

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

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

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10-e	Aggregate page	Coming soon
11	How to I request changes to the resource center?	Coming soon
12	Enterprise Content Council	Coming soon
13	Content Marketing Team	Coming soon

## 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.

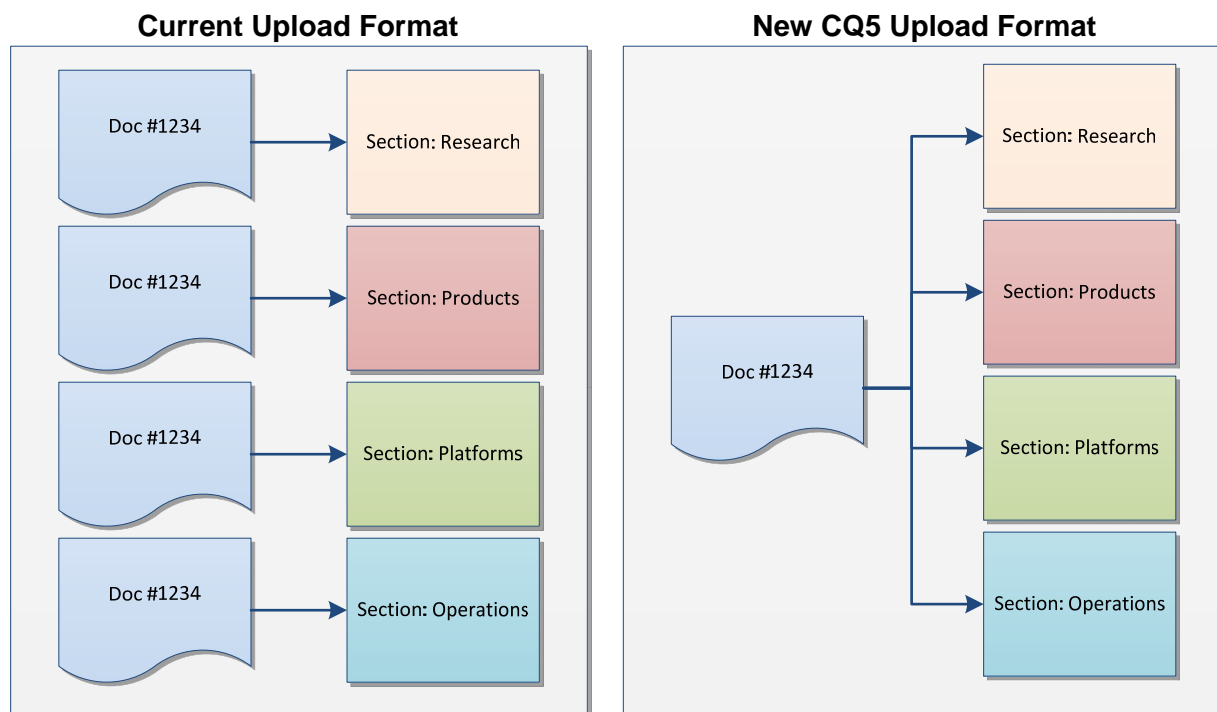
### Key Benefits

- 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.

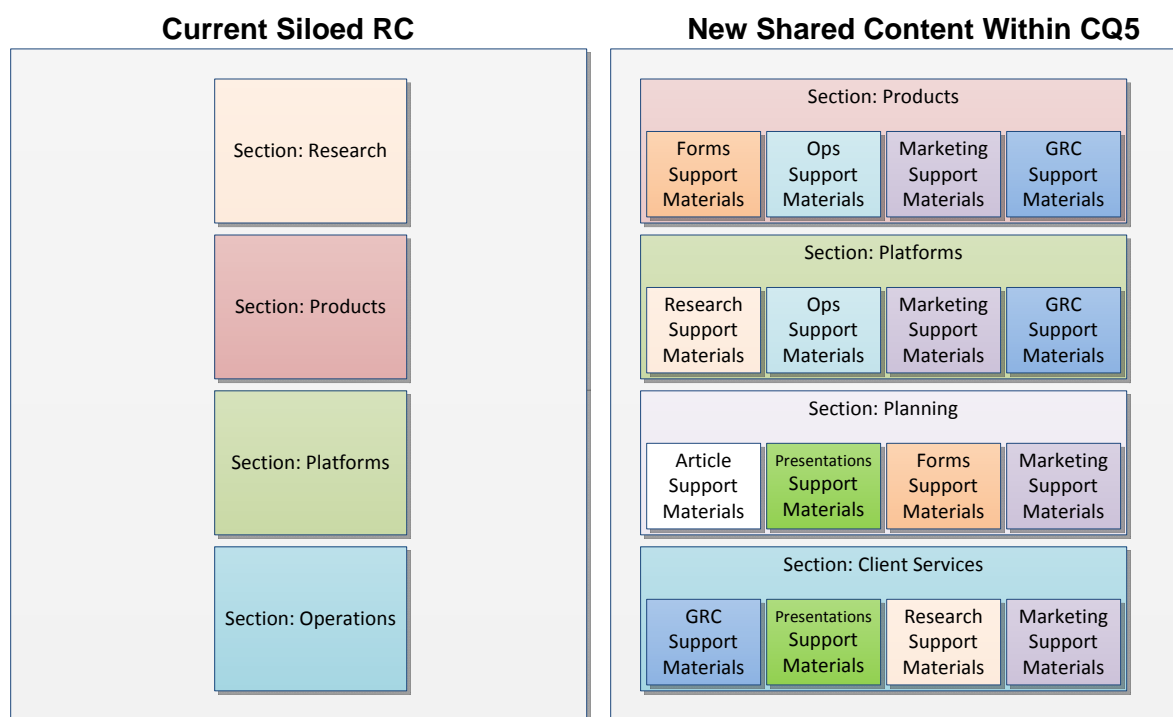


## Section 2: New System Content

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



## 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)

Search

SOLUTIONS NEWS RESEARCH TECHNOLOGY Platforms

Tools, Research, Forms, and Reports to help you with Platforms

<b>New and Improved Investor Presentation - Proposal Tool</b> The Investor Presentation & Proposal Tool (IPPT) has been updated to make it easier to quickly create powerful presentations and investment proposals to...	<b>Strategic Asset Management</b> SAM, LPL Financial's comprehensive investment platform, provides advisors access to more than 8,000 mutual funds, ETFs, stocks, bonds and alternative...	<b>Model Wealth Portfolios</b> Model Wealth Portfolios, a centrally managed platform from Advisory Consulting Services, provides asset allocation models and recommended mutual funds...
<b>Sales Desk Map</b> Get to know our Investment and Planning Solutions Teams -- we'll help you turn prospects into clients and deepen relationships with existing clients.	<b>Optimum Market Portfolios</b> The Optimum Market Portfolios provide you with a powerful resource to help you manage your brokerage clients' assets through diversified asset allocation model...	<b>Personal Wealth Portfolios</b> Personal Wealth Portfolios (PWP) is a single account solution for separate accounts and mutual funds. This platform helps you achieve greater efficiency through...
<b>Manager Select</b> An account platform that offers investors the ability to access a variety of managers at significantly lower account minimum.	<b>Advisory Account Fee Billing Details</b> Know what to expect when your account is billed	<b>Empower Your Business: Research at a Glance</b> Our goal is to help you identify what the financial landscape means to your business, improve customer loyalty through value-added client materials, and...

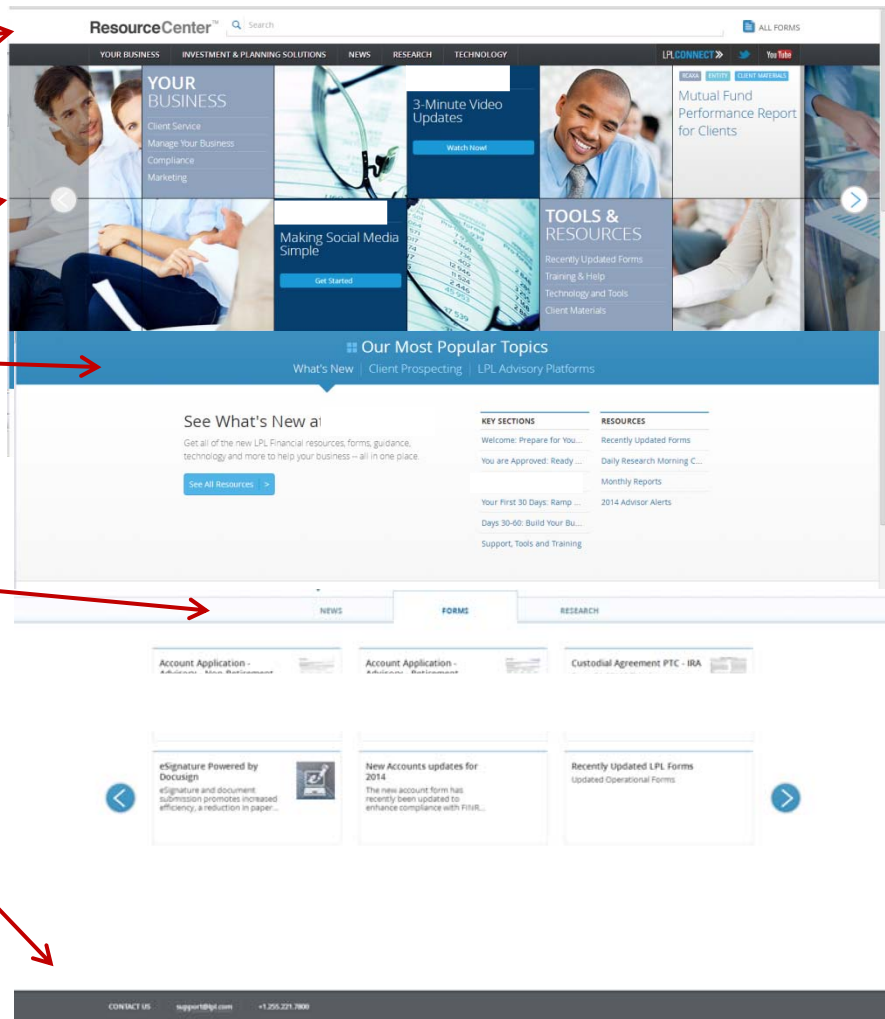
Top Resources

CLIENT MATERIALS TOOLS AND RESOURCES FORMS RESEARCH

<b>Account Opening Checklist - LPL Advisory (SAM, SAM II, OMP, MWP, PWP, Manager...)</b> Form A30 Use this checklist to determine the appropriate forms required to open LPL...	<b>Account Feature - Margin Approval - SAM/SAM II</b> Form F138 Use this form to add the margin feature to an existing SAM/SAM II account.	<b>Account Feature - Fees - Direct Billing</b> Form A10 This form must be completed in order for your client(s) to be directly billed f...
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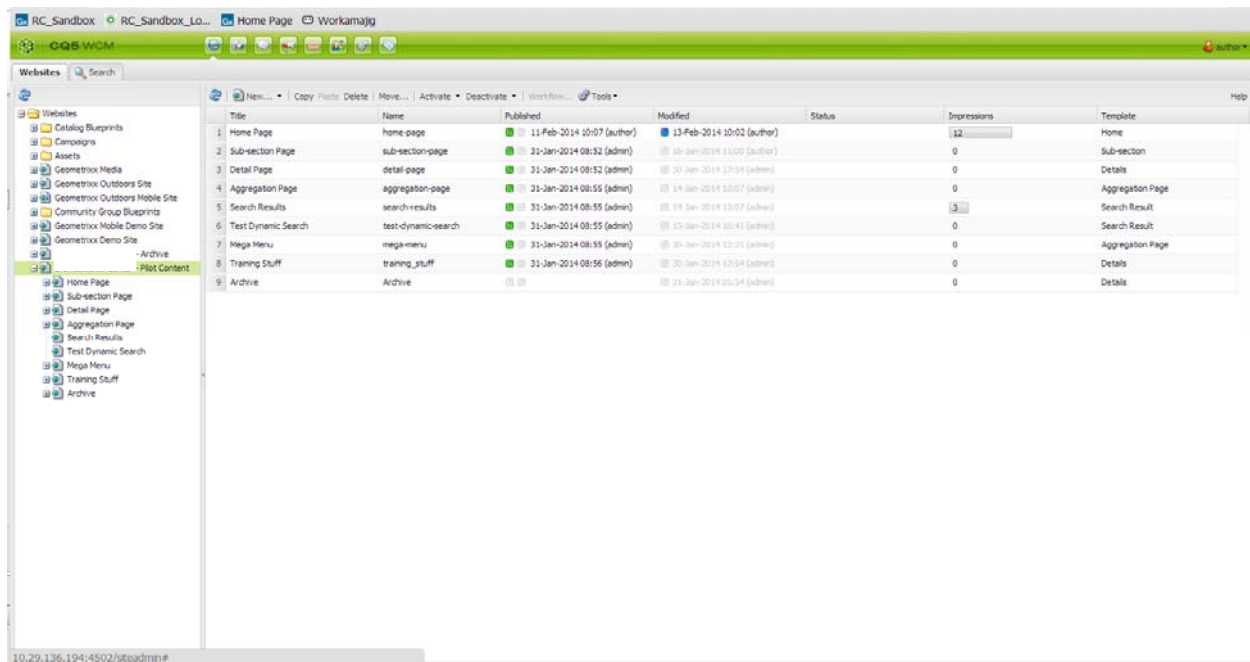
## Section 3b: Glossary of Terms – Website Areas

- 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



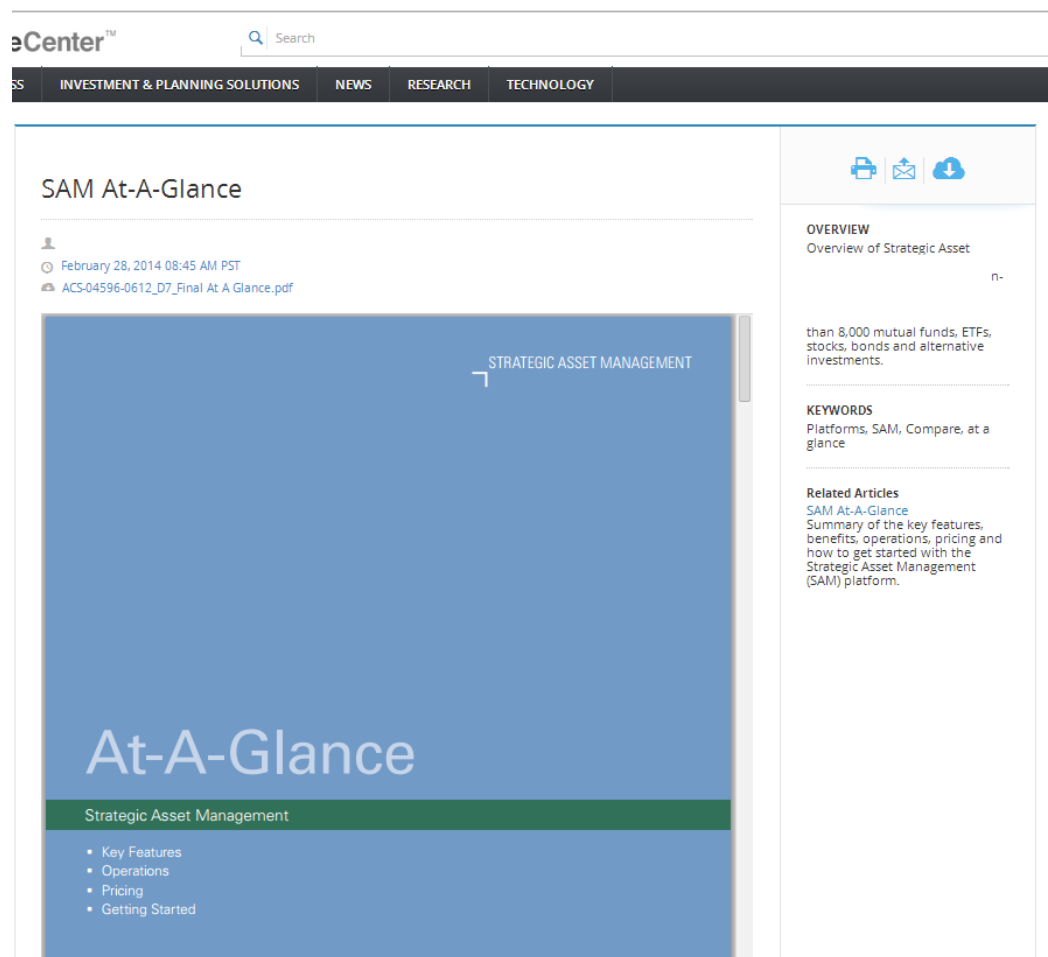
## Section 3c: Glossary of Terms – Author Site

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



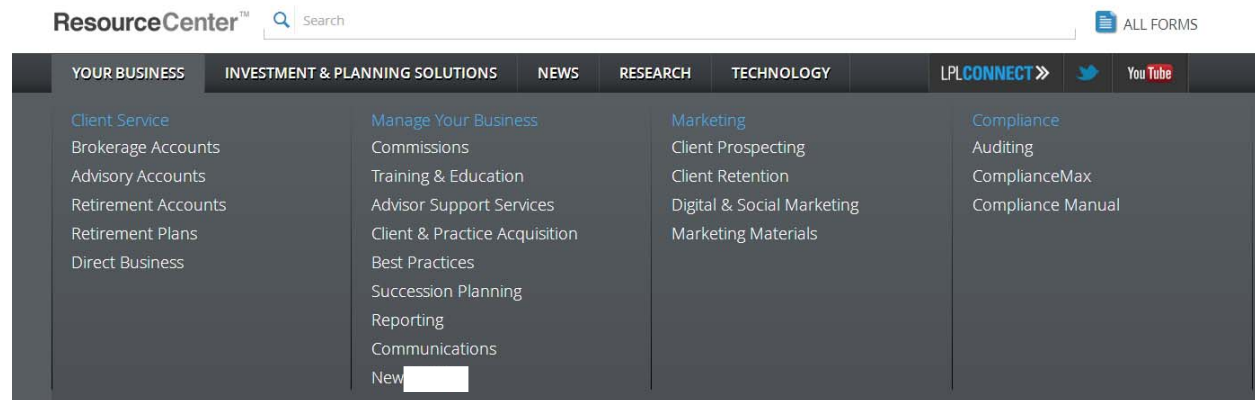


## Section 3e: Glossary of Terms – Keywords

- 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.



## 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.

**SAM At-A-Glance**

February 28, 2014 08:45 AM PST  
ACS-04596-0612\_D7\_Final At A Glance.pdf

STRATEGIC ASSET MANAGEMENT

**OVERVIEW**  
Overview of Strategic Asset

investment platform, provides advisors with access to more than 8,000 mutual funds, ETFs, stocks, bonds and alternative investments.

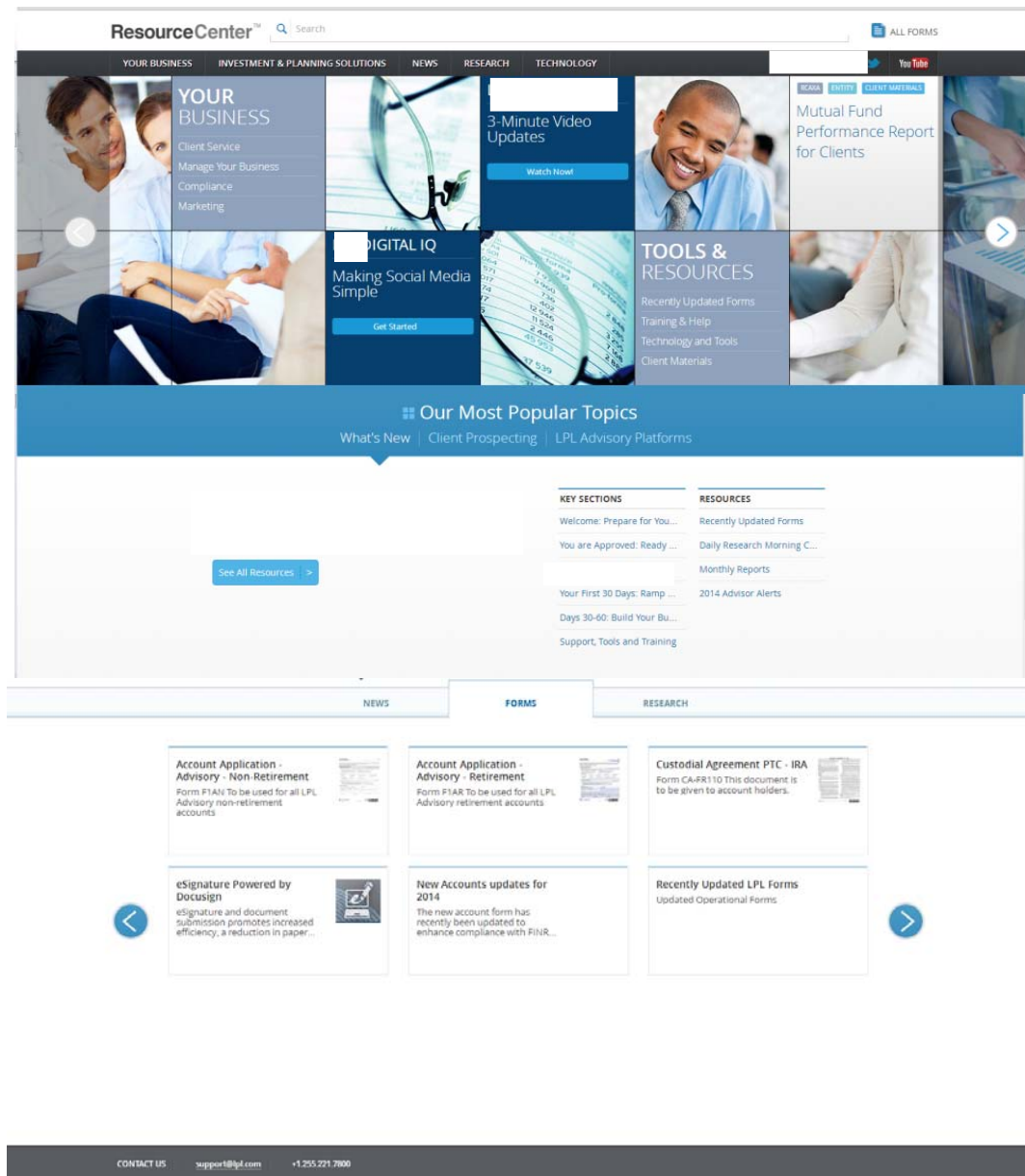
**KEYWORDS**  
Platforms, SAM, Compare, at a glance

**Related Articles**  
[SAM At-A-Glance](#)  
Summary of the key features, benefits, operations, pricing and how to get started with the Strategic Asset Management (SAM) platform.

Forms, Tools and Resources for Strategic Asset Management		
Model	<b>SAM At-A-Glance</b> Summary of the key features, benefits, operations, pricing and how to get started with the Strategic Asset Management (SAM) platform.	Account Opening (SAM, SAM II, OM)
Recommendation		Form A30 Use this check appropriate forms required accounts.
Comparison	<b>Account Feature - Margin Approval - SAM/SAM II</b> Form F138 Use this form to add the margin feature to an existing SAM/SAM II account.	<b>SAM Client Brochure</b> This brochure explains combined with the SAM investors reach their goals.
Direct Billing	<b>Firm Brochure</b> Form A58 Gives information about the investment advisor and its business for the use of clients. This form is to be	<b>Model Portfolio</b> 31, 2013 SAM Diversified Tactics

## 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.

**ResourceCenter™**

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RESEARCH

TECHNOLOGY

Model Portfolio Performance | September 30, 2013

January 30, 2014 00:00 AM PST

SAM Tactical 9302013.pdf

LPL FINANCIAL RESEARCH

SAM DIVERSIFIED TACTICAL MODEL PERFORMANCE (GROSS) THROUGH 9/30/2013

MODEL PORTFOLIOS	Sep-13	Rolling 3-Month	YTD 2013	Annualized 1-Year	Annualized 3-Year	Annualized 5-Year	Annualized 10-Year	Annualized Since Inception
Aggressive Growth Diversified	3.98%	6.47%	17.73%	20.90%	10.59%	9.34%	8.00%	7.67%
AG Benchmark	3.53%	6.02%	20.16%	20.45%	15.52%	10.13%	7.84%	9.22%
Versus AG Benchmark	0.45%	0.44%	-2.43%	0.45%	-5.33%	-0.79%	0.16%	-1.55%
Growth Diversified	3.86%	6.09%	15.51%	18.92%	10.34%	9.65%	7.79%	7.79%
G Benchmark	3.12%	5.17%	16.47%	16.75%	13.80%	9.49%	7.47%	8.96%
Versus G Benchmark	0.73%	0.92%	-0.96%	2.17%	-3.52%	0.16%	0.32%	-1.17%
Growth with Income Diversified	3.49%	4.61%	10.31%	13.42%	8.70%	9.55%	7.17%	7.94%
GWI Benchmark	2.56%	4.02%	11.68%	11.94%	11.11%	8.68%	6.80%	8.41%
Versus GWI Benchmark	0.92%	0.60%	-1.38%	1.48%	-2.41%	0.87%	0.37%	-0.48%
Income with Moderate Growth Diversified	2.87%	2.90%	5.65%	8.14%	7.32%	9.25%	6.80%	7.49%
IMG Benchmark	1.96%	2.85%	7.09%	7.32%	8.27%	7.54%	6.09%	7.74%
Versus IMG Benchmark	0.90%	0.05%	-1.44%	0.81%	-0.95%	1.71%	0.71%	-0.25%
Income with Capital Preservation Diversified	2.58%	2.04%	3.15%	5.16%	6.61%	9.13%	6.52%	7.20%
ICP Benchmark	1.41%	1.68%	2.66%	2.97%	5.39%	6.20%	5.29%	6.91%
Versus ICP Benchmark	1.17%	0.36%	0.49%	2.19%	1.22%	2.93%	1.32%	0.29%

SAM DIVERSIFIED PLUS TACTICAL MODEL PERFORMANCE (GROSS) THROUGH 9/30/2013

MODEL PORTFOLIOS	Sep-13	Rolling 3-Month	YTD 2013	Annualized 1-Year	Annualized 3-Year	Annualized 5-Year	Annualized 10-Year	Annualized Since Inception
Aggressive Growth Diversified Plus	3.98%	6.50%	17.27%	20.61%	10.68%	8.81%	5.10%	5.89%
AG Benchmark	3.53%	6.02%	20.16%	20.45%	15.52%	10.13%	5.91%	6.70%
Versus AG Benchmark	0.44%	0.47%	-2.89%	0.16%	-4.84%	-1.32%	-0.81%	-0.81%
Growth Diversified Plus	3.86%	6.14%	15.36%	18.80%	10.85%	9.56%	5.79%	6.20%
G Benchmark	3.12%	5.17%	16.47%	16.75%	13.80%	9.49%	5.79%	6.43%
Versus G Benchmark	0.73%	0.96%	-1.11%	2.05%	-2.95%	0.07%	-0.10%	-0.24%
Growth with Income Diversified Plus	3.31%	4.73%	10.08%	13.13%	8.79%	9.21%	5.57%	5.83%
GWI Benchmark	2.56%	4.02%	11.68%	11.94%	11.11%	8.68%	5.95%	6.21%
Versus GWI Benchmark	0.75%	0.71%	-1.60%	1.19%	-2.32%	0.53%	-0.38%	-0.38%
Income with Moderate Growth Diversified Plus	2.78%	3.18%	5.84%	8.20%	7.42%	8.89%	5.39%	5.52%
IMG Benchmark	1.96%	2.85%	7.09%	7.32%	8.27%	7.54%	5.63%	5.71%

OVERVIEW

SAM Diversified Tactical Model Performance (Gross) Through 9/30/2013

KEYWORDS

SAM, Model Performance

Related Articles

[Model Portfolio Performance | November 30, 2013](#)  
[SAM Diversified Tactical Model Performance \(Gross\) Through 11/30/13](#)  
[Model Portfolio Performance | October 31, 2013](#)  
[SAM Diversified Tactical Model Performance \(Gross\) Through 10/31/13](#)  
[Model Portfolio Performance | August 31, 2013](#)  
[SAM Diversified Tactical Model Performance \(Gross\) Through 8/31/13](#)  
[Model Portfolio Performance | July 31, 2013](#)  
[SAM Diversified Tactical Model Performance \(Gross\) Through 7/31/13](#)  
[Mutual Fund Model Portfolio Performance For Clients | September 30, 2013](#)  
 Use this compliance-approved, client report on Mutual Fund Model Portfolio Performance (as of September 30, 2013). Tracking # 1-133591

The New Resource Center Training Guide April 2014

Page 13

## 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 tc* 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.)

