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| Print Specification  Letter enclosing brochures for HLC/MCC clients – UDBRCHE/ UDBRCHF |

All instructions for the use of this template are shown in this font.

**Showing and Hiding Instructions**

* To hide instructions, click the “ ¶” (show/hide) button,
* To display the instructions, click the “¶” (show/hide) button again.

Consider each section of the document, but only complete the sections that are applicable to your project. However, if a section is not applicable, please state so explicitly rather than deleting the section.

Business Area: MLIDT

Application Name: Excalibur - DDGS

Date of Issue: Nov 1, 2022

Document Version: 3.0.3

Draft

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# Introduction

This document provides the verbiage and instructions for generating the cover letter used while sending the brochures to HLC and MCC client.

<Create a brief introduction with enough information to give context to this document – this should be an introduction to the print item and does not need to reference the project it may be developed within>

## Document Purpose

<Define the purpose of the Report Requirements Document, including objectives and boundaries.>

The purpose of this document is to:

* Define the business purpose of the print item by means of describing the type of information that needs to be presented in the print item and why it required, from the business perspective.
* Specify the elements that will be required within the print item including any applicable logic that will drive when to include/exclude certain elements.
* Define any specific requirements regarding layout and format (how the information should be presented).

This document does not include:

* Any requirements for other application functionalities that are not related to the specific print item described.
* Details around data elements that are already described in the Data Elements Catalogue.
* Description of Business Rules that are already specified in the Business Rules Catalogue.
* Any project-specific information associated to implementation of the print generating system.
* Any information associated to this or any other system design.

This is a reusable document, which is to be updated in the event of changes to the print item the print process. Any details related to other application functionalities must be documented in corresponding reusable documents such as Use Cases, User Interface Documents, Business Rules Catalogue etc. Any details related to project / initiative must be documented in the Solution Requirements document.

## Business Context

As per the CIBC process, it is utmost important to update its new mortgagor’s about CIBC’s dedications in providing high standard of client service and protecting all of the information provided by the customer. CIBC provides these information by mailing them two brochures, entitled *Our Service Commitment* and *Your Privacy is Protected* along with the covering letter.

<Briefly describe how the print item will be used in the context of the business process(es) it will be used in>

## Compliance with CIBC Technology Standards and Architecture

The reporting solution shall comply with CIBC Technology Standards and Architecture. Otherwise, technology and business stakeholders must resolve discrepancies.

Refer to [the technology standards site](http://w3.cms.cibc.com/NR/exeres/96ce396a-3b95-4836-b103-40ba26dfdd82.htm) for the most recent updates and more details on CIBC Technology Standards and Architecture.

## Referenced Documentation

The Print Specification should be read in conjunction with the Data Elements Catalogue, Style Guides (where available), Solution Requirement Document and other supporting documents, as listed below.

<Document the referenced Data Elements Catalogue and other documents that are required to understand/complete this document.>

|  |  |
| --- | --- |
| Document Reference <Reference the name of associated documents, such as Data Element Catalogue.> | **Description/Comments**  <Speak to why you are referencing the document unless it is self-apparent in the Document Reference (or title of the document)> |
| Data Elements Catalogue | This document is being referenced because the data elements listed in this document can be found in the Data Elements Catalogue. The Data Elements Catalogue will contain all the additional information regarding the attributes for each data elements. |
| <http://w2.cibc.com/en/cibc/help/brand/Documents/Brand-Standards-Statements.pdf> | CIBC Brand Standards |
| <http://w2.cibc.com/en/cibc/help/Documents/cibc-editorial-standards.doc> | CIBC Editorial Standards |

# Specification

The print specification is documented from an “information necessary to the business” perspective. The details on procedures that are used to generate and present information within the system are the subject of the application design documentation.

## Print Item Attributes

This section describes the general attributes of the Print Item.

| **Attribute** | **Description** |
| --- | --- |
| **Languages Required** | English and French<Specify which language(s) the print item will need to be presented in> |
| **Trigger** | Scheduled Batch Job *<Specify what action should cause the Print Item to be printed>* |
| **Copies**   * **# of Copies** * **Recipients** | One copy is sent to the Primary/First Borrower listed on the Mortgage.*<Specify how many copies of the document are to be produced, and who each copy is for. (e.g. customer, branch, audit)>* |
| **Page Size** | Letter *<Specify the paper size of the Print Item>* |
| **Production Rules**  **Specify the rules for when and how the document is produced** | * The document must be generated in the language of the Primary Borrower.   + If <DE00682 – Language Preference> is equal to English(E), the letter must be generated in English   + If <DE00682 – Language Preference> is equal to French(F), the letter must be generated in French * The date populated on the document is the current date as per DDGS system date. * Document must be imaged. * Letter enclosing brochures for HLC/MCC clients must follow the Manual Folding process*<Specify known rules about when this Print Item will be generated – what are the general business scenarios>* |
| **Frequency** | Daily *<Specify how often the Print Item is expected to be printed – consider schedule or on-demand (batch or online) characteristics as well as any other relevant information about frequency (specific time of day, specific day of week, etc.)>* |
| **Method of Production** | Hard copy produced and sent to Primary/First Borrower and co-borrower who has opted to receive this letter  Pdf produced for imaging purposes *<Specify formats the Print Item should be generated for (e.g. hard copy, imaged, website, email, etc.)>* |
| **Re-print** | Yes, Re-print option for batch-generated letter must be available to user having appropriate access rights *<Specify whether or not the document may be reprinted, and if so, who can reprint and how access may need to be controlled – include if a reprinted copy must be an exact duplicate or a re-generation of the document based on data at the time of re-print>* |
| **Anticipated Volume** | N/A *<**Provide an estimation of the volume of documents to be produced in a given batch run, or, if it’s an on-demand print, then expected average volume per some defined period of time (“100 per week”, “90,000 per month”, etc.)>* |
| **Information Security Requirements Provide any other Specific Information Classification Requirements as per Security Standards that are applicable to this particular document printout and are not included in Detailed Non-Functional Requirements overall** | Information classification according to SC-181 – Information Classification and Protection: Confidential – High  *<Specify the CIBC Security Classification of the Print Item>* |

Use the Print Item Components and Definitions to define the elements within the Print Item. Logic within the components should describe how and when the elements are structured/ordered. If there are some versions of the Print Item that are significantly different, copy and paste a new “Print Item Components and Definitions” section for each version. This technique can also be used if English and French versions are to be defined.

## Print Item Components and Definitions

Print Item Specifications described below should incorporate how information must be visually presented online or in hard copy and, wherever possible, should be based on visual style standards described in the corresponding Style Guide if the one exists.

In the absence of specific standards, the guiding principles applicable to all CIBC applications should be followed. For their description refer to:

CIBC Brand Style Elements: <http://w2.cibc.com/en/cibc/help/brand/Pages/default.aspx>

### \*\*PS40244 – Contact Information for Inquiries Regarding Correspondence\*\* The system shall include a section within the letter that provides clear instructions for recipients on how to address any questions or concerns related to the content of the letter. This section will state: "Should you have questions about this letter, please contact [insert contact information]." The contact information must be prominently displayed to ensure easy visibility and accessibility for the recipients.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Document Version: V3.0.0** | | | | |
| **A. Print Attributes** | | | | |
| **Attribute** | | **Description** | | |
| **Business Name** | | Letter enclosing brochures for HLC/MCC clients*<Specify how the business name for this Print Item>* | | |
| **Technical Name** | | UDBRCH *<Specify the system name for this Print Item (if available)>* | | |
| **Language** Specify language(s) for this version of the document [English/French/Other] If a second or third language version of the document is needed, include it within a separate subsection of this specification | | English *<Define the Language for this version of the Print Item>* | | |
| **Page Layout/ Margins** | | The page layout, margins, rules, text format criteria (font type, style, size, color etc.) will reference the Style Guide provided by Bank standards. *<Specify information about margins or layout (portrait, landscape, etc.) that need to be considered>* | | |
| ### Requirement Section  \*\*Other\*\*  The system shall provide an "Other" feature that allows users to input additional information not covered by predefined categories. This feature will enable users to express unique needs or preferences, ensuring a comprehensive understanding of their requirements. The "Other" input field must be easily accessible and clearly labeled within the user interface.   Users shall be able to enter text up to a specified character limit, ensuring that the input remains concise and relevant. The system shall validate the input to prevent the submission of inappropriate content. Additionally, the "Other" feature must be designed to seamlessly integrate with existing functionalities, ensuring a cohesive user experience.  The implementation of this feature shall include appropriate error handling and user feedback mechanisms to guide users in providing the necessary information. The system shall also log all entries made in the "Other" field for future reference and analysis.   This requirement aims to enhance user engagement and satisfaction by accommodating diverse user inputs and preferences. | | * In this Print Specification Document, bolded texts and values in the Print rule column must appear bold in the Document. * For all dates, the leading zero(s) for the “day” must be suppressed if applicable. * For application number and amount data fields the leading zero(s) must be suppressed, if applicable. * There should not be any space before “:” * All the amount fields should be displayed with 2 decimal places e.g. 15000.36 i.e. Value from backend/100 * All the rate fields should be displayed with 3 decimal places e.g. 5.366% * Leave 1 blank line space after each paragraph unless specified * All dates should be formatted Month DD, YYYY unless otherwise specified.*<List any other requirements about the Print Item not covered above>* | | |
| **B. Document Description**  Document each field/value is separate lines | | | | |
| **Identifier/Section** | **Print Body Text** | | **Print Rule** | **Other Information e.g., Business Rule, UC reference, or data element names as per Data Elements Catalogue** |
| Header Block:  CIBC Logo *<Use some means of identifying the block, section or print element of the Print Item being defined – use a separate row for each item (e.g. Header, Customer Name, Address Block, etc.)>* | Print New CIBC logo -  *<Supply the body text (complete with placeholders for the dynamic text or data elements that will be inserted) here. Use one row per body text element, as appropriate (word, phrase, sentence, paragraph, etc.). Avoid placing more than one paragraph in a single row.>* | | <Provide any logic associated with the text element that is to be printed, including rules governing when the element should be included or how it should be structured with respect to other elements. If there are multiple dynamic text elements and or Data Elements per body text section, list each as a separate row attached to the same body text specification (to the left).> | * Refer PS41120 for the New CIBC Logo details   *<Include any other relevant information regarding the section.>* |
| Regional Addresses | <Dynamic 1> | | <Dynamic 1>  IF [<DE04282 – Property Province> is not equal to “Quebec(QC)”]  CIBC Mortgage Servicing Centre PO Box 115 Commerce Court Postal Stn  Toronto ON M5L 1E5  ELSE  CIBC Mortgages Inc. PO Box 6003 Centre-Ville Stn  Montréal QC H3C 3B2  ### Requirement Section  #### Feature: User Profile Management  \*\*Overview:\*\* The User Profile Management feature allows users to create, edit, and manage their personal profiles within the application. This functionality is essential for enhancing user experience by providing personalized settings and information.  \*\*Requirements:\*\*  1. \*\*User Registration:\*\*  - The system shall allow new users to register by providing their name, email address, and password.  - The system shall validate the email address format and ensure that the password meets security criteria (minimum 8 characters, including at least one uppercase letter, one lowercase letter, one number, and one special character).  2. \*\*Profile Creation:\*\*  - Upon successful registration, the system shall prompt users to complete their profile by adding additional information such as profile picture, bio, and contact details.  - The system shall allow users to skip this step and complete their profile later.  3. \*\*Profile Editing:\*\*  - The system shall provide users with the ability to edit their profile information at any time.  - Users shall be able to update their name, email address, password, profile picture, bio, and contact details.  - The system shall require users to confirm their password when changing their email address or password.  4. \*\*Profile Privacy Settings:\*\*  - The system shall allow users to set their profile visibility to public, private, or friends-only.  - Users shall be able to manage who can view their profile information and posts.  5. \*\*Profile Deletion:\*\*  - The system shall provide users with the option to delete their profile permanently.  - Upon deletion, all user data shall be removed from the system, and the user shall receive a confirmation message.  6. \*\*User Notifications:\*\*  - The system shall notify users of any changes made to their profile via email.  - Users shall have the option to opt-in or opt-out of receiving these notifications.  \*\*Acceptance Criteria:\*\* - Users must be able to register, edit, and delete their profiles without encountering errors. - All user inputs must be validated, and appropriate error messages must be displayed for invalid inputs. - The system must ensure that user data is securely stored and complies with data protection regulations.  \*\*Dependencies:\*\* - This feature requires integration with the authentication module for user registration and login functionalities. - The profile picture upload functionality must be supported by the media management system.  \*\*Conclusion:\*\* The User Profile Management feature is a critical component of the application, aimed at providing users with a seamless and personalized experience. It is essential that all requirements are met to ensure user satisfaction and data security. | * Regional Address appears at the top right corner. * One space between City and Province, 2 spaces between Province and Postal Code. |
| Form ID | UDBRCH - 2013/05 | |  | * Appears on the bottom left corner of every page * Form ID should be horizontally aligned with the pre-defined position of Footer -Page number ( even if page number is not printed) * It should be vertically aligned to the left margin of the letter body |
| Document Sequence Number | <Document sequence Number> | |  | * Placed below the logo. * Appears just above the Mailing Address, it will always be 2.5 inches from the left margin. * Sequence number will be displayed in envelope window. |
| Borrower’s Name | <DE00532 – Customer Name1> <Dynamic 1> | | <Dynamic 1>  If [<Customer Name 2> is available]:  <DE00533 - Customer Name2>  End | * Left aligned * \*\*Greeting Message Format\*\*  The greeting message shall display as "Hello <First Name>," where <First Name> is the user's first name presented in proper case, followed by a comma. |
| Borrower Mailing Address | <DE02091 - Mailing Address Line 1>  <Dynamic 1> <Dynamic 2> <Dynamic 3> <Dynamic 4> | | <Dynamic 1>  If [<DE02092 - Mailing Address Line 2> is available]  <DE02093 - Attention Line for Mailing Address>  \*\*Feature Description:\*\*  The system shall provide an "Attention" line for mailing addresses, allowing users to specify a recipient's name. This line will be prominently displayed above the primary address fields.  \*\*Requirement Details:\*\*  1. The "Attention" line shall be labeled as "ATTN:" to clearly indicate its purpose. 2. The input field for the "Attention" line shall accept alphanumeric characters and have a maximum character limit of 50. 3. The "Attention" line shall be optional; users may choose to leave it blank if not needed. 4. If filled, the "Attention" line shall be displayed in a bold font to enhance visibility on printed materials. 5. The system shall ensure that the "Attention" line is included in all mailing address outputs, including digital and printed formats.  End | * Left aligned, under Borrower Name * Mailing address must be in upper case * Leave no Blank line in between the mailing address * Leave minimum 2 blank line space after mailing address |
| <Dynamic 2>  If <DE02093 - Mailing Address Line 3> is available]  <DE02093 - Mailing Address Line 3>  End |
| <Dynamic 3>  If <DE02094 - Mailing Address Line 4> is available]  <DE02094 - Mailing Address Line 4>  End |
| <Dynamic 4>  If <DE02095 - Postal Code> is available]  <DE02095 - Postal Code>  End |
| Date | <Current Date> | |  | * Left aligned * <Date> is system-generated and represents the date the letter was processed. * Current Date should not display in envelope window. * Leave one blank line space after date |
| \*\*Requirements Section\*\*  \*\*Feature Title: Enhanced User Dashboard\*\*  \*\*Overview:\*\* The Enhanced User Dashboard is designed to provide users with a comprehensive and intuitive interface that consolidates key information and functionalities in one accessible location. This feature aims to improve user engagement and streamline navigation, ultimately enhancing the overall user experience.  \*\*Requirements:\*\*  1. \*\*User Interface Design:\*\*  - The dashboard must present a clean and modern layout that aligns with the overall aesthetic of the application.  - All elements should be responsive, ensuring optimal display on various devices, including desktops, tablets, and smartphones.  2. \*\*Data Display:\*\*  - The dashboard must aggregate and display real-time data relevant to the user’s activities and preferences.  - Users should have the ability to customize the displayed data widgets according to their needs, including options to add, remove, or rearrange widgets.  3. \*\*Navigation:\*\*  - The dashboard must include a clear and intuitive navigation menu that allows users to access different sections of the application seamlessly.  - Quick access buttons for frequently used features should be prominently displayed on the dashboard.  4. \*\*Notifications:\*\*  - The dashboard must incorporate a notification center that alerts users to important updates, messages, or actions required.  - Users should be able to manage notification settings to control the types of alerts they receive.  5. \*\*Performance:\*\*  - The dashboard must load within 2 seconds under standard network conditions to ensure a smooth user experience.  - The system should handle up to 1,000 concurrent users without performance degradation.  6. \*\*Accessibility:\*\*  - The dashboard must comply with WCAG 2.1 Level AA accessibility standards to ensure usability for all users, including those with disabilities.  - Keyboard navigation and screen reader compatibility must be fully supported.  7. \*\*Security:\*\*  - User data displayed on the dashboard must be protected in accordance with industry-standard security protocols.  - The system must implement user authentication and authorization measures to ensure that sensitive information is only accessible to authorized users.  \*\*Conclusion:\*\* The Enhanced User Dashboard is a critical feature that will significantly improve user interaction with the application. By adhering to the outlined requirements, we will ensure that the dashboard meets user expectations and contributes to a positive overall experience. | Dear CIBC Mortgage Customer: | | Certainly! To assist you effectively, I need the specific details from both the old PS section and the new mockup feature description. Please provide that information so I can create a suitable requirement section for your software Project Specification document. | * Left aligned, below Title * Leave 1 blank line spaces after Salutations |
| Subject Line/Mortgage Number | Re: Mortgage Loan Number <Dynamic 1>: <DE00529 – Mortgage Number>.<DE00530 - Charge Type> | | <Dynamic 1>  If [<DE04813 - HPP Indicator> is equal to “Yes”]  under your CIBC Home Power Plan®  END | * Left align * Mortgage Number would be upto 9 digits. * Charge Type must have 1 digit. |
| Property Address | Property Address: <DE02114 - Property Address line 1> <Dynamic 1> | | <Dynamic 1>  If [<DE02115 - Property Address line 2> is available]:  <DE02115 - Property Address>  The system shall provide a field for the user to input the property address. This field must accommodate multiple lines to ensure that users can enter detailed address information, including but not limited to street address, apartment or unit number, city, state, and postal code. The address input must validate the format to ensure accuracy and completeness before submission.  End | * Property Address will be displayed in single line * Property address must be in upper case * Leave one blank line space after Property Address |
| **Letter Body** – It is split into paragraphs as shown below: | | | | |
| Paragraph 1 – Opening Note | \*\*Requirement Section: Customer Appreciation Message\*\*  We are grateful for the opportunity to serve you, and we are committed to demonstrating our dedication every day. Thank you for choosing CIBC for your mortgage needs. We deeply value your business and the trust you place in us. | |  | * Left Align after paragraph 1 * Leave 1 blank line spaces after Paragraph 1 |
| Paragraph 2 | At CIBC, we recognize the importance of transparency and trust in managing your mortgage loan. To ensure you are well-informed, we provide essential information regarding our Service Commitment and the measures we take to protect your privacy. This information pertains specifically to your CIBC mortgage, identified by mortgage number <mortgage #>, for the property located at <property address>.   For your convenience, we have included two informative brochures: Our Service Commitment and Your Privacy is Protected. These documents detail our dedication to delivering exceptional client service and safeguarding your personal information. We invite you to review these materials to better understand our commitments to you. | |  | * Left Align * Leave one blank line space after paragraph 2 |
| Paragraph 3 | ### Requirement Section: Customer Support Feature  We understand that you may have questions or require assistance. Our dedicated support team is here to provide you with the help you need. For any inquiries or support requests, please do not hesitate to reach out to us. You can easily connect with our customer service representatives through our online chat feature or by calling our support hotline at 1 800 123-4567. Your satisfaction is our priority, and we are committed to ensuring you have a seamless experience with our services. | |  | * Leave 1 blank line spaces after Paragraph 3 * Left Align |
| Paragraph 4 | Thank you once again for choosing CIBC. We look forward to continuing to serve your banking needs. | |  | * Leave 1 blank line spaces after Paragraph 4 * Left Align |
| **End of Letter Body** | | | | |
| Closing Remarks | Yours sincerely,    CIBC Representative | |  | * Left Align * Leave one blank line space after the third line (Bank name) |
| ### Requirement Section  \*\*Feature Title: User Profile Management\*\*  \*\*Overview:\*\* The User Profile Management feature allows users to create, edit, and manage their personal profiles within the application. This functionality is essential for enhancing user engagement and providing a personalized experience.  \*\*Requirements:\*\*  1. \*\*Profile Creation:\*\*  - Users must be able to create a new profile by providing essential information, including but not limited to:  - Full Name  - Email Address  - Password  - Profile Picture (optional)  - The system should validate the email address format and ensure that the password meets security criteria (minimum 8 characters, including at least one uppercase letter, one lowercase letter, one number, and one special character).  2. \*\*Profile Editing:\*\*  - Users must have the ability to edit their profile information at any time.  - The system should allow users to update the following fields:  - Full Name  - Email Address  - Password  - Profile Picture  - Changes made to the profile must be saved upon user confirmation, and a success message should be displayed.  3. \*\*Profile Deletion:\*\*  - Users must be able to delete their profiles permanently.  - The system should prompt users with a confirmation dialog to prevent accidental deletions.  - Upon successful deletion, the user should receive a notification confirming that their profile has been removed.  4. \*\*Profile Viewing:\*\*  - Users must be able to view their profile information at any time.  - The profile view should display all relevant information, including:  - Full Name  - Email Address  - Profile Picture  - Users should have the option to navigate back to the profile editing page from the profile view.  5. \*\*Security and Privacy:\*\*  - User data must be stored securely, adhering to industry standards for data protection.  - Users should have the option to make their profiles private, limiting visibility to only approved connections.  \*\*Acceptance Criteria:\*\* - The feature must be tested for usability and functionality across all supported devices and browsers. - All user inputs must be validated, and appropriate error messages should be displayed for invalid entries. - User actions (creation, editing, deletion) must be logged for audit purposes.  This requirement section outlines the necessary functionalities for the User Profile Management feature, ensuring a comprehensive and user-friendly experience within the application. | P.S.Remember, it’s easy for you to keep track of your CIBC mortgage loan. Simply visit **www.cibc.com** to sign onto CIBC Online Banking and viewing your mortgage loan details anytime. | |  | * Left align * The text marked bold must be printed as bold |
| Disclaimer | <Dynamic 1> | | <Dynamic 1>  IF [<DE04282 – Property Province> is equal to “Quebec(QC)”]  Note: The terms mortgage and mortgage loan also include the concept of hypothec and hypothecary loan as used in the Province of Quebec.  END | * Left Align   **Font Size:** 8 pt |
| ### Trademarks  The system shall provide a dedicated section for the management and display of trademarks. This feature will ensure that all registered trademarks are accurately represented and easily accessible within the application. The trademarks section will include the following functionalities:  1. \*\*Display of Registered Trademarks\*\*: The application shall display a comprehensive list of all registered trademarks associated with the organization. Each trademark entry will include the trademark name, registration number, and relevant dates.  2. \*\*Trademark Search Functionality\*\*: Users shall be able to search for specific trademarks using various filters, including name, registration status, and date range. The search results will be displayed in a user-friendly format.  3. \*\*Trademark Details\*\*: Upon selecting a trademark from the list, users shall be able to view detailed information, including the trademark's description, associated products or services, and legal status.  4. \*\*User Permissions\*\*: Access to the trademarks section shall be governed by user roles and permissions, ensuring that only authorized personnel can add, edit, or delete trademark entries.  5. \*\*Audit Trail\*\*: The system shall maintain an audit trail of all changes made to trademark entries, including additions, modifications, and deletions, to ensure accountability and traceability.  6. \*\*Integration with Legal Database\*\*: The trademarks section shall integrate with an external legal database to automatically update trademark statuses and provide alerts for renewals or expirations.  This requirement aims to enhance the organization's ability to manage its intellectual property effectively and ensure compliance with trademark regulations. | <Dynamic 1> | | <Dynamic 1>  If [<DE04813 - HPP Indicator> is equal to “Yes”]  ® CIBC Home Power Plan is a registered trademark of CIBC.  End | * Left Align   **Font Size:** 8 pt |

### PS40423 - Letter enclosing brochures for HLC/MCC clients - French

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Document Version: V3.0.0** | | | | |
| **A. Print Attributes** | | | | |
| **Attribute** | | **Description** | | |
| **Business Name** | | Letter enclosing brochures for HLC/MCC clients *<Specify how the business name for this Print Item>* | | |
| **Technical Name** | | UDBRCH *<Specify the system name for this Print Item (if available)>* | | |
| **Language** Specify language(s) for this version of the document [English/French/Other] If a second or third language version of the document is needed, include it within a separate subsection of this specification | | French *<Define the Language for this version of the Print Item>* | | |
| **Page Layout/ Margins** | | The page layout, margins, rules, text format criteria (font type, style, size, color etc.) will reference the Style Guide provided by Bank standards. *<Specify information about margins or layout (portrait, landscape, etc.) that need to be considered>* | | |
| **Other** | | * In this Print Specification Document, bolded texts and values in the Print rule column must appear bold in the Document. * For all dates, the leading zero(s) for the “day” must be suppressed if applicable. * For application number and amount data fields the leading zero(s) must be suppressed, if applicable. * There should be 1 space before “:” * All the amount fields should be displayed with 2 decimal places e.g. 15000.36 i.e. Value from backend/100 * All the rate fields should be displayed with 3 decimal places e.g. 5.366% * Leave 1 blank line space after each paragraph unless specified * All dates should be formatted DD month YYYY unless otherwise specified.*<List any other requirements about the Print Item not covered above>* | | |
| **B. Document Description**  Document each field/value is separate lines | | | | |
| **Identifier/Section** | **Print Body Text** | | **Print Rule** | **Other Information e.g., Business Rule, UC reference, or data element names as per Data Elements Catalogue** |
| Header Block:  CIBC Logo *<Use some means of identifying the block, section or print element of the Print Item being defined – use a separate row for each item (e.g. Header, Customer Name, Address Block, etc.)>* | Print New CIBC logo -  *<Supply the body text (complete with placeholders for the dynamic text or data elements that will be inserted) here. Use one row per body text element, as appropriate (word, phrase, sentence, paragraph, etc.). Avoid placing more than one paragraph in a single row.>* | | <Provide any logic associated with the text element that is to be printed, including rules governing when the element should be included or how it should be structured with respect to other elements. If there are multiple dynamic text elements and or Data Elements per body text section, list each as a separate row attached to the same body text specification (to the left).> | * Refer PS41120 for the New CIBC Logo details   *<Include any other relevant information regarding the section.>* |
| Regional Addresses | <Dynamic 1> | | <Dynamic 1>  If [<DE04282 – Property Province> is not equal to “Quebec(QC)”]:  Hypothèques CIBC Inc. P O Box 115, Commerce Court Postal Stn Toronto ON M5L 1E5  Else  Hypothèques CIBC Inc. CP 6003 Succursale Centre-Ville Montréal QC H3C 3B2  End | * Regional Address appears at the top right corner. * One space between City and Province, 2 spaces between Province and Postal Code. |
| Form ID | UDBRCH - 2013/05 | |  | * Appears on the bottom left corner of every page * Form ID should be horizontally aligned with the pre-defined position of Footer -Page number ( even if page number is not printed) * It should be vertically aligned to the left margin of the letter body |
| Document Sequence Number | <Document sequence Number> | |  | * Placed below the logo. * Appears just above the Mailing Address, it will always be 2.5 inches from the left margin. * Sequence number will be displayed in envelope window |
| \*\*Personal Lending\*\*  The system shall provide a feature that allows users to manage personal lending transactions. This feature will enable users to initiate, track, and manage loans between individuals. Users will have the ability to input borrower details, specify loan amounts, set repayment terms, and monitor payment schedules. Additionally, the system will provide notifications for upcoming payments and allow users to view the status of their lending transactions in real-time. The interface shall be user-friendly and accessible, ensuring that all users can easily navigate and utilize the personal lending functionalities. | <DE00532 – Customer Name1> <Dynamic 1> | | <Dynamic 1>  If [<Customer Name 2> is available]:  <DE00533 - Customer Name2>  End | * Left aligned * \*\*Customer First Name appears in proper case with a comma following\*\* |
| Borrower Mailing Address | <DE02091 - Mailing Address Line 1> <Dynamic 1> <Dynamic 2> <Dynamic 3> <Dynamic 4> | | <Dynamic 1>  If [<DE02092 - Mailing Address Line 2> is available]  <DE02093 - Attention Line for Mailing Address>  \*\*Feature Description:\*\*  The system shall provide an optional "Attention" line for mailing addresses, allowing users to specify a recipient's name. This line will be displayed prominently above the primary address fields.  \*\*Requirement Details:\*\*  1. \*\*Field Label:\*\* The field shall be labeled as "ATTN:" to clearly indicate its purpose. 2. \*\*Input Format:\*\* The input for the "Attention" line shall accept alphanumeric characters and allow a maximum length of 50 characters. 3. \*\*Optional Field:\*\* The "Attention" line shall be optional, enabling users to choose whether to include a recipient's name in their mailing address. 4. \*\*Display Logic:\*\* If the "Attention" line is populated, it shall be displayed in bold font above the primary address fields on all relevant output formats (e.g., printed labels, digital confirmations). 5. \*\*Validation:\*\* The system shall validate the input to ensure it does not exceed the maximum character limit and does not contain any special characters other than standard punctuation. 6. \*\*User Interface:\*\* The "Attention" line shall be positioned above the street address fields in the user interface for easy access and visibility.  \*\*Acceptance Criteria:\*\*  - The "Attention" line is visible and accessible in the mailing address input section. - Users can enter a name into the "Attention" line without encountering errors, provided the input adheres to the specified format and length. - The "Attention" line is correctly displayed in all output formats when populated.  End | * Left aligned, under Borrower Name * Mailing address must be in upper case * Leave no Blank line in between the mailing address * Leave minimum 2 blank line space after mailing address |
| <Dynamic 2>  If <DE02093 - Mailing Address Line 3> is available]  <DE02093 - Mailing Address Line 3>  End |
| <Dynamic 3>  If <DE02094 - Mailing Address Line 4> is available]  <DE02094 - Mailing Address Line 4>  End |
| <Dynamic 4>  If <DE02095 - Postal Code> is available]  <DE02095 - Postal Code>  End |
| Date | <Curent Date> | |  | * Left aligned. * <Date> is system-generated and represents the date the letter was processed. * Current Date should not display in envelope window. * Leave one blank line space after date |
| Subject Line/Mortgage Number | Objet : Prêt hypothécaire no <Dynamic 1>: <DE00529 - Mortgage Number>.<DE00530 - Charge Type> | | <Dynamic 1>  If [<DE04813 - HPP Indicator> is equal to “Yes”]:  en vertu de votre Programme ressource-toit CIBCMD  End | * Mortgage Number would be upto 9 digits. * Charge Type must have 1 digit |
| Property Address | Adresse de la propriété : <DE02114 - Property Address line 1> <Dynamic 1> | | <Dynamic 1>  If [<DE02115 - Property Address line 2> is available]:  , <DE02115 - Property Address line 2>  End | * Left align * Property address must be in upper case * Property Address will be displayed in single line * 1 blank line spaces after Property Address |
| Salutations | Madame, Monsieur, | |  | * Left aligned * Leave 1 blank line spaces after Salutations |
| **Letter Body** – It is split into paragraphs as shown below: | | | | |
| Paragraph 1 – Opening Note | Nous vous remercions de confier vos besoins hypothécaires à la CIBC. | |  | * Left Align * Name of coborrower who requested not to send separate copies of Cost Of Borrowing Documents. * Leave 1 blank line spaces after Paragraph 1 |
| Paragraph 2 | La Banque CIBC a pris l’engagement de combler tous vos besoins en matière de prêt hypothécaire et de services bancaires. Pour ce faire, nous nous efforçons de fournir le meilleur service à la clientèle qui soit et de prendre toutes les mesures nécessaires en vue de protéger les renseignements que vous partagez avec nous. À titre de renseignement, vous trouverez ci-joint deux documents, intitulés *Notre engagement envers vous* et *Protection des renseignements personnels*, qui décrivent de façon plus détaillée nos engagements. | |  | * Left Align * Leave 1 blank line spaces after Paragraph 2 |
| Paragraph 3 | Souvenez-vous que nous sommes là pour vous aider. Nous disposons d’un large éventail de solutions couvrant l’ensemble de vos besoins bancaires. Pour en savoir plus, n’hésitez pas à communiquer avec un conseiller CIBC ou à nous appeler au 1 800 465-2422. | |  | * Left align * Leave 1 blank line spaces after Paragraph 3 |
| Paragraph 4 | Nous vous remercions encore une fois d’avoir choisi la Banque CIBC. Nous serons heureux de continuer à répondre à vos besoins en matière de services bancaires. | |  | * Left Align * Leave 1 blank line spaces after Paragraph 4 |
| **End of Letter Body** | | | | |
| Closing Remarks | Veuillez agréer, Madame, Monsieur, nos salutations distinguées.      Représentant CIBC | |  | * Left Align |
| Note | P.S.Rappelez-vous que la Banque CIBC vous permet de suivre facilement l’évolution de votre prêt hypothécaire. Visitez simplement le site **www.cibc.com/francais** pour ouvrir une session à CIBC en direct et obtenir en tout temps les détails concernant votre prêt hypothécaire. | |  | * Left Aligned * The text marked bold must be printed as bold |
| ### Registered Trademark Information  The system shall provide a dedicated section for displaying registered trademark information. This section will include the trademark symbol (™ or ®) as applicable, ensuring proper usage in accordance with legal standards. The trademark information must be clearly visible and easily accessible to users, enhancing brand recognition and compliance with trademark regulations.   The implementation of this feature will include the following specifications:  - The trademark symbol must be displayed adjacent to the brand name wherever it appears within the application. - The system shall allow for the input and management of trademark details through the administrative interface. - The trademark information must be consistent across all platforms and devices, ensuring uniformity in presentation. - The feature shall include a tooltip or help icon that provides users with additional information regarding the significance of the trademark symbol when hovered over or clicked.  This requirement aims to uphold the integrity of the brand and ensure that all trademark-related information is accurately represented within the software. | <Dynamic 1> | | <Dynamic 1>  If [<DE04813 - HPP Indicator> is equal to “Yes”]  MD Programme ressource-toit CIBC est une marque déposée de la Banque CIBC.  End | * Left Align   **Font Size:** 8 pt |
| French Disclaimer | Le logo CIBC est une marque déposée de la Banque CIBC. | |  | * Left Align   **Font Size:** 8 pt |

## Print Item Mock-up

Note - The attached files are just samples for illustration purposes. The font size, & type in these may differ from the actual text in the Letter (English/French). Also, the arrangement of text w.r.t. spacing might differ in production.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Reference materials | | This table lists the documents that were used to create this document. | | |
| Document | Name | Issue Date | Author(s) |
|  | Mock-Up for Letter enclosing brochures for HLC/MCC clients – UDBRCHE | N/A | N/A |
|  | Mock-up for Letter enclosing brochures for HLC/MCC clients – UDBRCHF | N/A | N/A |

<Provide a mock-up of the Print Item sufficient to convey the general layout and structure of the data and information. It is not necessary to provide a separate mock-up of each permutation or combination of the structured content logic.>



# Document Control

REVISION HISTORY

A softcopy of the most current version of this document can be found at [*Release Management repository for this initiative*](https://teams.cibc.com/sites/liat14/Forms/AllItems.aspx).

|  |  |  |  |
| --- | --- | --- | --- |
| Version Number | Revision Date  dd/mm/yyyy | Summary of Changes | Document Author |
| 0.0.1 | 07/01/2013 | Initial Draft : MLIDT # 12505 - Docgen to DDGS Migration project (DocGen : PS00108) | Rohit Gathibandhe Amla Joshi  Anubha Jha |
| 0.0.2 | 28/01/2013 | Removed “Co-borrowers”  Marked Font = “Courier” for the Sender Address block in both English & French  Change Page Size = “Letter”  Corrected “Form Id” to “UDBRCH - 2013/03” | Anubha Jha |
| 0.1.0 | 15/03/2013 | 12505 SRD Signed –off | Rohit Gathibandhe |
| 0.1.1 | 18/03/2013 | CR03: 12505 – DocGen to DDGS Migration  Updated the English and French section as per the CR. | Rohit Gathibandhe |
| 0.1.2 | 01/04/2013 | CR05: 12505 – DocGen to DDGS Migration  Updated the French section as per CR | Rohit Gathibandhe |
| 1.0.0 | 29/05/2014 | Base-lined Document; Implemented DDGS R1 | Gladys Sta. Rosa |
| 1.0.1 | 04/12/2017 | PBPT 656 RESL Records Compliance - Phase 1  Updated ‘Production Rules’ section:  Removed reference to ‘FileNet’ | Saba Jalali |
| 1.1.0 | 14/05/2018 | PBPT 656 RESL Records Compliance - Phase 1  Signed off Baseline | Naz Yazdian |
| 2.0.0 | 25/10/2018 | RESL Records Compliance phase 1 – implemented on 9/30/2018  Baselined document | Naz Yazdian |
| 2.0.1 | 22/02/2022 | As per the Tetris Project\_Phase I Updated New CIBC logo information in English and French version | Mac Nwachukwu |
| 3.0.0 | \*\*Requirement Section: New Feature Implementation\*\*  \*\*Date: June 16, 2022\*\*  \*\*Feature Title: User Profile Customization\*\*  \*\*Description:\*\* The User Profile Customization feature allows users to personalize their profiles by modifying various elements such as profile pictures, display names, and bio descriptions. This feature aims to enhance user engagement and provide a more tailored experience within the application.  \*\*Requirements:\*\*  1. \*\*Profile Picture Upload:\*\*  - Users must be able to upload a profile picture from their device.  - Supported file formats include JPEG, PNG, and GIF.  - The maximum file size for uploads should not exceed 5 MB.  - Users should have the option to remove or change their profile picture at any time.  2. \*\*Display Name Modification:\*\*  - Users must be able to edit their display name.  - The display name should be limited to a maximum of 30 characters.  - The system should validate the display name to ensure it does not contain any special characters or profanity.  3. \*\*Bio Description:\*\*  - Users must be able to add a bio description to their profile.  - The bio should have a character limit of 150 characters.  - The system should provide a character count indicator to inform users of their remaining characters.  4. \*\*Privacy Settings:\*\*  - Users must have the ability to set their profile visibility to public or private.  - If set to private, only approved connections should be able to view the user's profile information.  5. \*\*Save and Cancel Options:\*\*  - Users must be able to save changes made to their profile or cancel any modifications before saving.  - A confirmation prompt should appear when users attempt to cancel changes.  6. \*\*Responsive Design:\*\*  - The User Profile Customization feature must be fully responsive and accessible on both desktop and mobile devices.  - The layout should adapt seamlessly to different screen sizes.  \*\*Acceptance Criteria:\*\* - The feature must pass all functional and usability tests. - User feedback should be collected post-implementation to assess satisfaction with the customization options. - The feature should be integrated into the existing user interface without disrupting current functionalities.  This requirement section outlines the necessary components for the User Profile Customization feature, ensuring a cohesive and user-friendly experience within the application. | Implementation Baseline | Vinayak Ghadge |
| 3.0.3 | 8/22/2025 | DDGS Feedback updated | Sibin Sijo |

Note that approval on this specific document is not implicitly required as this document should be referenced through a Solution Requirements Document as part of the Solution Requirements Package. Approval is provided at the Solution Requirements Package Level.