

CITMA – Gap Analysis and Web Functional Specification

Follow Up questions

Completed By CITMA					Completed my Oomi	
Raised By	Section	No.	Query/Change	Page No.	Response	Status
Richard	Site-wide areas	2.5.3	Header, bullet 4: Should be, see join link when not logged in as a member (ie if logged in as a non-member user, they should see join link)	53		
Richard	Site-wide areas	2.5.3	Header, bullet 5 Should use preferred name	54		
Richard	Site-wide areas	2.5.3	Header, bullet 6 What is the default search results order? Relevance I presume?	54		
Richard	Site-wide areas	2.5.3	Footer, Need to add – See social media buttons with links for Twitter, LinkedIn, YouTube	54		
Richard	Site-wide areas	2.5.3	The above point needs to appear in admin as well as user	54		
Richard	Content templates	2.5.4	Partner panel – Can the order be randomised?	55		
Richard	Content templates	2.5.4	How will you indicate if it is member only content?	57		
Richard	Content templates	2.5.4	Resource listing – Must have editable content to introduce the resource listing page	57		
Richard	Content templates	2.5.4	Resource detail – In what order is the related content in? Can we select particular related content to display?	57		
Richard	Content templates	2.5.4	Resource detail – What is displayed if there is no author?	57		
Richard	Membershi p	2.5.5	Apply online – step 3 Should say intro, not into	60		
Richard	Membershi p	2.5.5	If select I don't have sponsors, this should grey out/remove sponsor input boxes. Is this recorded in CRM? Or does email go to membership officer?	60		
Richard	Membershi p	2.5.5	Declarations – the 2 nd declaration shown is only relevant to Ordinary. Other categories need to have other declaration. Need a separate 2 nd declaration for each category	62		
Richard	Membershi p	2.5.5	Can we edit text of declaration?	62		
Richard	Membershi p	2.5.5	In assumption, there is mistake bullet 1.2, the end of this sentence is in the 2 nd main bullet	62		

Richard	Membershi p	2.5.5	In assumptions – Will different offices for same firm show up in search for organisation lookup?	62		
Richard	Membershi p	2.5.5	Login – needs to mention right hand content container, this is missing in a number of places	63		
Richard	Membershi p	2.5.5	Web registration- Will the submit button be inactive until the Fields are filled, rather than the form is completed?	66		
Richard	Web registration	2.5.5	Web registration - For mailing preferences, need to be clear that they will receive info about OUR events, MY membership, OUR resources – this will improve click rate	66		
Richard	Update details	2.5.5	Non-checked specialisms and interests should be greyed out to show them what they are missing	66		
Richard	Update details	2.5.5	If they are not eligible to appear in public directory, this greyed out option should not be shown. Alternatively, tell them that they are not eligible	66		
Richard	Update details	2.5.5	How short is short bio?	66		
Richard	Update details	2.5.5	Why no postcode lookup on personal address?	67		
Richard	Update details	2.5.5	Is there size limit on bio pic. Can it have feature area, if slightly unusual pic, eg they are to one side?	67		
Richard	Update details	2.5.5	It is not correct to say that organisation will not be shown if a student application. They are very likely to have an organisation!!	67		
Richard	Update details	2.5.5	Under user “organisation” option to edit. How will this work. If main contact leaves org, how is this managed?	67		
Richard	Update details	2.5.5	Update org details – Can admin be able to add logo?	69		
Richard	Update details	2.5.5	What happens if there is no main contact?	70		
Richard	Update details	2.5.5	Assumptions – 2 nd bullet - Contact not contract	70		
Richard	Renewal	2.5.5	Subscription history - Pending subscriptions should be default view	72		
Richard	Renewal	2.5.5	I disagree that this should be the approach: If a financial or main organisation contact this screen will show the subscriptions indicated ' from members who work for that organisation who have chosen 'My organisation will pay' via update details or via the join process.	72		

			I think it should be that all unpaid members at that firm should appear in tickbox list. Regardless of who pays.			
Richard	Renewal	2.5.5	Under step 1, user. 2 nd main bullet, 4 th sub bullet. This sentence does not make any sense. I assume you mean: Checkboxes are pre-selected	72		
Richard	Renewal	2.5.5	Step 2 – will they see pro-rata ‘discount’ at checkout?	73		
Richard	Renewal	2.5.5	Bottom box of p73, CITMA should be able to manually choose when they are lapsed. Is this the case?	73		
Richard	Renewals	2.5.5	As are going to be testing the bulk renewals with a few external companies. Even if scope signed off will there be room for some changes	73		
Richard	Logged in user page	2.5.6	Main bullet 4 – presume they only see a notification banner, if one is applicable to them?	74		
Richard	Find a CTMA	2.5.7	Directory detail, should have country code prefix (and across website)	76		
Richard	Member only directory	2.5.8	Needs to include a filter for category, and show category in member profile page	76		
Richard	Jobs board	2.5.9	Can we have countries/ international? Some jobs are overseas	78		
Richard	Jobs board	2.5.9	Can location be anywhere, sometimes it is multiple, sometimes is more general.	78		
Richard	Events	2.5.11	Is default to show unfiltered events? ie all?	81		
Richard	Events	2.5.11	Data of birth is it required for			
Richard	Events	2.5.11	Event detail – is right hand column info sticky?	82		
Richard	Events	2.5.11	Event detail – bullet 2 – If other rates are available eg student, will that show up?	82		
Richard	Events	2.5.11	Events booking – do we need to record the DOB of new registrants?	83		
Richard	Events	2.5.11	Event booking – need to add button for ‘I don’t know this delegate’s details yet’	83		
Richard	Event Booking	2.5.11	Date of birth should not be a mandatory field.	83		
Richard	Events booking history	2.5.11	‘if booker see cost of booking’ Why?	85		
Richard	Events	2.5.11	Discount rates from Oomi will be applied here?	83		
Richard	Shop	2.5.12	Are postage rates automatically set			
Richard	Event listing widget	2.5.14	First bullet should say: see a list of events, with next upcoming event first	108		

Richard	Gallery		Does this mean that there is no need for Flickr?	110		
Richard	Gallery		Is there a bulk upload facility	110		
Richard	Email marketing template	2.5.14	This needs work! Even with updated design from Luke on 18.4.2018	112		
Richard	Email marketing		Needs more clarity on the feature so please can Luke from Pixl8 call Richard			
Richard	Optional extras	2.6.3	Should not be extra cost for members' directory	123		
Richard	General		All "time" fields to be displayed in the format of a 12-hour clock with am/pm			