



Technical & Functional Specifications

THE FOLLOWING ARE EXAMPLE PAGES OF A FUNCTIONAL AND TECHNICAL SPECIFICATION DOCUMENT.

OVERVIEW

The Functional Specification is intended to give a detailed description of the functional behavior of each page on the CLIENT System. It is not intended to provide significant details on the underlying implementation. This document will be used by the Organic production team in developing and testing the behavior of each page, and by the CLIENT team as they take over the system maintenance and operation.

Each page will be described in the following form at:

- **Name** - The name of the page used in the schematics description
- **Section** - The major section of the site (Funnel, Online Application, etc)
- **URL**- The root-relative URL to the container page
- **Participates in Use Cases** - a list of the use cases this page is used in
- **Events**: The page events this page needs to handle. There are two types of events, global page events and form-specific page events. Global page events are described as:
 - **Init** - Page initialization (happens once)
 - **Load** - every page load (can happen several times)
 - **Submit** - form data submissionForm-specific events will be described with labels matching the corresponding schematics.
- **Data Fields**: A table describing any form input from the user (including system-generated hidden fields).
 - **FieldName**
 - **Input Type** (Text, checkbox, radio) . If there is an array of information, it will be denoted with an array constructor: "[]". Two dimensional arrays will be denoted as "[,]"
 - **Data Type** (int, string, memo, and arrays as above)
 - **Data Length** (where applicable)
 - **Validation Rules** (Regular expression, Required / optional, validation notes)
- **Description**: Overview of the page's purpose
- **Notes**: Any special implementation notes for the page
- **Errors**: Any errors this page is expected to display and handle in the routine course of operation.
- **Alternate Page Views**: In some cases, the schematics refer to multiple pages in situations where they can be more efficiently combined into a single page. One example of this is for confirmation pages. In these cases, the alternate schematic names will be listed as alternate page views.

The Regular Expressions for the validation rules are expressed as a condensed Perl5 regular expression. Key character classes include: \w - Alphanumeric (word) character \d - Numeric [0-9] character \s - Whitespace . - Match any character

These character classes will be expressed with the following modifiers: + - one or more of the previous character * - 0 or more of the previous character ? - 0 or 1 of the previous character

All other characters in the regular expressions should be interpreted as string literals.

ALL PAGES

All pages will be invoked by a page control. This page control will be responsible for:

1) Establishing the template to be used 2) Establishing the content source 3) Optionally loading any meta-data (name / keyword /title information) 4) Assembling the page content 5) Returning the content to the user

This process will be described in more detail in the technical specification.

ANALYTICS SUPPORT

All pages will have two features (inherited from a single Base Page) to support analytics:

A configurable line of HTML inserted into every page (set in web.config)
Code that only emits this HTML during initial page loads, and not during postback events.

We expect that the configurable line of HTML code is most likely going to be a reference to an external javascript code library that will synthetically generate a reference to a tracking server (e.g. WebTrends DCS). This code will only be triggered during the initial page load and not during postbacks to avoid double or triple counting the traffic on pages with forms.

STATIC PAGES

The following pages will not have dynamic elements beyond the basic page description, and so will not be discussed in detail here:

Page Name	Root-Relative URL
Download Flash	/downloadFlash.aspx
Privacy	/privacy.aspx
Our Firm	/AboutUs/default.aspx
Our Beliefs	/AboutUs/beliefs.aspx
What We Do	AboutUs/what.aspx
Our Managers	/AboutUs/managers.aspx
Timeline / History	/AboutUs/timeline.aspx
Just the Facts	/AboutUs/justFacts.aspx
FAQs	/AboutUs/faqs.aspx

HOME PAGE

Page Detail

Name: Home Page Section: Main URL: /default.aspx Participates in Use Cases:

- U1.1.1: Login - Prospects
- U1.1.2: Retrieve Forgotten User Name / Password

Events: -

-Load

- . If the web.config file indicates the cookie elimination code is enabled, insert a hidden link to the cookie elimination page.

-Submit

-Pass login credentials directly to CLIENT Extranet -If the User has no Return Registered Visitor cookie, system will create and store a new Return Registered Visitor Cookie.

Data Fields:

Field Name	Input Type	Type	Length	Validation Rules
Username	Text	String	12	\w+, required
Password	Password	String	24	\w+, required

Description:

This is the main homepage for the site. Users will be able to log in here, and be forwarded to the current CLIENT extranet site. The CLIENT extranet site will be responsible for handling authentication logic and errors. The page will also contain a link to the pending user login area so that users with pending applications can submit them.

This page will also contain a hidden link, disguised within the page design. Clicking on this link will reset any site-specific cookies (termination, acceptance, etc) and invalidate the user's session. This hidden link will be activated / deactivated by an application setting in the web.config file.

Notes:

Flash Detection either must happen at this page-level, re-directing user to a "you need flash" page, or the main Flash movie on this page must display alternate content informing the user that Flash is required. This will be handled via in-page javascript detection / redirection.

Website Crawlers (e.g. the Google Spider) must not be redirected away from the site.

This page will not directly display any error messages related to authentication. These will be the responsibility of either the pending application login page or the CLIENT extranet login page.

Prospect Report Details

Section: Admin URL:

/Admin/userDetail.aspx

Participates in Use Cases:

- U4.6.1: Generate Prospect Report

Events:

-Init

- If called in print context, load print version template
- Load each user's detailed response information into the page

Description:

This page contains the detailed information about a particular prospect. It is derived from the general Prospect Report.

The page header re-capitulates the Administrator's selections from either Prospect Report Full Query or the main Admin page.

The page results are the detailed information entered into the system.

Data displayed for this user includes:

User ID: [userID]
Name: [Firstname, lastname]
Prospect Status: [status]
Application Status: [status]
Date app saved/submitted: mo/day/yr
SS#/ Taxpayer ID: [Digits]
Address 1: [address1]
Address 2: [address 2]
City: [cityname]
State/Province: [statename]
Country: [countryname]
Postal code:[12digits]
Phone: [String]
Fax: [String]
Age: [age]
Marital Status: [status]
Rent or own: [rent/own]
Number of dependents: [#]
Ages: [age x, age y, age z]
Account Manager Selections:
1. [manager name 1]
2. [manager name 2]

Overall Score: [score value]

Page score

Belief in stock picking xx
Time Horizon xx
Tolerance Risk (education) xx
Tolerance Risk (loss) xx
Able to delegate xx
Commission Structure xx
Communication Frequency xx
Specialized needs xx
Basic Needs xx
Basic Needs detail
Income: [range]
Cash accounts: [range]
Investments: [range]
Non-liquid assets: [range]
Household debt: [range]
Net worth: [range]
Investable assets: [range]

There will also be a detailed breakdown of all the questions the user answered as well as the user's responses and the score associated with them at the time of the response.

Notes:

- Prospect and Dependent Ages cited are calculated by referencing the current date against the date of birth specified in the application process. -User scores will reflect the scores recorded at time of completion.
- User Questions and Responses may have been edited, and are not guaranteed to be precisely the same as the questions and responses seen when the user answered the question.
- Print template will be able to support multiple users.

Alternate Page Views:

- Print version of page