

# Library Solution Notes

*This should be read in conjunction with screen comps from Leah Buley & WCRS/Personal.*

## Library Filter

1. Form controls for filtering list of documents in library moves from top of page to left column.
2. A “view all documents” checkbox is added at the top of the categories list. Ticking this checkbox selects the related checkbox for all categories automatically. Unticking this checkbox deselects any selected categories automatically.
3. Filtering categories are revised and consolidated as follows:

Category	Description of contents
Articles	articles previously located in the “what the professionals say” section
Factsheets & fund information	all fund factsheets, product lists (also categorized under “Brochures and guides”), monthly performance PDFs, Dividend calendar
Brochures & guides	iShares brochure, ETFs and FI ETFs explained, Key features document (UK only), FI FAQs, true liquidity of iShares, product list (also categorized under “Factsheets & fund information”), BGI profile
Research papers	(not for retail) - there are around 4 research papers
Annual reports & accounts	split by company, in chronological order
Prospectuses & supplements	the two prospectuses first, then all the supplements in alphabetical order
Index information	all index factsheets, brochures

	(FTSEurofirst) and index methodologies
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4. The default behavior when the page loads will be for “view all documents” and all category checkboxes to be selected.

#### Document list

5. The following message will added above the document list:

**Documents may be viewed as PDFs, sent by post, or saved in your digital briefcase.** To order by post or use your briefcase, please first sign in [links to sign in page]. Not registered? Register here. [links to registration page]

6. A background color (#EDECE0) is added to alternating rows of the document list table.
7. The “last updated” column is removed from the document list.
8. The hyperlink will be removed from the document name and icons will be added indicating the available delivery options for each document. The icons will function as follows:
  - 8.1. *PDF icon* – All documents will include the PDF icon in the “delivery options” column. Clicking on this icon will open the document as a PDF in a new window.
  - 8.2. *Mail icon* – All documents available for delivery by post will include the mail icon in the “delivery options column.” This icon will be displayed irrespective of whether the user has previously registered or logged in on iShares.net.
    - 8.2.1. If the user has not logged in, clicking this icon will direct the user to the registration page, which includes a login link prominently displayed in the top right corner. Once the user has completed registering or logging in, he or she will be redirected to the “literature by post” page. On the “literature by post” page, a “1” will be prepopulated in the “copies” field for the document the user selected in clicking the mail icon on the previous page.
    - 8.2.2. If the user is already logged in, clicking this link redirects the user to the “literature by post” page. On the “literature by post” page, a “1” will be prepopulated in the “copies” field for the document the user selected in clicking the mail icon on the previous page.
  - 8.3. *Briefcase icon* – All documents will include the briefcase icon in the “delivery options” column.
    - 8.3.1. If the user has not logged in, clicking this icon will direct him or her to the registration page, which includes a login link prominently displayed in the top right corner. Once the user has completed registering or logging in, he or she will be directed back to the library page, and a new window will

open indicating the document that has been added to the user's briefcase. From this window, the user can click a button to be redirected to his or her briefcase, or simply close the window and return to the library page.

- 8.3.2. If the user has already logged in, clicking this link will open a new window indicating the document that has been added to the user's briefcase. From this window, the user can click a button to be redirected to his or her briefcase, or simply close the window and return to the library page.