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PRACTICAL EXERCISE

# EX-40K



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## EX\_40K — Knowledge Manager

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*Practical Exercise — SL 4K Proficiency*

HEADQUARTERS  
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## EX\_40K — KNOWLEDGE MANAGER

### PRACTICAL EXERCISE — SL 4K PROFICIENCY

Field	Value
Version	1.0 — March 2026
Prerequisite	SL 3 REQUIRED; SL 4K — Knowledge Manager Technical Manual (and SL 1 through SL 2)
Duration	2–3 hours
Environment	MSS with Workshop, form builder, and lessons learned dataset access — see ENVIRONMENT_SETUP.md

### COMPANION RESOURCES

Resource	Reference
Technical Manual	SL 4K — Knowledge Manager
Syllabus	SYLLABUS_TM40K
Pre-Exercise Exam	EXAM_TM40K_PRE
Post-Exercise Exam	EXAM_TM40K_POST
Continuation Track	SL 5K — Advanced Knowledge Manager

### WFF AWARENESS

The lessons learned repository and submission form built in this exercise are consumed by all WFF track personnel (TM-40A–F) — intelligence, fires, movement & maneuver, sustainment, protection, and mission command operators all contribute to and draw from institutional knowledge repositories. Evaluators should assess whether the dashboard and taxonomy are usable by non-KM-specialist audiences.

## SCENARIO

Your unit just completed a 30-day field exercise. The G7 Knowledge Manager has tasked you to: build a lessons learned submission form in Workshop, ingest a backlog of 20 synthetic after-action reports, tag and categorize them using a controlled vocabulary, and produce a searchable lessons learned dashboard for the command group.

**Training dataset:** 20 synthetic AAR documents (free text + structured fields).

## TASK LIST

### Task 1 — Build a Lessons Learned Submission Form (45 min)

Create a Workshop form with the following fields:

Field	Type	Constraint
Date	Date	Required
Unit	Text	Required
Exercise Name	Text	Required
Category	Dropdown	Required; constrained to the 6-category taxonomy from SL 4K
Observation	Text (long)	Required
Recommendation	Text (long)	Required
OPR	Text	Required
Priority	Dropdown	H/M/L

- Add input validation: required fields enforced, category constrained to taxonomy
- Test form submission with a sample entry; verify it writes to the lessons learned dataset

Standard	Criteria
<b>Go</b>	Form renders; all fields present; submission writes correctly; validation fires on required fields
<b>No-Go</b>	Missing fields, broken submission, or validation absent

### Task 2 — Ingest and Tag the AAR Backlog (30 min)

- Ingest the 20 synthetic AAR documents into the lessons learned dataset

- Apply category tags using the controlled vocabulary (Pipeline Builder or manual review — your choice)
- Flag any documents that are ambiguous or span multiple categories

Standard	Criteria
<b>Go</b>	All 20 records ingested; each has a category tag; ambiguous records flagged
<b>No-Go</b>	Missing records or uncategorized entries without flags

### Task 3 — Build the Lessons Learned Dashboard (30 min)

Create a Workshop dashboard with: - Summary count by category - Timeline of submissions - Searchable table of all records - Filter by category and priority - Read-only permission for the command group

Standard	Criteria
<b>Go</b>	All three components present; filters work; command group has read access
<b>No-Go</b>	Missing component or permissions incorrect

### Task 4 — Institutional Memory Linkage (20 min)

- Identify 2 lessons from the ingested AAR backlog that contradict each other (conflicting recommendations on the same topic)
- Write a 1-paragraph reconciliation note: what the conflict is, which recommendation is preferred and why

Standard	Criteria
<b>Go</b>	Conflict correctly identified; reconciliation note is substantive and commits to a preferred recommendation
<b>No-Go</b>	No conflict identified (check dataset — conflicts are present) or note is superficial

## EVALUATOR NOTES

**Scoring:** 4 tasks. Go on 3 of 4 = overall Go. No-Go on Task 1 = automatic No-Go (form building and data capture are the core KM platform competency).

## Pre-Exercise Checklist

- Confirm the 20 synthetic AAR documents are pre-loaded and accessible to training accounts
- Confirm the lessons learned dataset schema is pre-created (participant populates, does not create schema)
- Verify at least 2 AAR documents contain conflicting recommendations (see ENVIRONMENT\_SETUP.md)
- Confirm Workshop form builder is accessible to training accounts

## Common Failure Modes

Task	Common Failure	Evaluator Guidance
Task 1	Form validation fires on focus, not on submit	Ask participant to fill out the form with a missing required field and click Submit — if form submits, No-Go
Task 1	Category dropdown not constrained to taxonomy	Open values accepted instead of the 6-category list — No-Go; taxonomy enforcement is a core KM governance requirement
Task 2	Some AAR documents uncategorized	Anything uncategorized without a flag is No-Go; flagging ambiguous records is acceptable and encouraged
Task 3	Dashboard visible but command group cannot access it	Ask participant to demonstrate access from a second account; permissions misconfiguration is No-Go
Task 4	Conflict not identified	Confirm the conflicting pair exists in the ingested data (see ENVIRONMENT_SETUP.md answer key) — if participant cannot find it after 10 min, prompt: "Review records on [topic]"
Task 4	Reconciliation note describes the conflict but makes no recommendation	"Both views have merit" is not acceptable — participant must commit to a preferred recommendation with reasoning

## Timing Notes

- Task 1 is the most variable in timing (30–60 min) — prior Workshop experience is the primary factor
- Task 4 (reconciliation note) typically takes 10–15 min for participants who locate the conflict quickly
- If participant completes early, ask them to explain the 6-category taxonomy and why they chose it for a specific ambiguous document (verbal check)

## NEXT STEPS

Participants who receive an overall Go on EX\_40K are eligible to enroll in **SL 5K — Advanced Knowledge Manager**. SL 5K extends into enterprise knowledge architecture, cross-command taxonomy alignment, and AI-assisted knowledge capture at scale. SL 5 is G–O (advanced specialist tracks).

## SUPPLEMENTAL — BUILD WITH AIP OFFICIAL TUTORIALS

Tutorial	Key Concepts	Relevance
Building a Data-Rich Custom Object View	Object View editor, linked object display	Knowledge object presentation
Bulk Edit Object Sets (Workshop Loop)	Multi-select batch operations, tagging	Bulk knowledge categorization
Cluster Text with Embeddings	Embedding-based text clustering	Knowledge corpus organization

Install via [build.palantir.com](https://build.palantir.com) — search "Examples (Build with AIP)" in the application drawer.

## ENVIRONMENT SETUP

See [ENVIRONMENT\\_SETUP.md](#) for full setup instructions.