

Master list of functionality & features

Level A Accessible site

With feature to increase & decrease font size [bespoke development]

Landing page:

Remember Me (cookie set for 3 months) [use standard module]

Hedge Funds site:

Login & Registration system [bespoke development to meet current requirement] See explanation

Across all sites:

Disclaimer system [standard module]

Literature publishing; esp. factsheets; most viewed; most recent [standard module with some bespoke development]

Resource library to host suite of frequently used/available imagery, banners, documents etc. [standard module]

Webcasts: In-line Asset TV; most watched, most recent [standard CMS functionality with bespoke development for most watched/recent]

Campaign Ad Manager [standard module]

Content Sharing [standard module]

Press release & News publishing [standard module]

Polls with live results shown [standard module]

Feedback Form to capture 'Treat Customers Fairly' Feedback [standard module]

Email sign up to sign up to a variety of email newsletters. Automatically sent to Reportmail [bespoke form talking to Reportmail Web Service]

Automated sitemaps [standard module & bespoke for top level site map]

Glossary [standard module]

Frequently Asked Questions [standard module]

I-framed content called from Funds Library for charting and detailed fund page information [standard cms functionality]

Prices feed rendering [bespoke development for CSV updating system]

Competition Form submission page and CSV download of entrants.

Potentially i-framed Form code from Gate. [standard module/standard CMS functionality]

Ability to update design (skins) with some seasonal design changes for interest [standard cms functionality, bear in mind when creating Skins]

Request a call [standard module]

Surveys [standard module]

Featured funds on homepages [standard cms functionality]

Print this page dedicated print-friendly CSS [bespoke development]

Tracking analytics code on each and every page [standard module]

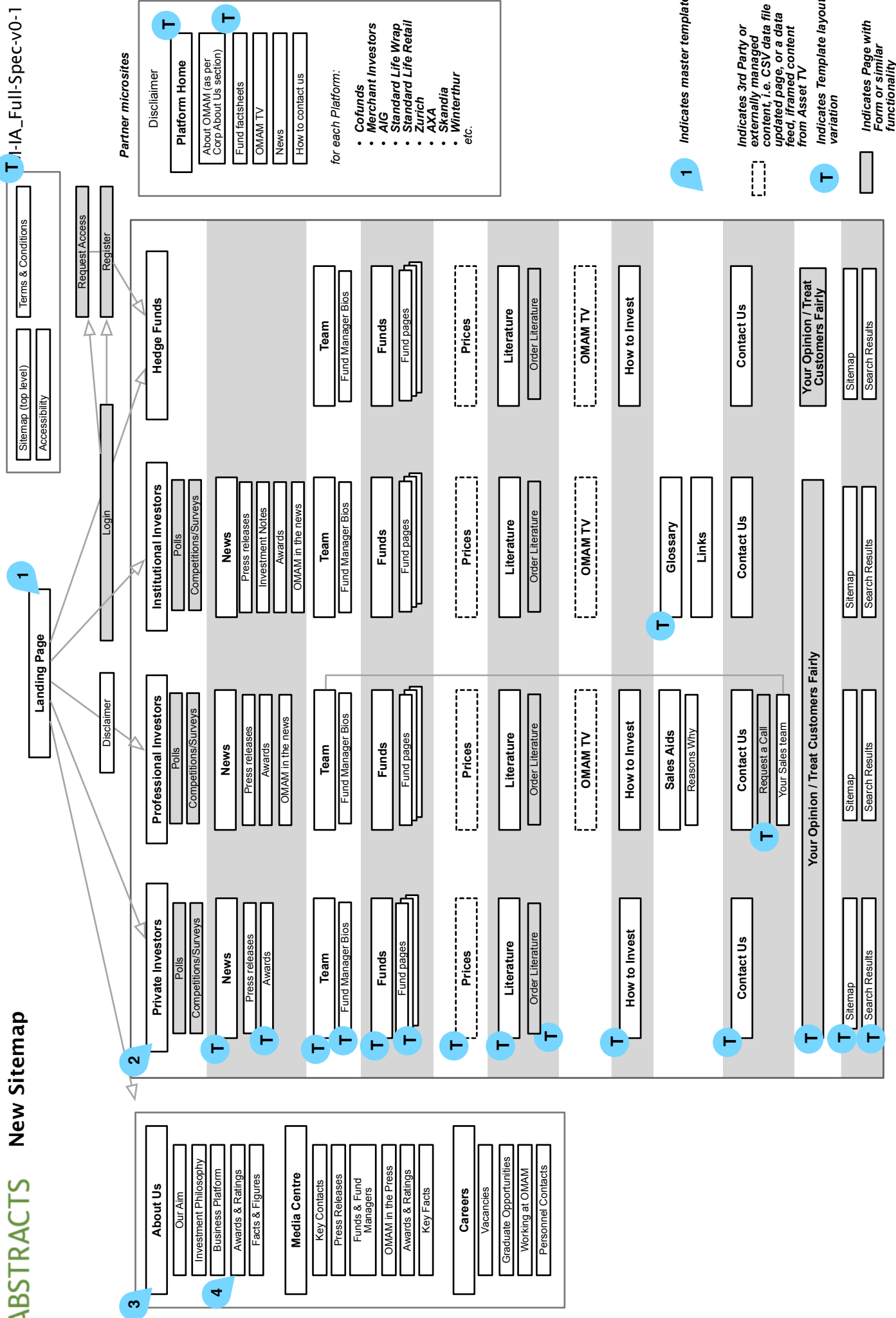
Literature Request forms [bespoke form]

Platform Microsites

Microsite publishing & Content sharing [standard module]

Development/Staging Server

For testing code updates separate to the live environment etc. (password protected). [offered as part of build anyway]



GENERAL:

Internal OMAM IT issue

OMAM IT have adjusted their proxy server settings so that some internal users of the website (Sophie!) can't see updated content on the live site (Asset TV footage etc.). This needs to be resolved as it is critical the web team are able to see their changes to the live site...

Design

Fixed layout, centred, to 900-1,000 pixels width. Homepages ideally to be non-scrolling on 1024 x 768 screens. Level A accessibility.

CMS server requirement

1. The CMS is a DotNetNuke (DNN 4.6.2). NET 2 application using a SQL Server 2000 database. All files reside under its own virtual folder which we will provide during development.
2. The site is a standard .NET2 web application server running Windows 2003 Server with IIS 6.
3. Application Pool settings in IIS are no different to any other .NET application with the Network Service account having usual permissions to the web app.
4. The database connection settings are all maintained within the applications web.config and currently point to a SQL Server 2000 database server.
5. The application can run across load balanced web farm environment although the web.config will require a bit of 'tweaking'.

WEBSITE & WEB SERVER ACCESS:

Development webserver

This will be hosted and managed by Abstracts and offer both the password protected CMS and the front-end view of the site (hidden URL, or this can be made password protected if required).

Live webserver

The hardware will be hosted and managed by OMAM IT. Basic sys admin tasks such as restarting IIS, domain pointing etc. will be the responsibility of OMAM IT. Abstracts will manage the website CMS, database and relevant SMTP settings etc. Abstracts have access to the server via FTP and via PC Anywhere (to certain IP addresses only).

'Public' sites:

Disclaimer

This will put pages behind a legal disclaimer acceptance page. Deep linking URLs are required to allow for putting links in email newsletters to take users direct to pages by passing the disclaimer. Otherwise when accessing the site the pages will need to be behind a search engine friendly disclaimer page allowing the content of the sites (except for the password protected ones) to be spidered & indexed.

Remember me

This module will add a 'Remember me' option to the landing/home page of a website. When checked it sets a cookie for 'x' days. This will then direct the user to the selected page/section on their next visit to the URL www.omam.co.uk.

NB the OMAM.co.uk link in the top nav will need to bypass this and link users directly to the landing page so they can choose a different site if they want.

'Private' sites:

Both the Institutional and Hedge Fund sites will be behind a password protected, registration-only system. See following pages for explanation of proposed solution.

Institutional & Hedge Funds sites need to both be password protected sites. Users will register for the site(s) opting for one or the other, or both. OMAM will grant permission to one, both or neither site. Users will need to be able to login to update their details and change their password. The admin system needs to store all historic requests even if not granted permission (for reference) and have an optional 'notes' field to add a comment when declining access. If a user is declined for both then they will need to re-register with more valid information to be granted access. Each registration will need a reference ID so if someone calls to ask why they haven't been granted access it can be traced by name or ID no.

Q: Is it likely that a user will be granted permission for one site but fail to qualify for the other? If Y, then we need to cater for someone updating their registration information/details and re-requesting access to OMAM.

Q: Should OMAM be notified when a user updates their information (email address & name say) as they could register with one set of information and then change it to a hotmail account under the name of 'Mickey Mouse'. Alternatively, users are not allowed to edit certain fields so that if they change email address they have to request OMAM do it, or they would need to re-register in the case of if they moved to a completely new company.

When a user is registered for one site but not the other when they try to access that site they will be notified that they don't have access to that site and that if they want access they need to click the 'Request Access' button and wait for the email confirmation.

NB The above functionality is bespoke development. Our standard registration module would require the user to have two different usernames but they could set the same password... In essence it would be two separate registrations systems...

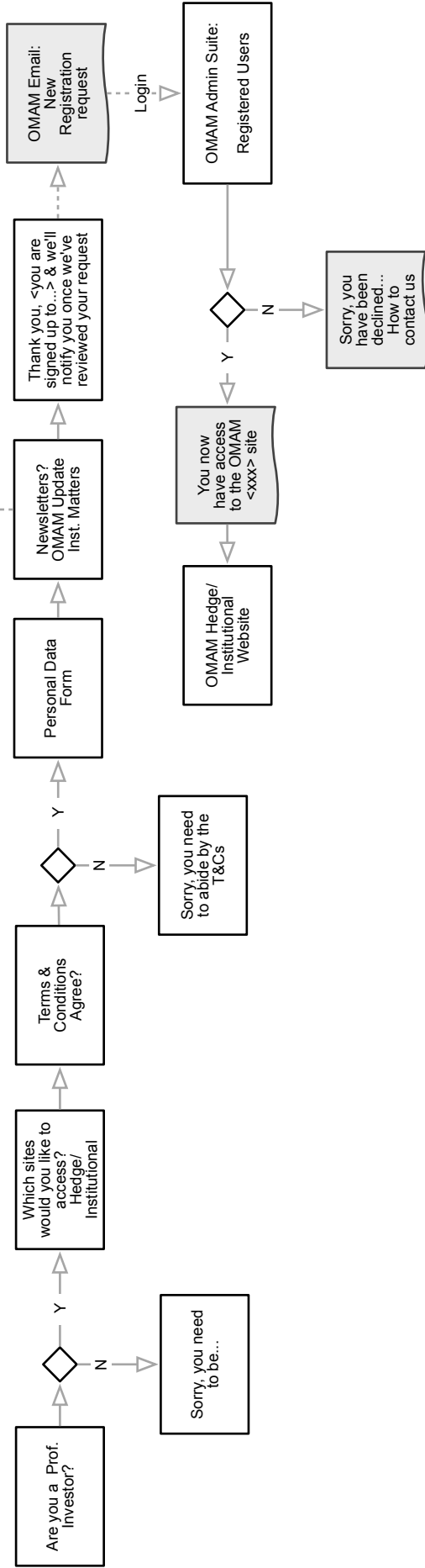
Registration alerts to be sent to info@omam.co.uk

Example of Admin view of registered users

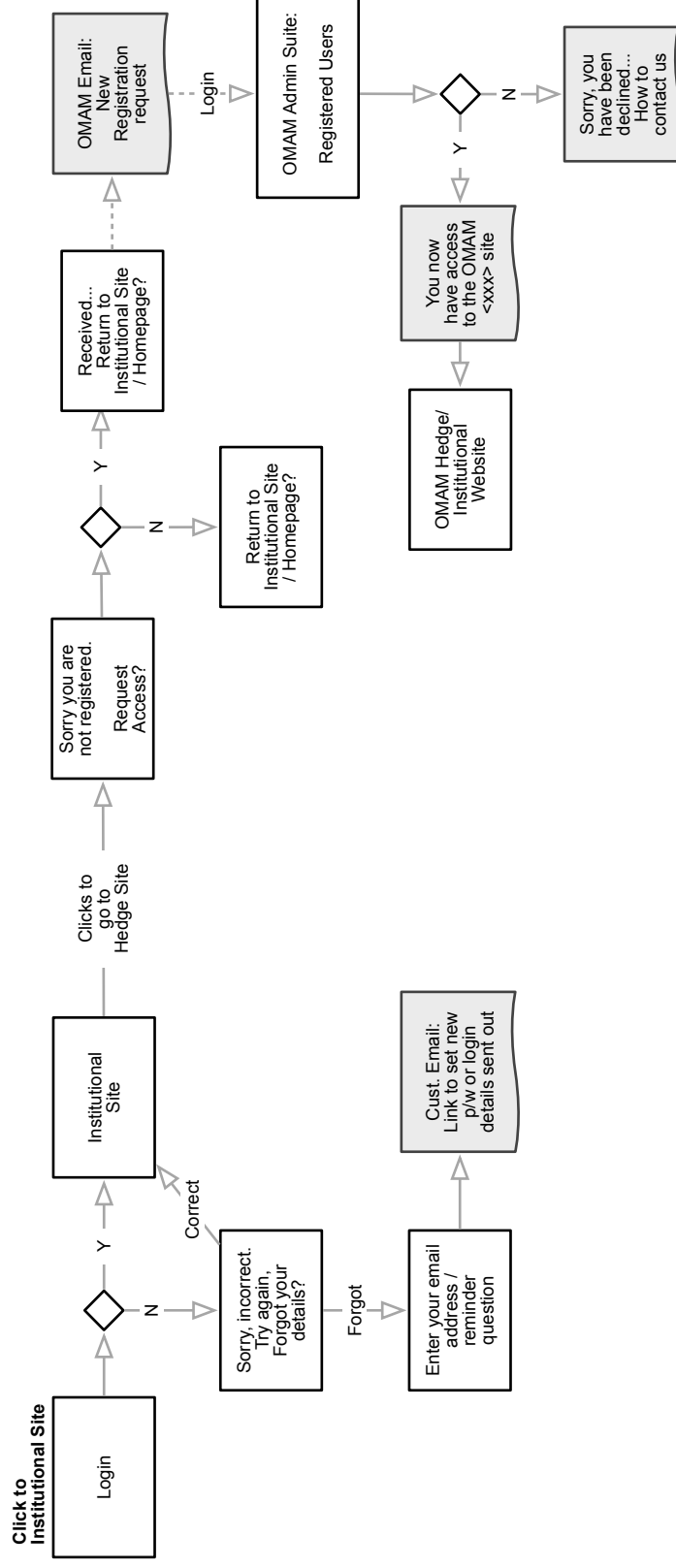
Date	Registered Users	Institutional	Hedge
01 February 2008	Guy Hands	Y	-
01 February 2008	Sheila Knees	Y	Y
01 February 2008	Bob Shin	-	Y
01 February 2008	Sarah Elbow	N	Y
01 February 2008	Frank Shoulder	N	N
01 February 2008	Lisa Nails	N	-

Each name links to editable profile & permissions for each with ability to delete users

Registration Process



Scenario for a user registered on one site but not the other & forgotten password/username



OLD MUTUAL
ASSET MANAGERS

23rd March 2008

Lorem ipsum dolor sit amet consectetur nonummy lorenzino. Interdum volgus videt, est ubi peccat. Si veteres ita miratur.

Imagery

INVESTMENT INFORMATION

Please select...

Private Investors

Professional Investors

Institutional Investors

Hedge Funds

☐ Remember my choice (cookie set for 3 months)

CORPORATE INFORMATION

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Graduate program

Working at OMAM

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Old Mutual Asset Managers is part of [Old Mutual Plc](#)

Footer Text, Copyright

1

Bold, strong links to the main sites are the prominent feature of this page

2

Need to make sure these sections are not lost however

3

This link could also be in the top nav area titled 'Old Mutual Plc'

Site audience
'type indicator not
required'

1

23rd March 2008

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Bread crumb Trail

Investor websites
Visit the right site for you

Private Investor

Professional Investor

Institutional Investor

Page Title area

Print this page

Page Content

Sidebar Promo area,
Related info etc.

Banner Ad space

Footer

Search at this level will need to search all these top level sections that are outside the disclaimers (TBC re. Media which might have to be behind a 'I am a member of the press' disclaimer

2

Panel at top level enables users to go straight to the site of interest when they are ready

3

Professional Investors

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Animated Flash Panel

Latest News

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[Read more](#)

I just want to...

Old Mutual TV

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Imagery

Fund Focus

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Interdum volgus videt,
est ubi peccat. [More](#)

How to Invest

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[Tell us what you think](#)

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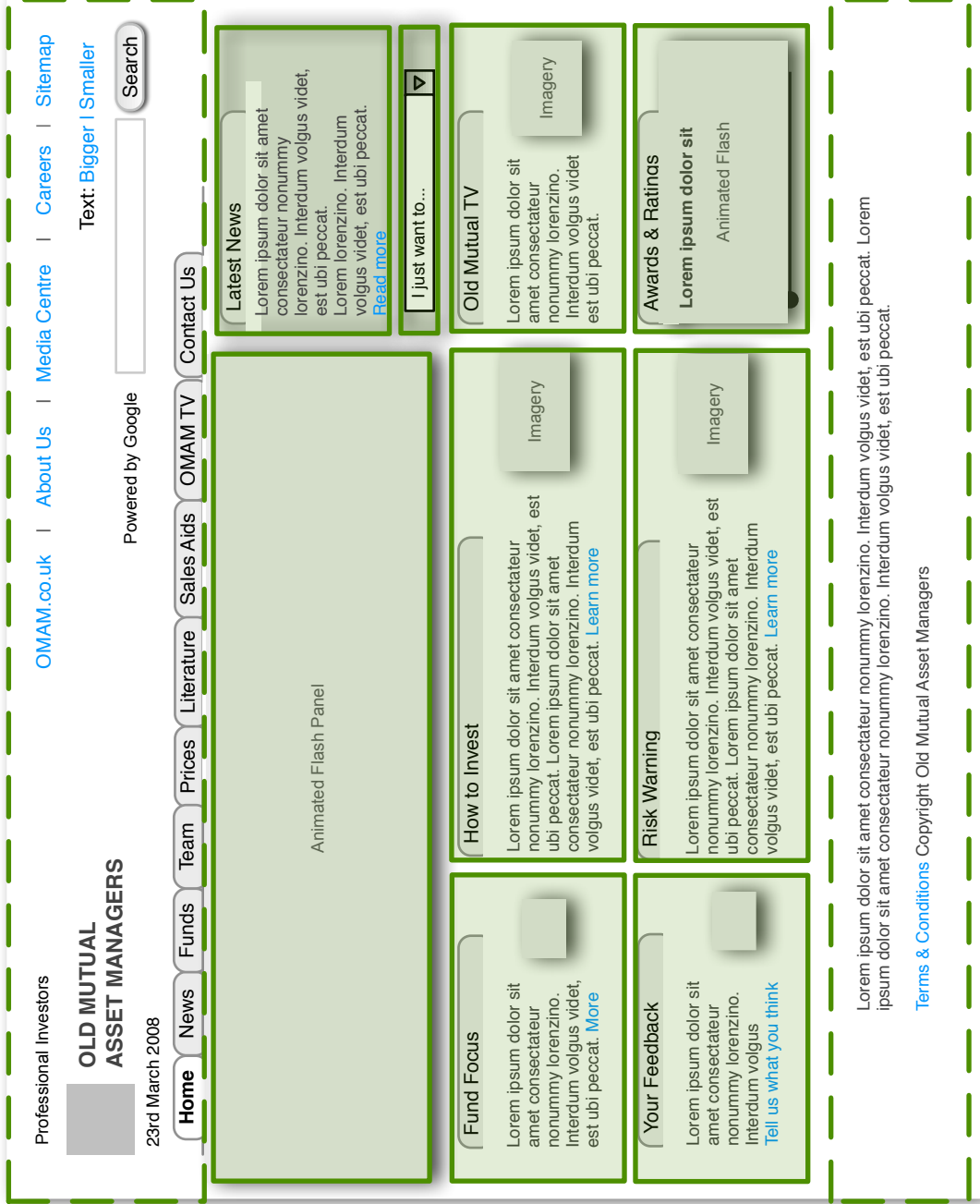
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ipsum dolor sit amet consectateur nonummy lorenzino. Interdum volgus videt, est ubi peccat.

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1 Main navigation tabs need to have different on, off and 'on mouse over' states

2 Content of the drop down to be confirmed. It jumps user straight to certain pages on the site

3 Exact content of Panels TBC, one could be Top 5 downloaded Factsheets



1 Common Header area
When building bear in mind the requirement to make 'seasonal' changes to the imagery/design in this area (Christmas etc)

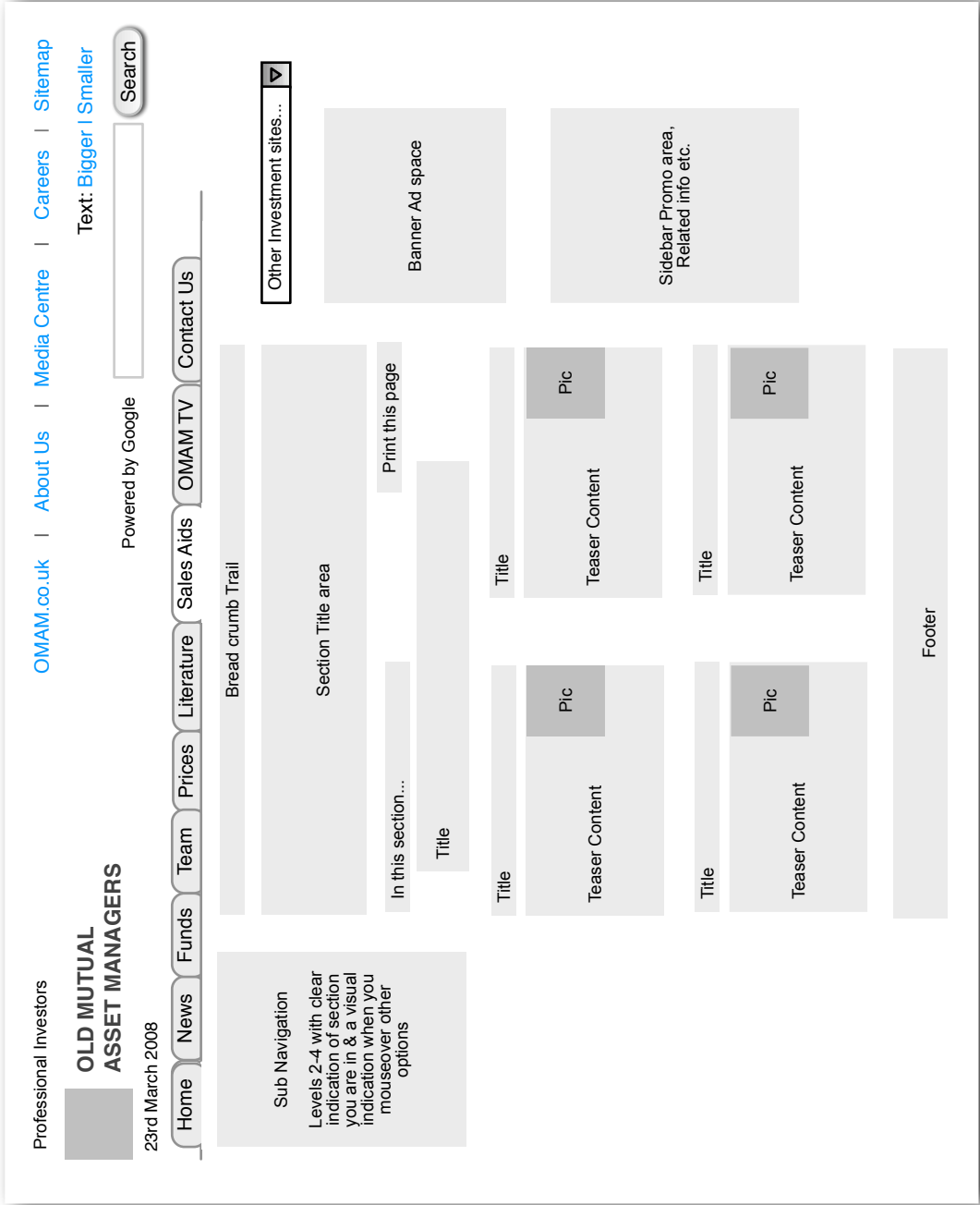
2 Fixed Flash panel up-datable in the CMS

3 Fixed drop down menu, items and links can be editable

4 Standard content panels single or double width with or without Imagery as required.

5 Animated Flash panel cycling through the awards and ratings.
Would be nice to have a slider player status so that the user could draw it back to the beginning

6 Common Footer area



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Sub Navigation

Levels 2-4 with clear indication of section you are in & a visual indication when you mouseover other options

Bread crumb Trail

Page Title area

Title

Copy

Sub Title

Copy

Bullet List

Copy

Sub, sub title

Tabular information	Tabular information	Tabular information
Tabular information	Tabular information	Tabular information
Tabular information	Tabular information	Tabular information
Tabular information	Tabular information	Tabular information
Tabular information	Tabular information	Tabular information

Copy

Print this page

Pic

Other Investment sites...

Banner Ad space

Sidebar Promo area, Related info etc.

1

A house style guide for the site needs to cover the basic elements shown and any others that are frequently used or that are needed to give the content that little extra bit of polish

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Other Investment sites...

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All	UK Equity	Bond Funds	Global Equity	Fund of Funds	Offshore	
	Fund	Latest Price	Factsheet	S&P	Independent Ratings	Citywire
	Asian Select	32.45%	PDF	AAA	AA	OMAM TV 23rd Jan 2008
	Asian Select	32.45%				23rd Jan 2008
	Asian Select	32.45%				23rd Jan 2008
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	Asian Select	32.45%				23rd Jan 2008

Risk Warnings

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Footer

[illegible]

[illegible]

Sidebar items may include a 'Newsletter sign up' panel, TCF Feedback Panel that is everywhere

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Fund Range

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Request Literature Panel

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All	UK Equity	Bond Funds	Global Equity	Fund of Funds	Offshore
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
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Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
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Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full
Name of the Fund	Factsheet Report	Factsheet	Short Report	Report & Accounts	Simplified Prospectus Full

Footer

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CoFunds

Text: [Bigger](#) | [Smaller](#)

Welcome to the range of
Old Mutual Funds...

Lorem ipsum dolor sit amet
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lorenzino. Interdum volgus videt,
est ubi peccat. [More](#)

Fund Focus

Lorem ipsum dolor sit
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nonummy lorenzino.
Interdum volgus videt,
est ubi peccat. [More](#)

Latest Factsheets

- [Name of Fund - January](#)
- [Name of Fund - January](#)
- [Name of Fund - January](#)
- [Name of Fund - January](#)
- [Name of Fund - January](#)

Your Feedback

Lorem ipsum dolor sit
amet consectateur
nonummy lorenzino.
Interdum volgus
[Tell us what you think](#)

Latest Sales Aids

- [Name of Fund - January](#)
- [Name of Fund - January](#)
- [Name of Fund - January](#)
- [Name of Fund - January](#)
- [Name of Fund - January](#)

Splash Image & messaging

Old Mutual TV

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Imagery

Awards & Ratings

Lorem ipsum dolor sit
Animated Flash

Imagery

Imagery

Imagery

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1

Content for new microsite
homepages TBC!

2

Panels could show most
recent items for the
relevant funds that are
visible in this microsite or
be generic content across
all microsites.

Needs assessing as the
requirement may need
quite a lot of development
(former) or non at all
(latter)!

Last Updated Fri Feb 08 2008

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Fund	Strategy	Investment Pocess	Factsheet	OMAM TV
AI Saqr	Three word descri.	View	Factsheet	video
AI Saqr	Three word descri.	View	Factsheet	video
AI Saqr	Three word descri.	View	Factsheet	video
AI Saqr	Three word descri.	View	Factsheet	video
AI Saqr	Three word descri.	View	Factsheet	video
AI Saqr	Three word descri.	View	Factsheet	video
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AI Saqr	Three word descri.	View	Factsheet	video

Risk Warnings

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Banner Ad space

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	Quoted Bid Price (p) Today	Quoted Bid Price (p) Yesterday	Quoted Offer Price (p) Today	Quoted Offer Price (p) Yesterday	Price Change +/-	% Yield
OEIC funds						
Asian Select A Acc	214.90	219.91	226.26	231.47	-5.01	0.40
Corporate Bond A Acc	146.23	146.07	153.18	153.19	0.16	5.20
Corporate Bond A Inc	107.42	107.30	112.52	112.53	0.12	5.20
Dynamic Bond Fund A Acc	53.02	53.17	55.68	55.91	-0.15	6.30
Dynamic Bond Fund A Inc	45.89	46.03	48.20	48.40	-0.14	6.30
Equity Income A Acc	1599.78	1623.69	1682.26	1707.88	-23.91	3.60
Equity Income A Inc	671.60	681.64	706.22	716.98	-10.04	3.60
Ethical Fund A Acc	148.93	152.86	156.45	160.55	-3.93	0.90
Ethical Fund A Inc	135.82	139.36	142.68	146.37	-3.54	0.90
Ethical Fund C Acc	139.65	143.33	141.06	144.75	-3.68	1.60
European Equity A Acc	134.61	138.49	140.51	144.54	-3.88	0.60
Extra Income A Acc	141.01	142.72	148.23	150.07	-1.71	4.00
Extra Income A Inc	75.42	76.34	79.28	80.26	-0.92	4.10
Global Equity A Acc	118.47	121.88	123.70	127.22	-3.41	0.40
Global Strategic Bond A Acc	201.87	200.61	209.74	208.45	1.26	3.60
Global Strategic Bond A Inc	144.58	143.66	150.22	149.29	0.90	3.60
Japanese Select A Acc	73.01	75.22	76.60	78.84	-2.21	0.00
North American Equity A Acc	306.97	315.27	319.98	328.50	-8.30	0.00
Select Managed A Acc	3044.35	3094.15	3187.60	3239.52	-49.80	1.70
Select Managed A Inc	2109.90	2144.42	2209.18	2245.16	-34.52	1.70
Select Managed C Acc	3057.43	3107.41	3078.17	3128.27	-49.98	2.50
UK Select Equity A Acc	291.52	298.10	306.16	313.00	-6.58	2.00
UK Select Equity A Inc	198.27	202.75	208.23	212.88	-4.48	2.10
UK Select Mid Cap A Acc	126.39	129.46	132.71	135.91	-3.07	0.60
UK Select Mid Cap A Inc	119.45	122.35	125.42	128.45	-2.90	0.60
UK Select Smaller Co's A Acc	141.28	143.86	149.07	151.82	-2.58	0.00
UK Select Smaller Co's A Inc	137.63	140.15	145.22	147.90	-2.52	0.00

Old Mutual Dublin-based Funds

Our Dublin-based funds are managed by Old Mutual Asset Managers (UK) Limited, a sister company of Old Mutual Fund Managers. These are the latest published prices for Global Dynamic Fund (updated weekly) and UK Select Smaller Companies Fund (updated daily).

Fund	Currency	Price
Old Mutual (Dublin) UK Select Smaller Companies Fund	GBP	3.3716
Old Mutual Global Dynamic Fund	GBP	13.15
Old Mutual Global Dynamic Fund	USD	12.47
Old Mutual Global Dynamic Fund	EUR	11.85

1

Prices tables to be redesigned but structured as currently (unless otherwise instructed)

1

Panel links to new page to allow user to:
Select Fund Area
Enter number of copies for each fund
Repeat until ready to submit... ->
NB. Full prospectuses are available only as
downloadable PDFs. If for some reason you need a
printed version please contact ...

2

Literature Request Form

Please complete the following address fields and submit to receive your requested items.

Title

Surname

First name

Initials

Organisation

Address

County

Postcode

Country

Daytime telephone number

Email address

Data Protection Act: The details you have provided will be held by Old Mutual Fund Managers Limited and may be used to keep you informed of products and services provided by us which we think will be of interest to you.

☐ If you would prefer not to receive this information, please tick this box.

 Submit

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By Date

Most popular

By Fund

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January 2008

Photo

Equity Income Fund

Michael Gifford

3 mins (approx.)

Play

January 2008

Photo

Equity Income Fund

Michael Gifford

3 mins (approx.)

Play

January 2008

Photo

Equity Income Fund

Michael Gifford

3 mins (approx.)

Play

January 2008

Photo

Equity Income Fund

Michael Gifford

3 mins (approx.)

Play

January 2008

Photo

Equity Income Fund

Michael Gifford

3 mins (approx.)

Play

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Fund activity

Outlook

Impact of Credit Crisi

Control Bar

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