

MorganStanley
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Knowledge Types Workshop

Service Training and Communications

Participant Materials

1/9/2014

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WELCOME

About the Knowledge Types Training

This training is targeted to Morgan Stanley Smith Barney Service Training and Communications personnel. It is most appropriate for Instructional Design/Technical Writers and Communication Specialists.

Timing

The timing for this module is as follows:

Lesson	Training Methodology	Timing
Five Knowledge Types	Discussion	30 Minutes
	Final Activity and Debrief	30 Minutes
Total Time		1 Hour

Five Knowledge Types

Purpose

Information Mapping Inc. is a research-based approach to the analysis, organization, and visual presentation of information. Ruth Colvin Clark and other leading academics in the field have conducted research to determine how knowledge can be organized and categorized according to the purpose for the audience. This method can be applied to the subject matter of any industry and applied to any medium, from paper to computer screens. Based on this research, Morgan Stanley Smith Barney Service Training and Communications (T&C) develops Service Central content based on five Knowledge Types to make information clear and accessible to the readers.

Objectives

Check each objective upon completion.

- Define the five Knowledge Types.
- Describe how the Scoping Document and Design Document identify objectives supporting each Knowledge Type.
- Identify which templates to use when developing Service Central content to support each Knowledge Type.
- Identify examples of each Knowledge Type.
- Describe how to organize links to documents supporting Knowledge Types on Service Central Jump Pages.

Five Knowledge Types

Instructional Designers, Technical Writers, Information Architects, and Knowledge Management Consultants all face one key challenge: **How to categorize and organize information.**

Based on research into how the mind actually reads, processes, remembers, and retrieves information, Information Mapping, Inc., techniques enable writers to break complex information into its most basic elements and then present those elements optimally for the reader. The result is a set of precisely defined information types that are consistent from writer to writer and from document to document.

Access the path below and complete the following exercise:

Path: Service Central / Managers Manual / T&C / 3-Instructional Design / Information / ID Handbook / Theory / Knowledge Types / Knowledge Types / Instructional Design Technical Writing: Knowledge Types (Job Aid)

Activity

Complete the table below by filling in the missing blanks.

Knowledge Type	Brief Description
1. Concept	<p>Answers key questions: What is it? Why use it? What is my role?</p> <p>Concepts include supporting information required to understand the topic, including background, descriptions, definitions, features and benefits, roles and responsibilities, rationale, etc.</p>
2. Facts	<p>Simple, factual information</p> <ul style="list-style-type: none"> Facts include definitions, glossaries, dates, times, places, statistics, specifications.
3. Process	<p>A series of events or phases over time with a defined purpose.</p> <p>Processes typically depict the “Big Picture.” However, they can be detailed depending upon the amount of information provided.</p> <p>Processes typically involving more that one person.</p>
4. Policy	<p>What can or can not be done.</p> <ul style="list-style-type: none"> Policy includes rules, guidelines, and exceptions. It

	must be “enforceable.”
5. Procedure	<p>Step-by-step documentation on how to perform a specific task.</p> <ul style="list-style-type: none">• Write procedures based on the “Orient, Action, Response” model, include screen prints, and include important notes or tips.

More Information on Knowledge Types

Additional information is available to you on Service Central, including templates and examples.

Path: Service Central / Managers Manual / T&C / 3-Instructional Design / Information / ID Handbook / / Theory / Knowledge Types / Knowledge Types / ...

Topic	Discussion																																			
Scoping Documents and Design Documents	<p>Scoping Documents and Design Documents help you to determine the Knowledge Type that each objective supports.</p> <p>Which colors are used in Scoping Documents and Design Documents to identify each Knowledge Type:</p> <table border="1" data-bbox="427 835 1271 898"> <tr> <td>Concepts</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <p>Concept: Orange</p> <table border="1" data-bbox="410 1010 1248 1121"> <tr> <td>Facts (statements bullet points) also can be an acronym or glossary,</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <p>Fact: Pink</p> <table border="1" data-bbox="410 1232 1256 1306"> <tr> <td>Process (flow chart)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <p>Process: Blue Green</p> <table border="1" data-bbox="410 1417 1256 1528"> <tr> <td>Policy (paragraph of policy)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <p>Policy: Green</p> <table border="1" data-bbox="410 1640 1256 1680"> <tr> <td>Procedures</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table> <p>Procedure: Blue</p> <hr/> <p>... / Knowledge Types Information / Examples / Project Management Documentation (bookmark) / GlobalCurrency Scoping Table</p>	Concepts							Facts (statements bullet points) also can be an acronym or glossary,							Process (flow chart)							Policy (paragraph of policy)							Procedures						
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Topic	Discussion
	<p>... / Knowledge Types Information / Examples / Project Management Documentation (bookmark) / GlobalCurrency Objectives Table</p>
<p>Templates Supporting Knowledge Types</p>	<p>The page entitled “Knowledge Types Information / Examples” provides many links to the templates that you should use to support each Knowledge Type.</p> <p>Please take a few minutes to click on the “Template” link for each corresponding Knowledge Type and familiarize yourself with each template.</p> <p>... / Knowledge Types Information / Examples / Service Central (bookmarks to the Service Central Content Pages table)</p> <p>In Scoping Table vs. Objectives Table, why don't the lessons 1 and 2 match up? In objectives table, lesson one is About Global Currency and lesson two is Product Overview, and Lesson Three is Branch Operations Procedures. Whereas in Scoping Table, lesson one is Global Currency Overview</p> <p>I need to look over the style guide. They seem to bold action words in the documentation and manuals.</p> <p>In the Objectives Table, what does the keys mean (i.e. H, M and in the title bar, there's BM, CM, CAM, BSM, SSA, DSA, etc.)</p>
<p>Service Central Examples</p>	<p>On the “Knowledge Types Information / Examples” page, please refer to the Service Central Content Pages table and investigate the examples of Service Central pages created to support each knowledge type.</p> <p>Space is provided for your notes below:</p> <p>Examples are REALLY good information to help start a project.</p> <p>What is the definition of IDEAS?</p> <hr/>

Topic	Discussion
	<hr/> <hr/> <hr/> <hr/> <hr/> <p data-bbox="412 548 1333 625">... / Knowledge Types Information / Examples / Service Central (bookmarks to the Service Central Content Pages table)</p>

Service Central Jump Pages

On the “Knowledge Types Information / Examples” page, please refer to the Service Central Jump Pages table and investigate the example of the GlobalCurrency Jump Page.

Access the path below and click the appropriate link to view the Service Central Jump Page example.

I went to here: <http://msdwolweb.msdwis.com/index.htm>

It's the training an communications resource guide under Job Aids.

Path: Service Central / Managers Manual / T&C / 3-Instructional Design / Information / ID Handbook / Theory / Knowledge Types / Knowledge Types Information / Examples / Service Central Jump Pages / GlobalCurrency Jump Page

Activity

For each Knowledge Type below, indicate where to post the link (Information or Action) on a Jump Page.

Knowledge Type	Information or Action (Circle One)	
1. Concept	Information Examples are REALLY good information to help start a project. What is the definition of IDEAS?	Action
2. Facts	Information	Action
3. Simple Process	Information	Action
4. Complex Process	Information	Action
5. Policy	Information	Action
6. Procedure	Information	Action

Getting a bit confused on this. Please go over again.

Determining Knowledge Type Activity

In this activity, you will review content, determine the corresponding objective, and select the appropriate Knowledge Type for each objective you identify.

Special Instructions

To complete the activity, do the following:

1. Your SME just forwarded over some information regarding your project. (Read the “Content” below.)
2. For each sentence, write the Knowledge Type in the parenthesis following each sentence.
3. Based on the content you have received, capture the course objectives on the Design Document Worksheet in the appropriate section based on the Knowledge Type the objectives support. (Your facilitator will distribute the Design Document Worksheet.) Work on the activity for 10 minutes.

Your facilitator will debrief the activity after 10 minutes.

Content

For clients who want broader access to foreign currency markets and appreciate the associated risks, GlobalCurrencySM is a simple and convenient solution (). Before engaging in foreign exchange transactions, clients should be suitable for the product and should demonstrate that suitability by understanding the associated risks and paying close attention to market, credit, sovereign and liquidity risks (). Only Series 7 licensed Financial Analysts can determine if a GlobalCurrency investment is suitable for a client (). GlobalCurrency deposits can be purchased in 10 of the world's most commonly traded currencies, including the Euro and Japanese Yen (). GlobalCurrency provides many features, including cash diversification, which helps to diversify a client's cash holdings across a variety of currencies which may fluctuate against the U.S. Dollar (). From MS 360°, access the client's account and verify that enough currency exists to fulfill the wire out request (). There is a \$5,000 (U.S. dollar equivalent) initial and subsequent deposit minimum (). From MS 360°, access client's existing FX cash futures account and verify that enough currency exists to fulfill the transfer request (). You must complete a number of steps to transfer positions from account to account and first step is to verify the position the client requests to transfer in MS360 (). The client visits the FA to purchase the product; the FA makes the sale and forwards the paperwork to the Branch Operations; after funds are received, the contact person noted on the Expect to Receive Wire Form and the Branch Service Manager will receive an email from GWM Operations confirming that the funds have been received (). There is a \$50 charge for all outgoing foreign currency wires ().