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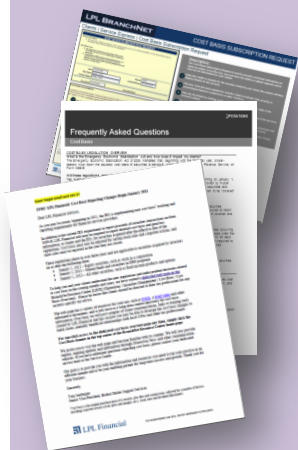
## ABOUT THIS DOCUMENT:

We are glad to have you as a new iKnow Knowledge base (KB) author. As an author, you will write articles from scratch or based upon existing material. In order for our Knowledge base to be successful, all articles within LPL Financial's (LPL) iKnow Knowledge base need to be consistent, accurate, and able to be easily understood the first time they are read.

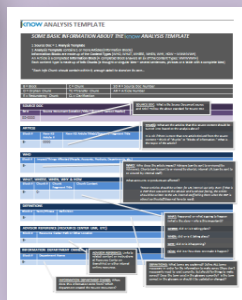
The goal of this document is to provide you with a process and the necessary tools to help you write the best iKnow KB articles possible.

## These are the documents you will need to complete an iKnow KB article(s)

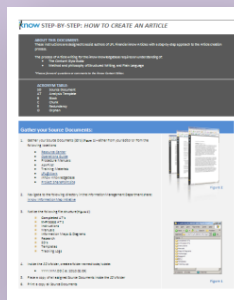
### Source Documentation



### Analysis Template Guide



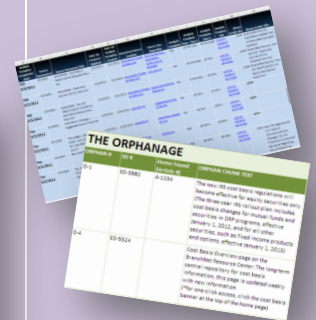
### Step-by-Step Instructions



### Analysis Template



### SD Log & Orphanage



## Introduction:

To Write a KB article, You Need to Understand the Following:

1. An understanding of (Refer to Appendix section 3, 4, 5):



- a. Structured Writing
  - b. Information Mapping
  - c. Plain Language
2. Source Documents are documents that come from various locations (departments or business units) *(Refer to Appendix 1)*
  3. A Source Document is analyzed with an Analysis Template*(Refer to Appendix 8)*
    - a. The information is processed using an information map called the Analysis Template, which is made up of:
      - i. Information blocks
      - ii. Information blocks are made up of Info chunks
      - iii. Information blocks are:
        1. Categorized: Who, What, Where, When, How, Why, Definition
        2. Labeled

*(Learn more about Info chunks, blocks and labeling by going to Appendix section 9, 12)*
  4. What is a knowledge base (KB)?
  5. The Analysis Template becomes one or more iKnow KB articles based on the source content

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## Basic Steps:

### Writing an iknow KB article - *The Process:*

1. Writing an article from Scratch
2. Writing an article from Source Documentation

### 1. Writing an article from Scratch

- a. If you are an expert in your field, you may be asked to share your knowledge by writing an article for our KB *(See Appendix section 2)*
- b. Although not all sections of the template will be required, we request that you use our Analysis Template to help ensure consistency with our online content and style
- c. Try to answer each of the content types: Who, What, Where, When, How and Why *(Refer to Appendix section 9)*
- d. Refer to the Content Rewrite section to help ensure consistency *(Appendix section 12)*
- e. Remember not to make assumptions as you are writing, your audience might not know as much as you;
  - i. Define all terms and acronyms
  - ii. Complete the AT so that a non-financial person will be able to understand the content
- f. Use graphics and tables to help break apart the information



- g. Provide meaningful block labels and article titles
- h. Spelling and Grammar are extremely important, so make sure to use spell check – and have a coworker review your work

## 2. Writing an article from Source Documentation

- a. Collect all documentation that has been written on the topic that you have been assigned
- b. Check for completeness
  - i. Do you have documentation from all of the possible sources? If not, is it because none exists or that it needs to be collected (*refer Appendix Section 1*)
- c. Read all documentation and sort
- d. Use one Analysis Template for each Source Document
- e. Begin chunking the information using the chunking principle (*Appendix Section 4*)
- f. Apply the relevance principle, eliminating that which is not relevant (*Appendix Section 4, 7*)
- g. Apply the labeling principle (Giving each block a meaningful label) (*Appendix Section 4, 7*)
- h. Apply consistency principle (*Appendix Section 4, 7*)
- i. Apply the graphic principle (*Appendix Section 4, 7*)
- j. Eliminate redundancies – if you feel you have seen the information before, mark the block of information with an “R” code and paste the material into the template as ~~strike through text~~ (*Refer to Redundancies in Appendix Section 10*)
- k. Move orphan info chunks or blocks to *The Orphanage* spreadsheet – orphan chunks are chunks of information that do not belong in the article(s) you are currently analyzing (*Appendix Section 11*)
- l. Finish your content rewrites and edits, refer to rules for consistency in the content rewrite section (*Appendix Section 12*)
- m. Enter any and all Clarifications using the “[CL-#]” code inside the information block and explanation box at the bottom of the template (*Appendix section 9*)
- n. Name your article(s); use thoughtful, meaningful words that best describe the content within
- o. Check for spelling and grammar



# APPENDIX

## 1. Source Documents

### Various Content from Many Sources:

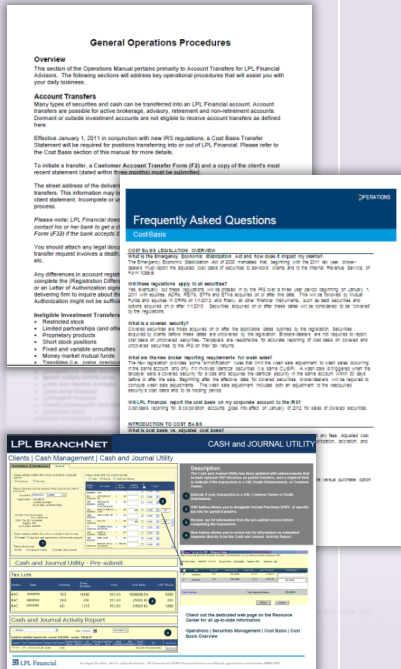


Figure 1

Source Documents (SD's) are documents that come from various locations (departments or business units), and were written at different times throughout LPL's history.

You might think to yourself: *"Sounds like Source Documents could be just about anything!"*

Simply put, they are.

Notice the three hyperlinked samples to the right (**Figure 1**). SD's come in different styles, types, shapes and sizes – and they contain widely varying scope and content.

Although these documents at one time and place were considered official references for company employees and departments, a professional writer did not write most content.

An SD may contain information like:

- Procedures
- Guidelines
- Policy
- Instructions
- Graphics
- Legislative Adjustments or Changes

Source Documents may come from places like:

- The *BranchNet* Resource Center
- Operations Guide
- Procedure Manuals
- Training Materials
- LPL@Work
- *iKnow* Knowledgebase
- Project SharePoint site

## 2. iKnow Knowledge Base

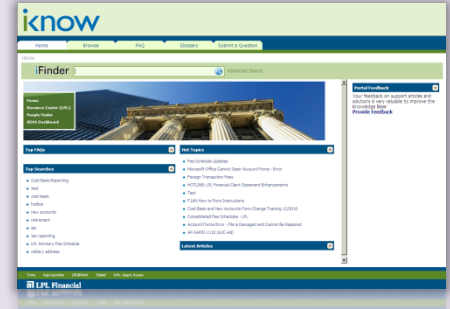


**The KB - a Home for Information:**

What is a knowledge base (KB)?

Let's start with the definition from Wikipedia:

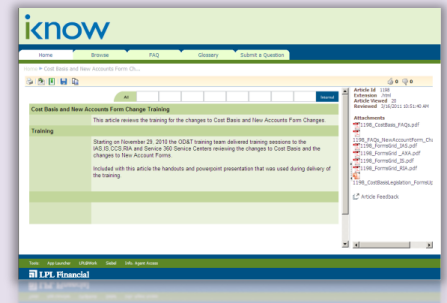
“A **knowledge base** (abbreviated **KB**, **kb**) is a special kind of database for knowledge management, providing the means for the computerized collection, organization, and retrieval of knowledge. Also a collection of data representing related experiences, their results are related to their problems and solutions.”



LPL's new KB is called: *iKnow*. (Figure 2)

Your job is to assist us as we import information from SD's into the KB in the form of articles. (Figure 3 contains a sample article from the KB)

Before we explain detail the process of creating an article, you will need to spend some time reading through the research from which we modeled our matrix.



### 3. Research & Reading

**Read Some Key Sections from Essays About Structured Writing, Information Mapping, and Plain Language:**

I have provided the complete versions of several essays in the “Research” tab of your *iKnow Author's Binder*.

Below are a few excerpts from the readings:

1. *Structured Writing as a Paradigm*, by Robert E. Horn (Rhetoric and Composition, Georgia State University)
2. *Information Mapping – A Research Note* by Namahn (Namahn, Human-Centered Design Consultancy)
3. *What is Plain Language?* (The Center for Plain Language)

### 4. Structured Writing

*From Structured Writing as a Paradigm, by Robert E. Horn*

**Horn's Questions are relevant to developing an information map for our KB:**

**Structured writing** has been developed to address many of the perennial problems most people have when working on a complex written communication task:

- How should I organize the mass of subject-matter material?
- How can I make the structure of the document and the subject matter



more obvious?

- How do I analyze the subject so that I am sure that I have covered all of the bases?
- How do I know the coverage is complete? How will the reader understand this scope?
- In large analytic and communication tasks, how do I track multiple inputs, different levels of reader competence and rapidly multiplying and increasingly demanding maintenance requirements?
- How do I sequence the final document so that it will present the information to different levels of readers in the most useful manner?
- How do I organize the linkages so that different readers with different backgrounds can get what they want from it easily and quickly?
- What formats are optimum to enable users to make sense of the document as a whole and through the window of the current display?
- How do we make instructional writing optimally effective and efficient?

**Definition: Information blocks**

Information blocks are the basic units of subject matter in structured writing analysis.

They replace the paragraph as the fundamental unit of analysis and the form of presentation of that analysis. They are composed of one or more sentences and/or diagrams about a limited topic. They usually have no more than nine sentences. They are always identified clearly by a label.

*\*Read more about Structured Writing in the Essay located under the "Research" tab of your binder*

## 6. Information Mapping

*Based on Recent Progress in the field of Structured Writing and the Work of Robert E. Horn*

**Think of the 6 Principles as 6 passes of info block processing:**

- Chunk and Block the information
- Label your Blocks
- Eliminate content detail that is irrelevant
- Consistently format and organize information
- Display information using tables and graphics
- Make clarifications and detail accessible to all readers

**The 6 Principles:**

All information blocks are constrained by six principles used to guide structured writing:

1. **Chunking Principle:** derives from George Miller's basic research, which suggest that we can hold only 7 plus or minus 2 chunks of information in human short-term memory
2. **Labeling Principle:** Label every chunk and group of chunks according to specific criteria (*\*I need to get this criteria – not provided in Horn's paper*)
3. **Relevance Principle:** Include in one chunk only the information that relates to one main point.
4. **Consistency Principle:** For similar subject matters, use similar words, labels, formats, organizations and sequences.
5. **Integrated Graphics:** Use of illustrations, figures and tables as an integrated part of the text.
6. **Accessible Detail:** Use of details, illustrations and clarifications where needed; use concrete examples when presenting abstract ideas.
- 7.



## 6. Plain Language

*What is Plain Language? - The Center for Plain Language*

### Plain Language is Information that is Focused on Readers:

Plain language is information that is focused on readers. When you write in plain language, you create information that works well for the people who use it, whether online or in print.

Our measure of plain language is behavioral: Can the people who are the audience for the material quickly and easily

- find what they need
- understand what they find
- act appropriately on that understanding

Plain language is more than just short words and short sentences — although those are often two very important guidelines for plain language. When you create information in plain language, you also organize it logically for the audience. You consider how well the layout of your pages or screens works for the audience.

Word Choice	Readability	Verb Form	Structure	Evaluation
<ul style="list-style-type: none"> <li>•Use familiar words</li> <li>•Use 'you,' 'I,' 'we,' 'they'...</li> <li>•Use 'must'</li> <li>•Avoid jargon and acronyms</li> <li>•Be positive</li> <li>•Be gender neutral</li> <li>•Omit extra words</li> </ul>	<ul style="list-style-type: none"> <li>•Keep it simple</li> <li>•Limit line length</li> <li>•Left-align margins</li> <li>•Don't use all capital letters</li> <li>•Break up dense text</li> <li>•Use white space</li> <li>•Use bullets or tables</li> <li>•Keep formats simple and consistent</li> </ul>	<ul style="list-style-type: none"> <li>•Use active voice</li> <li>•Use action verbs</li> <li>•Use the present tense</li> </ul>	<ul style="list-style-type: none"> <li>•Use introductions</li> <li>•Use descriptive headers</li> <li>•Organize information to answer reader questions</li> <li>•Use parallel construction</li> <li>•Be direct</li> <li>•Avoid exceptions</li> </ul>	<ul style="list-style-type: none"> <li>•Conduct:                             <ul style="list-style-type: none"> <li>• Interviews</li> <li>• Focus groups</li> <li>• Surveys</li> </ul> </li> <li>•Compare "Before and After" examples</li> <li>•Evaluate:                             <ul style="list-style-type: none"> <li>• Results</li> <li>• Readability</li> <li>• User feedback</li> <li>• Your process</li> </ul> </li> </ul>

*\*Read more about Plain Language in the Guidelines for Creating Plain Language Materials, located under the "Research" tab of your binder*

## 7. Applying Information Mapping, Structured Writing & Plain Language

### A Broad Perspective:

Structured Writing, Information Mapping, and Plain Language Combined Provide us With a Way of Structuring our Writing and our Documents so that they are:

- Methodical
- Understandable
- Intelligent



**Key Points From the Reading:**

- Repeatable
- Short phrases; break up the information into Info chunks
- Tables, charts, and pictures help explain your point
- Be consistent
- Label and Title your information blocks and articles with meaningful key words that summarize the content
- Eliminate redundancy from content
- Present the facts, only the detail needed
- Organize the information so that it is easy to search and read
- Communicate with your audience so that they understand the first time they have heard it

## 7. Applying the 6 Principles

**The Chunking Process is Powerful:**

Follow the sample steps below to see how powerful the chunking process can be.

Examine how the below source content evolves – from the original content to its graphical outcome after applying the principles.

**Records Management Process**

The records management process is critical for maintaining Level 4 of documentation, quality records. This process is like the document management process. There are 7 stages in the process. Stages 1 and 2 are Record Need Identification and Collection Method Determination. Record needs are identified by the Quality Manager when there is a need for a record to prove that the quality system is working effectively. The Quality Controller is responsible for it.

**Records Management Process**

**Introduction** The records management process is critical for maintaining Level 4 documentation, quality records.

**Process** The table below lists the stages and who is responsible for each stage in the records management process.

Stage	Who is Responsible	Description
1	Quality Manager	Record need identification
2	Quality Supervisor	Collection Method determination
3	Operator	Data Collection
4	Documentation	



**Source Content:**

December 2010: New cost basis functionality will be activated on BranchNet and a corresponding eLearning module will be available to walk you through those changes. Watch in Streamline News and on the *BranchNet Resource Center* for launch dates and details.

January 1, 2011: The new IRS cost basis regulations will become effective for equity securities only. (The three-year IRS rollout plan includes cost basis changes for mutual funds and securities in DRP programs, effective January 1, 2012, and for all other securities, such as fixed income products and options, effective January 1, 2013).

**a. Apply chunking Principle:**

December 2010:

New cost basis functionality will be activated on BranchNet and a corresponding eLearning module will be available to walk you through those changes.

Watch in Streamline News and on the *BranchNet Resource Center* for launch dates and details.

January 1, 2011:

The new IRS cost basis regulations will become effective for equity securities only.

January 1, 2012,

(The three-year IRS rollout plan includes cost basis changes for mutual funds and securities in DRP programs, effective

January 1, 2013

and for all other securities, such as fixed income products and options, effective).

**2. Apply Relevance Principle:**

December 2010:

New cost basis functionality will be activated on BranchNet and a corresponding eLearning module will be available to walk you through those changes.

Watch in Streamline News and on the *BranchNet Resource Center* for launch dates and details.

January 1, 2011:

The new IRS cost basis regulations will become effective for equity securities only.

January 1, 2012,

(The three-year IRS rollout plan includes cost basis changes for mutual funds and securities in DRP

programs, effective

January 1, 2013

and for all other securities, such as fixed income products and options, effective).

**3. Apply Labeling Principle**

**December 2010:**

New cost basis functionality and active on BranchNet eLearning module

Watch in Streamline News and on the *BranchNet Resource Center* for dates and details.

**January 1, 2011:**

new IRS cost basis regulations become effective for equity securities only.

**January 1, 2012,**

three-year IRS rollout plan includes cost basis changes for mutual funds and securities in DRP programs,

**January 1, 2013**

all other securities, such as fixed income products and options, effective).



#### 4. Apply Consistency Principle:

##### December 2010:

New cost basis functionality and active on

- BranchNet
- eLearning module

Go to *Streamline News* or *BranchNet Resource Center* for dates and details

##### Three-year IRS rollout plan:

###### January 1, 2011:

New IRS cost basis regulations become effective for:

- Equity securities only

###### January 1, 2012,

New Regulations include cost basis changes for:

- Mutual funds
- Securities in DRP programs

###### January 1, 2013

New Regulations:

All other securities, such as fixed income products and options, effective

#### 7. Apply Graphics to Create an Information Block in a Table:

##### KEY INFORMATION ABOUT COST BASIS CHANGES

DATE	DESCRIPTION
<b>Preparation:</b>	
Dec 2010:	<ul style="list-style-type: none"><li>• New cost basis functionality and instructions are updated on<ul style="list-style-type: none"><li>○ <i>BranchNet</i></li><li>○ eLearning module on LPL@ Work</li></ul></li><li>• For dates and details, go to:<ul style="list-style-type: none"><li>○ <i>Streamline News</i></li><li>○ <i>BranchNet Resource Center</i></li></ul></li></ul>
<b>IRS 3-Year Rollout:</b>	
1/1/2011	<ul style="list-style-type: none"><li>• New IRS regulations effective for:<ul style="list-style-type: none"><li>○ Equity securities only</li></ul></li></ul>
1/1/2012	<ul style="list-style-type: none"><li>• New Regulations:<ul style="list-style-type: none"><li>○ Mutual funds</li><li>○ Securities in DRP programs</li></ul></li></ul>
1/1/2013	<ul style="list-style-type: none"><li>• New Regulations:<ul style="list-style-type: none"><li>○ All other securities (such as fixed income products and options)</li></ul></li></ul>



## 6. Links Labels and References Makes Information more Accessible

LOCATIONS TO LINK TO			
URL Loc#	Block#	URL Page Title	URL to Page Outside iknow Knowledge Base
UL-1	B-1	Wikipedia – Cost Basis	<a href="http://en.wikipedia.org/wiki/Cost_basis">http://en.wikipedia.org/wiki/Cost_basis</a>
UL-2	B-1	LPL Operations Guide	<a href="http://lplwork.corp.lpl.com/aboutus/businessunits/bdss/bdssinfo/management/Pages/OperationsGuide.aspx">http://lplwork.corp.lpl.com/aboutus/businessunits/bdss/bdssinfo/management/Pages/OperationsGuide.aspx</a>
UL-3	B-1	BranchNet	<a href="https://security.lpl.com/Login.aspx?sc=LPL-BN-200-OK">https://security.lpl.com/Login.aspx?sc=LPL-BN-200-OK</a>

ARTICLE		
Block #	New KB Article #	New KB Article Title(s)/Summary Fragment Title
B-1	0000	<a href="#">Cost Basis Reporting for Realized and Unrealized Gains</a>
B-2	0000	<a href="#">Cost Basis Reporting for Disposed and Undisposed Gains</a>
B-3	0000	<a href="#">New KB Article Title(s)/Summary Fragment Title</a>

## 9: The Analysis Template

### Analysis Template Basics:

We developed the Analysis Template (AT) to assist authors with their analysis of source content.

Because SD's are so diverse, our job as authors is to:

- Eliminate the excess
- Extract *only* the facts from content
- Present facts in a way that is easy-to-read and easy-to-search or find

The AT helps us do the above key things in several ways:

- Provides space for the chunking and blocking process – where authors can analyze content
- Allows us to map our information into a structured and methodical format so that its final presentation is clean, clear, and ready to be imported into the KB

### 7 Points to Ponder:

1. **An Analysis Template = information map**
2. **1 source document = 1 analysis template:** SD's and AT's have a 1 to 1 relationship

3. **However, an Analysis Template is a container for 1 or more articles;** there are times when a single source document may contain multiple information blocks about two, three or more topics that do not belong together
4. **An information block is made up of multiple content types (Who, What, Where, When, Why, and How):** It is important to identify each of the six content types within your source content

5. **An Article is multiple blocks** (a completed article answers all six of the content types

QTY	ITEM	EQUALS	QTY	ITEM
1	source doc	=	1	Analysis Template (Info Map)
1	source doc	=	1 ≤	articles
1	article	=	1 <	blocks
1	block	=	∞	chunks
1	content type	=	1 ≤	blocks

6. **Each content type is made up of 1 or more blocks of information** (a singular and complete idea – several sentences, phrases, or a table that are a complete thought)

7. **Each information block is made up of multiple info chunks**

8. **Each Information block should contain within it, enough detail so that the information may stand on its own**

## 10. Creating an Article with the Analysis Template

### Source Document Name and Numbering:

Most of the time the SD name is easy to find. The SD name would be whatever the title of the document is. If it's not apparent, request clarification from your editor or supervisor. Your editor or supervisor will supply you with an SD number for every SD you are assigned.

### Locate the Who in Your SD Content:

As you read through the content, think about:

- Who the document is written for?
- Who is the SD about?
- Who does the information impact?

Keep in mind that the Who can also be a key item – like an account type or product (which account types or products are affected?) The Who(s) should be identified and written in this



field. Separate each Who with a comma.

SOURCE DOC	
SD #	Source Document (Location / Title / Chapter / Section Header)
SD-0000	LPL Financial Advisor Operations Manual / General Operations Procedures / Cost Basis

WHO	
Block #	Impact/Things Affected (People, Accounts, Products, Departments, etc.)
B-1	Broker/Dealers
B-1	Clients

**What, Where, When, Why, and How:**

This section is where you will parse the majority of your Info chunk content into Information blocks.

You may choose to:

- Copy and paste the entirety of the content into your SD into the *What, Where, When, Why, and How* (W, W, W, W, H) box, and then chunk the information from there
- Or you may chunk each information block separately and then copy and paste into the AT

Each Information block should be placed into a separate cell (simply use the tab key to add as many rows as necessary).

As you are chunking and creating your blocks, focus on filtering the information into W, W, W, W, H classifications.

When you have finished chunking your information, classify each chunk: W, W, W, W, and H.

Provide each completed Information block with a "B-#" – there is a field in the AT designated for block-#'s (B-#'s do not have to be in any specific order, but start at the top of the document, and label them alphanumerically once you have moved all content into it's appropriate place.

**Definitions:**

Relook at your Information blocks and Info chunks for key words, terms or acronyms that need to be defined.

Don't be shy – if you are not sure what the word or term means, there is a chance someone else at LPL does not either.

*Note: During my years as an NBC News employee and writer, I learned that best practice is to assume your audience needs explanation and definition – even in instances one could normally assume every viewer already understood.*

As authors, we are writing for a very large audience and so we should embrace the same philosophy with our work here at LPL.

Add an entry into this section for all key terms.

**Advisor Reference:**



**Advisor Reference and Information Department Owner:**

This is where you will enter links to related content contained in various internal, online, and systems resources – including the *BranchNet Resource Center* or *lpl@work*.

**Information Department Owner:**  
Indicate in this field the department(s) or business unit(s) the SD originated.

**Locations to Link to and Articles to Link to:**

**Locations to Link to:**  
Enter the web page title and a hyperlink for related external and/or internal online information.

If there is a legitimate online report, blog, web page or site from an approved source about the topic(s) contained in your AT, include the name of the article or report, and a hyperlink.

**Articles to Link to:**  
Titles of other iknow articles that relate to this topic should be entered into this section.

LOCATIONSTO LINKTO			
URL Loc#	Block #	URL Page Title	URL to Page Outside iknow Knowledge Base
UL-1	B-1	Wikipedia – Cost Basis	<a href="http://en.wikipedia.org/wiki/Cost_basis">http://en.wikipedia.org/wiki/Cost_basis</a>
UL-2	B-1	LPL Operations Guide	<a href="http://lplatwork.corp.lpl.com/aboutus/businessunits/bdss/bdssinfomanagement/Pages/OperationsGuide.aspx">http://lplatwork.corp.lpl.com/aboutus/businessunits/bdss/bdssinfomanagement/Pages/OperationsGuide.aspx</a>
UL-3	B-1	BranchNet	<a href="https://security.lpl.com/Login.aspx?sc=LPL-BN-200-OK">https://security.lpl.com/Login.aspx?sc=LPL-BN-200-OK</a>

ARTICLE		
Block #	New KB Article #	New KB Article Title(s)/Summary Fragment Title
B-1	0000	<a href="#">Cost Basis Reporting for Realized and Unrealized Gains</a>

**Clarification Required:**

Content from an SD is often unclear, missing information, or grammatically incorrect; this can make the text impossible to understand.

In these instances, you will need to annotate the chunk containing the indistinguishable content.

Here is the process by which you should flag information that requires clarification:

- Use the following acronym (formatted: “[CL-#]”) at the bottom of the cell containing the content
- Move down to the “Clarification Required” section and enter the “CL-#” in the first column, the C-# in the second column, and a detailed description of the clarification request in the third column

CLARIFICATION REQUIRED		
CL #	Chunk #	What needs to be answered, more information provided, check if assumed
CL-1	C-5	Who is “They”? They – the forms? - gr - They – advisors?
CL-2	C-2	The last paragraph in this chunk is difficult to understand and bre



## 11. Redundancies

### Redundancies and Duplicate Content Elimination:

A redundancy is just what it sounds like: duplicate content, contained either (or both) within your SD(s) or in a previously written article.

Redundancies may be:

- Within a chunk
- As large as a chunk
- At times an entire SD may be redundant information to another SD or article

### Find, Eliminate and Track Redundancies:

#### Finding a Redundancy:

You will use the following resources to help ensure that you eliminate duplicate information or content in your work:

- **The Redundancy Checklist** – a list of specific information that is commonly repeated in source documentation
  - Each listed redundancy has been found three or more times
  - The checklist contains SD topics that often contain duplicated content, as well as the actual text of the redundancies we often come across in our work
  - Be vigilant about checking your work against this list
- **Key word search:** Perform key word searches in *iknow* to pull up redundant content – this step is particularly important if your content appears suspect, but was not listed in the *Redundancy Checklist*.
  - You can find duplicate content by searching two or more key words that appear in a row from your source content, especially if the terms or words are unique enough to narrow your search
  - You can also search specific numbers, dates or unique terms that appear in your SD content
  - Be vigilant as redundancies aren't always exact duplicates

#### Fixing and Eliminating a Redundancy:

If the pre-existing article appears to be the correct location for the redundant information:

- Label the Information block field as a Redundancy (ie: "R-1" – while R-2 would be reserved for the second instance and so on)
- Fill in the Redundancy section along the bottom of the page.

If the content belongs with the article you are working on, a change may be made to the previously existing article, but it must be labeled specifically. Contact your editor for assistance.



## 12. Orphan Chunking and Article Naming

### Orphan Chunking and Article Naming:

Orphan chunks and the process of article naming are similar to each other in that both these content types are about putting information in its proper place.

#### Orphan chunks:

An orphan chunk is a chunk of information that does not belong in the AT you are currently working on, or it belongs in another article (whether or not that article already exists).

An orphan is a single Info chunk that needs a home somewhere else.

There is no orphan chunk section in the AT, but if you identify one within your AT, place an “O-1” in the “block #” column and copy the text into *The Orphanage* spreadsheet.

*The Orphanage* may be thought of as temporary housing (an excel spreadsheet) where orphans can accumulate and live until they are given a final home.

After labeling the block # for the chunk as an orphan by entering the O-#, go to *The Orphanage* spreadsheet paste the orphan chunk into the appropriate column and type in the SD-# and the O-# from your AT.

#### Article Name:

Give your article(s) a name. As described earlier, a single source document may contain two or more articles – that is, there is enough content of varying information that two complete articles may come from a single SD.

During the process of chunking and analysis of your content, you have had a chance to think about whether or not information appears to make sense, and whether or not the information belongs within the context of the main topic.

Now you should decide if all of the information belongs together. The article section allows you to name one or more articles.

Identify the number of articles within your SD content, and create a new row in the article Title section for the number of articles you have counted.

Assign an Information Map number (or “M-#”) to each article title by entering an M-# (in alphanumeric order) into each row in the appropriate field.

Then start at the top of the AT, and work your way down the “block #” column – labeling each B-# appropriately. You do not need to enter a B-# if there is an O-# or R-# already present.

THE ORPHANAGE			
ORPHAN #	SD #	Home Found (Article #)	ORPHAN CHUNK TEXT
O-1	SD-3982	A-1234	The new IRS cost basis regulations will become effective for equity securities only (The three-year IRS rollout plan includes cost basis changes for mutual funds and securities in DRP programs, effective January 1, 2012, and for all other securities, such as fixed income products and options, effective January 1, 2013)
O-4	SD-5524		Cost Basis Overview page on the Branchlet Resource Center: The long-term central repository for cost basis information, this page is updated weekly with new information (**for one-click access, click the cost basis banner at the top of the home page)

ORPHANAGE: No one job is too small to be done here!  
Light blue color indicates: costs are being paid  
Dark blue color indicates: costs are being received  
ORPHANAGE: No one job is too small to be done here!



## 13. Working with Content

### Content Rewrite and Rules for Consistency:

#### Content Rewrite:

After providing appropriate B-#'s to each chunk, start the process of content re-writing – this is the part where you simplify the content, while improving the quality and style.

You also want to identify items that may be better displayed in a table or graphic.

Refer to the *Content and Style Guide* for more information on how you can improve the quality and design of your content.

Once you have finished your content rewrites, give each Information block a block label – the chunk label needs to be a set of meaningful words that summarize or describe the chunk content.

#### Rules for Consistency:

- Each info chunk should be entered as a bullet point
- Do not use periods; If a chunk is a run-on sentence, use a semicolon to break apart the information or break apart the information into two bullet points
- No bullet point or chunk should be longer than 35 words
- Use italics, bold and underline conservatively -- for the names of books, magazines, or to add emphasis
- Acronyms
  - Do not use periods in acronyms
  - Write the acronym out upon first appearance in an article followed by the acronym in parentheses: Cash and Journal Utility (CJU); use the acronym in every reference that follows
- Use tables and graphics to help display your content in a more creative way

### Check and Track Your Work:

- Your article must not contain any spelling or grammatical errors. Please be diligent about running spell check, re-reading your work, and/or having a coworker check for any errors.
- Complete the Source Document Tracking Log



## 14. Next Steps

### What's Next?

Lastly, there are several things you will need to do before you are ready to try completing your own AT.

Here are the recommended items:

- Review the following 3 sections of your *iknow Author's Binder*:
  1. Sample Source Documents
  2. Sample Analysis Templates
  3. Sample articles
- Read the following essays in the *Research* section of your *iknow Author's Binder*:
  1. *Structured Writing as a Paradigm*
  2. *information mapping – A Research Note by Namahn*
  3. *Plain Language* – from the Center for Plain Language
- From the “*Instructions*” section of your *iknow Author's Binder*, read *Step-by-Step: How to Create an article*

Once you have completed the steps above, and your questions have been answered, you will try completing an AT of your own from several SD's. Using the sample SD's in the *Sample Source Document* section of this binder, try completing Analysis Templates for each.

