4/2022 = The original training document is over 50 pages long.

This sample has been shortened, edited, and parts have been redacted.

Table of Contents

Section 1: CQ5 and Driving Content

Adobe CQ5* is geared specifically for large companies and corporations with substantial, and often global, infrastructures. It combines web content management, Digital Asset Management (DAM), and social collaboration to deliver a solution that allows large companies to manage incredible amounts of information, multiple internal and external websites, a myriad of media assets, and detailed workflow.
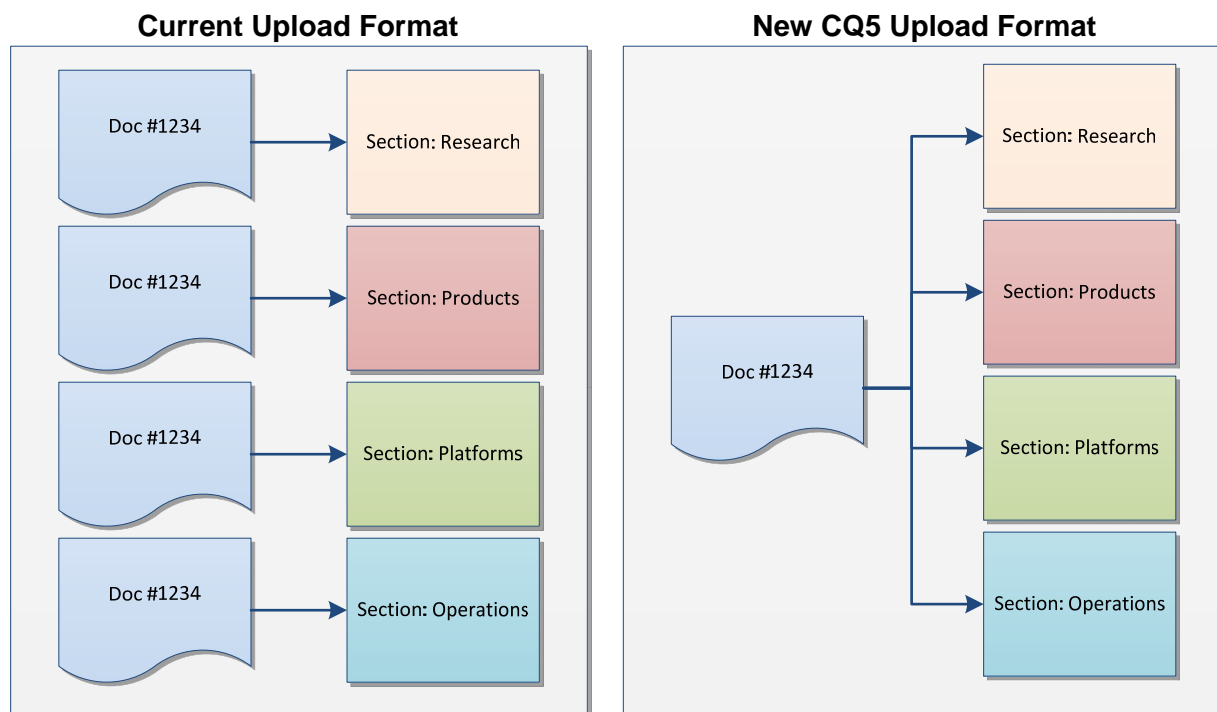
Key Benefits
- Substantial reduction in organizational training costs
- Significant control over brand presentation
- The reuse of templates and components while maintaining a unique look and feel. (Adobe also contributes significant resources to the open source community, with over 12 Apache and 25 open source projects currently underway.)

A few notable companies that use the Adobe CQ5 platform include General Motors, McDonald's, Volkswagen, Audi, and NBC Universal.

Source: http://websmart.tv/learn/what-is-adobe-cq5/

CQ5 is the backend of the new Resource Center (RC). It drives content in a one-to-many format vs. the existing many-to-many format.

Current Upload Format

Doc #1234 → Section: Research

Doc #1234 → Section: Products

Doc #1234 → Section: Platforms

Doc #1234 → Section: Operations

New CQ5 Upload Format

Doc #1234 →
Section: Research
Section: Products
Section: Platforms
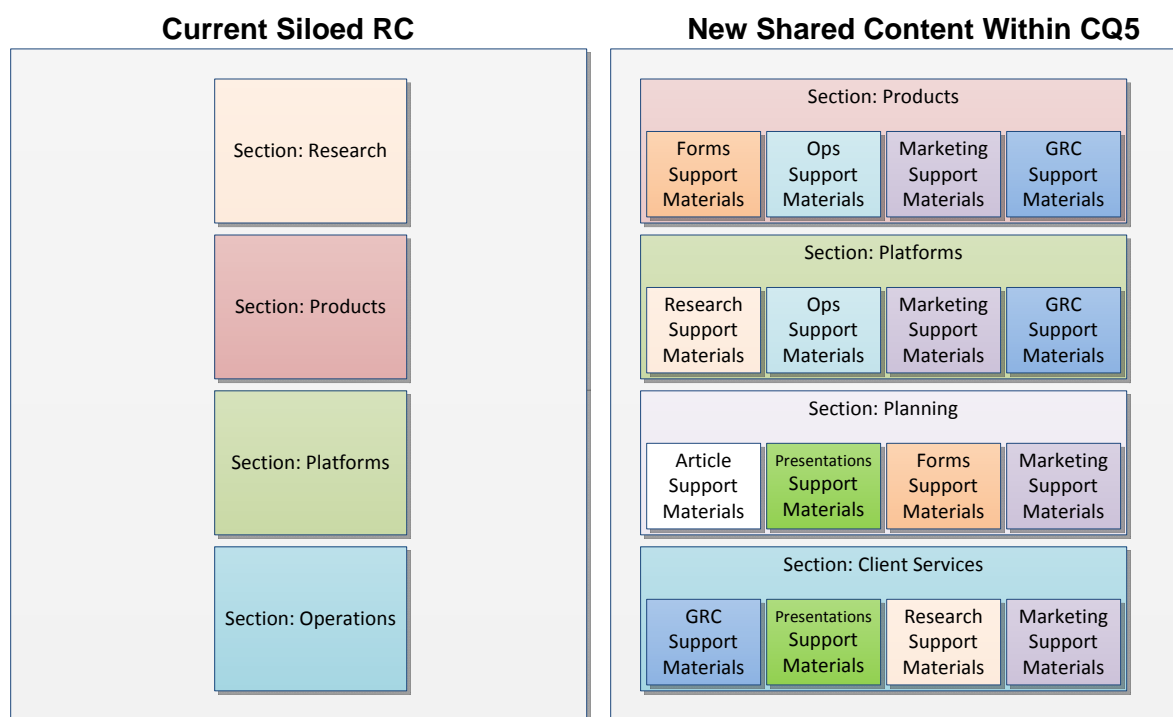Section: Operations

Section 2: New System Content

The new RC gives business units the opportunity to display content in a meaningful way to our advisors and brokers. By allowing business units to use their information to serve products, platforms, and services holistically,   can support advisors and brokers with their businesses in a more efficient and cohesive way.

Content properly segmented and supported by CQ5:
- Findable
- Viewable
- Shareable

Current Siloed RC

| Section: Research |
| Section: Products |
| Section: Platforms |
| Section: Operations |

New Shared Content Within CQ5

Section: Products

| Forms Support Materials | Ops Support Materials | Marketing Support Materials | GRC Support Materials |

Section: Platforms

| Research Support Materials | Ops Support Materials | Marketing Support Materials | GRC Support Materials |

Section: Planning

| Article Support Materials | Presentations Support Materials | Forms Support Materials | Marketing Support Materials |

Section: Client Services

| GRC Support Materials | Presentations Support Materials | Research Support Materials | Marketing Support Materials |

Section 3a: Glossary of Terms – Aggregation Page

Aggregation Page
- An Aggregation page is a main topic page
  - It usually contains:
    - 9 main topic boxes
    - Anywhere from 1 to 6 tabs with additionally tagged items related to the page's main topic
    - Up to 8 items within each of the tabs that form a Tab Carousel (see page 16 for the definition)

Section 3b: Glossary of Terms – Website Areas

- Global Header
  - RC Logo
  - Search Bar
  - Mega Menu
  - Forms Icon
- Tile Carousel
  - Graphic Images
  - Direct Links to Content
- Popular Topics
  - Most Popular Topics Carousel
  - Key Sections and Resources
- Tab Carousel
 - Additional Tagged Items
- Global Footer
  - Contact Us
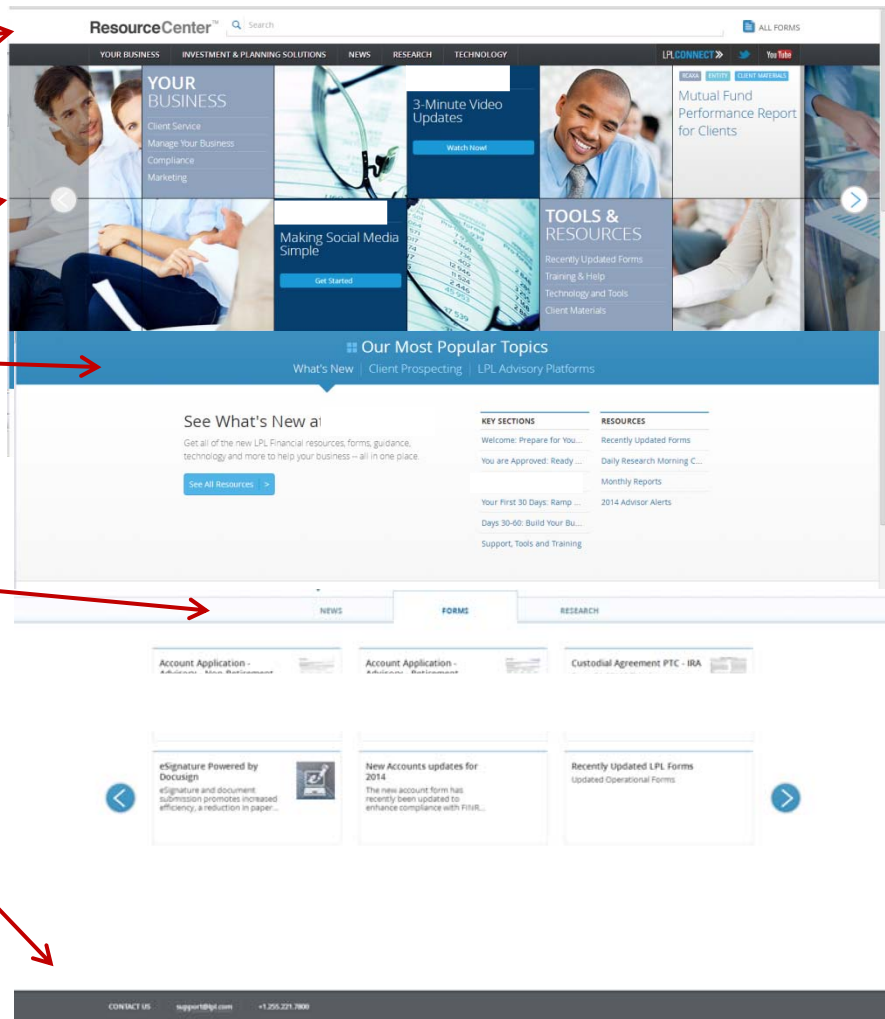
Section 3c: Glossary of Terms – Author Site

Author site is also called CQ5 - this is the where content is added to the new RC.
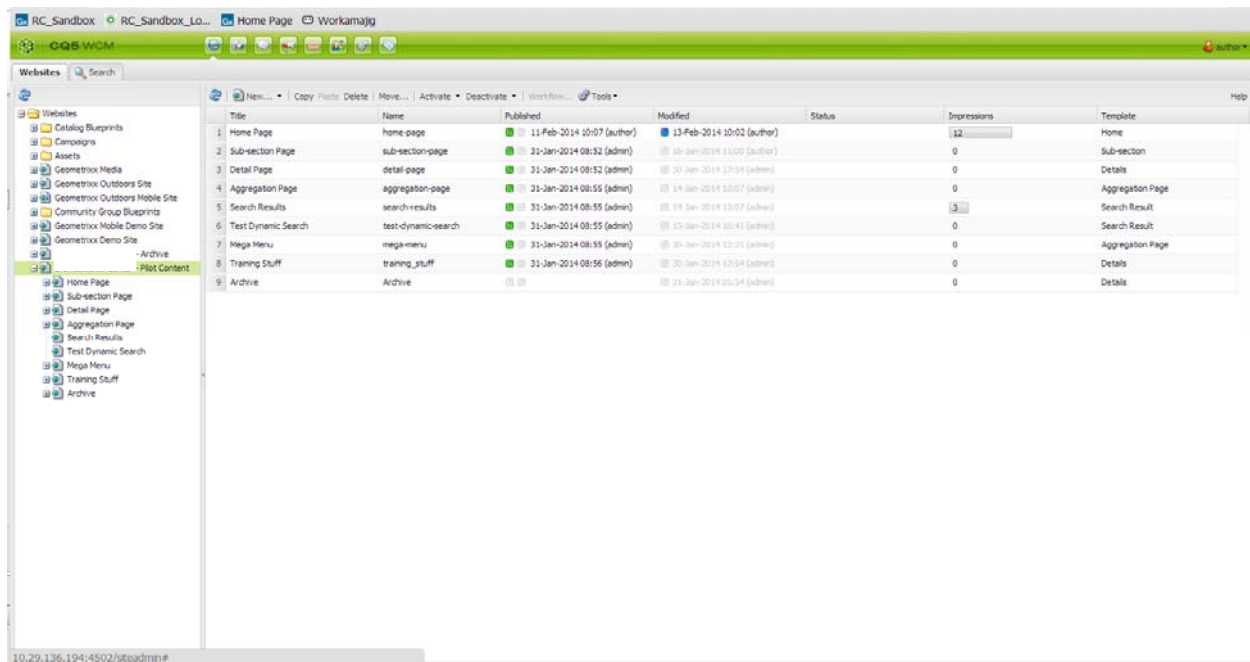
Section 3d: Glossary of Terms – Detail Page

- A Detail page is the final page where a user can view the document for which they were searching.
- On a Detail page, a user has the ability to (dependent on various factors):
    - Print
    - Download
    - Email (pending)
    - View
        - Overview
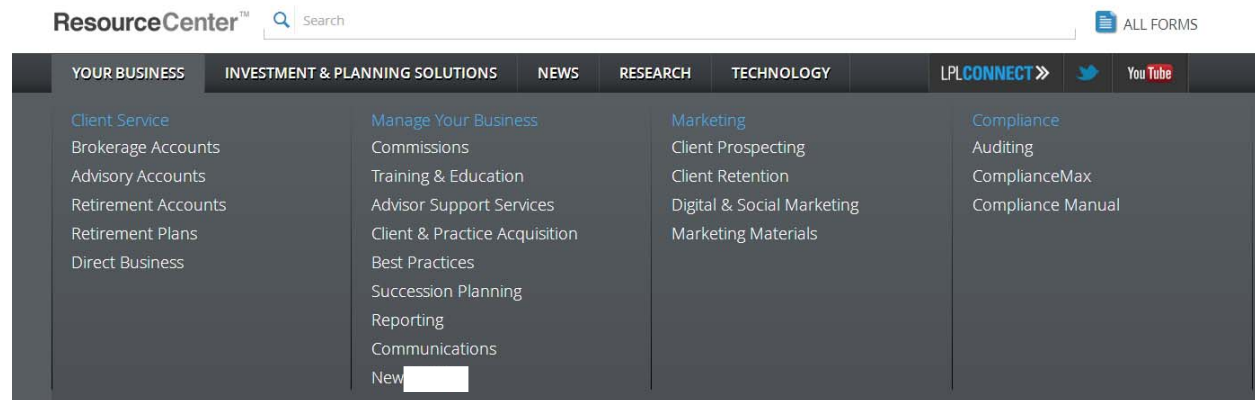   - Keywords
        - Related Articles
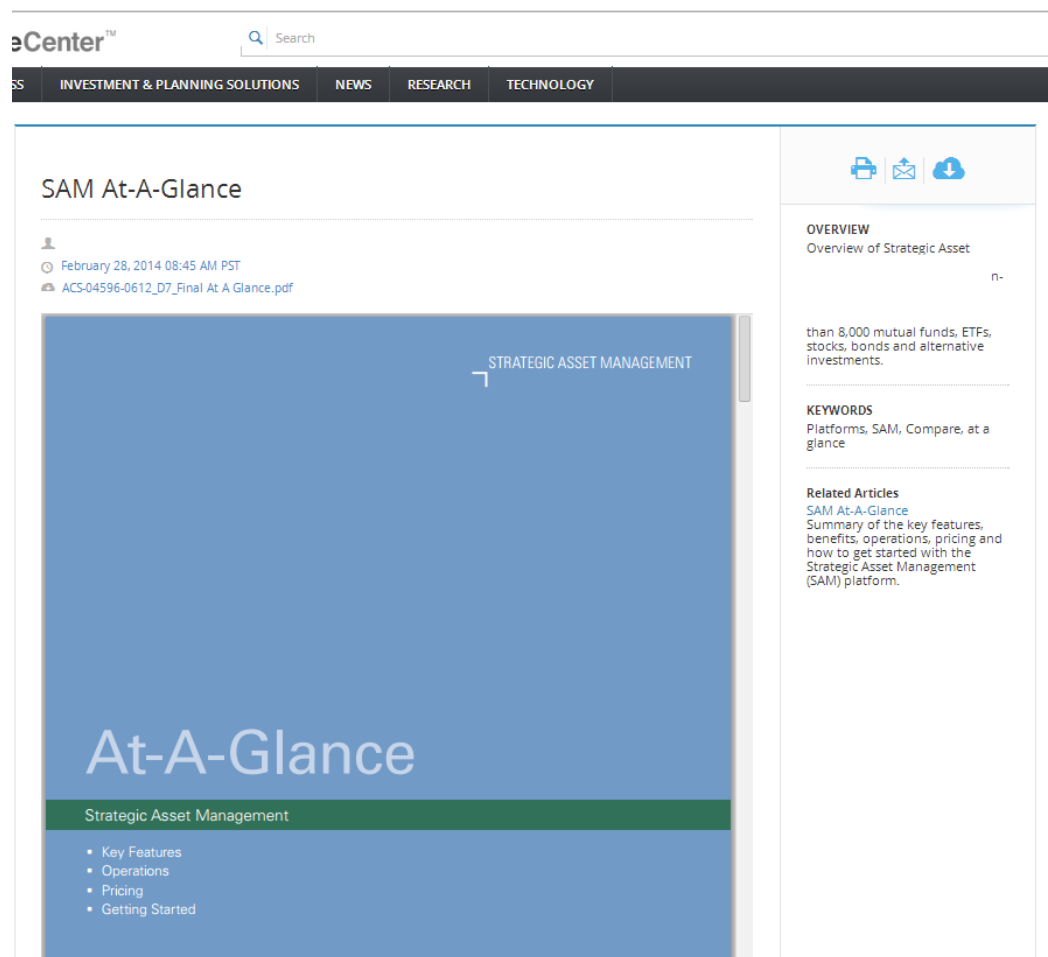
Section 3e: Glossary of Terms – Keywords

- Keywords are most often added to a Detail page. These words (and sometimes short phrases) are essential when using the Search option, and help guide users of the RC to your content.
  - Great Keyword Examples
    - F138
    - 401k
    - Retirement
    - Custodial Agreement
  - Misleading Keyword Examples
    - Form
    - Advisory
    - Overview
  - Commonly Used Search Terms and Keywords (in the current Resource Center) Examples
    - form, fr120, account, ai1, f2, f1bn, f1br, of, f38, f450, ira, is, fr121, fee , rmd, fr140, fr141, change, f425, 2014, annuity, letter, f443

Section 3f: Glossary of Terms – Mega Menu

- A Mega Menu is a menu, usually at the top of a website that displays categorized navigation by tiers.
  - In the new RC, the Mega Menu has 5 top tier categories followed by blue sub-navigation and all supporting sub-categories.
  - If a content piece isn't attached to a category within the Mega Menu, it cannot be found in the new RC easily.

ResourceCenter™   🔍 Search   📄 ALL FORMS

YOUR BUSINESS	INVESTMENT & PLANNING SOLUTIONS	NEWS	RESEARCH	TECHNOLOGY		LPLCONNECT » 🐦 ▶️ You Tube

Client Service	Manage Your Business	Marketing	Compliance
Brokerage Accounts	Commissions	Client Prospecting	Auditing
Advisory Accounts	Training & Education	Client Retention	ComplianceMax
Retirement Accounts	Advisor Support Services	Digital & Social Marketing	Compliance Manual
Retirement Plans	Client & Practice Acquisition	Marketing Materials	
Direct Business	Best Practices		
	Succession Planning		
	Reporting		
	Communications		
	New		

Section 3g: Glossary of Terms – Overview and Mini-description

- An Overview and Mini-description (shorter than 140 characters) are short narratives that explain the piece of content being searched or viewed.
    - The Overview is located on Detail pages.
    - The Mini-description is displayed on Aggregate pages.

Section 3h: Glossary of Terms – Publishing Site

The Publishing site is the frontend website (this is where users search/review/read content)
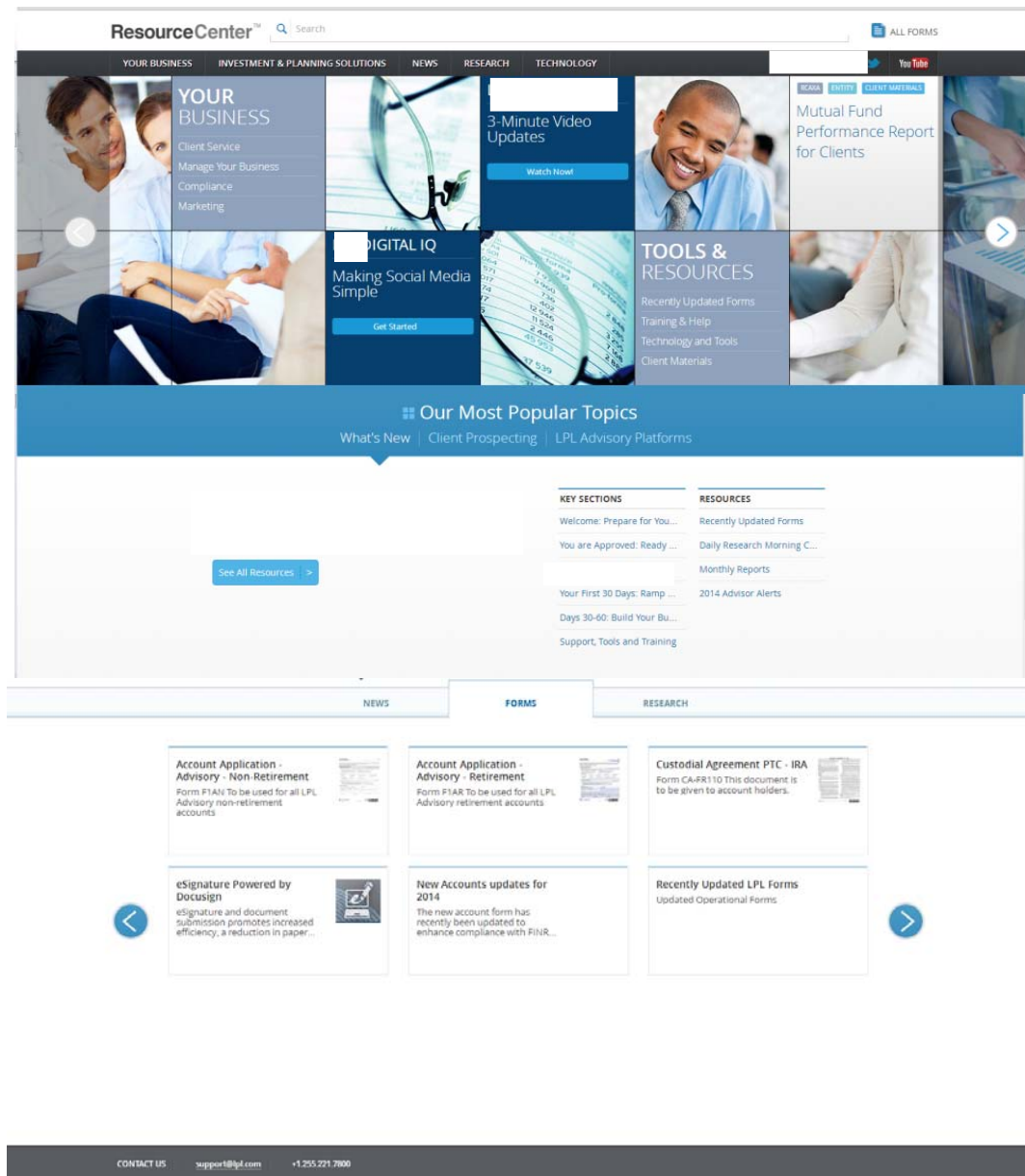
Section 3i: Glossary of Terms – Related Articles

The Related Articles area is a documents/content list that relates to the item viewed within a Detail page.

Section 10c: Adding Content – Detail Page

This section describes how to create a Detail page and all components required to make the Detail page not only functional, but an asset to those who use it.

Please review these sections before creating a Detail page.
- Section 3: Glossary of Terms - Detail Page
- Section 3: Glossary of Terms - Keywords
- Section 3: Glossary of Terms - Overview and Mini-description
- Section 3: Glossary of Terms - Related Articles
- Section 3: Glossary of Terms - Tags
- Section 7: Authoring Site Map
- Section 8: Folder Hierarchy
- Section 9: Tags
- Section 10: Adding Content – DAM

Steps

1. Log into the Authoring site and go to the website portion of CQ5.
    a. An Editor and/or Super User will seek out the Mega Menu folder structure on the left navigation and determine where you want to build your detail page. Highlight where the Detail page will fall. In this case it will fall under *Mega Menu / Your Business / Manager Your Business / New to*   Note: If the business unit wants to display the Detail page on multiple supporting pages, the process starts with one area and is then tagged to multiple locations during the page build.)