THOMSON REUTERS

Thomson Reuters Investment Advisory User Experience Group

Component Redesign

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Project

This project is a redesign initiative focusing on identifying, gathering ideas and improving user interface and interaction design patterns in order to solve specific design problems amd inconsistencies in the existing Thomson components with an eye towards making future enhancements for the new Thomson Reuters platform components.

Objective

- To identify common user interface and interaction design patterns that can be applied as future enhancements to the new Thomson Reuters platform.
- To provide new and improved ways of interacting with components.
- To apply the above to specific page types or "archetypes" of screens identified.

Target Audience

Not Applicable.

Target Platform

Thomson Reuters thin platform.

Approach

1. **Masterpages of Page types**
   Identify types of screens based on a complete analysis across all components.

2. **Interaction Types**
   Based on the interactions that apply to specific page types identify and categorize them as specific interaction types.

3. **Wireframe content instances**
   Vet out interactions with content instances and wireframe.

Signoff

....
Development,

....
UEG Stakeholder,

....
Other Stakeholder,
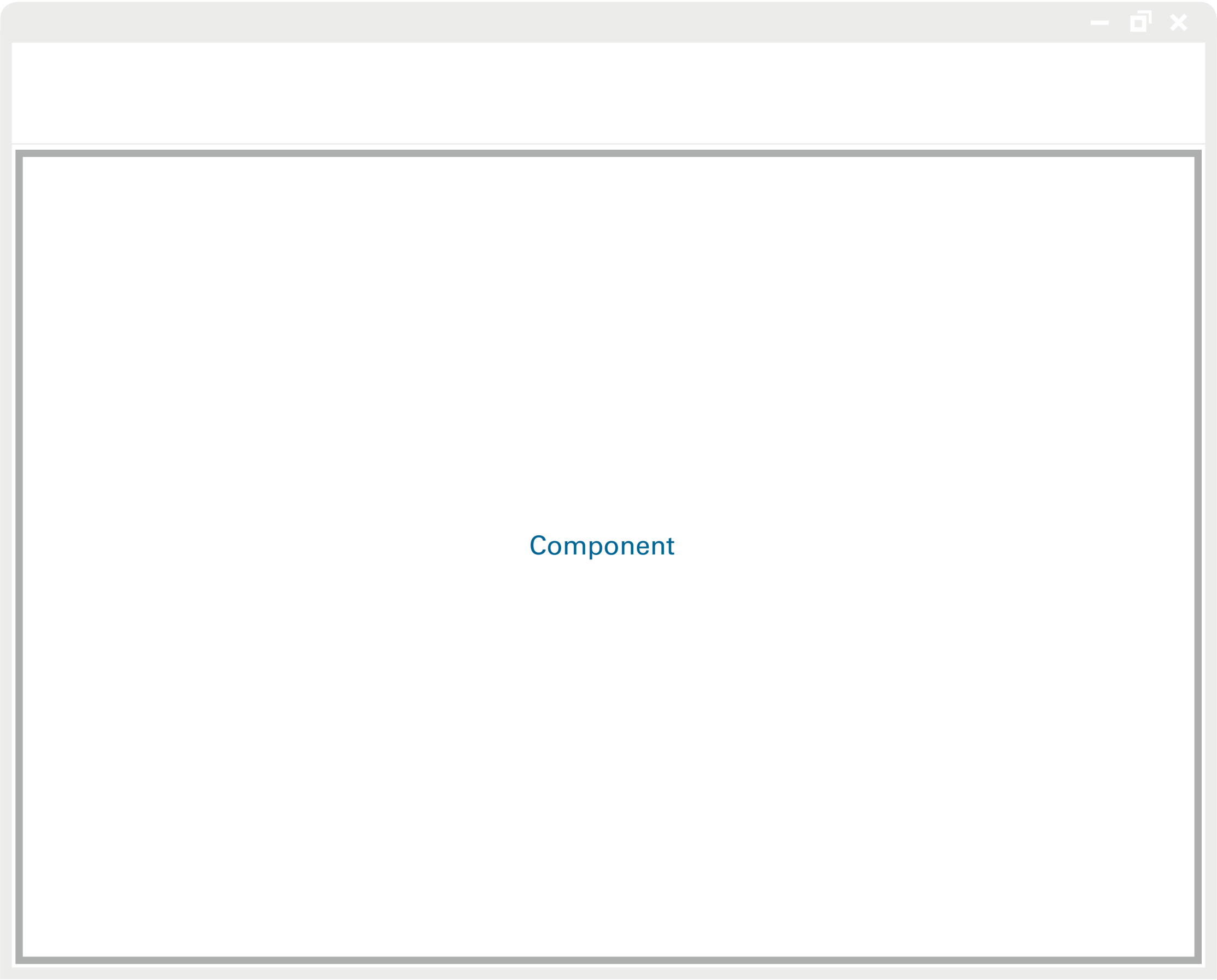
Component

Framework space

Component space

Framework and
Component space

Referential Page Type

Referential pages allow users to work within a specific, defined set of data or results, without making any changes to the original set. Referential content may be acted upon by engaging either referential filters or referential actions.

Referential Filters

Referential filters are used to view a specific, defined subset of the original set. Referential filters occur as either input and select fields for user-specified criteria (e.g., a *mm/dd/yyyy* date range) or as text links identifying default data subsets (e.g., *Q3 2007, Q4 2007*). Where contextually appropriate, both types may be used on the same page to allow users the ability to narrow down to a finely specified view of the original data set. Additionally, up to 3 levels of referential filters may be used.

Referential Actions

Referential actions are individual or batch actions that are applied to a single item or group of items within a data set without changing the original set . Referential Actions can be global or local.
Examples of referential actions are *download, save,* and *view prices*.

Link filters with tabs

Even though tabs are classified under "Link Filters", tabs should not be used for filtering through an "All" view but should be reserved to display either mutually exclusive content sets or information "facets".

When a filtering mechanism is needed rather than information facets, a different treatment without a tab construct should be used.

Link filters without tabs

Link filters displayed as linked text are rendered in forms other than tabs. Up to 3 levels of subset links may be used to allow users to drill down to a very specific subset of overall results. The top level filters may be rendered differently than lower levels as shown.

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Company Name | Component Name

— Header
— Referential Filters
— Link Filters with Tabs
— Global Actions

Summary

— Summary/ Overview

Heading

— Data   — Local Actions

Company Name | Component Name

| First level | First level links | Lorem ipsum | Link 4 |

— Link Filters with out Tabs

Summary
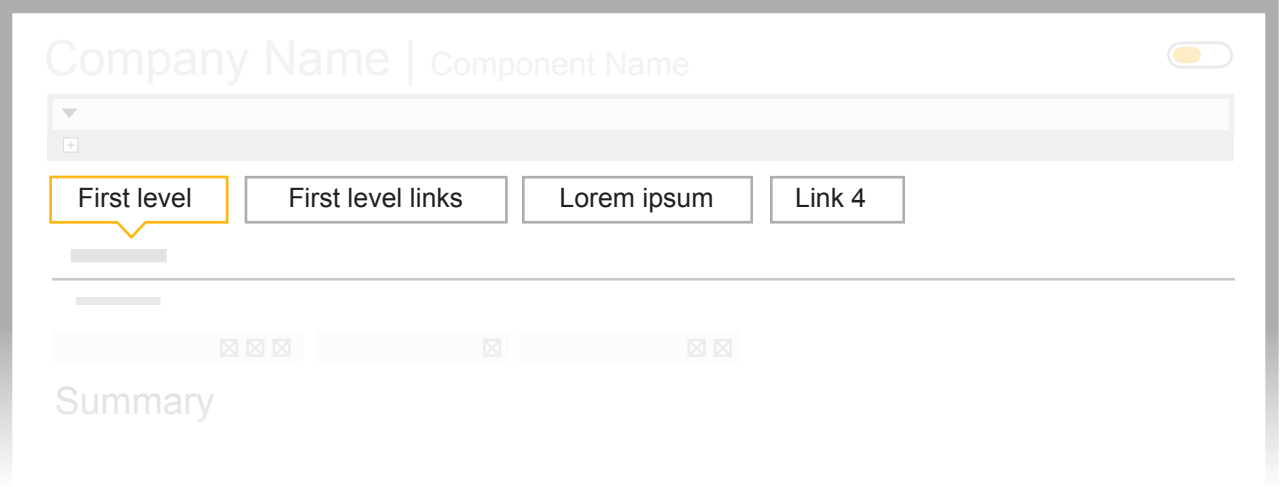
Interactive Page Type

The interactive page type is characterized by functional elements that act on a complete set of data or list of results. Interactive functional elements may be either interactive filters or interactive actions. These filters and actions either modify the results completely (Eg: Search pages) or permanently change the data set (Eg: Modifying portfolios or watchlists).

Interactive Filters

Interactive filters are used to change the highest level of relevant criteria, generating a completely new set of data or results. In regard to page hierarchy, these filters are most commonly placed near the top of the component space. Interactive filters may contain lookups, search, or other criteria inputs.

Interactive Actions

When applied to a current data or results set, interactive actions result in permanently changing the the existing set. Interactive actions most commonly appear below secondary filters, and where contextually appropriate may be visually grouped with the corresponding data. Interactive Actions can be global or local. Examples of interactive actions are add securities to portfolio list and delete securities from list.

NOTE: Interactive page types may also include referential elements.

Company Name | Component Name — Header

— Interactive Filters

— Link Filters with Tabs

Heading — Global Actions

— Data

Company Name | Component Name

First level   First level links   Lorem ipsum   Link 4 — Link Filters with out Tabs
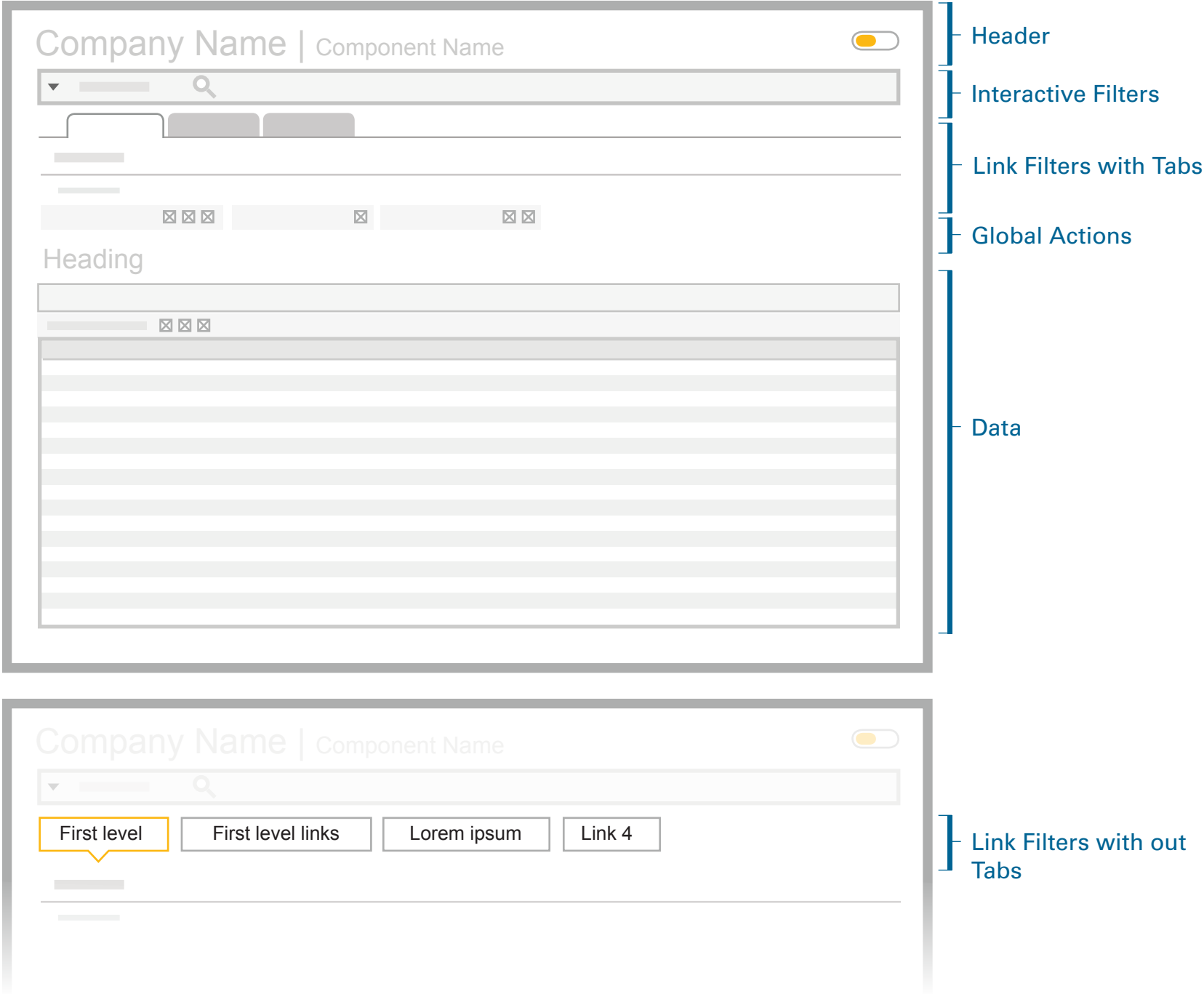
Calendar Page Type

The calendar page type consists of an advanced calendar control that displays data with 3 types of views - Weekly, Daily and Detail List view showing detailed information (More data columns)

Daily and Weekly views have the basic information listing the type, name and number of events while a list view shows more data columns (Eg: ticker, guidance data, mean, other actions). The list view can be viewed by extending the daily view with more detailed information or .

Using tabs in place of other representations
Even though "weekly" and "daily" are used for filtering through an "All" view, a tab construct is used here to represent these views as information "facets".

NOTE: Calendar page types may also include referential elements.

Company Name | Component Name

Header

Referential Filters

Link Filters

Data Filters with Calendar control

Data View
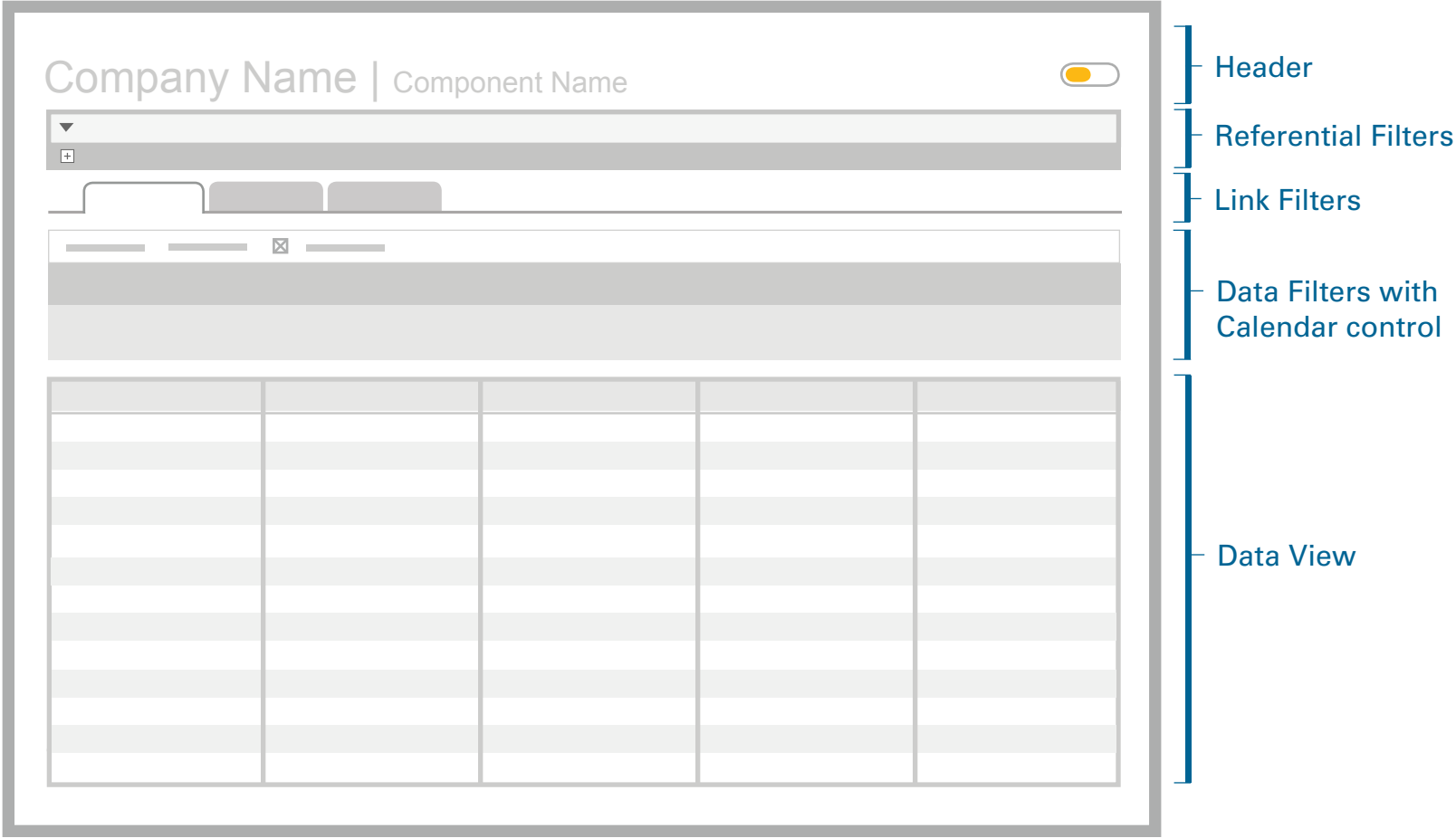
Mon Aug 5	Tue Aug 6	Wed Aug 7	Thu Aug 8	Fri Aug 9

Weekly View (default is 'This week')

am/pm	Mon Aug 5

Daily View (default is 'Today')

Data Views

Detail List View (more data columns)

Search Page Types

Search page types are characterized by functional elements that pull up a complete set of data or list of results upon searching and provide further filtering to refine the search results.

Simple or Advanced Search page
A simple search page consists of a few search options to work with while an advanced search page consists of several sections with search options.

Search and Results
Search & Results page type consists of 2 types -

Type 1 is very similar to an interactive page type and is usually launched from the search page on submitting search criteria. Hence it has a 'Back to Search' navigation option if a user wants to get back and change search criteria. (Eg: Company Contacts Search)

Type 2 allows for extensive search filtering for searches involving categories and tags. (Eg: Research)

NOTE: Search page types may include interactive and referential elements.

Company Name | Component Name
Heading
Submit   Cancel

— Header
— Search Options

Company Name | Component Name
< Back to Search
Heading

— Header
— Interactive Filters
— Global Actions
— Link Filters with Tabs
— Pagination
— Local Actions
— Search Results

Company Name | Component Name
Category and Tag Search
Heading

— Header
— Interactive Filters
— Global Actions
— Link Filters with Tabs
— Pagination
— Local Actions
— Search Results

Simple or Advanced Search

Search & Results Type 1

Search & Results Type 2

Text based detail Page Types

The Text based detail page types can be defined as a detail page that is linked from a main page containing a list view of data. Text based details do not have filters or interactions to work further within the view. They usually do not have other navigation options like tabs or secondary level links to explore this view further but have very minimal navigation like a "Back to.." option to get back to the main page.

Exception

Text based detail pages that are displayed within pop ups may have other navigation options like tabs or links to explore further. (Eg: An event clicked from the list view opens a pop up with tab options such as Details, Brief, Transcript, etc.) In this case the pop up will need to be closed if the user wants to get back to the main page.

Text based detail pages can be classified into 3 main types -

Type 1 - to display a news story or other textual data clicked from a headline or topic.

Type 2 - to display some basic summary data in a simple grid and some textual descriptions. (Eg: Company Contact Pages)

Type 3 - to display transcripts and event details.

NOTE: Text based page types may also include referential elements.

Company Name | Component Name

— Header
— Global Actions
— Back Navigation

< Back to ...

News Headline

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem.

— Textual Data

Type 1

Company Name | Component Name

— Header
— Global Actions
— Back Navigation
— Content Nav (for pop ups only)

< Back to ...

Basic Data Table

— First level Details

— Simple Data table

Text Description

— Textual Data

Type 3

Company Name | Component Name
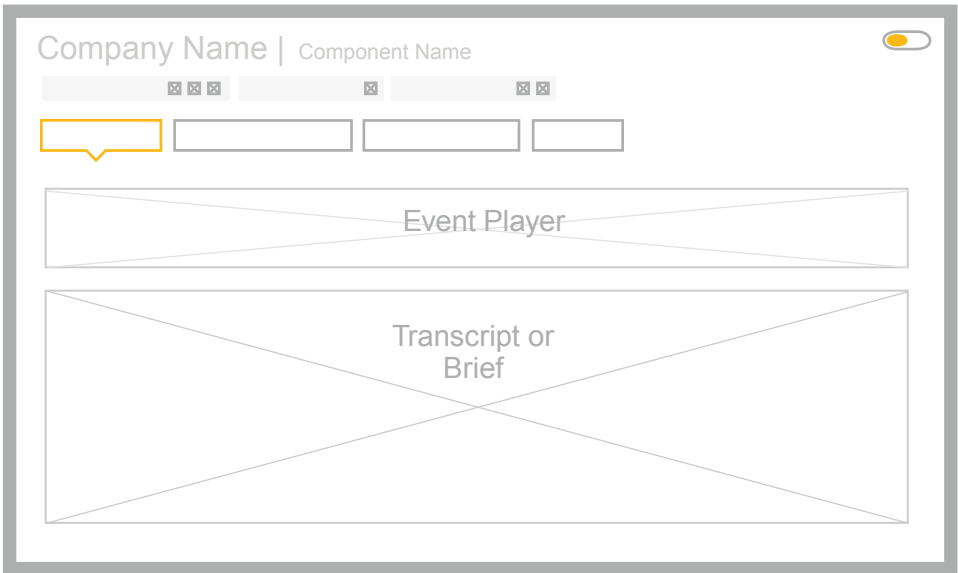
— Header
— Global Actions
— Content Nav (for pop ups only)

Event Player

— Event Player

Transcript or Brief

— Transcript or Brief

Type 3

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Tearsheet and Overview Page Type

Tearsheet and Overview pages refer to one-page summaries and overviews of public companies.

Tearsheet
A 'Tear sheet' is specifically a sheet report that provides up to date information about the status of various types of stocks. It provides a 'snapshot' of the business segments, recent operating results and key fundamental analysis metrics. Tearsheets usually don't have interactive elements or filters but just a view of static data that can be emailed or printed.

Overview
An 'Overview page' consists of modules of data about a company or a portfolio/ watchlist. These modules contain data such as financials, news, quotes, estimates mean, etc. The data from these modules can be used as a launch pad to view detailed content pages. (Eg: An estimates module in the overview page would launch more detailed company estimates)

Interactive Elements - Data modules in overview pages may have simple data filters and interactive charts.

Company Name | Component Name

Summary

Heading

Heading

Heading

Heading

Header

Global Actions

Summary & Charts
(can be interactive)

Data Filters

Overview Data
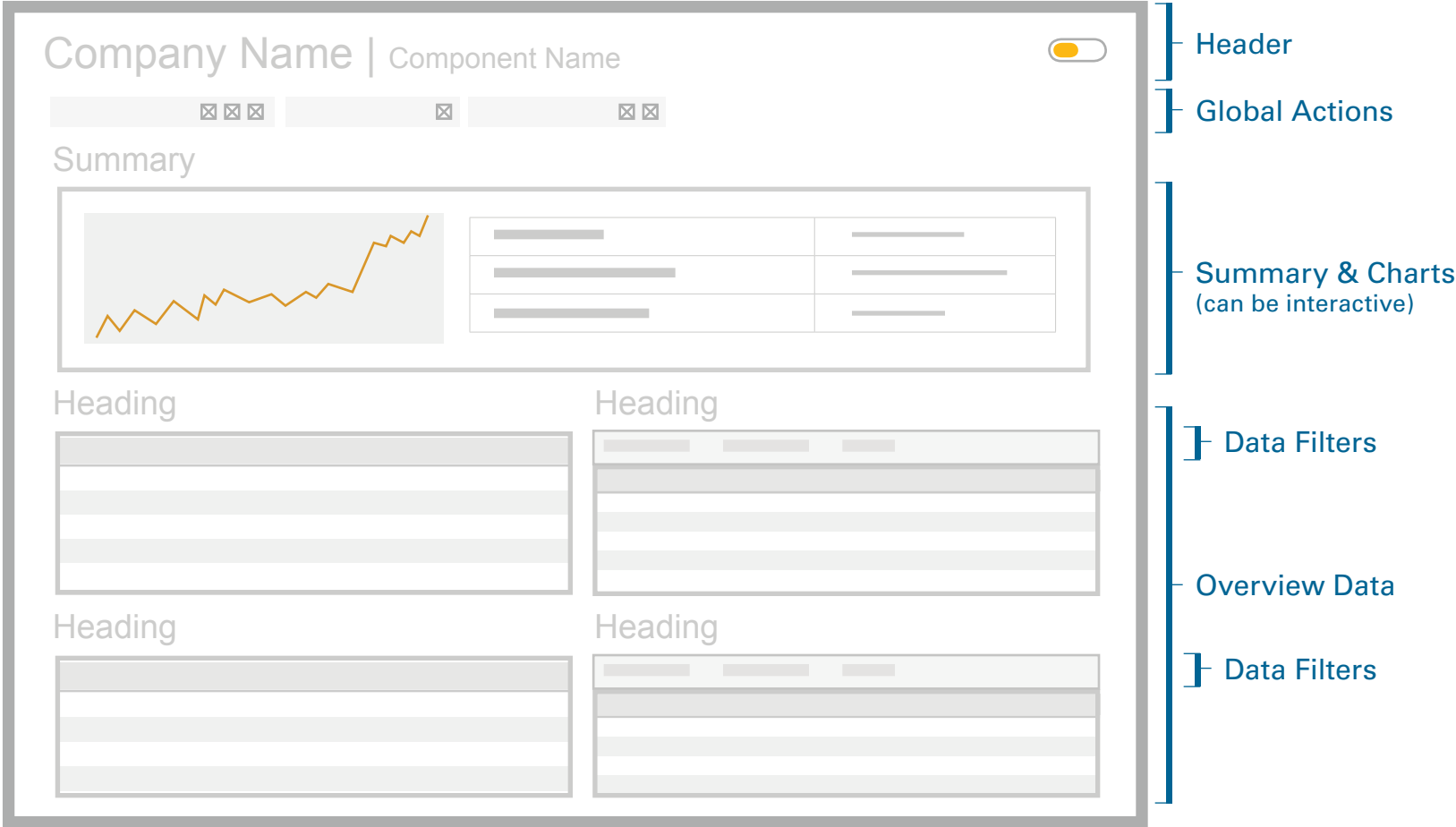
Data Filters

Company Name (Eg: Apple Inc.) | Content Name (Eg: All Measures)

On Off

CURRENTLY VIEWING: 2008 | Local Currency | Annual & Interim | Estimates Value - Citigroup | Primary Filters

⊞ **Secondary Filters (Eg: Type of Event)**

| Tab Name | Tab Name | Tab Name | Tab Name |

Second level | Second level links | Link Name | Link 4 | Link 5

Overview | Next Level links | Final level links | Link 4 | Link 5

Export or Download ☒ ☒ ☒   Any other global actions ☒

Summary

Col	Column	Col	Column Header

Free Float	878,292,166
Free Float % OS	99%
Shares Outstanding	885,876,000

Heading

Col	Column	Col	Column Header

Col	Column	Col	Column Header

Heading

< Back to ...

Datagrid Filters	Datagrid Filters	
Value ▼	Value ▼	(Go)

Local Actions or Batch Actions ☒ ☒ ☒

Items per view | 10 ▼ | << | **1-10** | 11-20 | 21-30 | 31-40 | 41-50 | 51-60 | >>

Column Group	Column Group		
Col	Column	Column Header	Column Header	Column Header

— Header

— Referential Filters

— Link Filters

— Global Actions

— Summary/ Overview

— Data Filters

— Data — Local Actions

— Pagination

— Datagrid

12

Company Name (Eg: Apple Inc.) | Component Name (Eg: Watchlist/ Portfolio Editor)   On Off

▼ CURRENTLY VIEWING: United States   Industry Aggregates   Search 🔍

Tab Name   Tab Name   Tab Name   Tab Name

Second level   Second level links   Link Name   Link 4   Link 5

Overview   Next Level links   Final level links   Link 4   Link 5

Export or Download ☒ ☒ ☒   Any other global actions ☒

Heading   < Back to ...

Datagrid Filters   Datagrid Filters
Value ▼   Value ▼ | Go

Local Actions or Batch Actions (Eg: Edit/ Delete) ☒ ☒ ☒

Items per view 10 ▼   << | **1-10** | 11-20 | 21-30 | 31-40 | 41-50 | 51-60 | >>

Column Group		Column Group		
Select	Column	Column Header	Column Header	Column Header
☑				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				
☐				

─ Header

─ Interactive Filters

─ Link Filters

─ Global Actions

─ Data Filters

─ Local Actions

─ Pagination

─ Data

─ Datagrid

Master Pages

Interactive Page Type

Component Redesign

13

Apple Inc. | Calendar

On Off

▼ CURRENTLY VIEWING: My Watchlist   All Markets   All Industries   Numeric and Non-Numeric

Referential Filters

⊞ Secondary Filters (Eg: Type of Event)

Export or Download ☒ ☒ ☒   Any other global actions ☒

Global Actions

| Daily | Weekly | Detail List View |

Today's Events | This week's Events | ☐ Include Weekends | 2008 ▼

Data Filters/ Calendar control

| Jan | Feb | Mar | Apr | May | Jun | Jul | AUG | Sep | Oct | Nov | Dec |

This week:

| 1 t | 2 w | 3 th | 4 f | 5 s | 6 s | 7 m | 8 t | 9 w | 10 th | 11 f | 12 | 13 s | 14 s | 15 m | 16 t | 17 w | 18 th | 19 f | 20 s | 21 s | 22 m | 23 t | 24 w | 25 th | 26 f | 27 s | 28 s | 29 m | 30 t | 31 w | th |

Monday, Aug 7	Tuesday, Aug 8	Wednesday, Aug 9	Thursday, Aug 10 TODAY	Friday, Aug 11

Datagrid

Master Pages

Calendar Page Type - Weekly View

Component Redesign

Apple Inc. | Calendar

On / Off

▼ **CURRENTLY VIEWING:**   My Watchlist   All Markets   All Industries   Numeric and Non-Numeric

⊞ Secondary Filters (Eg: Type of Event)

Export or Download ☒ ☒ ☒   Any other global actions ☒

| Daily | Weekly | Detail List View |

Today's Events   This Week's Events   ☐ Include Weekends   2008 ▼

Jan	Feb	Mar	Apr	May	Jun	Jul	AUG	Sep	Oct	Nov	Dec

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Today: 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| t | w | th | f | s | s | m | t | w | w | th | f | s | s | m | t | w | th | f | s | s | m | t | w | th | f | s | s | m | t | w | th |

am/ pm	Thursday, Aug 10
12am	
1am	
2am	
3am	
4am	
5am	
6am	
7am	
8am	

Header

Referential Filters

Global Actions

Data Filters/ Calendar control

Datagrid

Apple Inc. | Calendar

On | Off

▼ **CURRENTLY VIEWING:** My Watchlist | All Markets | All Industries | Numeric and Non-Numeric

Referential Filters

⊞ **Secondary Filters (Eg: Type of Event)**

Export or Download ⊠ ⊠ ⊠ | Any other global actions ⊠

Global Actions

| Daily | Weekly | Detail List View |

Data Filters/ Calendar control

Today's Events | This Week's Events | ☐ Include Weekends | 2008 ▼

Jan	Feb	Mar	Apr	May	Jun	Jul	AUG	Sep	Oct	Nov	Dec

Date	Add	Event Type	Ticker	Event Name
08/09/08 - 08/09/08				

Datagrid

Master Pages

Calendar Page Type -
Detail List View

Component Redesign

15

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Company Name (Eg: Apple Inc.) | Content Name (Eg: Company Search)

Heading

Label One

Value

○ I'm a label

Label One	Label One	Label Two
Value	Value ▾	Value ▾
Label One	Label One	Label Two
Value	Value ▾	Value ▾
Label One	Label One	Label Two
Value	Value ▾	Value ▾

● I'm a label

Select from Available List	Select All	Selected List	Remove All
Boston Targets		Boston Targets ⊗	
Inbound Calls		Inbound Calls ⊗	
SS Analysts		NY Meeting ⊗	
NY Meeting		SS Analysts ⊗	
Boston Targets		Inbound Calls 2 ⊗	
Inbound Calls			
SS Analysts			
NY Meeting			
Boston Targets			
Inbound Calls 2			
SS Analysts			

Submit   Cancel

Search - Simple or
Advanced

Component Redesign

Company Name (Eg: Apple Inc.) | Content Name (Eg: Company Search)

On Off

▼ CURRENTLY VIEWING:	2008	Local Currency	Annual & Interim	Estimates Value - Citigroup	Secondary Filters

⊞ **Secondary Filters**

Tab Name	Tab Name	Tab Name	Tab Name

Batch Actions ▼   Export   Print

Select	Headline	Date	Contributor	% Change	Blah
	Étoile Gestion				Blah
	thinkorswim Advisors, Inc.				Blah
	myCIO Wealth Partners, LLC				Blah
	eQ Rahastoyhtiö Oy				Blah
	aAd Capital Management, L.P.				Blah

Master Pages

Search and Results
Type 1

Component Redesign

Company Name (Eg: Apple Inc.) | Content Name (Eg: Company Search)

On Off

▼ CURRENTLY VIEWING: 2008 | Local Currency | Annual & Interim | Estimates Value - Citigroup | Secondary Filters

⊞ **Secondary Filters**

CURRENTLY APPLIED

Boston Targets ⊗
Inbound Calls ⊗
NY Meeting ⊗
SS Analysts ⊗
Inbound Calls 2 ⊗

Category 1

Boston Targets
Inbound Calls
SS Analysts
NY Meeting
Boston Targets

Category 2

Inbound Calls
SS Analysts
NY Meeting
Boston Targets
Inbound Calls 2

Category 2

SS Analysts
Boston Targets
SS Analysts
NY Meeting
Boston Targets

Tab Name | Tab Name | Tab Name | Tab Name

Batch Actions ▼   Export   Print

Select	Headline	Date	Contributor	% Change	Blah
	Étoile Gestion				Blah
	thinkorswim Advisors, Inc.				Blah
	myCIO Wealth Partners, LLC				Blah
	eQ Rahastoyhtiö Oy				Blah
	aAd Capital Management, L.P.				Blah

Company Name | Eg: All Shareholders

On Off

Étoile Gestion

< Back to Shareholder List

Portfolio Summary	
Equity Assets	5,979.07
Investment Style	Core Growth
Equity Assets	$20.0-49.9B
Investment Style	Active
Equity Assets	Investment Managers
Investment Style	Investment Advisor
Total Assets	Computer Hardware

Contact Information	
Address	170 Place Henri-Regnault
	La Défense
	Paris, 92043
	France
Tel	33-1-324-354
Fax	33-1-324-354
Firm URL	www.etoile-gestion.com

Key Contacts

Contact Name	Title	Phone	Email
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Bellman, Catherine	Portoflio Manager	33-1-324-354	bellmanc@etoile.com
Cassé, Olivier	Portoflio Manager	33-1-324-354	olivercasse@etoile.com

General Investment Approach

For active management, Étoile Gestion employs a dual approach to the investment process. The firm begins with a top-down approach, concentrating on sectoral research, as opposed to regional research. This is followed by a bottom-up approach to sector and stock selection, seeking out undervalued companies with potential in over-weighted sectors. For passive management, the firm uses varied indexing methodologies offering optimized portfolios and portfolios that reflect the benchmark closely. Étoile Gestion invests primarily, though not exclusively, in European and U.S. stocks. The typical average investment horizon time is five years. Decision Making Process:The firm makes use of in-house research generated by their analysts, and also relies on reports from external brokerage houses. The firm's overall investment strategy is determined by a monthly meeting of investment managers.

Company Name | Component Name (Eg: News)

On Off

Eg: News Headline

< Back to Headlines List

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur?

Header

Sub Header

News Story or Textual Data

Master Pages

Text based details
Type 2

Component Redesign

21

Company Name | Eg: Events

On | Off

Export or Download ⊠ ⊠ ⊠   Any other global actions ⊠

Tab Name | **Tab Name** | Tab Name | Tab Name

Event Name

Event Player

Heading

- Marge Wyrwas - Knight Capital Group - Senior Managing Dir., Communications, Marketing & IR
- Thomas Joyce - Knight Capital Group - Chairman, CEO
- Steven Bisgay - Knight Capital Group - CFO

Heading

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Heading

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam aliquam quaerat voluptatem. Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur? Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur.

Heading

Dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Header

Content Tabs
(for pop ups only)

Header

Textual Data

Master Pages

Text based details
Type 3

Component Redesign

Company Name (Eg: Apple Inc.) | Component Nane (Eg: Company Overview)

On Off

Export or Download ☒ ☒ ☒   Any other global actions ☒

Heading

Free Float	878,292,166
Free Float % OS	99%
Shares Outstanding	885,876,000

Heading

Col	Column	Col	Column Header

— Summary& Charts
(Can be interactive)

Heading   Link

Col	Column	Col	Column Header

Heading   Link

Col	Column	Col	Column Header

Heading   Link

Col	Column	Col	Column Header

Heading   Link

Datagrid Filters   Datagrid Filters

Value ▼   Value ▼ | Go

Col	Column	Col	Column Header

— Data Filters

Heading   Link

Col	Column	Col	Column Header

Heading   Link

Datagrid Filters   Datagrid Filters

Value ▼   Value ▼ | Go

Col	Column	Col	Column Header

— Data Filters

— Overview Data

Master Pages

Tearsheet and
Overview

Component Redesign

Apple Inc. | Ownership Summary

On Off

| Firms | Funds | Insider Summary | Insider Transactions | UK Raw Beneficial | UK Raw Nominee |

Export or Download ☒ ☒ ☒

Most Recent

Macro	Technology
Mid	High Tech Hardware
Micro	Computer Hardware

Free Float	878,292,166
Free Float % OS	99%
Shares Outstanding	885,876,000

Filing Status:	Current Period	1.02%
	06/30/08	71.11%
	03/31/08	9.61%

Investor Style

Col	Column	Col	Column Header

Investor Type

Datagrid Filters	Datagrid Filters	
Value ▼	Value ▼	Go

Col	Column	Col	Column Header

Heading

Column Group			Column Group		
Col	Column	Column Header	Column Header	Column Header	

Content Instances

Ownership (Referential)

Interactions:

- On/Off toggle
- Link Filters
- Data Filters

Component Redesign

Apple Inc. | All Shareholders

On Off

1923 Items | Items per view 50 ▼

<< | < | **1-50** | 51-100 | 101-150 | 151-200 | 201-250 | > | >>

Pagination

Local Actions or Batch Actions (Eg: Edit/ Delete) ☒ ☒ ☒   Advanced View Options ▦

Local Actions

# of Items	Investor Name	Current Position	% OS	Pos Change	% Change	Val ($MM)	Val Chg ($MM)	Style	* 5 more columns......
1	Étoile Gestion	0	0.00	-18,276	-100	0.00	0.00	Core Growth	Blah
2	thinkor~~~~n Advisors, Inc.	802	0.00	0	0.00	0.12	0.12	Hedge Fund	Blah
3	myCIO Wealth Partners, LLC	835	0.00	-234	-34.98	0.98	-0.98	Core Value	Blah
4	eQ Rahastoyhtiö Oy	8,356	0.00	9	0.09	0.09	0.09	GARP	Blah
5	aAd Capital Management, L.P.	64,998	0.01	-71,076	-72.76	1.76	-1.76	Hedge Fund	Blah

Datagrid

Content Instances
Ownership (Referential)

Interactions:
- On/Off toggle
- Pagination Slider
- Datagrid - Advanced View Options
- Datagrid - Column view editing and reordering
- Datagrid - Column Resizing

Component Redesign

Apple Inc. | All Shareholders

On Off

Étoile Gestion

< Back to Shareholder List

Portfolio Summary	
Equity Assets	5,979.07
Investment Style	Core Growth
Equity Assets	$20.0-49.9B
Investment Style	Active
Equity Assets	Investment Managers
Investment Style	Investment Advisor
Total Assets	Computer Hardware

Contact Information	
Address	170 Place Henri-Regnault
	La Défense
	Paris, 92043
	France
Tel	33-1-324-354
Fax	33-1-324-354
Firm URL	www.etoile-gestion.com

Key Contacts

Contact Name	Title	Phone	Email
Naudin, Jean-Charles	Head of Equity Investments	33-1-324-354	jeancharles@etoile.com
Bellman, Catherine	Portoflio Manager	33-1-324-354	bellmanc@etoile.com
Cassé, Olivier	Portoflio Manager	33-1-324-354	olivercasse@etoile.com

General Investment Approach

For active management, Étoile Gestion employs a dual approach to the investment process. The firm begins with a top-down approach, concentrating on sectoral research, as opposed to regional research. This is followed by a bottom-up approach to sector and stock selection, seeking out undervalued companies with potential in over-weighted sectors. For passive management, the firm uses varied indexing methodologies offering optimized portfolios and portfolios that reflect the benchmark closely. Étoile Gestion invests primarily, though not exclusively, in European and U.S. stocks. The typical average investment horizon time is five years. Decision Making Process:The firm makes use of in-house research generated by their analysts, and also relies on reports from external brokerage houses. The firm's overall investment strategy is determined by a monthly meeting of investment managers.

— Header

— Summary/ Overview

— Datagrid

— Data

— Textual Data

Content Instances

Ownership (Text based details)

Interactions:

- On/Off toggle

Component Redesign

Apple Inc. | Guidance - All Measures Summary

On/Off

| ▼ | CURRENTLY VIEWING: | 2008 | All Segments | GAAP | Numeric and Non-Numeric |

— Input/Select Filters

Download to Excel ☒ Print ☒

— Global Actions

Important Notices

Normal text. Adiamconulla facilit praesed magnibh ea faccum quis dignim do od et, consequam veliquatue cons non velisl inciliquisi.

Content Instances

Guidance (Referential)

Segment/ Category/ Measure	Units	Q1 Dec 07	Q2 Mar 08	Q3 June 08	Q4 Sep 08	FY Sep 08
Consolidated						
Income Statement						
Revenue	$mlns	9,200	Δ 29.0%	7,200.0	7,800.0	32,200.0
Cost of goods sold	$mlns	9,200	9,200	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T	T	T
iPod						
Income Statement						
Revenue	$mlns	9,200	29.0%	7,200.0	7,800.0	32,200.0
Cost of goods sold	$mlns	9,200	9,200	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T	T	T

— Data — Datagrid

Guidance Legend

| T Non-Numeric guidance | Δ Change from prior period | d Derived Value |

Interactions:

- On/Off toggle
- Input/Select Filters
- Datagrid - Cell Selection
- Datagrid - Row Header
- Datagrid - Link Detail
- Modal Overlay

Component Redesign

Apple Inc. | Guidance - All Measures Summary

On Off

▲ | CURRENTLY VIEWING: | 2008 | All Segments | GAAP | Numeric and Non-Numeric

Fiscal Year	Company Segment	Accounting	Guidance Type
2008 ▼	All Segments ▼	GAAP ▼	Numeric and Non-Numeric ▼

Submit   Cancel

Content Instances

Guidance (Referential)

Segment/ Category/ Measure	Units	Q1 Dec 07	Q2 Mar 08	Q3 June 08	Q4 Sep 08	FY Sep 08
Consolidated						
Income Statement						
Revenue	$mlns	9,200	Δ 29.0%	7,200.0	7,800.0	32,200.0
Cost of goods sold	$mlns	9,200	9,200	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T	T	T
iPod						
Income Statement						
Revenue	$mlns	9,200	29.0%	7,200.0	7,800.0	32,200.0
Cost of goods sold	$mlns	9,200	9,200	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T	T	T

Guidance Legend

T Non-Numeric guidance	△ Change from prior period	d Derived Value

Interactions:

- On/Off toggle
- Input/Select Filters
- Datagrid - Cell Selection
- Datagrid - Row Header
- Datagrid - Link Detail
- Modal Overlay

Component Redesign

Apple Inc. | Guidance - Revenue

On | Off

| ▼ | CURRENTLY VIEWING: | 2008 | Consolidated | Revenue | GAAP | Numeric and Non-Numeric |

— Input/Select Filters

Download to Excel ☒   Print ☒

— Global Actions

Important Notices

Normal text. Adiamconulla facilit praesed magnibh ea faccum quis dignim do od et, consequam veliquatue cons non velisl inciliquisi.

Guidance Revisions

< Back to All Measures

Revenue (GAAP) ($mlns)	Q1 Dec 07	Q2 Mar 08	Q3 June 08	Q4 Sep 08	FY Sep 08
# of Revisions	0	0	0	0	0
06/23/08	9,200	Δ 29.0%	7,200.0	7,800.0	32,200.0
06/23/08	9,200	9,200	9,200	9,200	9,200
06/23/08	T	T	T	T	T
06/23/08					
06/23/08					
06/23/08					
06/23/08					

Guidance Summary

Revenue (GAAP) ($mlns)	Q1 Dec 07	Q2 Mar 08	Q3 June 08	Q4 Sep 08	FY Sep 08
# of Revisions	0	0	0	0	0
2009	9,200	Δ 29.0%	7,200.0	7,800.0	32,200.0
2008	9,200	9,200	9,200	9,200	9,200
2007	T	T	T	T	T
2006					

— Data — Datagrid

Guidance Legend

T Non-Numeric guidance   Δ Change from prior period   d Derived Value

Content Instances

Guidance (Referential)

Interactions:

- On/Off toggle
- Primary Referential Filters
- Datagrid - Cell Selection
- Datagrid - Row Header
- Datagrid - Link Detail
- Modal Overlay

Component Redesign

Apple Inc. | Guidance - All Measures Summary

On Off

| ▼ | CURRENTLY VIEWING: | 2008 | All Segments | GAAP | Numeric and Non-Numeric |

Download to Excel ☒   Print ☒

Important Notices

Normal text. Adiamconulla facilit praesed magnibh ea faccum quis dignim do od et, consequam veliquatue cons non velisl inciliquisi.

Segment/ Category/ Measure	Units	Q1 Dec 07	Q2 Mar 08	Q3 June 08	Q4 Sep 08	FY Sep 08
Consolidated						
Income Statement						
Revenue	$mlns	9,200	Δ 29.0%	7,200.0	7,800.0	32,200.0
Cost of goods sold	$mlns	00	9,200	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T	T	T
iPod						
Income Statement						
Revenue	$mlns					32,200.0
Cost of goods sold	$mlns					9,200
Gross Profit	% of Sale					T

Excerpt Transcript   X

Income Taxes   Guidance: 9,200.0   Period: Q1-Dec.07

Oct 22, 2007 / 05:00PM ET
Q4 2007 Apple Inc. Earnings Conference Call

Peter Oppenheimer, Apple Inc. - CFO: " We expect OI&E to be about $195 million and we expect the tax rate to return to about 32%. "

Peter Oppenheimer, Apple Inc. - CFO: " Andy, to your tax rate question, the tax rate in the September quarter was about 27%, which was lower than our anticipated 32, primarily due to a benefit from prior-year audits that we had. "

Header

Input/Select Filters

Global Actions

Content Instances

Guidance (Referential)

Data

Interactions:

- On/Off toggle
- Primary Referential Filters
- Datagrid - Cell Selection
- Datagrid - Row Header
- Datagrid - Link Detail
- Modal Overlay
- Pop up

Component Redesign

Apple Inc. | Guidance - All Measures Summary

On Off

▼ CURRENTLY VIEWING: 2008 | All Segments | GAAP | Numeric and Non-Numeric

Download to Excel ☒ Print ☒

Important Notices

Normal text. Adiamconulla facilit praesed magnibh ea faccum quis dignim do od et, consequam veliquatue cons non velisl inciliquisi.

Content Instances

Guidance (Referential)

Segment/ Category/ Measure	Units	Q1 Dec 07	Q2 Mar 08	Q3 June 08	Q4 Sep 08	FY Sep 08
Consolidated						
Income Statement						
Revenue	$mlns	9,200	Δ 29.0%	7,200.0	7,800.0	32,200.0
Cost of goods sold	$mlns	9,200	9,200	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T	T	T
iPod						
Income Statement						
Revenue	$mlns					32,200.0
Cost of goods sold	$mlns					9,200
Gross Profit	% of Sales					T

Data

Excerpt Transcript   X

Income Taxes	Guidance: 9,200.0	Period: Q1-Dec.07

Oct 22, 2007 / 05:00PM ET
Q4 2007 Apple Inc. Earnings Conference Call

Peter Oppenheimer, Apple Inc. - CFO: " We expect OI&E to be about $195 million and we expect the tax rate to return to about 32%. "

Peter Oppenheimer, Apple Inc. - CFO: " Andy, to your tax rate question, the tax rate in the September quarter was about 27%, which was lower than our anticipated 32, primarily due to a benefit from prior-year audits that we had. "

Pop up   X

Interactions:

• On/Off toggle
• Primary Referential Filters
• Datagrid - Cell Selection
• Datagrid - Row Header
• Datagrid - Link Detail
• Modal Overlay
• Pop up

Component Redesign

NASDAQ 100 | Holdings Detail

On Off

—| Header

Export ☒ Print ☒ Save ☒   (Help)

—| Global Actions

Holdings Dates

—| Data Filters

| 2008 ▼ |

—| Calendar Control

Jan	Feb	Mar	Apr	May	Jun	Jul	**AUG**	Sep	Oct	Nov	Dec

| 1 t | 2 w | 3 t | 4 f | 5 s | 6 s | 7 m | 8 t | 9 w | 10 th | 11 f | 12 s | 13 s | 14 m | **15 t** | 16 w | 17 th | 18 f | 19 s | 20 s | 21 m | 22 t | 23 w | 24 th | 25 f | 26 s | 27 s | 28 m | 29 t | 30 w | 31 th |

Holdings Summary - 08/15/08

—| Summary Data

Total Cash	5,979.07
Total Market Value	5,119,307,979,071
Number of Securities	134
Base Currency	U.S Dollar

Holdings Detail

—| Pagination

Items per view [10 ▼]   << | **1-10** | 11-20 | 21-30 | 31-40 | 41-50 | 51-60 | >>

—| Datagrid

Name	ID ▲	Shares	Local Currency	Local Price	Local Market Value	Price	Market Value
APPLIED MATLS INC	AMAT-O	1,316,709,000.00	USD	16.54	21,778,366,860	16.54	21,778,366,860
ALTERA CORP	ALTR-O	792,028,000.00	USD	20.57	16,292,015,960	20.57	16,292,015,960
AKAMAI TECHNOLOGIES IN	AKAM-O	302,810,000.00	USD	17.72	5,365,793,200	17.72	5,365,793,200
AUTODESK INC	ADSK-O	438,315,000.00	USD	33.54	14,701,085,100	33.54	14,701,085,100
ADOBE SYS INC	ADBE-O	979,041,000.00	USD	38.14	37,340,623,740	38.14	37,340,623,740
AMGEN INC	AMGN-O	953,167,000.00	USD	65.89	62,804,173,630	65.89	62,804,173,630
AMAZON COM INC	AMZN-O	520,928,000.00	USD	78.73	41,012,661,440	78.73	41,012,661,440
APOLLO GROUP INC	APOL-O	301,017,000.00	USD	67.37	20,279,515,290	67.37	20,279,515,290
ACTIVISION BLIZZARD IN	ATVI-O	2,198,172,000.00	USD	16.57	36,423,710,040	16.57	36,423,710,040
BED BATH & BEYOND INC	BBBY-O	655,756,000.00	USD	31.85	20,885,828,600	31.85	20,885,828,600
BAIDU COM INC	BIDU-O	49,434,000.00	USD	266.49	13,173,666,660	266.49	13,173,666,660

Interactions:

- On/Off toggle
- Pagination
- Data Filters
- Calendar Control

Microsoft Corporation | Events List

On Off

▼ CURRENTLY VIEWING: Week of 09/09/08 | RSVP Required

⊞ **Type of Event**

Input/Select Filters

Upcoming Events

Type	Event Name	Date	Action
☒	Q1 2009 Microsoft Earnings Release	10/23/2008	🔊
☒	Q1 2009 Microsoft Earnings Conference Call	10/23/2008	🔊
☒	Q3 2008 Fast Search & Transfer Inc. Earnings Release	10/23/2008	🔊
☒	Q1 2009 Microsoft Earnings Release	10/23/2008	🔊
☒	Q4 2009 Microsoft Earnings Release	10/23/2008	🔊

Datagrid

Past Events

Items per view 10 ▼ | << | **1-10** | 11-20 | 21-30 | 31-40 | 41-50 | 51-60 | >>

Pagination

Type	Event Name	Date	Action
☒	Q2 2008 Fast Search & Transfer Inc. Earnings Release	10/23/2008	🔊 📝 📄
☒	Microsoft Conference Call with Corporate Vice President Ted Kummert to make a Significant Announcement Related to Microsoft's Data and Storage Platform Division	10/23/2008	🔊 📝 📄
☒	Q4 2007 Fast Search & Transfer Inc. Earnings Release	10/23/2008	🔊 📝 📄
☒	Microsoft Proposes Acquisition of Yahoo! Conference Call	10/23/2008	🔊 📝 📄
☒	Microsoft Annual Meeting of Shareholders	10/23/2008	🔊 📝 📄

Pop up X

Data

Datagrid

Content Instances

Events List View
(Referential)

Interactions:

- On/Off toggle
- Primary Referential Filters
- Secondary Referential Filters
- Pagination

Component Redesign

Pop up   X

X
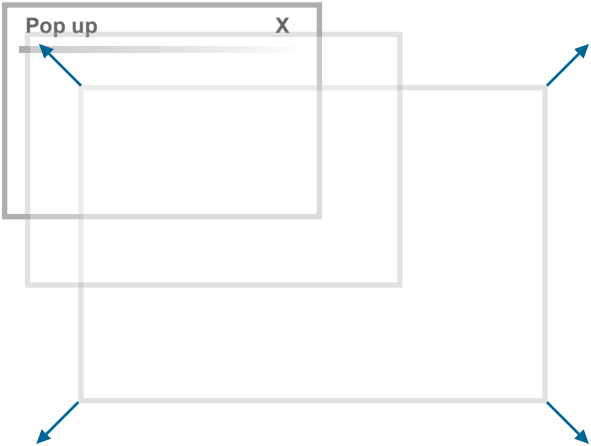
Company Name | Event Detail

Export or Download ☒ ☒ ☒   Add to Calendar ☒

| Event Details | Brief | Transcript | Guidance | News Release |

Microsoft Conference Call with Corporate Vice President Ted Kummert to make a Significant Announcement Related to Microsoft's Data Storage

Conference Event	Conference Call with Corporate Vice President
Last update	Sep 05, 2008 / 05:03AM ET
Transcript status	Available
Event Notes	
	Chris Liddell, chief financial officer, Microsoft

Live	
Webcast Status	This webcast is no longer available
Replay	
Online Replay Status	Listen now to the online replay
Online Replay Ends	Sep 05, 2008 / 05:03AM ET

Sponsor Information

Colleen Healy General Manager, IR Ph 425 706 3703 chealy@microsoft.com	Microsoft 1 Microsoft Way Redmond WA 98052-6399 United States Corporate Website

Header

Global Actions

Content Nav (for pop ups only)

Summary/ Overview

Datagrid

Data

Textual Data

Content Instances

Events Detail (Text based details)
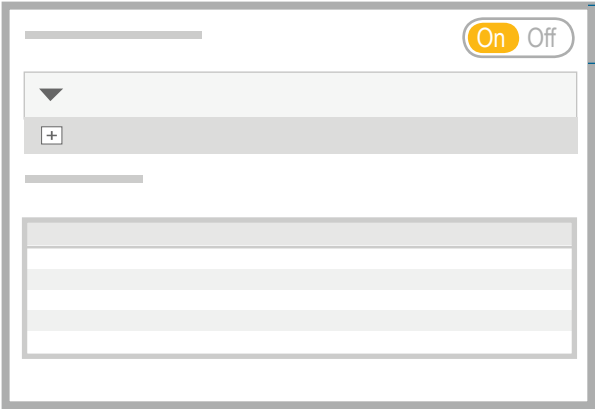
Component Redesign

Header

34

Event Listener - On/Off Toggle

On Off

On Mouseover

On Off

*On MouseClick
Slider moves*

On **Off**

End State

On **Off**

On **Off**

On Mouseover

On **Off**

*On MouseClick
Slider moves*

On Off

End State

On Off

Primary
Referential
Filters

Input/ Select Filters

| ▼ | CURRENTLY VIEWING: | Local Currency | Annual & Interim | Estimates Value - Citigroup | 09/23/08 to 09/23/09 |

⊞ **Secondary Filters (Eg: Type of Event)**

Mouse Over

| ▼ | CURRENTLY VIEWING: | Local Currency | Annual & Interim | Estimates Value - Citigroup | 09/23/08 to 09/23/09 |

⊞ **Secondary Filters (Eg: Type of Event)**

Mouse Click - Animates and opens out filter area
Estimates Value - Citigroup

Cancel
Cancel or click (second time)- Animates and closes out filter area. Text returns to previous state
OR
Estimates Value - Citigroup

On clicking a value, the associated control is highlighted

| ▲ | CURRENTLY VIEWING: | Local Currency | Annual & Interim | Estimates Value - Citigroup | 09/23/08 to 09/23/09 |

Currency
Local Currency ▼

Periodicity
Annual & Interim ▼

◉ Estimates Value
Citigroup ▼

◯ Mean
Value ▼

Date Range
08/15/07 [📅] ●——————●—— [📅] 08/15/08

Submit   Cancel

Mouse click on arrow also opens out filter area

When arrow is clicked, no highlight on values or associated controls

⊞ **Secondary Filters (Eg: Type of Event)**

Submit
Mouse Click - Animates and closes out filter area.
Updates "Current View"
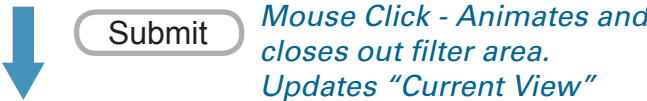
| ▼ | CURRENTLY VIEWING: | Local Currency | Annual & Interim | Mean Value | 09/23/08 to 09/23/09 |

⊞ **Secondary Filters (Eg: Type of Event)**

Primary
Referential
Filters

▼ CURRENTLY VIEWING:

Date Time Range Filter

▲ CURRENTLY VIEWING: | All Research | 09/05/08 11:00AM to 10/05/08 5:00PM

View   Publish Date & Time Range

All Research ▼   Specific Range ▼   09/05/08 📅 ──◯────◯── 📅 10/05/08

                                       11:00AM   5:00PM

Submit   Cancel

⊞ Secondary Filters (Eg: Type of Event)

Dropdown with
predefined ranges

Specific Range ▼
Specific Range
Today
Last 1 Hour
Last 2 Hours
Last 6 Hours
Last 12 Hours
Last 18 Hours
Last 1 Day
Last 1 Week
Last 15 Days
Last 1 Month
Last 45 Days
Last 3 Months
Last 6 Months
Last 1 Year

📅 08/15/08

Fades in as a flyout on
mouse click

📅 08/15/08

< January 2008 >

S	M	T	W	T	F	S
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Default state of slider for any
given value range

08/15/07 📅 ──◯──────◯── 📅 08/15/08

Dynamically chang-
es values as slider
moves

08/15/07 📅 ──◯────◯──── 📅 02/15/08

Combo text box;
mouse click inside box
opens menu

11:00AM
10:00AM
10:30AM
11:00AM
11:30AM
12:00PM
12:30PM

Input/Select Filters

▲ | CURRENTLY VIEWING: | My Watchlist | All Markets | Chemicals | US Mid West | 09/11/2008

Watchlist
[My Watchlist ▼]

Industry
[All Markets ▼]

Industry
[Chemicals ▼]

Region
[US Midwest ▼]

Date
[09/05/08] 📅

[Submit] [Cancel]

⊞ **Secondary Filters (Eg: Type of Event)**

Mouse Over

▼ | CURRENTLY VIEWING: | My Watchlist | All Markets | Chemicals | US Mid West | 09/11/2008

⊞ **Secondary Filters (Eg: Type of Event)**

Mouse Click - Animates and opens out filter area

g: Type of Event)

[Cancel] *Cancel or click (second time)- Animates and closes out filter area. Text returns to previous state*

▼ | CURRENTLY VIEWING: | My Watchlist | All Markets | Chemicals | US Mid West | 09/11/2008

⊟ **Secondary Filters (Eg: Type of Event)**

Select All | Clear All

Earnings
Select List | Clear List
☑ Earnings Releases
☑ Earnings Calls/Presentations
☑ Guidance Calls/Presentations

Corporate
Select List | Clear List
☐ Shareholder/Annual Meetings
☐ Stock Splits
☐ Sales/Trading Stmt Releases

Institutional
Select List | Clear List
☑ Company Visits
☐ Annual calls
☐ Roadshows

Syndicate
Select List | Clear List
☐ IPO Filings
☑ IPO Pricings
☐ IPO Withdrawals

[Submit] [Cancel]

[Submit] *Mouse Click - Animates and closes out filter area. Updates the data with changes.*
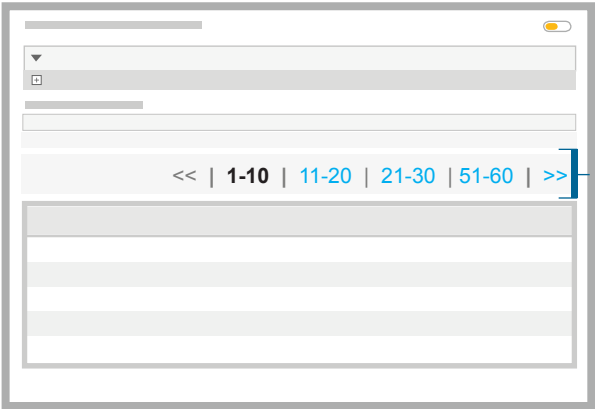
▼ | CURRENTLY VIEWING: | My Watchlist | All Markets | Chemicals | US Mid West | 09/11/2008

⊞ **Secondary Filters (Eg: Type of Event)**

⊞ Eg: Type of Event

Secondary Referential Filters

Interaction Types

Secondary Referential Filters

Pagination

Less than 100 search results

60 Items | Items per view [10 ▼]   View All   << | < | **1-10** | 11-20 | 21-30 | 31-40 | 41-50 | 51-60 | > | >>

10
20
40
60

More than 100 search results

Default State

1923 Items | Items per view [50 ▼]   << | < | **1-50** | 51-100 | 101-150 | 151-200 | 201-250 | > | >>

50
100
150
200

Moving the Slider

View range changes when slider moves

<< | < | 151-200 | 201-250 | 251-300 | 301-350 | 351- | > | >>

On Mouse Release

Clicking on a link directly will automatically move the slider.

60 | 351-400 | **401-450** | 451- | > | >>

Displays view where slider points after mouse is released.

<< | < | 251-300 | 301-350 | **351-400** | 401-450 | 451- | > | >>

Pagination

Batch Actions Thin

| ▼ | CURRENTLY VIEWING: | Item 1 | Item 2 | Item 3 | Item 4 |

Local Batch Actions

| Batch Actions ▾ | | | Export | Print |

☐	Column Header	Column Header	Column Header	Column Header
☑				
☒				
☐				

Selecting a batch action

| ▼ | CURRENTLY VIEWING: | Item 1 | Item 2 | Item 3 | Item 4 |

| Batch Actions ▾ | | | Export | Print |

Save				
Print	der	Column Header	Column Header	Column Header
Email				
Delete				
☐				

Mouse release opens modal window

Print ___ X

Name	Date/Time	Pages	File Size	Printer	Status
					Stopped
					Cancelled
					[progress bar]
					Completed
					[progress bar]
					[progress bar]

5 Files   Total: 437k | 40% Complete   [progress bar]

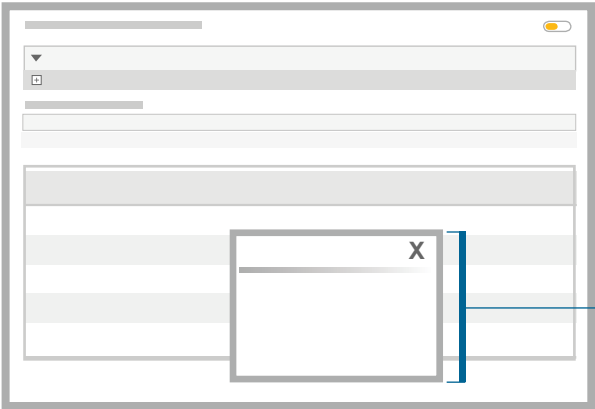(Delete)   (Hold)   (Resume)   (Pause)   (Print)

When to use modal overlays

Modal overlays are used to present details or related information to the content being viewed. Modal overlays should be used in place of pop ups wherever possible. Pop ups should only be used   when the screen links to content not directly related to the content currently viewed.

Modal Overlay

Modal overlays can be moved/ dragged aroud

Excerpt Transcript   X

Income Taxes	Guidance: 9,200.0	Period: Q1-Dec.07

Oct 22, 2007 / 05:00PM ET
Q4 2007 Apple Inc. Earnings Conference Call

Peter Oppenheimer, Apple Inc. - CFO: " We expect OI&E to be about $195 million and we expect the tax rate to return to about 32%. "

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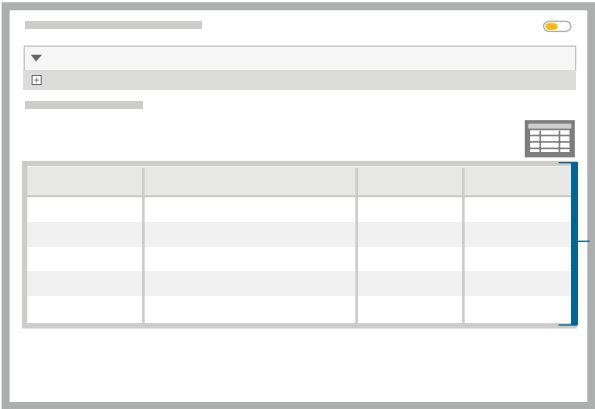
X
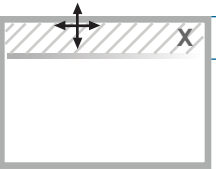
Mouse drag sensitive area

Datagrid

Create And Edit Column Views via Advanced View Options

Advanced View Options

All Research

☐	Type	Ticker	Date	Headline	Contributor	Pgs	Tags	RMS
☐								
☐								
☐								
☐								
☐								
☐								

Mouse click opens modal window

View Options   X

View Name   Custom View 2

Click on row opens view
options on the left panel

Column Order

| Type |
| Ticker |
| Headline |
| Headline |
| Contributor |
| Pgs |
| Tags |

Custom Views

Name	☐
Custom View 1	☐
Custom View 2	☐
Custom View 3	☐
Custom View 4	☐
Custom View 5	☐

"Drag&Drop" changes column order; multiselect is available

+ Add New   × Delete

+ Add New   × Delete

Click on "Add New" clears
form on the left panel

Cancel   Save

*Mouse click on "Add New" replaces View Options
window with Add Columns window*

Component Redesign

+ Add New

Add Columns   X

Keyword Filter   Lorem Ipsum

Category   Column Name

All Categories   Field Description 1
Category1   Field Description 2
Category2   Field Description 3
Category3   Field Description 4
Category4   Field Description 5
Category5   Field Description 6
Category6   Field Description 7
Category7   Field Description 8
Category8   Field Description 9

Multiselect available

Cancel   Add

Mouse click on "Add" replaces Add Columns
window with View Options window

Add

View Options   X

View Name   Custom View 2

Column Order

Field Description 3
Field Description 5
Field Description 6
Ticker
Date
Headline
Contributor
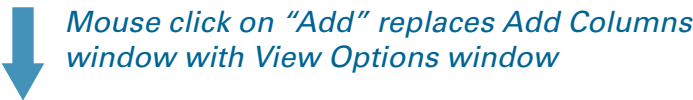
New columns are displayed on
top of the list and can be
reordered.

Custom Views

Name

Custom View 1
Custom View 2
Custom View 3
Custom View 4
Custom View 5

+ Add New   × Delete   + Add New   × Delete

Cancel   Save

Mouse click on "Save" closes window and
displays updated grid

Save
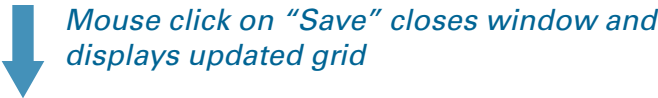
Grid reflects new collumns arrangement

All Research

☐	Field Description 3	Field Description 5	Field Description 6	Ticker	Date	Headline	Contributor	Pgs	Tags	RMS
☐										
☐										
☐										
☐										
☐										
☐										

Datagrid - Edit View (Advanced Options)

Datagrid

Edit Column Views via direct manipulation (Reordering columns using drag n' drop)

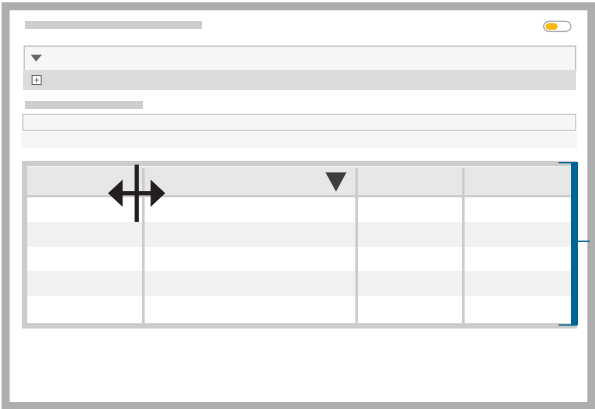Datagrid - Edit View
(Direct Manipulation)

☐	Type ▾	Ticker ▾	Date ▾	Headline ▾	Contributor ▾	Pgs ▾	Tags ▾	RMS ▾
☐								
☐								
☐								
☐								
☐								
☐								

Ticker

Ticker ▾

Column snaps in place at new position on mouse release

☐	Type ▾	Date ▾	Ticker ▾	Headline ▾	Contributor ▾	Pgs ▾	Tags ▾	RMS ▾
☐								
☐								
☐								
☐								
☐								
☐								

Component Redesign

Datagrid

Edit Column Views by Sorting

Date	Headline

Click on header sorts the column in ascending order

Date	Headline ▼
	Altria Bid for UST:US Tobacco
	Coca-Cola Co.: Quick Comment
	Google:Google/NBC Deal
	Telecom, Media & Tech
	WB:New CFO Has Work

Second click sorts column in descending order

Date	Headline ▲
	WB:New CFO Has Work
	Telecom, Media & Tech
	Google:Google/NBC Deal
	Coca-Cola Co.: Quick Comment
	Altria Bid for UST:US Tobacco

Edit Column Views by Resizing

Date	Headline

hover over header separator changes cursor icon to resize icon

Cursor drags separator to new position

Date	Headline

Mouse release places separator at new position

Date	Headline
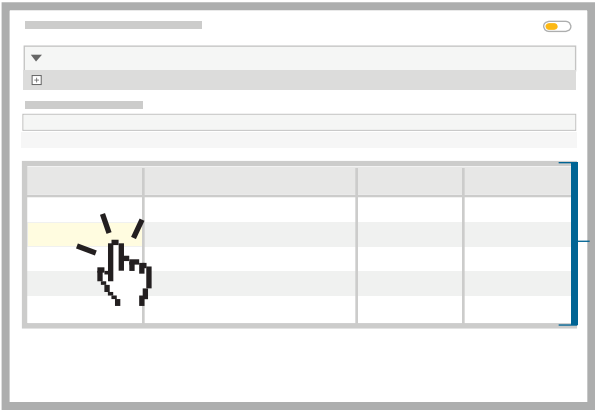
Datagrid

Segment/ Category/ Measure	Units	Q1 Dec 07	Q2 Mar 08	FY Sep 08
Consolidated				
Income Statement				
Revenue	$mlns	9,200	Δ 29.0%	32,200.0
Cost of goods sold	$mlns	00	9,200	9,200
Gross Profit	% of Sales	T	T	T

*Click mouse
and release*

Segment/ Category/ Measure	Units	Q1 Dec 07	Q2 Mar 08	FY Sep 08
Consolidated				
Income Statement				
Revenue	$mlns	9,200	Δ 29.0%	32,200.0
Cost of goods sold	$mlns	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T

Datagrid - Cell
Selection
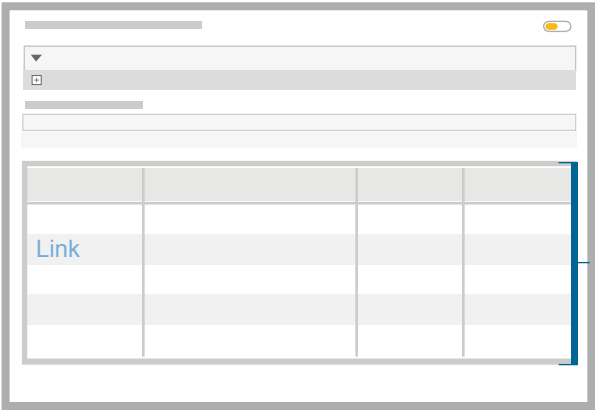
Datagrid

Segment/ Category/ Measure	Units	Q1 Dec 07	Q2 Mar 08	FY Sep 08
Income Statement				
Revenue	$mlns	9,200	Δ 29.0%	32,200.0
Cost of goods sold	$mlns	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T

Mouseover

Segment/ Category/ Measure	Units	Q1 Dec 07	Q2 Mar 08	FY Sep 08
Income Statement				
Revenue	$mlns	9,200	Δ 29.0%	32,200.0
Cost of goods sold	$mlns	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T
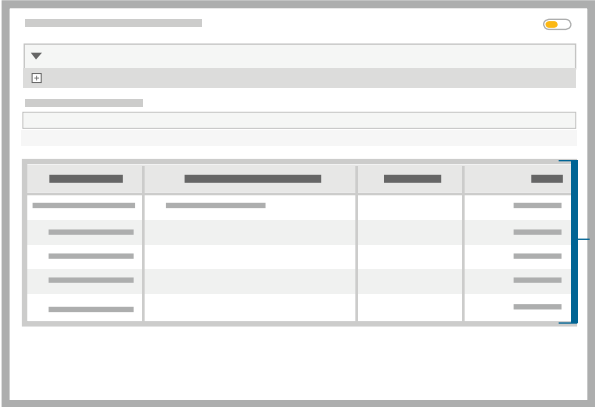
Datagrid

Idented data

Center Align column headers
(including group headers and
row headers)

Segment/ Category/ Measure	Units	Q1 Dec 07	Q2 Mar 08	FY Sep 08
Consolidated				
Income Statement				
Revenue	$mlns	9,200	Δ 29.0%	32,200.0
Cost of goods sold	$mlns	9,200	9,200	9,200
Gross Profit	% of Sales	T	T	T

Alphabetical data is
left aligned

Numeric Data is right aligned

Type	Event Name	Date	Action
⊠	Q1 2009 Microsoft Earnings Release	10/23/2008	🔊
⊠	Q1 2009 Microsoft Earnings Conference Call	10/23/2008	🔊
⊠	Q3 2008 Fast Search & Transfer Inc. Earnings Release	10/23/2008	🔊
⊠	Q1 2009 Microsoft Earnings Release	10/23/2008	🔊
⊠	Q4 2009 Microsoft Earnings Release	10/23/2008	🔊

Calendar
Control

Apple Inc. | Calendar

▼ CURRENTLY VIEWING: My Watchlist   All Markets   All Industries   Numeric and Non-Numeric

⊞ Secondary Filters (Eg: Type of Event)

Export or Download ⊠ ⊠ ⊠   Any other global actions ⊠

    Daily | Weekly |

Today's Events   This week's Events   ☐ Include Weekends   2008 ▾

Jan	Feb	Mar	Apr	May	AUG	

| | This week: | | | | | | | | | | | | | | | | |
|1 t|2 w|3 th|4 f|5 s|6 s|7 m|8 t|9 w|10 th|11 f| > |12 s|13 s|14 m|15 t|16 w|17 th|18 f|19 s|20 m|21 t|22 w|23 th|24 s|

Week slider...

turns to day slider

Monday, Aug 7	Tuesday, Aug 8	Wednesday, Aug 9	Thursday, Aug 10

From week view

To day/hour view

Apple Inc. | Calendar

▼ CURRENTLY VIEWING: My Watchlist   All Markets   All Industries   Numeric and Non-Numeric

⊞ Secondary Filters (Eg: Type of Event)

Export or Download ⊠ ⊠ ⊠   Any other global actions ⊠

    Daily | Weekly |

Today's Events   This Week's Events   ☐ Include Weekends   2008 ▾

Jan	Feb	Mar	Apr	May	AUG	

|1 t|2 w|3 th|4 f|5 s|6 s|7 m|8 t|Today: 9 w|10 th|11 f|12 s|13 s|14 m|15 t|16 w|17 th|18 f|19 s|20 m|21 t|22 w|

	Thursday, Aug 10
12am	
1am	
2am	
3am	
4am	
5am	
6am	
7am	
8am	

Default State

Current year

Today's Events | This week's Events | ☐ Include Weekends | 2008 ▼

Jan		Feb		Mar		Apr		May		Jun		Jul		AUG

This week:

| 1 t | 2 w | 3 th | 4 f | 5 s | 6 s | 7 m | 8 t | 9 w | 10 th | 11 f | 12 s | 13 s | 14 m | 15 t | 16 w | 17 th | 18 f | 19 s | 20 s | 21 m | 22 |

Monday, Aug 7   Tuesday, Aug 8   Wednesday, Aug 9   Thu
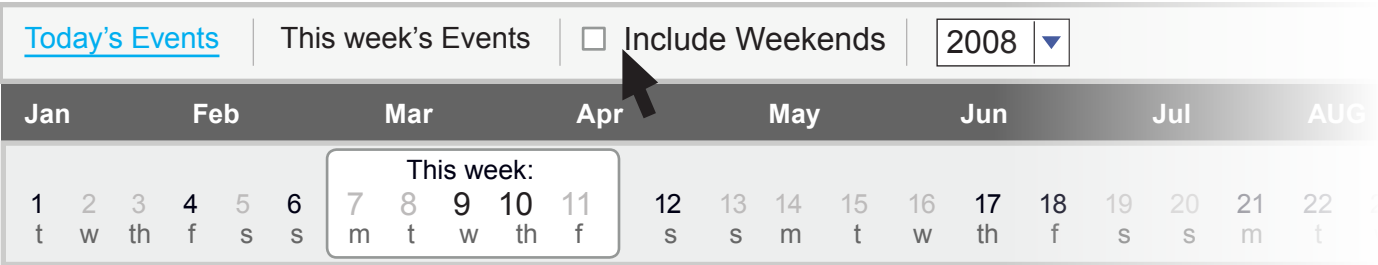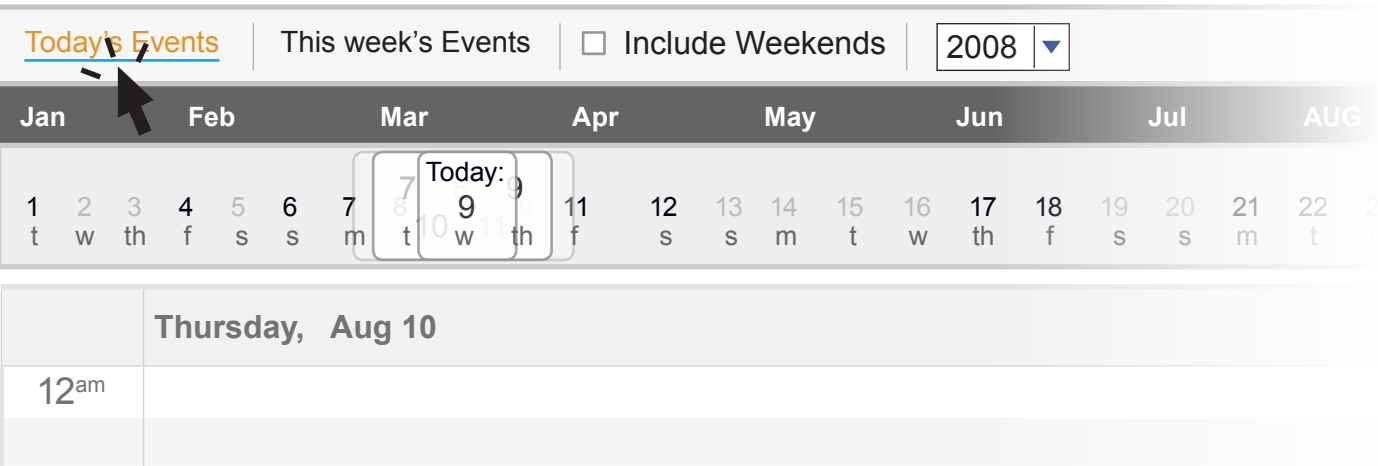
Click
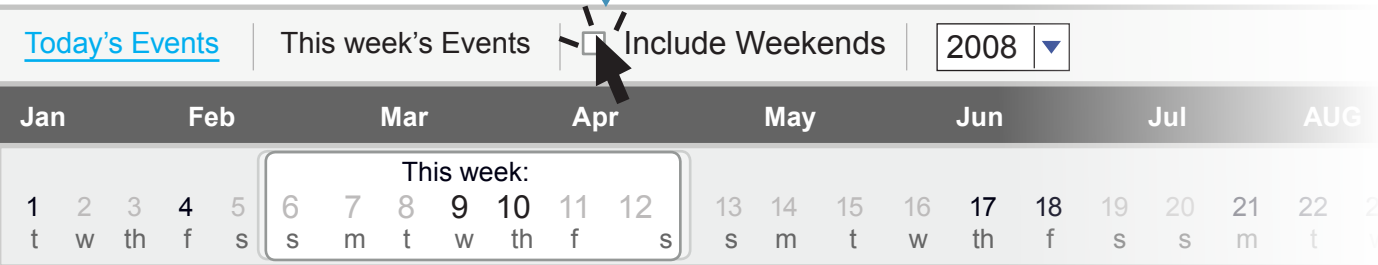
If nessecary, month selector slides to current month

Day Selector Shrinks to current day

Weekly calendar view changes to day/hour format

Today's Events | This week's Events | ☐ Include Weekends | 2008 ▼

Jan	Feb	Mar	Apr	May	Jun	Jul	AUG

Today: 9 w

| 1 t | 2 w | 3 th | 4 f | 5 s | 6 s | 7 m | 11 f | 12 s | 13 s | 14 m | 15 t | 16 w | 17 th | 18 f | 19 s | 20 s | 21 m | 22 t |

Thursday, Aug 10
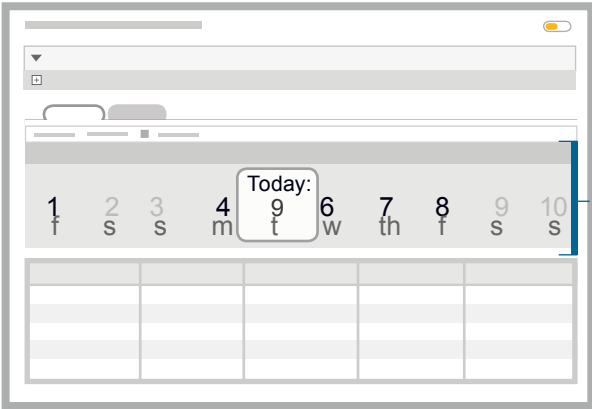
12am

This Week's Events

Clicking *This Week's Events* will drag the year, month and week slider(s) to the current business week and month.

Today's Events

Clicking *Today's Events* will bring the drag the year, month and week slider(s) to the current business day. It will change the Calendar view to the day/hour view.

Include Weekends

Clicking the include weekend checkbox will add the Sunday PRIOR to the current workweek and add the Saturday AFTER the current business week. The Calendar layout will reflect it in the week view.

Today's Events | This week's Events | ☐ Include Weekends | 2008 ▼

Jan	Feb	Mar	Apr	May	Jun	Jul	AUG

This week:

| 1 t | 2 w | 3 th | 4 f | 5 s | 6 s | 7 m | 8 t | 9 w | 10 th | 11 f | 12 s | 13 s | 14 m | 15 t | 16 w | 17 th | 18 f | 19 s | 20 s | 21 m | 22 t |

Click

Today's Events | This week's Events | ☐ Include Weekends | 2008 ▼

Jan	Feb	Mar	Apr	May	Jun	Jul	AUG

This week:

| 1 t | 2 w | 3 th | 4 f | 5 s | 6 s | 7 m | 8 t | 9 w | 10 th | 11 f | 12 s | 13 s | 14 m | 15 t | 16 w | 17 th | 18 f | 19 s | 20 s | 21 m | 22 t |

Calendar Control
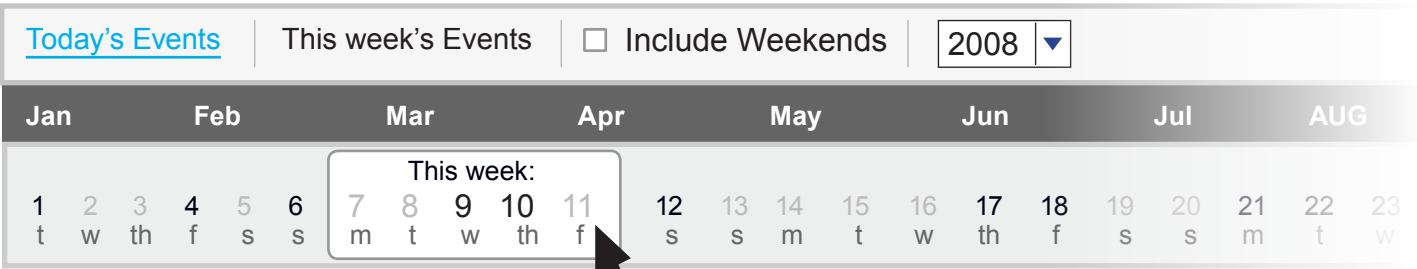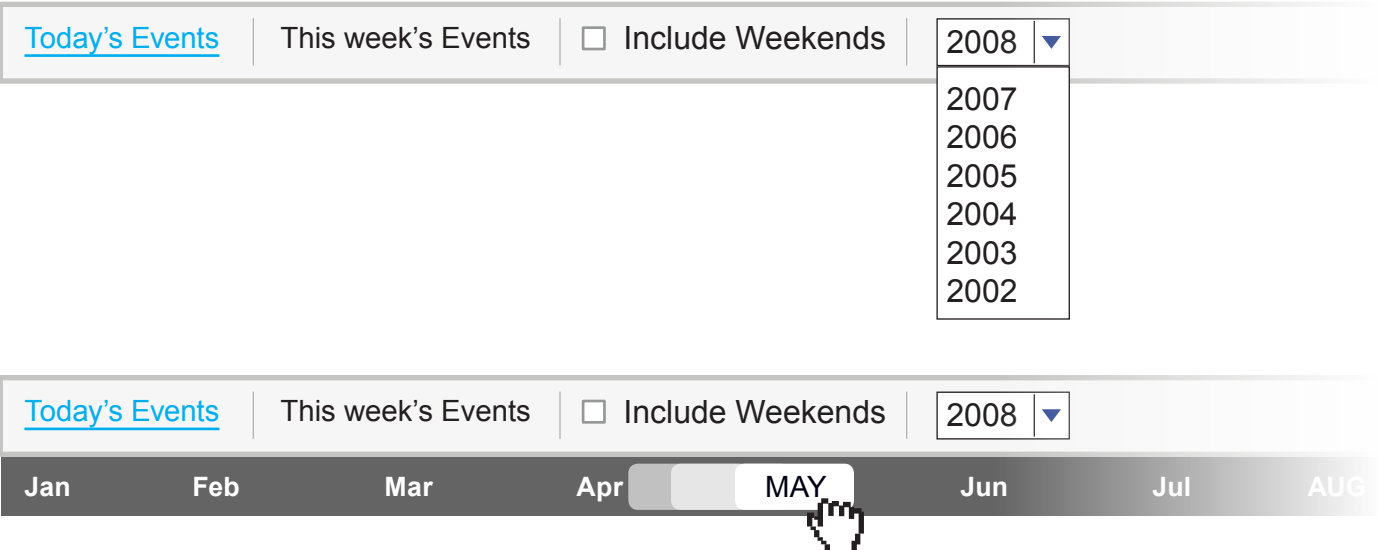
Today: 9 t

| 1 t | 2 s | 3 s | 4 m | 9 t | 6 | 7 th | 8 | 9 | 10 s |

Year

Select the year from the dropdown

Month

You can Click, Hold and Drag a month slider. By default, the current month is selected, the week view will default to week one, the day view will default to day one of the month.

Week

You can Click, Hold and Drag a day slider. No matter what day you stop on, the week slider will default to stop on Monday of that week, unless *Include Weekends* has been selected, in which case the week starts in Sunday.

Day

You can Click, Hold and Drag a day slider. You can select any day.

Calendar Control

Today:
9 t

1 t 2 s 3 s 4 m 6 7 th 8 f 9 s 10 s

Today's Events | This week's Events | ☐ Include Weekends | 2008 ▼

2007
2006
2005
2004
2003
2002

Today's Events | This week's Events | ☐ Include Weekends | 2008 ▼

Jan | Feb | Mar | Apr | MAY | Jun | Jul | AUG

Today's Events | This week's Events | ☐ Include Weekends | 2008 ▼

Jan | Feb | Mar | Apr | May | Jun | Jul | AUG

This week:

1 t 2 w 3 th 4 f 5 s 6 s 7 m 8 t 9 w 10 th 11 f 12 s 13 s 14 m 15 t 16 w 17 th 18 f 19 s 20 s 21 m 22 t 23 w

Click, Hold and Drag

Today's Events | This week's Events | ☐ Include Weekends | 2008 ▼

Jan | Feb | Mar | Apr | May | Jun | Jul | AUG

This week:

1 t 2 w 3 th 4 f 5 s 6 s 7 m 8 t 9 w 10 th 11 f 12 s 7 s 3 s 7 14 m 15 t 16 w 17 th 18 3 19 s 20 s 21 m 22 t 23 w