

LEAD Documentation

User Manual

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LEAD

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, to learning objectives, to assessments, and to content.
- Resources to learning events, and to specific pieces of content.

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

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.

- Use the [Forgot Password?](#)¹⁰ link to receive a temporary password, if you have forgotten your password. If you managed to lock yourself out, your LEAD manager will get an automatic email notification, so they can unlock your account.

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 manager 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 manager 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 manager to review your request and send you a temporary password. Alternatively, you can ask a LEAD manager to reset your password.

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 (hamburger 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 resizable 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. 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](#) ¹² 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 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, select *Help* next to the X on a pop-up window. This will open help for the current pop-up 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.

1.4 Your User Name

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

- [My Profile](#)¹² to view and edit your account information and preferences.
- [Change Password](#)¹² to change your password.
- *Log Out* to close your session in LEAD. Remember to close your browser, too.

1.4.1 My Profile

On the *My Profile Detail* screen, you can review or edit your account information and preferences. Only a LEAD manager can edit fields marked "(not user editable)".

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.



Dashboard

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

2 Dashboard

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


- Selecting any Initiative will open that initiative in the *Initiatives > Analysis* screen.
- Selecting a Milestone will open that milestone in the *Home > Milestones* screen.
- Selecting an Assignment will open that assignment in the *Home > Assignments* 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*.

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).

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 *+New*.

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](#)  ¹⁰⁰ 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* screen.

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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* 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.

Unlike the *Dashboard*, this screen will show all the initiatives in LEAD, depending on your *Filter* selection, of course. 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 use one of the icons above the list to:

- Create a [New](#)¹⁸ initiative.
- Change the [State](#)¹⁸ of the initiative.
- *Search* for an initiative.
- Select [Explain Flag](#)¹¹⁰ to review the reasons the initiative has been flagged.
- *Lock* the initiative to prevent any user from making changes without first unlocking the initiative.

Or you can use the icons in the *Actions* column to:

- *View* the detailed information of the initiative.
- [Edit](#)¹⁹ the initiative information.
- Select [Show History](#)¹⁰⁰ 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.

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. Small arrows in the column header let you know which way the data is currently sorted.

3.1 Analysis

On the *Analysis* tab, you can manage your initiative, complete the *Training Needs Analysis* and the *Task Analysis*. You can also generate the analysis documents under the *Documents* folder.

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). If you need even more space, click on the three-

bar icon (hamburger 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 hamburger icon again.

3.1.1 Initiative Management


When you click on the *Initiative Management* folder, you can edit information about the initiative, and when you expand the folder, you can manage the *Team Members*, *Assignments*, and *Resources* for the initiative. You can access this folder from both the *Initiatives > Analysis* and the *Initiatives > Design* screens.

3.1.1.1 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.

3.1.1.2 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. On this screen you can:

- Create a *New* assignment.
- 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.

3.1.1.3 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.*

On this screen:

- Use the *Type* drop-down to limit the list of resources to a specific sub-category, as set up on [Customization](#)¹¹³ 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 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*.
 - *Export* a spreadsheet listing all cited resources.
 - View the different versions of a resource by clicking on the arrow in the first column.
 - Select a resource and then:
 - Generate a *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
 - Generate an *Impact Report* that lists every place within the initiative where *any previous version* of the selected resource is cited or used.
 - [Update](#)¹⁹ 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.

3.1.2 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?

When you click on the *TNA* folder, you can edit information about the Training Needs Analysis and initiative, and when you expand the folder, you can capture the information required for the TNA in the folders/fields under the TNA, this includes information about 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* (as shown in the title for each area in this document) until the TNA is approved.

3.1.2.1 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)*
- *Cost / Benefit Analysis*
- *Changes from Previous Version*
- *Impact If Not Approved*

You can:

- View the information.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.1.2.2 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.

You can:

- View the information by clicking on the *Initiative Overview* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.1.2.3 Milestones (TNA Only)

The Milestone screen lists of the milestones for this initiative. You can add milestones by selecting *+New*. 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](#)¹⁰⁰ 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.

3.1.2.4 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.

You can:

- *View* the information by clicking on the *Safety Risks and Hazardous Materials* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.1.2.5 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.

You can:

- *View* the information by clicking on the *Target Audience* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.1.2.6 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.

You can:

- *View* the information by clicking on the *Qualification Earned* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.1.2.7 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.

You can:

- View the information by clicking on the *Associated Learning Events* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.1.2.8 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. You can view the information by clicking on *Training Data* in the tree structure, once there you can:

- *Edit* the training data.
- Select [Show History](#)¹⁰⁰ to review the changes made to the training data, 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* needed to deliver the learning event.

3.1.2.8.1 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. On this screen you can:

- View the facility information by selecting *Facilities* under the *Training Data* folder.

- *Edit* the information.
- Select [Show History](#)  ¹⁰⁰ 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.

3.1.2.8.2 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 a loss of data. The fiscal year used in LEAD is whatever fiscal year your organization uses. On the *Funding* screen you can:

- *View* the funding information by selecting *Funding* under the *Training Data* folder.
- *Edit* the information.
- Add New funding or expense rows in the table.
- *Delete* funding or expense rows in the table.
- Select [Show History](#)  ¹⁰⁰ 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.

3.1.2.8.3 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.

On this screen you can:

- *View* the personnel information by selecting *Personnel* under the *Training Data* folder.

- *Edit* the information.
- Select [Show History](#)¹⁰⁰ 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.

3.1.2.8.4 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. On this screen you can:

- *View* the selected resource list by selecting *Resources* under the *Training Data* folder.
- Select [Show History](#)¹⁰⁰ 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 a resource and then:
 - Generate a *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
 - [Update](#)²⁵ to the latest version of a resource.
 - *View* a selected resource.
- *Edit* the resource list:
 - *On Hand* and *Required* quantities.
Note: If a resource is missing in the output of the TNA or TMD, but is listed on the screen, check the *Required* quantity. If the *Required* quantity is set to 0, it will not output in the TNA or TMD.
 - *Delete* a selected resource from the list (provided it is not selected or cited on the *Develop* tab).
 - [Select resources](#)¹⁰¹ for the list.

3.1.2.9 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. You can add a *New* initiative location to the TNA or TMD from this screen. Initiative Locations are created on the [Admin > Locations](#)⁹⁵ screen.

Once you selected the initiative location, you can:

- *View* the initiative location's information, including 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.

- *Edit* the initiative location's information.
- Select [Show History](#)¹⁰⁰ 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.
- *Delete* the selected initiative location from the initiative.

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

- *Schedule* for delivering the learning event (in the TMD only).
- *Facilities* needed to deliver the learning event at that initiative location.
- *Funding* needed to deliver the learning event at that initiative location.
- *Personnel* needed to deliver the learning event at that initiative location.
- *Resources* needed to deliver the learning event at that initiative location.

3.1.2.9.1 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. 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.
- Select [Show History](#)¹⁰⁰ 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.

3.1.2.9.2 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 a 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. 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.
- Add New funding or expense rows in the table.
- Delete funding or expense rows in the table.
- Select [Show History](#)  ¹⁰⁰ 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.

3.1.2.9.3 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.

On this screen you can:

- View the personnel information by selecting *Personnel* under the selected *Initiative Location*.
- Edit the information.
- Select [Show History](#)  ¹⁰⁰ 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.

3.1.2.9.4 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. On this screen you can:

- View the selected resource list by selecting *Resources* under the selected *Initiative Location*.
- Select [Show History](#)¹⁰⁰ 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 a resource and then:
 - Generate a *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
 - View a selected resource.
- Edit the resource list:
 - On Hand and Required quantities
Note: If a resource is missing in the output of the TNA or TMD, but is listed on the screen, check the *Required* quantity. If the *Required* quantity is set to 0, it will not output in the TNA or TMD.
 - [Select resources](#)¹⁰¹ for the list.
 - Delete a selected resource from the list (provided it is not selected or cited on the *Develop* tab and it was added only for this Initiative Location).

3.1.3 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* - 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.
 - *Duty* - is a grouping of tasks. One duty is automatically created for every job. You can add duties to help you manage the tasks.
 - *Task* - 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. You can break down a task into two or more subtasks, if needed.
- *Subtask* - is a major part of a tasks. You can break down a subtask into two or more steps, if needed.

- *Step* - 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.

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.
- [Resequence](#)¹⁰⁰ the jobs below the *Task Analysis* folder in the tree structure.
- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the skill hierarchy.
- *Delete* a selected job.
- Select [Explain Flag](#)¹¹⁰ 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.

3.1.3.1 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. On the *Job* screen you can:

- View the information by clicking on the *Job* folder.
- *Edit* the information.
- Add New duties.
- [Resequence](#)¹⁰⁰ the duties below the job folder in the tree structure.
- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the skill hierarchy.
- *Delete* the selected job (including all duties, tasks, subtasks, and steps under the job).
- Select [Explain Flag](#)¹¹⁰ 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.

3.1.3.2 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. On the *Duty* screen you can:

- View the information by clicking on the *Duty* folder.
- Edit the information.
- [Resequence](#)¹⁰⁰ the tasks below the *Duty* folder in the tree structure.
- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the skill hierarchy.
- Delete the selected duty (including all tasks, subtasks, and steps under the duty).
- Select [Explain Flag](#)¹¹⁰ to review the reasons the duty has been flagged.
- Use *Create From Competencies* to select competencies to add to your skill hierarchy.

3.1.3.3 Task

LEAD creates tasks automatically when you first select tasks, knowledge, skills, or abilities from the 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](#)³⁰ - for the main information about the task.
- [Task Attributes](#)³⁰ - 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. [Conditions](#)⁸⁵ and [Standards](#)⁸⁵ can be added to the *Library* in LEAD, while [Resources](#)⁷⁶ are listed in their respective categories on the *Resources* tab.
- [Training Task Analysis](#)³⁰ - 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*¹¹⁵.

- [KSAs](#)¹³⁰ - the supporting knowledge, skill, and ability statements that support the task, selected from the KSAs in LEAD. You can easily add KSA entries on the [Library](#)¹⁸⁴ tab.
- [Interventions](#)¹³⁰ - any existing interventions that support the task, selected from the Interventions in LEAD. You can easily add interventions entries on the [Library](#)¹⁸⁴ tab.

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](#)¹⁰⁰ the subtasks below the task folder in the tree structure.
- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the skill hierarchy.
- *Delete* the selected task (including all subtasks, and steps under the task).
- Select [Explain Flag](#)¹¹⁰ to review the reasons the task has been flagged.

3.1.3.4 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 two tabs that you can minimize to see just the information you are working on:

- [Subtask](#)¹³¹ - for the main information about the subtask.
- [Subtask Attributes](#)¹³¹ - 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. [Conditions](#)⁸⁵ and [Standards](#)⁸⁵ can be added to the *Library* in LEAD, while [Resources](#)⁷⁶ are listed in their respective categories on the *Resources* tab.
- [Interventions](#)¹³¹ - any existing interventions that support the subtask, selected from the Interventions in LEAD. You can easily add interventions entries on the [Library](#)¹⁸⁴ tab.

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](#)¹⁰⁰ the steps below the *Subtask* folder in the tree structure.

- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the skill hierarchy.
- Select *Delete* the selected subtask (including all steps under the subtask).
- [Explain Flag](#)¹¹⁰ to review the reasons the subtask has been flagged.

3.1.3.5 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 two tabs that you can minimize to see just the information you are working on:

- [Step](#)³² - for the main information about the step.
- [Step Attributes](#)³² - 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. [Conditions](#)⁸⁵ and [Standards](#)⁸⁵ can be added to the *Library* in LEAD, while [Resources](#)⁷⁶ are listed in their respective categories on the *Resources* tab.
- [Interventions](#)³² - any existing interventions that support the task, selected from the Interventions in LEAD. You can easily add interventions entries on the [Library](#)⁸⁴ tab.

On this screen you can:

- *View* the information by clicking on the *Step* folder.
- *Edit* the information.
- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the skill hierarchy.
- *Delete* the selected step.
- Select [Explain Flag](#)¹¹⁰ to review the reasons the step has been flagged.

3.1.3.6 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.

[Conditions](#)⁸⁵ and [Standards](#)⁸⁵ need to be added to the *Library* tab, while [Resources](#)⁷⁶ need to be created on the *Resources* tab, before they can be selected on the *Task*, *Subtask*, or *Step Attributes* tab.

3.1.3.7 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.

[Knowledge](#)⁸⁶, [Skills](#)⁸⁶, and [Abilities](#)⁸⁷ (KSAs) need to be created on the [Library](#)⁸⁴ tab, before they can be selected on the *KSAs* tab of a task.

3.1.3.8 Adding Interventions

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

[Interventions](#)⁸⁸ need to be created on the [Library](#)⁸⁴ tab, before they can be selected on the *KSAs* tab of a task.

3.1.3.9 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](#)⁷⁴, 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 *Major Occupation*, *Minor Occupation*, *Broad Jobs*, and *Jobs* in the tree structure. Underneath each *Job* you will see the *Tasks* listed, along with folders for the *Knowledge*, *Skills*, and *Abilities* listings.

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

3.1.4 Documents

Under the *Documents* folder, you have two 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.
- *Skill Hierarchy* - a spreadsheet of the information contained in the *Task Analysis* folders.

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

3.2 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).

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 [Show History](#)¹⁰⁰ 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
- Add a *New* objective, based on one or more skills or KSA entries from the task analysis
- [Resequence](#)¹⁰⁰ the objectives in the teaching or learning order
- *Print Preview* 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](#)¹¹⁰ to review the reasons the objective has been flagged

3.2.1 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* tab - the text of the objective, version, and type of objective.
- *Skill Basis* tab - the skill basis of the objective.
- *Assessment* tab - information about how the objective should be assessed.

3.2.2 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* tab - the text of the objective, version, and type of objective.
- *Skill Basis* tab - the skill basis of the objective.
- *Assessment* tab - information about how the objective should be assessed.

3.2.3 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.

3.3 Design

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

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). If you need even more space, click on the three-bar icon (hamburger 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 hamburger icon again.

3.3.1 Initiative Management

When you click on the *Initiative Management* folder, you can edit information about the initiative, and when you expand the folder, you can manage the *Team Members*, *Assignments*, and *Resources* for the initiative. You can access this folder from both the *Initiatives > Analysis* and the *Initiatives > Design* screens.

3.3.1.1 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.

3.3.1.2 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. On this screen you can:

- Create a *New* assignment.
- Select an assignment and:
 - View the detailed information of the assignment.
 - *Edit* the assignment information.
 - Select [Show History](#)¹⁰⁰ 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.

3.3.1.3 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*.

On this screen:

- Use the *Type* drop-down to limit the list of resources to a specific sub-category, as set up on [Customization](#)¹¹³ 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 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*.
- *Export* a spreadsheet listing all cited resources.
- View the different versions of a resource by clicking on the arrow in the first column.
- Select a resource and then:
 - Generate a *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
 - Generate an *Impact Report* that lists every place within the initiative where *any previous version* of the selected resource is cited or used.
 - [Update](#)¹⁹ 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.

3.3.2 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. When you click on the TMD folder, you can edit information about the initiative, and when you expand the folder, you can capture the information required for the TMD in the folders/fields under the TMD.

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.

3.3.2.1 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.

You can:

- View the foreword by clicking on the *Foreword* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.3.2.2 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.

You can:

- View the information by clicking on the *Changes from Previous Version* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.3.2.3 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.

You can:

- View the information by clicking on the *Initiative Overview* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.3.2.4 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.

You can:

- View the information by clicking on the *Purpose of Initiative* folder.
- [Edit](#)¹⁰¹ the information.

- Select [Show History](#)¹⁰⁰ 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.

3.3.2.5 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.

You can:

- View the information by clicking on the *Target Audience* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.3.2.6 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.

You can:

- View the information by clicking on the *Qualification Earned* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.3.2.7 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.

You can:

- View the information by clicking on the *Associated Learning Events* folder.
- [Edit](#)¹⁰¹ the information.
- Select [Show History](#)¹⁰⁰ 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.

3.3.2.8 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. You can view the information by clicking on *Training Data* in the tree structure, once there you can:

- *Edit* the training data.
- Select [Show History](#)¹⁰⁰ to review the changes made to the training data, 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* needed to deliver the learning event.

3.3.2.8.1 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). For each entry on the schedule, 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.

On this screen you can:

- *View* the schedule by selecting *Schedule* under the *Training Data* folder.
- Select [Show History](#)¹⁰⁰ 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.
- *Edit* the information.
- Add *New* schedule entries, based on a table of contents item or none (for schedule events not linked to a table of contents item).
- *Delete* a selected schedule entry from the list.

- [Resequence](#)¹⁰⁰ the scheduled events.
- Use *Add Missing* to add any missing table of contents items to the schedule automatically.
- *Update* a selected schedule entry's linked table of contents item.

You can manage the schedule event types that are listed on this screen on the [Customization](#)¹¹⁶ tab. The timings you provide on this screen display for the table of contents items on the *Initiatives > Design > Curriculum Development* screens and on the *Initiatives > Develop* screens.

3.3.2.8.2 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. On this screen you can:

- *View* the facility information by selecting *Facilities* under the *Training Data* folder.
- *Edit* the information.
- Select [Show History](#)¹⁰⁰ 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.

3.3.2.8.3 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 a loss of data. The fiscal year used in LEAD is whatever fiscal year your organization uses. On the *Funding* screen you can:

- *View* the funding information by selecting *Funding* under the *Training Data* folder.
- *Edit* the information.
- Add *New* funding or expense rows in the table.
- *Delete* funding or expense rows in the table.
- Select [Show History](#)¹⁰⁰ 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.

3.3.2.8.4 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.

On this screen you can:

- View the personnel information by selecting *Personnel* under the *Training Data* folder.
- Edit the information.
- Select [Show History](#)¹⁰⁰ 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.

3.3.2.8.5 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. On this screen you can:

- View the selected resource list by selecting *Resources* under the *Training Data* folder.
- Select [Show History](#)¹⁰⁰ 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 a resource and then:
 - Generate a *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
 - [Update](#)²⁵ to the latest version of a resource.
 - View a selected resource.
- Edit the resource list:

- *On Hand* and *Required* quantities.

Note: If a resource is missing in the output of the TNA or TMD, but is listed on the screen, check the *Required* quantity. If the *Required* quantity is set to 0, it will not output in the TNA or TMD.

- *Delete* a selected resource from the list (provided it is not selected or cited on the *Develop* tab).
- [Select resources](#)¹⁰¹ for the list.

3.3.2.9 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. You can add a *New* initiative location to the TNA or TMD from this screen. Initiative Locations are created on the [Admin > Locations](#)⁹⁵ screen.

Once you selected the initiative location, you can:

- *View* the initiative location's information, including 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.
- *Edit* the initiative location's information.
- Select [Show History](#)¹⁰⁰ 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.
- *Delete* the selected initiative location from the initiative.


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

- *Schedule* for delivering the learning event (in the TMD only).
- *Facilities* needed to deliver the learning event at that initiative location.
- *Funding* needed to deliver the learning event at that initiative location.
- *Personnel* needed to deliver the learning event at that initiative location.
- *Resources* needed to deliver the learning event at that initiative location.

3.3.2.9.1 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.

On this screen you can:

- View the schedule by selecting *Schedule* under the *Initiative Location* folder.
- Select [Show History](#)  ¹⁰⁰ 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.
- *Edit* some of the standard schedule information, as well as all of the information of Initiative Location specific schedule entries.


3.3.2.9.2 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. 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.
- Select [Show History](#)  ¹⁰⁰ 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.

3.3.2.9.3 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 a 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. 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.
- Add New funding or expense rows in the table.
- *Delete* funding or expense rows in the table.
- Select [Show History](#)  ¹⁰⁰ 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.

3.3.2.9.4 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.

On this screen you can:


- View the personnel information by selecting *Personnel* under the selected *Initiative Location*.
- Edit the information.
- Select [Show History](#)  ¹⁰⁰ 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.

3.3.2.9.5 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. On this screen you can:

- View the selected resource list by selecting *Resources* under the selected *Initiative Location*.
- Select [Show History](#)  ¹⁰⁰ 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 a resource and then:

- Generate a *Related Materials Report* that lists every place within the initiative where the selected resource is cited or used.
- View a selected resource.
- *Edit* the resource list:
 - *On Hand* and *Required* quantities

Note: If a resource is missing in the output of the TNA or TMD, but is listed on the screen, check the *Required* quantity. If the *Required* quantity is set to 0, it will not output in the TNA or TMD.
 - [Select resources](#) ¹⁰¹ for the list.
 - *Delete* a selected resource from the list (provided it is not selected or cited on the *Develop* tab and it was added only for this Initiative Location).

3.3.3 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

To make life easier, use *Add Missing* to automatically create the basic structure based on the objectives. If your scope is some kind of course, a default *Module* is added. You can then choose to add additional modules to group the lessons in your course. Once you've built the basic structure, you have the following actions available to you:

- Add a *New Module* or *Assessment*.

- View the table of contents item by clicking on the relevant folder.
- Edit the information (including the title).
- [Resequence](#)¹⁰⁰ the items below the selected item in the tree structure.
- Select [Show History](#)¹⁰⁰ 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.
- Print 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 yet).
- View/Edit the *Design Considerations* as every level that gather information about the table of contents item to help with the development of the learning event.
- Select [Explain Flag](#)¹¹⁰ 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.

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

- Add a New [Module](#)⁵⁰ or [Assessment](#)⁵³.
- View the table of contents item by clicking on the relevant folder.
- [Edit](#)⁴⁹ the information (including the title for modules and below, but not the *Status* - you can edit the *Status* on the Develop tab).
- [Resequence](#)¹⁰⁰ the items below the selected item in the tree structure.
- Select [Show History](#)¹⁰⁰ 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.
- Print 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).
- Select [Explain Flag](#)¹¹⁰ 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.
- *View/Edit* the [Design Considerations](#)⁴⁹ at every level that gather information about the table of contents item to help with the development of the learning event.

3.3.3.2 Module Level

Only initiatives with a *Scope* of *Course*, *Distance Learning Course*, *Module*, or *Distance Learning Module* have a module level. 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:

- Add a New [Assessment](#)⁵³.
- *View* the table of contents item by clicking on the relevant folder.
- [Edit](#)⁵⁰ the information (including the title for modules and below, but not the *Status* - you can edit the *Status* on the *Develop* tab).
- [Resequence](#)¹⁰⁰ the items below the selected item in the tree structure.
- Select [Show History](#)¹⁰⁰ 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.
- *Print 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).
- Select [Explain Flag](#)¹¹⁰ 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).
- *View/Edit* the [Design Considerations](#)⁵⁰ at every level that gather information about the table of contents item to help with the development of the learning event.

3.3.3.3 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: **Lesson**

- Manual: **Section**
- Mentoring: **Mentoring**
- On-the-Job Training (OJT): **Level**
- Performance Support: **Module**
- Workshop: **Workshop**

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:

- Add a New [Assessment](#)¹⁵³.
- View the table of contents item by clicking on the relevant folder.
- [Edit](#)⁵⁰ the information (including the title, but not the *Status* - you can edit the *Status* on the Develop tab).
- [Resequence](#)¹⁰⁰ the items below the selected item in the tree structure.
- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the table of contents outline (structure of your initiative with applicable objectives).
- *Delete* an item at the terminal objective level or below (provided no content exists on the Develop tab).
- Select [Explain Flag](#)¹¹⁰ 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.
- View/Edit the *Objective* information by selecting the link.
- View/Edit the [Design Considerations](#)⁵⁰ at every level that gather information about the table of contents item to help with the development of the learning event.

3.3.3.4 Overview/Summary

Underneath the [Terminal Objective Level](#)⁵⁰, you will see an *Overview* folder prior to the [Enabling Objective Level\(s\)](#)⁵² and a *Summary* folder at the end. On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- [Edit](#)⁵¹ the information (including the title, but not the *Status* - you can edit the *Status* on the Develop tab).

- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the table of contents outline (structure of your initiative with applicable objectives).
- Select [Explain Flag](#)¹¹⁰ to review the reasons the Overview or Summary has been flagged.
- *View/Edit* the [Design Considerations](#)⁵¹ at every level that gather information about the table of contents item to help with the development of the learning event.

3.3.3.5 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**

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

- *View* the table of contents item by clicking on the relevant folder.
- [Edit](#)⁵² the information (including the title, but not the *Status* - you can edit the *Status* on the *Develop* tab).
- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the table of contents outline (structure of your initiative with applicable objectives).
- *Delete* an item at the enabling objective level (provided no content exists on the *Develop* tab).
- Select [Explain Flag](#)¹¹⁰ to review the reasons the table of contents item has been flagged.
- *View/Edit* the *Objective* information by selecting the link.

- View/Edit the [Design Considerations](#)⁵² at every level that gather information about the table of contents item to help with the development of the learning event.

3.3.3.6 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. On this screen, you can:


- View the assessment information by clicking on the assessment.
- [Edit](#)⁵³ the information (including the title, but not the *Status* - you can edit the *Status* on the *Develop* tab).
- Select [Show History](#)¹⁰⁰ 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.
- *Print Preview* the table of contents outline (structure of your initiative with applicable objectives).
- *Delete* the assessment (provided no content exists on the *Develop* tab).
- Select [Explain Flag](#)¹¹⁰ to review the reasons the assessment has been flagged.
- View the [Objective](#)⁵³ information by selecting *View*.
- View/Edit the [Test Design Considerations](#)⁵³.

3.3.4 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.

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

- *View* the information by selecting the relevant folder.
- *Edit* the information.
- Select [Show History](#)  ¹⁰⁰ 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.
- *Print Preview* the testing plan.

3.3.4.1 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. On this screen you can:

- *View* the information.
- *Edit* weight assigned to each assessment.
- Select [Show History](#)  ¹⁰⁰ 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.

3.3.5 Documents

Under the *Documents* folder, you have several 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 under the *Curriculum Development* folder, along with the objectives, the design considerations, assessment information, and the test design considerations.
- *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.
- *Testing Plan* - a PDF document of the information listed under the *Testing Plan* folder.
- *Training Outline* - a spreadsheet listing the table of contents under the *Curriculum Development* folder, along with their status and their objectives.
- *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 *Print Preview* to generate the document.

3.4 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](#)⁵⁵ information for the output generated for the instructor/facilitator and the participants with predefined [Elements](#)⁵⁹ (or headings) to which you can add [paragraphs, notes, cautions, or warnings](#)⁶⁰.
- [Terminal Objective Level](#)⁵⁷ entries (i.e., Lessons) have *Overview* and *Summary* folders before and after the *Enabling Objective Level* entries (i.e., Sections).
- *Overview* and *Summary* folders to which you can add [Elements](#)⁵⁹ (or main headings), under which you can add [paragraphs, notes, cautions, or warnings](#)⁶⁰.
- [Enabling Objective Level](#)⁵⁸ entries (i.e., Sections) contain the actual learning content, including:
 - [Sheets](#)⁶¹ that will print in the *Participant Guide* (or similar output).
 - [Elements](#)⁵⁹ (or main headings) for the content structure, based on the content type, under which you can add [paragraphs, notes, cautions, or warnings](#)⁶⁰.
 - *Practice* [test items](#)⁶², which will print in the output for the instructor/facilitator.
 - *Assessment* [test items](#)⁶², which will output in an assessment.
- [Assessment](#)⁶⁸ entries that allow you to edit the test instructions for a given assessment.

Use the tree structure to expand out the 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). If you need even more space, click on the three-bar icon (hamburger 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 hamburger icon again.

3.4.1 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). As part of the [Customizations](#)¹¹² of LEAD, three default elements (headings) with default paragraphs (subheadings) and corresponding text entries have been set up for the front matter:

- | | |
|-----------------------------------|------------------------------------|
| • IG | • PG |
| ○ How to Use the Instructor Guide | ○ How to Use the Participant Guide |

- Safety Hazard Awareness
- Security Awareness
- Safety Hazard Awareness
- Security Awareness

3.4.2 Course Level

Only initiatives with a *Scope of Course* or *Distance Learning Course* have a course level. On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- [Edit](#)⁵⁶ the information (including the title for modules and below).
- [Print Preview](#)⁶⁶ the Instructor Guide, Participant Guide, 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](#)¹¹⁰ to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)⁶⁶ at every level that lists all resources used or cited anywhere below the selected table of contents item on the Develop tab.
- View the [Design Considerations](#)⁵⁶ at every level that gather information about the table of contents item to help with the development of the learning event.

3.4.3 Module Level

Only initiatives with a *Scope of Course*, *Distance Learning Course*, *Module*, or *Distance Learning Module* have a module level. On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- [Edit](#)⁵⁶ the information (including the title for modules and below).
- [Print Preview](#)⁶⁶ the Instructor Guide, Participant Guide, 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](#)¹¹⁰ to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)⁶⁶ at every level that lists all resources used or cited anywhere below the selected table of contents item on the Develop tab.
- View the [Design Considerations](#)⁵⁶ at every level that gather information about the table of contents item to help with the development of the learning event.

3.4.4 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: **Lesson**
- Manual: **Section**
- Mentoring: **Mentoring**
- On-the-Job Training (OJT): **Level**
- Performance Support: **Module**
- Workshop: **Workshop**

On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- [Edit](#)⁵⁷ the information (including the title).
- [Print Preview](#)⁶⁶ the Instructor Guide, Participant Guide, 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](#)¹¹⁰ to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)⁶⁶ at every level that lists all resources used or cited anywhere below the selected table of contents item on the Develop tab.
- View the *Objective* information.
- View the [Design Considerations](#)⁵⁷ 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.

3.4.5 Overview/Summary

Underneath the [Terminal Objective Level](#)⁵⁷ you will see an *Overview* folder prior to the [Enabling Objective Level\(s\)](#)⁵⁸ 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.

On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- [Edit](#)⁵⁷ the information (including the title).
- Add a New [element](#)⁵⁹ (heading).
- [Resequence](#)¹⁰⁰ the items below the selected item in the tree structure.
- Select [Explain Flag](#)¹¹⁰ to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)⁶⁶ at every level that lists all resources used or cited anywhere below the selected table of contents item on the Develop tab.
- View the [Design Considerations](#)⁵⁷ at every level that gather information about the table of contents item to help with the development of the learning event.

3.4.6 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**

On this screen, you can:

- View the table of contents item by clicking on the relevant folder.
- [Edit](#)⁵⁸ the information (including the title).
- Add New [elements](#)⁵⁹ that will contain the content in [Pages or Paragraphs](#)⁶⁰ and provide notes, cautions, or warnings, as well as [test items](#)⁶² for the *Practice* or *Assessment* elements.
- [Resequence](#)¹⁰⁰ the elements below the selected item in the tree structure.
- [Print Preview](#)⁶⁶ the Instructor Guide, Participant Guide, 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](#)¹¹⁰ to review the reasons the table of contents item has been flagged.
- View the [Cited Resources](#)⁶⁶ at every level that lists all resources used or cited anywhere below the selected table of contents item on the Develop tab.
- View the *Objective* information.
- View the [Design Considerations](#)⁵⁸ 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 enabling objective level is based on.

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

- a [Sheets](#)⁶¹ 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](#)⁶² that will be included in the Instructor Guide.
- an *Assessment* element (if required) for graded [test items](#)⁶² that will be included in any [assessment](#)⁵³ that tests the EO (and not included in the Instructor Guide, though information about the assessment itself will be 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](#)⁶⁴ for that particular element, page, paragraph, notes, cautions, or warnings.

3.4.7 Elements

Elements are the major headings for your content. There are predefined elements for the [Front Matter](#)⁵⁵ of the instructor and participant guides. You can create elements for the [Overview and Summary](#)⁵⁷ folders underneath the [Terminal Objective Level](#)⁵⁷ and underneath the [Enabling Objective Level](#)⁵⁸. Once you have selected an element, you can:

- *View/Edit* the element title and type.
- Add a New [page or paragraph](#)⁶⁰ (and convert either one to a note, caution, or warning), or [test item](#)⁶² for the *Practice* or *Assessment* elements.
- [Resequence](#)¹⁰⁰ the pages, paragraphs, notes, cautions, or warnings) underneath the element.
- Select [Show History](#)¹⁰⁰ to review the changes made to the element.
- *Delete* a selected element.
Note: You cannot delete a required element under the *Enabling Objective Level*.
- Select [Explain Flag](#)¹¹⁰ to review the reasons the element item has been flagged.
- *View/Edit* the [Storyboard](#)⁶⁴ for the element.
- View the [Design Considerations](#)⁵⁹.

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

- *View* the title and contents by selecting the page or paragraph.
- *Edit* the title and type.
- *View/Edit* the [Storyboard](#)⁶⁴ for the page or paragraph.
- *Copy/Paste* a selected page or paragraph.
- View the [Design Considerations](#)⁶⁰.
- Select [Show History](#)¹⁰⁰ to review the changes made to the page or paragraph.
- *Delete* a selected page or paragraph (including all the content it contains).
- Select [Explain Flag](#)¹¹⁰ to review the reasons the selected page or paragraph has been flagged.
- Add a [Text](#)⁶⁵ 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](#)⁶⁵ entry.

- View or download a *Resource* entry, if a link is shown and you have the correct software available.
- Add a [Sheet](#)⁶⁶ entry (for Enabling Objective Level page or paragraph only).
- Select [Explain Flag](#)¹¹⁰ to review the reasons the selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Sheet* entry has been flagged.
- Edit a selected [Text](#), [Note](#), [Caution](#), [Warning](#)⁶⁵, [Resource](#)⁶⁵, or [Sheet](#)⁶⁶ entry.
- Delete a selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Sheet* entry.
- 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.

3.4.8 Sheets

Sheets are the handouts to the participants that are collated into the *Participant Guide*. You create Sheets by selecting the *Sheets* folder underneath the [Enabling Objective Level](#)⁵⁸ and then *New*. A sheet can be cited in a [Page or Paragraph](#)⁶⁰ underneath an element of the same *Enabling Objective Level* that contains the sheet to provide the instructor or participant information about how and when to use the sheet.

To print Sheets, go to the *Enabling Objective Level* entries (i.e., Sections), *Terminal Objective Level* entries (i.e., Lessons), *Module Level* entries, or the *Course Level* and select *Print Preview*.

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

To copy and paste a sheet from one *Enabling Objective Level* to another *Enabling Objective 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.

On the Sheets screens, you can:

- Add [New](#)⁶¹ sheet.
- [Resequence](#)¹⁰⁰ the sheets to change the order in which they are printed in the Participant Guide.
- Select [Explain Flag](#)¹¹⁰ to review the reasons a Sheet has been flagged.
- View a selected sheet.
- Select [Show History](#)¹⁰⁰ to review the changes made to a sheet.

- *Delete* a selected sheet.
Note: You cannot delete a sheet that is cited or references in an entry under a *Page* or *Paragraph*.
- Select [Explain Flag](#)¹¹⁰ to review the reasons the sheet has been flagged.

Expanding the *Sheets* folder shows the existing sheets. Once you've selected a sheet, you can:

- View/[Edit](#)⁶¹ the sheet title.
- Add a [Text](#)⁶⁵ entry to a selected tab (heading).
- Convert a *Text* entry to a *Note*, *Caution*, *Warning* entry (if you do not need a note, caution, or warning at the page or paragraph level).
- Add a [Resource](#)⁶⁵ entry to a selected tab (heading).
- View or download a *Resource* entry, if a link is shown and you have the correct software available.
- Add a [Test Item](#)⁶² entry to a selected tab (heading).
- Select [Explain Flag](#)¹¹⁰ to review the reasons an item on the sheet has been flagged.
- *Edit* a selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Test Item* entry.
- *Delete* a selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Test Item* entry.
- *Copy/Paste* a selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Test Item* entry.
- Move a selected *Text*, *Note*, *Caution*, *Warning*, *Resource*, or *Test Item* entry *Up* or *Down* in the list of entries to resequence the list of entries.
- Select [Show History](#)¹⁰⁰ to review the changes made to the sheet.
- *Delete* the selected sheet.

3.4.9 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 the test items for a selected *Practice* element by selecting *Print Preview*.
- Test items created under an *Assessment* element will ONLY output in [Assessments](#)⁶⁸ and Assessment package outputs. You can also preview the test items for a selected *Assessment* element by selecting *Print Preview*.

- Test items created on [Sheets](#)⁶¹ will output in the Participant Guide and answers to those test items will output in the back of the Instructor Guide. You can also preview the test items in the Participant Guide output at the Module, Terminal Objective, and Enabling Objective Levels.

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

- *View/Edit* the practice or assessment title, the sheet information, and the stem(s) of any test items.
- Add a *New* test item.
- Select [Explain Flag](#)¹¹⁰ to review the reasons the test item has been flagged.
- *Edit* a selected test item entry.
- *Delete* a selected test item entry.
- Move a selected test item entry *Up* or *Down* in the list of entries to resequence the list of entries.
- *Copy/Paste* a test item entry.
- Select [Show History](#)¹⁰⁰ 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](#)⁶⁴ for the test item, practice, or assessment element.
- View the [Design Considerations](#)⁵⁹ for the *Enabling Objective Level*.

3.4.9.1 Essay Question

You can create essay question test items on the *Practice* and *Assessment* elements underneath the enabling objective levels, as well as for *Assignment*, *Job*, and *Problem Sheets*.

3.4.9.2 Fill-in-the-Blank

You can create fill-in-the-blank test items on the *Practice* and *Assessment* elements underneath the enabling objective levels, as well as for *Assignment*, *Job*, and *Problem Sheets*.

3.4.9.3 Multiple Choice

You can create multiple-choice test items on the *Practice* and *Assessment* elements underneath the enabling objective levels, as well as for *Assignment*, *Job*, and *Problem Sheets*.

3.4.9.4 Performance Job Sheet

You can create performance job sheets only on the *Assessment* elements underneath the enabling objective level. Performance job sheet test items are **not** available for Practice elements or Sheets.

3.4.9.5 Short Answer

You can create short answer test items on the *Practice* and *Assessment* elements underneath the enabling objective levels, as well as for *Assignment*, *Job*, and *Problem Sheets*.

3.4.9.6 True/False

You can create true/false test items on the *Practice* and *Assessment* elements underneath the enabling objective levels, as well as for *Assignment*, *Job*, and *Problem Sheets*.

3.4.9.7 Two-Column Matching

You can create two-column matching test items on the *Practice* and *Assessment* elements underneath the enabling objective levels, as well as for *Assignment*, *Job*, and *Problem Sheets*.

3.4.10 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:

- Add a [Text](#)⁶⁵ entry to a selected tab (heading).
- Convert a *Text* entry to a *Note*, *Caution*, *Warning* entry.
- Add a [Resource](#)⁶⁵ entry to a selected tab (heading).
- View or download a *Resource* entry, if a link is shown and you have the correct software available.
- Select [Explain Flag](#)¹¹⁰ to review the reasons an item on the storyboard has been flagged.
- *Edit* a selected *Text*, *Note*, *Caution*, *Warning*, or *Resource* entry.
- *Delete* a selected *Text*, *Note*, *Caution*, *Warning*, or *Resource* entry.

- *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.

3.4.11 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*

3.4.12 Adding or Editing a Resource Citation/Entry

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

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

3.4.13 Selecting Resources on the Develop Tab

You see the *Resource Selection* screen, when you select the *Resource* link when adding or editing a resource entry on:

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

- *Test Instructions*

3.4.13.1 Working with IETM Table of Contents

Once you have selected an IETM on the *Resource Selection* screen, the *IETM Selection* screen pops-up. Use the arrows to expand the IETM Table of Contents to the IETM node(s) you want to cite. Once you've made your selection, select *OK* to save it, or select *Cancel* to return to the *Resource Selection* screen.

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

3.4.14 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*

3.4.15 Output Options

You will see the *Output Options* screen in several places:

- When you select *Print Preview* after selecting a table of contents item on the *Develop* tab.
- When you select the *Instructor Guide* or *Participant Guide* under the *Documents* folder on the *Develop* tab and then select *Print Preview*.
- When you select any of the following on the *Implement* tab under the *Printed Guides* or *Training Packages* groups:
 - *Instructor Guide*.
 - *Participant Guide*.
 - *Instructor Guide Package*.
 - *Participant Guide Package*.
 - *ILT Package* - allows you to select the delivery methods of the EO levels for the IG and PG separately.

3.4.16 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*

On this screen:

- Use the *Type* drop-down to limit the list of resources to a specific sub-category, as set up on [Customization](#)¹¹³ 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 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*.
- *Export* a spreadsheet listing all cited resources for the selected table of contents item and all items below it in the tree structure.
- View the different versions of a resource by clicking on the arrow in the first column.
- Select a resource and then:
 - Generate a *Related Materials Report* that lists every place below the selected table of contents item where the selected resource is cited or used.
 - Generate an *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.
 - [Update](#)⁶⁶ 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.

3.4.17 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. On this screen, you can:

- View the assessment information by selecting the assessment.
- [Edit](#)⁶⁸ the information (including the title).
- View the *Objective* information.
- *Export/generate an Assessment Package* containing a preset number of tests and corresponding answer sheets, along with the proctor instructions.
Note: The *Number of Assessment Object Tests* to be generated in the *Assessment Package* can be set on the *Customizations > Configuration* tab.
Note: A *Performance Assessment* will not create multiple versions in the *Assessment Package*.
- View the [Test Design Considerations](#)⁶⁸ at every level that provide information about the table of contents item to help with the development of the learning event.

3.4.18 Documents

Under the *Documents* folder, you have several 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.
- *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.
- *Testing Plan* - a PDF document of the information listed under the *Testing Plan* folder on the *Design* tab.
- *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.
- *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](#)⁶⁶.
- *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](#)⁶⁶.
- *Storyboard* - a PDF document of the table of contents items under the *Curriculum Development* folder on the *Design* tab, along with the elements, sub-elements and any storyboard information that was entered.

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

3.5 Implement

On the *Implement* screen, you can create outputs for a specific initiative. 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](#)⁶⁶.
 - *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](#)⁶⁶.
- 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](#)⁶⁶.
 - *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](#)⁶⁶.

- *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](#)⁶⁶.
- *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.
 - *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.
 - *Testing Plan* - a PDF document of the information listed under the *Testing Plan* folder.
- Management Reports - same output as found on the Analysis and Design tabs.
 - *Skill Hierarchy* - a spreadsheet of the information contained in the *Task Analysis* folders.
 - *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.
- Curriculum Outline Documents - same output as found on the Design tab.
 - *Training Outline* - a spreadsheet listing the table of contents under the *Curriculum Development* folder, along with their status and their objectives.
 - *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.

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](#)⁶⁶ pop-up for you to set as desired.

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.

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. Small arrows in the column header let you know which way the data is currently sorted.

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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 O*NET Tasks, Knowledge, Skills, and Abilities listing, based on the Department of Labor's (DOL) 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.

To make more room to see items in the tree structure, click and drag the bottom right corner of the tree window (or frame). If you need even more space, click on the three-bar icon (hamburger 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 hamburger icon again.

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.



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](#)⁷⁶ - any type of resource that is used up during the delivery of a learning event, e.g., flip chart paper and pens.
- [IETMs](#)⁷⁷ - 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](#)⁷⁸ - 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](#)⁷⁹ - including instructions, manuals, books, articles, websites, and other published materials.
- [Software](#)⁸⁰ - that is needed to deliver or that is used during the learning events, whether used by the instructor, facilitator, or the participant.
- [Tool/Equipment](#)⁸⁰ - 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 [Customization](#)¹¹³ 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. For each consumable, you can:

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

- *Export* a spreadsheet listing all consumable entries with all the details in LEAD for each entry.
- 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](#)⁷⁶ of an approved consumable, which will automatically flag all initiatives and places within those initiatives where the selected consumable is cited or used.
 - Generate a *Related Materials Report* that lists every initiative and place within each initiative where the selected consumable is cited or used.
 - Generate an *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected consumable is cited or used.
 - View the consumable information.
 - View and then [Approve](#)⁷⁶ the consumable.
 - *Edit* the consumable information.
 - Select [Show History](#)¹⁰⁰ 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.

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). For each IETM, you can:

- Add/Import a new IETM by selecting + *New*.
- *Export* a spreadsheet listing all IETM entries with all the details in LEAD for each entry.
- 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](#)⁷⁶ of an approved IETM, which will automatically flag all initiatives and places within those initiatives where the selected IETM is cited or used.
 - Generate a *Related Materials Report* that lists every initiative and place within each initiative where the selected IETM is cited or used.

- Generate an *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected IETM is cited or used, and whether the cited node has been modified or deleted.
- View the [IETM Table of Contents](#)⁶⁶ by selecting *View* in the toolbar.
- View the IETM information by selecting *View* in the *Actions* column.
- View and then [Approve](#)⁷⁷ the IETM by selecting *View* in the *Actions* column and then *Approve*.
- *Edit* the IETM information.
- Select [Show History](#)¹⁰⁰ 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.

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. For each IMM, you can:

- Add a new IMM to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all IMM entries with all the details in LEAD for each entry.
- 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](#)⁷⁶ of an approved IMM, which will automatically flag all initiatives and places within those initiatives where the selected IMM is cited or used.
 - Generate a *Related Materials Report* that lists every initiative and place within each initiative where the selected IMM is cited or used.
 - Generate an *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected IMM is cited or used.
 - View the IMM information.
 - View and then [Approve](#)⁷⁸ the IMM.
 - *Edit* the IMM information, which includes the ability to *Update* the associated file, as long as the IMM is not approved.

- Select [Show History](#)¹⁰⁰ 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.

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). For each publication, you can:

- Add a new publication to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all publication entries with all the details in LEAD for each entry.
- 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](#)⁷⁶ of an approved publication, which will automatically flag all initiatives and places within those initiatives where the selected publication is cited or used.
 - Generate a *Related Materials Report* that lists every initiative and place within each initiative where the selected publication is cited or used.
 - Generate an *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected publication is cited or used.
 - View the publication information.
 - View and then [Approve](#)⁷⁹ the publication.
 - *Edit* the publication information.
 - Select [Show History](#)¹⁰⁰ 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.

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. For each software entry, you can:

- Add a new software to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all software entries with all the details in LEAD for each entry.
- View the different versions of a software by clicking on the arrow in the first column.
- Select a software and then:
 - [Create a New Version](#)⁷⁶ of an approved software, which will automatically flag all initiatives and places within those initiatives where the selected software is cited or used.
 - Generate a *Related Materials Report* that lists every initiative and place within each initiative where the selected software is cited or used.
 - Generate an *Impact Report* that lists every initiative and place within each initiative where *any previous version* of the selected software is cited or used.
 - *View* the software information.
 - *View* and then [Approve](#)⁸⁰ the software.
 - *Edit* the software information.
 - Select [Show History](#)¹⁰⁰ 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.

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. For each tool or piece of equipment, you can:

- Add a new tool or piece of equipment to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all tools and equipment entries with all the details in LEAD for each entry.

- 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](#)⁷⁶ 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.
 - Generate a *Related Materials Report* that lists every initiative and place within each initiative where the selected tool or piece of equipment is cited or used.
 - Generate an *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.
 - View the tool or piece of equipment information.
 - View and then [Approve](#)⁸⁰ the tool or piece of equipment.
 - *Edit* the tool or piece of equipment information.
 - Select [Show History](#)¹⁰⁰ 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.

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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](#)⁸⁴ - create and manage the verbs that are used the task analysis, whose skills form the basis for the learning objectives in LEAD.
- [Conditions](#)⁸⁵ - create and manage the conditions that are used the task analysis, whose skills form the basis for the learning objectives in LEAD.
- [Standards](#)⁸⁵ - create and manage the standards that are used the task analysis, whose skills form the basis for the learning objectives in LEAD.
- [Knowledge](#)⁸⁶ - 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](#)⁸⁶ - 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](#)⁸⁷ - 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](#)⁸⁸ - 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. For each verb, you can:

- Add a new verb to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all verbs entries with all the details in LEAD for each entry.
- Select a verb and then:
 - Generate a *Related Materials* report that lists every initiative and place within the initiatives where the selected verb is cited or used.
 - *View* the verb information.
 - *View* and then *Approve* the verb.
 - *Edit* the verb information.
 - Select [Show History](#)¹⁰⁰ 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.

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. For each condition, you can:

- Add a new condition to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all conditions entries with all the details in LEAD for each entry. Select a condition and then:
 - Generate a *Related Materials* report that lists every initiative and place within the initiatives where the selected condition is cited or used.
 - *View* the condition information.
 - *View* and then *Approve* the condition.
 - *Edit* the condition information.
 - Select [Show History](#)  ¹⁰⁰ 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.

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. For each standard, you can:

- Add a new standard to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all standards entries with all the details in LEAD for each entry.
- Select a standard and then:
 - Generate a *Related Materials* report that lists every initiative and place within the initiatives where the selected standard is cited or used.
 - *View* the standard information.
 - *View* and then *Approve* the standard.
 - *Edit* the standard information.

- Select [Show History](#)¹⁰⁰ 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 has not been cited in the task analysis of any initiative.

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. For each knowledge entry, you can:

- Add a new knowledge entry to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all knowledge entries with all the details in LEAD for each entry.
- Select a knowledge entry and then:
 - Generate a *Related Materials* report that lists every initiative and place within the initiatives where the selected knowledge entry is cited or used.
 - *View* the knowledge entry.
 - *View* and then *Approve* the knowledge entry.
 - *Edit* the knowledge entry.
 - Select [Show History](#)¹⁰⁰ 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.

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. For each skill, you can:

- Add a new skill entry to the existing list by clicking on + *New*.

- *Export* a spreadsheet listing all skills entries with all the details in LEAD for each entry.
- Select a skill entry and then:
 - Generate a *Related Materials* report that lists every initiative and place within the initiatives where the selected skill is cited or used.
 - *View* the skill entry.
 - *View* and then *Approve* the skill entry.
 - *Edit* the skill entry.
 - 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.

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. For each ability entry, you can:

- Add a new ability entry to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all abilities entries with all the details in LEAD for each entry.
- Select an ability entry and then:
 - Generate a *Related Materials* report that lists every initiative and place within the initiatives where the selected ability is cited or used.
 - *View* the ability entry.
 - *View* and then *Approve* the ability entry.
 - *Edit* the ability entry.
 - Select [Show History](#)  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.

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. For each existing intervention, you can:

- Add a new intervention to the existing list by clicking on + *New*.
- *Export* a spreadsheet listing all interventions entries with all the details in LEAD for each entry.
- Select an intervention and then:
 - Generate a *Related Materials* report that lists every initiative and place within the initiatives where the selected intervention is cited or used.
 - *View* the intervention information.
 - *View* and then *Approve* the intervention.
 - *Edit* the intervention information.
 - Select [Show History](#)¹⁰⁰ 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.



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 set as desired. The following reports are available:

- 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 *Initiatives* group:
 - *All Initiatives* - a PDF document listing all initiatives, grouped by Departments and My Initiatives, along with the Initiative State, Start and End Date information.
- 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; when you generate the report, you can choose to select one or more types of users to output:
 - *Active Users*.
 - *Pending Users* - those who have requested an account.
 - *Inactive Users* - those who have not logged in for more than a certain number of days (set by the system administrators).
 - *Locked-Out Users* - those who have entered their password incorrectly too many times.

- *Deleted Users* - those that have been deleted from the system (whose information is retained only to ensure nothing breaks by having no selection for the initiative owner for example).

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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](#)⁹⁴ - create and manage the announcements that show on the login screen.
- [Departments](#)⁹⁵ - create and manage the departments in LEAD.
- [Initiative Locations](#)⁹⁵ - create and manage the learning event initiative locations for use in initiatives.
- [Users](#)⁹⁵ - create and manage the users that have access to LEAD.
- [Roles](#)⁹⁶ - create and manage the roles that determine the privileges users have in LEAD.
- [System Logs](#)⁹⁶ - review and delete system logs.
- [In-Use](#)⁹⁷ - review and reset in-use data.
- [Licensing](#)⁹⁷ - 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.

For each announcement, you can:

- Add a new announcement to the existing list by clicking on the + *New*.
- Select an announcement and then:
 - View the announcement information.
 - *Edit* the announcement information.
 - Select [Show History](#)¹⁰⁰ 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.

8.2 Departments

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

- Add a new department to the existing list by clicking on + *New*.
- Select a department and then:
 - *View* the department information.
 - *Edit* the department information.
 - Select [Show History](#)¹⁰⁰ 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).

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. For each location, you can:

- Add a new location to the existing list by clicking on + *New*.
- Select the location and then:
 - *View* the location information.
 - *Edit* the location information.
 - Select [Show History](#)¹⁰⁰ 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.

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](#)⁹⁵ on the users listed. When you select a user on this screen, you can use the icons in the *Actions* column to:

- *View* the user information.
- *Edit* the user information.
- Select [Show History](#)¹⁰⁰ 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](#)⁹⁵ screen. Initiatives have their own privileges that you can set for each user. For each role, 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](#)¹⁰⁰ 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.

Note: The *Customizer* role that you can assign on the *User* screen is a LEAD system role, which cannot be edited. Likewise, you cannot add privileges for the *Customizations* screens on the *Roles* screen.

8.6 System Logs

On the *System Logs* screen, you can review, export, and delete system logs that are automatically generated 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.

On this screen you can:

- *Export*/generate all system log entries to a spreadsheet for off-line review.
- [Delete](#)⁹⁶ system log entries.

- Select a system log entry and [View](#)⁹⁶ 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 edit, 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.

Prior to resetting something that is listed on this screen, we recommend that you first verify that the user that has locked the item in question is not currently logged into LEAD by going to the *Admin > Users* screen (Using the *Currently Logged In Users* filter), to prevent loss of data.

Deleting older in-use items typically will not cause any problems.

8.8 Licensing

On the *Licensing* screen, you can review your existing license for LEAD and add a new license when needed. For each license, 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](#)¹⁰⁰ 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. Small arrows in the column header let you know which way the data is currently sorted.

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Common Actions

9 Common Actions

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

- [Reviewing the History](#)¹⁰⁰ of an item and possibly reverting to an earlier revision/saved version of that item.
- [Resequencing Items](#)¹⁰⁰ on the screen, including item that are in a tree structure.
- [Selecting Resources](#)¹⁰¹ for the TNA, TMD, and skills.
- [Using the Text Editor](#)¹⁰¹.
- [Working with Business Rules](#)¹⁰⁹.
- [Working with Flags](#)¹¹⁰.

9.1 Reviewing History

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

9.2 Resequencing Items

Any time you see *Resequencing*, 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.

You can also use the *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 Selecting Resources for the TNA, TMD, and Skills

[Resources](#)⁷⁶ need to be created on the *Resources* tab, before they can be selected on the *Resource Selection* screen. On that screen:




- 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 *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.







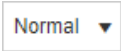
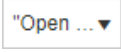






9.4 Using the Text Editor

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.	
	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: <ul style="list-style-type: none">• Paste from Word button - Pastes content copied from Word and removes the web-unfriendly tags.• Paste from Word, strip font button - cleans all Word-specific tags and removes font names and text sizes.• Paste Plain Text button - Pastes plain text (no formatting) into the editor.• Paste as HTML button - Pastes HTML code in the content area and keeps all the HTML tags.• Paste HTML button - 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.



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](#)¹⁰⁵ link has more options to configure a table.
- Insert Row Above button - inserts a row above the selected row.
- Insert Row Below button - inserts a row below the selected row.
- Delete Row button - deletes the current selected row.
- Insert Column to the Left button - inserts a column to the left of the selected column.
- Insert Column to the Right button - inserts a column to the right of the selected column.
- Delete Column button - deletes the current selected column.
- Merge Cells Horizontally button - merges the selected cell with the cell to the right.
- Merge Cells Vertically button - merges the selected cell with the cell below.
- Split Cell Horizontally button - splits the selected cell into two cells side by side.
- Split Cell Vertically button - splits the selected cell into two cells one above the other.
- Delete Cell button - deletes the current selected cell.

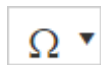
- Table Properties button - also opens the [Table Wizard](#)¹⁰⁵ for options to configure the selected table.



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.

9.4.1 Table Wizard

The Table Wizard provides advanced features for creating and customizing tables in the editor's content area. The Table Wizard is a dialog with tabs for detailed table design: **Table Design**, **Table Properties**, **Cell Properties**, and **Accessibility**. You can open the Table Wizard by using the **Insert Table Dropdown**.

Table Design

This tab allows you to adjust the number of rows and columns as well as adjust the row and column span. You can also configure table dimensions and layout by setting one or more of the following table properties:

- **Width/Height** - Specifies the height and the width of the table (in pixels or percent).
- **Cell Spacing** - Increases or decreases the space between the borders of the cells.
- **Cell Padding** - Increases or decreases the space between the content and the border of a cell.
- **Alignment** - Aligns the table to the left, center, or right side of the page.
- **Back Color** - Sets the background color of the table.
- **CSS Class** - Specifies table CSS class and style. This property should be used only by advanced users.
- **Back Image** - Sets an image as the table background.
- **More Table Styling** - Open the style builder dialog.

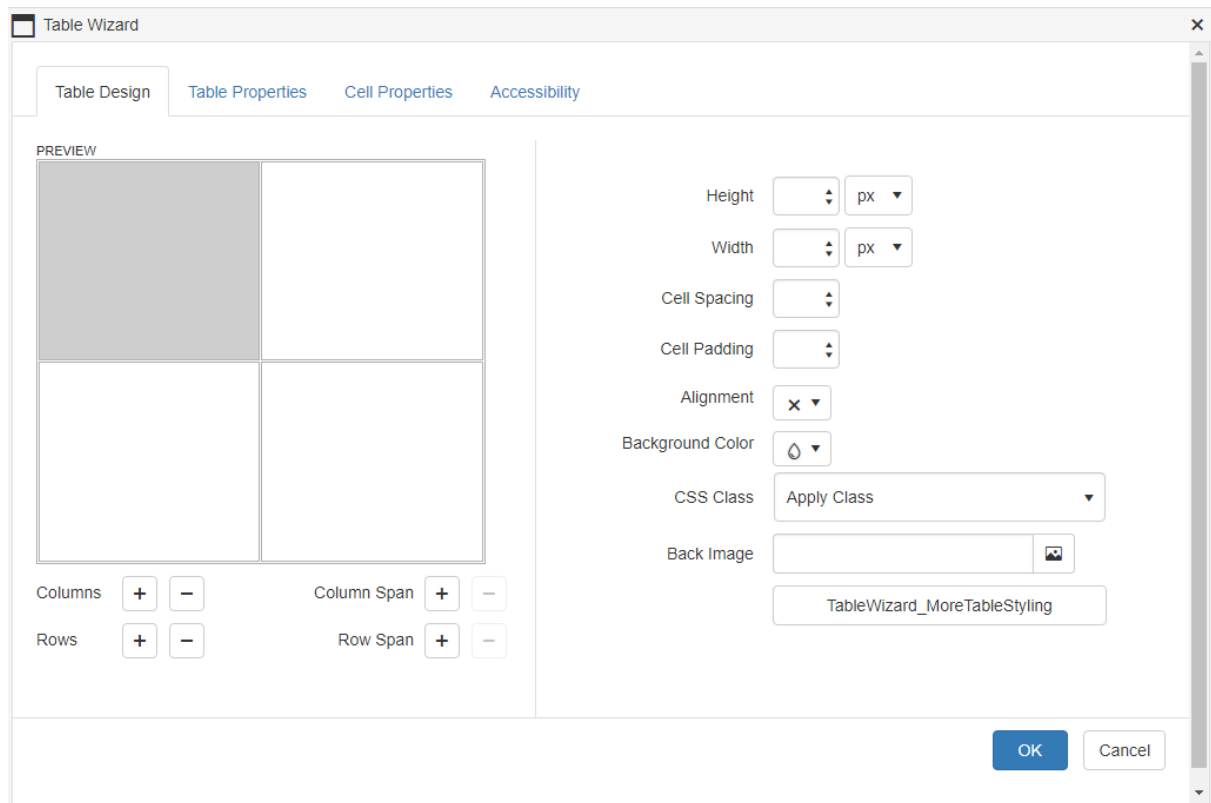


Table Design tab of the Table Wizard

Table Properties

You can select a particular predefined layout for the table and apply special formats to the heading/last row and first/last column.

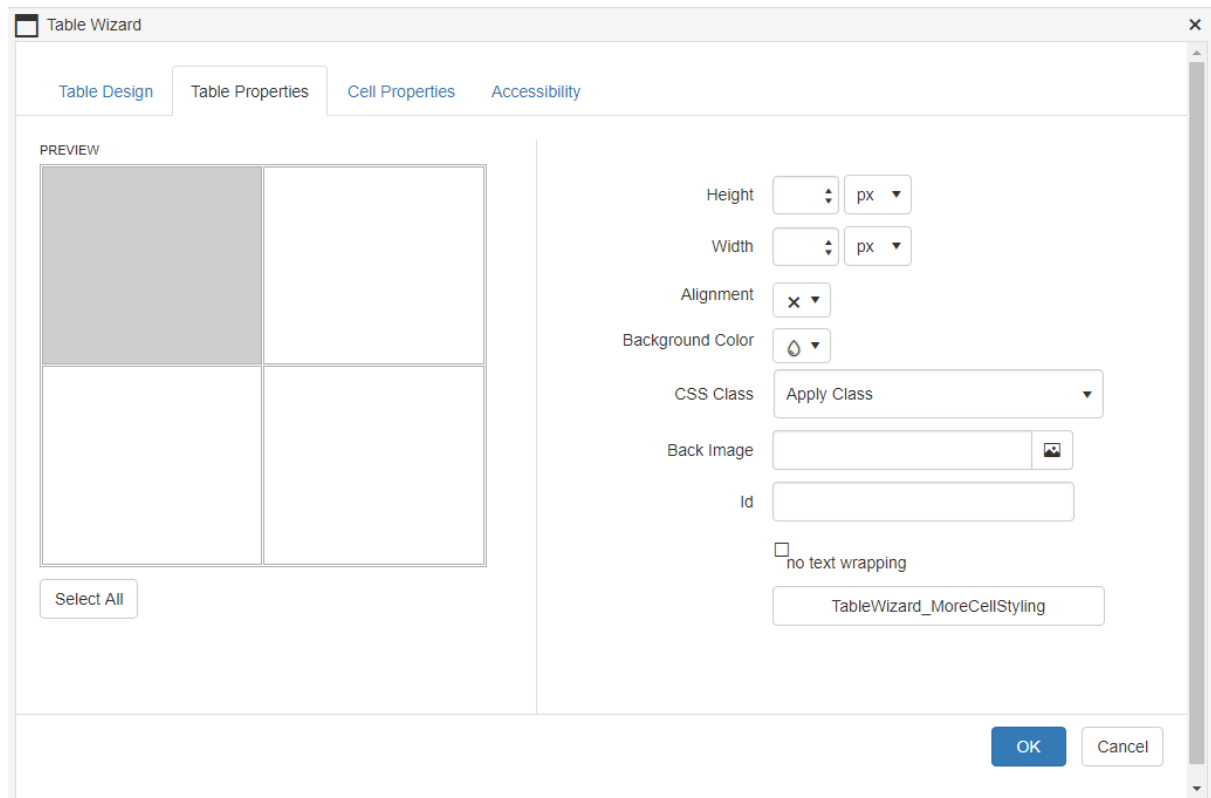
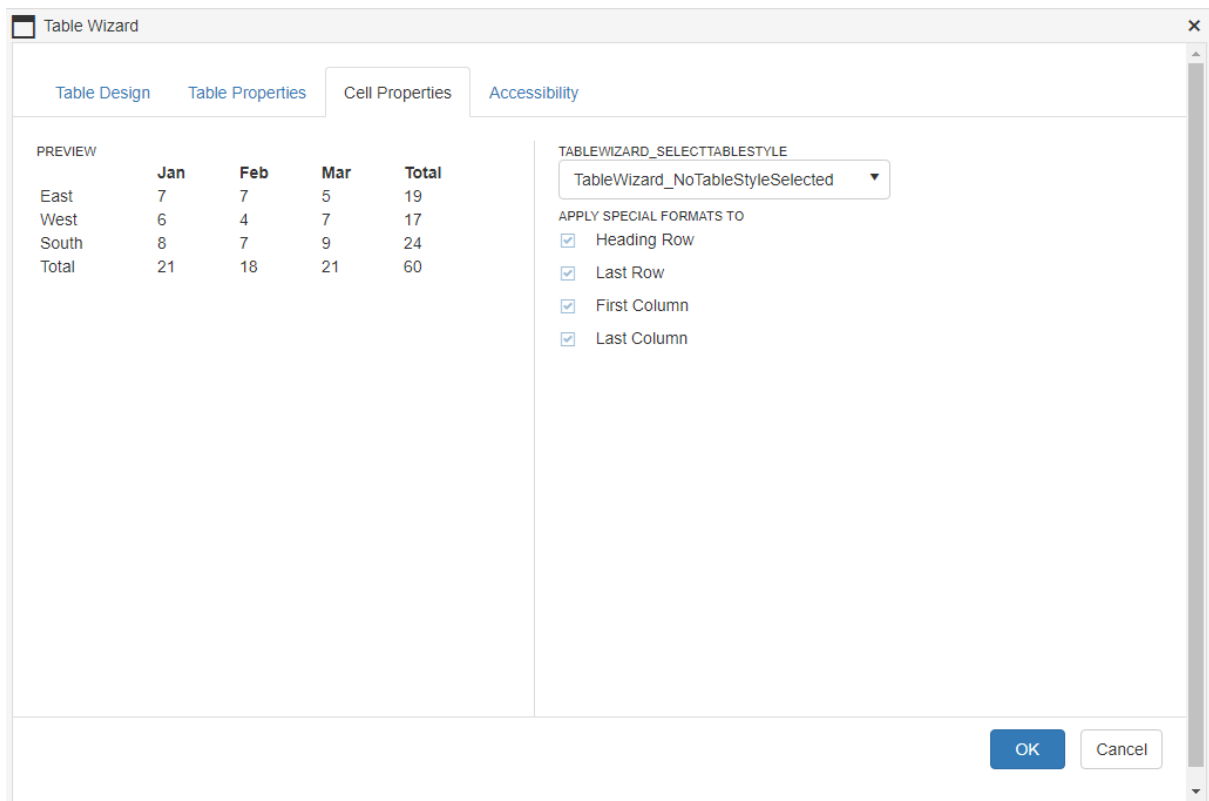


Table Properties tab of the Table Wizard

Cell Properties

The *Cell Properties* tab allows you to fine-tune the appearance of individual cells of a given table. Here you can configure cell width, height, alignment, background, the cell ID, toggle text wrapping and set the CSS class for a given cell.



Cell Properties tab of the Table Wizard

Accessibility

The *Accessibility* tab allows you to adjust the number of heading rows and columns, add caption settings and a summary, and a checkbox to associate cells with the headers.

Accessibility tab of the Table Wizard

9.5 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](#)¹¹⁸ 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.

9.6 Working with Flags

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



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 [Lists](#)¹¹³ :
 - [Resource Sub-Categories](#)¹¹³ - to manage the resource sub-categories.
 - [Proficiency Levels](#)¹¹⁴ - 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](#)¹¹⁵ - 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](#)¹¹⁶ - to manage the events that can be chosen for a schedule in the *Training Management Document* on the *Design* tab of any initiative.
 - [Before Text](#)¹¹⁶ - to manage the options that display before a resource on the *Develop* tab of any initiative.
 - [Intervention Types](#)¹¹⁷ - to manage the options that display on the *Type* drop-down on the *Library > Interventions* screen.
 - [Status of Training](#)¹¹⁷ - 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](#)¹¹⁷ - 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](#)¹¹⁸ - to manage what shows on the *Test Item Delivery* drop-down on the test item editing screen on the *Initiatives > Develop* tab.
- [Business Rules](#)¹¹⁸ - to manage the business rules that apply when you change the *Status* of an item.
- [Configuration](#)¹¹⁹ - to manage admin settings.
- [Default Text](#)¹¹⁹ - 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*](#)¹¹³ - to manage the resource sub-categories.
- [*Proficiency Levels*](#)¹¹⁴ - 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*](#)¹¹⁵ - 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*](#)¹¹⁶ - to manage the events that can be chosen for a schedule in the *Training Management Document* on the *Design* tab of any initiative.
- [*Before Text*](#)¹¹⁶ - to manage the options that display before a resource on the *Develop* tab of any initiative.
- [*Intervention Types*](#)¹¹⁷ - to manage the options that display on the *Type* drop-down on the *Library > Interventions* screen.
- [*Status of Training*](#)¹¹⁷ - 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*](#)¹¹⁷ - 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*](#)¹¹⁸ - 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. For each of the categories, you can:

- Add a new entry to the existing list by selecting + *New*.
- Select an entry and then:
 - 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.

10.1.2 Proficiency Levels

On the *Proficiency Levels* screens, you can customize what shows on the **Proficiency Level** drop-down on the *Task*, *Subtask*, of *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.

For each of the learning domains, you can:

- Add a new entry to the existing list by selecting + *New*.
- Select an entry and then:
 - View the entry information.
 - *Edit* the entry information.

- Select [Show History](#)¹⁰⁰ 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.

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. For each of the categories, you can:

- Add a new entry to the existing list by selecting + *New*.
- Select an entry and then:
 - View the entry information.
 - *Edit* the entry information.
 - Select [Show History](#)¹⁰⁰ 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.

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.


For each of the schedule event types, you can:

- Add a new entry to the existing list by selecting + *New*.
- Select an entry and then:
 - *View* the entry information.
 - *Edit* the entry information.
 - Select [Show History](#)¹⁰⁰ 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.

10.1.5 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. You can:

- Add a new entry to the existing list by selecting + *New*.
- Select an entry and then:
 - *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.


10.1.6 Intervention Types

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

- Add a new entry to the existing list by selecting + *New*.
- Select an entry and then:
 - *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.

10.1.7 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. You can:

- Add a new entry to the existing list by selecting + *New*.
- Select an entry and then:
 - *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.

10.1.8 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. You can:


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

- Select an entry and then:
 - 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.

10.1.9 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.

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

- Add a new entry to the existing list by selecting + *New*.
- Select an entry and then:
 - 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.

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.

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

- *View* the business rule.
- *Edit* the business rule.

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

- *View* the entry information.
- *Edit* the configuration entry.
- Select [Show History](#)¹⁰⁰ 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 default text that displays for the standard system email messages, as well as the following:

- 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.

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](#)¹⁰⁰ 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.

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