tabs.

- In the *Departments* group:
 - *All Departments* - a spreadsheet listing all departments.
- In the *Initiatives* group:
 - *Restricted Users and their Initiatives* - a PDF document listing all restricted users and the initiatives they are assigned to on the *Team Member* screen.
 - *All Initiatives* - a spreadsheet listing all initiatives, grouped by *Departments* and *My Initiatives*, along with the *Initiative State*, *Start* and *End Date* information.
- In the *Library* group:
 - *All KSAs* - a spreadsheet listing all KSAs that are in the *Library*, with *Knowledge*, *Skills*, and *Abilities* each on their own tabs.
 - *All Conditions/Standards* - a spreadsheet listing all *Conditions*, *Standards*, and *Verbs* on separate tabs.
 - *All Interventions* - a spreadsheet listing all *Interventions* that are in the *Library*.
- In the *Resources* group:
 - *All Resources* - a spreadsheet listing all resources in LEAD along with their information, with each resource category (*Consumables*, *IETMs*, *IMM*, *Publications*, *Software*, and *Tools/Equipment*) listed on a separate tab.
 - *Unused Resources* - a spreadsheet listing all resources in LEAD that have not been cited or linked to in any initiative, with each resource category (*Consumables*, *IETMs*, *IMM*, *Publications*, *Software*, and *Tools/Equipment*) listed on a separate tab; this allows users to identify any resources that are not in use for possible deletion.
- In the *Users* group:
 - *User Listing* - a spreadsheet listing all users in LEAD.
 - *Login History* - a spreadsheet listing all LEAD logins within a specified date range.

This page is intentionally left blank.



Admin

This chapter describes the administrative options available in LEAD.




8 Admin

On the *Admin* screens, you can set up and manage the following:

- [Announcements](#)¹⁹⁶ - create and manage the announcements that show on the login screen.
- [Departments](#)¹⁹⁷ - create and manage the departments in LEAD.
- [Initiative Locations](#)¹⁹⁹ - create and manage the learning event initiative locations for use in initiatives.
- [Users](#)²⁰⁰ - create and manage the users that have access to LEAD.
- [Roles](#)²⁰¹ - create and manage the roles that determine the privileges users have in LEAD.
- [System Logs](#)²⁰² - review and delete system logs.
- [In-Use](#)²⁰³ - review and reset in-use data.
- [Licensing](#)²⁰⁴ - create and manage LEAD licenses.

8.1 Announcements

On the *Announcements* screen, you can create and manage the announcements that show on the login screen and on the *Announcements* screen that you can access by selecting the *Announcement* icon that displays between your user name and the help icon in the header bar. Once you've reviewed the announcements, you can close the pop-up. There are three types of *Announcement* icons:

-  - this icon displays when there are active announcements to view.
-  - this icon displays when there are unread/new announcements to view.
-  - this icon displays whenever there is a problem with the license for LEAD.

LEAD Admin

Bartholomew, Yvette

Announcements

LEAD > Admin > Announcements

Find: Search

+ New

| No | Subject | Creation Date | Expiration Date | Actions | Delete |
|----|----------------|------------------------|-----------------|---------|--------|
| 1 | New Test Items | 09/25/2021 06:49:26 AM | 01/22/2022 | | |
| 2 | Happy July! | 07/09/2022 06:24:10 AM | 07/13/2022 | | |
| 3 | Happy August! | 08/02/2022 11:04:38 AM | 08/05/2022 | | |

Page size: 7 Items 1 to 3 of 3 total

Figure 93: Announcements

On the *Announcements* screen>, you can:

- Add a **+ New** announcement to the existing list by clicking on + New.
- Select an announcement and then:
 - View the announcement information.
 - Edit the announcement information.
 - Select Show History to review the changes made to the announcement, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - Delete the announcement. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

8.2 Departments

On the *Departments* screen, you can create and manage the departments that are used in LEAD.

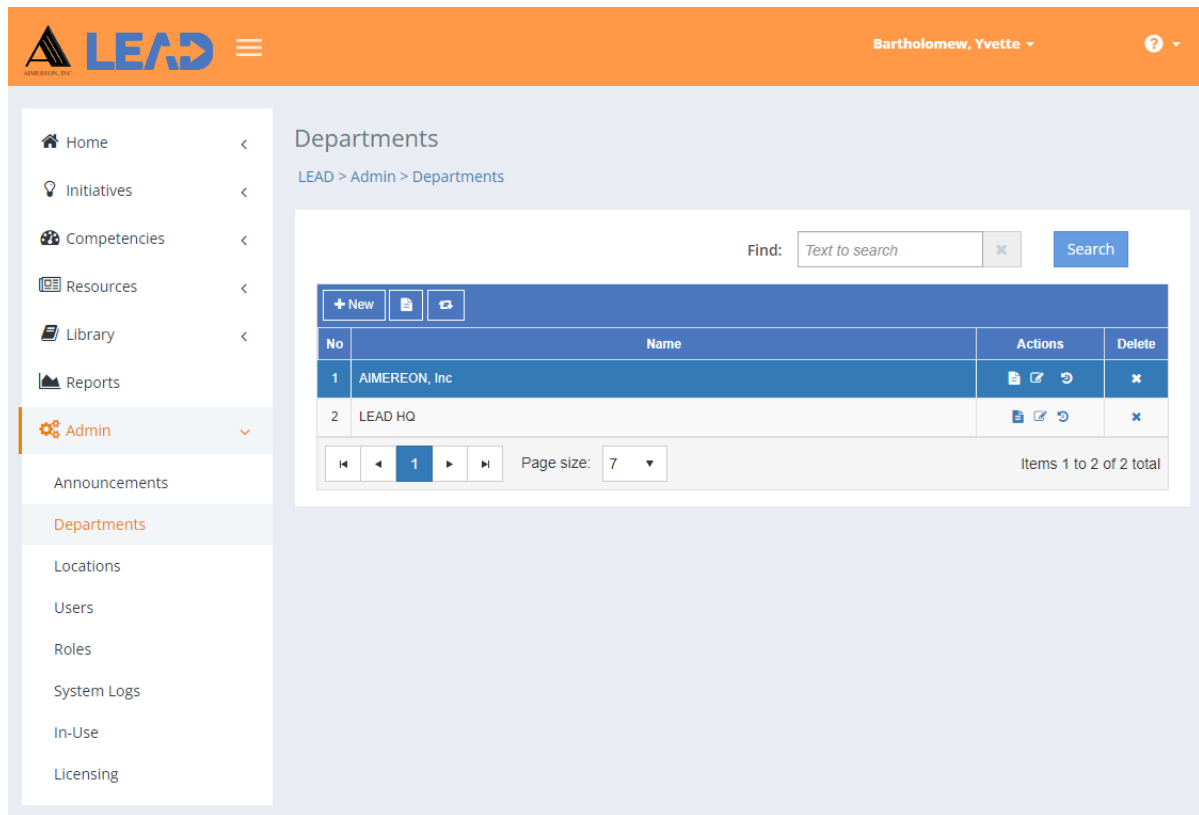











Figure 94: Departments

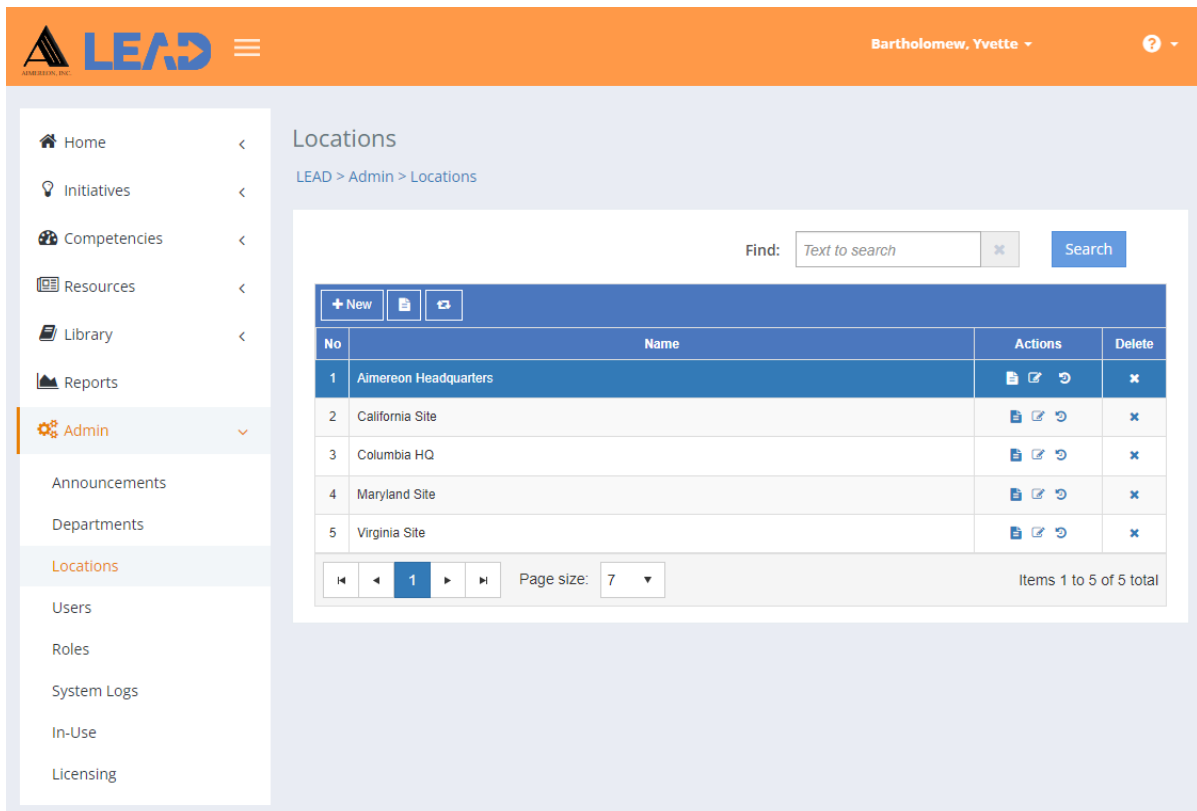
On the *Departments* screen, you can:

- Add a  department to the existing list by clicking on + *New*.
- *Preview*  the *All Departments Report* that lists all departments with all the details in LEAD for each department.
- Select a department and then:
 - *Preview*  the:
 - *All Departments Report* that lists all departments with all the details in LEAD for each department.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected department is cited or used.
 - *Replace*  one department with another department in the list.
Note: This will replace the department everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
 - *View*  the department information.

- *Edit*  the department information.
- Select *Show History*  to review the changes made to the department, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete*  the department, if has not been cited anywhere (particularly in initiatives). Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

8.3 Locations

On the *Locations* screen, you can create and manage the locations that you can select from when you add the initiative location to the TNA or TMD of the initiatives.


































| No | Name | Actions | Delete |
|----|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1 | Aimereon Headquarters |    |  |
| 2 | California Site |    |  |
| 3 | Columbia HQ |    |  |
| 4 | Maryland Site |    |  |
| 5 | Virginia Site |    |  |

Figure 95: Locations








On the *Locations* screen, you can:



- Add a  location to the existing list by clicking on + *New*.
- *Preview*  the *All Locations Report* that lists all locations with all the details in LEAD for each locations.

- Select a location and then:
 - *Preview*  the:
 - *All Locations Report* that lists all locations with all the details in LEAD for each locations.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected department is cited or used.
 - *Replace*   one location with another location in the list.
Note: This will replace the location everywhere it is used, including in approved initiatives! Hence, you will only see *Replace* , when you have the *Replace* privilege as part of your role.
 - *View*  the location information.
 - *Edit*  the location information.
 - Select *Show History*   to review the changes made to the location, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - *Delete*  the location, if has not been cited in any initiative. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

8.4 Users

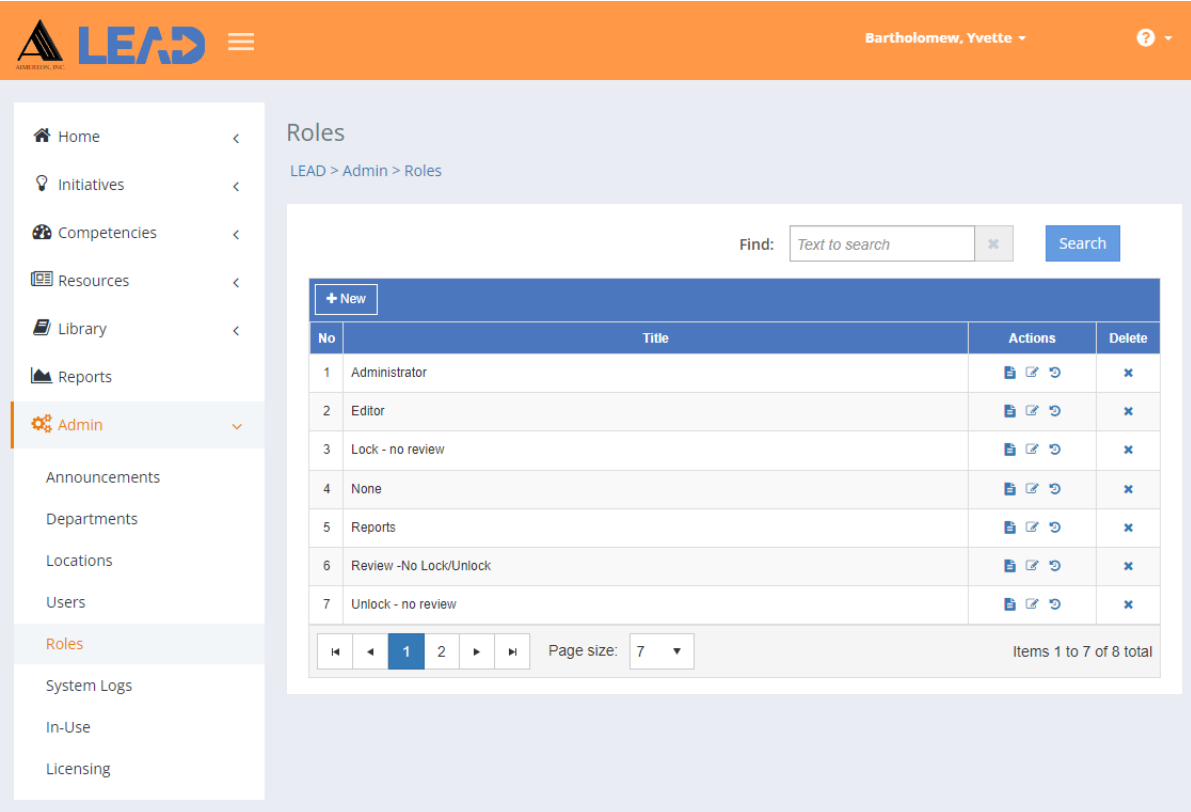
On the *Users* screen, you can create and manage the users in LEAD. Use *Filter* drop-down to narrow down the list of users displayed. Depending on the *Filter* selected, you can perform different actions on the users listed, including creating new users or deleting them. When you select a user on this screen, you can:

- Make the user *Active*  or *Inactive* .
- Create a *Copy*  of a user with all information copied, except for the *Information*, *Administrative*, and *Preferences* tabs.
- View the *Login History*  of the user.
- *Change the Password*  of the user.
- *View*  the user information.
- *Edit*  the user information.

- Select [Show History](#)   to review the changes made to the user, including the user name and date/time of saved changes, and revert to an earlier saved revision.

8.5 Roles

On the *Roles* screen, you can create and manage the roles that give users their primary privileges in LEAD. A user is assigned a role on the *User* screen. Initiatives have their own privileges that you can set for each user.



The screenshot displays the LEAD Roles management interface. The sidebar on the left contains navigation links: Home, Initiatives, Competencies, Resources, Library, Reports, Admin, Roles (highlighted), System Logs, In-Use, and Licensing. The main content area is titled 'Roles' and includes a breadcrumb 'LEAD > Admin > Roles'. A search bar with the placeholder 'Text to search' and a 'Search' button is present. Below the search bar is a '+ New' button and a table of roles. The table has four columns: 'No', 'Title', 'Actions', and 'Delete'. It lists 7 roles: 1 Administrator, 2 Editor, 3 Lock - no review, 4 None, 5 Reports, 6 Review -No Lock/Unlock, and 7 Unlock - no review. Each role has icons for view, edit, and history, and a delete icon. At the bottom, there is a pagination control showing page 1 of 7 and a page size of 7.

































| No | Title | Actions | Delete |
|----|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1 | Administrator |    |  |
| 2 | Editor |    |  |
| 3 | Lock - no review |    |  |
| 4 | None |    |  |
| 5 | Reports |    |  |
| 6 | Review -No Lock/Unlock |    |  |
| 7 | Unlock - no review |    |  |

Figure 96: Roles

On the *Roles* screen, you can:

- Add a [+ New](#) role to the existing list by clicking on + New.
- Select a role and then:
 - View  the role information.
 - Edit  the role information.
 - Select [Show History](#)   to review the changes made to the role, including the user name and date/time of saved changes, and revert to an earlier saved revision.

- *Delete* ✕ the role. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

Note on Customizer: The *Customizer* role that you can assign on the *Users* screen is a LEAD system role, which cannot be edited. Likewise, you cannot add privileges for the *Customizations* screens on the *Roles* screen, as those can only be accessed with the *Customizer* role. Users assigned the *Customizer* role do not count towards the licensed number of users, regardless of license type.

Note on Reviewer: The *Reviewer* role that you can assign on the *Users* screen is another LEAD system role, which cannot be edited. Users with the *Reviewer* role have *View* and *Generate* privileges on the *Initiatives*, *Competencies*, *Resources*, *Library*, and *Reports* tabs. Users assigned the *Reviewer* role count towards the licensed number of *Reviewers* (if a *Reviewer* license is available) or *Full* licenses (if no *Reviewer* license is available).

Note on Review Privilege: The *Review* privilege that you can assign to a role you create, allows someone to edit the initiative, when (and only when) that initiative is in *Lock for Review* status.

8.6 System Logs

On the *System Logs* screen, you can review, export, and delete system logs that are automatically generated when a change is made to a user, or when a problem occurs in LEAD. You need the *System Logs* privilege assigned to your role to see the *System Logs* entry under the *Admin* tab. Whenever you get an error message in LEAD, that error message, along with the detailed *Stack Trace* information, is saved in the system logs. This enables you to forward the full error information to the LEAD support team to find a resolution.

System Logs

LEAD > Admin > System Logs

Find:

| No | Creation Date | Message | Actions |
|----|------------------------|-----------------------------------------------------------------------------------------------------------------------|---------|
| 1 | 10/21/2022 11:14:51 AM | Invalid value for parameter Parameter name: int_value | |
| 2 | 10/10/2022 12:01:30 PM | Thread was being aborted. | |
| 3 | 10/03/2022 01:59:23 PM | String was not recognized as a valid DateTime. | |
| 4 | 09/28/2022 03:30:54 PM | Bartholomew, Isabel modified the user account for Bartholomew, Isabel. | |
| 5 | 09/28/2022 03:27:02 PM | String was not recognized as a valid DateTime. | |
| 6 | 09/20/2022 11:03:28 AM | Unable to connect to the database: [Provider=Microsoft.Jet.OLEDB.4.0;Data Source=C:\Windows\TEMP\tmp0000038\rlo.mdb;] | |
| 7 | 09/20/2022 11:03:28 AM | Could not find file 'C:\Windows\TEMP\tmp0000038\rlo.mdb'. | |

Page size: 7
Items 1 to 7 of 116 total

Figure 97: System Logs

On this screen you can:

- **Export** /generate all system log entries to a spreadsheet for off-line review.
- **Delete** system log entries.
- Select a system log entry and **View** the system log information.

8.7 In-Use

On the *In-Use* screen, you can review and reset in-use data that may be preventing you or another user from editing something in LEAD. Whenever you open an item in LEAD for editing, that item is set to be in-use or locked, meaning other users cannot simultaneously edit the same item. However, there are times when an item is locked when no one is actually editing the item, i.e., the system hiccupped and didn't unlock the item, when it should have.

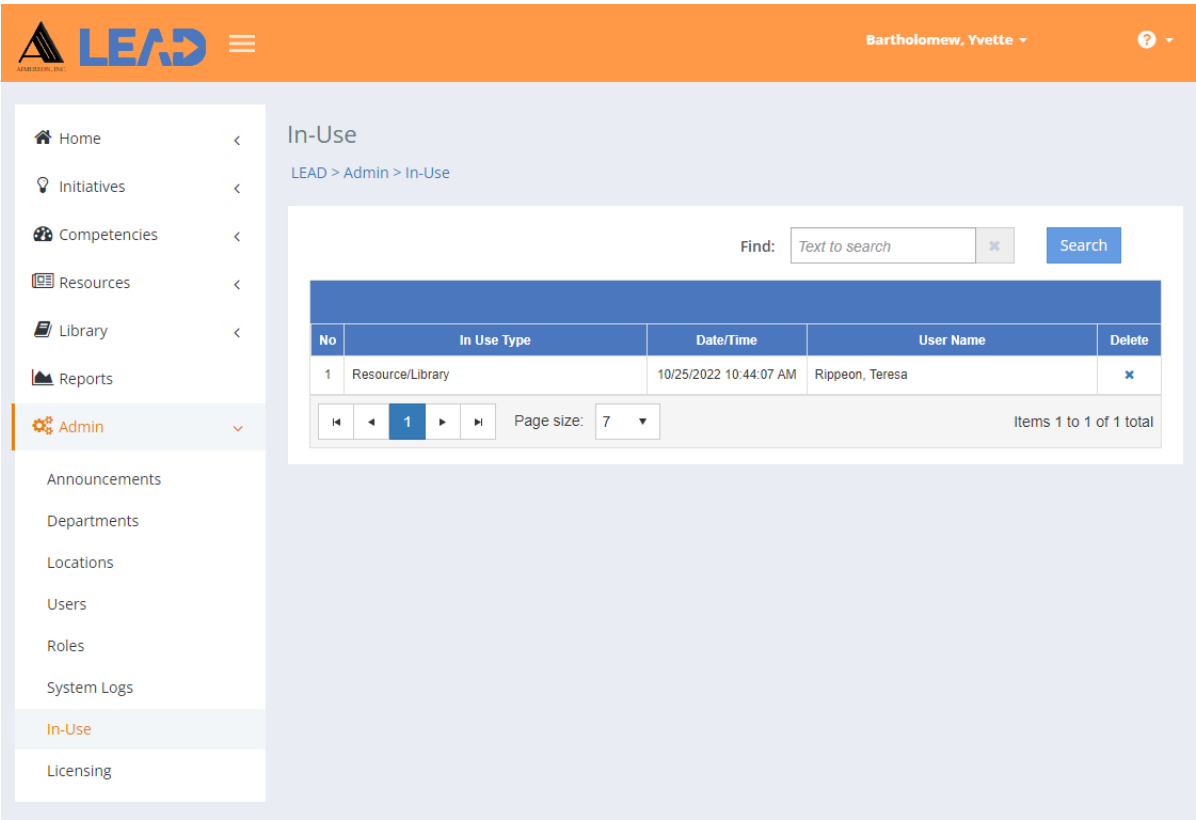


Figure 98: In-Use

8.8 Licenses

On the *Licensing* screen, you can review your existing license for LEAD and add a new license when needed.

LEAD Admin

Bartholomew, Yvette

Home < Initiatives < Competencies < Resources < Library < Reports < **Admin** > Licenses

Licenses

LEAD > Admin > Licenses

[+ New](#)

| No | Start Date | End Date | Number Of Users | Features | Actions | Delete |
|----|------------|------------|-----------------|----------|---------|--------|
| 1 | 04/01/2021 | 06/30/2021 | 50 | | | |
| 2 | 07/14/2018 | 09/14/2028 | 100 | | | |

Page size: 7 Items 1 to 2 of 2 total

Figure 99: Licensing

On the *Licensing* screen, you can:

- Add a new license to the existing list by clicking on [+ New](#), entering the *License Code* provided by Aimereon, Inc., and selecting *Save*.
- Select a license and then:
 - View the license information.
 - Select [Show History](#) to review the changes to the license, including the user name and date/time when it was saved.
 - Delete the license.

You can click on the column headers of the table to sort the licenses by that column. Clicking on a column header again will reverse the sort. Clicking on the column header a third time will remove the sort. Small arrows in the column header let you know which way the data is currently sorted.

This page is intentionally left blank.



Common Actions

9 Common Actions



Some of the things you may do frequently and across multiple areas of LEAD are:

- [Output Options](#)²⁰⁸ when selecting the *Preview* icon on various screens.
- [Reviewing the History](#)²¹⁰ of an item and possibly reverting to an earlier revision/saved version of that item.
- [Resequencing Items](#)²⁰⁹ on the screen, including item that are in a tree structure.
- [Selecting Resources](#)²¹¹ for the TNA, TMD, and skills.
- [Using the Text Editor](#)²¹².
- [Working with Business Rules](#)²¹⁸.
- [Working with Flags](#)²²⁰.

9.1 Output Options



The *Output Options* screen will display when you select *Preview* in the following places:

- *Resource Management* under the *Initiative Management* folder on the *Analysis* and *Design* tabs and *Cited Resources* screens on the *Develop* tab.
- *TNA or Skill Hierarchy* on the *Analysis* or *Implement* tab, or the *TMD, Testing Plan, TDD, or Training Outline* on the *Design* or *Implement* tab.
- *TNA and TMD Resources* screens under the *Training Data* and *Initiative Locations* folders.
- *Develop* tab, when selecting:
 - An individual Table of Contents item
 - A *Sheet*
 - An *Assessment Object*
 - The *Instructor Guide, Participant Guide, or Storyboard* options under the *Documents* folder
- *Implement* tab, when generating the *Assessment Package, Instructor Guide, Participant Guide*, or packages that contain the IG, PG, or both.
- *Implement* tab, when generating the *All Comments* report.
- *Library* screens.
- *Resources* screens.



- *Login History* report on the [Reports](#)  ¹⁹² tab.
- *User Listing* report on the [Reports](#)  ¹⁹² tab.

The *Output Options* screen may allow you to select the *Document* you wish to generate, and may also give you additional options for your output.

9.2 Resequencing Items

Any time you see *Resequencing*  or , you can change the order of the items underneath the selected item. When you select *Resequencing*, you see a list of items that you can resequence (change the order of) simply by clicking and dragging individual items in the order they should appear.

Resequencing

Drag/drop the rows to place the items in the desired order.

[Always Sort Alphabetically](#)

| Seq | Text |
|-----|----------------------------------------------------------------------------------------|
| 1 | Apply principles, techniques, procedures, and equipment to routine bicycle maintenance |
| 2 | Install tires and tubes |
| 3 | Repair holes in tire tubes |

Save



Cancel


Figure 100: Resequencing Screen - Skills Example

You can also use the *Always Sort Alphabetically* link to automatically sort all entries in alphabetical order when that link is on the screen.

Once you've sorted everything to your satisfaction, select *Save* to save the changes. Selecting *Cancel* will revert back to the previous order.

9.3 Replacing Resources, Library Items, Departments, Locations, Customization List Items

Any time you see *Replace* , you can replace one item with another item in the list (select an item and then *Replace*  to display the *Replacement* screen). When you save on the *Replacement* screen, the *Replace* item will be replaced with the *Replace With* item everywhere in LEAD. This includes approved initiatives!

Note: You will only see *Replace* , when you have the *Replace* privilege as part of your role.


Skill Replacement ? ×

Replacement

Select an item from the list below to replace the selected item.


Replace:

Critical Thinking — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.








Replace With:

Critical Thinking - Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.



Find: × Search

| No | Title | Actions |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| 6 | Critical Thinking - Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems. |  |
| 7 | Equipment Maintenance - Performing routine maintenance on equipment and determining when and what kind of maintenance is needed. |  |
| 8 | Equipment Selection - Determining the kind of tools and equipment needed to do a job. |  |
| 9 | Installation - Installing equipment, machines, wiring, or programs to meet specifications. |  |
| 10 | Instructing - Teaching others how to do something. |  |

◀ 1 2 3 4 5 6 7 8 ▶




Page size: 5 ▼

Items 6 to 10 of 37 total



Save Cancel

Figure 101: Replacement Screen

On the *Replacement* screen, you can:

- Select **View**  to view the full information about a selected [Resource](#) ¹⁶², [Library](#) ¹⁷⁸ item, [Department](#) ¹⁹⁷, [Location](#) ¹⁹⁹, or [Customizations > List](#) ²²⁷ item.
- Select **Replace**  to add an item to the *Replace With* field on the screen.
- Select **Switch**  to change the positions of the items listed under *Replace* and *Replace With*.
- Use the *Find:* field to *Search* for items that match your search term. The table will list all items that contain your search term on the screen. Select × to clear the search term and view all items again.

9.4 Reviewing and Reverting History




Any time you see *Show History*  or , you can review the save history for the selected item.

LEAD Documentation

COMPANY PROPRIETARY



©2024 Aimereon

Revision Selection ? ×

| Revision | | | | |
|----------|---------------------|----------|------------------------|-------------------------------------------------------------------------------------|
| Seq | User Name | Action | Date/Time | |
| 3 | Bartholomew, Yvette | Modified | 08/24/2022 08:57:27 AM |  |
| 2 | Bartholomew, Yvette | Modified | 08/24/2022 08:56:00 AM |  |
| 1 | Bartholomew, Yvette | Created | 08/15/2022 11:29:34 AM |  |

*Field is required

Figure 102: Revision Selection Screen








Each row in the table lists a saved revision of the item, along with the user name that saved the change, and the date and time the change was saved. Selecting a row and then **View**  will display that saved revision on the bottom of the screen, so you can review it. **Revert**  allows you to go back to that saved revision. You will only see *Revert*, if the item is not approved, and if you have the privileges to edit the item.

9.5 Selecting Resources for the TPP, TCCD, and Skills

On the *Resource Selection* screen:

Resource Selection ? ×

Type: Consumables Find: Text to search × Search



| + New | | | | |
|-------|----|-------------------------------------|-------------------------------------------------|---------------------------------------------------------------------------------------|
| | No | Sel | Resource Name | View |
| ▶ | 1 | <input checked="" type="checkbox"/> | Consumable: Bicycle Tube Patch, 1-423-09570-392 |  |
| ▶ | 2 | <input checked="" type="checkbox"/> | Consumable: Rubber Cement, 12.35.1248.2A |  |
| ▶ | 3 | <input checked="" type="checkbox"/> | Consumable: Scraper, 1.552.141425.62 |  |
| ▶ | 4 | <input type="checkbox"/> | Butterfly Patch, v2 |  |
| | 5 | <input type="checkbox"/> | Chart Pack |  |
| | 6 | <input type="checkbox"/> | Current Basic Pay Table |  |
| | 7 | <input type="checkbox"/> | Dry Erase Markers |  |

◀ 1 2 ▶ Page size: 7 Items 1 to 7 of 13 total

OK Cancel

Figure 103: Resource Selection Screen for the TNA, TMD, and Skills

- Currently selected resources are listed at the start of the list.



- Use the *Type* drop-down and the *Find* field to search for the resources to add.
- View the different versions of a resource by clicking on the arrow ► in the first column.
- Select  **New** to create a new resource based on the current selected *Type: Consumables, IETMs, IMM, Publications, Software, or Tools/Equipment*.
 - Complete the fields of the new resource.
 - Select *Save* to keep the new resource. The newly created resource is shown as selected at the top of the list.
 - Select *Cancel* to return to the selection screen.
- Select *View*  to view the resource information.
- Put a checkmark next to the resource(s) you wish to select (or unselect). You can select or unselect multiple resources and resource types at a time.
- Select *OK* to save the selected resources, select *Cancel* to return to the previous screen. Remember, you still have to save on that screen, selecting *OK* merely confirms your resource selection.








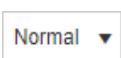
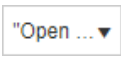

9.6 Using the Text Editor

You can use the icons and drop-downs of the text editor to manage how your content appears, whether on-screen or in printed materials. Depending on your privilege level to a certain area you may have three views available to you (buttons on the bottom of the text area), if you do not see three buttons, then you do not have the privilege level required to use the HTML or Preview views:

- *Design* - the default view, with active icons depending on what you have selected.
- *HTML* - for advanced users that want or need to tweak the output.
- *Preview* - to preview the end result.

In LEAD, you have the following options available:

| Icon | Description | Shortcut |
|-------------------------------------------------------------------------------------|---------------------------------------------|----------|
|  | Applies bold formatting to selected text. | Ctrl+B |
|  | Applies italic formatting to selected text. | Ctrl+I |

| | | |
|------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|--------|
|  | Applies underline formatting to selected text. | Ctrl+U |
|  | Applies strike-through formatting to selected text. | |
|  | Converts the selected text to upper case, preserving the non-text elements such as images and tables. | |
|  | Converts the selected text to lower case, preserving the non-text elements such as images and tables. | |
|  | Aligns the selected paragraph to the left. | |
|  | Aligns the selected paragraph to the center. | |
|  | Aligns the selected paragraph to the right. | |
|  | Sets the paragraph style. | |
|  | Sets the font typeface. | |
|  | Sets the font size. You can set the default font size on the Customizations > Configuration ²⁴⁵ screen. | |

Note: The default font size is *Size 2* on the drop-down. Changing the font size to *Size 1* and saving the change, resets the selected text to the default font size (even though you can see the smaller text on screen prior to saving).

You can force smaller font sizes by:

- Selecting the text.
- Selecting font size 3 from the Font Size drop-down.
- Selecting the HTML tab and changing the font size to 9px or smaller.

Note: Any font size between 10px and 12px resets to the default automatically when you save the text.

Font sizes 3 to 7 are the same, regardless of the default font size that was set up on the *Configuration* screen. For easy reference, here are the comparative font sizes for each font size:

- 1 - resets to default font size on save.

- 2 - default font size - shows as 13px on the HTML tab regardless of the default font size.
- 3 - shows as 16px on the HTML tab - about 13 pt.
- 4 - shows as 18px on the HTML tab - about 14 pt.
- 5 - shows as 24px on the HTML tab - about 18 pt.
- 6 - shows as 32px on the HTML tab - about 24 pt.
- 7 - shows as 48px on the HTML tab - about 36 pt.



Cuts the selected content and copies it to the clipboard.

Ctrl+X



Copies the selected content to the clipboard.

Ctrl+C



Pastes the copied content from the clipboard into the editor.

Ctrl+V



Pastes the copied content from the clipboard into the editor using one of the following options:

- *Paste from Word* - Pastes content copied from Word and removes the web-unfriendly tags.
- *Paste from Word, strip font* - cleans all Word-specific tags and removes font names and text sizes.
- *Paste Plain Text* - Pastes plain text (no formatting) into the editor.
- *Paste as HTML* - Pastes HTML code in the content area and keeps all the HTML tags.
- *Paste HTML* - Pastes HTML content in to the editor.



Indents paragraphs to the right.



Indents paragraphs to the left.



Creates a bulleted list from the selected text.



Creates a numbered list from the selected text.

If you wish to change the type of list, first create your list, then select `</> HTML` below the text editor and change the `` code to:

- `<ol type="A">` for capital letters (A, B, C, etc.).
- `<ol type="a">` for lower case letters (a, b, c, etc.).
- `<ol type="I">` for capital roman numbers (I, II, III, etc.).
- `<ol type="i">` for lower case roman numbers (i, ii, iii, etc.).

Select *Design* below the text editor to see the results.

If you wish to stop and start your list, create your lists first, then select `</>` *HTML* below the text editor and change the `` code for the lists you want to continue counting to:

`<ol start="X">` where X is the number to start the list with (in the case of a letter list, use the number represented by the letter).

For example, if you want to start the list with 3, then it would state: `<ol start="3">`

Note: When you continue numbering, it may be easier to add the desired starting number in your text until you update the HTML code. Once you've verified that everything is OK, then you can delete that number from your text. The number makes it easier to find the text in the HTML code view.

Also, the text editor may change some of the HTML code, after you save it. So it may not look the same, but it should still work as expected.



Undoes the last action. Selecting the drop-down allows you to pick how many actions to undo.

Ctrl+Z



Redoes/Repeats the last action, which you just undid. Selecting the drop-down allows you to pick how many actions to redo.

Ctrl+Y



Format Painter allows you to:

- Copy the format of selected text.
- Apply the copied format to other text.
- Clear the format of selected text.



Changes the color of the selected text (the foreground).



Changes the background color of the selected text.



Opens the *Table* options:

- Select number of rows and columns and insert a table of that size.
- *Table Wizard* link has more options to configure a table.
- *Insert Row Above* - inserts a row above the selected row.
- *Insert Row Below* - inserts a row below the selected row.
- *Delete Row* - deletes the current selected row.
- *Insert Column to the Left* - inserts a column to the left of the selected column.
- *Insert Column to the Right* - inserts a column to the right of the selected column.
- *Delete Column* - deletes the current selected column.
- *Merge Cells Horizontally* - merges the selected cell with the cell to the right.
- *Merge Cells Vertically* - merges the selected cell with the cell below.
- *Split Cell Horizontally* - splits the selected cell into two cells side by side.
- *Split Cell Vertically* - splits the selected cell into two cells one above the other.
- *Delete Cell* - deletes the current selected cell.
- *Table Properties* - also opens the Table Wizard for options to configure the selected table.



Makes a text subscript.



Makes a text superscript.



Inserts the selected symbol.



Prints the contents of the editor using the browser's print functionality.

Ctrl+P



Selects all the text in the editor.

Ctrl+A



Inserts a page break at the cursor, which will force a page break in the PDF output.

9.7 Viewing Slides

The *Slide Viewer* displays any time you select the link for an IMM resource that has an associated PowerPoint file. The *Slide Viewer* will display both from the *Resources > IMM* tab in a new tab, when viewing an individual IMM, as well as from the *Develop* tab, when working with a resource in an element, sheet, or test item. If you have a *From Slide* value set for the IMM, then the *Slide Viewer* will start with that slide number.

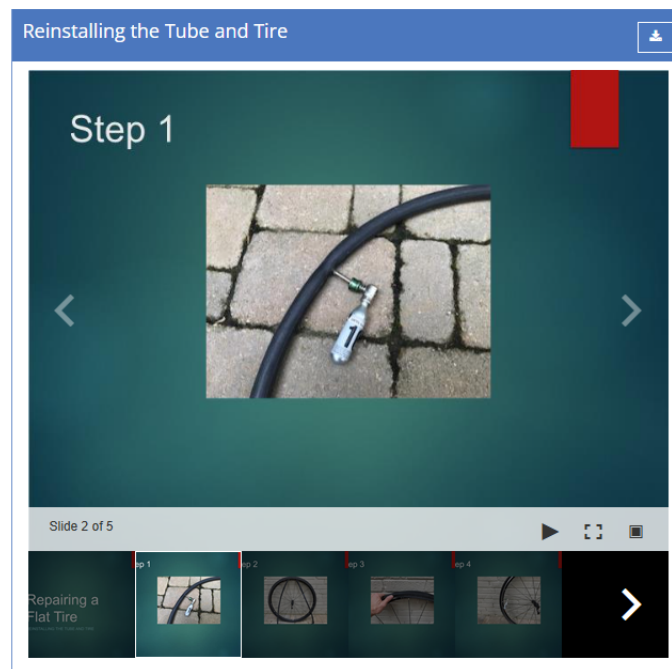







Figure 104: Slide Viewer

When you select the link for the IMM resource that has an associated PowerPoint file, LEAD will automatically create an image of each slide to display, which may take a little while. These images will be saved for 7 days in the temporary file location, so the *Slide Viewer* will display more quickly the second time you look at the slides. Once the images are ready, LEAD will display them in the *Slide Viewer*, allowing you to view the slides without having to download the PowerPoint file or launching PowerPoint itself.

When using the *Slide Viewer*, you have to following options:

- **Download**  the PowerPoint file.

- Navigate to other slides using the arrows, or the thumbnails below the main slide.
- *Play*  the slide automatically.
- *Go Full Screen*  to see more details on the slides.
- *Exit Full Screen*  to return to the smaller *Slide Viewer*.
- *Hide*  the thumbnails.
- *Show*  the thumbnails.





9.8 Working with Business Rules








When you change the status or lock various items in an initiative, the business rules will run to check whether anything is missing or incorrect for the item or any of its children. This includes the following items in LEAD:

- the initiative itself when editing on the *Initiatives > Initiatives* screen and the *Analysis/Design > Initiative Management* screens.
- the *TNA* and *TMD*.
- all skills under the *Training Needs Analysis* folder.
- all objectives.
- the table of contents items on the *Develop* tab, e.g., the course and individual modules, lessons, sections, and assessments.




The business rules will also run when you export or generate a *SCORM Package* of the initiative on the *Implement* tab. You can select which business rules run for which action or change of status on the [Customizations](#)²⁴⁴ tab. When an item fails one of more business rules, the *Business Rules Results* screen pops-up notifying you of the items that need to be fixed.


9.9 Working with Comments



You will see the *Comments* screen whenever you select the  above the tree structure in any tab of the initiative, the  at the top of a pop-up screen, the  in a tab header, or the  in a table (for the example on the *Objectives* screen). Comments can be added to most things in your initiative. You will see an option to include comments on the [Output Options](#)²⁰⁸ screen for initiative outputs that come in PDF format. On the *Comments* screen you can:


- Add a [new](#)   **Text** comment.
- **Paste**  a copied comment to the end of the list of comments, making the pasted comment your comment.
- **Copy** /**Paste**  a selected comment, making the pasted comment your comment.
- Move a selected comment **Up**  or **Down**  in the list of comments to resequence the list of comment.




For **your** comments, you can do the above and:


- **Edit**   your comments.
- **Delete**  your comments. Once you've selected **OK** to the confirmation message, an **Undo** button displays on the bottom left of the screen that allows you to revert the deletion.

If you are a [Team Member](#)  for the initiative, you can do the above and:

- **Edit**   the **Status** field of someone else's comment.

If you are the initiative [Owner](#)  or are an initiative administrator (i.e., you have the administer privilege for initiatives as part of your role), then you can the above and:

- **Edit**   the **Priority** field in addition to the **Status** field of someone else's comment.
- **Delete**  a selected comment. Once you've selected **OK** to the confirmation message, an **Undo** button displays on the bottom left of the screen that allows you to revert the deletion.

Select  in the top right of the screen to close the *Comments* screen.

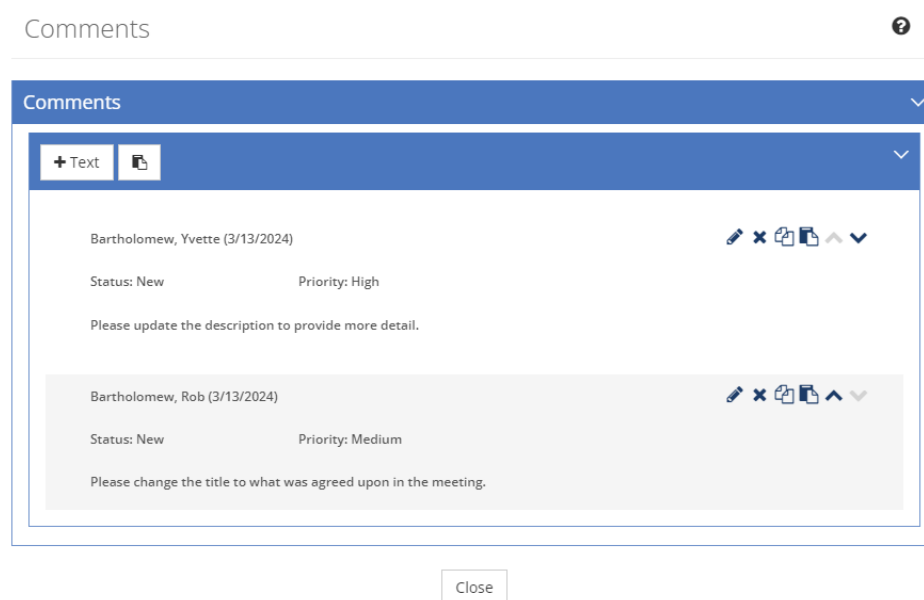


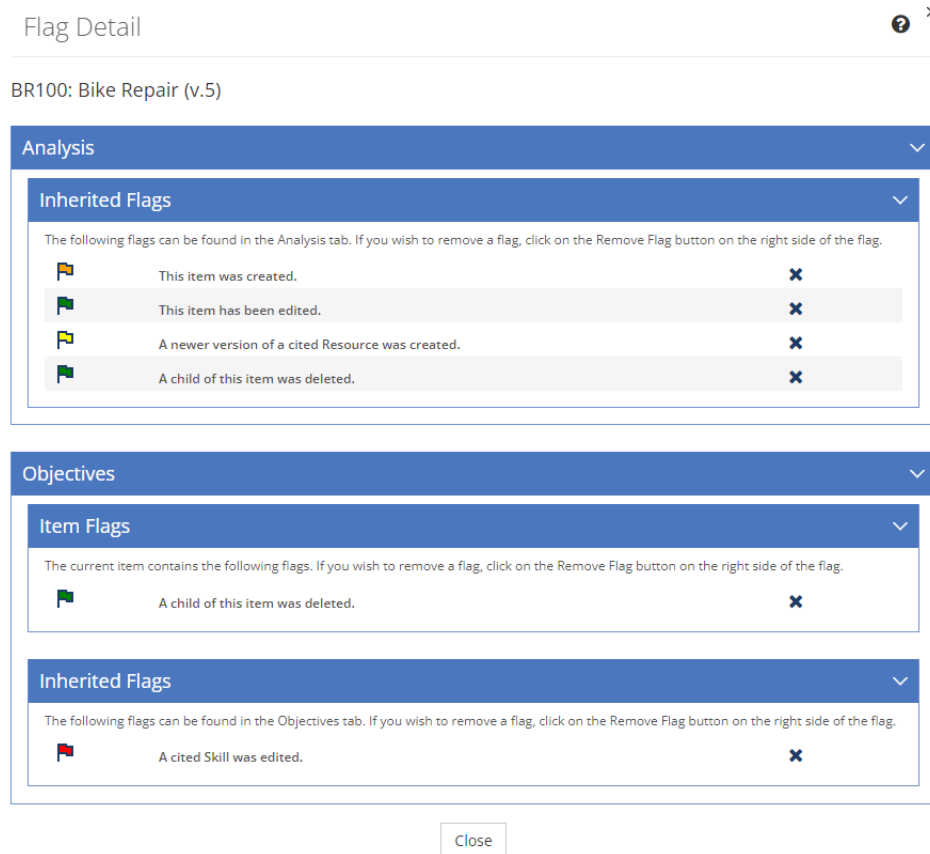
Figure 105: Comments Screen

9.10 Working with Flags

LEAD uses various flags to alert you to new versions of resources in you initiatives, as well as changes to your initiative content, after you have approved the initiative.

Explain Flag Screen and Deleting Flags

Any time you see *Explain Flag*, either above the tree structure, in a table, or next to a citation, you can review the flag or flags for the selected item. When you select *Explain Flag*, you see a list of flags that apply to the selected item or any of its subordinates. Flags on subordinate items are listed in the *Inherited Flags* tab, while flags for the selected item are listed in the *Item Flags* tab.



Flag Detail Screen - Initiatives > Initiatives Screen Example

You can delete a selected flag by selecting *Delete* . Deleting an inherited flag will delete all of the selected flag type on the subordinate items. So, if you delete an inherited new version flag, then that flag is deleted from all subordinate items. Once you've finished reviewing the flags, select *Close* to close the pop-up.

Where Flags Can Be Found

A 'flag' on an item indicates the item itself is flagged. An 'inherited' flag on an item indicates a child item of that item has a flag. Inherited flags apply specifically to tree-like items like skills, table of contents items, sheets, or elements and sub-elements. You will see flags in the following areas:




- *Initiatives > Initiatives* screen, in the list of initiatives, which will show inherited flags and deleted objective flags.
- *Analysis* tab:
 - *TNA* and the *Training Data*, *Initiative Locations* and their respective *Resources* screens, which will show item and inherited flags.
 - Task Analysis and the skills under that folder, which will show item and inherited flags.


- *Objectives* tab, in the list of objectives.
- *Design* tab:
 - *TMD* and the *Training Data*, *Initiative Locations* and their respective *Resources* screens, which will show item and inherited flags.
 - *Curriculum Development* and all table of contents items under that folder, which will show item and inherited flags.
- *Develop* tab and all items under the initiative folder, which will show item and inherited flags.

Types of Flags and Order of Precedence

This is the list of flags in LEAD, in order of precedence (so, if you have multiple flags for an item, the color of the flag is determined by which flag is higher in this list).

Note: The order of precedence and color for each flag (green, orange, red, or yellow) can be customized using the [Flag Group](#)²⁴⁷ option on the *Customization > Default Text* screen.

1. *New Version*  - This flag is added, when a new version of a resource has been created that is being cited by the item.
Note: When you [Update](#)¹⁶² to the latest version, the *New Version* flag changes to a *System* flag.
2. *System*  - These flags help identify when something an item is linked to has changed and, thus, needs to be reviewed:
 - *Updated Skill* - This flag is added to an objective when the skill the objective is based on has been modified.
 - *Updated Objective* - This flag is added to a table of contents item when the objective the table of contents item is based on has been modified; for example, if the enabling objective has changed, the section that uses the EO is flagged.
 - *Updated Resource* - This flag is added to all citations of a resource when the resource is [updated](#)¹⁶² to the latest version.
Note: When you edit a citation with a *System* flag and save the change, the *System* flag changes to a *User Edited* flag in initiatives that are at version 2 or higher. The *System* flag is removed in the first version of an initiative.
3. *User Edited*  - These flags are only added to initiatives that are at version 2 or higher:
 - *Deletion* - This flag is added when something was deleted underneath the selected item (for objectives and tree-like items only, like skills, TNA / TMD initiative locations, table of contents items, sheets, or elements and sub-elements).

- *Edited* - This flag is added to an item when the item was modified in a new version of the initiative.
 - *Resequence* - This flag is added when the items underneath the selected item have been resequenced (for objectives and tree-like items only, like skills, table of contents items, sheets, or elements and sub-elements).
4. *User Created*  - This flag is only added to initiatives that are at version 2 or higher. This flag is added to an item when the item is created in a new version of the initiative.
- Note:** The created flag will not change to an edited flag when you edit the item; you have to remove the created flag in order to get an edited flag on further edits.

This page is intentionally left blank.




Customizations

A special group of users can customize certain features of LEAD. This chapter details what can be customized in LEAD.

10 Customizations

Only designated users with a *Customizer* role have access to the *Customizations* screens, where they can customize your LEAD experience. This includes the following:

- Under *Reports* - select  to generate the *Locations/Lists Listing* spreadsheet that details all initiative locations and list items for easy review.
- Under *Customization* > [Lists](#)²²⁷ :
 - [Resource Sub-Categories](#)²²⁸ - to manage the resource sub-categories.
 - [Proficiency Levels](#)²²⁹ - to manage the proficiency levels that display in the task analysis and for the objectives, for each of the three learning domains (cognitive, affective, and psychomotor).
 - [Task Analysis Content](#)²³¹ - to manage the task analysis content that shows on the *Training Task Analysis* sub-tab for the tasks, subtasks, and steps in the task analysis for any initiative.
 - [Schedule Event Types](#)²³³ - to manage the events that can be chosen for a schedule in the *Training Management Document* on the *Design* tab of any initiative.
 - [Comment](#)²³⁵ - manage the options that display on the *Comment* screen, specifically the:
 - [Status](#)²³⁵ drop-down for a comment.
 - [Priority](#)²³⁶ drop-down for a comment.
 - [Before Text](#)²³⁷ - to manage the options that display before a resource on the *Develop* tab of any initiative.
 - [Intervention Types](#)²³⁹ - to manage the options that display on the *Type* drop-down on the *Library* > *Interventions* screen.
 - [Status of Training](#)²⁴⁰ - to manage the options that display on the *Status of Training* drop-down on the main sub-tab for the tasks, subtasks, and steps in the task analysis for any initiative.
 - [Type of Training](#)²⁴¹ - to manage what shows on the screen that opens when you select the *Type of Training* link on the main sub-tab for the tasks, subtasks, and steps in the task analysis for any initiative.
 - [Test Item Delivery](#)²⁴³ - to manage what shows on the *Test Item Delivery* drop-down on the test item editing screen on the *Initiatives* > *Develop* tab.
- *Customization* > [Business Rules](#)²⁴⁴ - to manage the business rules that apply when you change the *Status* of an item.

- *Customization* > [Configuration](#)²⁴⁵ - to manage admin settings.
- *Customization* > [Default Text](#)²⁴⁷ - to manage the default text that displays in some initiative documents, as well as standard system email messages.

10.1 Lists

On the *Customizations* > *Lists* screens, you can customize your LEAD experience. This includes the following:

- [Resource Sub-Categories](#)²²⁸ - to manage the resource sub-categories.
- [Proficiency Levels](#)²²⁹ - to manage the proficiency levels that display in the task analysis and for the objectives, for each of the three learning domains (cognitive, affective, and psychomotor).
- [Task Analysis Content](#)²³¹ - to manage the task analysis content that shows on the *Training Task Analysis* sub-tab for the tasks, subtasks, and steps in the task analysis for any initiative.
- [Schedule Event Types](#)²³³ - to manage the events that can be chosen for a schedule in the *Training Management Document* on the *Design* tab of any initiative.
- [Comment](#)²³⁵ - manage the options that display on the *Comment* screen, specifically the:
 - [Status](#)²³⁵ drop-down for a comment.
 - [Priority](#)²³⁶ drop-down for a comment.
- [Before Text](#)²³⁷ - to manage the options that display before a resource on the *Develop* tab of any initiative.
- [Intervention Types](#)²³⁹ - to manage the options that display on the *Type* drop-down on the *Library* > *Interventions* screen.
- [Status of Training](#)²⁴⁰ - to manage the options that display on the *Status of Training* drop-down on the main sub-tab for the tasks, subtasks, and steps in the task analysis for any initiative.
- [Type of Training](#)²⁴¹ - to manage what shows on the screen that opens when you select the *Type of Training* link on the main sub-tab for the tasks, subtasks, and steps in the task analysis for any initiative.
- [Test Item Delivery](#)²⁴³ - to manage what shows on the *Test Item Delivery* drop-down on the test item editing screen on the *Initiatives* > *Develop* tab.

10.1.1 Resource Sub-Categories

On the *Resource Sub-Categories* screens, you can customize what shows on the *Type* drop-downs for the resources in LEAD. You can edit entries for the following existing resource groupings:

- *Consumables*
- *IETMs (Interactive Electronic Technical Manuals)*
- *IMM (Instructional Media Materials)*
- *Publications*
- *Software*
- *Tool/Equipment*

LEAD comes with some common resource sub-categories predefined, that you can change and update as needed.

The screenshot shows the LEAD application interface. The top navigation bar is orange with the LEAD logo and a user profile for 'Bartholomew, Yvette'. The left sidebar contains navigation links: Home, Reports, Customizations (selected), Lists, Resource Sub-Categories (expanded), Consumables (selected), IETMs, IMM, Publications, Software, Tools/Equipment, and Proficiency Levels. The main content area is titled 'Consumables' and shows a breadcrumb trail: LEAD > Customizations > Lists > Resource Sub-Categories > Consumables. Below the breadcrumb is a search bar with the text 'Find: Text to search' and a 'Search' button. The main content is a table with the following data:



| No | Name | Actions | Delete |
|----|------------------------|---------|--------|
| 1 | Consumable | | |
| 2 | Fastener | | |
| 3 | Liquids and Lubricants | | |
| 4 | Paper | | |
| 5 | Printed | | |





At the bottom of the table, there are pagination controls showing 'Page size: 7' and 'Items 1 to 5 of 5 total'.

Figure 106: Resource Sub-Categories - Consumables Example

For each of the categories, you can:

- Add a entry to the existing list by selecting + New.
- Preview the *All [selected Resource Sub-Category] Report* that lists all resource sub-category entries with all the details in LEAD for each entry.
- Select a resource sub-category and then:

- Preview  the:
 - *All [selected Resource Sub-Category] Report* that lists all resource sub-category entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every resource where the selected resource sub-category is cited or used.
- [Replace](#)  one resource sub-category with another resource sub-category in the list.

Note: This will replace the resource sub-category everywhere it is used, including in approved initiatives!
- View  the entry information.
- Edit  the entry information.
- Select [Show History](#)  to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- Delete  the entry. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.1.2 Proficiency Levels

On the *Proficiency Levels* screens, you can customize what is shown on the *Proficiency Level* drop-down on the *Task*, *Subtask*, or *Step* sub-tab in the task analysis for any initiative, as well as on the *Assessment* subtab for enabling and terminal objectives. The proficiency levels are listed from lowest level to highest level in the drop-down on those screens. You can edit entries for the following learning domains:

- *Cognitive* - based on Bloom's revised taxonomy for the cognitive learning domain that covers mental skills and knowledge.
- *Affective* - based on Krathwohl's taxonomy (an adaptation of Bloom's taxonomy) for the affective learning domain that covers emotional growth and feelings.
- *Psychomotor* - based on Atkinson's adaptation of Dave's taxonomy for the psychomotor learning domain that covers manual or physical skills.

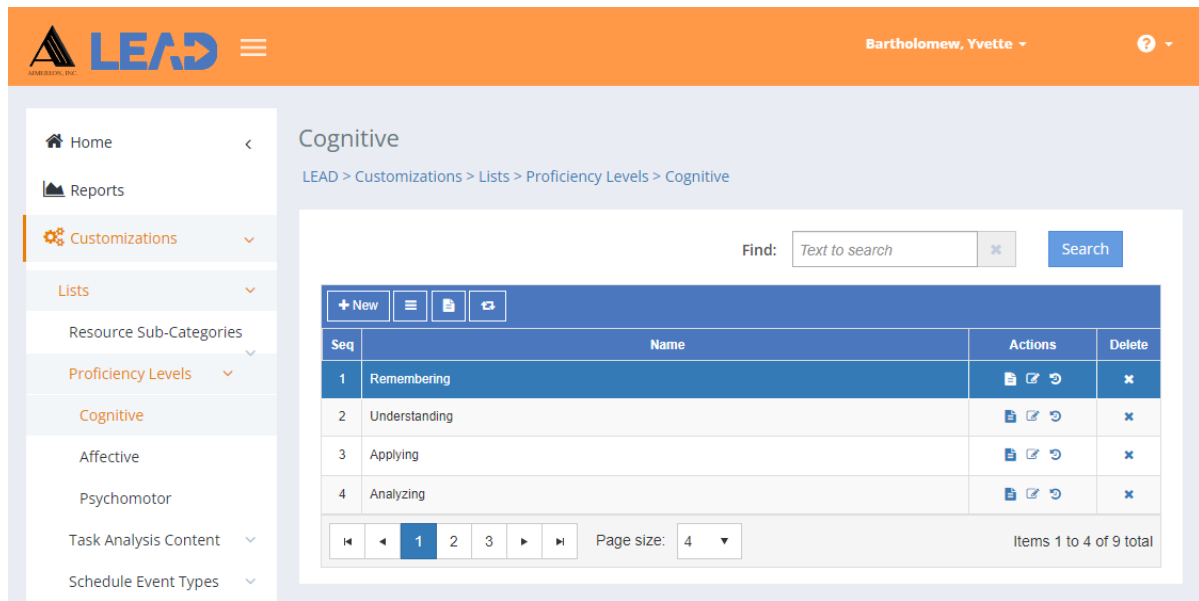











Figure 107: Proficiency Levels - Cognitive Example

For each of the learning domains, you can:

- Add a  **New** entry to the existing list by selecting + *New*.
- [Resequence](#)  the entries.
- [Preview](#)  the *All Proficiency Levels Report* that lists all proficiency level entries with all the details in LEAD for each entry.
- Select an entry and then:
 - [Preview](#)  the:
 - *All Proficiency Levels Report* that lists all proficiency level entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected proficiency level is cited or used.
 - [Replace](#)  one proficiency level with another proficiency level in the list.
Note: This will replace the proficiency level everywhere it is used, including in approved initiatives!
 - [View](#)  the entry information.
 - [Edit](#)  the entry information.
 - Select [Show History](#)  to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.

- Delete  the entry. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.1.3 Task Analysis Content

On the *Task Analysis Content* screens, you can customize what shows on the drop-downs on the *Task Analysis* sub-tab for the tasks, subtask, and steps in the task analysis for any initiative. You can edit entries for the following existing categories:

- *Safety Hazard Severity*
- *Criticality of Performance*
- *Task Delay Tolerance*
- *Frequency of Performance*
- *Probability of Inadequate Performance*
- *Difficult of Performance*
- *Task Learning Difficulty*
- *Percent Performing*
- *Percent of Time Spent on Performance*
- *Immediacy of Performance*

These categories are based on the Department of Defense Handbook: Instructional Systems Development/Systems Approach to Training and Education, MIL-HDBK-29612-2 Chapter 6.8.1.

The screenshot shows the LEAD application interface. The top navigation bar is orange with the LEAD logo and a user profile 'Bartholomew, Yvette'. The left sidebar contains a menu with 'Home', 'Reports', 'Customizations', 'Lists', and 'Task Analysis Content'. The 'Task Analysis Content' section is expanded, showing 'Safety Hazard Severity' as the selected item. The main content area displays a table titled 'Safety Hazard Severity' with the following data:






| Seq | Name | Actions | Delete |
|-----|--------------|---------|--------|
| 1 | Minor | | |
| 2 | Marginal | | |
| 3 | Critical | | |
| 4 | Catastrophic | | |

Below the table, there is a pagination control showing 'Page size: 5' and 'Items 1 to 4 of 4 total'. The sidebar also lists other categories under 'Task Analysis Content' such as 'Criticality of Performance', 'Task Delay Tolerance', 'Frequency of Performance', 'Probability of Inadequate Performance', 'Difficulty of Performance', 'Task Learning Difficulty', 'Percent Performing', 'Percent of Time Spent on Performance', and 'Immediacy of Performance'.

Figure 108: Task Analysis Content - Safety Hazard Severity Example

For each of the categories, you can:

- Add a entry to the existing list by selecting + New.
- [Resequence](#) the entries.
- [Preview](#) the *All [selected Task Analysis Content] Report* that lists all the selected *Task Analysis Content* entries with all the details in LEAD for each entry.
- Select an entry and then:
 - [Preview](#) the:
 - *All [selected Task Analysis Content] Report* that lists all the selected *Task Analysis Content* entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected *Task Analysis Content* is cited or used.

- [Replace](#)  one task analysis content with another task analysis content in the list.
Note: This will replace the task analysis content everywhere it is used, including in approved initiatives!
- [View](#)  the entry information.
- [Edit](#)  the entry information.
- Select [Show History](#)  to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- [Delete](#)  the entry. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.1.4 Schedule Event Types

On the *Schedule Event Types* screens, you can customize what shows in the:

- *Type* drop-downs on the schedule, under the *Training Management Document* on the *Design* tab of any initiative.
- *Test Type* drop-down for assignments on both the *Design* and *Develop* tabs of any initiative.

You can edit entries for the following schedule event types:

- *Class Types* - for theoretical and cognitive events, like lectures or discussions.
- *Laboratory Types* - for skill and psychomotor events, like shop or field work.
- *Assessment Types* - for all assessment or test events that are graded (non-graded assessments like quizzes can be created under *Theory* or *Laboratory*).
- *Other Types* - for all other events that you need to account for in your schedule, like administrative time or lunch.

The screenshot shows the LEAD software interface. The top navigation bar is orange with the LEAD logo and a user profile 'Bartholomew, Yvette'. The left sidebar contains a menu with 'Home', 'Reports', 'Customizations', 'Lists', 'Resource Sub-Categories', 'Proficiency Levels', 'Task Analysis Content', 'Schedule Event Types', 'Class Types', 'Lab Types', 'Assessment Types', and 'Other Types'. The main content area is titled 'Assessment Types' and shows a breadcrumb trail: 'LEAD > Customizations > Lists > Schedule Event Types > Assessment Types'. Below the breadcrumb is a search bar with the text 'Find: Text to search' and a 'Search' button. A table lists the assessment types:


| No | Name | Actions | Delete |
|----|------------------------------|---------|--------|
| 1 | Final Comprehensive Test | | |
| 2 | Knowledge Test | | |
| 3 | Midcourse Comprehensive Test | | |
| 4 | Performance Test | | |

At the bottom of the table, there are pagination controls showing 'Page size: 4' and 'Items 1 to 4 of 7 total'.

Figure 109: Schedule Event Types - Assessment Types Example



For each of the schedule event types, you can:

- Add a **New** entry to the existing list by selecting + New.
- **Preview** the *All [selected Schedule Event Type] Report* that lists all the selected *Schedule Event Type* entries with all the details in LEAD for each entry.
- Select an entry and then:
 - **Preview** the:
 - *All [selected Schedule Event Type] Report* that lists all the selected *Schedule Event Type* entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected *Schedule Event Type* is cited or used.
 - **Replace** ²⁰⁹ one schedule event type with another schedule event type in the list.
Note: This will replace the schedule event type everywhere it is used, including in approved initiatives!
 - **View** the entry information.
 - **Edit** the entry information.
 - Select **Show History** ²¹⁰ to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.

- *Delete*  the entry. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

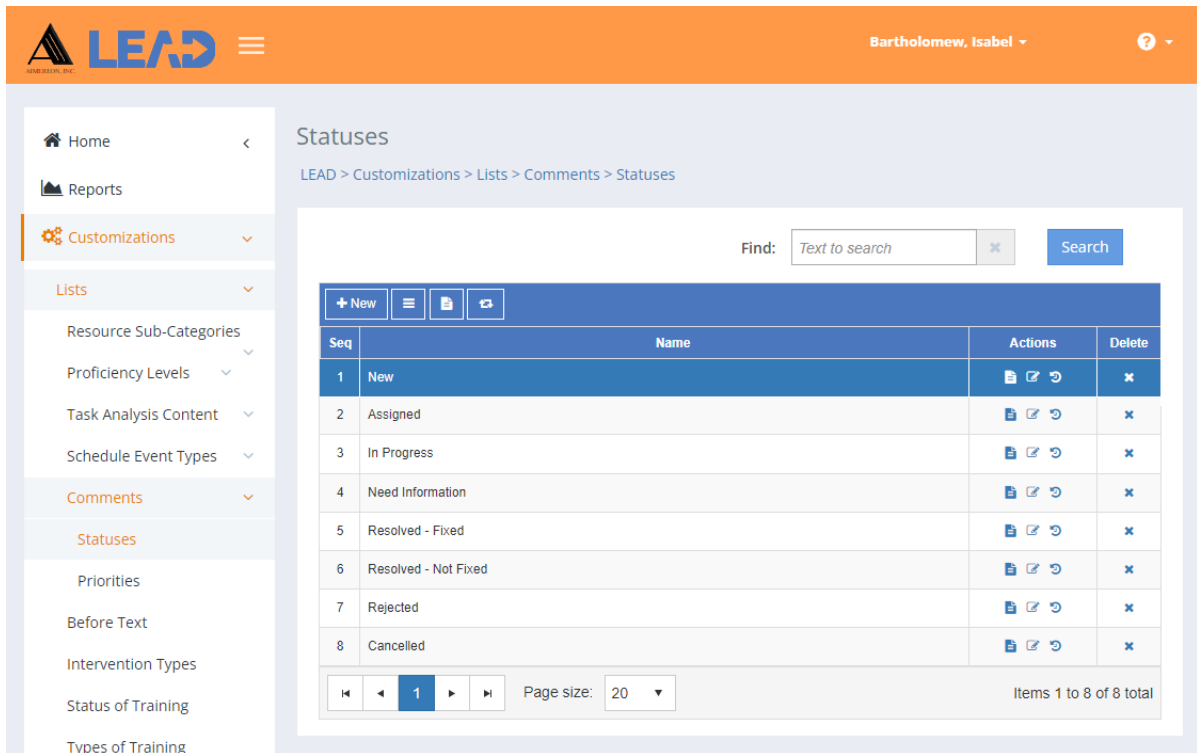
10.1.5 Comments

On the Comments screens, you can customize what shows in the:

- [Statuses](#)  ²³⁵ drop-down on all comment screens.
- [Priorities](#)  ²³⁶ drop-down on all comment screens.

10.1.5.1 Statuses

On the *Statuses* screen, you can customize what shows in the *Status* drop-down for all comments.



The screenshot displays the LEAD application interface. The top navigation bar includes the LEAD logo, a user profile for 'Bartholomew, Isabel', and a help icon. The left sidebar lists navigation options: Home, Reports, Customizations, Lists, Comments, and Statuses. The main content area is titled 'Statuses' and shows a breadcrumb trail: LEAD > Customizations > Lists > Comments > Statuses. Below the breadcrumb is a search bar with the text 'Find: Text to search' and a 'Search' button. The main area contains a table with 8 rows of status entries. Each row has columns for Seq, Name, Actions, and Delete. The table is paginated, showing items 1 to 8 of 8 total.













































| Seq | Name | Actions | Delete |
|-----|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1 | New |    |  |
| 2 | Assigned |    |  |
| 3 | In Progress |    |  |
| 4 | Need Information |    |  |
| 5 | Resolved - Fixed |    |  |
| 6 | Resolved - Not Fixed |    |  |
| 7 | Rejected |    |  |
| 8 | Cancelled |    |  |

Figure 110: Statuses

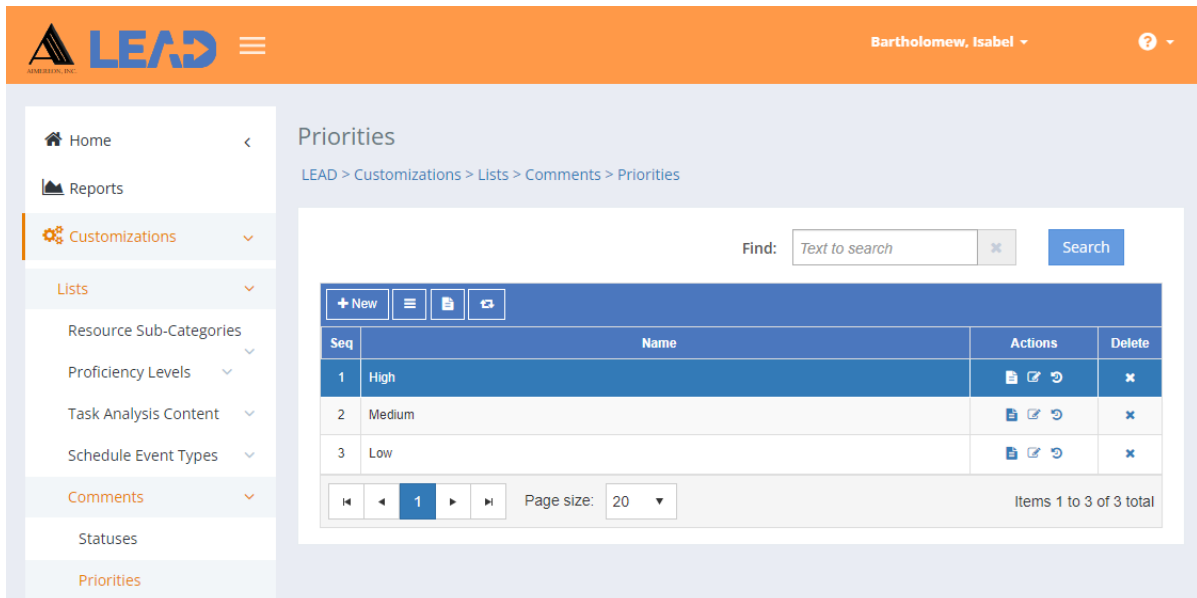
On the *Statuses* screen, you can:

- Add a  **New** entry to the existing list by selecting + *New*.
- [Resequence](#)  ²⁰⁹  the entries.
- *Preview*  the *All Statuses Report* that lists all the Status entries with all the details in LEAD for each entry.
- Select an entry and then:

- *Preview*  the:
 - *All Statuses Report* that lists all the Status entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected status is cited or used.
- *Replace*   one status with another status in the list.
Note: This will replace the status everywhere it is used, including in approved initiatives!
- *View*  the entry information.
- *Edit*  the entry information.
- Select *Show History*   to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- *Delete*  the entry. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.1.5.2 Priorities

On the *Priorities* screen, you can customize what shows in the *Priority* drop-down for all comments.



























| Seq | Name | Actions | Delete |
|-----|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1 | High |    |  |
| 2 | Medium |    |  |
| 3 | Low |    |  |

Figure 111: Priorities

On the *Priorities* screen, you can:

- Add a  entry to the existing list by selecting + New.

- [Resequence](#)   the entries.
- [Preview](#)  the *All Priorities Report* that lists all the priority entries with all the details in LEAD for each entry.
- Select an entry and then:
 - [Preview](#)  the:
 - *All Priorities Report* that lists all the priority entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected priority is cited or used.
 - [Replace](#)   one priority with another priority in the list.
Note: This will replace the priority everywhere it is used, including in approved initiatives!
 - [View](#)  the entry information.
 - [Edit](#)  the entry information.
 - Select [Show History](#)   to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - [Delete](#)  the entry. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.1.6 Before Text

On the *Before Text* screen, you can customize what shows on the *Before Text* drop-downs when you cite a resource on the *Develop* tab of any initiative, in a page or paragraph, on a sheet, or in a test item.

LEAD

Bartholomew, Yvette

Home

Reports

Customizations

Lists

Resource Sub-Categories

Proficiency Levels

Task Analysis Content

Schedule Event Types

Before Text

Intervention Types

Status of Training

Types of Training

Test Items Delivery

Business Rules

Before Text

LEAD > Customizations > Lists > Before Text

Find: Search

| Seq | Name | Actions | Delete |
|-----|--------------------------------|---------|--------|
| 3 | Ask participant to operate the | | |
| 4 | Demonstrate | | |
| 5 | Demonstrate operation of | | |
| 6 | Demonstrate use of | | |
| 7 | Discuss | | |
| 8 | Display | | |
| 9 | Draw | | |

Page size: 7

Items 1 to 7 of 15 total

Figure 112: Before Text

You can:

- Add a entry to the existing list by selecting + New.
- Resequence the entries.
- Preview the *All Before Text Report* that lists all the before text entries with all the details in LEAD for each entry.
- Select an entry and then:
 - Preview the *All Before Text Report* that lists all the before text entries with all the details in LEAD for each entry.
 - View the entry information.
 - Edit the entry information.
 - Select Show History to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - Delete the entry. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.1.7 Intervention Types

On the *Intervention Types* screen, you can customize what shows on the *Type* drop-down on the *Library > Interventions* screen.

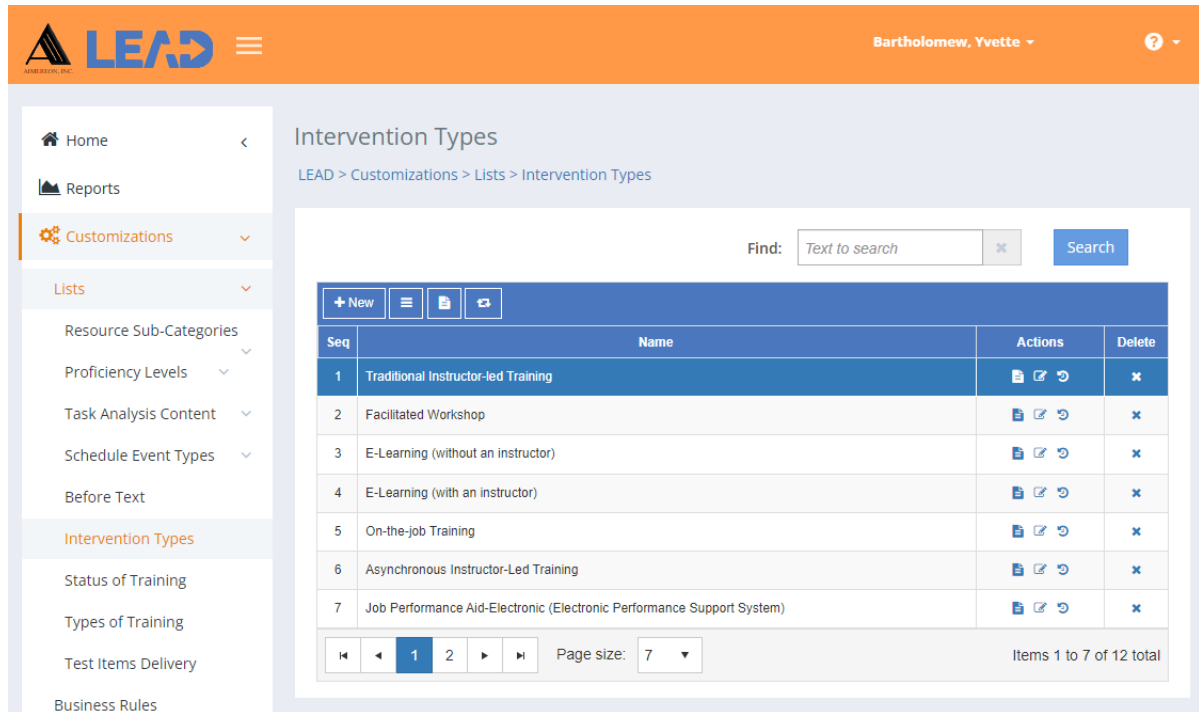







Figure 113: Intervention Types

You can:

- Add a **+ New** entry to the existing list by selecting + New.
- **Resequence** ²⁰⁹ the entries.
- **Preview** the *All Intervention Types Report* that lists all the intervention type entries with all the details in LEAD for each entry.
- Select an entry and then:
 - **Preview** the:
 - *All Intervention Types Report* that lists all the intervention type entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every intervention where the selected intervention type is cited or used.

- [Replace](#)  one intervention type with another intervention type in the list.
Note: This will replace the intervention type everywhere it is used, including in approved initiatives!
- [View](#)  the entry information.
- [Edit](#)  the entry information.
- Select [Show History](#)  to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- [Delete](#)  the entry. Once you've selected OK to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.1.8 Status of Training

On the *Status of Training* screen, you can customize what shows on the *Status of Training* drop-down on the main sub-tab for the tasks, subtasks, and steps in the task analysis for any initiative.

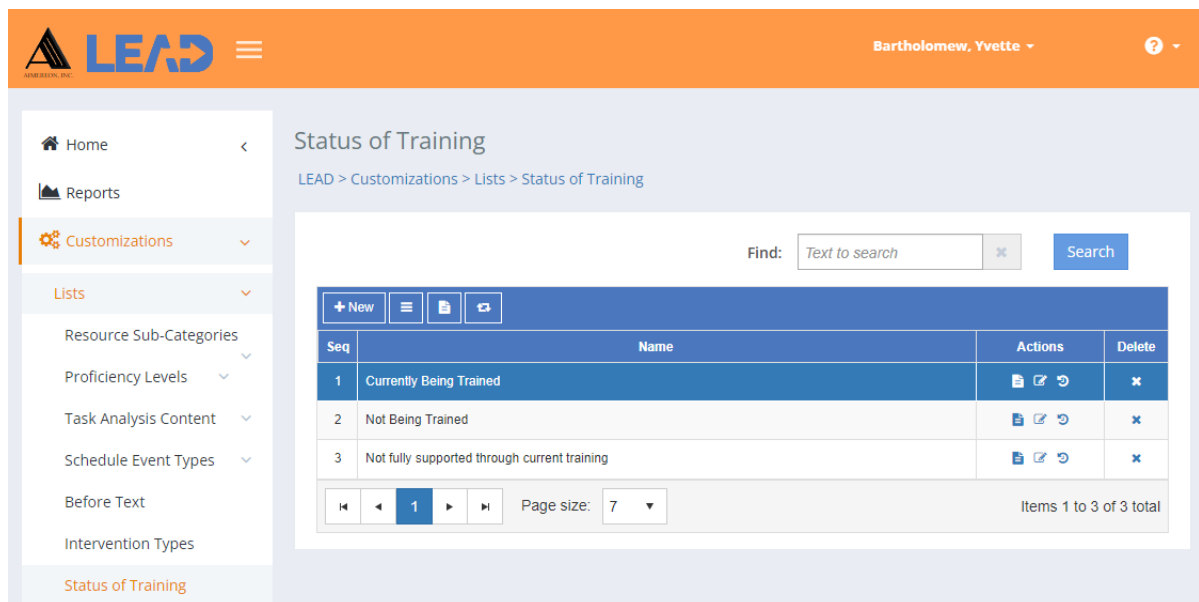












Figure 114: Status of Training

You can:

- Add a [+ New](#) entry to the existing list by selecting + *New*.
- [Resequence](#)  the entries.
- [Preview](#)  the *All Status of Training Report* that lists all the status of training entries with all the details in LEAD for each entry.

- Select an entry and then:
 - *Preview*  the:
 - *All Status of Training Report* that lists all the status of training entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected status of training is cited or used.
 - *Replace*   one status of training entry with another status of training entry in the list.

Note: This will replace the status of training entry everywhere it is used, including in approved initiatives!
 - *View*  the entry information.
 - *Edit*  the entry information.
 - Select *Show History*   to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
 - *Delete*  the entry. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.1.9 Types of Training

On the *Types of Training* screen, you can customize what shows on the screen that opens when you select the *Types of Training* link on the main sub-tab for the tasks, subtasks, and steps in the task analysis for any initiative.




The screenshot shows the LEAD software interface. The top navigation bar is orange with the LEAD logo and a user profile 'Bartholomew, Yvette'. The left sidebar contains a menu with 'Home', 'Reports', 'Customizations', and 'Lists'. Under 'Lists', there are several sub-items including 'Types of Training', which is currently selected. The main content area is titled 'Types of Training' and shows a breadcrumb trail 'LEAD > Customizations > Lists > Types of Training'. Below the title is a search bar with the placeholder 'Text to search' and a 'Search' button. A table with 7 rows is displayed, each representing a type of training. The table has columns for 'Seq', 'Name', 'Actions', and 'Delete'. The entries are: 1 Formal, 2 Qualification, 3 Informal, 4 Manual/Guidebook, 5 None, 6 Other, and 7 OJT. Each row has icons for editing, deleting, and previewing. At the bottom of the table, there are pagination controls showing 'Page size: 7' and 'Items 1 to 7 of 7 total'.

| Seq | Name | Actions | Delete |
|-----|------------------|---------|--------|
| 1 | Formal | | |
| 2 | Qualification | | |
| 3 | Informal | | |
| 4 | Manual/Guidebook | | |
| 5 | None | | |
| 6 | Other | | |
| 7 | OJT | | |

Figure 115: Types of Training

You can:

- Add a entry to the existing list by selecting + New.
- Resequence the entries.
- Preview the *All Types of Training Report* that lists all the type of training entries with all the details in LEAD for each entry.
- Select an entry and then:
 - Preview the:
 - *All Types of Training Report* that lists all the type of training entries with all the details in LEAD for each entry.
 - *Related Materials Report* that lists every initiative and place within each initiative where the selected type of training is cited or used.
 - Replace one type of training with another type of training in the list.
Note: This will replace the type of training everywhere it is used, including in approved initiatives!
 - View the entry information.
 - Edit the entry information.

- Select [Show History](#)   to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- [Delete](#)  the entry. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.1.10 Test Items Delivery

On the *Test Items Delivery* screen, you can customize what shows on the *Test Item Delivery* drop-down on the test item editing screen on the *Initiatives > Develop* tab.

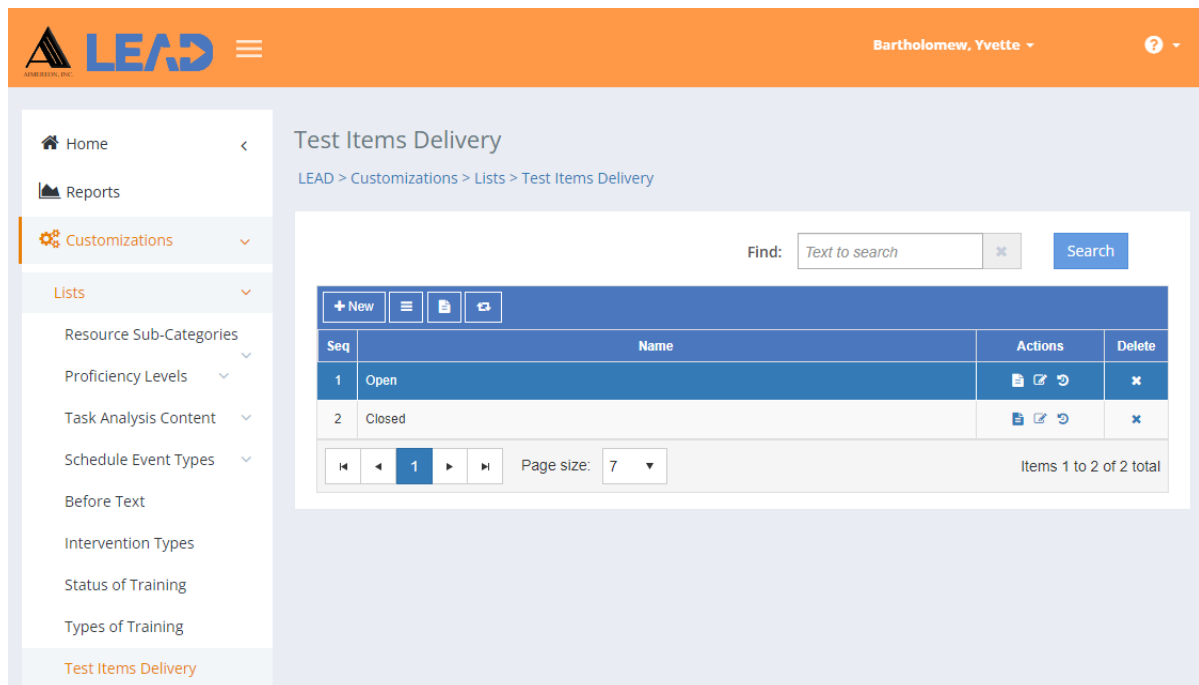












Figure 116: Test Items Delivery

On the *Test Items Delivery* screen, you can:

- Add a [+ New](#) entry to the existing list by selecting + *New*.
- [Resequence](#)  the entries.
- [Preview](#)  the *All Test Item Delivery Report* that lists all the test items delivery entries with all the details in LEAD for each entry.
- Select an entry and then:
 - [Preview](#)  the:
 - *All Test Item Delivery Report* that lists all the test items delivery entries with all the details in LEAD for each entry.

- *Related Materials Report* that lists every initiative and place within each initiative where the selected test item delivery is cited or used.
- [Replace](#)   one test item delivery with another test item delivery in the list.
Note: This will replace the test item delivery everywhere it is used, including in approved initiatives!
- [View](#)  the entry information.
- [Edit](#)  the entry information.
- Select [Show History](#)   to review the changes made to the entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.
- [Delete](#)  the entry. Once you've selected *OK* to the confirmation message, an *Undo* button displays on the bottom left of the screen that allows you to revert the deletion.

10.2 Business Rules

On the *Business Rules* screen, you can select which business rules will run for which action(s) or change(s) in status of various items in an initiative, including:

- the initiative itself when editing on the *Initiatives > Initiatives* screen and the *Analysis/Design > Initiative Management* screens.
- the *TNA* and *TMD*.
- all skills under the *Training Needs Analysis* folder.
- all objectives.
- the table of contents items on the *Develop* tab, e.g., the course and individual modules, lessons, sections, and assessments.

Business Rules
LEAD > Customizations > Business Rules

Find:

| | Name | Description | Enabled? | Actions |
|---|-----------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|----------|------------------------------------------------------------------------|
| ▼ | Elements | | | |
| | Assessment Elements with VIPr Test Items have no Knowledge Test Items | Verifies that Assessment Elements with VIPr test items do not contain any knowledge test items. | Yes | View Edit Show History |
| ▼ | Initiatives | | | |
| | Objectives Exist | Verifies there is at least one Terminal Objective and one Enabling Objective in the Initiative. | Yes | View Edit Show History |
| | Classification Selected | Verifies a Classification is selected for the Initiative. | Yes | View Edit Show History |
| | Department Selected | Verifies a Department is selected for the Initiative. | Yes | View Edit Show History |
| | Complete TNA | Verifies the TNA is at least set to Complete status. | Yes | View Edit Show History |
| | Approved TNA | Verifies the TNA is approved. | Yes | View Edit Show History |
| ▼ | Objectives (Showing 1 of 5 items. Group continues on the next page.) | | | |
| | Content Type Set | Verifies the Objective Content Type is set. | Yes | View Edit Show History |

Page size: 7 Items 1 to 7 of 57 total

Figure 117: Business Rules

For each business rule, you can select an entry and then:

- **View** the business rule.
- **Edit** the business rule.
- Select **Show History** to review the changes made to the configuration entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.

10.3 Configuration

On the *Configuration* screen, you can set up the details for a specific LEAD instance/install. This includes the settings for the system administrator email address, time limits, and email server settings, among several others.

Configuration

LEAD > Customizations > Configuration

Find:

| Type | Explanation | Value | ? | Actions |
|------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|-------|---|-------------------------------------------------------|
| User Account | | | | |
| Default Restricted Access for New Users | When creating a new User, determines whether the Is Restricted flag is set on the account by default. | Yes | | i e d |
| Deleted Users Can Be Restored | Flag whether users that are deleted can be reactivated or are actually deleted and have to be recreated if necessary. | Yes | | i e d |
| Email (Showing 3 of 7 items. Group continues on the next page.) | | | | |
| Enable Email Sending | Flag that indicates if emails should be sent. | Yes | | i e d |
| HostLogin | User name that is associated with the credentials of SMTP transactions. | | | i e d |
| HostPassword | Password that is associated with the credentials of SMTP transactions. | | | i e d |

Page size: 5 Items 1 to 5 of 50 total




Figure 118: Configuration

The configuration settings are organized in groups on the screen:

- *User Account* - includes options for restricted access for new users and how to handle deleted users.
- *Email* - includes the settings for email, whether to allow LEAD to send automated emails, as well as the email addresses to use for the LEAD administrator(s). If the email addresses don't pass validation, you will see an announcement to notify you of the problem.
- *Versioning Options* - includes the default options to be checked, when a user versions the initiative.
- *Printing* - includes the font and font size to use when generating outputs from LEAD.
- *Directories* - includes the location for web-based help, when installed in a non-standard location.
- *Debugging* - includes options for debugging issues in LEAD. Please only change these when directed by Aimereon, Inc.
- *Program* - includes various options for LEAD, including the number of tests to create when generating output packages like the ILT Package.
- *Housekeeping* - includes options on how long to retain the debug files.

- *Delay Actions* - includes options on how long the undo message stays on screen.
- *Other* - includes additional debugging options.

For each of the configuration entries, you can select an entry and then:

- *View*  the configuration information.
- *Edit*  the configuration entry.
- Select [Show History](#)  to review the changes made to the configuration entry, including the user name and date/time of saved changes, and revert to an earlier saved revision.

10.4 Default Text

On the *Default Text* screen, you can customize the , as well as the following:

- *Configuration Files*:
 - *Streaming MIME Types* - to determine whether IMM audio or video files download or play automatically when you click on the hyperlink of the IMM.
- *Email Documents*, including the:
 - default text that displays for the standard system email messages.
 - *Email Signature* used in all emails, unless changed for a specific email.
- *Assessment* instructions that display when you select the *Test Instructions* link:
 - *Proctor Instructions*.
 - *Participant (Student) Instructions*.
- *Content Type Wizard* that displays when you select the *Decision Wizard* for the *Content Type* when editing the enabling objective or the EO Level:
 - *Content Type* - instructions for using the wizard.
 - *Content Type Wizard Data* - including the examples that are used in the wizard.

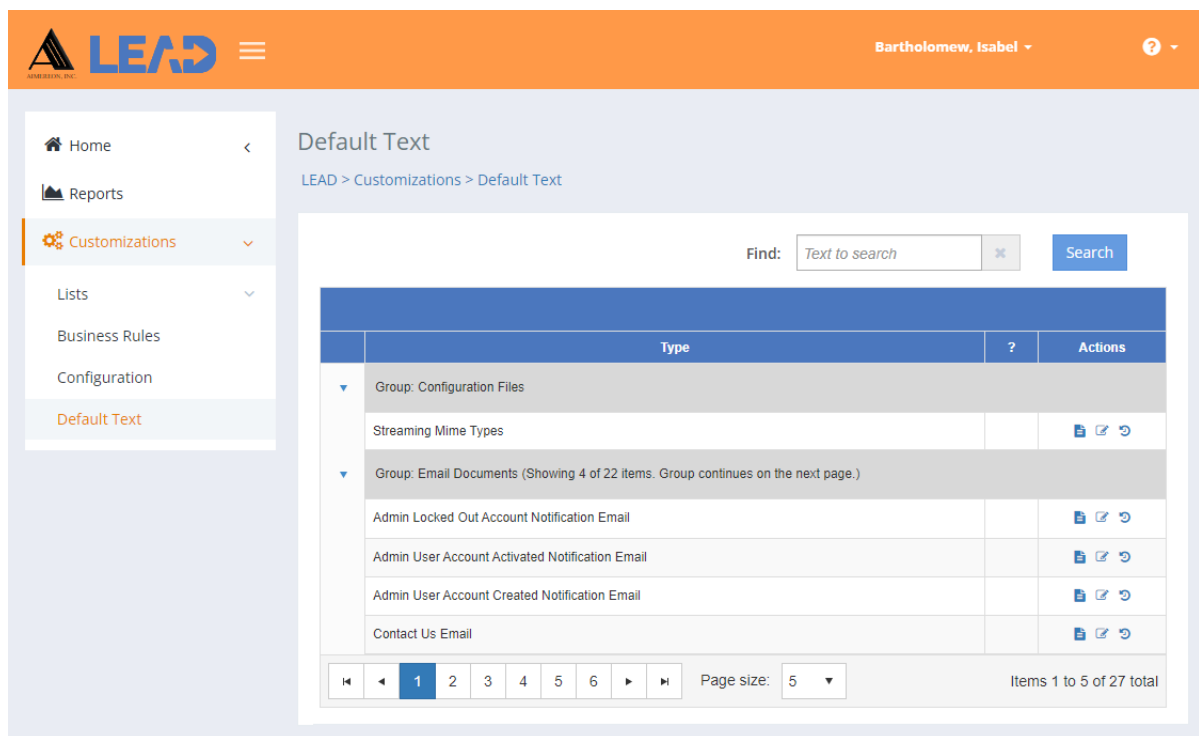


Figure 119: Default Text

For each of the default text areas, you can select an entry and then:

- **View** the default text.
- **Edit** the default text.
- Select [Show History](#) ²¹⁰ to review the changes made to the default text, including the user name and date/time of saved changes, and revert to an earlier saved revision.

Table of Figures

| | |
|--------------------------------------------------------------|----|
| Figure 1: Login Screen | 16 |
| Figure 2: Reset My Password Screen | 17 |
| Figure 3: Help Menu | 18 |
| Figure 4: Contact Us | 19 |
| Figure 5: [Your User Name] Menu | 20 |
| Figure 6: Dashboard | 22 |
| Figure 7: Milestones | 23 |
| Figure 8: Assignments | 24 |
| Figure 9: Initiatives > Initiatives | 26 |
| Figure 10: Initiatives > Analysis | 28 |
| Figure 11: Analysis/Design > Initiative Management | 29 |
| Figure 12: Initiative Management > Team Members | 30 |
| Figure 13: Initiative Management > Assignments | 30 |
| Figure 14: Initiative Management > Resource Management | 32 |
| Figure 15: Analysis > Training Needs Analysis | 34 |
| Figure 16: TNA > Justification | 36 |
| Figure 17: TNA/TMD > Initiative Overview | 37 |
| Figure 18: TNA > Milestones | 38 |
| Figure 19: TNA > Safety Risks and Hazardous Materials | 39 |
| Figure 20: TNA/TMD > Target Audience | 40 |
| Figure 21: TNA/TMD > Qualification Earned | 41 |
| Figure 22: TNA/TMD > Associated Learning Events | 42 |
| Figure 23: TNA/TMD > Training Data | 43 |
| Figure 24: TNA/TMD > Training Data > Facilities | 44 |
| Figure 25: TNA/TMD > Training Data > Funding | 45 |
| Figure 26: TNA/TMD > Training Data > Personnel | 47 |
| Figure 27: TNA/TMD > Training Data > Resources | 48 |
| Figure 28: TNA/TMD > Initiative Locations | 50 |
| Figure 29: TNA/TMD > [Selected] Initiative Location | 51 |
| Figure 30: TNA/TMD > Initiative Location > Facilities | 52 |
| Figure 31: TNA/TMD > Initiative Location > Funding | 54 |
| Figure 32: TNA/TMD > Initiative Location > Personnel | 56 |
| Figure 33: TNA/TMD > Initiative Location > Resources | 57 |
| Figure 34: Analysis > Task Analysis | 59 |
| Figure 35: Task Analysis > Job | 61 |
| Figure 36: Task Analysis > Duty | 63 |
| Figure 37: Task Analysis > Task | 65 |
| Figure 38: Task Analysis > Subtask | 67 |
| Figure 39: Task Analysis > Step | 69 |
| Figure 40: Task Analysis > Competency Selection Screen | 71 |

Table of Figures

| | |
|-----------------------------------------------------------------------------------------|-----|
| Figure 41: Analysis > Documents | 72 |
| Figure 42: Initiatives > Objectives | 73 |
| Figure 43: Initiatives > Design | 76 |
| Figure 44: Design > Training Management Document | 82 |
| Figure 45: TMD > Foreword | 83 |
| Figure 46: TMD > Changes from Previous Version | 84 |
| Figure 47: TMD > Purpose of Initiative | 86 |
| Figure 48: TMD > Training Data > Schedule | 91 |
| Figure 49: TMD > Initiative Locations > [Selected Initiative Location] > Schedule | 101 |
| Figure 50: Design > Curriculum Development | 109 |
| Figure 51: Curriculum Development > Course Level | 111 |
| Figure 52: Curriculum Development > Module Level | 112 |
| Figure 53: Curriculum Development > Terminal Objective Level | 114 |
| Figure 54: Curriculum Development > Overview or Summary | 116 |
| Figure 55: Curriculum Development > Enabling Objective Level | 118 |
| Figure 56: Curriculum Development > Assessment | 119 |
| Figure 57: Design > Testing Plan | 121 |
| Figure 58: Testing Plan > Test Matrix | 122 |
| Figure 59: Design > Documents | 123 |
| Figure 60: Initiatives > Develop | 125 |
| Figure 61: Front Matter | 126 |
| Figure 62: Course Level | 127 |
| Figure 63: Develop > Module Level | 128 |
| Figure 64: Terminal Objective Level | 130 |
| Figure 65: Overview or Summary | 131 |
| Figure 66: Enabling Objective Level | 133 |
| Figure 67: Elements | 135 |
| Figure 68: Sub-Elements: Pages/Paragraphs and Notes/Cautions/Warnings | 137 |
| Figure 69: Enabling Objective Level > Sheets | 140 |
| Figure 70: Test Items - Practice Element Example | 142 |
| Figure 71: IETM Selection Screen | 145 |
| Figure 72: Cited Resources | 147 |
| Figure 73: Cited Sheets | 149 |
| Figure 74: Assessment | 150 |
| Figure 75: Initiatives > Develop > Documents | 151 |
| Figure 76: Initiatives > Implement | 153 |
| Figure 77: Competencies | 158 |
| Figure 78: Consumables | 163 |
| Figure 79: IETMs | 165 |
| Figure 80: IMM | 167 |

Table of Figures

| | |
|--------------------------------------------------------------------------|-----|
| Figure 81: Publications | 169 |
| Figure 82: Software | 171 |
| Figure 83: Tools/Equipment | 173 |
| Figure 84: Unused Resource Management Screen | 175 |
| Figure 85: Verbs | 179 |
| Figure 86: Conditions | 180 |
| Figure 87: Standards | 182 |
| Figure 88: Knowledge | 184 |
| Figure 89: Skills | 186 |
| Figure 90: Abilities | 187 |
| Figure 91: Interventions | 189 |
| Figure 92: Reports | 192 |
| Figure 93: Announcements | 197 |
| Figure 94: Departments | 198 |
| Figure 95: Locations | 199 |
| Figure 96: Roles | 201 |
| Figure 97: System Logs | 203 |
| Figure 98: In-Use | 204 |
| Figure 99: Licensing | 205 |
| Figure 100: Resequencing Screen - Skills Example | 209 |
| Figure 101: Replacement Screen | 210 |
| Figure 102: Revision Selection Screen | 211 |
| Figure 103: Resource Selection Screen for the TNA, TMD, and Skills | 211 |
| Figure 104: Slide Viewer | 217 |
| Figure 105: Comments Screen | 220 |
| Figure 106: Resource Sub-Categories - Consumables Example | 228 |
| Figure 107: Proficiency Levels - Cognitive Example | 230 |
| Figure 108: Task Analysis Content - Safety Hazard Severity Example | 232 |
| Figure 109: Schedule Event Types - Assessment Types Example | 234 |
| Figure 110: Statuses | 235 |
| Figure 111: Priorities | 236 |
| Figure 112: Before Text | 238 |
| Figure 113: Intervention Types | 239 |
| Figure 114: Status of Training | 240 |
| Figure 115: Types of Training | 242 |
| Figure 116: Test Items Delivery | 243 |
| Figure 117: Business Rules | 245 |
| Figure 118: Configuration | 246 |
| Figure 119: Default Text | 248 |

This page is intentionally left blank.

- A -

- Abilities 187
 - All Abilities Spreadsheet 188
 - Approve 188
 - Delete 188
 - Related Materials Report 188
- About LEAD
 - Version 18
- Admin 196
 - Announcements 196
 - Departments 197
 - In-Use 203
 - Licenses 204
 - Locations 199
 - Roles 201
 - System Logs 202
 - Users 200
- All Abilities Spreadsheet 188
- All Conditions Spreadsheet 181
- All Interventions Spreadsheet 189
- All Knowledge Spreadsheet 184
- All Resources Spreadsheet
 - Consumables 163
 - IETMs 165
 - IMM 167
 - Publications 169
 - Software 171
 - Tools/Equipment 173
- All Skills Spreadsheet 186
- All Standards Spreadsheet 182
- All Verbs Spreadsheet 179
- Analysis Documents
 - Skill Hierarchy 72
 - Training Needs Analysis 72
- Analysis tab 28
 - Documents 72
 - Initiative Management 29, 77
 - Task Analysis 59
 - Training Needs Analysis 33
- Announcements 196
 - Delete 197
 - License Announcement 17
 - New Announcements 17
 - Read 17
- Assessment 119
 - Create New Version 150

- View Test Design Considerations 149
- Assessment Package 153
- Assessment Test Items 141
- Assignments 30, 78
 - Find 23
- Associated Learning Events (TNA/TMD) 41, 88

- B -

- Before Text
 - All Before Text Spreadsheet 238
 - Customize 237
 - Delete 238
- Business Rules 218
 - Customize 244

- C -

- Caution Entry 144
- Chapter 117
 - Add Element 132
 - Cited Resources 146
 - Cited Sheets 149
- Cited Resources 146
 - Missing File Resources 147
- Cited Sheets 149
- Comment Priorities
 - All Priorities Spreadsheet 237
 - Customize 236
 - Delete 237
 - Related Materials Report 237
- Comment Statuses
 - All Statuses Spreadsheet 236
 - Customize 235
 - Delete 236
 - Related Materials Report 236
- Comments 218
 - Generate All Comments 154
- Common Actions 208
- Competencies 158
- Conditions 180
 - All Conditions Spreadsheet 181
 - Approve 181
 - Delete 181
 - Related Materials Report 181
- Configuration
 - Customize 245

- Consumables 162
 - All Consumables Spreadsheet 163
 - Approve 164
 - Delete 164
 - Impact Report 164
 - Related Materials Report 163
 - Unused Resources Spreadsheet 163
- Contact Us 19
- Course Level 110
 - Cited Resources 146
 - Cited Sheets 149
- Curriculum Development
 - Assessment 119
 - Course Level 110
 - Enabling Objective Level 117
 - Module Level 112
 - Overview 116
 - Summary 116
 - Terminal Objective Level 113
- Curriculum Development (Design tab) 108
- Customizations 226
 - Before Text 237
 - Business Rules 244
 - Comment Statuses 235
 - Comments 235
 - Configuration 245
 - Default Text 247
 - Intervention Types 239
 - Lists 227
 - Priorities 236
 - Proficiency Levels 229
 - Resource Sub-Categories 228
 - Schedule Event Types 233
 - Status of Training 240
 - Task Analysis Content 231
 - Test Items Delivery 243
 - Types of Training 241
- Caution Entry 144
- Module Level 112
- Note Entry 144
- Text Entry 144
- Warning Entry 144
- Design Documents
 - Objective Assessment Information 123
 - Testing Plan 123
 - Traceability Matrix 123
 - Training Design Document 123
 - Training Management Document 123
 - Training Outline 123
- Design tab 75
 - Curriculum Development 108
 - Documents 123
 - Initiative Management 29, 77
 - Testing Plan 120
 - Training Management Document 81
- Develop Documents
 - Instructor Guide 151
 - Objective Assessment Information 151
 - Participant Guide 151
 - Storyboard 151
 - Testing Plan 151
 - Traceability Matrix 151
 - Training Design Document 151
 - Training Management Document 151
 - Training Outline 151
- Develop tab 124
 - Assessment 149
 - Course Level 126
 - Enabling Objective Level 132
 - Front Matter 126
 - Module Level 128
 - Overview 131
 - Sheets 138
 - Summary 131
 - Terminal Objective Level 129

- D -

- Dashboard 22
- Default Text
 - Customize 247
- Departments 197
 - All Departments Report 198
 - Delete 199
 - Related Materials Report 198
- Design Considerations

- E -

- Edit 247
- Element
 - Add 132
 - Copy 136
 - Edit Storyboard 135
 - Major Heading 135
 - Paste EO Level 133

Element

- Paste Overview 132
- Paste Summary 132
- Paste/Append 136
- View Design Considerations 135
- View Storyboard 135

Enabling Objective Level 117

- Add Element 132
- Assessment Element 141
- Cited Resources 146
- Cited Sheets 149
- Create New Version 133
- Delete 118
- Paste Element 133
- Practice Element 141
- Test Items 141

Enabling Objectives

- Edit 75

Error Messages

- System Logs 202

Existing Interventions 188

- Approve 190
- Delete 190

- F -

Find Assignments 23

Flags

- Delete 220
- Explain 220
- New Version (yellow) 222
- System (red) 222
- User Created (orange) 223
- User Edited (green) 222

Font Size 213

Foreword (TMD) 82

Forgot Password 16

Formatting Text

- Text Editor 212

Front Matter

- IG/PG 126

- H -

Help 18

- Contact Us 19

History

Revert 209, 210

Review 209, 210

- I -

IETMs 164

- All IETMs Spreadsheet 165
- Approve 166
- Delete 166
- Impact Report 166
- Missing File Resources Spreadsheet 166
- Node Selection 145
- Related Materials Report 166
- Table of Contents Selection 145
- Unused Resources Spreadsheet 165

ILT Package 153

IMM 167

- All IMM Spreadsheet 167
- Approve 168
- Delete 168
- Impact Report 168
- Missing File Resources Spreadsheet 168
- Related Materials Report 168
- Unused Resources Spreadsheet 167

Impact If Not Approved 35

Impact Report

- Consumables 164
- IETMs 166
- IMM 168
- Publications 170
- Resource Management 33, 81
- Resources (TNA/TMD) 49, 97
- Software 172
- Tools/Equipment 174

Implement tab

- All Comments 154
- Assessment Package 153
- ILT Package 153
- Instructor Guide 153
- Instructor Guide Package 153
- Objective Assessment Information 154
- Participant Guide 153
- Participant Guide Package 153
- SCORM Package 153
- Skill Hierarchy 154
- Testing Plan 154
- Traceability Matrix 154
- Training Design Document 155

- Implement tab
 - Training Management Document 154
 - Training Needs Analysis 154
 - Training Outline 155
- Initiative Locations (TNA/TMD)
 - Delete 49, 50, 97, 98
 - Edit 49, 50, 97, 98
 - Facilities 52, 102
 - Funding 53, 103
 - Personnel 55, 104
 - Resources 57, 106
 - Schedule 100
 - View 49, 50, 97, 98
- Initiative Overview (TNA/TMD) 36, 84
- Initiatives 26
 - Analysis tab 28
 - Curriculum Development (Design tab) 108
 - Design tab 75
 - Develop tab 124
 - Export 27
 - Implement tab 152
 - Initiative Management 29, 77
 - Objectives tab 72
 - Resource Management 31, 79
 - Task Analysis 59
 - Testing Plan 120
 - Training Management Document 81
 - Training Needs Analysis 33
 - Unused Resource Management 175
 - Version Assessment 150
 - Version EO Level 133
 - View All Cited Resources 31, 79
- Instructor Guide
 - Front Matter 126
 - Generate PDF 151, 153
- Instructor Guide Package 153
- Intervention Types
 - All Intervention Types Spreadsheet 239
 - Customize 239
 - Delete 240
 - Related Materials Report 239
- Interventions 188
 - All Interventions Spreadsheet 189
 - Approve 190
 - Delete 190
 - Related Materials Report 189
- In-Use
 - Delete 203

- Review 203

- J -

- Justification

- Changes from Previous Version (TMD) 83
 - Edit 36

- K -

- Knowledge 183
 - All Knowledge Spreadsheet 184
 - Approve 185
 - Delete 185
 - Related Materials Report 184

- L -

- LEAD

- About 18
 - Export Initiative 27
 - License Agreement 19
 - Version 18

- Lesson Level 113, 129
 - Cited Resources 146
 - Cited Sheets 149

- Library 178
 - Abilities 187
 - Conditions 180
 - Existing Interventions 188
 - Interventions 188
 - Knowledge 183
 - Skills 185
 - Standards 181
 - Verbs 178

- License Agreement 19

- Licenses 204
 - Add 205
 - Delete 205
 - New 205

- Locations 199
 - All Locations Report 200
 - Delete 200
 - Related Materials Report 200

- Log Out 19

- Login
 - Forgot Password 16

Login
 Request an Account 16
 Single-Sign-On 17
 User ID 15
Login History
 [Your User Name] 20
 All Logins 193

- M -

Major Heading 135
Mentoring - TO Level 113, 129
 Cited Resources 146
 Cited Sheets 149
Milestones 37
 Add or Create 37
 Add Self-Assigned - Dashboard 22
Missing File Resources Spreadsheet
 IETMs 166
 IMM 168
Module - TO Level 113, 129
 Cited Resources 146
 Cited Sheets 149
Module Level 112
 Cited Resources 146
 Cited Sheets 149
 Delete 113
My Profile
 Edit 20
 Preferences 20
 View 20

- N -

Note Entry 144

- O -

Objective Assessment Information
 Generate Spreadsheet 123, 151, 154
Objective Skill Basis
 Edit 75
Objectives
 Add or Edit 72
 View 72
Objectives tab
 Enabling Objectives 75

Skill Basis 75
 Terminal Objectives 75
Output Options 208
Overview
 Add Element 131
 Cited Resources 146
 Paste Element 132

- P -

Page
 Caution Entry 144
 Edit Storyboard 136
 Note Entry 144
 Resource Entry 146
 Select Resource 144
 Sheet Entry 146
 Subheading 136
 Text Entry 144
 View Design Considerations 136
 View Storyboard 136
 Warning Entry 144
Paragraph
 Caution Entry 144
 Edit Storyboard 136
 Note Entry 144
 Resource Entry 146
 Select Resource 144
 Sheet Entry 146
 Subheading 136
 Text Entry 144
 View Design Considerations 136
 View Storyboard 136
 Warning Entry 144
Participant Guide
 Front Matter 126
 Generate PDF 151, 153
Participant Guide Package 153
Password
 Change Your Password 20
Personnel (TNA/TMD)
 Edit (for the Initiative Location) 55, 104
 View (for the Initiative Location) 55, 104
Practice Test Items 141
Preferences 20
Print Preview Options 208
Procedure 117
 Add Element 132

- Procedure 117
 - Cited Resources 146
 - Cited Sheets 149
 - Proficiency Levels
 - All Proficiency Levels Spreadsheet 230
 - Customize 229
 - Delete 231
 - Related Materials Report 230
 - Publications 169
 - All Publications Spreadsheet 169
 - Approve 170
 - Impact Report 170
 - Related Materials Report 170
 - Unused Resources Spreadsheet 169
 - Purpose of Initiative (TMD) 85
- Q -**
- Qualification Earned (TNA/TMD) 40, 87
- R -**
- Related Materials Report
 - Abilities 188
 - Conditions 181
 - Consumables 163
 - Customizations > Comment Priorities 237
 - Customizations > Comments Statuses 236
 - Customizations > Intervention Types 239
 - Customizations > Proficiency Levels 230
 - Customizations > Resource Sub-Categories 229
 - Customizations > Schedule Event Types 234
 - Customizations > Status of Training 241
 - Customizations > Task Analysis Content 232
 - Customizations > Test Items Delivery 243
 - Customizations > Types of Training 242
 - Departments 198, 200
 - IETMs 166
 - IMM 168
 - Interventions 189
 - Knowledge 184
 - Publications 170
 - Resource Management 33, 81
 - Skills 186
 - Software 172
 - Standards 182
 - Tools/Equipment 174
 - Verbs 179
 - Reports
 - All Conditions/Standards 193
 - All Departments 193
 - All Initiatives 193
 - All Interventions 193
 - All KSAs 193
 - All Resources 193
 - Generate Outputs 192
 - Locations/Lists Listing 192
 - Login History 193
 - Restricted Users and their Initiatives 193
 - Unused Resources 193
 - User Listing 193
 - Resequenece Items 209
 - Resource Entry 146
 - Resource Management 31, 79
 - Impact Report 33, 81
 - Missing File Resources 32, 80
 - Related Materials Report 33, 81
 - Resource Sub-Categories
 - All Resource Sub-Categories Spreadsheet 229
 - Customize 228
 - Delete 229
 - Related Materials Report 229
 - Resources 162
 - Consumables 162
 - IETMs 164
 - IMM 167
 - Publications 169
 - Resource Entry (Develop tab) 146
 - Select (Develop tab) 144
 - Software 171
 - Tools/Equipment 173
 - Unused Resource Management 175
 - Resources (TNA/TMD)
 - Missing 34
 - Select 211
 - View 48, 96
 - View (for the Initiative Location) 57, 106
 - Review History 209, 210
 - Roles 201
 - Customizer 202
 - Delete 202
 - Reviewer 202

- S -

- Safety Risks and Hazardous Materials (TNA) 38
- Schedule (TMD)
 - View 91
- Schedule Event Types
 - All Schedule Event Types Spreadsheet 234
 - Customize 233
 - Delete 235
 - Related Materials Report 234
- SCORM Package 153
- Section - EO Level 117
 - Add Element 132
 - Cited Resources 146
 - Cited Sheets 149
- Section - TO Level 113, 129
 - Cited Resources 146
 - Cited Sheets 149
- Self-Assigned Assignments
 - Delete 23
- Self-Assigned Milestones
 - Delete 22
- Sheet Entry - Page/Paragraph 146
- Sheet Test Items 141
- Sheets
 - Assignment 138
 - Caution Entry 144
 - Diagram 138
 - Information 138
 - Job 138
 - Note Entry 144
 - Outline 138
 - Problem 138
 - Resource Entry 141
 - Select Resource 144
 - Sheet Entry - Page/Paragraph 146
 - Text Entry 144
 - Warning Entry 144
- Skill Hierarchy 72, 154
- Skills 185
 - All Skills Spreadsheet 186
 - Approve 187
 - Delete 187
 - Related Materials Report 186
- Software 171
 - All Software Spreadsheet 171
 - Approve 172

- Delete 172
 - Impact Report 172
 - Related Materials Report 172
 - Unused Resources Spreadsheet 171
- Standards 181
 - All Standards Spreadsheet 182
 - Approve 183
 - Delete 183
 - Related Materials Report 182
- Status of Training
 - All Status of Training Spreadsheet 241
 - Customize 240
 - Delete 241
 - Related Materials Report 241
- Storyboard 143
 - Caution Entry 144
 - Generate PDF 151
 - Note Entry 144
 - Page 136
 - Paragraph 136
 - Resource Entry 146
 - Select Resource 144
 - Text Entry 144
 - Warning Entry 144
- Sub-Element 136
- Subheading 136
- Subject 117
 - Add Element 132
 - Cited Resources 146
 - Cited Sheets 149
- Summary
 - Add Element 131
 - Cited Resources 146
 - Paste Element 132
- System Logs 202
 - Export 203

- T -

- Target Audience (TNA/TMD) 39, 86
- Task Analysis
 - Ability 70
 - Add or Edit Ability 70
 - Add or Edit Condition 70
 - Add or Edit Interventions 70
 - Add or Edit Knowledge 70
 - Add or Edit Resources 70
 - Add or Edit Skill 70

- Task Analysis
 - Add or Edit Standard 70
 - Condition 70
 - Copy Duty 63
 - Copy Job 61
 - Copy Step 69
 - Copy Subtask 67
 - Copy Task 66
 - Duty 62
 - Edit 59
 - Edit Competency Selection 70
 - Edit Task 64
 - Interventions 70
 - Job 60
 - Knowledge 70
 - Paste Duty 61
 - Paste Skill 60
 - Paste Step 67
 - Paste Subtask 66
 - Paste Task 63
 - Resources 70
 - Select from Competencies 70
 - Select Resources 211
 - Skill 70
 - Skill Hierarchy Output 72
 - Standard 70
 - Step 68
 - Subtask 66
 - Task 64
- Task Analysis Content
 - All Task Analysis Content Spreadsheet 232
 - Customize 231
 - Delete 233
 - Related Materials Report 232
- Team Members
 - View 29, 77
- Terminal Objective Level 113
 - Cited Resources 146
 - Cited Sheets 149
 - Delete 115
- Terminal Objectives
 - Edit 75
- Test Design Considerations
 - View 149
- Test Items 141
 - Caution Entry 144
 - Note Entry 144
 - Resource Entry 146
 - Select Resource 144
 - Sheet Entry - Performance Job Sheet 146
 - Text Entry 144
 - Warning Entry 144
- Test Items Delivery
 - All Test Items Delivery Spreadsheet 243
 - Customize 243
 - Delete 244
 - Related Materials Report 243
- Test Matrix
 - Edit 121
 - View 121
- Testing Plan
 - Edit 120
 - Generate PDF 123, 151, 154
 - Test Matrix 121
- Text Editor
 - Font Sizes 213
 - Formatting Text 212
 - Using 212
- Text Entry 144
- TMD Resources
 - Impact Report 49, 97
 - Uncited Resources Report 48, 96
 - Unlisted Resources Report 49, 97
- TNA Resources
 - Impact Report 49, 97
 - Uncited Resources Report 48, 96
 - Unlisted Resources Report 49, 97
- Tools/Equipment 173
 - All Tools/Equipment Spreadsheet 173
 - Approve 174
 - Delete 174
 - Impact Report 174
 - Related Materials Report 174
 - Unused Resources Spreadsheet 173
- Traceability Matrix
 - Generate Spreadsheet 123, 151, 154
- Training Data (TMD)
 - Schedule 91
- Training Data (TNA/TMD)
 - Facilities 44, 92
 - Funding 45, 93
 - Impact Report 49, 97
 - Personnel 46, 94
 - Select Resources 211
 - Uncited Resources Report 48, 96
 - Unlisted Resources Report 49, 97

- Training Data (TNA/TMD)
 - View Resources 48, 96
 - Training Design Document
 - Generate PDF 123, 151, 155
 - Training Management Document
 - Associated Learning Events 41, 88
 - Changes from Previous Version 83
 - Edit 81
 - Facilities 44, 92
 - Facilities (for the Initiative Location) 52, 102
 - Foreword 82
 - Funding 45, 93
 - Funding (for the Initiative Location) 53, 103
 - Generate PDF 123, 151, 154
 - Impact Report 49, 97
 - Initiative Locations 49, 97
 - Initiative Overview 36, 84
 - Missing Resources 34
 - Personnel 46, 94
 - Personnel (for the Initiative Location) 55, 104
 - Purpose of Initiative 85
 - Qualification Earned 40, 87
 - Resources (for the Initiative Location) 57, 106
 - Schedule 91
 - Schedule (for the Initiative Location) 100
 - Select Resources 211
 - Target Audience 39, 86
 - Training Data 42, 89
 - Uncited Resources Report 48, 96
 - Unlisted Resources Report 49, 97
 - View Resources 48, 96
 - Training Needs Analysis
 - Associated Learning Events 41, 88
 - Facilities 44, 92
 - Facilities (for the Initiative Location) 52, 102
 - Funding 45, 93
 - Funding (for the Initiative Location) 53, 103
 - Generate PDF 72, 154
 - Impact Report 49, 97
 - Initiative Locations 49, 97
 - Initiative Overview 36, 84
 - Justification 35
 - Milestones 37
 - Missing Resources 34
 - PDF Output 72
 - Personnel 46, 94
 - Personnel (for the Initiative Location) 55, 104
 - Qualification Earned 40, 87
 - Resources (for the Initiative Location) 57, 106
 - Safety Risks and Hazardous Materials 38
 - Select Resources 211
 - Target Audience 39, 86
 - Training Data 42, 89
 - Uncited Resources Report 48, 96
 - Unlisted Resources Report 49, 97
 - View Resources 48, 96
 - Training Outline
 - Generate PDF 123, 151, 155
 - Type of Training
 - Delete 243
 - Types of Training
 - All Types of Training Spreadsheet 242
 - Customize 241
 - Related Materials Report 242
- U -**
- Uncited Resources Report
 - Resources (TNA/TMD) 48, 96
 - Unlisted Resources Report
 - Resources (TNA/TMD) 49, 97
 - Unused Resource Management 175
 - Unused Resources Spreadsheet
 - Consumables 163
 - IETMs 165
 - IMM 167
 - Publications 169
 - Software 171
 - Tools/Equipment 173
 - Users 200
 - Edit My Profile 20
 - Login 15
 - Request an Account 16
 - Single-Sign-On 17
 - View My Profile 20
- V -**
- Verbs 178
 - All Verbs Spreadsheet 179
 - Approve 180
 - Delete 180
 - Related Materials Report 179

- W -

- Warning Entry 144
- Workshop 113
 - Cited Resources 146
 - Cited Sheets 149
- Workshop - TO Level 129