

# CUSTOMER ADVISORY BOARD



Welcome

## Login

Email

Password

Login

[Forgot your password?](#)

Member login. All site content is accessible to members only.

Password reset functionality: Members can enter their email address to receive an email with a link to reset their password.

## CUSTOMER ADVISORY BOARD

Search across Network / Calendar / Topics / News



THOMSON REUTERS

Home

Network

Calendar

Topics

search CAB

Logged in as [Member Name](#) | [Logout](#)

## Welcome...[Member Name]

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## Latest News

27-07-2011 [Quisque mollis metus vitae nislmalesuada...](#) 21-06-2011 [Duis aute irure dolor in reprehenderit...](#) 05-03-2011 [Ut enim miven...](#)

## Latest CAB Topics

03-09-2011 - [Investment Banking](#)03-09-2011 - [Regulation](#)03-09-2011 - [RDEs](#)[View all topics](#)

## Upcoming Events

 03-09-2011 - [New York](#) 03-09-2011 - [New York](#) 03-08-2011 - [Hong Kong](#) 28-07-2011 - [London](#)[View full calendar](#)

News items sourced from RSS Feeds + Custom news items linking through to full news article

Links through to personal profile / editable

# CUSTOMER ADVISORY BOARD



Home Network Calendar Topics search CAB Logged in as Member Name | Logout

## Network

Filter By

Board Type: Market Board Company: Bank of America Merrill Lynch

Region

Name: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

- |   |   |
|---|---|
| <a href="#">Member name</a><br>Job Title<br>Company Name<br>CAB Board | <a href="#">Member name</a><br>Job Title<br>Company Name<br>CAB Board |
| <a href="#">Member name</a><br>Job Title<br>Company Name<br>CAB Board | <a href="#">Member name</a><br>Job Title<br>Company Name<br>CAB Board |
| <a href="#">Member name</a><br>Job Title<br>Company Name<br>CAB Board | <a href="#">Member name</a><br>Job Title<br>Company Name<br>CAB Board |

[Member name](#)  
Job Title  
Company Name  
CAB Board

1234567890  
fname.lname@domain.com  
[linkedin profile](#)  
[twitter feed](#)  
[blog](#)  
[name@messenger.com](#)

Board Member Associations:  
[Association name](#)  
[Association name](#)

- LONDON SELL-SIDE BOARD  
UK BUY-SIDE BOARD  
HK MARKETS BOARD  
NY SELL-SIDE BOARD  
NY TECHNOLOGY & OPERATIONS BOARD  
NORTH AMERICAN BUY-SIDE BOARD
- Europe, Asia, North-America \* Not confirmed
- Click-through to full member profile page



CUSTOMER ADVISORY BOARD



Home Network Calendar Topics

search CAB

Logged in as Member Name | Logout

My Profile / Member Name



Member name

Job Title  
Company Name  
CAB Board  
Field of expertise

- 1234567890
- fname.lname@domain.com
- linkedin profile
- twitter feed
- blog
- name@messenger.com

Board Member Associations:  
Association name  
Association name

Edit Details

My Biography

Member biography. 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.

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Edit

My Events

View member's events past, present, future

Date	Title	Venue
13-11-2011	<a href="#">NY Markets Board Meeting</a>	New York
01-11-2011	<a href="#">NY Technology and Operations Board Meeting</a>	New York
27-09-2011	<a href="#">London Sell-side Board Meeting</a>	London
03-09-2011	<a href="#">UK Buy-side Board Meeting</a>	London

View Full Calendar

1. Edit option available when viewing My Profile. Edit-in-place, or link-through to a new page:

Form fields include: Picture, Upload, Browse, First name, Last name, Job title, Company, Board, Member biography, Phone, Email, Public LinkedIn Profile Link, Twitter Profile Link, Blog Link, Field of Expertise, Board Member Associations (Association Name, URL), Add Another, Save.

Allows specifying field of interest not already in the list:

Other    
 Please specify:



## CUSTOMER ADVISORY BOARD



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Home

Network

Calendar

Topics

search CAB

Logged in as [Member Name](#) | [Logout](#)

## Calendar

Filter By

Date:  Board: Region: 

Date	Title	Location	
13-11-2011	<a href="#">NY Markets Board Meeting</a>	New York	+
01-11-2011	<a href="#">NY Technology and Operations Board Meeting</a>	New York	+
27-09-2011	<a href="#">London Sell-side Board Meeting</a>	London	+
03-09-2011	<a href="#">UK Buy-side Board Meeting</a>	London	+
27-09-2011	<a href="#">Asia Customer Advisory Board Meeting</a>	Hong Kong	+
07-09-2011	<a href="#">NY Markets Board Meeting</a>	New York	+
03-09-2011	<a href="#">UK Buy-side Board Meeting</a>	London	+
27-09-2011	<a href="#">Asia Customer Advisory Board Meeting</a>	Hong Kong	+
07-09-2011	<a href="#">NY Markets Board Meeting</a>	New York	+

Full details

13 November 2011

## NY Markets Board Meeting

New York

Formatted text containing event details such as summary and address.

[View map](#) could link to Google maps.

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[Add event details to Outlook](#) [Agenda](#) [Pre-reading](#) [Presentation materials](#) [Minutes](#) [Supporting materials](#)

Alternative view for members who have already confirmed their attendance

You are registered for this event

- Store registration data
- Email member confirmation
- Email admin confirmation
- Email member reminder

# CUSTOMER ADVISORY BOARD



## Topics

Topics are grouped in buckets first, then ordered by most recent events (including upcoming events).

### Topic Bucket A

Topic	Subject Matter Experts	Events
Algorithmic Trading	Mike Stepanovich	<a href="#">HK Markets Board Meeting: 16 Apr 2011</a> <a href="#">NY Markets Board Meeting: 16 Apr 2011</a> <a href="#">UK Sell-side Board Meeting: 03 Mar 2011</a>
Breakingviews	John Sinclair Foley Richard Beales	<a href="#">HK Markets Board Meeting: 16 Apr 2011</a> <a href="#">NY Markets: 7 Apr 2011</a>

### Topic Bucket B

Topic	Subject Matter Experts	Events
Investment Management	John Cobb	<a href="#">HK Markets Board Meeting: 16 Apr 2011</a>
Commodities Trading	John Cobb	<a href="#">HK Markets Board Meeting: 7 Apr 2011</a>
Investment Banking	Tim Baker Peter Markey	<a href="#">NY Tech/Ops: 14 Apr 11</a> <a href="#">NY Markets Board Meeting: 7 Apr 2011</a>

### Topic Bucket C

Topic	Subject Matter Experts	Events
Regulation	Rob Hegarty	<a href="#">NY Tech/Ops Board Meeting: 14 Apr 2011</a>
Quantitative Analytics	Chris Volpe	<a href="#">NY-Tech/Ops Board Meeting: 14 Apr 2011</a>
Investment Management	Neil Masterson Ian Brocklehurst Malcolm Post	<a href="#">UK Buy-side Board Meeting: 7 Jun 2010</a>

Links through to topic details page

All content could be displayed on one page, or only the topic buckets could be displayed and then click through to the topics



## CUSTOMER ADVISORY BOARD



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[Home](#)[Network](#)[Calendar](#)[Topics](#)Logged in as [Member Name](#) | [Logout](#)

## Topic Name

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Dolor sit amet

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## Subject Matter Experts

[Expert name](#)[Expert name](#)

## Meetings and Materials

[HK Markets Board Meeting: 16 Apr 2011](#)[Minutes](#)[Presentation Slides](#)[NY Markets Board Meeting: 16 Apr 2011](#)[Presentation Slides](#)[UK Sell-side Board Meeting: 03 Mar 2011](#)[Minutes](#)[Presentation Slides](#)

Lists all events with materials tagged with the topic. Only displays materials tagged with the topic, not all event materials.

## CUSTOMER ADVISORY BOARD

Search across Network / Calendar / Topics / News



Home

Network

Calendar

Topics

search CAB

Logged in as [Member Name](#) | [Logout](#)

## Search Results "Compliance" 5 Documents, 2 Members and 1 News item found

Filter By

Date:   Venue: 

## Documents

[HK Markets Board Meeting: 16 Apr 2011](#) [Minutes](#) [Presentation Slides](#)[NY Markets Board Meeting: 16 Apr 2011](#) [Presentation Slides](#)[UK Sell-side Board Meeting: 03 Mar 2011](#) [Minutes](#) [Presentation Slides](#)

## Network/Experts

Name	Company	Board	Field of Expertise
David Bee	Standard Chartered Bank	Commodities	UK Buy-sie
Richard Beales	Bank of England	Investment Management	New York Sell-side
Mike Stepanovich	Thomson Reuters	Algorithmic Trading	London Sell-side

## News

Date	News title
Date	<a href="#">News title</a>
Date	<a href="#">News title</a>

1. Meetings and materials (Documents) search results: All documents that are tagged with the search term.
2. Network/Experts: All members where the search term is in the name, company, board or field of expertise.
3. News: All custom news items where the search term is in the title or story.

In these search results, and throughout the site, where members and experts are displayed together, experts should be highlighted or differentiated in some way.





# CUSTOMER ADVISORY BOARD ADMINISTRATION



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[Updates](#)



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Welcome

[Members](#)

[Meetings](#)

[Topics](#)

[Keywords](#)

[News](#)

Login: Authentication to be handled by SAFE login, of course only specific SAFE users will be authorised to access this site's admin.

## CUSTOMER ADVISORY BOARD ADMINISTRATION



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## Members

Add a New Member

Manage Field of Expertise List

Search

Name

Company

Search

[Member name](#)

Job Title

Company Name

CAB Board

[Member name](#)

Job Title

Company Name

CAB Board

[Member name](#)

Job Title

Company Name

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Job Title

Company Name

CAB Board

Links through to a page for managing all Field of Expertise values, to keep these consistent. Because members can edit their field of expertise on site, different members may enter the same field differently (abbreviated etc.). This will be a simple list page that allows administrators to add/edit/delete values, but also to assign a field of expertise to an existing field of expertise, and it will update for all members/experts.



# CUSTOMER ADVISORY BOARD ADMINISTRATION



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 Logged in as [Administrator Name](#) | [Logout](#)

## [Members](#) > Member Name

  
  
  
  
  

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Board Member Associations:

<input type="text" value="Association Name"/>	<input type="text" value="URL"/>
<input type="text" value="Association Name"/>	<input type="text" value="URL"/>

Allows specifying field of interest not already in the list:

▾  
Please specify:

## CUSTOMER ADVISORY BOARD ADMINISTRATION



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## Meetings

[New](#)

Filter By

Date:

November ▼

2011 ▼

Venue:

New York ▼

Date ▲	Title	Venue		
13-11-2011	NY Markets Board Meeting	New York	<a href="#">Edit</a>	
01-11-2011	NY Technology and Operations Board Meeting	New York	<a href="#">Edit</a>	
27-09-2011	London Sell-side Board Meeting	London	<a href="#">Edit</a>	
03-09-2011	UK Buy-side Board Meeting	London	<a href="#">Edit</a>	
27-09-2011	Asia Customer Advisory Board Meeting	Hong Kong	<a href="#">Edit</a>	
07-09-2011	NY Markets Board Meeting	New York	<a href="#">Edit</a>	
03-09-2011	UK Buy-side Board Meeting	London	<a href="#">Edit</a>	
27-09-2011	Asia Customer Advisory Board Meeting	Hong Kong	<a href="#">Edit</a>	
07-09-2011	NY Markets Board Meeting	New York	<a href="#">Edit</a>	



# CUSTOMER ADVISORY BOARD ADMINISTRATION



Home Members Meetings Topics News Updates

Logged in as Administrator Name | Logout

## Meetings > Add/Edit Meeting

CAB Meeting  Other Event

Title

Date

Venue

Region

**B I U** abc style

Formatted text containing event details such as summary and address.  
[View map](#) could link to Google maps.  
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**Documents** **Add**

[Agenda](#) Tags: Algorithmic Trading, Commodities Trading, Investment Banking

[Pre-reading](#) Tags: Algorithmic Trading, Commodities Trading, Investment Banking

**Save**

### Add/Edit Meeting Document

Title

Keywords

- Algorithmic Trading
- Commodities Trading
- Investment Banking
- Quantitative Analytics
- Regulation

**Save**

When selecting Other Event, the fields and document listing is replaced with:

Title

Link

When uploading a document, it is scanned and any existing keywords found will automatically be selected.

## CUSTOMER ADVISORY BOARD ADMINISTRATION



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## Topics

Topics are ordered by buckets first, then most recent events (including upcoming events).

New

Manage Buckets

Bucket	Topic	Subject Matter Experts	Events		
Bucket A	Algorithmic Trading	Mike Stepanovich	HK Markets Board Meeting: 16 Apr 2011 NY Markets Board Meeting: 16 Apr 2011 UK Sell-side Board Meeting: 03 Mar 2011	Edit	
Bucket A	Breakingviews	John Sinclair Foley Richard Beales	HK Markets Board Meeting: 16 Apr 2011 NY Markets: 7 Apr 2011	Edit	
Bucket B	Investment Management	John Cobb	HK Markets Board Meeting: 16 Apr 2011	Edit	
Bucket B	Commodities Trading	John Cobb	HK Markets Board Meeting: 7 Apr 2011	Edit	
Bucket B	Investment Banking	Tim Baker Peter Markey	NY Tech/Ops: 14 Apr 11 NY Markets Board Meeting: 7 Apr 2011	Edit	
Bucket C	Regulation	Rob Hegarty	NY Tech/Ops Board Meeting: 14 Apr 2011	Edit	
Bucket C	Quantitative Analytics	Chris Volpe	NY-Tech/Ops Board Meeting: 14 Apr 2011	Edit	

Links through to a page for adding/removing the buckets that topics can be organised in





## CUSTOMER ADVISORY BOARD ADMINISTRATION



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New Bucket

[Add](#)

Bucket		
Bucket A	Edit	
Bucket A	Edit	
Bucket B	Edit	
Bucket B	Edit	
Bucket B	Edit	
Bucket C	Edit	
Bucket C	Edit	
Bucket C	Edit	

# CUSTOMER ADVISORY BOARD ADMINISTRATION



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Logged in as [Administrator Name](#) | [Logout](#)

## Topics > Add/Edit Topic

Topic Bucket

Name

Publish date

**B** **I** **U** **abc** style

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Dolor sit amet  
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### Keywords

- Algorithmic Trading
- Commodities Trading
- Investment Banking
- Quantitative Analytics
- Regulation

The site displays all meeting materials that are tagged with these keywords on the Topics and Topic Details pages.

### Subject Matter Experts

July Lee

John Smith

Auto-complete drop-down list-box of experts.

Another option discussed was automatically linking experts to topics based on their area of expertise, in which case this box won't be here.



## CUSTOMER ADVISORY BOARD ADMINISTRATION



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## News

[New](#)

Filter By

Date:  

Date	Title		
13-11-2011	A Note from Debra Walton	<a href="#">Edit</a>	<input type="checkbox"/>
01-11-2011	News Title	<a href="#">Edit</a>	<input type="checkbox"/>
27-11-2011	Another News Title	<a href="#">Edit</a>	<input type="checkbox"/>

Links through to add/edit page with Date, Title and a richtext editor for the news story.

## CUSTOMER ADVISORY BOARD ADMINISTRATION



THOMSON REUTERS

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## Updates

Filter By

Date:  

13-11-2011	Joe Smith has an updated phone number: 555-12345
01-11-2011	Julie Lee has an updated email address: julie.lee@company.com
13-11-2011	Joe Smith has an updated phone number: 555-12345
01-11-2011	Julie Lee has an updated email address: julie.lee@company.com
13-11-2011	Joe Smith has an updated phone number: 555-12345
01-11-2011	Julie Lee has an updated email address: julie.lee@company.com
13-11-2011	Joe Smith has an updated phone number: 555-12345
01-11-2011	Julie Lee has an updated email address: julie.lee@company.com
13-11-2011	Joe Smith has an updated phone number: 555-12345

Profile updates made via the client-facing site is logged and shown on this page.