

DAILY HUDDLE TEAR SHEET PROCEDURES

What is the Daily Huddle Tear Sheet?

- The Daily Huddle Tear Sheets (DHTS) is an article page hosted in iKnow.
- Items typically covered in the DHTS are changes to policies and procedures, upcoming deadlines, and any relevant or important news.
- Service Managers use Daily Huddle Tear Sheets in their daily team meetings with Service Professionals.
- The goal of the DHTS is to ensure managers are sharing important information with their teams.

Information Management Team's Role:

- The IM team is responsible for verifying new information, and adding that information to the DHTS.
- The IM team is responsible for creating and publishing a new article page in iKnow using Adobe Experience Manager (AEM).

How to Create the Page

- I. Open [iKnow AEM](#).
- II. Navigate to the Daily Huddles folder: iKnow → Communications → [Daily Huddles](#)
- III. Click **Create** located on the right-hand side of the screen. Select **Page** from the drop-down menu.
- IV. Select the template titled **iKnow Daily Huddle Template**.
- V. After you select the template, you will be prompted to a page that hosts several tabs in the top left-hand corner of the screen. Two of those tabs are titled **Basic** and **LPL Custom Metadata**, and they will need to be completed before you can create the new page.
- VI. Under the **Basic Tab**
 - a. Add the **Title** in the following format: Daily Huddle Tear Sheet for mm-dd-yyyy (use the next business day's date)
 - b. Add **Description**: This is the Daily Huddle Tear Sheet for mm-dd-yyyy (use the next business day's date)

- VII. Move to the second tab, **LPL Custom Metadata**
 - a. Add Published Date: (the following business day).
 - b. Add Keywords: **DHE, DHTS, Daily Huddle Tear Sheet, Daily Huddle, Huddle, Huddle Topic, Tear Sheet**
 - c. Add Business Unit: **Information Management**
 - d. Add Review By Date: (select 1 year from the publish date).
 - e. Add Asset Steward: **Information Management**
- VIII. After these two tabs are filled out, you can now click the blue button titled **Create**.
- IX. Add **Text Component** to the page using the left-hand side menu options. This component allows you to write directly onto the new article page.

Note: There should only be four topics listed per DHTS. If you need to add a fifth one, remove the oldest topic from the article.

How to Publish the Page

Option 1: Publish Immediately

- I. Select the menu item on the left-hand side of the page you have just created.
- II. Select **Publish Page** from the drop-down menu.
- III. Once selected, this page is now live on the [iKnow Homepage](#).

Option 2: Schedule Activation Date

- I. Return to the [Daily Huddle folder in the backend](#).
- II. Select the page you just created, and navigate to the **Manage Publication** option at the top of the screen.
- III. Select **Publish**, then Select **Scheduling – Later**.
- IV. Input the date and time you want the page published.

Note: A DHTS page must be published no later than 8AM EST.
- V. Select **Next** – this page will now be published on the date and time you have selected.