COVERDELL & COMPANY
Partners for Marketing • Marketing for Results

Web Publishing Tool

User Guide

May, 2001

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Part One – Getting Started

1. About the Publishing Tool

Purpose of the Tool

The *Publishing Tool* is a software system designed for creating web sites. These web sites market specific versions of insurance products as offered by banks and other institutions.

The design of the Publishing Tool helps you to quickly produce sites customized for specific institutions. You can do this by basing a site on a default site for a product and then changing only specific information.

About This Guide

This *User Guide* provides complete instructions on using the Publishing Tool and explains the concepts you'll need to understand to use it.

Who Should Use This Guide

The guide contains information for two kinds of readers:

- **Technical staff** who will create the product sites, default content, and publishing configurations. These tasks require knowledge of Active Server Pages (ASP) programming, databases, and web server configuration.

- **Marketing staff** who will use the default content to create real-world sites for customers, and create campaigns to publish and track the results of these marketing sites. These tasks require knowledge of insurance products plus basic familiarity with web publishing and HTML tags.

Organization of the Guide

This guide is divided into three parts.

Part	Contents	Intended Audience
1	Describes the Publishing Tool and its concepts and workflow.	All readers
2	How to create products and pages with default content. How to set up publishing configurations to publish sites to test and live web servers.	Technical staff
3	How to adapt the default products and pages to create real-world marketing web sites. How to create campaigns to publish the sites.	Marketing staff

Workflow and Concepts

This section presents an overview of the workflow for using the Publishing Tool. With each step of the workflow, the related concepts are explained.

Tasks for Technical Staff

These are the major tasks performed by programmers and IT staff who implement and support the Publishing Tool.

More Information: See Sections 3 and 4 for more information and instructions.

1 **Create a new product.**

Concept: A *product* can be any type of insurance product that will ultimately have a published web site to describe it. (In terms of the Publishing Tool, you can think of a product as equivalent to a site.)

Creating a product automatically creates the *default content version* of the product.

Concept: A *content version* is a single instance of a product.

Example product: Accident Disability

Example default content version: Accident Disability/Default

2 **Create the pages for a product.**

Concept: *Pages* are HTML file templates that define the basic content and structure of an actual published web page. Pages are always associated with a particular product.

3 **Create page content records for the default content version.**

Concept: A *page content record* defines a single element of content on a page. A page content record can be a single text string or HTML tag, or it can include many HTML tags, JavaScripts, ASP code segments, and text values.

The page content records defined for the default content version of a product often include replaceable tags. *Replaceable Tags* are data elements used by the Publishing Tool. They are equivalent to variables or placeholders. When a site is published, any replaceable tags it contains are replaced by the values defined for them.

Note: Tasks 1-3 complete the workflow for creating default products.

4 **Set up publishing configurations.**

Concept: A *publishing configuration* defines the logical paths and ODBC data source for publishing content versions from a development server to a test or live web server.

Tasks for Marketing Staff

These are the major tasks performed by marketing staff who use the Publishing Tool to create and publish web sites.

More Information: See Sections 5 and 6 for detailed information and instructions.

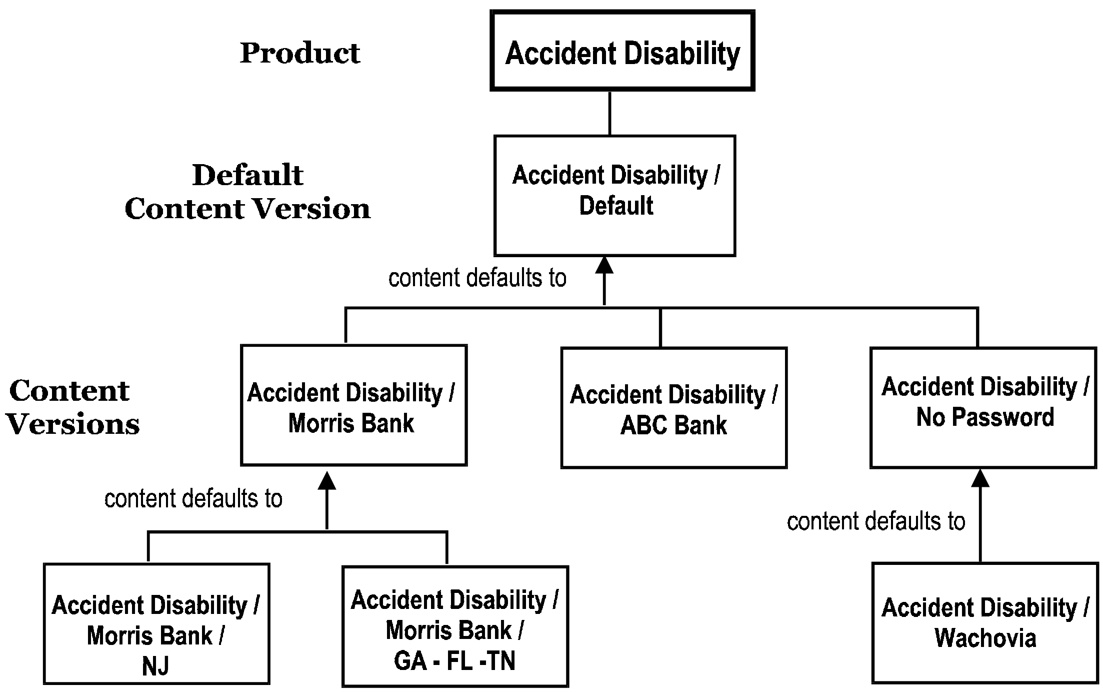
1 Create a content version.

Concept: A *content version* is a specific instance of a product customized for a real-world customer. A content version represents one product site as it will be published to the Web.

Example: Accident Disability/Morris Bank

When creating a content version, you can select the product/default version or any other content version of the product to be the default. The Publishing Tool thus provides *two levels* of defaults for any content version. Changes made to either the product/default or the default you select will be inherited by your content version.

Example: Accident Disability/Morris Bank - NJ might be created, with Accident Disability/Morris Bank selected as its default. Changes made to either the Accident Disability/Default or Accident Disability/Morris Bank content versions would be inherited by Accident Disability/Morris Bank – NJ, whenever all were published.

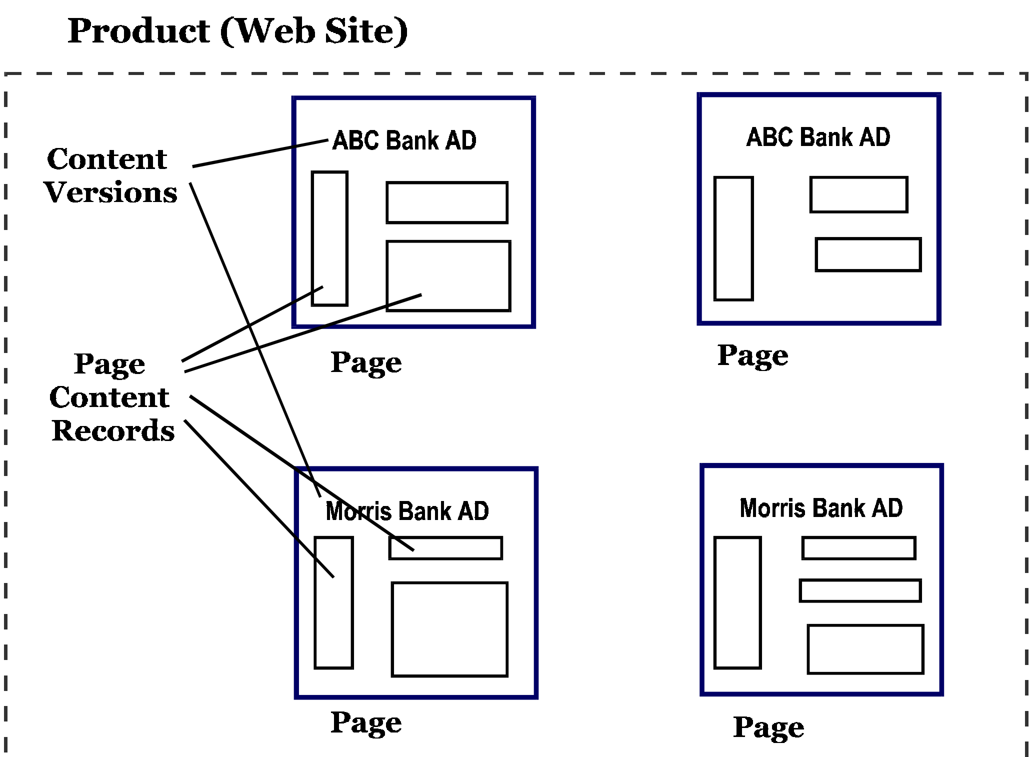


The diagram shows a typical hierarchy of content versions for a product. Content versions receive (inherit) default content from the versions above them in the hierarchy.

2 Edit the page content records for the new content version.

Concept: A *page content record* defines a single element of content on a page. A page content record can be a single text string or HTML tag, or it can include many HTML tags, text values, and segments of program code. Since the same content is often used on multiple pages, a page content record can be defined once and re-used on many pages.

At this stage, you change whatever content for your new site is different from the defaults. You can either create new page content records for just the content that differs, or you can copy all of the page content records from the default content version and then change the ones that differ. (In the latter case, you must be sure to delete the content records that are not different from the default.)



Page content records are blocks of content that appear on published web pages. The same page content record can appear on multiple pages.

3 Create a campaign to publish the site.

Concept: A *campaign* is a set of instructions used to publish and then track the results of a site.

A campaign contains *switches* that are set to turn on or off the display of certain variable content within a site. Switches are defined by programmers but are set by the marketing person who creates the campaign.

4 Publish the site.

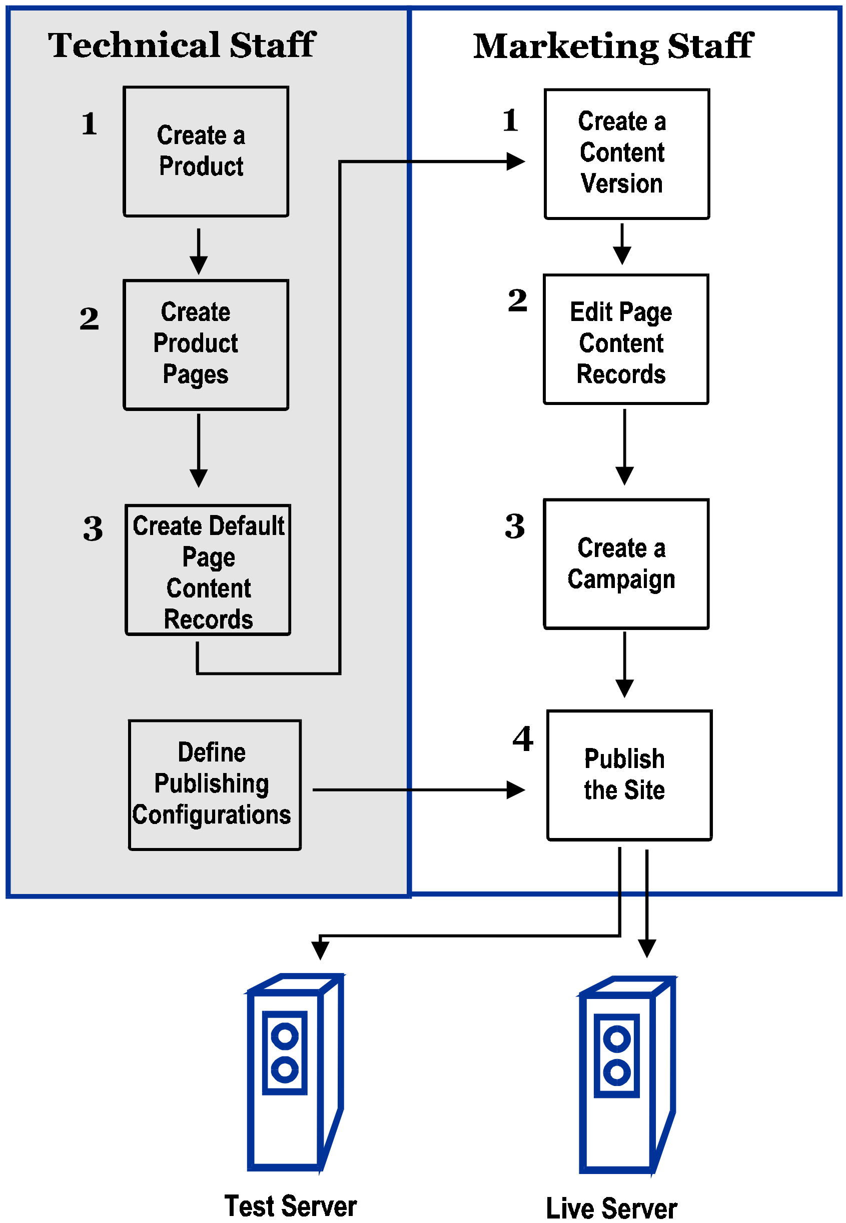
You publish the site by selecting a defined publishing configuration and then transferring the files to a web server.

Concept: A *publishing configuration* is a set of instructions that tell the Publishing Tool where and how to publish your web sites. Publishing configurations are defined by the technical staff.

Normally, you'll publish first to a test server, so you can test and proofread your pages. After you correct any errors, you'll publish to a live web server.

Workflow Diagram

This diagram illustrates the major tasks for both technical and marketing staff.



2. Using the Publishing Tool

This section explains basic procedures for using the Publishing Tool, including setting up your web browser, logging in to the system, and changing user information.

Web Browser Required

To use the Publishing Tool, you need Microsoft Internet Explorer version 4.0 or higher, with JavaScript and cookies enabled.

Setting Up Your Web Browser

The Publishing Tool includes a special ActiveX control that enables you to edit web page content records. Before you use the Tool, you need to set up your browser so it can download and install the ActiveX control.

1 Start Internet Explorer.

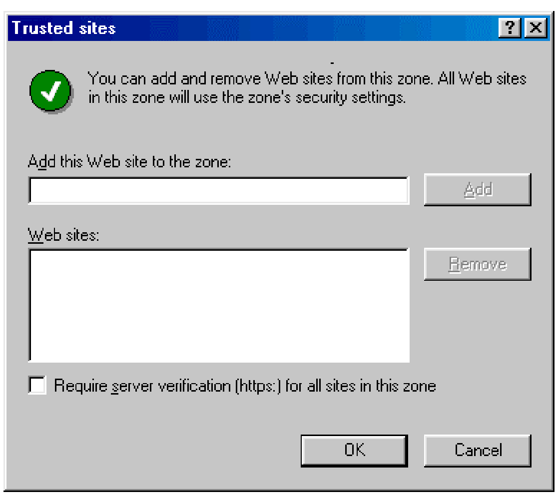
2 Click the Tools menu and choose Internet Options.

The Internet Options dialog box is displayed.

3 Click the Security tab. Click the Trusted Sites icon.

4 Click the Sites button.

The Trusted Sites dialog box is displayed.



5 Make sure the Require server verification checkbox is cleared.

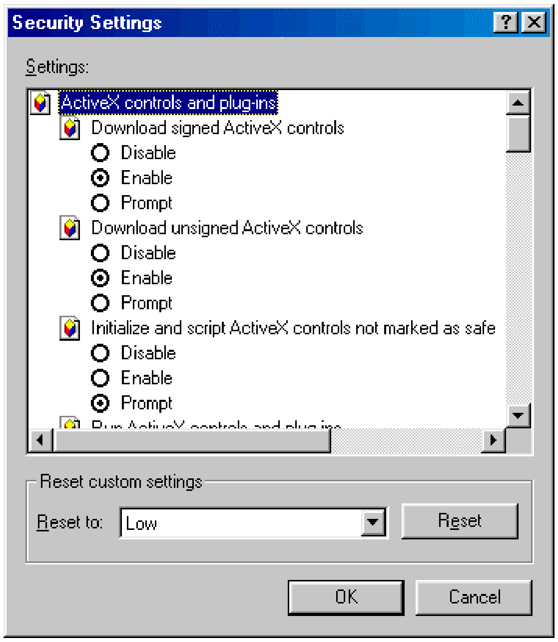
6 In the Add this Web site.. field, type in the URL of the Publishing Tool and click Add.

Note: This URL will be provided to you.

7 Click OK to close the dialog box..

8 Click the Custom Level button on the Internet Options > Security tab.

The Security Settings dialog box is displayed.



9 Click Enable under Download unsigned ActiveX controls, then click OK.

10 Click OK to close the Internet Options dialog.

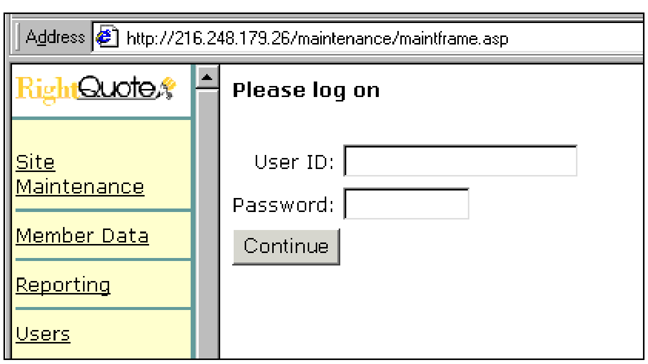
Your browser is now configured for the Publishing Tool.

Logging In to the Publishing Tool

Before you can use the Publishing Tool you log in to the system. The URL, User ID and Password will be provided to you.

1 Point your browser at the URL you've been given for the Tool.

The Log In page is displayed. It shows a Log In form on the right and a menu of choices on the left.



2 Type in your User ID and Password, then click Continue.

The login is processed and you are prompted to select an option from the menu on the left.

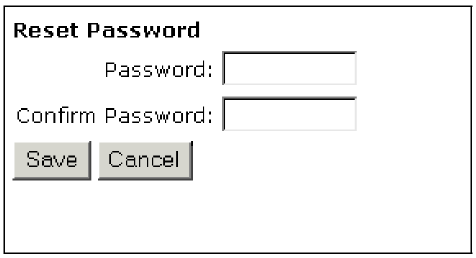
Changing User Information

If you are not an administrator, you can *only* change the password for your own user account. If you are an administrator, you can change information for any user account, as well as add and delete users.

Changing Your Password

1 Click the Users link in the left frame and then click Reset Password.

A page is displayed for you to change your password.



2 Type your new password in the Password field and type it again in the Confirm Password field.

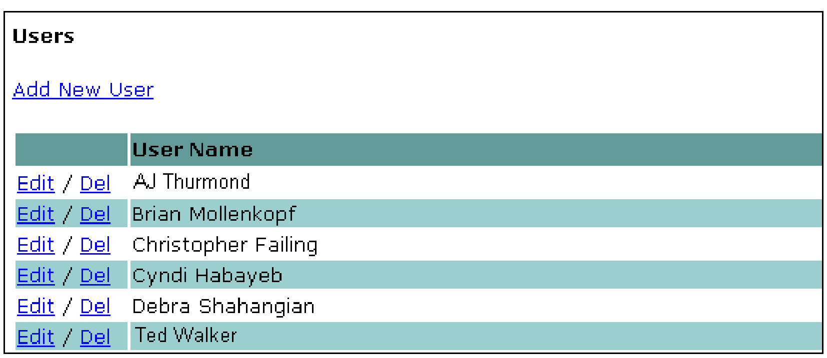
3 Click Save to save the change and exit.

A message is displayed confirming that your password has been reset.

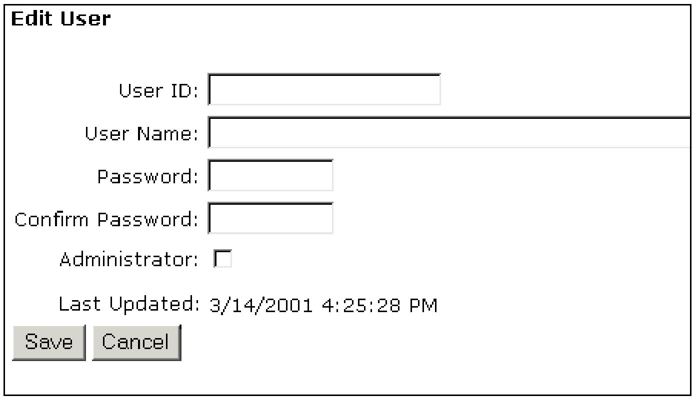
Changing User Information (Administrators Only)

1 Click the Users link in the left frame and then click Edit Users.

The Users list is displayed.



2 Click the Edit link for a user to display the Edit page.



3 Add or change the information.

4 Click the Save button to exit and save.

Adding and Deleting Users (Administrators Only)

- To add a user, click the Add New User link to display a blank Edit page. Fill in the information and click Save.
- To delete a user, click the Delete link. Click OK at the prompt to confirm.

Part Two – For Technical Staff

3. Creating Products and Pages

This section explains how to create products, product pages, and the default page content records for the products. Technical staff are responsible for these tasks when the Publishing Tool is first implemented, and whenever new products need to be added to the system.

Roles and Responsibilities

The process of creating product web sites with the Publishing Tool normally involves a creative team and a technical team.

- The creative team is responsible for *designing* the web sites, especially when creating a new product. This team's skills typically include marketing, copywriting, graphic arts, and information architecture. The team produces a design for each site, which specifies the site structure, number of pages, page layout and general content, graphics, and navigation. The design usually includes HTML pages, graphics files, and a site-diagram.

- The technical team is responsible for *developing* the site, or implementing the design produced by the creative team. The skills of the technical team include Active Server Page (ASP) scripting, VBscript, JavaScript, database knowledge, SQL, advanced HTML, and knowledge of the Publishing Tool. The technical team uses the Publishing Tool and the procedures explained in this section to accomplish their work.

Creating a Product

The purpose of the Publishing Tool is to produce web sites that market insurance products. All of the content in the Publishing system is used to describe products.

In technical terms though, a *product* is the database record that defines the overall site. The first step in creating a site is to add the Product record.

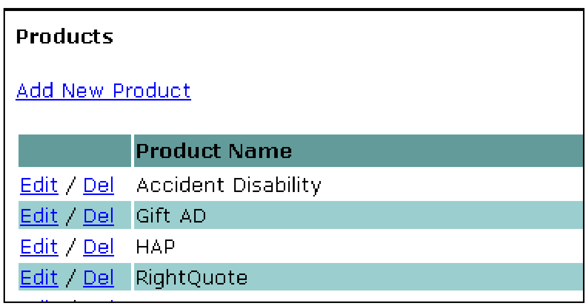
A *content version* is a single instance of a product, which is used to actually generate a site. Each product typically has many content versions. When you add a new product, the Publishing Tool automatically creates the *default content version*.

Adding a New Product

1 Log in to the Publishing Tool and select Site Maintenance.

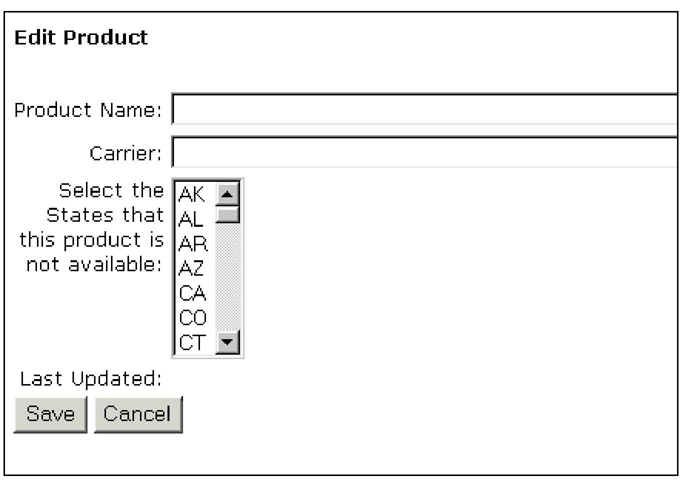
2 In the left frame, click the Products link.

The Products List is displayed.



3 Click the Add New Product link.

The Edit Products form is displayed.



4 Enter the data for the Product:

Product Name	Name of the insurance product. **Examples**: Mortgage AD, HAP.
Carrier	The Insurance carrier for the Product. Optional and used for information only.
States	Select any states where the Product will not be available. Use Control – Click to select multiple States.

5 Click Save.

The Products List is displayed, with the new Product you just added.

Creating Pages

Each product site will contain some number of web pages. When you create *pages* in the Publishing Tool, you are actually defining web page templates. These templates define the basic content and structure of the final published web pages.

Naming Conventions for Pages

These naming conventions are recommended to make it easy to sort and view pages in the Publishing Tool:

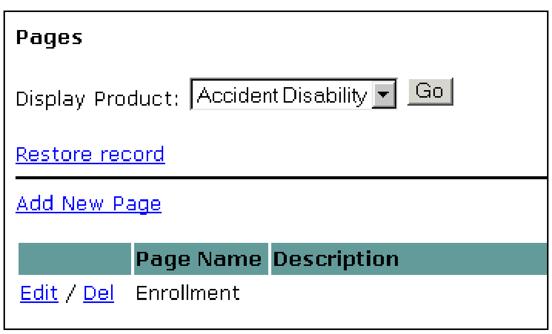
Page Name	**product_pagepurpose.asp** *where* “pagepurpose” describes the function of the page. **Examples**: gad_confirmcoverage.asp gad_checkpayment.asp
Page Description	The description should include the product name followed by the client name (if applicable) and the page purpose. **product – [client] – page purpose** **Examples**: e-AD – ABC Bank – signup e-AD – plan details

Adding a Page

1 Log in to the Publishing Tool and select Site Maintenance.

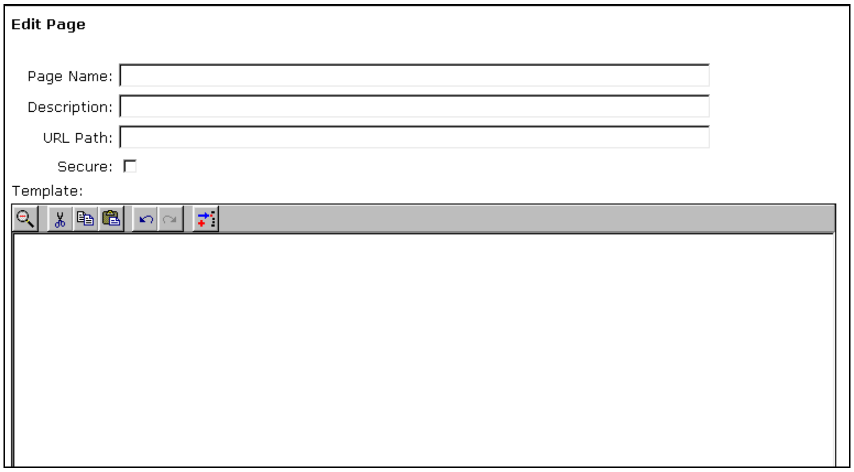
2 In the left frame, click the Pages link.

The Pages List is displayed.



3 Click the Add New Page link.

The Edit Page page is displayed. This page contains the Template area where you insert the default page content records for the Page.



4 Enter data in the fields at the top to describe the Page:

Page Name	File name for the page file, with an asp extension. **Examples**: gad_confirmcoverage.asp gad_checkpayment.asp
Description	Used in the Publishing Tool to describe the page's purpose. **Examples**: e-AD – [ABC Bank] – signup e-AD – plan details
URL Path	Optional, the relative path to a sub-folder of the main site URL. If some product pages are required to be in certain sub-folders, you can enter the sub-folder path here and the path will be created when the site is published. **Example**: If the product site URL is http://www.mybank.com/myproduct and you enter /affiliate in this field, this page will be published to http://www.mybank.com/myproduct/affiliate/
Secure	Check to indicate that the page must be placed in a secured server directory. **Guideline**: Pages that accept or process user input should be secured.

5 In the Template area, add the default page content records to define the page. In many cases, you will want to copy and paste code from other pages in the system.

Note: For more information, see the next section.

6 Click the Save button below the Template area to save the page and exit.

Creating Default Page Content Records

A *page content record* defines a single element of content on a page. A page content record can be a single text string or HTML tag, or it can include many HTML tags, JavaScripts, ASP code segments, and text values.

When you add a page, you also add the page content records for the default content version of the product. You may define new page content records or copy and paste code from the page content records of other products in the system.

Replaceable Tags

The page content records you add for the default content version will often include replaceable tags. *Replaceable Tags* are data elements used by the Publishing Tool. They are equivalent to variables or placeholders. When a site is published, any replaceable tags it contains are replaced by the values defined for them.

See *Using Replaceable Tags* on page 36 for more information.

Naming Conventions for Page Content Records

These naming conventions are recommended to make it easy to sort and view page content records in the Publishing Tool:

Page Name	The name of the specific page, or Any Page if the content can appear on multiple pages.
Description	The description should indicate the purpose of the content, either the content type or (for replaceable tags) the tag name.

Examples

Content Types:	Content Header
Tag name:	MaximumEligibilityAge

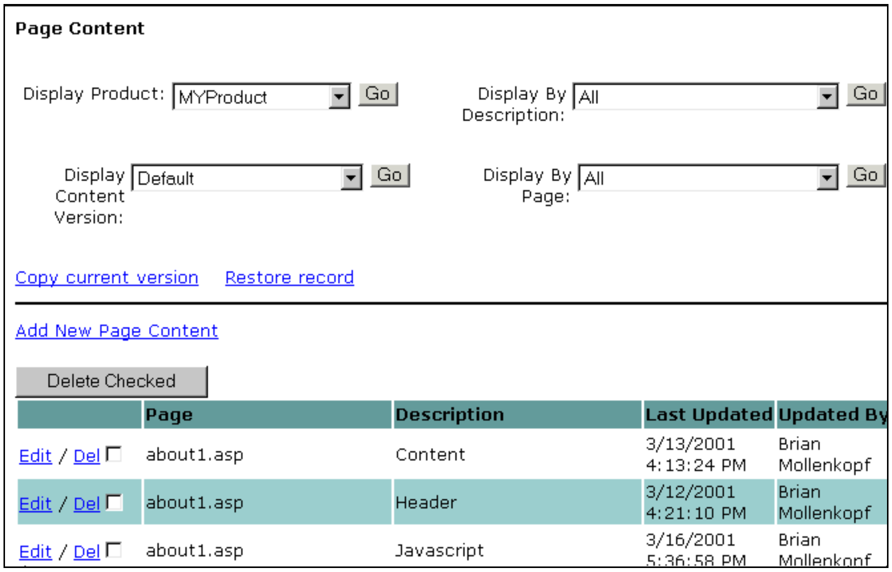
Displaying Page Content Records to Work with

You can use the Page Content List page to view and work with page content records in a number of ways.

1 Log in to the Publishing Tool and select Site Maintenance.

2 In the left frame, click the Page Content link.

The Page Content List is displayed.



3 Use the fields at the top of the page to select the page content records to work with:

- To list only the page content records for a specific Product, choose the Product in the Display Product drop-down list and click Go.

  Note: Do this first or the list will show only default information.

- To list only the page content records for a specific content version of the Product, choose the content version in the Display Content Version drop-down list and click Go.

- To list only the page content records with a specific description, choose an entry in the Display by Description drop-down list and click Go.

- To list only the page content records for a specific Page, choose the Page in the Display by Page drop-down list and click Go.

Adding Default Page Content Records

Follow these instructions to add the default page content records for a new product.

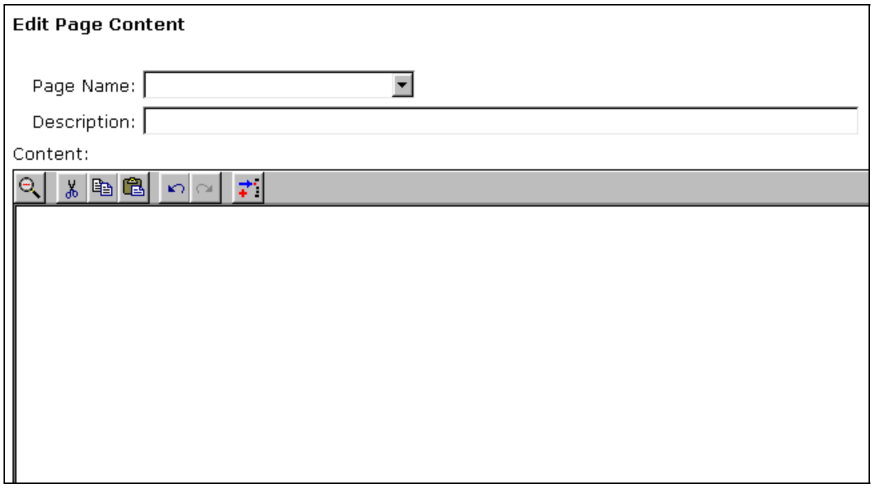
1 On the Page Content List Page, choose the Product in the Display Product drop-down list and click Go.

2 Choose the default content version in the Display Content Version drop-down list and click Go.

The list now shows any records that already exist for the default content version.

3 Click the Add New Page Content link.

The Edit Page Content page is displayed.



4 In the Page Name drop-down list, select the page. Or choose Any Page to make the content available to multiple pages.

5 Enter a Description for the page content record. See the *Naming Conventions for Page Content Records* on page 16.

6 Enter information in the Content area, using any of these methods

Copy and paste from other page content records. This is useful when you have a significant amount of information in other page content records (including those for other products) that you want to duplicate. You'll normally have a large amount of default content in other products that you'll want to duplicate when adding a new product.

Type directly in the Content area. This is useful to add small amounts of information or to make changes in data you've copied.

Insert replaceable tags. Click the Insert Field button to display a list of replaceable tags you can insert into the page. See *Using Replaceable Tags* on page 36 for more information.

7 Click the Save button at the bottom of the Content area to exit and save.

Part Two – For Technical Staff

4. Setting Up Publishing Configurations

This section explains how to set up and maintain the configurations that marketing staff will use to publish web sites.

A *publishing configuration* is a database record that defines the logical paths and ODBC data source for publishing content versions. You will typically need at least two publishing configurations, for a test server and a live server.

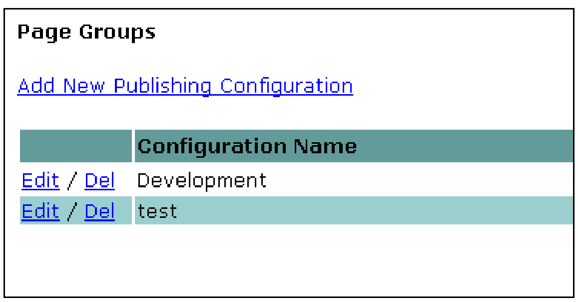
Adding or Editing a Publishing Configuration

Use these steps to add or change a publishing configuration.

1 Log in to the Publishing Tool and select Site Maintenance.

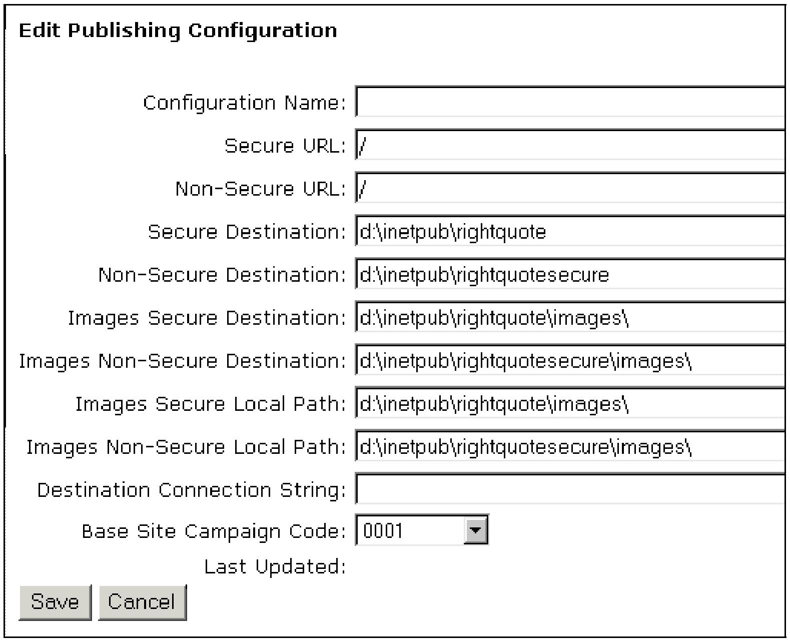
2 In the left frame, click the Publishing Configuration link.

The Publishing Configurations List is displayed. If no configurations have yet been defined, the list is empty.



3 Click the Add New Publishing Configuration link.

The Edit Publishing Configuration page is displayed.



4 Enter data to define the Configuration:

Configuration Name	Name used internally to identify the configuration.
Secure URL	URL of the web server hosting secure pages.
Non-Secure URL	URL of the web server hosting non-secure pages.
Secure Destination	Destination directory for secure asp page files. **Note**: Indicate this and the following paths relative to the development server, entering either a mapped drive or a UNC designation. **Example**: G:\inetpub\wwwroot\MyProductSecure
Non-Secure Destination	Destination directory for non-secure asp page files. **Example**: G:\inetpub\wwwroot\MyProduct
Images Secure Destination	Destination directory for images for secure pages. **Example**: G:\inetpub\wwwroot\MyProductSecure\images
Images Non-Secure Destination	Destination directory for images for non-secure pages. **Example**: G:\inetpub\wwwroot\MyProduct\images

Images Secure Local Path	Source directory on the local server for images for secure pages. **Example**: C:\inetpub\wwwroot\MyProductSecure \images
Images Non-Secure Local Path	Source directory on the local server for images for non secure pages. **Example**: C:\inetpub\wwwroot\MyProduct\images
Destination Connection String	OBDC Data Source Name (DSN) for connecting to the destination server.
Base Site Campaign Code	Optional campaign code for publishing to the web site root directory. **Example**: Normally, a campaign is published to a subdirectory of the web site root, for example www.mybank.com/mycampaign. If you enter campaign code ADY in this field, then campaign ADY will be published to the root of www.mybank.com instead.

5 Click the Save button to exit and save the data.

Part Three – For Marketing Staff

5. Creating Content Versions

Marketing staff use the Publishing Tool to create and publish web sites to market insurance products.

As a marketing person, you create a site by defining a new *content version*. A content version derives its pages and basic content elements from the default content version of the product created by a programmer. You adapt this content to your real-world version by changing only the *page content records* that need to differ from the defaults.

This section explains how to create a content version for a real-world site and how to change the page content records for the new version. It includes instructions plus reference information on naming conventions, HTML coding and style guidelines to use in your page content records.

Important Note: Always Click Save or Cancel

Whenever you edit any record (content version, page content record or campaign), you must save your changes by clicking the Save button. To exit without saving, click the Cancel button.

If you exit the page in any other way, such as clicking the browser Back button or closing the browser, the system will lock the record, and no one else will be able to open it. If this ever happens, open the record again and click Cancel or Save to unlock it.

Creating a Content Version

Your first step in creating a new site is to add the content version for the site.

Content Versions and Default Information

In terms of the Publishing Tool, a *product* represents a web site. A *content version* is a single instance of a product that you create in order to publish a real site. When a programmer first adds a product, the system automatically creates the *default content version* for that product.

A marketing person then creates any number of new content versions to represent actual web sites. These content versions derive or *inherit* their content from the default version. The marketing person only needs to define new content for any information that differs from the default.

Example

A programmer adds a product called Accident Disability. The Publishing Tool automatically creates the default content version, Default.

A marketing person adds a content version called Morris Bank. By definition, this content version inherits all of the content from Default. The marketing person needs to change only the information that differs from Default's information.

Two Levels of Defaults

The Publishing Tool gives you additional flexibility by providing two levels of defaults.

When you create a new content version, you can select the system-generated Default, *or any other* content version as the default. Your new content version will then inherit information from *both* the system-generated Default and the default version you selected.

Example

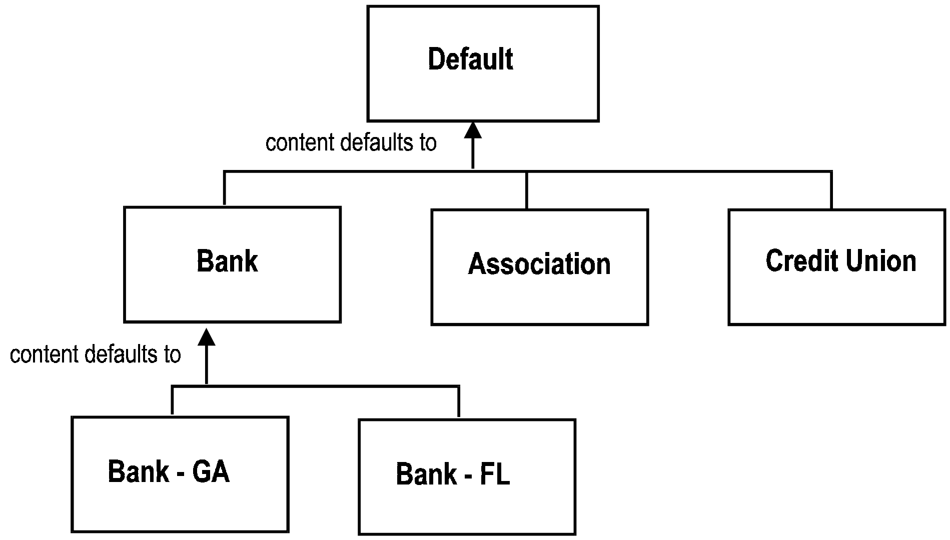
Your company creates different versions of product web sites for Banks, Associations, and Credit Unions. For each insurance product, you create a content version for each of the three markets:

Bank
Association
Credit Union

When necessary, you create separate content versions containing regulatory information specific to individual states, such as:

Bank - GA
Bank - FLA

For these two state-specific content versions, you select Bank as the default content version. As a result, when these two sites are published, they will inherit content from both the Default and Bank content versions.



Example of Content Versions*. The Bank - GA site inherits content from the Bank content version selected as its default. If particular content is not defined in either Bank - GA or Bank, then Bank - GA inherits that content from Default.*

Naming Conventions for Content Versions

These naming conventions are recommended to make it easy to sort and view content versions in the Publishing Tool:

Version Name — The name should indicate purpose of the content, including the institution, state, and test name, if applicable, in that order. The name does not need to include the product name, since this is always shown on the List page with the content versions.

institution – **state name** – **test name**

Examples: ABC Bank – GA – Email Test
Central Credit Union – TX

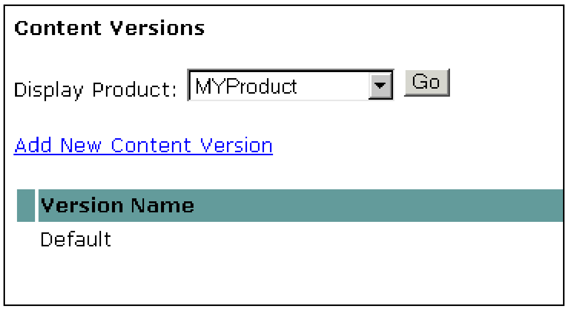
Adding a Content Version

Follow these steps to add a new content version for a product.

1 Log in to the Publishing Tool and select Site Maintenance.

2 In the left frame, click the Content Versions link.

The Contents Versions List page is displayed.

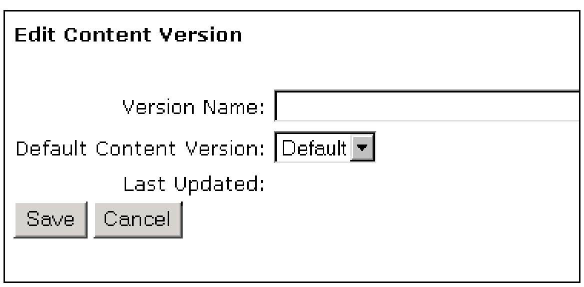


3 In the Display Product drop-down list, choose the product you want to add a content version for, then click Go.

The content versions for the selected product are shown in the list. The list will always show at least the Default content version generated by the system.

4 Click the Add New Content Version link.

The Edit Content Version page is displayed.



5 Enter a name in the Version Name field. See the *Naming Conventions for Content Versions* on page 25.

6 In the Default Content Version drop-down list, select the content version you want to use as the default.

7 Click Save.

The Contents Versions List page is displayed, with the new content version you just added.

Creating Page Content Records

Use the instructions in this section whenever you need to add or edit information for a content version.

About Page Content Records

A *page content record* defines a single element of content on a page. A page content record can be a single text string or HTML tag, or it can include many HTML tags, text values, and segments of program code. A page content record can be associated with a specific product page, or with Any Page (in which case it is available for use on all pages in the site).

When you define the page content records for a content version, you only need to add or change information that differs from the (one or two) default content versions. The site will inherit all other content from the defaults.

Naming Conventions for Page Content Records

These naming conventions are recommended to make it easy to sort and view page content records in the Publishing Tool:

Page Name	The name of the specific page, or Any Page if the content can appear on multiple pages.
Description	The description should indicate the purpose of the content, either the content type or (for replaceable tags) the tag name.

Examples

Content Types:	Content Header
Tag name:	MaximumEligibilityAge

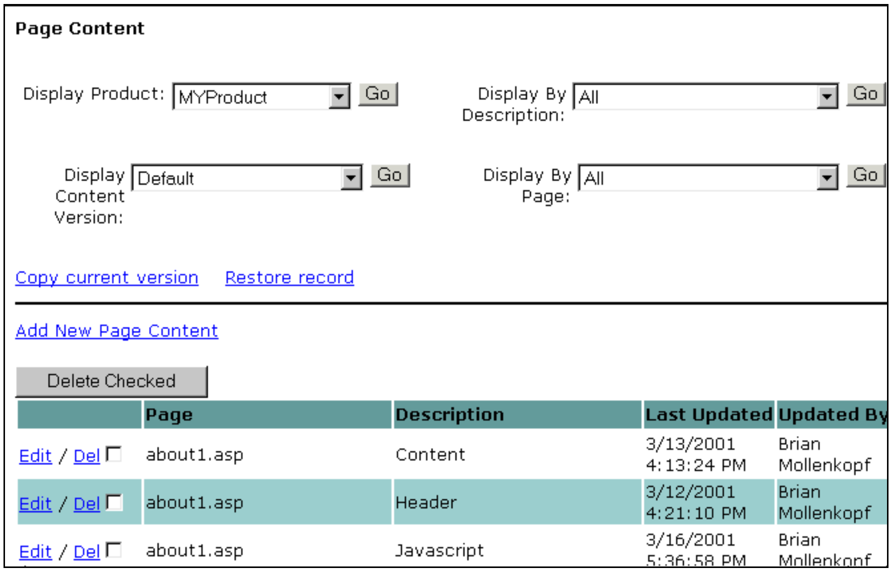
Displaying Page Content Records

You can use the Page Content List page to view page content records in a number of ways.

1 Log in to the Publishing Tool and select Site Maintenance.

2 In the left frame, click the Page Content link.

The Page Content List is displayed.



Note: As indicated by the Description field, many of the content records define JavaScript or program code. In most cases, you'll only work with records with a Description of "Content."

3 Use the fields at the top of the page to select page content records to work with:

- To list only the page content records for a specific Product, choose the Product in the Display Product drop-down list and click Go.

  Note: Do this first or the list will show only default information.

- To list only the page content records for a specific content version of the Product, choose the content version in the Display Content Version drop-down list and click Go.

- To list only the page content records with a specific description, choose an entry in the Display by Description drop-down list and click Go.

- To list only the page content records for a specific Page, choose the Page in the Display by Page drop-down list and click Go.

Adding New Page Content Records

One effective way to build a site is to create new page content records for your content version. You only need to add page content records for any information that differs from the defaults.

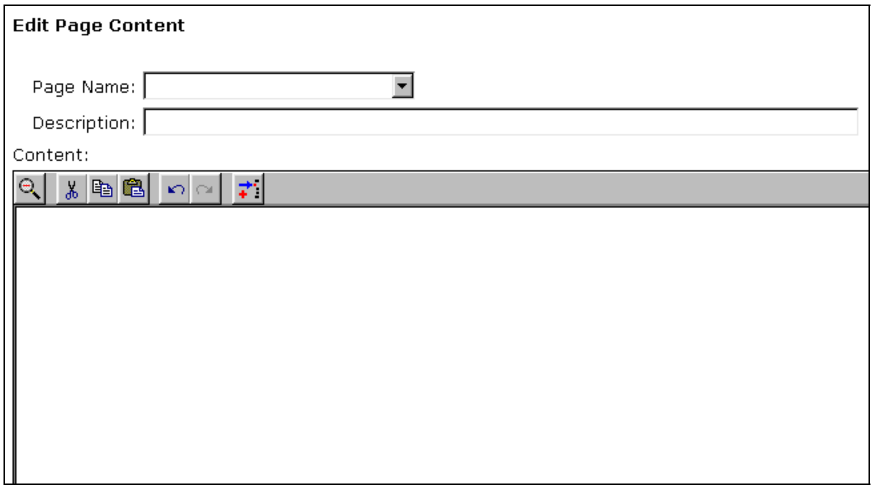
1 On the Page Content List Page, choose the Product in the Display Product drop-down list and click Go.

2 Choose the content version you need to add records to in the Display Content Version drop-down list and click Go.

The list now shows any records that already exist for your content version.

3 Click the Add New Page Content link.

The Edit Page Content page is displayed.



4 In the Page Name drop-down list, select the page where you want the new content to appear. Or choose Any Page to make the content available to multiple pages.

5 Enter a Description for the page content record. See the *Naming Conventions for Page Content Records* on page 27.

6 See *Editing Page Content* on page 30 for further instructions.

Copying Page Content Records from a Different Version

Another useful approach is to copy all of the page content records from another version to your new version, then make changes.

Examples: If you were setting up content versions for different states, you might want to copy the records from one state to another, then change the state-specific information. Or, you might want to copy all of the page content records from a default content version and then make changes where necessary.

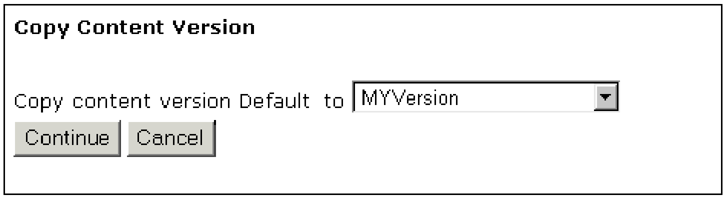
Caution: If you copy all records from a default version, make sure you delete all of the records where you are not making changes. Otherwise, changes made later to the default version will *not* be inherited by your new content version. Also, copying large numbers of content records can overload the web server. For these reasons, this method should be used with care.

1 On the Page Content List Page, choose the Product in the Display Product drop-down list and click Go.

2 Choose the content version you want to copy from in the Display Content Version drop-down list and click Go.

3 Click the Copy Current Version link.

The Copy Current Version page is displayed.



4 Select the version you want to copy to in the drop-down list. Click Continue.

The Publishing Tool displays a message for you to confirm the copy.

Note: Any page content records in your version that have the same name as the ones you are copying will be overwritten.

5 Click Continue.

The records are copied and the Page Content List page is displayed.

6 To see the copied page content records, select the content version that you copied to in the Display Content Version drop-down list and click Go.

Editing Page Content

Regardless of how you add page content records, you'll use the Content area on the Edit Page Content page to define or change the actual page content. You can do this in a number of ways:

Copy and paste content from other pages. This method is useful when you have a significant amount of information in another page content record that you want to duplicate. (See the *Example* on the next page.)

- Use the Copy button to copy selected text and tags from a page content record to the clipboard.
- Use the Paste button to paste from the clipboard to your page content record.

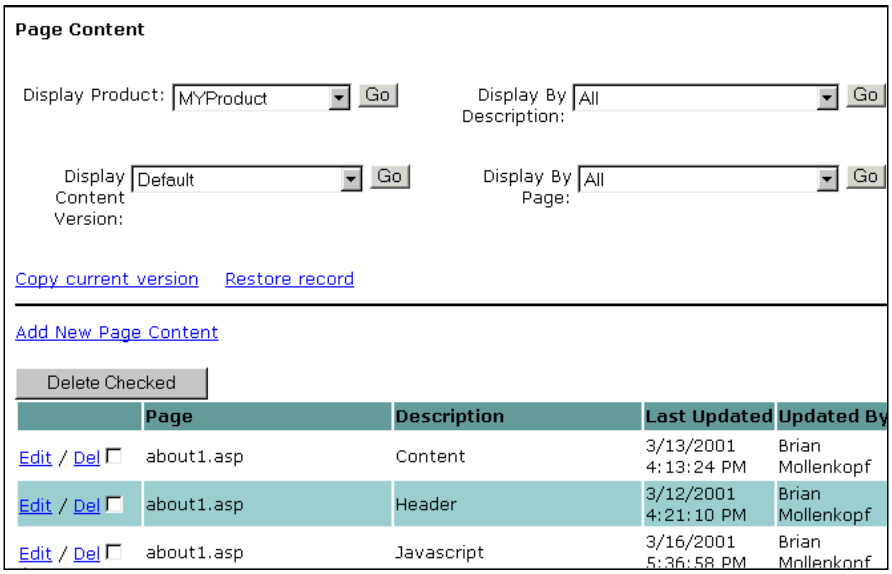
Type directly in the Content area. You can type text and HTML tags directly into the Content area. This is useful to add small amounts of information or to make changes in data you've copied. See *HTML Codes* on page 38 for information on commonly-used HTML tags.

Insert replaceable tags. Click the Insert Field button to display a list of *replaceable tags* you can insert into the page. See *Using Replaceable Tags* on page 36 for more information.

Example: Copying and Pasting Content

In this example, a marketing person has created a new content version for the e-AD product and named it ABC Bank. She needs to create the page content record that supplies the body content for the plan details page (gad_plandetail.asp) to make it bank-specific. She realizes she can easily copy the content from the page content record of the default, and then make appropriate changes. She follows these steps:

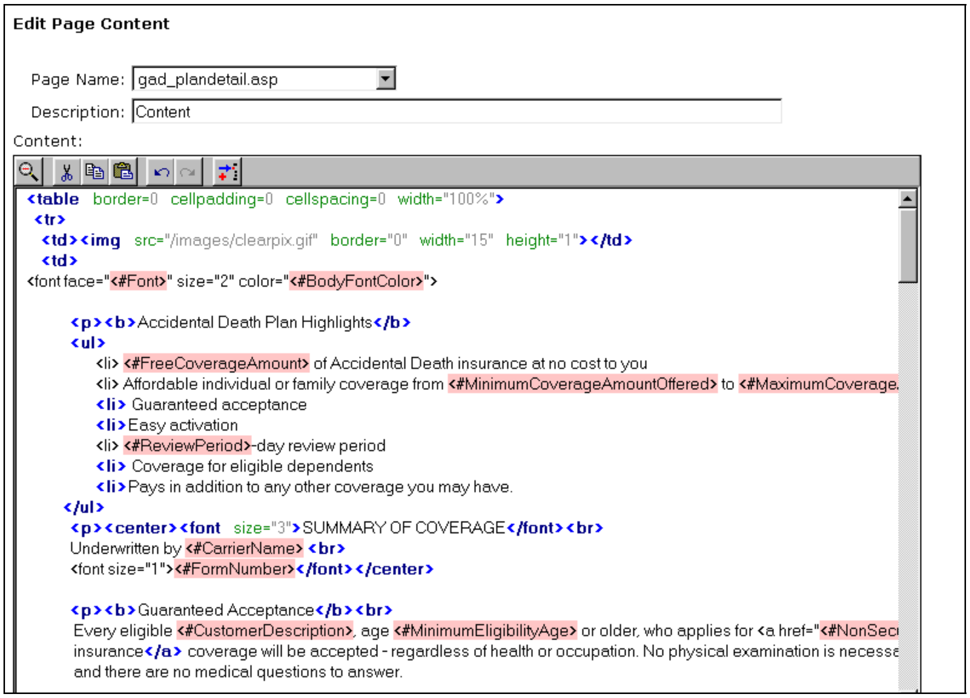
1 In the Publishing Tool left frame, click the Page Content link to display the Page Content List page:

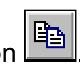


2 Select e-AD in the Display Product field and click Go.

3 If the default records are not already displayed, choose Default in the Display Content Version field and click Go.

4 Find the page content record for the plan details page (gad_plandetail.asp) that contains the body content. (Description = Content). Click the Edit link to display the Edit Page Content page.



5 Select all of the information in the Content area. Click the Copy button .

6 At the bottom of the Content area click the Cancel button to close the page.

7 On the Page Content List page, select e-AD in the Display Product field and click Go.

8 Select ABC Bank in the Display Content Version field and click Go.

The list now shows only the page content records for the ABC Bank content version.

9 Click the Add New Page Content link.

A blank Edit Page Content page is displayed.

10 In the page name field, select the plan details page (ad_plandetail.asp). Type “Content” in the Description field.

11 Click the Paste button on the tool bar .

The content copied from the gad_plandetail.asp Content record is copied in.

12 Edit the information in the Content area to match this content version.

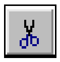
13 Click Save.

The new page content record is added, with information appropriate to the e-AD product and ABC Bank content version.

Toolbar Buttons

The Content area includes a tool bar with these buttons to help you edit page content records.

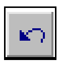
Search. Click to display a search dialog box to help you to quickly find specific words or characters on the page.



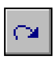
Cut. Removes the selected text from the Content area and place it on the clipboard.

Copy. Copies the selected text to the clipboard.

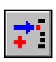
Paste. Pastes information from the clipboard into the Content area.



Undo. Cancels the last editing change. You can undo several editing steps.



Redo. Cancels Undo and repeats the editing change. You can redo several steps.



Insert Field. Opens a dialog box listing all of the available replaceable tags. Select a tag and click Insert to place the tag into the page content record. See *Using Replaceable Tags* on page 36 for more information.

> ***Tip***: You can also right-click in the Content area to turn on word-wrapping.

Important: Save Your Changes

Whenever you change a page content record (or any record), you must save the changes by clicking the Save button below the Content area. To exit without saving, click the Cancel button.

If you exit the page in any other way, such as clicking the browser Back button or closing the browser, the system will lock the record and no one else will be able to open it. If this happens, open the record again and click Save or Cancel to unlock it.

Restoring Page Content Records

At times, you may need to revert to a previously saved version of a page content record. The Publishing Tool stores all changed versions and lets you restore any one you choose.

Caution: This procedure erases the current page content record and replaces it with the stored version.

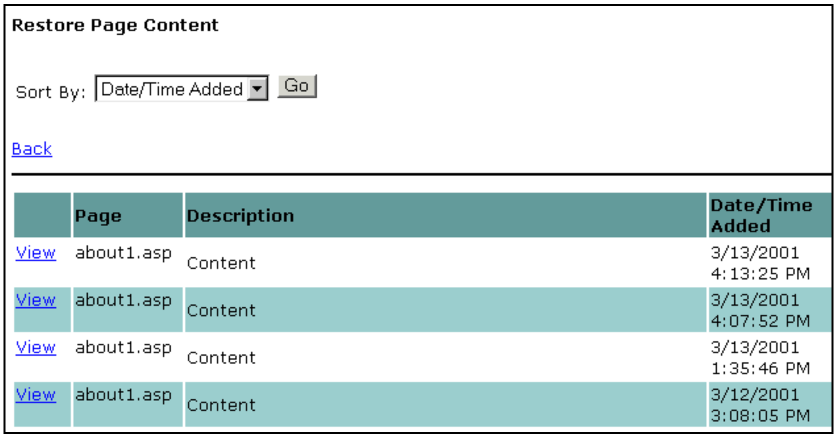
1. On the Page Content List Page, choose the Product in the Display Product drop-down list and click Go.
2. In the Display Content Version drop-down list, choose the content version containing the page content record you want to restore and click Go.

   The page content records for that version are displayed.

3 Recommended: use the Display by Description and/or Display by Page fields to reduce the number of page content records listed.

4 Click the Restore Record link.

The Restore Page Content page is displayed. This page lists all of the prior versions of the page content records that were listed on the previous page.


Restore Page Content

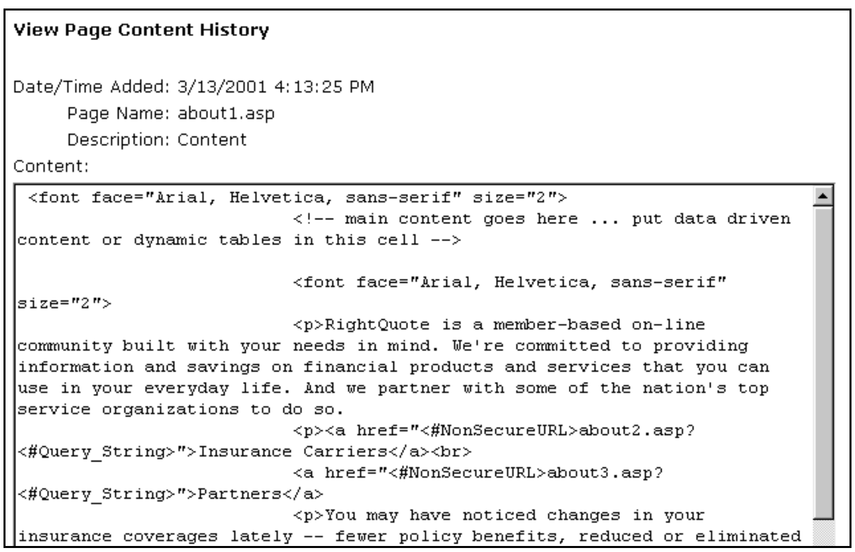
Sort By: Date/Time Added Go

Back

	Page	Description	Date/Time Added
View	about1.asp	Content	3/13/2001 4:13:25 PM
View	about1.asp	Content	3/13/2001 4:07:52 PM
View	about1.asp	Content	3/13/2001 1:35:46 PM
View	about1.asp	Content	3/12/2001 3:08:05 PM

5 Click the View link to see the content of any stored version. (In most cases, you'll want to view and restore the most recent version.)

The View Page Content History page is displayed. This page shows the content for the stored version you selected.


View Page Content History

Date/Time Added: 3/13/2001 4:13:25 PM
Page Name: about1.asp
Description: Content
Content:

```
<font face="Arial, Helvetica, sans-serif" size="2">
                          <!-- main content goes here ... put data driven
content or dynamic tables in this cell -->

                          <font face="Arial, Helvetica, sans-serif"
size="2">
                          <p>RightQuote is a member-based on-line
community built with your needs in mind. We're committed to providing
information and savings on financial products and services that you can
use in your everyday life. And we partner with some of the nation's top
service organizations to do so.
                          <p><a href="<#NonSecureURL>about2.asp?
<#Query_String>">Insurance Carriers</a><br>
                          <a href="<#NonSecureURL>about3.asp?
<#Query_String>">Partners</a>
                          <p>You may have noticed changes in your
insurance coverages lately -- fewer policy benefits, reduced or eliminated
```

6 At the bottom of the Content area, click the Restore button to restore this version, or Cancel to return to the Restore Page Content page.

Deleting Page Content Records

You may need to delete page content records. For example, you might replace a record with a new record. Or you may have copied all page content records from a default content version, in which case you need to delete the records that don't have information different from the default.

1 On the Page Content List Page, click the Del link for the record you want to delete.

  You are prompted to confirm the deletion.

2 Click OK to confirm.

Note: If you need to restore a deleted page content record, do the following:

1 On the Page Content List Page, choose All in the Display by Description field and click Go.

  All page content records for the product are displayed, including deleted ones.

2 Find the deleted record in the list and click the Restore Record link.

3 Follow the normal steps to restore the record.

Using Replaceable Tags

Replaceable tags are predefined content records that you can insert into other page content records. When you publish a site, the replaceable tags are replaced by the content defined for them on a system-wide basis. The use of replaceable helps standardize certain data for all products or product pages, and makes it easy to make global changes.

Guideline: Always use a replaceable tag if one is available for the information you are entering.

Example

A product may include a page content record, available to Any Page, with a Description of Font. If you look at the Content area for the Font page content record, you see the following:

Arial, Helvetica, sans-serif

The Font page content record is used as a replaceable tag. Other page content records for this product can include a string like the following:

<Font face="<#Font">" size="2">

When the site is published, <#Font"> will be replaced by Arial, Helvetica, sans-serif.

This makes it possible to easily change the fonts used in the entire site by just changing the one replaceable tag.

Delivered Replaceable Tags

For a listing of replaceable tags delivered with the Publishing Tool, see Appendix B.

Defining a Replaceable Tag

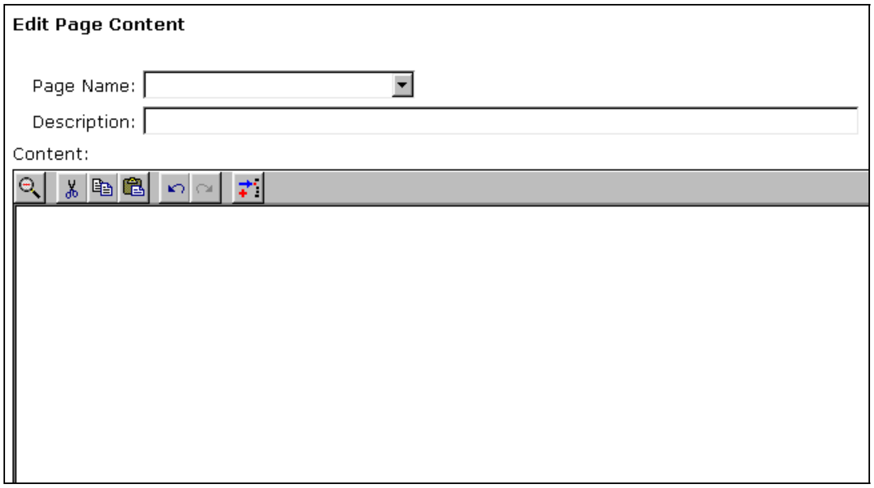
Either technical or marketing staff members may have occasion to add replaceable tags to the system. Follow these steps to define a replaceable tag for content that you want to be replaceable on the site.

1 On the Page Content List page, choose the Product in the Display Product drop-down list and click Go.

2 Choose the Default content version in the Display Content Version drop-down list and click Go.

3 Click the Add New Page Content link.

The Edit Page Content page is displayed.



4 In the Page Name drop-down list, choose Any Page to make the content available to all pages.

5 In the Description field, enter the name you want to use for the tag (without the # or < >).

Example: Font

6 In the Content area, type the content that will replace the tag on published pages.

Example: Arial, Helvetica, sans-serif

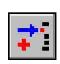
7 Click the Save button to save and exit.

The content record is saved and is now available to be inserted as a replaceable tag in other page content records.

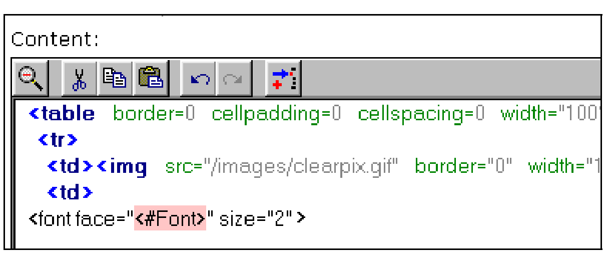
Inserting a Replaceable Tag

Follow these steps to insert a replaceable tag into a page content record:

1 On the Edit Page Content page, in the Content area, place the cursor at the position where you want to insert the tag.

2 Click the Insert Field button  and select the tag from the list.

The tag is placed at the cursor position. Replaceable tags are indicated by a bracket-pound sign (<# > and pink shading.



Note: You can also type the tag in the Content area, such as <#Font>.

HTML Quick Reference and Style Guide

This section provides reference information on HTML codes and page style guidelines.

HTML Codes

Following is a quick reference for commonly-used HTML codes that you may find helpful in creating page content records.

Note: Attributes appear inside their associated opening tag, for example:

<BODY bgcolor="#FFFFFF" text="#000000">

This example specifies that the body background color is white (HTML code #FFFFFF) and the text color is black (HTML code #000000).

Tag	Attributes	Description
<HTML></HTML>		Encloses the entire HTML document.
<HEAD></HEAD>		Contains information about the entire page, such as the <TITLE> tag and JavaScripts or other program code.
<TITLE></TITLE>		The name that appears in the browser title bar.
<BODY></BODY>	bgcolor=, text=, background=	Contains all page items seen in the browser.
<!-- -->		Comment Tag. May be used in the BODY or HEAD section. Information inside this tag will not appear in the browser.
<H1> <H1> through <H6></H6>		Heading levels one through six. The higher the number, the smaller the text size.
<P></P>		Paragraph. Each new paragraph creates a double space above.
 		Line break. Creates a single space.
<HR>		Horizontal rule.
<CENTER></CENTER>		Centers all information within the tag.
<DIV></DIV>	align=	Division tag, can be used to specify alignment.
<NOBR></NOBR>		No break. Prevents text from wrapping to the next line. (Use sparingly.)
<BLOCKQUOTE> </BLOCKQUOTE>		Blockquote. Indents text on both the right and left.
<FONT></FONT>	size=, color=, face=	Defines typeface formatting.
<PRE></PRE>		Preformatted text. Creates a typewriter-text look.
<EM></EM>		Emphasize (italic).
<BIG></BIG>		Increases type size.

Tag	Attributes	Description
<SMALL></SMALL>		Decreases type size
<KBD></KBD>		Keyboard type. Creates a typewriter-text look.
<B></B>		Boldface.
<I></I>		Italic.
<S></S>		Strikethrough.
<U></U>		Underline.
<TT></TT>		Typewriter style.
		Subscript text.
		Superscript text.
<ADDRESS> </ADDRESS>		Used for page footers.
<UL></UL>	type=”circle” type=”square” type=”disc”	Unordered list. Creates a bulleted list when used with the <LI> tag.
<OL></OL>	type=”1” type=”i” type=”I” type=”A” type=”a” start=”5”	Ordered list. Creates a numbered or alphabetized list when used with the <LI> tag. (Use the start attribute to start at a value other than 1.)
<LI></LI>		List item. Used to start each item in an ordered or unordered list.
<DL></DL>		Definition list. Used for spacing.
<DT></DT>		Definition term. Used with each item in a Definition List.
<DD></DD>		Definition defined. Used with Definition List.
<IMG>	src=”xyz.gif” alt=”alternate text” align=”left, center, etc.”	Image. Inserts the image defined by the src tag.
<A>	name=”name of anchor”	Named anchor. Creates an anchor for a hyperlink within the current page.
<A></A>	href=”destination”	Anchor link. The href defines the destination of the link, which can be another file or an internal anchor defined by the <A> tag. See the *Hyperlink Examples*, below.
<STYLE></STYLE>		Inline, embedded, or external (cascading) style sheet.

Hyperlink Examples

Description	Example
Anchor in a page (at the top)	<A name=”top”>
Link to an anchor in a page	<A href=”#top”>Back to top.</A>
Link to a page in your site	<A href=”#index.asp”>Home page.</A>
Mailto, for e-mail links	<A href=”mailto:emailaddress”>Comments.</A>
Link to another site	<A href=”http://www.aol.com”>AOL</A>
Image used as a link	<A href=”destination”><img src=”picture.gif”></A>

Codes for Common Special Characters

Description	Example
Non-breaking space	
Cent sign	&cent
Broken vertical bar	&brvbar
Copyright symbol	&copy
Registered trademark	&reg
Degree symbol	&deg
Plus/minus	&plusmn
Fraction, one-fourth	&frac14
Fraction, one-half	&frac12
Fraction, three-fourths	&frac34

Style Guide for Body Copy

All body copy should be <font face="Arial, Helvetica, sans-serif" >. The following samples show the attributes to apply to this font base for the different page elements.

Description	Code	Approximate Sample
Body Copy	size="2"	Are you wondering if…
Emphasized Body Copy	size="2" <b>	**General Questions**
SubHeaders (within content)	<h3>	**General Questions**
De-emphasized Copy	size="1"	*National Safety Council….

Color Palette Used

These are the recommended colors to use, with their HTML (Binhex) values.

Description	Binhex
Dark Green	#669999
Light Green	#99CCCC
Gold	#FFCC33
Light Yellow	#FFFFCC
Red	#CC0000

Part Three – For Marketing Staff

6. Creating Campaigns and Publishing Sites

A *campaign* is a collection of information about the marketing campaign associated with a web site. Marketing staff use campaigns to specify how a site will be published and then to track responses to the site.

This section explains how to add and edit campaigns and how to publish sites.

Working with Campaigns

Use the instructions in this section whenever you need to add or edit information for a campaign.

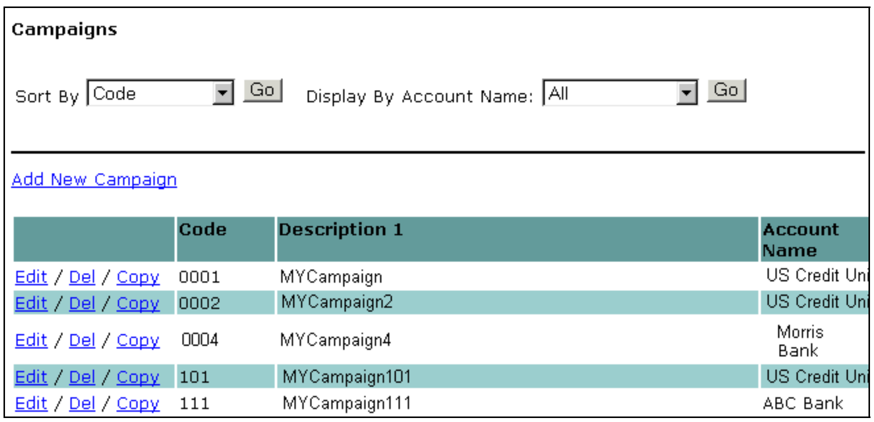
Displaying Campaigns

You use the Campaigns List page to view and display campaigns.

1 Log in to the Publishing Tool and select Site Maintenance.

2 In the left frame, click the Campaigns link.

The Campaigns List page is displayed.



3 Use the fields at the top of the page to select campaigns to display:

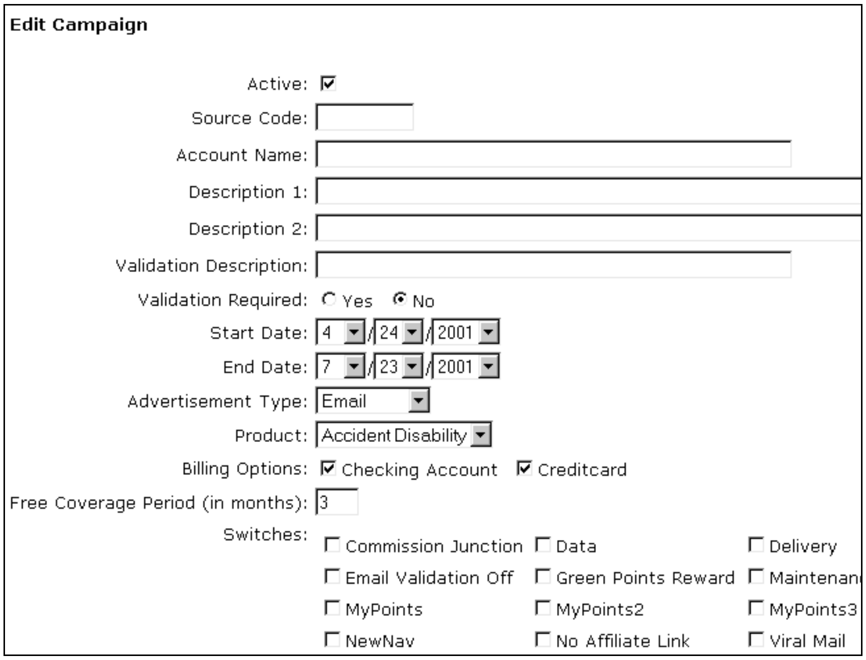
- To sort the campaigns differently, select a field in the Sort By list and click Go.
- To list only the campaigns for a specific Account, choose the account in the Display by Account Name drop-down list and click Go.

Adding a New Campaign

Follow these steps to add a new campaign.

1 On the Campaigns List page, click the Add New Campaign link.

The Edit Campaign page is displayed, containing blank fields and default data.



2 Enter the information to define the campaign. See the *Campaign Data Descriptions* on page 46 for information.

3 Click the Save button to save the campaign and exit.

Adding a Campaign by Copying

A quick way to add a campaign is often to copy from a similar campaign that's already been created. Follow these steps.

1 On the Campaigns List page, click the Copy link for the campaign you want to copy.

The Edit Campaign page is displayed, containing the data for the selected campaign.

2 Enter a new Source Code. (The Source Code identifies the campaign in the system and must be unique.)

3 Change the other information for the campaign as necessary. See the *Campaign Data Descriptions* on page 46 for information.

4 Click the Save button to save the campaign and exit.

Campaign Data Descriptions

This table describes all of the information on the Edit Campaign page.

Active	Indicates that the Campaign is active in the system. Only active campaigns can be published. When you publish All Campaigns, all active ones are published. Clear this checkbox to avoid publishing a campaign that is inactive.
Source Code	Unique code identifying the campaign. Up to nine alphanumeric characters. You can use the Source Code to sort campaigns on the Campaigns List page.
Account Name	Name of the client offering the product. You can use the Account Name to sort campaigns on the Campaigns List page.
Description 1 and 2	Use these fields to describe the campaign in detail. Include the account/client name, product, campaign name, description, test name, and date. You can use the Description 1 field to sort campaigns on the Campaigns List page.
Validation Description	Text describing a validation question, if one is used for this campaign. **Examples**: “What are the last four digits of Social Security Number?” “What are last 4-5 digits of account number?”
Validation Required?	Indicates if a validation response is required for a visitor to enter the campaign site. If Yes, the site will display the validation page when the site is loaded. If no, the validation page will be skipped.
Start Date and End Date	The start and end dates for the campaign. Informational only.
Advertisement Type	Informational. The marketing channel used. **Note**: You can add, change, or delete advertisement types. See page 48.
Product	Product, as defined in the Publishing Tool, associated with this Campaign. **Note**: States indicated as not valid for this Product can be selected for the Campaign. A visitor to the web site who tries to select an invalid state will receive a message stating that the product is not available for that state.
Billing Options	Supported customer billing options: checking account or credit card.

Free Coverage Period in Months	Indicates the length of the free coverage period, if free coverage is offered as an incentive.
Switches	Available campaign switches as defined in the Publishing Tool. Click to select any switches you want to use in the campaign.
Default Campaign Version	Click the Select button if you want to choose a content version as the default one for the campaign. A default campaign version is located in a root folder and thus has a shorter URL than other versions. **Example**: You publish Campaign code 909, for a product that has three content versions: State1, State 2, and State 3. The Publishing Tool creates three URLs under the base URL of the server: www.mybank.com/909_State1 www.mybank.com/909_State2 www.mybank.com/909_State3 If you select State1 in the Default Campaign Version field, then URL /909_State1 is not created. Instead, the base URL /909 displays the site for the State1 content version.
Marketing Details	Use this table to define details for each state where the campaign will be used.
State Availability	Check the states that are active for the campaign.
Content Version	For each active state, click the Select button to select the content version for that state. This button opens a separate browser window for you to select the content version.
Voluntary Policy #	Voluntary policy number associated with the state.
Privacy Policy Attachment	File name of an Adobe Acrobat PDF file describing the privacy policy in force for the selected state. This button opens a separate browser window for you to select the PDF file. If this field is used, then the selected PDF file is attached to the confirming e-mail sent to the customer.

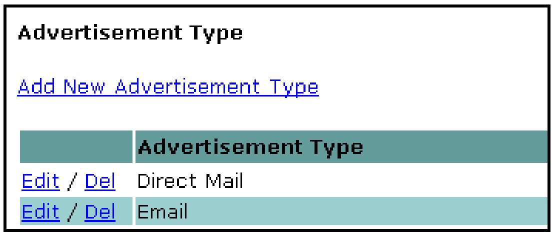
Working with Advertisement Types

You can add, change, or delete the values that appear in the Advertisement Types field. Use these instructions when you need to modify the names of marketing channels for campaigns.

Adding an Advertisement Type

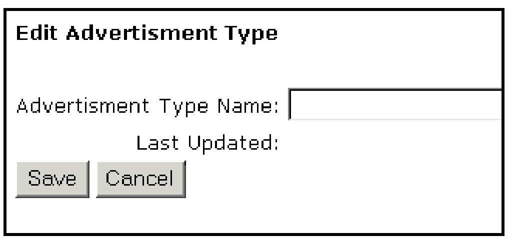
1 In the left frame, click the Advertisement Types link.

The Advertisement Types List page is displayed.



2 Click the Add New Advertisement Type link.

The Edit Advertisement Type page is displayed.



3 Enter the name for the new Advertisement Type and click Save.

The Advertisement Types List page is displayed, with the new type you added.

Editing and Deleting Advertisement Types

To edit an advertisement type, click the Edit link on the Advertisement Types List page. Change the information and click Save.

To delete an advertisement type, click the Delete link. Click OK at the prompt to confirm.

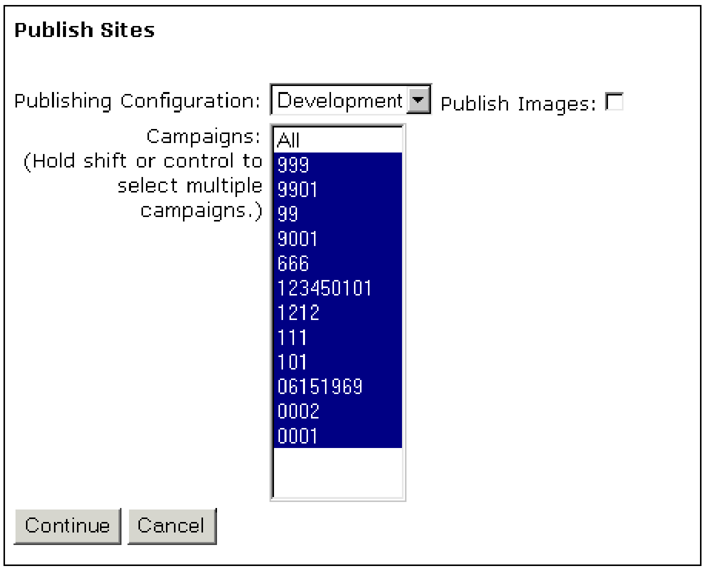
Publishing a Site

After defining an appropriate campaign, you publish the site. Normally, you will want to publish first to a test or development server, review all pages and make any corrections, then publish to the live web server.

Publishing a Site

1 In the left frame, click the Publish Sites link.

The Publish Sites page is displayed.



2 Select options on the page:

Publishing Configuration	Defines the server that the site will be published to. Choose a configuration from the drop-down list.
Publish Images	Indicates whether graphics files need to be published as well as other files. Check this only if any new or changed graphics files have been added.
Campaigns	Select the campaign(s) to publish. The default is to republish all campaigns. ***Tip***: Use Ctrl-Click to select multiple campaigns or Shift-Click to select a range.

3 Click Continue.

The Publishing Tool displays a message indicating that the selected campaign(s) were published and lists the URLs where you can view the results.

Note: Two URLs are published for each campaign/content version, one for a solicited campaign and one for unsolicited.

Quick Publishing

After you've published once, the Quick Publishing option becomes available. This link lets you republish the same campaign(s) using the same configuration without choosing settings on the Publish Sites page.

In the left frame, click the Quick Publish... link for the campaign you want to publish.

The Publishing Tool displays a message indicating that the selected campaign(s) were published and lists the URLs where you can view the results.

Appendix A

Naming Conventions Summary

The recommended naming conventions are listed throughout this guide. They are collected here for convenience.

Naming Conventions for Pages

These naming conventions are recommended to make it easy to sort and view pages in the Publishing Tool:

Page Name	**product_pagepurpose.asp** *where* "pagepurpose" describes the function of the page. **Examples**: gad_confirmcoverage.asp gad_checkpayment.asp
Page Description	The description should include the product name followed by the client name (if applicable) and the page purpose. **product – [client] – page purpose** **Examples**: e-AD – ABC Bank – signup e-AD – plan details

Naming Conventions for Content Versions

These naming conventions are recommended to make it easy to sort and view content versions in the Publishing Tool:

Version Name	The name should indicate purpose of the content, including the institution, state, and test name, if applicable, in that order. The name does not need to include the product name, since this is always shown on the List page with the content versions. **institution** – **state name** – **test name** **Examples**: ABC Bank – GA – Email Test Central Credit Union – TX

Naming Conventions for Page Content Records

These naming conventions are recommended to make it easy to sort and view page content records in the Publishing Tool:

Page Name	The name of the specific page, or Any Page if the content can appear on multiple pages.
Description	The description should indicate the purpose of the content, either the content type or (for replaceable tags) the tag name.

Examples

Content Types:	Content
	Header
Tag name:	MaximumEligibilityAge

Appendix B

Delivered Replaceable Tags

This appendix lists all of the replaceable tags delivered with the current version of the Publishing Tool. For information on using replaceable tags, see page 36.

e-AD Product

Replaceable tag description	Tag name (used in site)	Example	Appears on pages
Font	**<#font>**	Arial, Helvetica	all
Logo/header	**<#Logo>**	[ABC Bank logo]	all
Background color	**<#BackgroundColor>**	#FFFFFF	all
Body font color	**<#BodyFontColor>**	#000000	all
Header font color	**<#HeaderFontColor>**	#000000	all
Input form background color	**<#FormBackgroundColor>**	#FFFFCC	all
Left navigation	**<#LeftNavigation>**		all
Bottom navigation	**<#BottomNavigation>**		all
Right navigation	**<#RightNavigation>**		all
Free coverage amount	**<#FreeCoverageAmount>**	$10,000	all
Carrier name	**<#CarrierName>**	Monumental Life Insurance Company	all
Customer description	**<#CustomerDescription>**	customer	all
Minimum coverage amount offered	**<#MinimumCoverageAmountOffered>**	$25,000	all
Maximum coverage amount offered	**<#MaximumCoverageAmountOffered>**	$250,000	all
Coverage cost increment	**<#CoverageCostIncrement>**	$10,000	all
Cost per increment	**<#CostPerCoverageIncrement>**	$1.06	all
Client/partner name	**<#Client/PartnerName>**	ABC Bank	all
Minimum eligibility age	**<#MinimumEligibilityAge>**	18	Plan Details
Maximum eligibility age	**<#MaximumEligibilityAge>**	70	Plan Details
Benefit decrease amount 1	**<#50%BenefitDecreaseAmount>**	50% at age 70	Plan Details
Benefit decrease amount 2	**<#25%BenefitDecreaseAmount>**	25% at age 75	Plan Details
Institution description	**<#InstitutionDescription>**	bank	Plan Details
Benefit decrease age	**<#BenefitDecreaseAge>**	70	Plan Details
Plan Administrator name	**<#PlanAdministrator>**	Plan Administrator	Plan Details
Customer service 800-number	**<#CustomerServicePhone>**	1-888-367-2390	all
Customer service email address	**<#CustomerServiceEmailAddress>**	customerservice@driasi.com	all
Customer service days open	**<#CustomerServiceDaysOpen>**	Monday - Friday	all
Customer service open time	**<#CustomerServiceOpenTime>**	9 a.m.	all
Customer service close time	**<#CustomerServiceCloseTime>**	6 p.m.	all
Time zone	**<#CustomerServiceTimeZone>**	Eastern Time	all
Review period	**<#ReviewPeriod>**	30	Plan Details

Replaceable tag description	Tag name (used in site)	Example	Appears on pages
Spouse benefit - with children	**<#SpouseBenefit%-WithChildren>**	50%	Plan Details
Spouse benefit - no children	**<#SpouseBenefit%-NoChildren>**	60%	Plan Details
Child benefit - with spouse	**<#ChildBenefit%-WithSpouse>**	10%	Plan Details
Child benefit - no spouse	**<#ChildBenefit%-NoSpouse>**	20%	Plan Details
Form #	**<#FormNumber>**	AD1000GPM	Plan Details
FDIC statement	**<#FDIC statement>**	This Insurance Product is not a deposit in; not FDIC insured; not insured by any federal government agency; and is not guaranteed by the financial institution/affiliate.	Billing pages
Age range of eligibility	**<#EligibilityAgeRange>**	18-79	all
Certificate/Policy Name	**<#Cert/PolicyName>**	[Certificate of Insurance} for group states vs. [Policy] for individual	
Master Policy / Policy Name	**<#MasterPolicy/PolicyName>**	[Master Policy] for Group states vs. [Policy] for Individual	

HAP Product

Replaceable tag description	Tag name (used in site)	Example	Appears on pages
Font	**<#font>**	Arial, Helvetica	all
Logo/header	**<#Logo>**	[ABC Bank logo]	all
Background color	**<#BackgroundColor>**	#FFFFFF	all
Body font color	**<#BodyFontColor>**	#000000	
Header font color	**<#HeaderFontColor>**	#000000	
Input form background color	**<#FormBackgroundColor>**	#FFFFCC	
Left navigation	**<#LeftNavigation>**		all
Bottom navigation	**<#BottomNavigation>**		all
Right navigation	**<#RightNavigation>**		all
Carrier name	**<#CarrierName>**	Monumental Life Insurance Company	all
Customer description	**<#CustomerDescription>**	customer	all
Client/partner name	**<#Client/PartnerName>**	ABC Bank	all
Minimum eligibility age	**<#MinimumEligibilityAge>**	18	PP
Benefit decrease amount	**<#50%BenefitDecreaseAmount>**	50% at age 70	PP
Institution description	**<#InstitutionDescription>**	bank	PP
Benefit decrease age	**<#BenefitDecreaseAge>**	70	PP
Plan Administrator name	**<#PlanAdministrator>**	Plan Administrator	PP
Customer service 800-number	**<#CustomerServicePhone>**	1-888-367-2390	all
Customer service email address	**<#CustomerServiceEmailAddress>**	customerservice@driasi.com	all
Customer service days open	**<#CustomerServiceDaysOpen>**	Monday - Friday	all
Customer service open time	**<#CustomerServiceOpenTime>**	9 a.m.	all
Customer service close time	**<#CustomerServiceCloseTime>**	6 p.m.	all
Time zone	**<#CustomerServiceTimeZone>**	Eastern Time	all

Replaceable tag description	Tag name (used in site)	Example	Appears on pages
Review period	**<#ReviewPeriod>**	30	PP
spouse benefit	**<#SpouseBenefit>**	50%	PP
Form #	**<#FormNumber>**	AD1000GEM	PP
FDIC statement	**<#FDIC statement>**	This Insurance Product is not a deposit in; not FDIC insured; not insured by any federal government agency; and is not guaranteed by the financial institution/affiliate.	Billing pages
Age range of eligibility	**<#EligibilityAgeRange>**	18-79	all
Cost per day - cents	**<#CostPerDay>**	0.25	all
Cost of Individual Coverage	**<#IndividualRate>**	8.45	all
Cost of Individual + spouse Coverage	**<#IndividualFamilyRate>**	12.45	
Rate to add spouse	**<#SpouseRate>**	$4	all
Rate to add child	**<#ChildRate>**	$4	all
Maximum age of coverage for children	**<#ChildMaxAge>**	19	all
Maximum age of coverage for children who are students	**<#StudentMaxAge>**	23	all
Certificate/Policy Name	**<#Cert/PolicyName>**	[Certificate of Insurance} for group states vs. [Policy] for individual	
Master Policy / Policy Name	**<#MasterPolicy/PolicyName>**	[Master Policy] for Group states vs. [Policy] for Individual	

Accident Disability Product

Replaceable tag description	Tag name (used in site)	Example	Appears on pages
Font	**<#font>**	Arial, Helvetica	all
Logo/header	**<#Logo>**	[ABC Bank logo]	all
Background color	**<#BackgroundColor>**	#FFFFFF	all
Body font color	**<#BodyFontColor>**	#000000	
Header font color	**<#HeaderFontColor>**	#000000	
Input form background color	**<#FormBackgroundColor>**	#FFFFCC	
Left navigation	**<#LeftNavigation>**		all
Bottom navigation	**<#BottomNavigation>**		all
Right navigation	**<#RightNavigation>**		all
Carrier name	**<#CarrierName>**	Monumental Life Insurance Company	all
Customer description	**<#CustomerDescription>**	customer	all
Client/partner name	**<#Client/PartnerName>**	ABC Bank	all
Minimum eligibility age	**<#MinimumEligibilityAge>**	18	PP
Institution description	**<#InstitutionDescription>**	bank	PP
Plan Administrator name	**<#PlanAdministrator>**	Plan Administrator	PP
Customer service 800-number	**<#CustomerServicePhone>**	1-888-367-2390	all
Customer service email address	**<#CustomerServiceEmailAddress>**	customerservice@driasi.com	all
Customer service days open	**<#CustomerServiceDaysOpen>**	Monday - Friday	all
Customer service open time	**<#CustomerServiceOpenTime>**	9 a.m.	all
Customer service close time	**<#CustomerServiceCloseTime>**	6 p.m.	all
Time zone	**<#CustomerServiceTimeZone>**	Eastern Time	all
Review period	**<#ReviewPeriod>**	30	PP
spouse benefit	**<#SpouseBenefit>**	50%	PP
Form #	**<#FormNumber>**	AD1000GEM	PP

Replaceable tag description	Tag name (used in site)	Example	Appears on pages
FDIC statement	**<#FDIC statement>**	This Insurance Product is not a deposit in; not FDIC insured; not insured by any federal government agency; and is not guaranteed by the financial institution/affiliate.	Billing pages
Age range of eligibility	**<#EligibilityAgeRange>**	18-64	all
Cost of Individual Coverage	**<#IndividualRate>**	10.95	all
Cost of Individual + spouse Coverage	**<#IndividualFamilyRate>**	15.95	
Age of termination if disabled	**<#DisabilityTerminationAge>**	65	all
Certificate/Policy Name	**<#Cert/PolicyName>**	[Certificate of Insurance} for group states vs. [Policy] for individual	
Master Policy / Policy Name	**<#MasterPolicy/PolicyName>**	[Master Policy] for Group states vs. [Policy] for Individual	